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Global Data Center Cooling Pumps Supply, Demand and Key Producers, 2026-2032

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Abstracts

The global Data Center Cooling Pumps market size is expected to reach $ 5599 million by 2032, rising at a market growth of 17.5% CAGR during the forecast period (2026-2032).

Data Center Cooling Pump refers to pumping equipment designed to circulate, transfer and regulate cooling fluids within data center thermal-management systems. These pumps are deployed across facility-side chilled-water and heat-rejection loops as well as increasingly important liquid-cooling loops connected with Coolant Distribution Units (CDUs), where stable flow, rapid response and continuous operation are critical to maintaining server and IT equipment temperatures. Key performance parameters include flow rate, pump head, motor power, hydraulic efficiency, variable-speed capability, fluid compatibility, redundancy, vibration and noise characteristics, leakage reliability and integration with monitoring and control systems.

Key Findings

Facility-side pumps remain the structural base of Data Center Cooling Pump demand

CDU Pumps are becoming an increasingly important incremental segment as AI liquid cooling expands

Variable-speed operation intelligent monitoring and rapid flow response are becoming core product requirements

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The United States China and Europe remain the principal global data center demand regions

Competition is moving from standalone pump hardware toward integrated pump drive sensor and control solutions

Market Trends

The Data Center Cooling Pump market is moving from relatively standardized facility-water circulation toward a more diversified architecture combining large central pumps with compact, dynamically controlled liquid-cooling pumps. AI and HPC infrastructure are accelerating this transition because rack power densities have moved from around 120 kW toward several hundred kilowatts in advanced deployments, increasing the importance of liquid-based heat removal and precise coolant management. ASHRAE identifies liquid cooling as an increasingly important architecture for high-density AI facilities, while the Open Compute Project is promoting greater standardization around CDU commissioning, mechanical interfaces and telemetry. For pump suppliers, the direction of product development is therefore shifting toward higher efficiency, variable-speed operation, rapid ramp-up, compact installation, integrated sensing and predictive monitoring. Grundfos is already positioning pump-drive-sensor-control integration as a key architecture for modern IT cooling, while Moog is developing compact liquid-cooling pumps specifically for CDU, direct-to-chip and immersion applications. This trend does not eliminate conventional facility-side pumps; instead, it adds a new layer of pump demand closer to the IT load, creating a two-level market structure between high-flow infrastructure circulation and precision secondary-loop circulation.

Market Dynamics

Drivers

The primary growth driver for Data Center Cooling Pump is the continued expansion of data center computing capacity and the corresponding increase in cooling intensity. The International Energy Agency reported that data-center electricity demand increased by 17% in 2025, while AI-focused facilities grew substantially faster, indicating continued expansion in both computing infrastructure and associated thermal-management requirements. Higher-density AI servers place greater pressure on chilled-water systems, heat-rejection loops and local liquid-cooling circuits, increasing pump

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requirements in both new-build facilities and cooling-system upgrades. At the same time, energy efficiency is becoming more important because pumping systems operate for long periods and frequently under partial load. Variable-speed pumps, intelligent control and real-time temperature or pressure feedback allow coolant flow to follow changing IT loads rather than operating continuously at maximum design conditions. Grundfos identifies variable-speed operation and intelligent monitoring as key features for optimizing modern data center cooling, reinforcing the shift from fixed hydraulic design toward actively controlled pumping systems.

Restraints

Market development is constrained by the long operating life of conventional facility-side pumps, conservative qualification requirements and the high cost of modifying mission-critical cooling infrastructure. Large Split Case Pumps, Inline Pumps and End-Suction Pumps are generally embedded within wider chilled-water or heat-rejection systems, meaning replacement decisions depend not only on pump efficiency but also on piping layout, hydraulic balancing, redundancy philosophy and maintenance schedules. In liquid cooling, the challenge is different: CDU Pumps must provide compactness, precise flow control and high reliability while managing tighter coolant-quality and leakage requirements. The coexistence of air cooling, chilled-water cooling and multiple direct-liquid-cooling architectures also prevents a single pump design from becoming universal. This fragmentation increases engineering and qualification costs for pump suppliers and can slow product standardization, particularly as operators seek compatibility among pumps, CDUs, manifolds, cold plates and facility-water systems. The Open Compute Project's current emphasis on common CDU mechanical interfaces, telemetry and commissioning procedures reflects the industry's continuing need for greater interoperability.

Opportunities

The strongest opportunity is the expansion of CDU Pumps associated with direct liquid cooling and other high-density computing architectures. As heat is increasingly removed closer to CPUs, GPUs and accelerators, pump value shifts from simply moving large volumes of water to delivering accurately controlled flow within compact, redundant and digitally monitored systems. ASHRAE notes that liquid cooling is increasingly important for high-density AI/HPC installations, while current pump development is emphasizing fast ramp-up, integrated controls and compact form factors. This creates opportunities for suppliers with expertise in high-efficiency motors, magnetic or seal-reduced pump

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architectures, integrated drives, sensors and embedded control software. Retrofit projects represent another opportunity: existing data centers introducing liquid-cooled AI racks may retain their primary chilled-water infrastructure while adding CDUs and secondary-loop pumps, creating incremental demand without requiring complete replacement of the existing facility-side pumping system. The result is a market in which traditional pump suppliers can extend toward liquid-cooling OEM applications while specialized compact-pump suppliers can enter a market historically dominated by building-services and industrial pumping companies.

Challenges

The principal challenge is achieving high reliability while data center thermal loads become more dynamic and cooling architectures become more complex. Pump failure can affect a large number of servers, making redundancy, rapid switchover, monitoring and serviceability essential design considerations. Liquid-cooled AI equipment also introduces tighter requirements for coolant cleanliness, fluid compatibility, leak prevention and transient response. ASHRAE has highlighted unresolved engineering questions around resilient liquid-cooled data centers, including system behavior during flow interruptions and rapidly changing processor loads. Suppliers therefore need to balance hydraulic performance with controls, diagnostics and system integration. Competition is also broadening: conventional centrifugal-pump manufacturers increasingly address data center-specific solutions, while specialist motor and motion-control suppliers are entering CDU and direct-liquid-cooling pump applications. This creates pressure on suppliers to shorten development cycles while meeting the conservative reliability expectations of mission-critical infrastructure.

Industry Chain Analysis

The Data Center Cooling Pump industry chain begins with motors, drives, castings, stainless steel and engineered polymers, impellers, shafts, bearings, mechanical seals or seal-less magnetic components, sensors, power electronics and control modules. Pump manufacturers integrate these components through hydraulic design, motor matching, machining, assembly, testing and control-system development. For conventional Split Case Pumps, Inline Pumps and End-Suction Pumps, competitive value is concentrated in hydraulic efficiency, reliability, manufacturing scale, installed-base service capability and the ability to meet data center redundancy and energy-efficiency requirements. CDU Pumps place greater emphasis on compact motors,

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variable-speed drives, precision control, low leakage, coolant compatibility, sensor integration and high power density. Grundfos' IT-cooling offering illustrates the movement toward modular pump, drive, sensor and controller integration, while Moog's liquid-cooling architecture emphasizes compact magnetic pump designs intended for CDU and direct-to-chip applications.

Downstream, Data Center Cooling Pump products reach data center operators through multiple channels, including mechanical and electrical engineering contractors, cooling-system integrators, chiller and HVAC suppliers, CDU manufacturers, liquid-cooling system providers and direct OEM supply relationships. Facility-side pumps are normally specified relatively early in mechanical-system design and derive substantial lifecycle value from commissioning, replacement parts, monitoring and maintenance. CDU Pumps are increasingly selected as part of an integrated thermal-management subsystem, making co-development with CDU and server-cooling OEMs more important. As a result, the industry's value creation is gradually expanding from pump hardware toward engineering support, digital control, condition monitoring and lifecycle optimization, while manufacturing quality and global service coverage remain important barriers to entry for mission-critical applications.

Segment Insights

The study divides Data Center Cooling Pump into Split Case Pumps, Inline Pumps, End-Suction Pumps, CDU Pumps and Others. Split Case Pumps remain important in high-flow central cooling-water applications where efficiency, redundancy and long operating life are major purchasing considerations. Inline Pumps provide compact installation and are well suited to distributed mechanical systems and space-constrained plant configurations, while End-Suction Pumps offer standardized structures, broad operating ranges and relatively flexible installation across chilled-water and auxiliary circulation duties. These three categories form the established facility-side foundation of the market and continue to benefit from new data center construction as well as capacity expansion at existing facilities.

CDU Pumps represent the segment with the strongest structural change in product requirements. Unlike conventional facility pumps, CDU Pumps operate closer to IT equipment and must respond rapidly to changing server loads while meeting stringent requirements for compactness, fluid cleanliness, redundancy and leakage control. ASHRAE's guidance recognizes CDUs as a core component connecting facility-water systems with technology-cooling loops, with CDU configurations ranging from rack-

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mounted to floor-standing systems. Growing deployment of direct-to-chip and immersion cooling is therefore expanding the addressable market for compact, electronically controlled pumps. Moog's development of magnetic liquid-cooling pumps for CDUs, CPUs and GPUs and Grundfos' focus on variable-speed IT-cooling pumps illustrate this transition toward specialized pump architectures. Over the medium term, the market is expected to retain a large conventional facility-pump base while CDU Pumps capture a rising proportion of incremental technology-driven demand.

Downstream Market Opportunities

Data Center Cooling Pump demand is increasingly differentiated by the computing profile and cooling architecture of the downstream facility. Conventional enterprise and colocation sites continue to require reliable facility-side chilled-water and heat-rejection circulation, supporting demand for Split Case Pumps, Inline Pumps and End-Suction Pumps. The more significant incremental opportunity is emerging from hyperscale AI and HPC facilities, where higher rack densities are encouraging direct liquid cooling and more localized coolant distribution. ASHRAE reports that advanced AI rack densities are moving into several-hundred-kilowatt territory, creating thermal conditions that favor liquid cooling and stronger hydraulic segmentation. This increases opportunities for CDU Pumps, redundant pump modules, integrated pump-drive-control packages and smart monitoring solutions. Retrofit projects are also attractive because many existing facilities can add liquid-cooled IT capacity while continuing to use existing primary chilled-water infrastructure, generating demand for secondary pumps, CDUs and hydraulic-control upgrades rather than complete cooling-system replacement.

Regional Insights

North America, China and Europe form the principal demand centers for data center infrastructure and therefore represent the core regional markets for Data Center Cooling Pump. IEA data indicate that the United States accounted for approximately 45% of global data center electricity consumption in 2024, compared with around 25% for China and 15% for Europe, while these three regions are expected to remain the largest data center electricity-demand regions over the coming years. North America is particularly important for high-density hyperscale and AI infrastructure, supporting demand for both large facility-side pumps and rapidly expanding CDU Pump applications. The region's large installed base also creates a meaningful retrofit and replacement market as operators upgrade cooling architectures for higher-density computing.

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China combines large-scale data center construction with a substantial domestic pump-manufacturing base, creating stronger competition across both conventional and emerging cooling-pump categories. Europe has a mature chilled-water and HVAC engineering ecosystem and places strong emphasis on energy efficiency, water use and system optimization, which supports demand for variable-speed and intelligent pumping technologies. Southeast Asia is emerging as an additional development region; the IEA expects data-center electricity demand there to more than double by 2030, supported by expanding regional hubs. Regional competitive conditions will therefore differ: North America emphasizes hyperscale deployment and liquid-cooling transition, China combines volume expansion with localization, and Europe places comparatively greater weight on system efficiency, retrofit engineering and lifecycle performance.

Competitive Landscape Analysis

The Data Center Cooling Pump competitive landscape combines established global pump manufacturers with suppliers entering the market through compact liquid-cooling and intelligent motion technologies. The confirmed competitive group includes Grundfos, Xylem, Wilo, KSB, Ebara, Armstrong Fluid Technology, Moog, Taco Comfort Solutions, Pentair, Flowserve, Nanfang Pump Industry, SPX Flow, SPP Pumps, Zhejiang Dayuan Pumps, Feilong Auto Components, Johnson Electric and Panasonic. Established pump companies compete primarily through broad hydraulic portfolios, engineering capability, high-flow facility-side products, variable-speed technologies, service networks and long-term reliability, while newer liquid-cooling-oriented participants differentiate through compactness, rapid dynamic response, integrated electronics and compatibility with CDU architectures. Grundfos is expanding its IT-cooling positioning around integrated pumps, drives, sensors and controls, Xylem is extending water-management and liquid-cooling solutions across the data-center thermal chain, and Moog is targeting CDUs and direct liquid cooling with compact magnetic pump systems. The competitive structure is therefore becoming more layered rather than simply more concentrated: traditional facility-side pump capability remains essential, while success in the faster-evolving CDU Pump segment increasingly depends on OEM integration, electronics, software control, compact mechanical design and the ability to support accelerated product-development cycles.

Report Scope

Global Data Center Cooling Pumps Supply, Demand and Key Producers, 2026-2032

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This report studies the global Data Center Cooling Pumps production, demand, key manufacturers, and key regions.

This report is a detailed and comprehensive analysis of the world market for Data Center Cooling Pumps and provides market size (US$ million) and Year-over-Year (YoY) Growth, considering 2025 as the base year. This report explores demand trends and competition, as well as details the characteristics of Data Center Cooling Pumps that contribute to its increasing demand across many markets.

Highlights and key features of the study

Global Data Center Cooling Pumps total production and demand, 2021-2032, (Units)

Global Data Center Cooling Pumps total production value, 2021-2032, (USD Million)

Global Data Center Cooling Pumps production by region & country, production, value, CAGR, 2021-2032, (USD Million) & (Units), (based on production site)

Global Data Center Cooling Pumps consumption by region & country, CAGR, 2021-2032 & (Units)

U.S. VS China: Data Center Cooling Pumps domestic production, consumption, key domestic manufacturers and share

Global Data Center Cooling Pumps production by manufacturer, production, price, value and market share 2021-2026, (USD Million) & (Units)

Global Data Center Cooling Pumps production by Type, production, value, CAGR, 2021-2032, (USD Million) & (Units)

Global Data Center Cooling Pumps production by Application, production, value, CAGR, 2021-2032, (USD Million) & (Units)

This report profiles key players in the global Data Center Cooling Pumps market based on the following parameters - company overview, production, value, price, gross margin,

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product portfolio, geographical presence, and key developments. Key companies covered as a part of this study include Grundfos, Xylem, Wilo, KSB, Ebara, Armstrong Fluid Technology, Moog, Taco Comfort Solutions, Pentair, Flowserve, etc.

This report also provides key insights about market drivers, restraints, opportunities, new product launches or approvals.

Stakeholders would have ease in decision-making through various strategy matrices used in analyzing the World Data Center Cooling Pumps market

Detailed Segmentation:

Each section contains quantitative market data including market by value (US$ Millions), volume (production, consumption) & (Units) and average price (K US$/Unit) by manufacturer, by Type, and by Application. Data is given for the years 2021-2032 by year with 2025 as the base year, 2026 as the estimate year, and 2027-2032 as the forecast year.

Global Data Center Cooling Pumps Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

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Market Segmentation

Global Data Center Cooling Pumps Market, Segmentation by Type:

Split Case Pumps

Inline Pumps

End-Suction Pumps

CDU Pumps

Others

Global Data Center Cooling Pumps Market, Segmentation by Installation Base:

Facility-Side Pumps

Rack-Level Pumps

Others

Global Data Center Cooling Pumps Market, Segmentation by Power Range:

Up to 5 kW

Above 5 kW to 22 kW

Above 22 kW to 75 kW

Above 75 kW

Global Data Center Cooling Pumps Market, Segmentation by

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Application:

Enterprise Data Center

Communication Data Center

AI Data Center

Companies Profiled:

Grundfos

Xylem

Wilo

KSB

Ebara

Armstrong Fluid Technology

Moog

Taco Comfort Solutions

Pentair

Flowserve

Nanfang Pump Industry Co., Ltd

SPX Flow

SPP Pumps

Zhejiang Dayuan Pumps

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Feilong Auto Components Co., Ltd.

Johnson Electric

Panasonic

Key Questions Answered

1. How big is the global Data Center Cooling Pumps market?
2. What is the demand of the global Data Center Cooling Pumps market?
3. What is the year over year growth of the global Data Center Cooling Pumps market?
4. What is the total value of the global Data Center Cooling Pumps market?
5. Who are the Major Players in the global Data Center Cooling Pumps market?
6. What are the growth factors driving the market demand?

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