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Global Data Center In-Rack CDU Pumps Supply, Demand and Key Producers, 2026-2032

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Abstracts

The global Data Center In-Rack CDU Pumps market size is expected to reach $ 237 million by 2032, rising at a market growth of 32.0% CAGR during the forecast period (2026-2032).

Data Center In-Rack CDU Pumps are mission-critical electromechanical components installed inside rack-mounted Coolant Distribution Units to establish coolant flow and differential pressure on the Technology Cooling System side of a direct-to-chip liquid-cooling loop. The statistical boundary covers the hydraulic pump assembly, motor and inseparable drive electronics, including captive pump modules manufactured internally by CDU suppliers and valued at an equivalent manufacturer-transfer level. It excludes the complete CDU, heat exchanger, reservoir, filters, valves, control cabinet, leak detection, PSU, enclosure and piping, as well as in-row or facility-side pumps, server-integrated micro-pumps, immersion circulation pumps, distributor mark-ups and field service. Commercial designs increasingly combine BLDC motors, magnetic-drive or wet-rotor/seal-less hydraulic architectures, variable-speed control and CAN-based diagnostics. Representative rack-oriented products span roughly the 70–250 L/min class: Panasonic’s new platform reaches 70 L/min, Concentric’s WP1000DC is rated at 150 L/min at 280 kPa, while selected GRI Integrity models extend from approximately 56 L/min to more than 250 L/min. At system level, Nidec’s current 4U In-Rack CDU platform supports 200–250 kW cooling and incorporates redundant pumps, power supplies and controllers, illustrating why pump power density, reliability and serviceability have become as important as nominal flow.

Competition is characterized by a clear leader, a technically differentiated second tier and a still-material long tail of qualified suppliers, producing a 2025 Top 5 revenue concentration of 60.45%. Nidec ranks first with approximately USD 9.10 million in

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product revenue, equivalent to 35.04% of the global market, followed by Concentric, Panasonic, Delta and GRI Pumps (Gorman-Rupp Company). Nidec's position is supported by proprietary pump technology, automotive-grade reliability engineering, vertically integrated manufacturing, high-capacity 4U CDUs and substantial field deployment rather than by CDU assembly alone; its current In-Rack lineup uses Nidec-manufactured pumps, and the company reported a 10,000-unit class cumulative In-Rack CDU shipment base by 2026. Concentric addresses the premium industrial segment with high-pressure, seal-less pumps and configurable CAN control. Panasonic entered commercial data-centre cooling-pump deployment in 2025 with a compact higher-flow design. Delta competes through a broader thermal-management stack spanning fans, cold plates, control electronics and CDUs. GRI Pumps (Gorman-Rupp Company) leverages magnetic-drive BLDC technology and OEM customization, while Feilong Auto Components and Gates Corporation are expanding from commercial liquid-cooling and advanced motor-pump platforms. This structure leaves room for share redistribution because qualification scale, field reliability and hyperscale design wins remain more important than legacy pump-industry size alone.

Power class is becoming the primary determinant of value density. Pumps below 1 kW accounted for 69.15% of 2025 unit sales but only 47.90% of revenue, at an average selling price of approximately USD 492 per unit. The 1–2 kW class represented 24.69% of units and 36.73% of revenue, with an ASP of USD 1,058, while pumps above 2 kW represented only 6.16% of units but 15.36% of revenue at USD 1,774 per unit. Revenue CAGR for 2026–2032 is approximately 29.63% below 1 kW, 35.01% for 1–2 kW and 36.04% above 2 kW. This mix shift reflects rising rack heat loads, denser cold-plate networks and higher pressure losses, all of which reward compact motors with greater hydraulic output per unit volume. Cooling architecture shows the same premiumization pattern. Liquid-to-liquid products accounted for 83.06% of unit demand and 86.33% of revenue in 2025, with an ASP of USD 739 versus USD 573 for liquid-to-air products. Liquid-to-liquid revenue is expected to compound at 33.19% through 2032, ahead of 30.17% for liquid-to-air, reinforcing its role as the standard architecture for high-density AI racks connected to facility-water loops.

Mechanical form factor creates a second important segmentation because every additional U of rack space competes directly with revenue-generating compute equipment. The 4U format represented 59.10% of 2025 units and 61.19% of revenue, making it the market's central design point. ?2U and 3U systems each accounted for roughly 13% of unit demand, while >4U accounted for 14.02% of units but 19.37% of revenue due to higher pumping capacity and redundancy. Application demand is even more concentrated: Hyperscale Cloud & AI Compute Operators represented 48.23% of

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2025 units and 52.71% of revenue, with an ASP of USD 777. Colocation & Data Center Operators contributed 17.75% of revenue and Research & Government 12.09%, followed by Large Enterprise & Private/Hybrid Cloud, Telecom Operators & Telco Cloud and Edge & Distributed Computing Service Providers. Edge remains a small installed-base market but carries a 2026–2032 revenue CAGR of approximately 34.18%, whereas hyperscale and colocation continue to generate the largest absolute incremental revenue. Procurement criteria are therefore shifting away from peak-flow specifications toward full pump-curve efficiency, redundancy logic, coolant compatibility, telemetry, serviceability and fleet-level reliability.

Regional demand is led by Asia-Pacific, North America and Europe, while production is more concentrated in Japan and East Asia. Asia-Pacific accounted for 37.80% of global 2025 unit consumption, North America 34.49% and Europe 24.06%, with Latin America and the Middle East & Africa each below 2%. North America remains the highest-value demand centre because hyperscale cloud and AI infrastructure investment is concentrated there, while Europe places greater emphasis on energy efficiency, system standardization and lifecycle reliability. Asia-Pacific combines end-demand growth with a uniquely deep AI-server, electronics and thermal-management manufacturing ecosystem. On the production side, Japan accounted for approximately 38.32% of 2025 global units, Taiwan 16.53%, Europe 18.29%, North America 12.04% and China 8.79%. This creates a structurally export-oriented position for Japan and Taiwan. China’s current production share remains below Japan’s, but its combination of automotive electronic pumps, motors, power electronics, precision manufacturing, server ODMs and domestic AI-data-centre investment provides a credible route to higher localization. Feilong Auto Components has established a dedicated commercial liquid-cooling pump platform covering In Rack, Side Car and In Row applications, demonstrating the transition of Chinese suppliers from adjacent automotive thermal-management products toward dedicated IDC platforms.

Upstream economics are increasingly determined by high-value electromechanical and control components rather than by conventional pump housings. Critical inputs include permanent magnets, copper windings, BLDC motor laminations, power semiconductors, bearings or wet-running support materials, precision impellers, sensors, controllers, connectors and coolant-compatible polymers and metals. As the mix migrates from sub-1 kW products toward 1–2 kW and above-2 kW platforms, motor magnetic-circuit efficiency, rotor thermal management, dynamic balance, electronic-drive efficiency and long-duration material stability become progressively more important. Seal-less magnetic-drive and wet-rotor solutions can remove conventional shaft-seal failure modes, but they raise requirements for internal clearances, bearing materials, fluid

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lubrication characteristics and particulate cleanliness. Supply risk therefore centers on qualified electronic components, magnetic materials, precision parts and engineering-change control rather than solely on aggregate machining capacity. For hyperscale programs, an apparently minor material or semiconductor change may trigger renewed compatibility and endurance validation, increasing the value of traceability and long-term supplier continuity.

Midstream manufacturing has a substantially higher qualification barrier than nominal pump assembly. A commercially successful In-Rack CDU Pump supplier must reproduce hydraulic efficiency, motor efficiency, acoustic behavior, vibration, leakage performance and control response consistently across high-volume production. Manufacturing typically integrates hydraulic-component molding or machining, motor winding, rotor assembly, driver electronics, seal-less or wet-rotor integration, cleanliness management, balancing, pressure testing, leak testing, pump-curve characterization, electrical testing and endurance validation. Products for AI data centres must also operate across coolant concentration, temperature, viscosity and pressure changes while maintaining stable low-speed and failover behavior. Nidec highlights vertical integration from component processing through final product assembly, while GRI manufactures BLDC motors and a large portion of pump components internally to support OEM-specific hydraulic and electronic customization. Such vertical integration can reduce engineering-response time, strengthen process control and lower the risk that a supplier change in one component unexpectedly alters pump performance.

Downstream procurement is design-in driven, creating higher switching costs than in conventional catalog industrial pumps. Hyperscalers, server OEMs, CDU manufacturers and large data-centre operators evaluate the full operating curve, parasitic power, vibration, acoustic behavior, expected failure rate, hot-swap capability, redundant-pump control, CAN or Redfish communication, coolant-material compatibility, manufacturing traceability and long-term spare-part availability. The pump must be validated as part of a hydraulic system containing cold plates, manifolds, quick disconnects, filters and heat exchangers rather than as an isolated component. Redundancy directly multiplies content per rack: Delta’s 135 kW In-Rack CDU uses a 2+1 pump architecture, while Panasonic has demonstrated a three-pump arrangement within a 4U CDU, with two pumps running and one retained as redundancy. Consequently, rising rack heat load does not merely raise pump power; it can also raise physical pump count and replacement-value opportunity, which supports market growth above the rate of server-unit expansion.

The latest competitive cycle is shifting from basic liquid-cooling availability toward higher

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hydraulic work per rack unit, lower parasitic energy and field-proven reliability at scale. Nidec continues to advance 4U, 250 kW products using proprietary pumps and entered 2026 with a 10,000-unit class cumulative In-Rack CDU shipment base. Panasonic has increased pump flow from 40 L/min to 70 L/min without a comparable increase in package size. Gates has expanded an integrated data-centre fluid-management portfolio combining axial-flux pumps, hoses and connection technologies and positions its pumps for both In-Rack and In-Row CDU designs. Chinese suppliers are accelerating the migration of automotive e-pump and commercial thermal-management know-how into dedicated IDC products. At the macro level, capital expenditure by five major technology companies exceeded USD 400 billion in 2025 and is expected to rise substantially again in 2026, yet grid connections, transformers, advanced chips and planning approvals are creating tangible deployment bottlenecks. The principal 2026–2032 growth engines are therefore higher liquid-cooling penetration within AI racks, greater pump power, redundant pump configurations, brownfield liquid-cooling retrofits and new compute capacity in Asia and emerging regions rather than simple growth in the number of data-centre buildings.

Report Scope

This report studies the global Data Center In-Rack CDU Pumps production, demand, key manufacturers, and key regions.

This report is a detailed and comprehensive analysis of the world market for Data Center In-Rack CDU 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 In-Rack CDU Pumps that contribute to its increasing demand across many markets.

Highlights and key features of the study

Global Data Center In-Rack CDU Pumps total production and demand, 2021-2032, (K Units)

Global Data Center In-Rack CDU Pumps total production value, 2021-2032, (USD Million)

Global Data Center In-Rack CDU Pumps production by region & country,

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production, value, CAGR, 2021-2032, (USD Million) & (K Units), (based on production site)

Global Data Center In-Rack CDU Pumps consumption by region & country, CAGR, 2021-2032 & (K Units)

U.S. VS China: Data Center In-Rack CDU Pumps domestic production, consumption, key domestic manufacturers and share

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

Global Data Center In-Rack CDU Pumps production by Pump Rated Input Power, production, value, CAGR, 2021-2032, (USD Million) & (K Units)

Global Data Center In-Rack CDU Pumps production by End Market, production, value, CAGR, 2021-2032, (USD Million) & (K Units)

This report profiles key players in the global Data Center In-Rack CDU Pumps market based on the following parameters - company overview, production, value, price, gross margin, product portfolio, geographical presence, and key developments. Key companies covered as a part of this study include Nidec, Concentric, Panasonic, Delta, GRI Pumps (Gorman-Rupp Company), Feilong Auto Components, Gates Corporation, Walrus Pump, Brinkmann Pumps, 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 In-Rack CDU Pumps market

Detailed Segmentation:

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

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2027-2032 as the forecast year.

Global Data Center In-Rack CDU Pumps Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Market Segmentation

Global Data Center In-Rack CDU Pumps Market, Segmentation by Pump Rated Input Power:

Below 1kW

1-2kW

Above 2kW

Global Data Center In-Rack CDU Pumps Market, Segmentation by CDU Cooling:

Liquid-to-liquid

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Liquid-to-air

Global Data Center In-Rack CDU Pumps Market, Segmentation by Rack Height:

?2U

3U

4U

>4U

Global Data Center In-Rack CDU Pumps Market, Segmentation by End Market:

Hyperscale Cloud & AI Compute Operators

Colocation & Data Center Operators

Research & Government

Large Enterprise & Private/Hybrid Cloud

Telecom Operators & Telco Cloud

Edge & Distributed Computing Service Providers

Others

Companies Profiled:

Nidec

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Concentric

Panasonic

Delta

GRI Pumps (Gorman-Rupp Company)

Feilong Auto Components

Gates Corporation

Walrus Pump

Brinkmann Pumps

Key Questions Answered

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

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