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Global Data Center In-Rack CDU Pumps Market 2026 by Manufacturers, Regions, Type and Application, Forecast to 2032

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Abstracts

According to our (Global Info Research) latest study, the global Data Center In-Rack CDU Pumps market size was valued at US$ 26.72 million in 2025 and is forecast to a readjusted size of US$ 237 million by 2032 with a CAGR of 32.0% during review period.

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

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concentration of 60.45%. Nidec ranks first with approximately USD 9.10 million in 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

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more concentrated: Hyperscale Cloud & AI Compute Operators represented 48.23% of 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

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modes, but they raise requirements for internal clearances, bearing materials, fluid 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.

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The latest competitive cycle is shifting from basic liquid-cooling availability toward higher 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 is a detailed and comprehensive analysis for global Data Center In-Rack CDU Pumps market. Both quantitative and qualitative analyses are presented by manufacturers, by region & country, by Pump Rated Input Power and by End Market. As the market is constantly changing, this report explores the competition, supply and demand trends, as well as key factors that contribute to its changing demands across many markets. Company profiles and product examples of selected competitors, along with market share estimates of some of the selected leaders for the year 2025, are provided.

Key Features:

Global Data Center In-Rack CDU Pumps market size and forecasts, in consumption value ($ Million), sales quantity (K Units), and average selling prices (US$/Unit), 2021-2032

Global Data Center In-Rack CDU Pumps market size and forecasts by region and country, in consumption value ($ Million), sales quantity (K Units), and average selling

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prices (US$/Unit), 2021-2032

Global Data Center In-Rack CDU Pumps market size and forecasts, by Pump Rated Input Power and by End Market, in consumption value ($ Million), sales quantity (K Units), and average selling prices (US$/Unit), 2021-2032

Global Data Center In-Rack CDU Pumps market shares of main players, shipments in revenue ($ Million), sales quantity (K Units), and ASP (US$/Unit), 2021-2026

The Primary Objectives in This Report Are:

To determine the size of the total market opportunity of global and key countries

To assess the growth potential for Data Center In-Rack CDU Pumps

To forecast future growth in each product and end-use market

To assess competitive factors affecting the marketplace

This report profiles key players in the global Data Center In-Rack CDU Pumps market based on the following parameters - company overview, sales quantity, revenue, 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.

Data Center In-Rack CDU Pumps market is split by Pump Rated Input Power and by End Market. For the period 2021-2032, the growth among segments provides accurate calculations and forecasts for consumption value by Pump Rated Input Power, and by End Market in terms of volume and value. This analysis can help you expand your business by targeting qualified niche markets.

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Market Segmentation

Market segment by Pump Rated Input Power

Below 1kW

1-2kW

Above 2kW

Market segment by CDU Cooling

Liquid-to-liquid

Liquid-to-air

Market segment by Rack Height

?2U

3U

4U

>4U

Market segment by End Market

Hyperscale Cloud & AI Compute Operators

Colocation & Data Center Operators

Research & Government

Large Enterprise & Private/Hybrid Cloud

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Telecom Operators & Telco Cloud

Edge & Distributed Computing Service Providers

Others

Major players covered

Nidec

Concentric

Panasonic

Delta

GRI Pumps (Gorman-Rupp Company)

Feilong Auto Components

Gates Corporation

Walrus Pump

Brinkmann Pumps

Market segment by region, regional analysis covers

North America (United States, Canada, and Mexico)

Europe (Germany, France, United Kingdom, Russia, Italy, and Rest of Europe)

Asia-Pacific (China, Japan, Korea, India, Southeast Asia, and Australia)

South America (Brazil, Argentina, Colombia, and Rest of South America)

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Middle East & Africa (Saudi Arabia, UAE, Egypt, South Africa, and Rest of Middle East & Africa)

Chapter Outline

Chapter 1, to describe Data Center In-Rack CDU Pumps product scope, market overview, market estimation caveats and base year.

Chapter 2, to profile the top manufacturers of Data Center In-Rack CDU Pumps, with price, sales quantity, revenue, and global market share of Data Center In-Rack CDU Pumps from 2021 to 2026.

Chapter 3, the Data Center In-Rack CDU Pumps competitive situation, sales quantity, revenue, and global market share of top manufacturers are analyzed emphatically by landscape contrast.

Chapter 4, the Data Center In-Rack CDU Pumps breakdown data are shown at the regional level, to show the sales quantity, consumption value, and growth by regions, from 2021 to 2032.

Chapter 5 and 6, to segment the sales by Pump Rated Input Power and by End Market, with sales market share and growth rate by Pump Rated Input Power, by End Market, from 2021 to 2032.

Chapter 7, 8, 9, 10 and 11, to break the sales data at the country level, with sales quantity, consumption value, and market share for key countries in the world, from 2021 to 2026.and Data Center In-Rack CDU Pumps market forecast, by regions, by Pump Rated Input Power, and by End Market, with sales and revenue, from 2027 to 2032.

Chapter 12, market dynamics, drivers, restraints, trends, and Porters Five Forces analysis.

Chapter 13, the key raw materials and key suppliers, and industry chain of Data Center In-Rack CDU Pumps.

Chapter 14 and 15, to describe Data Center In-Rack CDU Pumps sales channel, distributors, customers, research findings and conclusion.

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