

Global Data Center Cooling CDU Pumps Market Growth 2026-2032

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Abstracts

The global Data Center Cooling CDU Pumps market size is predicted to grow from US\$ 83.54 million in 2025 to US\$ 480 million in 2032; it is expected to grow at a CAGR of 23.9% from 2026 to 2032.

In 2025, global Data Center Cooling CDU Pumps capacity 150 k Units, sales reached approximately 140 k Units, with an average market price of around 610 USD/Unit, industrial gross margin 38%.

Data Center Cooling CDU Pumps have become a mission-critical element of the secondary coolant loop, determining coolant flow, differential pressure, temperature stability and ultimately the availability of liquid-cooled AI infrastructure rather than serving as conventional general-purpose circulation pumps. The product is installed inside in-rack, in-row or larger coolant distribution units and continuously circulates treated water, water-glycol mixtures or other qualified coolants between the CDU heat exchanger and cold plates or rear-door heat exchangers. The relevant product boundary therefore excludes facility-side chilled-water and cooling-tower pumps, chiller pumps and board-level server pumps that operate outside the CDU loop. Compact rack-level designs increasingly rely on centrifugal architectures with integrated brushless-DC motors, magnetic drive or other sealless configurations. Commercial products illustrate a performance envelope ranging from several litres per minute to roughly 145 L/min per pump, with maximum heads around 30 psi and system pressure ratings around 75 psi in compact OEM platforms, while larger CDU architectures scale secondary-loop flow into the thousands of litres per minute. Engineering requirements extend well beyond hydraulic output: supply-temperature stability at approximately $\pm 1^{\circ}\text{C}$, low acoustic and vibration levels, continuous-duty operation, redundancy, hot-swappable serviceability and extremely low leakage probability have become critical procurement parameters.

Wetted materials such as PPS engineering polymers, stainless steel, ceramics and EPDM or FKM elastomers must also retain chemical and mechanical stability over long operating periods with different coolant formulations.

Competitive differentiation is increasingly determined by integrated hydraulic, motor, control, materials and reliability engineering rather than by pump efficiency at a single operating point. Centrifugal pumps remain the dominant architecture because of their attractive flow-density, controllability and cost profile, but the market is progressively shifting toward sealless magnetic-drive and permanent-magnet canned-motor designs where leakage risk and maintenance intervention must be minimized. Conventional mechanically sealed pumps remain relevant at higher power levels but carry a different maintenance and lifecycle profile. Brushless-DC and permanent-magnet motors combined with PWM, analogue, CAN-bus or variable-frequency control enable coolant flow to track processor load dynamically, improving partial-load efficiency and system stability. The upstream supply chain encompasses motors, permanent magnets, impellers, pump housings, bearings, sealing and insulating materials, drive electronics and controllers. Midstream differentiation is concentrated in hydraulic design, electromagnetic and CFD simulation, integrated motor-pump packaging, precision manufacturing, rotor balancing, insulation, waterproofing and full-envelope endurance testing. Qualification by CDU OEMs and hyperscale customers places particular emphasis on stable pressure-flow curves, cavitation margin, fluid compatibility, electromagnetic compatibility, 24/7 lifetime performance and failover behaviour, making application validation and installed experience increasingly important competitive barriers.

End-market demand is shifting rapidly toward AI training clusters, hyperscale cloud infrastructure and high-density colocation deployments, making the product one of the more qualification-intensive components within the direct-liquid-cooling value chain. Direct-to-chip cold-plate cooling is currently the principal incremental application. In-rack CDUs prioritize compact footprint, low-voltage operation, low noise and tight electronic control, whereas in-row and centralized configurations place greater weight on higher flow, redundancy, service access and integration with facility controls. North America is at the forefront of high-pressure and large-scale liquid-cooling architectures because hyperscale operators and AI infrastructure developers increasingly specify liquid cooling at the platform-design stage. European adoption is more closely linked to energy efficiency, retrofit economics and heat-reuse strategies, while Japan benefits from a strong base in precision motors, compact pumps and vertically integrated electromechanical systems. China is developing a progressively deeper domestic supply chain as AI computing clusters, cloud operators and local server vendors adopt

liquid cooling. Nanfang Pump has introduced dedicated CHM liquid-cooling pumps and PBEAC permanent-magnet canned pumps for secondary CDU loops, while Johnson Electric markets dedicated cabinet- and rack-level CDU liquid-cooling pump solutions. Chinese suppliers have structural advantages in motors, electronics, precision molding and scale manufacturing, although long-duration reliability datasets, global coolant-compatibility validation, hyperscaler certification and international field-service coverage remain important differentiators.

The competitive structure is converging around specialist pump manufacturers, electromechanical platform suppliers and vertically integrated CDU companies, with system-level consolidation gradually shifting value toward suppliers that control both pumping hardware and thermal-management architecture. GRI Pumps is positioned around configurable brushless-DC, magnetic-drive solutions for CDU, in-rack and direct-to-chip OEM applications; Nidec combines proprietary pumps, motors and controls with its own CDU portfolio and has introduced sealless and hot-swappable pumping architectures; Panasonic entered the dedicated data-center cooling-pump segment in 2025 with a CDU-oriented circulation pump that increased representative flow from 40 L/min to 70 L/min within a similar package size, subsequently expanding into complete CDU systems. Johnson Electric and Nanfang Pump represent additional Asian component suppliers pursuing application-specific solutions. Vertiv, Schneider Electric/Motivair and Carrier are primarily system-level thermal-management vendors rather than independent pump specialists, but their CDU architectures strongly influence pump specifications, qualification requirements and sourcing decisions. Schneider Electric agreed in October 2024 to acquire a 75% controlling interest in Motivair for approximately US\$850 million and completed the controlling acquisition in February 2025, subsequently expanding its CDU platform for high-density AI infrastructure. The transaction illustrates a broader strategic shift toward ownership of liquid-cooling intellectual property and engineering capability. Growth in CDU pump demand will increasingly be driven by racks above 100 kW, multi-megawatt AI clusters, retrofit liquid-cooling projects and geographically localized AI infrastructure. Technology development will focus on higher hydraulic output per unit volume, higher pressure capability, sealless construction, variable-speed operation, condition monitoring, redundant pump modules and deeper controller integration. Key constraints remain platform fragmentation, coolant-material compatibility, leakage liability, extended customer qualification cycles and the possibility that further vertical integration by CDU manufacturers reduces the addressable opportunity for standardized standalone pump suppliers.

Report Scope

LP Information, Inc. (LPI) ' newest research report, the “Data Center Cooling CDU Pumps Industry Forecast” looks at past sales and reviews total world Data Center Cooling CDU Pumps sales in 2025, providing a comprehensive analysis by region and market sector of projected Data Center Cooling CDU Pumps sales for 2026 through 2032. With Data Center Cooling CDU Pumps sales broken down by region, market sector and sub-sector, this report provides a detailed analysis in US\$ millions of the world Data Center Cooling CDU Pumps industry.

This Insight Report provides a comprehensive analysis of the global Data Center Cooling CDU Pumps landscape and highlights key trends related to product segmentation, company formation, revenue, and market share, latest development, and M&A activity. This report also analyzes the strategies of leading global companies with a focus on Data Center Cooling CDU Pumps portfolios and capabilities, market entry strategies, market positions, and geographic footprints, to better understand these firms' unique position in an accelerating global Data Center Cooling CDU Pumps market.

This Insight Report evaluates the key market trends, drivers, and affecting factors shaping the global outlook for Data Center Cooling CDU Pumps and breaks down the forecast by CDU Installation, by End Market, geography, and market size to highlight emerging pockets of opportunity. With a transparent methodology based on hundreds of bottom-up qualitative and quantitative market inputs, this study forecast offers a highly nuanced view of the current state and future trajectory in the global Data Center Cooling CDU Pumps.

This report presents a comprehensive overview, market shares, and growth opportunities of Data Center Cooling CDU Pumps market by product type, application, key manufacturers and key regions and countries.

Market Segmentation

Segmentation by CDU Installation:

In-Rack CDU

In-Row CDU

Segmentation by Pump Rated Input Power:

Below 1kW

1-2kW

Above 2kW

Segmentation by CDU Cooling:

Liquid-to-liquid

Liquid-to-air

Segmentation by Hydraulic Principle:

Centrifugal Pump

Positive Displacement Pump

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

This report also splits the market by region:

Americas

United States

Canada

Mexico

Brazil

APAC

China

Japan

Korea

Southeast Asia

India

Australia

Europe

Germany

France

UK

Italy

Russia

Middle East & Africa

Egypt

South Africa

Israel

Turkey

GCC Countries

The below companies that are profiled have been selected based on inputs gathered from primary experts and analysing the company's coverage, product portfolio, its market penetration.

Nidec

Concentric

Panasonic

Delta

GRI Pumps (Gorman-Rupp Company)

Feilong Auto Components

Gates Corporation

Walrus Pump

Brinkmann Pumps

Sunon

Johnson Electric

KSB

Grundfos

Moog

Wilo

Sundyne (Honeywell)

Nanfeng Pump Industry

Tark Thermal Solutions

Calpeda

Key Questions Addressed in this Report

What is the 10-year outlook for the global Data Center Cooling CDU Pumps market?

What factors are driving Data Center Cooling CDU Pumps market growth, globally and by region?

Which technologies are poised for the fastest growth by market and region?

How do Data Center Cooling CDU Pumps market opportunities vary by end market size?

How does Data Center Cooling CDU Pumps break out by CDU Installation, by End Market?

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