

Data Center Cooling CDU Pumps Market by Pump Type (Centrifugal, Magnetic & Canned Motor Pumps), Type of Cooling (Direct-to-Chip, Immersion, Hybrid), Data Center Type (Hyperscale, Colocation, Enterprise), and Region - Global Forecast to 2032

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Abstracts

The data center cooling CDU pumps market is projected to grow from USD 0.34 billion in 2026 to USD 1.84 billion by 2032, registering a CAGR of 32.7%. The market is set for strong growth in the coming forecast window, largely because AI, machine learning, cloud computing, and high-performance computing workloads are expanding rapidly and driving higher heat densities inside today's data centers. Older air-cooling methods just aren't cutting it anymore for these thermal loads, so operators are leaning harder into liquid cooling setups, especially direct-to-chip and liquid-to-liquid cooling architectures, where CDU pumps do much of the heavy lifting by circulating coolant and keeping temperatures in the right zone.

“Centrifugal inline pumps are expected to surpass other pump types during the forecast period.”

The centrifugal inline pumps segment is expected to account for the largest share of the data center cooling CDU pumps market over the forecast period. This segment is driven by the widespread adoption of centrifugal inline pumps in liquid cooling systems, which deliver high hydraulic efficiency, a compact footprint, and reliable, continuous coolant circulation in mission-critical data center environments. These pumps are designed for direct integration into piping networks, enabling simplified installation, reduced space requirements, and optimized coolant flow management, making them particularly suitable for modern CDU architectures. The growing deployment of direct-to-chip cooling solutions across hyperscale, colocation, enterprise, and AI-focused data centers

is further driving demand for centrifugal inline pumps. As rack power densities continue to rise due to AI, machine learning, and high-performance computing workloads, data center operators require pumping solutions that maintain stable flow rates, precise pressure control, and uninterrupted operation under demanding thermal conditions. Centrifugal inline pumps effectively meet these requirements while offering advantages such as low maintenance, scalability, energy-efficient performance, and compatibility with variable-speed drive technologies.

“The direct-to-chip cooling segment is expected to secure the leading position during the forecast period.”

Direct-to-chip cooling is expected to be the largest and fastest-growing segment in the data center cooling CDU pumps market during the forecast period. This momentum stems largely from the growing deployment of AI, machine learning, and high-performance computing workloads, which generate higher heat loads than older computing setups. Direct-to-chip cooling delivers coolant directly to heat-intensive components, such as CPUs, GPUs, and AI accelerators, enabling better thermal efficiency, more effective heat removal, and overall stronger system performance. As many data center operators seek to handle higher rack power densities while cutting energy use and maintaining proper operating conditions, adoption of direct-to-chip cooling systems continues to accelerate across hyperscale, colocation, and enterprise sites. Additionally, the approach can help improve power usage effectiveness (PUE), reduce cooling-related energy costs, and support the next generation of AI-ready infrastructure, which should keep the segment in a leadership role throughout the forecast period.

“The data center cooling CDU pumps market in North America is the largest during the forecast period.”

North America's dominance in the data center cooling CDU pumps market is driven by a mature data center ecosystem, significant investments in hyperscale facilities, and the rapid adoption of AI, cloud services, and high-performance computing. The US, in particular, has a large concentration of major cloud service providers, colocation operators, and technology firms deploying liquid cooling to manage higher rack power densities and associated heat loads. As a result, demand is rising for more advanced CDU pumps to maintain smooth coolant circulation, reliable thermal control, and uninterrupted operation. Moreover, increased funding for AI-ready infrastructure, a stronger emphasis on energy efficiency and sustainability, and early moves toward direct-to-chip cooling are helping the market continue to expand. The region also enjoys

solid technological innovation, active investment, and continuous data center buildouts, reinforcing its leading position throughout the forecast period.

Profile break-up of primary participants for the report:

By Company Type: Tier 1 – 45%, Tier 2 – 22%, and Tier 3 – 33%

By Designation: C-Level Executives– 50%, Directors– 10%, and Others – 40%

By Region: North America – 17%, Asia Pacific – 17%, Europe – 33%, Middle East & Africa – 25%, and South America – 8%

Leading players in the data center cooling CDU pumps market include Grundfos Holding A/S (Denmark), Xylem (US), WILO SE (Lebanon), EBARA Corporation (US), Johnson Electric Holdings Limited (China), Flowserve Corporation (US), Gates Corporation (US), Gorman-Rupp Industries (US), SPP Pumps Limited (UK), Panasonic Holdings Corporation (Japan), SPAL Automotive Srl (Italy), Tark Thermal Solutions (Germany), GuangDong Shenpeng Technology Co., Ltd. (China), Calpeda S.p.A., P.IVA (Italy), Changsha TOPS Industry & Technology Co., Ltd. (China), a Moog Company (US), Concentric AB (UK), AMETEK, Inc. (US), Fluid-o-Tech (Italy), and Crest Pumps Ltd (UK), among others. These players are significant contributors to the data center cooling CDU pumps market. They have adopted various strategies, including agreements, joint ventures, and expansions, to increase their market share and revenue.

Research Coverage:

The report defines segments and projects the size of the data center cooling CDU pumps market by pump type, type of cooling, data center type, CDU type, and region. It strategically profiles key players and comprehensively analyzes their market share and core competencies. It also tracks and analyzes competitive developments, such as expansions, partnerships, and acquisitions undertaken by these players.

Reasons to Buy this Report:

The report is expected to help market leaders and new entrants by providing the closest approximations of revenue figures for the data center cooling CDU pumps market and its segments. It is also expected to help stakeholders gain a deeper understanding of

the market's competitive landscape, acquire valuable insights to enhance their business positions, and develop effective go-to-market strategies. It also enables stakeholders to understand the market's pulse and provides information on key market drivers, restraints, challenges, and opportunities.

The report provides insights into the following pointers:

Analysis of drivers (Rising rack power densities, Rise in adoption of liquid cooling technologies in data centers, Expansion of hyperscale and AI data centers, Growing demand for energy efficient cooling solutions), restraints (High capital investment limiting adoption of CDU pumps, Incompatibility with legacy data center infrastructure limiting CDU pump deployment), opportunities (Development of energy-efficient CDU pumps, Integration of CDU pumps with Digital Monitoring and Predictive Maintenance Systems), and challenges (Balancing high-performance requirements with long-term pump reliability) are influencing the growth of the data center cooling CDU pumps market.

Product Development/Innovation: Detailed insights into upcoming technologies, research & development activities in the data center cooling CDU pumps market.

Market Development: Comprehensive information about lucrative markets – the report analyzes the data center cooling CDU pumps market across varied regions.

Market Diversification: Exhaustive information about new products, various types, untapped geographies, recent developments, and investments in the ultra-high-purity graphite market.

Competitive Assessment: In-depth assessment of market shares, growth strategies, and product offerings of leading players such as Grundfos Holding A/S (Denmark), Xylem (US), WILO SE (Lebanon), EBARA Corporation (US), Johnson Electric Holdings Limited (China), Flowserve Corporation (US), Gates Corporation (US), Gorman-Rupp Industries (US), SPP Pumps Limited (UK), Panasonic Holdings Corporation (Japan), SPAL Automotive Srl (Italy), Tark Thermal Solutions (Germany), GuangDong Shenpeng Technology Co., Ltd. (China), Calpeda S.p.A., P.IVA (Italy), Changsha TOPS Industry & Technology Co., Ltd. (China), a Moog Company (US), Concentric AB (UK), AMETEK, Inc. (US), Fluid-o-Tech (Italy), and Crest Pumps Ltd (UK).

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