

Global Data Center Liquid-Cooling Primary-Loop Circulation Pump 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 Liquid-Cooling Primary-Loop Circulation Pump market size was valued at US\$ 322 million in 2025 and is forecast to a readjusted size of US\$ 1080 million by 2032 with a CAGR of 17.4% during review period.

Primary-loop circulation pumps for high-density liquid-cooled data centers refer to pump units and packaged pumping systems deployed on the facility side or primary side of liquid-cooling infrastructure in AI data centers, high-performance computing facilities and other high-density digital infrastructure. These pumps circulate chilled water, condenser water, water-glycol mixtures or other facility-side heat-transfer fluids between cooling towers, dry coolers, chillers, heat exchangers, distribution pipework and the primary-side interface of coolant distribution units. Their principal role is to maintain the required flow, head and differential pressure for continuous heat rejection while supporting variable-speed operation, redundancy architecture, monitoring, BMS/SCADA integration and energy-efficient control. Typical product forms include in-line centrifugal pumps, end-suction pumps, split-case pumps, vertical multistage pumps, canned motor pumps, magnetic-drive pumps, variable-speed pump packages and prefabricated hydraulic modules. On a 2025 global project procurement basis, standalone pump units generally range from approximately USD 5,000 to USD 120,000 per unit, while packaged pumping skids and prefabricated hydraulic modules may range from roughly USD 80,000 to over USD 500,000 depending on capacity, redundancy, materials, controls, certification and site delivery requirements.

Based on our research, primary-loop circulation pumps for high-density liquid-cooled data centers should be understood as a high-reliability application of mature pump

technology rather than as an entirely new pump category. The underlying products—centrifugal pumps, in-line pumps, end-suction pumps, split-case pumps, variable-speed pumps and packaged pumping systems—are well established in HVAC, industrial cooling and hydronic infrastructure. What changes in the liquid-cooled data center environment is the operating context. These pumps must support continuous 24/7 operation, redundancy, stable flow and differential pressure, integration with CDU primary-side interfaces, and coordination with chillers, dry coolers, cooling towers and heat exchangers. The value proposition is therefore shifting from equipment supply alone to hydraulic reliability, control precision, energy efficiency and uptime assurance.

From a supply-side perspective, the market is led by established pump and fluid-technology groups with deep HVAC, hydronic and industrial cooling capabilities. Grundfos, Wilo, Xylem, Armstrong Fluid Technology and KSB have the strongest combination of global engineering coverage, mission-critical cooling experience, smart pump controls and data-center-specific product evidence. Alongside these leaders, several mid-sized and specialist manufacturers are becoming increasingly relevant. Calpeda, MP Pumps, GemmeCotti, SPECK and Taco Comfort Solutions illustrate how stainless-steel pumps, magnetic-drive pumps, mission-critical pump packages and industrial cooling expertise can be repositioned for high-density liquid-cooling infrastructure. In China, Shanghai Kaiquan Pump Group and Nanfang Pump Industry already show stronger public evidence of data-center-related pump activity, while other domestic pump makers remain in a watchlist category pending clearer official product or project disclosures.

Demand is being reshaped by AI and high-performance computing. As rack densities rise and conventional air cooling becomes less economical at the high end, liquid cooling is moving from pilot projects into larger-scale deployment. In this context, the primary-loop circulation pump is not the most expensive item in the cooling chain, but it is structurally important. It governs the stability of facility-side heat transfer, contributes to pumping energy consumption, and affects redundancy, maintainability and operating risk. This means that procurement criteria are likely to place greater emphasis on system efficiency, variable-speed performance, redundancy design, materials compatibility, lifecycle service and digital monitoring rather than only on pump purchase price.

Policy and sustainability pressures are reinforcing the same direction. European data-center energy-performance reporting and rating initiatives are making PUE, WUE and operational transparency more visible, while Asian markets are increasingly linking new data-center approvals to power availability, cooling efficiency and water-resource

constraints. These trends support demand for higher-efficiency pumps, prefabricated hydraulic modules and more intelligent control architectures. Over the medium term, competition is expected to move away from generic HVAC pump substitution and toward application-proven liquid-cooling pump packages that can be specified early in the design phase, delivered rapidly for large AI campuses, and maintained with minimal operational disruption.

This report is a detailed and comprehensive analysis for global Data Center Liquid-Cooling Primary-Loop Circulation Pump market. Both quantitative and qualitative analyses are presented by manufacturers, by region & country, by Product Configuration and by Application. 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 Liquid-Cooling Primary-Loop Circulation Pump market size and forecasts, in consumption value (\$ Million), sales quantity (Units), and average selling prices (US\$/Unit), 2021-2032

Global Data Center Liquid-Cooling Primary-Loop Circulation Pump market size and forecasts by region and country, in consumption value (\$ Million), sales quantity (Units), and average selling prices (US\$/Unit), 2021-2032

Global Data Center Liquid-Cooling Primary-Loop Circulation Pump market size and forecasts, by Product Configuration and by Application, in consumption value (\$ Million), sales quantity (Units), and average selling prices (US\$/Unit), 2021-2032

Global Data Center Liquid-Cooling Primary-Loop Circulation Pump market shares of main players, shipments in revenue (\$ Million), sales quantity (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 Liquid-Cooling Primary-Loop

Circulation Pump

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 Liquid-Cooling Primary-Loop Circulation Pump 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 Grundfos Holding A/S, WILO SE, Xylem Inc., Armstrong Fluid Technology, KSB SE & Co. KGaA, Taco Comfort Solutions, Calpeda S.p.A., MP Pumps, Shanghai Kaiquan Pump Group, Nanfang Pump Industry, etc.

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

Market Segmentation

Data Center Liquid-Cooling Primary-Loop Circulation Pump market is split by Product Configuration and by Application. For the period 2021-2032, the growth among segments provides accurate calculations and forecasts for consumption value by Product Configuration, and by Application in terms of volume and value. This analysis can help you expand your business by targeting qualified niche markets.

Market segment by Product Configuration

Standalone Pump Unit

Packaged Pump Set

Prefabricated Hydraulic Module

Other

Market segment by Pump Design

In-line Centrifugal Pump

End-suction / Split-case Pump

Vertical Multistage Pump

Sealless / Magnetic / Canned Motor Pump

Other

Market segment by Working Fluid

Water

Water-Glycol Mixture

Treated / Deionized Water

Specialty Coolant

Other

Market segment by System Location

Facility-side Primary Loop

Chilled-water Loop

Condenser-water / Heat-rejection Loop

Hybrid Loop

Other

Market segment by Application

AI Training Data Center

AI Inference / Cloud Data Center

HPC / Supercomputing Facility

Colocation / Enterprise Retrofit

Other

Major players covered

Grundfos Holding A/S

WILO SE

Xylem Inc.

Armstrong Fluid Technology

KSB SE & Co. KGaA

Taco Comfort Solutions

Calpeda S.p.A.

MP Pumps

Shanghai Kaiquan Pump Group

Nanfeng Pump Industry

EBARA Corporation

GemmeCotti S.r.l.

SPECK Pumpen

Torishima Pump Mfg.

TERAL Inc.

Johnson Electric

Moog Inc.

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)

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

The content of the study subjects, includes a total of 15 chapters:

Chapter 1, to describe Data Center Liquid-Cooling Primary-Loop Circulation Pump product scope, market overview, market estimation caveats and base year.

Chapter 2, to profile the top manufacturers of Data Center Liquid-Cooling Primary-Loop Circulation Pump, with price, sales quantity, revenue, and global market share of Data Center Liquid-Cooling Primary-Loop Circulation Pump from 2021 to 2026.

Chapter 3, the Data Center Liquid-Cooling Primary-Loop Circulation Pump competitive situation, sales quantity, revenue, and global market share of top manufacturers are analyzed emphatically by landscape contrast.

Chapter 4, the Data Center Liquid-Cooling Primary-Loop Circulation Pump

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 Product Configuration and by Application, with sales market share and growth rate by Product Configuration, by Application, 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 Liquid-Cooling Primary-Loop Circulation Pump market forecast, by regions, by Product Configuration, and by Application, 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 Liquid-Cooling Primary-Loop Circulation Pump.

Chapter 14 and 15, to describe Data Center Liquid-Cooling Primary-Loop Circulation Pump sales channel, distributors, customers, research findings and conclusion.

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