

Global Data Center Liquid-Cooling Primary-Loop Circulation Pump Market Growth 2026-2032

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Abstracts

The global Data Center Liquid-Cooling Primary-Loop Circulation Pump market size is predicted to grow from US\$ 306 million in 2025 to US\$ 1085 million in 2032; it is expected to grow at a CAGR of 18.5% from 2026 to 2032.

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.

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

This Insight Report provides a comprehensive analysis of the global Data Center Liquid-Cooling Primary-Loop Circulation Pump 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 Liquid-Cooling Primary-Loop Circulation Pump portfolios and capabilities, market entry strategies, market positions, and geographic footprints, to better understand these firms' unique position in an accelerating global Data Center Liquid-Cooling Primary-Loop Circulation Pump market.

This Insight Report evaluates the key market trends, drivers, and affecting factors shaping the global outlook for Data Center Liquid-Cooling Primary-Loop Circulation Pump and breaks down the forecast by Product Configuration, 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 Liquid-Cooling Primary-Loop Circulation Pump.

This report presents a comprehensive overview, market shares, and growth opportunities of Data Center Liquid-Cooling Primary-Loop Circulation Pump market by product type, application, key manufacturers and key regions and countries.

Segmentation by Product Configuration:

Standalone Pump Unit

Packaged Pump Set

Prefabricated Hydraulic Module

Other

Segmentation by Pump Design:

In-line Centrifugal Pump

End-suction / Split-case Pump

Vertical Multistage Pump

Sealless / Magnetic / Canned Motor Pump

Other

Segmentation by Working Fluid:

Water

Water-Glycol Mixture

Treated / Deionized Water

Specialty Coolant

Other

Segmentation by System Location:

Facility-side Primary Loop

Chilled-water Loop

Condenser-water / Heat-rejection Loop

Hybrid Loop

Other

Segmentation by Application:

AI Training Data Center

AI Inference / Cloud Data Center

HPC / Supercomputing Facility

Colocation / Enterprise Retrofit

Other

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.

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

EBARA Corporation

GemmeCotti S.r.l.

SPECK Pumpen

Torishima Pump Mfg.

TERAL Inc.

Johnson Electric

Moog Inc.

Key Questions Addressed in this Report

What is the 10-year outlook for the global Data Center Liquid-Cooling Primary-Loop Circulation Pump market?

What factors are driving Data Center Liquid-Cooling Primary-Loop Circulation Pump market growth, globally and by region?

Which technologies are poised for the fastest growth by market and region?
How do Data Center Liquid-Cooling Primary-Loop Circulation Pump market opportunities vary by end market size?
How does Data Center Liquid-Cooling Primary-Loop Circulation Pump break out by Product Configuration, by Application?

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