

Global Data Center In-Rack CDU Pumps Market Growth 2026-2032

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Abstracts

The global Data Center In-Rack CDU Pumps market size is predicted to grow from US\$ 108 million in 2025 to US\$ 898 million in 2032; it is expected to grow at a CAGR of 25.9% from 2026 to 2032.

In 2025, global Data Center In-Rack CDU Pumps capacity 30,000 Units, sales reached approximately 29,000 Units, with an average market price of around 3,800 USD/Unit, industrial gross margin 38%.

Data Center In-Rack CDU Pumps are the hydraulic core of rack-level liquid-cooling systems, maintaining coolant circulation, differential pressure, temperature stability and emergency flow continuity close to the IT load. They are normally integrated with a plate heat exchanger, filter, reservoir or expansion device, valves, sensors, leak detection and a controller inside a standard 19-inch or open-compute rack. The facility-water system and the technology-cooling system remain hydraulically isolated, while the pump circulates secondary coolant through rack manifolds, quick disconnects and cold plates attached to CPUs, GPUs, memory and networking components. Unlike facility chilled-water pumps, Data Center In-Rack CDU Pumps must deliver precise hydraulic performance within a tightly constrained rack envelope and are primarily deployed in AI training racks, inference clusters, HPC systems, liquid-cooled enterprise servers and retrofit installations.

The competitive benchmark for Data Center In-Rack CDU Pumps has shifted from basic coolant circulation to hydraulic performance per rack unit, transient response and system-level availability. Most current rack CDUs occupy approximately 4U, although platforms from 2U to 10U are available. Established configurations typically support 60–150 kW, while new 4U designs have reached 200–300 kW. Secondary-loop flow

commonly falls within 50–170 L/min, with higher-density systems entering the 100–300 L/min band; approximately 1.0–1.5 L/min per kW is a practical design range for many direct-to-chip systems. Available pressure is commonly designed around 0.8–4.0 bar, depending on cold-plate resistance, manifold topology, filters and quick-disconnect losses. Typical heat-exchanger approach temperatures are 3–6°C, while coolant operating envelopes can extend from roughly 10°C to 70°C and accommodate treated water, de-ionized water or water-glycol mixtures.

The preferred technology architecture combines centrifugal hydraulics with seal-less construction, variable-speed drives and embedded sensing. Conventional centrifugal pumps remain dominant because they provide an effective balance of flow, efficiency, packaging flexibility and industrial maturity. Magnetic-drive and canned-motor designs are gaining importance because they eliminate rotating shaft seals and reduce potential leakage points near high-value computing equipment. Brushless DC motors, electronically commutated motors and variable-frequency drives allow the CDU to regulate flow or differential pressure in response to real-time IT load. Advanced designs monitor inlet pressure, discharge pressure, coolant temperature, flow, motor current, vibration and cavitation indicators, enabling automatic pump sequencing and predictive maintenance. Hydraulic margin must account for filter loading, coolant viscosity, parallel-pump interaction and increasing cold-plate pressure drop rather than relying only on nominal pump curves.

The industry structure is increasingly defined by co-engineering between pump suppliers, CDU manufacturers, server OEMs and data-center operators. Relevant pump and drive suppliers include Nidec, GRI Pumps, Grundfos, Wilo, KSB, Moog, Johnson Electric and Panasonic. CDU and liquid-cooling platform suppliers include Schneider Electric's Motivair, Vertiv, CoolIT Systems, nVent, Eaton's Boyd Thermal, Delta Electronics, Rittal and Supermicro, while Chinese system suppliers such as Envicool, Sugon Data Energy and ZTE are expanding rack-level CDU portfolios. Some CDU manufacturers procure qualified pump modules, while vertically integrated suppliers develop proprietary pumps, drives and control algorithms. Qualification increasingly covers hot-swap operation, N+1 redundancy, coolant compatibility, pressure cycling, cavitation resistance, electromagnetic compatibility, leak integrity and integration with Redfish, Modbus, SNMP and data-center infrastructure management platforms.

The Data Center In-Rack CDU Pumps market is moving toward higher cooling density, intelligent redundancy and standardized rack-scale deployment. Nidec's June 2026 announcement of a 300 kW in-rack CDU illustrates the rapid increase in hydraulic and thermal performance expected from a 4U platform. Open-compute architectures are

also establishing more demanding benchmarks for approach temperature, pressure availability, filtration, pump redundancy and system uptime. Industry consolidation is reinforcing this transition: Eaton completed its US\$9.5 billion acquisition of Boyd Thermal in March 2026, combining liquid-cooling technologies—including cold plates, CDUs and heat exchangers—with power distribution and data-center electrical infrastructure. Growth will be concentrated in AI factories, liquid-ready colocation capacity, enterprise retrofits, high-density edge deployments and replacement demand for redundant pump modules, while the principal engineering constraints will remain rack-space consumption, coolant chemistry, hydraulic balancing and lengthy reliability qualification cycles.

Report Scope

LP Information, Inc. (LPI) ' newest research report, the “Data Center In-Rack CDU Pumps Industry Forecast” looks at past sales and reviews total world Data Center In-Rack CDU Pumps sales in 2025, providing a comprehensive analysis by region and market sector of projected Data Center In-Rack CDU Pumps sales for 2026 through 2032. With Data Center In-Rack 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 In-Rack CDU Pumps industry.

This Insight Report provides a comprehensive analysis of the global Data Center In-Rack 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 In-Rack 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 In-Rack CDU Pumps market.

This Insight Report evaluates the key market trends, drivers, and affecting factors shaping the global outlook for Data Center In-Rack CDU Pumps and breaks down the forecast by Hydraulic Principle, by Application, 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 In-Rack CDU Pumps.

This report presents a comprehensive overview, market shares, and growth opportunities of Data Center In-Rack CDU Pumps market by product type, application,

key manufacturers and key regions and countries.

Segmentation by Hydraulic Principle:

Centrifugal

Magnetic-drive

Others

Segmentation by Heat-rejection Architecture:

Liquid-to-liquid

Liquid-to-air

Segmentation by Flow:

Below 100 L/min

100–200 L/min

Above 200 L/min

Segmentation by Application:

AI Training and Inference

HPC and Scientific Computing

Cloud Infrastructure

Enterprise IT

Telecommunication

High-density Edge Computing

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.

GRI Pumps

Sunon

Walrus Pump

AVC

Delta

Feilong

Nidec

Johnson Electric

Gates Corporation

KSB

Concentric

Brinkmann Pumps

Grundfos

Moog

Wilo

Sundyne

Xylem

Nanfeng Pump Industry

Key Questions Addressed in this Report

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

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

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

How do Data Center In-Rack CDU Pumps market opportunities vary by end market size?

How does Data Center In-Rack CDU Pumps break out by Hydraulic Principle, by Application?

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