

# Global In-Row Coolant Distribution Units (CDU) Market Research Report 2026(Status and Outlook)

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## Abstracts

In-Row Coolant Distribution Units (CDUs) are full-sized systems designed to be installed alongside server racks, offering highly efficient cooling solutions for data centers. These units operate by circulating coolant through a closed-loop system on the secondary side, which is responsible for cooling the servers. The primary side of the CDU utilizes facility water to absorb and reject the heat generated by the servers. This separation between the coolant and facility water helps prevent contamination and enhances system reliability. By being located close to the heat source, In-Row CDUs can optimize cooling efficiency, reduce energy consumption, and ensure stable operating temperatures for critical IT infrastructure. Coolant distribution unit (CDU) is a system that enables smaller, more efficient, more precise liquid cooling in a data center at rack level, often integrating facility water. The CDU circulates coolant in a closed loop system within the rack on the secondary (Cooling Application) side and utilizes facility water on the primary (Heat Rejection) side. A CDU has a pump, reservoir, power supply, control board and a heat-exchanger as the key components. Filters, flow meters, pressure transducers, and other devices are also used in managing the operation of the CDU in conjunction with the Server Rack. With data center workloads ever increasing due to advanced analytics, AI, and the digitization of every process, the average rack power draw has shot up considerably. And, as we know, with more power draw comes more waste heat that needs to be removed from the rack and eventually the white space. Based on this, liquid cooling technology is gradually replacing traditional air cooling technology to provide high performance solutions to data centers. As a key part of liquid cooling system, CDU will benefit from the permeability of liquid cooling in data centers accordingly. As data center footprints continue to shrink due to urbanization and real estate constraints, optimizing space utilization has become a pressing priority for data center managers. Liquid cooling solutions offer a compact and space-efficient alternative to traditional air cooling systems, enabling data centers to

maximize their rack densities and floor space without compromising thermal performance. Moreover, the scalability of liquid cooling systems makes them well-suited for accommodating future growth and expansion. By modularizing cooling infrastructure and deploying liquid cooling units in a distributed manner, data centers can easily scale their cooling capacity in response to changing workload demands. This flexibility not only enhances operational agility but also streamlines the deployment of new IT equipment without the need for extensive retrofitting or reconfiguration.

The global In-Row Coolant Distribution Units (CDU) market size was estimated at USD 344.0 million in 2025 and is projected to grow at a compound annual growth rate (CAGR) of 20.70% during the forecast period.

This report offers a comprehensive and in-depth analysis of the global In-Row Coolant Distribution Units (CDU) market, covering all critical facets from a broad macroeconomic overview to detailed micro-level insights. It examines market size, competitive landscape, emerging development trends, niche segments, key drivers and challenges, as well as conducts SWOT and value chain analyses.

The insights provided enable readers to understand the competitive dynamics within the industry and formulate effective strategies to enhance profitability and market positioning. Additionally, the report presents a clear framework for evaluating the current status and future outlook of business organizations operating in this sector.

A significant focus of this report lies in the competitive landscape of the global In-Row Coolant Distribution Units (CDU) market. It offers detailed profiles of major players, including their market shares, performance metrics, product portfolios, and operational status. This enables stakeholders to identify leading competitors and gain a nuanced understanding of market rivalry and structure.

In summary, this report serves as an essential resource for industry participants, investors, researchers, consultants, and business strategists, as well as anyone planning to enter or expand their presence in the In-Row Coolant Distribution Units (CDU) market.

## **Global In-Row Coolant Distribution Units (CDU) Market: Market Segmentation Analysis**

This research report provides a detailed segmentation of the market by region (country), key manufacturers, product type, and application. Market segmentation divides the

overall market into distinct subsets based on factors such as product categories, end-user industries, geographic locations, and other relevant criteria.

A clear understanding of these market segments enables decision-makers to tailor their product development, sales, and marketing strategies more effectively to meet the unique needs of each segment. Leveraging market segmentation insights can significantly enhance targeted approaches, optimize resource allocation, and accelerate product innovation cycles by aligning offerings with the specific demands of diverse customer groups.

### **Key Company**

Vertiv  
Schneider Electric  
nVent  
CoolIT Systems  
Boyd  
Envicool  
Nortek DCC  
Delta Electronics  
Coolcentric  
DCX  
Chillydyne  
Kehua Data

### **Market Segmentation (by Type)**

Liquid to Air CDU  
Liquid to Liquid CDU

### **Market Segmentation (by Application)**

Internet  
Telecommunications  
Finance  
Government  
Other

### **Geographic Segmentation**

North America (USA, Canada, Mexico)

Europe (Germany, UK, France, Russia, Italy, Rest of Europe)

Asia-Pacific (China, Japan, South Korea, India, Southeast Asia, Rest of Asia-Pacific)

South America (Brazil, Argentina, Columbia, Rest of South America)

The Middle East and Africa (Saudi Arabia, UAE, Egypt, Nigeria, South Africa, Rest of MEA)

### **Key Benefits of This Market Research:**

Industry drivers, restraints, and opportunities covered in the study

Neutral perspective on the market performance

Recent industry trends and developments

Competitive landscape & strategies of key players

Potential & niche segments and regions exhibiting promising growth covered

Historical, current, and projected market size, in terms of value

In-depth analysis of the In-Row Coolant Distribution Units (CDU) Market

Overview of the regional outlook of the In-Row Coolant Distribution Units (CDU) Market:

### **Customization of the Report**

In case of any queries or customization requirements, please connect with our sales team, who will ensure that your requirements are met.

### **Chapter Outline**

Chapter 1 mainly introduces the statistical scope of the report, market division standards, and market research methods.

Chapter 2 is an executive summary of different market segments (by region, product type, application, etc), including the market size of each market segment, future development potential, and so on. It offers a high-level view of the current state of the In-Row Coolant Distribution Units (CDU) Market and its likely evolution in the short to mid-term, and long term.

Chapter 3 makes a detailed analysis of the market's competitive landscape of the market and provides the market share, capacity, output, price, latest development plan, merger, and acquisition information of the main manufacturers in the market.

Chapter 4 is the analysis of the whole market industrial chain, including the upstream and downstream of the industry, as well as Porter's five forces analysis.

Chapter 5 introduces the latest developments of the market, the driving factors and restrictive factors of the market, the challenges and risks faced by manufacturers in the industry, and the analysis of relevant policies in the industry.

Chapter 6 provides the analysis of various market segments according to product types, covering the market size and development potential of each market segment, to help readers find the blue ocean market in different market segments.

Chapter 7 provides the analysis of various market segments according to application, covering the market size and development potential of each market segment, to help readers find the blue ocean market in different downstream markets.

Chapter 8 provides a quantitative analysis of the market size and development potential of each region and its main countries and introduces the market development, future development prospects, market space, and capacity of each country in the world.

Chapter 9 shares the main producing countries of In-Row Coolant Distribution Units (CDU), their output value, profit level, regional supply, production capacity layout, etc. from the supply side.

Chapter 10 introduces the basic situation of the main companies in the market in detail, including product sales revenue, sales volume, price, gross profit margin, market share, product introduction, recent development, etc.

Chapter 11 provides a quantitative analysis of the market size and development potential of each region in the next five years.

Chapter 12 provides a quantitative analysis of the market size and development potential of each market segment in the next five years.

Chapter 13 is the main points and conclusions of the report.

## Key Reasons to Buy this Report:

Access to date statistics compiled by our researchers. These provide you with historical and forecast data, which is analyzed to tell you why your market is set to change

This enables you to anticipate market changes to remain ahead of your competitors

You will be able to copy data from the Excel spreadsheet straight into your marketing plans, business presentations, or other strategic documents

The concise analysis, clear graph, and table format will enable you to pinpoint the information you require quickly

Provision of market value data for each segment and sub-segment

Indicates the region and segment that is expected to witness the fastest growth as well as to dominate the market

Analysis by geography highlighting the consumption of the product/service in the region as well as indicating the factors that are affecting the market within each region

Competitive landscape which incorporates the market ranking of the major players, along with new service/product launches, partnerships, business expansions, and acquisitions in the past five years of companies profiled

Extensive company profiles comprising of company overview, company insights, product benchmarking, and SWOT analysis for the major market players

The current as well as the future market outlook of the industry concerning recent developments which involve growth opportunities and drivers as well as challenges and restraints of both emerging as well as developed regions

Includes in-depth analysis of the market from various perspectives through Porter's five forces analysis

Provides insight into the market through Value Chain

Market dynamics scenario, along with growth opportunities of the market in the years to come

6-month post-sales analyst support

### **Customization of the Report**

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