

# Global Rack-mounted Full Liquid CDU Market Research Report 2026(Status and Outlook)

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## Abstracts

The 2025 U.S. tariff policies introduce profound uncertainty into the global economic landscape. This report critically examines the implications of recent tariff adjustments and international strategic countermeasures on Rack-mounted Full Liquid CDU competitive dynamics, regional economic interdependencies, and supply chain reconfigurations. The rack-mounted all-liquid CDU is a rack-level cooling distribution unit used in data center liquid cooling systems. It achieves efficient heat dissipation for high-power servers through all-liquid cooling, improves energy efficiency and reduces energy consumption. Global sales in 2024 will be approximately 28,000 units, with an average unit price of approximately US\$9,500. Upstream suppliers are mainly heat exchanger manufacturers, pump and valve manufacturers, and liquid cooling pipe material companies. Downstream customers are mainly hyperscale data center operators, cloud computing service providers, and high-performance computing equipment integrators. Rack-mounted all-liquid CDUs are becoming the standard heart of AI clusters. The challenge of high-power chips to heat dissipation limits has pushed air wall and cold plate solutions to their ceiling. However, all-liquid CDUs, with their compact rack form, precise flow distribution, and millisecond-level temperature control response, have opened up space for continued expansion in kilowatt-level cabinets. Leading server manufacturers package and deliver CDUs and cabinets together, lowering the integration threshold for data centers and moving liquid cooling from customization to standardization. The CDU supply chain has been subsequently pulled into the server cycle, and valves, pumps, and heat exchangers have been accelerated to be localized. The focus of competition has shifted from single-point heat dissipation efficiency to full-life cycle reliability, remote operation and maintenance algorithms, and carbon emission indicators. In the future, the leasing model of liquid-cooled cabinets will transform the value of CDUs from disposable equipment to continuous services charged by cooling capacity. Manufacturers who are the first to complete large-scale verification and master

secondary-side flow fingerprint technology will lock in the next round of AI infrastructure dividends.

The global Rack-mounted Full Liquid CDU market size was estimated at USD 266.0 million in 2025 and is projected to grow at a compound annual growth rate (CAGR) of 8.90% during the forecast period.

This report offers a comprehensive and in-depth analysis of the global Rack-mounted Full Liquid 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 Rack-mounted Full Liquid 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 Rack-mounted Full Liquid CDU market.

### **Global Rack-mounted Full Liquid 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  
Boyd  
DCX  
Kaori  
nVent  
Motivair  
Delta Electronics  
CoolIT Systems  
AMAX  
Rittal  
Envicool  
Beehe  
Yuandi

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

Rated Cooling Capacity: 35-70 KW  
Rated Cooling Capacity: 70-100 KW  
Rated Cooling Capacity: 100-120 KW  
Others

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

Data Centers  
Edge Node Deployment  
Old Computer Room Renovation  
Others

### **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 Rack-mounted Full Liquid CDU Market  
Overview of the regional outlook of the Rack-mounted Full Liquid 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 Rack-mounted Full Liquid 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 Rack-mounted Full Liquid 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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## Contents

### **1 RESEARCH METHODOLOGY AND STATISTICAL SCOPE**

- 1.1 Market Definition and Statistical Scope of Rack-mounted Full Liquid CDU
- 1.2 Key Market Segments
  - 1.2.1 Rack-mounted Full Liquid CDU Segment by Type
  - 1.2.2 Rack-mounted Full Liquid CDU Segment by Application
- 1.3 Methodology & Sources of Information
  - 1.3.1 Research Methodology
  - 1.3.2 Research Process
  - 1.3.3 Market Breakdown and Data Triangulation
  - 1.3.4 Base Year
  - 1.3.5 Report Assumptions & Caveats

### **2 RACK-MOUNTED FULL LIQUID CDU MARKET OVERVIEW**

- 2.1 Global Market Overview
  - 2.1.1 Global Rack-mounted Full Liquid CDU Market Size (M USD) Estimates and Forecasts (2020-2035)
  - 2.1.2 Global Rack-mounted Full Liquid CDU Sales Estimates and Forecasts (2020-2035)
- 2.2 Market Segment Executive Summary
- 2.3 Global Market Size by Region

### **3 RACK-MOUNTED FULL LIQUID CDU MARKET COMPETITIVE LANDSCAPE**

- 3.1 Company Assessment Quadrant
- 3.2 Global Rack-mounted Full Liquid CDU Product Life Cycle
- 3.3 Global Rack-mounted Full Liquid CDU Sales by Manufacturers (2020-2025)
- 3.4 Global Rack-mounted Full Liquid CDU Revenue Market Share by Manufacturers (2020-2025)
- 3.5 Rack-mounted Full Liquid CDU Market Share by Company Type (Tier 1, Tier 2, and Tier 3)
- 3.6 Global Rack-mounted Full Liquid CDU Average Price by Manufacturers (2020-2025)
- 3.7 Manufacturers? Manufacturing Sites, Areas Served, and Product Types
- 3.8 Rack-mounted Full Liquid CDU Market Competitive Situation and Trends
  - 3.8.1 Rack-mounted Full Liquid CDU Market Concentration Rate
  - 3.8.2 Global 5 and 10 Largest Rack-mounted Full Liquid CDU Players Market Share

by Revenue

3.8.3 Mergers & Acquisitions, Expansion

## **4 RACK-MOUNTED FULL LIQUID CDU INDUSTRY CHAIN ANALYSIS**

4.1 Rack-mounted Full Liquid CDU Industry Chain Analysis

4.2 Market Overview of Key Raw Materials

4.3 Midstream Market Analysis

4.4 Downstream Customer Analysis

## **5 THE DEVELOPMENT AND DYNAMICS OF RACK-MOUNTED FULL LIQUID CDU MARKET**

5.1 Key Development Trends

5.2 Driving Factors

5.3 Market Challenges

5.4 Industry News

5.4.1 New Product Developments

5.4.2 Mergers & Acquisitions

5.4.3 Expansions

5.4.4 Collaboration/Supply Contracts

5.5 PEST Analysis

5.5.1 Industry Policies Analysis

5.5.2 Economic Environment Analysis

5.5.3 Social Environment Analysis

5.5.4 Technological Environment Analysis

5.6 Global Rack-mounted Full Liquid CDU Market Porter's Five Forces Analysis

5.6.1 Global Trade Frictions

5.6.2 U.S. Tariff Policy ? April 2025

5.6.3 Global Trade Frictions and Their Impacts to Rack-mounted Full Liquid CDU Market

5.7 ESG Ratings of Leading Companies

## **6 RACK-MOUNTED FULL LIQUID CDU MARKET SEGMENTATION BY TYPE**

6.1 Evaluation Matrix of Segment Market Development Potential (Type)

6.2 Global Rack-mounted Full Liquid CDU Sales Market Share by Type (2020-2025)

6.3 Global Rack-mounted Full Liquid CDU Market Size by Type (2020-2025)

6.4 Global Rack-mounted Full Liquid CDU Price by Type (2020-2025)

## **7 RACK-MOUNTED FULL LIQUID CDU MARKET SEGMENTATION BY APPLICATION**

- 7.1 Evaluation Matrix of Segment Market Development Potential (Application)
- 7.2 Global Rack-mounted Full Liquid CDU Market Sales by Application (2020-2025)
- 7.3 Global Rack-mounted Full Liquid CDU Market Size (M USD) by Application (2020-2025)
- 7.4 Global Rack-mounted Full Liquid CDU Sales Growth Rate by Application (2020-2025)

## **8 RACK-MOUNTED FULL LIQUID CDU MARKET SALES BY REGION**

- 8.1 Global Rack-mounted Full Liquid CDU Sales by Region
  - 8.1.1 Global Rack-mounted Full Liquid CDU Sales by Region
  - 8.1.2 Global Rack-mounted Full Liquid CDU Sales Market Share by Region
- 8.2 Global Rack-mounted Full Liquid CDU Market Size by Region
  - 8.2.1 Global Rack-mounted Full Liquid CDU Market Size by Region
  - 8.2.2 Global Rack-mounted Full Liquid CDU Market Size by Region
- 8.3 North America
  - 8.3.1 North America Rack-mounted Full Liquid CDU Sales by Country
  - 8.3.2 North America Rack-mounted Full Liquid CDU Market Size by Country
  - 8.3.3 U.S. Market Overview
  - 8.3.4 Canada Market Overview
  - 8.3.5 Mexico Market Overview
- 8.4 Europe
  - 8.4.1 Europe Rack-mounted Full Liquid CDU Sales by Country
  - 8.4.2 Europe Rack-mounted Full Liquid CDU Market Size by Country
  - 8.4.3 Germany Market Overview
  - 8.4.4 France Market Overview
  - 8.4.5 U.K. Market Overview
  - 8.4.6 Italy Market Overview
  - 8.4.7 Spain Market Overview
- 8.5 Asia Pacific
  - 8.5.1 Asia Pacific Rack-mounted Full Liquid CDU Sales by Region
  - 8.5.2 Asia Pacific Rack-mounted Full Liquid CDU Market Size by Region
  - 8.5.3 China Market Overview
  - 8.5.4 Japan Market Overview
  - 8.5.5 South Korea Market Overview

- 8.5.6 India Market Overview
- 8.5.7 Southeast Asia Market Overview
- 8.6 South America
  - 8.6.1 South America Rack-mounted Full Liquid CDU Sales by Country
  - 8.6.2 South America Rack-mounted Full Liquid CDU Market Size by Country
  - 8.6.3 Brazil Market Overview
  - 8.6.4 Argentina Market Overview
  - 8.6.5 Columbia Market Overview
- 8.7 Middle East and Africa
  - 8.7.1 Middle East and Africa Rack-mounted Full Liquid CDU Sales by Region
  - 8.7.2 Middle East and Africa Rack-mounted Full Liquid CDU Market Size by Region
  - 8.7.3 Saudi Arabia Market Overview
  - 8.7.4 UAE Market Overview
  - 8.7.5 Egypt Market Overview
  - 8.7.6 Nigeria Market Overview
  - 8.7.7 South Africa Market Overview

## **9 RACK-MOUNTED FULL LIQUID CDU MARKET PRODUCTION BY REGION**

- 9.1 Global Production of Rack-mounted Full Liquid CDU by Region(2020-2025)
- 9.2 Global Rack-mounted Full Liquid CDU Revenue Market Share by Region (2020-2025)
- 9.3 Global Rack-mounted Full Liquid CDU Production, Revenue, Price and Gross Margin (2020-2025)
- 9.4 North America Rack-mounted Full Liquid CDU Production
  - 9.4.1 North America Rack-mounted Full Liquid CDU Production Growth Rate (2020-2025)
  - 9.4.2 North America Rack-mounted Full Liquid CDU Production, Revenue, Price and Gross Margin (2020-2025)
- 9.5 Europe Rack-mounted Full Liquid CDU Production
  - 9.5.1 Europe Rack-mounted Full Liquid CDU Production Growth Rate (2020-2025)
  - 9.5.2 Europe Rack-mounted Full Liquid CDU Production, Revenue, Price and Gross Margin (2020-2025)
- 9.6 Japan Rack-mounted Full Liquid CDU Production (2020-2025)
  - 9.6.1 Japan Rack-mounted Full Liquid CDU Production Growth Rate (2020-2025)
  - 9.6.2 Japan Rack-mounted Full Liquid CDU Production, Revenue, Price and Gross Margin (2020-2025)
- 9.7 China Rack-mounted Full Liquid CDU Production (2020-2025)
  - 9.7.1 China Rack-mounted Full Liquid CDU Production Growth Rate (2020-2025)

9.7.2 China Rack-mounted Full Liquid CDU Production, Revenue, Price and Gross Margin (2020-2025)

## **10 KEY COMPANIES PROFILE**

### 10.1 Vertiv

10.1.1 Vertiv Basic Information

10.1.2 Vertiv Rack-mounted Full Liquid CDU Product Overview

10.1.3 Vertiv Rack-mounted Full Liquid CDU Product Market Performance

10.1.4 Vertiv Business Overview

10.1.5 Vertiv SWOT Analysis

10.1.6 Vertiv Recent Developments

### 10.2 Boyd

10.2.1 Boyd Basic Information

10.2.2 Boyd Rack-mounted Full Liquid CDU Product Overview

10.2.3 Boyd Rack-mounted Full Liquid CDU Product Market Performance

10.2.4 Boyd Business Overview

10.2.5 Boyd SWOT Analysis

10.2.6 Boyd Recent Developments

### 10.3 DCX

10.3.1 DCX Basic Information

10.3.2 DCX Rack-mounted Full Liquid CDU Product Overview

10.3.3 DCX Rack-mounted Full Liquid CDU Product Market Performance

10.3.4 DCX Business Overview

10.3.5 DCX SWOT Analysis

10.3.6 DCX Recent Developments

### 10.4 Kaori

10.4.1 Kaori Basic Information

10.4.2 Kaori Rack-mounted Full Liquid CDU Product Overview

10.4.3 Kaori Rack-mounted Full Liquid CDU Product Market Performance

10.4.4 Kaori Business Overview

10.4.5 Kaori Recent Developments

### 10.5 nVent

10.5.1 nVent Basic Information

10.5.2 nVent Rack-mounted Full Liquid CDU Product Overview

10.5.3 nVent Rack-mounted Full Liquid CDU Product Market Performance

10.5.4 nVent Business Overview

10.5.5 nVent Recent Developments

### 10.6 Motivair

- 10.6.1 Motivair Basic Information
- 10.6.2 Motivair Rack-mounted Full Liquid CDU Product Overview
- 10.6.3 Motivair Rack-mounted Full Liquid CDU Product Market Performance
- 10.6.4 Motivair Business Overview
- 10.6.5 Motivair Recent Developments
- 10.7 Delta Electronics
  - 10.7.1 Delta Electronics Basic Information
  - 10.7.2 Delta Electronics Rack-mounted Full Liquid CDU Product Overview
  - 10.7.3 Delta Electronics Rack-mounted Full Liquid CDU Product Market Performance
  - 10.7.4 Delta Electronics Business Overview
  - 10.7.5 Delta Electronics Recent Developments
- 10.8 CoolIT Systems
  - 10.8.1 CoolIT Systems Basic Information
  - 10.8.2 CoolIT Systems Rack-mounted Full Liquid CDU Product Overview
  - 10.8.3 CoolIT Systems Rack-mounted Full Liquid CDU Product Market Performance
  - 10.8.4 CoolIT Systems Business Overview
  - 10.8.5 CoolIT Systems Recent Developments
- 10.9 AMAX
  - 10.9.1 AMAX Basic Information
  - 10.9.2 AMAX Rack-mounted Full Liquid CDU Product Overview
  - 10.9.3 AMAX Rack-mounted Full Liquid CDU Product Market Performance
  - 10.9.4 AMAX Business Overview
  - 10.9.5 AMAX Recent Developments
- 10.10 Rittal
  - 10.10.1 Rittal Basic Information
  - 10.10.2 Rittal Rack-mounted Full Liquid CDU Product Overview
  - 10.10.3 Rittal Rack-mounted Full Liquid CDU Product Market Performance
  - 10.10.4 Rittal Business Overview
  - 10.10.5 Rittal Recent Developments
- 10.11 Envicool
  - 10.11.1 Envicool Basic Information
  - 10.11.2 Envicool Rack-mounted Full Liquid CDU Product Overview
  - 10.11.3 Envicool Rack-mounted Full Liquid CDU Product Market Performance
  - 10.11.4 Envicool Business Overview
  - 10.11.5 Envicool Recent Developments
- 10.12 Beehe
  - 10.12.1 Beehe Basic Information
  - 10.12.2 Beehe Rack-mounted Full Liquid CDU Product Overview
  - 10.12.3 Beehe Rack-mounted Full Liquid CDU Product Market Performance

- 10.12.4 Beehe Business Overview
- 10.12.5 Beehe Recent Developments
- 10.13 Yuandi
  - 10.13.1 Yuandi Basic Information
  - 10.13.2 Yuandi Rack-mounted Full Liquid CDU Product Overview
  - 10.13.3 Yuandi Rack-mounted Full Liquid CDU Product Market Performance
  - 10.13.4 Yuandi Business Overview
  - 10.13.5 Yuandi Recent Developments

## **11 RACK-MOUNTED FULL LIQUID CDU MARKET FORECAST BY REGION**

- 11.1 Global Rack-mounted Full Liquid CDU Market Size Forecast
- 11.2 Global Rack-mounted Full Liquid CDU Market Forecast by Region
  - 11.2.1 North America Market Size Forecast by Country
  - 11.2.2 Europe Rack-mounted Full Liquid CDU Market Size Forecast by Country
  - 11.2.3 Asia Pacific Rack-mounted Full Liquid CDU Market Size Forecast by Region
  - 11.2.4 South America Rack-mounted Full Liquid CDU Market Size Forecast by Country
  - 11.2.5 Middle East and Africa Forecasted Sales of Rack-mounted Full Liquid CDU by Country

## **12 FORECAST MARKET BY TYPE AND BY APPLICATION (2026-2035)**

- 12.1 Global Rack-mounted Full Liquid CDU Market Forecast by Type (2026-2035)
  - 12.1.1 Global Forecasted Sales of Rack-mounted Full Liquid CDU by Type (2026-2035)
  - 12.1.2 Global Rack-mounted Full Liquid CDU Market Size Forecast by Type (2026-2035)
  - 12.1.3 Global Forecasted Price of Rack-mounted Full Liquid CDU by Type (2026-2035)
- 12.2 Global Rack-mounted Full Liquid CDU Market Forecast by Application (2026-2035)
  - 12.2.1 Global Rack-mounted Full Liquid CDU Sales (K Units) Forecast by Application
  - 12.2.2 Global Rack-mounted Full Liquid CDU Market Size (M USD) Forecast by Application (2026-2035)

## **13 CONCLUSION AND KEY FINDINGS**

## List Of Tables

### LIST OF TABLES

- Table 1. Introduction of the Type
- Table 2. Introduction of the Application
- Table 3. Global Rack-mounted Full Liquid CDU Market Size by Type (M USD)
- Table 4. Global Rack-mounted Full Liquid CDU Market Size by Application
- Table 5. Rack-mounted Full Liquid CDU Market Size Comparison by Region (M USD)
- Table 6. Global Rack-mounted Full Liquid CDU Sales (K Units) by Manufacturers (2020-2025)
- Table 7. Global Rack-mounted Full Liquid CDU Sales Market Share by Manufacturers (2020-2025)
- Table 8. Global Rack-mounted Full Liquid CDU Revenue (M USD) by Manufacturers (2020-2025)
- Table 9. Global Rack-mounted Full Liquid CDU Revenue Share by Manufacturers (2020-2025)
- Table 10. Company Type (Tier 1, Tier 2, and Tier 3) & (based on the Revenue in Rack-mounted Full Liquid CDU as of 2025)
- Table 11. Global Market Rack-mounted Full Liquid CDU Average Price (USD/Unit) of Key Manufacturers (2020-2025)
- Table 12. Manufacturers? Manufacturing Sites, Areas Served
- Table 13. Manufacturers? Product Type
- Table 14. Global Rack-mounted Full Liquid CDU Manufacturers Market Concentration Ratio (CR5 and HHI)
- Table 15. Mergers & Acquisitions, Expansion Plans
- Table 16. Market Overview of Key Raw Materials
- Table 17. Midstream Market Analysis
- Table 18. Downstream Customer Analysis
- Table 19. Key Development Trends
- Table 20. Driving Factors
- Table 21. Rack-mounted Full Liquid CDU Market Challenges
- Table 22. Goldman Sachs' forecast real GDP growth rate for 2025-2026
- Table 23. S&P Global ' Forecast Real GDP Growth Rate For 2025-2027
- Table 24. World Bank ' Forecast Real GDP Growth Rate For 2025-2026
- Table 25. The Tariff Rates Imposed by the United States on Major Commodity Trading Countries
- Table 26. Global Rack-mounted Full Liquid CDU Sales by Type (K Units)
- Table 27. Global Rack-mounted Full Liquid CDU Market Size by Type (M USD)

Table 28. Global Rack-mounted Full Liquid CDU Sales (K Units) by Type (2020-2025)

Table 29. Global Rack-mounted Full Liquid CDU Sales Market Share by Type (2020-2025)

Table 30. Global Rack-mounted Full Liquid CDU Market Size (M USD) by Type (2020-2025)

Table 31. Global Rack-mounted Full Liquid CDU Market Share by Type (2020-2025)

Table 32. Global Rack-mounted Full Liquid CDU Price (USD/Unit) by Type (2020-2025)

Table 33. Global Rack-mounted Full Liquid CDU Sales (K Units) by Application

Table 34. Global Rack-mounted Full Liquid CDU Market Size by Application

Table 35. Global Rack-mounted Full Liquid CDU Sales by Application (2020-2025) & (K Units)

Table 36. Global Rack-mounted Full Liquid CDU Sales Market Share by Application (2020-2025)

Table 37. Global Rack-mounted Full Liquid CDU Market Size by Application (2020-2025) & (M USD)

Table 38. Global Rack-mounted Full Liquid CDU Market Share by Application (2020-2025)

Table 39. Global Rack-mounted Full Liquid CDU Sales Growth Rate by Application (2020-2025)

Table 40. Global Rack-mounted Full Liquid CDU Sales by Region (2020-2025) & (K Units)

Table 41. Global Rack-mounted Full Liquid CDU Sales Market Share by Region (2020-2025)

Table 42. Global Rack-mounted Full Liquid CDU Market Size by Region (2020-2025) & (M USD)

Table 43. Global Rack-mounted Full Liquid CDU Market Size by Region (2020-2025)

Table 44. North America Rack-mounted Full Liquid CDU Sales by Country (2020-2025) & (K Units)

Table 45. North America Rack-mounted Full Liquid CDU Market Size by Country (2020-2025) & (M USD)

Table 46. Europe Rack-mounted Full Liquid CDU Sales by Country (2020-2025) & (K Units)

Table 47. Europe Rack-mounted Full Liquid CDU Market Size by Country (2020-2025) & (M USD)

Table 48. Asia Pacific Rack-mounted Full Liquid CDU Sales by Region (2020-2025) & (K Units)

Table 49. Asia Pacific Rack-mounted Full Liquid CDU Market Size by Region (2020-2025) & (M USD)

Table 50. South America Rack-mounted Full Liquid CDU Sales by Country (2020-2025)

& (K Units)

Table 51. South America Rack-mounted Full Liquid CDU Market Size by Country (2020-2025) & (M USD)

Table 52. Middle East and Africa Rack-mounted Full Liquid CDU Sales by Region (2020-2025) & (K Units)

Table 53. Middle East and Africa Rack-mounted Full Liquid CDU Market Size by Region (2020-2025) & (M USD)

Table 54. Global Rack-mounted Full Liquid CDU Production (K Units) by Region(2020-2025)

Table 55. Global Rack-mounted Full Liquid CDU Revenue (US\$ Million) by Region (2020-2025)

Table 56. Global Rack-mounted Full Liquid CDU Revenue Market Share by Region (2020-2025)

Table 57. Global Rack-mounted Full Liquid CDU Production (K Units), Revenue (US\$ Million), Price (USD/Unit) and Gross Margin (2020-2025)

Table 58. North America Rack-mounted Full Liquid CDU Production (K Units), Revenue (US\$ Million), Price (USD/Unit) and Gross Margin (2020-2025)

Table 59. Europe Rack-mounted Full Liquid CDU Production (K Units), Revenue (US\$ Million), Price (USD/Unit) and Gross Margin (2020-2025)

Table 60. Japan Rack-mounted Full Liquid CDU Production (K Units), Revenue (US\$ Million), Price (USD/Unit) and Gross Margin (2020-2025)

Table 61. China Rack-mounted Full Liquid CDU Production (K Units), Revenue (US\$ Million), Price (USD/Unit) and Gross Margin (2020-2025)

Table 62. Vertiv Basic Information

Table 63. Vertiv Rack-mounted Full Liquid CDU Product Overview

Table 64. Vertiv Rack-mounted Full Liquid CDU Sales (K Units), Revenue (M USD), Price (USD/Unit) and Gross Margin (2020-2025)

Table 65. Vertiv Business Overview

Table 66. Vertiv SWOT Analysis

Table 67. Vertiv Recent Developments

Table 68. Boyd Basic Information

Table 69. Boyd Rack-mounted Full Liquid CDU Product Overview

Table 70. Boyd Rack-mounted Full Liquid CDU Sales (K Units), Revenue (M USD), Price (USD/Unit) and Gross Margin (2020-2025)

Table 71. Boyd Business Overview

Table 72. Boyd SWOT Analysis

Table 73. Boyd Recent Developments

Table 74. DCX Basic Information

Table 75. DCX Rack-mounted Full Liquid CDU Product Overview

- Table 76. DCX Rack-mounted Full Liquid CDU Sales (K Units), Revenue (M USD), Price (USD/Unit) and Gross Margin (2020-2025)
- Table 77. DCX Business Overview
- Table 78. DCX SWOT Analysis
- Table 79. DCX Recent Developments
- Table 80. Kaori Basic Information
- Table 81. Kaori Rack-mounted Full Liquid CDU Product Overview
- Table 82. Kaori Rack-mounted Full Liquid CDU Sales (K Units), Revenue (M USD), Price (USD/Unit) and Gross Margin (2020-2025)
- Table 83. Kaori Business Overview
- Table 84. Kaori Recent Developments
- Table 85. nVent Basic Information
- Table 86. nVent Rack-mounted Full Liquid CDU Product Overview
- Table 87. nVent Rack-mounted Full Liquid CDU Sales (K Units), Revenue (M USD), Price (USD/Unit) and Gross Margin (2020-2025)
- Table 88. nVent Business Overview
- Table 89. nVent Recent Developments
- Table 90. Motivair Basic Information
- Table 91. Motivair Rack-mounted Full Liquid CDU Product Overview
- Table 92. Motivair Rack-mounted Full Liquid CDU Sales (K Units), Revenue (M USD), Price (USD/Unit) and Gross Margin (2020-2025)
- Table 93. Motivair Business Overview
- Table 94. Motivair Recent Developments
- Table 95. Delta Electronics Basic Information
- Table 96. Delta Electronics Rack-mounted Full Liquid CDU Product Overview
- Table 97. Delta Electronics Rack-mounted Full Liquid CDU Sales (K Units), Revenue (M USD), Price (USD/Unit) and Gross Margin (2020-2025)
- Table 98. Delta Electronics Business Overview
- Table 99. Delta Electronics Recent Developments
- Table 100. CoolIT Systems Basic Information
- Table 101. CoolIT Systems Rack-mounted Full Liquid CDU Product Overview
- Table 102. CoolIT Systems Rack-mounted Full Liquid CDU Sales (K Units), Revenue (M USD), Price (USD/Unit) and Gross Margin (2020-2025)
- Table 103. CoolIT Systems Business Overview
- Table 104. CoolIT Systems Recent Developments
- Table 105. AMAX Basic Information
- Table 106. AMAX Rack-mounted Full Liquid CDU Product Overview
- Table 107. AMAX Rack-mounted Full Liquid CDU Sales (K Units), Revenue (M USD), Price (USD/Unit) and Gross Margin (2020-2025)

Table 108. AMAX Business Overview

Table 109. AMAX Recent Developments

Table 110. Rittal Basic Information

Table 111. Rittal Rack-mounted Full Liquid CDU Product Overview

Table 112. Rittal Rack-mounted Full Liquid CDU Sales (K Units), Revenue (M USD), Price (USD/Unit) and Gross Margin (2020-2025)

Table 113. Rittal Business Overview

Table 114. Rittal Recent Developments

Table 115. Envicool Basic Information

Table 116. Envicool Rack-mounted Full Liquid CDU Product Overview

Table 117. Envicool Rack-mounted Full Liquid CDU Sales (K Units), Revenue (M USD), Price (USD/Unit) and Gross Margin (2020-2025)

Table 118. Envicool Business Overview

Table 119. Envicool Recent Developments

Table 120. Beehe Basic Information

Table 121. Beehe Rack-mounted Full Liquid CDU Product Overview

Table 122. Beehe Rack-mounted Full Liquid CDU Sales (K Units), Revenue (M USD), Price (USD/Unit) and Gross Margin (2020-2025)

Table 123. Beehe Business Overview

Table 124. Beehe Recent Developments

Table 125. Yuandi Basic Information

Table 126. Yuandi Rack-mounted Full Liquid CDU Product Overview

Table 127. Yuandi Rack-mounted Full Liquid CDU Sales (K Units), Revenue (M USD), Price (USD/Unit) and Gross Margin (2020-2025)

Table 128. Yuandi Business Overview

Table 129. Yuandi Recent Developments

Table 130. Global Rack-mounted Full Liquid CDU Sales Forecast by Region (2026-2035) & (K Units)

Table 131. Global Rack-mounted Full Liquid CDU Market Size Forecast by Region (2026-2035) & (M USD)

Table 132. North America Rack-mounted Full Liquid CDU Sales Forecast by Country (2026-2035) & (K Units)

Table 133. North America Rack-mounted Full Liquid CDU Market Size Forecast by Country (2026-2035) & (M USD)

Table 134. Europe Rack-mounted Full Liquid CDU Sales Forecast by Country (2026-2035) & (K Units)

Table 135. Europe Rack-mounted Full Liquid CDU Market Size Forecast by Country (2026-2035) & (M USD)

Table 136. Asia Pacific Rack-mounted Full Liquid CDU Sales Forecast by Region

(2026-2035) & (K Units)

Table 137. Asia Pacific Rack-mounted Full Liquid CDU Market Size Forecast by Region (2026-2035) & (M USD)

Table 138. South America Rack-mounted Full Liquid CDU Sales Forecast by Country (2026-2035) & (K Units)

Table 139. South America Rack-mounted Full Liquid CDU Market Size Forecast by Country (2026-2035) & (M USD)

Table 140. Middle East and Africa Rack-mounted Full Liquid CDU Sales Forecast by Country (2026-2035) & (Units)

Table 141. Middle East and Africa Rack-mounted Full Liquid CDU Market Size Forecast by Country (2026-2035) & (M USD)

Table 142. Global Rack-mounted Full Liquid CDU Sales Forecast by Type (2026-2035) & (K Units)

Table 143. Global Rack-mounted Full Liquid CDU Market Size Forecast by Type (2026-2035) & (M USD)

Table 144. Global Rack-mounted Full Liquid CDU Price Forecast by Type (2026-2035) & (USD/Unit)

Table 145. Global Rack-mounted Full Liquid CDU Sales (K Units) Forecast by Application (2026-2035)

Table 146. Global Rack-mounted Full Liquid CDU Market Size Forecast by Application (2026-2035) & (M USD)

## List Of Figures

### LIST OF FIGURES

- Figure 1. Product Picture of Rack-mounted Full Liquid CDU
- Figure 2. Data Triangulation
- Figure 3. Key Caveats
- Figure 4. Global Rack-mounted Full Liquid CDU Market Size (M USD), 2025-2035
- Figure 5. Global Rack-mounted Full Liquid CDU Market Size (M USD) (2020-2035)
- Figure 6. Global Rack-mounted Full Liquid CDU Sales (K Units) & (2020-2035)
- Figure 7. Evaluation Matrix of Segment Market Development Potential (Type)
- Figure 8. Evaluation Matrix of Segment Market Development Potential (Application)
- Figure 9. Evaluation Matrix of Regional Market Development Potential
- Figure 10. Rack-mounted Full Liquid CDU Market Size by Country (M USD)
- Figure 11. Company Assessment Quadrant
- Figure 12. Global Rack-mounted Full Liquid CDU Product Life Cycle
- Figure 13. Rack-mounted Full Liquid CDU Sales Share by Manufacturers in 2025
- Figure 14. Global Rack-mounted Full Liquid CDU Revenue Share by Manufacturers in 2025
- Figure 15. Rack-mounted Full Liquid CDU Market Share by Company Type (Tier 1, Tier 2 and Tier 3): 2025
- Figure 16. Global Market Rack-mounted Full Liquid CDU Average Price (USD/Unit) of Key Manufacturers in 2025
- Figure 17. The Global 5 and 10 Largest Players: Market Share by Rack-mounted Full Liquid CDU Revenue in 2025
- Figure 18. Industry Chain Map of Rack-mounted Full Liquid CDU
- Figure 19. Global Rack-mounted Full Liquid CDU Market PEST Analysis
- Figure 20. Global Rack-mounted Full Liquid CDU Market Porter's Five Forces Analysis
- Figure 21. Global Merchandise Trade as a Percentage Of GDP
- Figure 22. US - Imports of Goods by Country
- Figure 23. China Exports by Country
- Figure 24. ESG Rating Distribution of The Leading Company Compared With Its Peers
- Figure 25. Evaluation Matrix of Segment Market Development Potential (Type)
- Figure 26. Global Rack-mounted Full Liquid CDU Market Share by Type
- Figure 27. Sales Market Share of Rack-mounted Full Liquid CDU by Type (2020-2025)
- Figure 28. Sales Market Share of Rack-mounted Full Liquid CDU by Type in 2025
- Figure 29. Market Share of Rack-mounted Full Liquid CDU by Type (2020-2025)
- Figure 30. Market Share of Rack-mounted Full Liquid CDU by Type in 2025
- Figure 31. Evaluation Matrix of Segment Market Development Potential (Application)

Figure 32. Global Rack-mounted Full Liquid CDU Market Share by Application

Figure 33. Global Rack-mounted Full Liquid CDU Sales Market Share by Application (2020-2025)

Figure 34. Global Rack-mounted Full Liquid CDU Sales Market Share by Application in 2025

Figure 35. Global Rack-mounted Full Liquid CDU Market Share by Application (2020-2025)

Figure 36. Global Rack-mounted Full Liquid CDU Market Share by Application in 2025

Figure 37. Global Rack-mounted Full Liquid CDU Sales Growth Rate by Application (2020-2025)

Figure 38. Global Rack-mounted Full Liquid CDU Sales Market Share by Region (2020-2025)

Figure 39. Global Rack-mounted Full Liquid CDU Market Size by Region (2020-2025)

Figure 40. North America Rack-mounted Full Liquid CDU Sales and Growth Rate (2020-2025) & (K Units)

Figure 41. North America Rack-mounted Full Liquid CDU Sales and Growth Rate (2020-2025) & (K Units)

Figure 42. North America Rack-mounted Full Liquid CDU Sales Market Share by Country in 2024

Figure 43. North America Rack-mounted Full Liquid CDU Market Size and Growth Rate (2020-2025) & (M USD)

Figure 44. North America Rack-mounted Full Liquid CDU Market Size by Country in 2024

Figure 45. U.S. Rack-mounted Full Liquid CDU Sales and Growth Rate (2020-2025) & (K Units)

Figure 46. U.S. Rack-mounted Full Liquid CDU Market Size and Growth Rate (2020-2025) & (M USD)

Figure 47. Canada Rack-mounted Full Liquid CDU Sales (K Units) and Growth Rate (2020-2025)

Figure 48. Canada Rack-mounted Full Liquid CDU Market Size (M USD) and Growth Rate (2020-2025)

Figure 49. Mexico Rack-mounted Full Liquid CDU Sales (Units) and Growth Rate (2020-2025)

Figure 50. Mexico Rack-mounted Full Liquid CDU Market Size (Units) and Growth Rate (2020-2025)

Figure 51. Europe Rack-mounted Full Liquid CDU Sales and Growth Rate (2020-2025) & (K Units)

Figure 52. Europe Rack-mounted Full Liquid CDU Sales Market Share by Country in 2024

Figure 53. Europe Rack-mounted Full Liquid CDU Market Size and Growth Rate (2020-2025) & (M USD)

Figure 54. Europe Rack-mounted Full Liquid CDU Market Size by Country in 2024

Figure 55. Germany Rack-mounted Full Liquid CDU Sales and Growth Rate (2020-2025) & (K Units)

Figure 56. Germany Rack-mounted Full Liquid CDU Market Size and Growth Rate (2020-2025) & (M USD)

Figure 57. France Rack-mounted Full Liquid CDU Sales and Growth Rate (2020-2025) & (K Units)

Figure 58. France Rack-mounted Full Liquid CDU Market Size and Growth Rate (2020-2025) & (M USD)

Figure 59. U.K. Rack-mounted Full Liquid CDU Sales and Growth Rate (2020-2025) & (K Units)

Figure 60. U.K. Rack-mounted Full Liquid CDU Market Size and Growth Rate (2020-2025) & (M USD)

Figure 61. Italy Rack-mounted Full Liquid CDU Sales and Growth Rate (2020-2025) & (K Units)

Figure 62. Italy Rack-mounted Full Liquid CDU Market Size and Growth Rate (2020-2025) & (M USD)

Figure 63. Spain Rack-mounted Full Liquid CDU Sales and Growth Rate (2020-2025) & (K Units)

Figure 64. Spain Rack-mounted Full Liquid CDU Market Size and Growth Rate (2020-2025) & (M USD)

Figure 65. Asia Pacific Rack-mounted Full Liquid CDU Sales and Growth Rate (K Units)

Figure 66. Asia Pacific Rack-mounted Full Liquid CDU Sales Market Share by Region in 2024

Figure 67. Asia Pacific Rack-mounted Full Liquid CDU Market Size by Region in 2024

Figure 68. China Rack-mounted Full Liquid CDU Sales and Growth Rate (2020-2025) & (K Units)

Figure 69. China Rack-mounted Full Liquid CDU Market Size and Growth Rate (2020-2025) & (M USD)

Figure 70. Japan Rack-mounted Full Liquid CDU Sales and Growth Rate (2020-2025) & (K Units)

Figure 71. Japan Rack-mounted Full Liquid CDU Market Size and Growth Rate (2020-2025) & (M USD)

Figure 72. South Korea Rack-mounted Full Liquid CDU Sales and Growth Rate (2020-2025) & (K Units)

Figure 73. South Korea Rack-mounted Full Liquid CDU Market Size and Growth Rate (2020-2025) & (M USD)

Figure 74. India Rack-mounted Full Liquid CDU Sales and Growth Rate (2020-2025) & (K Units)

Figure 75. India Rack-mounted Full Liquid CDU Market Size and Growth Rate (2020-2025) & (M USD)

Figure 76. Southeast Asia Rack-mounted Full Liquid CDU Sales and Growth Rate (2020-2025) & (K Units)

Figure 77. Southeast Asia Rack-mounted Full Liquid CDU Market Size and Growth Rate (2020-2025) & (M USD)

Figure 78. South America Rack-mounted Full Liquid CDU Sales and Growth Rate (K Units)

Figure 79. South America Rack-mounted Full Liquid CDU Sales Market Share by Country in 2024

Figure 80. South America Rack-mounted Full Liquid CDU Market Size and Growth Rate (M USD)

Figure 81. South America Rack-mounted Full Liquid CDU Market Size by Country in 2024

Figure 82. Brazil Rack-mounted Full Liquid CDU Sales and Growth Rate (2020-2025) & (K Units)

Figure 83. Brazil Rack-mounted Full Liquid CDU Market Size and Growth Rate (2020-2025) & (M USD)

Figure 84. Argentina Rack-mounted Full Liquid CDU Sales and Growth Rate (2020-2025) & (K Units)

Figure 85. Argentina Rack-mounted Full Liquid CDU Market Size and Growth Rate (2020-2025) & (M USD)

Figure 86. Columbia Rack-mounted Full Liquid CDU Sales and Growth Rate (2020-2025) & (K Units)

Figure 87. Columbia Rack-mounted Full Liquid CDU Market Size and Growth Rate (2020-2025) & (M USD)

Figure 88. Middle East and Africa Rack-mounted Full Liquid CDU Sales and Growth Rate (K Units)

Figure 89. Middle East and Africa Rack-mounted Full Liquid CDU Sales Market Share by Region in 2024

Figure 90. Middle East and Africa Rack-mounted Full Liquid CDU Market Size and Growth Rate (M USD)

Figure 91. Middle East and Africa Rack-mounted Full Liquid CDU Market Size by Region in 2024

Figure 92. Saudi Arabia Rack-mounted Full Liquid CDU Sales and Growth Rate (2020-2025) & (K Units)

Figure 93. Saudi Arabia Rack-mounted Full Liquid CDU Market Size and Growth Rate

(2020-2025) & (M USD)

Figure 94. UAE Rack-mounted Full Liquid CDU Sales and Growth Rate (2020-2025) & (K Units)

Figure 95. UAE Rack-mounted Full Liquid CDU Market Size and Growth Rate (2020-2025) & (M USD)

Figure 96. Egypt Rack-mounted Full Liquid CDU Sales and Growth Rate (2020-2025) & (K Units)

Figure 97. Egypt Rack-mounted Full Liquid CDU Market Size and Growth Rate (2020-2025) & (M USD)

Figure 98. Nigeria Rack-mounted Full Liquid CDU Sales and Growth Rate (2020-2025) & (K Units)

Figure 99. Nigeria Rack-mounted Full Liquid CDU Market Size and Growth Rate (2020-2025) & (M USD)

Figure 100. South Africa Rack-mounted Full Liquid CDU Sales and Growth Rate (2020-2025) & (K Units)

Figure 101. South Africa Rack-mounted Full Liquid CDU Market Size and Growth Rate (2020-2025) & (M USD)

Figure 102. Global Rack-mounted Full Liquid CDU Production Market Share by Region (2020-2025)

Figure 103. North America Rack-mounted Full Liquid CDU Production (K Units) Growth Rate (2020-2025)

Figure 104. Europe Rack-mounted Full Liquid CDU Production (K Units) Growth Rate (2020-2025)

Figure 105. Japan Rack-mounted Full Liquid CDU Production (K Units) Growth Rate (2020-2025)

Figure 106. China Rack-mounted Full Liquid CDU Production (K Units) Growth Rate (2020-2025)

Figure 107. Global Rack-mounted Full Liquid CDU Sales Forecast by Volume (2020-2035) & (K Units)

Figure 108. Global Rack-mounted Full Liquid CDU Market Size Forecast by Value (2020-2035) & (M USD)

Figure 109. Global Rack-mounted Full Liquid CDU Sales Market Share Forecast by Type (2026-2035)

Figure 110. Global Rack-mounted Full Liquid CDU Market Share Forecast by Type (2026-2035)

Figure 111. Global Rack-mounted Full Liquid CDU Sales Forecast by Application (2026-2035)

Figure 112. Global Rack-mounted Full Liquid CDU Market Share Forecast by Application (2026-2035)

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