

Global Coolant Distribution Units for AI Training and HPC Data Centers Market 2026 by Manufacturers, Regions, Type and Application, Forecast to 2032

<https://marketpublishers.com/r/G4FFC89515C5EN.html>

Date: July 2026

Pages: 135

Price: US\$ 3,480.00 (Single User License)

ID: G4FFC89515C5EN

Abstracts

According to our (Global Info Research) latest study, the global Coolant Distribution Units for AI Training and HPC Data Centers market size was valued at US\$ 1111 million in 2025 and is forecast to a readjusted size of US\$ 5560 million by 2032 with a CAGR of 24.8% during review period.

Coolant Distribution Units for AI and HPC data centers are specialised liquid-cooling infrastructure modules designed to bridge the facility cooling loop and the IT-side technology cooling loop in high-density computing environments. They perform heat exchange, hydraulic separation, coolant distribution, flow regulation, pressure control, temperature management, filtration, reservoir management, leak detection and supervisory control for direct-to-chip cold plates, rear-door heat exchangers, liquid-cooled racks and selected immersion-cooling interfaces. In practical deployments, CDUs may be delivered as in-rack, in-row, centralised, modular or megawatt-scale platforms, with liquid-to-liquid and liquid-to-air designs representing the most common architectures. Their value lies in maintaining stable coolant quality and operating conditions for CPUs, GPUs, accelerators and ASIC clusters running under sustained high thermal loads. Typical system pricing can range from tens of thousands of US dollars for compact rack-level units to several hundred thousand or more than one million US dollars for high-capacity, redundant, megawatt-scale systems, depending on cooling capacity, redundancy, control sophistication, fluid compatibility, cleanliness requirements, qualification standards and integration scope.

Based on our research, the CDU market for AI and HPC data centers should not be interpreted as a conventional HVAC sub-segment. Its strategic role is to act as the hydraulic and thermal control layer between facility cooling and IT-side liquid cooling. As

rack densities move beyond the practical limits of air cooling, CDUs become an enabling infrastructure layer for direct-to-chip cooling, rear-door heat exchangers and liquid-cooled rack deployments. The product is increasingly defined not only by nameplate cooling capacity, but also by pump redundancy, cleanliness control, approach temperature, telemetry, leak detection, controls integration, fluid compatibility and serviceability. Public product information from Vertiv, Rittal, STULZ and LiquidStack indicates that CDU platforms are now being designed for high-density AI and HPC environments rather than for isolated experimental deployments.

The global supply structure is becoming multi-layered. Data center infrastructure incumbents, specialist liquid-cooling companies, precision-cooling manufacturers and regional thermal-management players are all competing for position. Vertiv, Schneider Electric with Motivair, Eaton with Boyd Thermal, CoolIT, Delta and nVent form the most visible core group, while Rittal, STULZ, Airedale, Johnson Controls/Silent-Aire, LiquidStack and Envicool broaden the competitive field. Recent acquisitions involving Motivair, Boyd Thermal and CoolIT show that liquid-cooling capability has become a strategic asset for global industrial groups seeking exposure to AI infrastructure growth.

Demand is being pulled by three main customer groups: hyperscale AI factories, colocation and cloud operators upgrading high-density halls, and HPC or sovereign computing facilities. Customers are moving from equipment-level procurement to system-level qualification, requiring CDUs to be compatible with cold plates, rack manifolds, rear-door heat exchangers, facility water loops, power systems and monitoring platforms. This explains why the competitive advantage is shifting from basic thermal capacity toward validated architectures, deployment speed, controls, service networks and long-term reliability. The emergence of megawatt-scale CDU platforms from LiquidStack, Johnson Controls/Silent-Aire, Delta and LG confirms that the market is moving from rack-level retrofits toward large-scale liquid-cooled infrastructure blocks.

This report is a detailed and comprehensive analysis for global Coolant Distribution Units for AI Training and HPC Data Centers market. Both quantitative and qualitative analyses are presented by manufacturers, by region & country, by Heat Transfer Architecture and by Application. As the market is constantly changing, this report explores the competition, supply and demand trends, as well as key factors that contribute to its changing demands across many markets. Company profiles and product examples of selected competitors, along with market share estimates of some of the selected leaders for the year 2025, are provided.

Key Features:

Global Coolant Distribution Units for AI Training and HPC Data Centers market size and forecasts, in consumption value (\$ Million), sales quantity (Units), and average selling prices (US\$/Unit), 2021-2032

Global Coolant Distribution Units for AI Training and HPC Data Centers market size and forecasts by region and country, in consumption value (\$ Million), sales quantity (Units), and average selling prices (US\$/Unit), 2021-2032

Global Coolant Distribution Units for AI Training and HPC Data Centers market size and forecasts, by Heat Transfer Architecture and by Application, in consumption value (\$ Million), sales quantity (Units), and average selling prices (US\$/Unit), 2021-2032

Global Coolant Distribution Units for AI Training and HPC Data Centers market shares of main players, shipments in revenue (\$ Million), sales quantity (Units), and ASP (US\$/Unit), 2021-2026

The Primary Objectives in This Report Are:

- To determine the size of the total market opportunity of global and key countries

- To assess the growth potential for Coolant Distribution Units for AI Training and HPC Data Centers

- To forecast future growth in each product and end-use market

- To assess competitive factors affecting the marketplace

This report profiles key players in the global Coolant Distribution Units for AI Training and HPC Data Centers market based on the following parameters - company overview, sales quantity, revenue, price, gross margin, product portfolio, geographical presence, and key developments. Key companies covered as a part of this study include Vertiv Holdings Co, Schneider Electric Motivair, Eaton Boyd Thermal, CoolIT Systems, Delta Electronics, nVent Electric, Envicool, Rittal, Johnson Controls Silent-Aire, LiquidStack, etc.

This report also provides key insights about market drivers, restraints, opportunities, new product launches or approvals.

Market Segmentation

Coolant Distribution Units for AI Training and HPC Data Centers market is split by Heat Transfer Architecture and by Application. For the period 2021-2032, the growth among segments provides accurate calculations and forecasts for consumption value by Heat Transfer Architecture, and by Application in terms of volume and value. This analysis can help you expand your business by targeting qualified niche markets.

Market segment by Heat Transfer Architecture

Liquid-to-Liquid CDU

Liquid-to-Air CDU

Two-phase / Specialty-fluid CDU

Other

Market segment by Deployment Form Factor

In-Rack CDU

In-Row CDU

Centralized / Plant-room CDU

Modular / Containerized CDU

Market segment by Cooling Capacity Class

?100 kW

100?500 kW

500 kW?2 MW

>2 MW

Market segment by Served Cooling Endpoint

Direct-to-Chip Cold Plate

Rear Door Heat Exchanger

Liquid-cooled Rack / Manifold

Immersion Interface

Other

Market segment by Application

AI Training Cluster / AI Factory

HPC / Supercomputing

Hyperscale Cloud / Colocation

Enterprise / Edge High-density IT

Other

Major players covered

Vertiv Holdings Co

Schneider Electric Motivair

Eaton Boyd Thermal

CoolIT Systems

Delta Electronics

nVent Electric

Envicool

Rittal

Johnson Controls Silent-Aire

LiquidStack

STULZ

LG Electronics

Airedale by Modine

Daikin

Asetek

Childdyne

DCX Liquid Cooling Systems

Market segment by region, regional analysis covers

North America (United States, Canada, and Mexico)

Europe (Germany, France, United Kingdom, Russia, Italy, and Rest of Europe)

Asia-Pacific (China, Japan, Korea, India, Southeast Asia, and Australia)

South America (Brazil, Argentina, Colombia, and Rest of South America)

Middle East & Africa (Saudi Arabia, UAE, Egypt, South Africa, and Rest of Middle East & Africa)

The content of the study subjects, includes a total of 15 chapters:

Chapter 1, to describe Coolant Distribution Units for AI Training and HPC Data Centers product scope, market overview, market estimation caveats and base year.

Chapter 2, to profile the top manufacturers of Coolant Distribution Units for AI Training and HPC Data Centers, with price, sales quantity, revenue, and global market share of Coolant Distribution Units for AI Training and HPC Data Centers from 2021 to 2026.

Chapter 3, the Coolant Distribution Units for AI Training and HPC Data Centers competitive situation, sales quantity, revenue, and global market share of top manufacturers are analyzed emphatically by landscape contrast.

Chapter 4, the Coolant Distribution Units for AI Training and HPC Data Centers breakdown data are shown at the regional level, to show the sales quantity, consumption value, and growth by regions, from 2021 to 2032.

Chapter 5 and 6, to segment the sales by Heat Transfer Architecture and by Application, with sales market share and growth rate by Heat Transfer Architecture, by Application, from 2021 to 2032.

Chapter 7, 8, 9, 10 and 11, to break the sales data at the country level, with sales quantity, consumption value, and market share for key countries in the world, from 2021 to 2026. and Coolant Distribution Units for AI Training and HPC Data Centers market forecast, by regions, by Heat Transfer Architecture, and by Application, with sales and revenue, from 2027 to 2032.

Chapter 12, market dynamics, drivers, restraints, trends, and Porters Five Forces analysis.

Chapter 13, the key raw materials and key suppliers, and industry chain of Coolant Distribution Units for AI Training and HPC Data Centers.

Chapter 14 and 15, to describe Coolant Distribution Units for AI Training and HPC Data Centers sales channel, distributors, customers, research findings and

conclusion.

Contents

1 MARKET OVERVIEW

1.1 Product Overview and Scope

1.2 Market Estimation Caveats and Base Year

1.3 Market Analysis by Heat Transfer Architecture

1.3.1 Overview: Global Coolant Distribution Units for AI Training and HPC Data Centers Consumption Value by Heat Transfer Architecture: 2021 Versus 2025 Versus 2032

1.3.2 Liquid-to-Liquid CDU

1.3.3 Liquid-to-Air CDU

1.3.4 Two-phase / Specialty-fluid CDU

1.3.5 Other

1.4 Market Analysis by Deployment Form Factor

1.4.1 Overview: Global Coolant Distribution Units for AI Training and HPC Data Centers Consumption Value by Deployment Form Factor: 2021 Versus 2025 Versus 2032

1.4.2 In-Rack CDU

1.4.3 In-Row CDU

1.4.4 Centralized / Plant-room CDU

1.4.5 Modular / Containerized CDU

1.5 Market Analysis by Cooling Capacity Class

1.5.1 Overview: Global Coolant Distribution Units for AI Training and HPC Data Centers Consumption Value by Cooling Capacity Class: 2021 Versus 2025 Versus 2032

1.5.2 ?100 kW

1.5.3 100?500 kW

1.5.4 500 kW?2 MW

1.5.5 >2 MW

1.6 Market Analysis by Served Cooling Endpoint

1.6.1 Overview: Global Coolant Distribution Units for AI Training and HPC Data Centers Consumption Value by Served Cooling Endpoint: 2021 Versus 2025 Versus 2032

1.6.2 Direct-to-Chip Cold Plate

1.6.3 Rear Door Heat Exchanger

1.6.4 Liquid-cooled Rack / Manifold

1.6.5 Immersion Interface

1.6.6 Other

1.7 Market Analysis by Application

1.7.1 Overview: Global Coolant Distribution Units for AI Training and HPC Data Centers Consumption Value by Application: 2021 Versus 2025 Versus 2032

1.7.2 AI Training Cluster / AI Factory

1.7.3 HPC / Supercomputing

1.7.4 Hyperscale Cloud / Colocation

1.7.5 Enterprise / Edge High-density IT

1.7.6 Other

1.8 Global Coolant Distribution Units for AI Training and HPC Data Centers Market Size & Forecast

1.8.1 Global Coolant Distribution Units for AI Training and HPC Data Centers Consumption Value (2021 & 2025 & 2032)

1.8.2 Global Coolant Distribution Units for AI Training and HPC Data Centers Sales Quantity (2021-2032)

1.8.3 Global Coolant Distribution Units for AI Training and HPC Data Centers Average Price (2021-2032)

2 MANUFACTURERS PROFILES

2.1 Vertiv Holdings Co

2.1.1 Vertiv Holdings Co Details

2.1.2 Vertiv Holdings Co Major Business

2.1.3 Vertiv Holdings Co Coolant Distribution Units for AI Training and HPC Data Centers Product and Services

2.1.4 Vertiv Holdings Co Coolant Distribution Units for AI Training and HPC Data Centers Sales Quantity, Average Price, Revenue, Gross Margin and Market Share (2021-2026)

2.1.5 Vertiv Holdings Co Recent Developments/Updates

2.2 Schneider Electric Motivair

2.2.1 Schneider Electric Motivair Details

2.2.2 Schneider Electric Motivair Major Business

2.2.3 Schneider Electric Motivair Coolant Distribution Units for AI Training and HPC Data Centers Product and Services

2.2.4 Schneider Electric Motivair Coolant Distribution Units for AI Training and HPC Data Centers Sales Quantity, Average Price, Revenue, Gross Margin and Market Share (2021-2026)

2.2.5 Schneider Electric Motivair Recent Developments/Updates

2.3 Eaton Boyd Thermal

2.3.1 Eaton Boyd Thermal Details

2.3.2 Eaton Boyd Thermal Major Business

2.3.3 Eaton Boyd Thermal Coolant Distribution Units for AI Training and HPC Data Centers Product and Services

2.3.4 Eaton Boyd Thermal Coolant Distribution Units for AI Training and HPC Data Centers Sales Quantity, Average Price, Revenue, Gross Margin and Market Share (2021-2026)

2.3.5 Eaton Boyd Thermal Recent Developments/Updates

2.4 CoolIT Systems

2.4.1 CoolIT Systems Details

2.4.2 CoolIT Systems Major Business

2.4.3 CoolIT Systems Coolant Distribution Units for AI Training and HPC Data Centers Product and Services

2.4.4 CoolIT Systems Coolant Distribution Units for AI Training and HPC Data Centers Sales Quantity, Average Price, Revenue, Gross Margin and Market Share (2021-2026)

2.4.5 CoolIT Systems Recent Developments/Updates

2.5 Delta Electronics

2.5.1 Delta Electronics Details

2.5.2 Delta Electronics Major Business

2.5.3 Delta Electronics Coolant Distribution Units for AI Training and HPC Data Centers Product and Services

2.5.4 Delta Electronics Coolant Distribution Units for AI Training and HPC Data Centers Sales Quantity, Average Price, Revenue, Gross Margin and Market Share (2021-2026)

2.5.5 Delta Electronics Recent Developments/Updates

2.6 nVent Electric

2.6.1 nVent Electric Details

2.6.2 nVent Electric Major Business

2.6.3 nVent Electric Coolant Distribution Units for AI Training and HPC Data Centers Product and Services

2.6.4 nVent Electric Coolant Distribution Units for AI Training and HPC Data Centers Sales Quantity, Average Price, Revenue, Gross Margin and Market Share (2021-2026)

2.6.5 nVent Electric Recent Developments/Updates

2.7 Envicool

2.7.1 Envicool Details

2.7.2 Envicool Major Business

2.7.3 Envicool Coolant Distribution Units for AI Training and HPC Data Centers Product and Services

2.7.4 Envicool Coolant Distribution Units for AI Training and HPC Data Centers Sales Quantity, Average Price, Revenue, Gross Margin and Market Share (2021-2026)

2.7.5 Envicool Recent Developments/Updates

2.8 Rittal

2.8.1 Rittal Details

2.8.2 Rittal Major Business

2.8.3 Rittal Coolant Distribution Units for AI Training and HPC Data Centers Product and Services

2.8.4 Rittal Coolant Distribution Units for AI Training and HPC Data Centers Sales Quantity, Average Price, Revenue, Gross Margin and Market Share (2021-2026)

2.8.5 Rittal Recent Developments/Updates

2.9 Johnson Controls Silent-Aire

2.9.1 Johnson Controls Silent-Aire Details

2.9.2 Johnson Controls Silent-Aire Major Business

2.9.3 Johnson Controls Silent-Aire Coolant Distribution Units for AI Training and HPC Data Centers Product and Services

2.9.4 Johnson Controls Silent-Aire Coolant Distribution Units for AI Training and HPC Data Centers Sales Quantity, Average Price, Revenue, Gross Margin and Market Share (2021-2026)

2.9.5 Johnson Controls Silent-Aire Recent Developments/Updates

2.10 LiquidStack

2.10.1 LiquidStack Details

2.10.2 LiquidStack Major Business

2.10.3 LiquidStack Coolant Distribution Units for AI Training and HPC Data Centers Product and Services

2.10.4 LiquidStack Coolant Distribution Units for AI Training and HPC Data Centers Sales Quantity, Average Price, Revenue, Gross Margin and Market Share (2021-2026)

2.10.5 LiquidStack Recent Developments/Updates

2.11 STULZ

2.11.1 STULZ Details

2.11.2 STULZ Major Business

2.11.3 STULZ Coolant Distribution Units for AI Training and HPC Data Centers Product and Services

2.11.4 STULZ Coolant Distribution Units for AI Training and HPC Data Centers Sales Quantity, Average Price, Revenue, Gross Margin and Market Share (2021-2026)

2.11.5 STULZ Recent Developments/Updates

2.12 LG Electronics

2.12.1 LG Electronics Details

2.12.2 LG Electronics Major Business

2.12.3 LG Electronics Coolant Distribution Units for AI Training and HPC Data Centers Product and Services

2.12.4 LG Electronics Coolant Distribution Units for AI Training and HPC Data Centers Sales Quantity, Average Price, Revenue, Gross Margin and Market Share (2021-2026)

2.12.5 LG Electronics Recent Developments/Updates

2.13 Airedale by Modine

2.13.1 Airedale by Modine Details

2.13.2 Airedale by Modine Major Business

2.13.3 Airedale by Modine Coolant Distribution Units for AI Training and HPC Data Centers Product and Services

2.13.4 Airedale by Modine Coolant Distribution Units for AI Training and HPC Data Centers Sales Quantity, Average Price, Revenue, Gross Margin and Market Share (2021-2026)

2.13.5 Airedale by Modine Recent Developments/Updates

2.14 Daikin

2.14.1 Daikin Details

2.14.2 Daikin Major Business

2.14.3 Daikin Coolant Distribution Units for AI Training and HPC Data Centers Product and Services

2.14.4 Daikin Coolant Distribution Units for AI Training and HPC Data Centers Sales Quantity, Average Price, Revenue, Gross Margin and Market Share (2021-2026)

2.14.5 Daikin Recent Developments/Updates

2.15 Asetek

2.15.1 Asetek Details

2.15.2 Asetek Major Business

2.15.3 Asetek Coolant Distribution Units for AI Training and HPC Data Centers Product and Services

2.15.4 Asetek Coolant Distribution Units for AI Training and HPC Data Centers Sales Quantity, Average Price, Revenue, Gross Margin and Market Share (2021-2026)

2.15.5 Asetek Recent Developments/Updates

2.16 Chilldyne

2.16.1 Chilldyne Details

2.16.2 Chilldyne Major Business

2.16.3 Chilldyne Coolant Distribution Units for AI Training and HPC Data Centers Product and Services

2.16.4 Chilldyne Coolant Distribution Units for AI Training and HPC Data Centers Sales Quantity, Average Price, Revenue, Gross Margin and Market Share (2021-2026)

2.16.5 Chilldyne Recent Developments/Updates

2.17 DCX Liquid Cooling Systems

2.17.1 DCX Liquid Cooling Systems Details

2.17.2 DCX Liquid Cooling Systems Major Business

2.17.3 DCX Liquid Cooling Systems Coolant Distribution Units for AI Training and HPC Data Centers Product and Services

2.17.4 DCX Liquid Cooling Systems Coolant Distribution Units for AI Training and HPC Data Centers Sales Quantity, Average Price, Revenue, Gross Margin and Market Share (2021-2026)

2.17.5 DCX Liquid Cooling Systems Recent Developments/Updates

3 COMPETITIVE ENVIRONMENT: COOLANT DISTRIBUTION UNITS FOR AI TRAINING AND HPC DATA CENTERS BY MANUFACTURER

3.1 Global Coolant Distribution Units for AI Training and HPC Data Centers Sales Quantity by Manufacturer (2021-2026)

3.2 Global Coolant Distribution Units for AI Training and HPC Data Centers Revenue by Manufacturer (2021-2026)

3.3 Global Coolant Distribution Units for AI Training and HPC Data Centers Average Price by Manufacturer (2021-2026)

3.4 Market Share Analysis (2025)

3.4.1 Producer Shipments of Coolant Distribution Units for AI Training and HPC Data Centers by Manufacturer Revenue (\$MM) and Market Share (%): 2025

3.4.2 Top 3 Coolant Distribution Units for AI Training and HPC Data Centers Manufacturer Market Share in 2025

3.4.3 Top 6 Coolant Distribution Units for AI Training and HPC Data Centers Manufacturer Market Share in 2025

3.5 Coolant Distribution Units for AI Training and HPC Data Centers Market: Overall Company Footprint Analysis

3.5.1 Coolant Distribution Units for AI Training and HPC Data Centers Market: Region Footprint

3.5.2 Coolant Distribution Units for AI Training and HPC Data Centers Market: Company Product Type Footprint

3.5.3 Coolant Distribution Units for AI Training and HPC Data Centers Market: Company Product Application Footprint

3.6 New Market Entrants and Barriers to Market Entry

3.7 Mergers, Acquisition, Agreements, and Collaborations

4 CONSUMPTION ANALYSIS BY REGION

4.1 Global Coolant Distribution Units for AI Training and HPC Data Centers Market Size by Region

4.1.1 Global Coolant Distribution Units for AI Training and HPC Data Centers Sales

Quantity by Region (2021-2032)

4.1.2 Global Coolant Distribution Units for AI Training and HPC Data Centers

Consumption Value by Region (2021-2032)

4.1.3 Global Coolant Distribution Units for AI Training and HPC Data Centers Average

Price by Region (2021-2032)

4.2 North America Coolant Distribution Units for AI Training and HPC Data Centers

Consumption Value (2021-2032)

4.3 Europe Coolant Distribution Units for AI Training and HPC Data Centers

Consumption Value (2021-2032)

4.4 Asia-Pacific Coolant Distribution Units for AI Training and HPC Data Centers

Consumption Value (2021-2032)

4.5 South America Coolant Distribution Units for AI Training and HPC Data Centers

Consumption Value (2021-2032)

4.6 Middle East & Africa Coolant Distribution Units for AI Training and HPC Data Centers Consumption Value (2021-2032)

5 MARKET SEGMENT BY HEAT TRANSFER ARCHITECTURE

5.1 Global Coolant Distribution Units for AI Training and HPC Data Centers Sales Quantity by Heat Transfer Architecture (2021-2032)

5.2 Global Coolant Distribution Units for AI Training and HPC Data Centers Consumption Value by Heat Transfer Architecture (2021-2032)

5.3 Global Coolant Distribution Units for AI Training and HPC Data Centers Average Price by Heat Transfer Architecture (2021-2032)

6 MARKET SEGMENT BY APPLICATION

6.1 Global Coolant Distribution Units for AI Training and HPC Data Centers Sales Quantity by Application (2021-2032)

6.2 Global Coolant Distribution Units for AI Training and HPC Data Centers Consumption Value by Application (2021-2032)

6.3 Global Coolant Distribution Units for AI Training and HPC Data Centers Average Price by Application (2021-2032)

7 NORTH AMERICA

7.1 North America Coolant Distribution Units for AI Training and HPC Data Centers Sales Quantity by Heat Transfer Architecture (2021-2032)

7.2 North America Coolant Distribution Units for AI Training and HPC Data Centers

Sales Quantity by Application (2021-2032)

7.3 North America Coolant Distribution Units for AI Training and HPC Data Centers

Market Size by Country

7.3.1 North America Coolant Distribution Units for AI Training and HPC Data Centers

Sales Quantity by Country (2021-2032)

7.3.2 North America Coolant Distribution Units for AI Training and HPC Data Centers

Consumption Value by Country (2021-2032)

7.3.3 United States Market Size and Forecast (2021-2032)

7.3.4 Canada Market Size and Forecast (2021-2032)

7.3.5 Mexico Market Size and Forecast (2021-2032)

8 EUROPE

8.1 Europe Coolant Distribution Units for AI Training and HPC Data Centers Sales
Quantity by Heat Transfer Architecture (2021-2032)

8.2 Europe Coolant Distribution Units for AI Training and HPC Data Centers Sales
Quantity by Application (2021-2032)

8.3 Europe Coolant Distribution Units for AI Training and HPC Data Centers Market
Size by Country

8.3.1 Europe Coolant Distribution Units for AI Training and HPC Data Centers Sales
Quantity by Country (2021-2032)

8.3.2 Europe Coolant Distribution Units for AI Training and HPC Data Centers
Consumption Value by Country (2021-2032)

8.3.3 Germany Market Size and Forecast (2021-2032)

8.3.4 France Market Size and Forecast (2021-2032)

8.3.5 United Kingdom Market Size and Forecast (2021-2032)

8.3.6 Russia Market Size and Forecast (2021-2032)

8.3.7 Italy Market Size and Forecast (2021-2032)

9 ASIA-PACIFIC

9.1 Asia-Pacific Coolant Distribution Units for AI Training and HPC Data Centers Sales
Quantity by Heat Transfer Architecture (2021-2032)

9.2 Asia-Pacific Coolant Distribution Units for AI Training and HPC Data Centers Sales
Quantity by Application (2021-2032)

9.3 Asia-Pacific Coolant Distribution Units for AI Training and HPC Data Centers Market
Size by Region

9.3.1 Asia-Pacific Coolant Distribution Units for AI Training and HPC Data Centers
Sales Quantity by Region (2021-2032)

9.3.2 Asia-Pacific Coolant Distribution Units for AI Training and HPC Data Centers
Consumption Value by Region (2021-2032)

9.3.3 China Market Size and Forecast (2021-2032)

9.3.4 Japan Market Size and Forecast (2021-2032)

9.3.5 South Korea Market Size and Forecast (2021-2032)

9.3.6 India Market Size and Forecast (2021-2032)

9.3.7 Southeast Asia Market Size and Forecast (2021-2032)

9.3.8 Australia Market Size and Forecast (2021-2032)

10 SOUTH AMERICA

10.1 South America Coolant Distribution Units for AI Training and HPC Data Centers
Sales Quantity by Heat Transfer Architecture (2021-2032)

10.2 South America Coolant Distribution Units for AI Training and HPC Data Centers
Sales Quantity by Application (2021-2032)

10.3 South America Coolant Distribution Units for AI Training and HPC Data Centers
Market Size by Country

10.3.1 South America Coolant Distribution Units for AI Training and HPC Data Centers
Sales Quantity by Country (2021-2032)

10.3.2 South America Coolant Distribution Units for AI Training and HPC Data Centers
Consumption Value by Country (2021-2032)

10.3.3 Brazil Market Size and Forecast (2021-2032)

10.3.4 Argentina Market Size and Forecast (2021-2032)

11 MIDDLE EAST & AFRICA

11.1 Middle East & Africa Coolant Distribution Units for AI Training and HPC Data
Centers Sales Quantity by Heat Transfer Architecture (2021-2032)

11.2 Middle East & Africa Coolant Distribution Units for AI Training and HPC Data
Centers Sales Quantity by Application (2021-2032)

11.3 Middle East & Africa Coolant Distribution Units for AI Training and HPC Data
Centers Market Size by Country

11.3.1 Middle East & Africa Coolant Distribution Units for AI Training and HPC Data
Centers Sales Quantity by Country (2021-2032)

11.3.2 Middle East & Africa Coolant Distribution Units for AI Training and HPC Data
Centers Consumption Value by Country (2021-2032)

11.3.3 Turkey Market Size and Forecast (2021-2032)

11.3.4 Egypt Market Size and Forecast (2021-2032)

11.3.5 Saudi Arabia Market Size and Forecast (2021-2032)

11.3.6 South Africa Market Size and Forecast (2021-2032)

12 MARKET DYNAMICS

12.1 Coolant Distribution Units for AI Training and HPC Data Centers Market Drivers

12.2 Coolant Distribution Units for AI Training and HPC Data Centers Market Restraints

12.3 Coolant Distribution Units for AI Training and HPC Data Centers Trends Analysis

12.4 Porters Five Forces Analysis

12.4.1 Threat of New Entrants

12.4.2 Bargaining Power of Suppliers

12.4.3 Bargaining Power of Buyers

12.4.4 Threat of Substitutes

12.4.5 Competitive Rivalry

13 RAW MATERIAL AND INDUSTRY CHAIN

13.1 Raw Material of Coolant Distribution Units for AI Training and HPC Data Centers and Key Manufacturers

13.2 Manufacturing Costs Percentage of Coolant Distribution Units for AI Training and HPC Data Centers

13.3 Coolant Distribution Units for AI Training and HPC Data Centers Production Process

13.4 Industry Value Chain Analysis

14 SHIPMENTS BY DISTRIBUTION CHANNEL

14.1 Sales Channel

14.1.1 Direct to End-User

14.1.2 Distributors

14.2 Coolant Distribution Units for AI Training and HPC Data Centers Typical Distributors

14.3 Coolant Distribution Units for AI Training and HPC Data Centers Typical Customers

15 RESEARCH FINDINGS AND CONCLUSION

16 APPENDIX

16.1 Methodology

16.2 Research Process and Data Source

16.3 Disclaimer

List Of Tables

LIST OF TABLES

- Table 1. Global Coolant Distribution Units for AI Training and HPC Data Centers Consumption Value by Heat Transfer Architecture, (USD Million), 2021 & 2025 & 2032
- Table 2. Global Coolant Distribution Units for AI Training and HPC Data Centers Consumption Value by Deployment Form Factor, (USD Million), 2021 & 2025 & 2032
- Table 3. Global Coolant Distribution Units for AI Training and HPC Data Centers Consumption Value by Cooling Capacity Class, (USD Million), 2021 & 2025 & 2032
- Table 4. Global Coolant Distribution Units for AI Training and HPC Data Centers Consumption Value by Served Cooling Endpoint, (USD Million), 2021 & 2025 & 2032
- Table 5. Global Coolant Distribution Units for AI Training and HPC Data Centers Consumption Value by Application, (USD Million), 2021 & 2025 & 2032
- Table 6. Vertiv Holdings Co Basic Information, Manufacturing Base and Competitors
- Table 7. Vertiv Holdings Co Major Business
- Table 8. Vertiv Holdings Co Coolant Distribution Units for AI Training and HPC Data Centers Product and Services
- Table 9. Vertiv Holdings Co Coolant Distribution Units for AI Training and HPC Data Centers Sales Quantity (Units), Average Price (US\$/Unit), Revenue (USD Million), Gross Margin and Market Share (2021-2026)
- Table 10. Vertiv Holdings Co Recent Developments/Updates
- Table 11. Schneider Electric Motivair Basic Information, Manufacturing Base and Competitors
- Table 12. Schneider Electric Motivair Major Business
- Table 13. Schneider Electric Motivair Coolant Distribution Units for AI Training and HPC Data Centers Product and Services
- Table 14. Schneider Electric Motivair Coolant Distribution Units for AI Training and HPC Data Centers Sales Quantity (Units), Average Price (US\$/Unit), Revenue (USD Million), Gross Margin and Market Share (2021-2026)
- Table 15. Schneider Electric Motivair Recent Developments/Updates
- Table 16. Eaton Boyd Thermal Basic Information, Manufacturing Base and Competitors
- Table 17. Eaton Boyd Thermal Major Business
- Table 18. Eaton Boyd Thermal Coolant Distribution Units for AI Training and HPC Data Centers Product and Services
- Table 19. Eaton Boyd Thermal Coolant Distribution Units for AI Training and HPC Data Centers Sales Quantity (Units), Average Price (US\$/Unit), Revenue (USD Million), Gross Margin and Market Share (2021-2026)
- Table 20. Eaton Boyd Thermal Recent Developments/Updates

Table 21. CoolIT Systems Basic Information, Manufacturing Base and Competitors

Table 22. CoolIT Systems Major Business

Table 23. CoolIT Systems Coolant Distribution Units for AI Training and HPC Data Centers Product and Services

Table 24. CoolIT Systems Coolant Distribution Units for AI Training and HPC Data Centers Sales Quantity (Units), Average Price (US\$/Unit), Revenue (USD Million), Gross Margin and Market Share (2021-2026)

Table 25. CoolIT Systems Recent Developments/Updates

Table 26. Delta Electronics Basic Information, Manufacturing Base and Competitors

Table 27. Delta Electronics Major Business

Table 28. Delta Electronics Coolant Distribution Units for AI Training and HPC Data Centers Product and Services

Table 29. Delta Electronics Coolant Distribution Units for AI Training and HPC Data Centers Sales Quantity (Units), Average Price (US\$/Unit), Revenue (USD Million), Gross Margin and Market Share (2021-2026)

Table 30. Delta Electronics Recent Developments/Updates

Table 31. nVent Electric Basic Information, Manufacturing Base and Competitors

Table 32. nVent Electric Major Business

Table 33. nVent Electric Coolant Distribution Units for AI Training and HPC Data Centers Product and Services

Table 34. nVent Electric Coolant Distribution Units for AI Training and HPC Data Centers Sales Quantity (Units), Average Price (US\$/Unit), Revenue (USD Million), Gross Margin and Market Share (2021-2026)

Table 35. nVent Electric Recent Developments/Updates

Table 36. Envicool Basic Information, Manufacturing Base and Competitors

Table 37. Envicool Major Business

Table 38. Envicool Coolant Distribution Units for AI Training and HPC Data Centers Product and Services

Table 39. Envicool Coolant Distribution Units for AI Training and HPC Data Centers Sales Quantity (Units), Average Price (US\$/Unit), Revenue (USD Million), Gross Margin and Market Share (2021-2026)

Table 40. Envicool Recent Developments/Updates

Table 41. Rittal Basic Information, Manufacturing Base and Competitors

Table 42. Rittal Major Business

Table 43. Rittal Coolant Distribution Units for AI Training and HPC Data Centers Product and Services

Table 44. Rittal Coolant Distribution Units for AI Training and HPC Data Centers Sales Quantity (Units), Average Price (US\$/Unit), Revenue (USD Million), Gross Margin and Market Share (2021-2026)

Table 45. Rittal Recent Developments/Updates

Table 46. Johnson Controls Silent-Aire Basic Information, Manufacturing Base and Competitors

Table 47. Johnson Controls Silent-Aire Major Business

Table 48. Johnson Controls Silent-Aire Coolant Distribution Units for AI Training and HPC Data Centers Product and Services

Table 49. Johnson Controls Silent-Aire Coolant Distribution Units for AI Training and HPC Data Centers Sales Quantity (Units), Average Price (US\$/Unit), Revenue (USD Million), Gross Margin and Market Share (2021-2026)

Table 50. Johnson Controls Silent-Aire Recent Developments/Updates

Table 51. LiquidStack Basic Information, Manufacturing Base and Competitors

Table 52. LiquidStack Major Business

Table 53. LiquidStack Coolant Distribution Units for AI Training and HPC Data Centers Product and Services

Table 54. LiquidStack Coolant Distribution Units for AI Training and HPC Data Centers Sales Quantity (Units), Average Price (US\$/Unit), Revenue (USD Million), Gross Margin and Market Share (2021-2026)

Table 55. LiquidStack Recent Developments/Updates

Table 56. STULZ Basic Information, Manufacturing Base and Competitors

Table 57. STULZ Major Business

Table 58. STULZ Coolant Distribution Units for AI Training and HPC Data Centers Product and Services

Table 59. STULZ Coolant Distribution Units for AI Training and HPC Data Centers Sales Quantity (Units), Average Price (US\$/Unit), Revenue (USD Million), Gross Margin and Market Share (2021-2026)

Table 60. STULZ Recent Developments/Updates

Table 61. LG Electronics Basic Information, Manufacturing Base and Competitors

Table 62. LG Electronics Major Business

Table 63. LG Electronics Coolant Distribution Units for AI Training and HPC Data Centers Product and Services

Table 64. LG Electronics Coolant Distribution Units for AI Training and HPC Data Centers Sales Quantity (Units), Average Price (US\$/Unit), Revenue (USD Million), Gross Margin and Market Share (2021-2026)

Table 65. LG Electronics Recent Developments/Updates

Table 66. Airedale by Modine Basic Information, Manufacturing Base and Competitors

Table 67. Airedale by Modine Major Business

Table 68. Airedale by Modine Coolant Distribution Units for AI Training and HPC Data Centers Product and Services

Table 69. Airedale by Modine Coolant Distribution Units for AI Training and HPC Data

Centers Sales Quantity (Units), Average Price (US\$/Unit), Revenue (USD Million),
Gross Margin and Market Share (2021-2026)

Table 70. Airedale by Modine Recent Developments/Updates

Table 71. Daikin Basic Information, Manufacturing Base and Competitors

Table 72. Daikin Major Business

Table 73. Daikin Coolant Distribution Units for AI Training and HPC Data Centers
Product and Services

Table 74. Daikin Coolant Distribution Units for AI Training and HPC Data Centers Sales
Quantity (Units), Average Price (US\$/Unit), Revenue (USD Million), Gross Margin and
Market Share (2021-2026)

Table 75. Daikin Recent Developments/Updates

Table 76. Asetek Basic Information, Manufacturing Base and Competitors

Table 77. Asetek Major Business

Table 78. Asetek Coolant Distribution Units for AI Training and HPC Data Centers
Product and Services

Table 79. Asetek Coolant Distribution Units for AI Training and HPC Data Centers Sales
Quantity (Units), Average Price (US\$/Unit), Revenue (USD Million), Gross Margin and
Market Share (2021-2026)

Table 80. Asetek Recent Developments/Updates

Table 81. Childdyne Basic Information, Manufacturing Base and Competitors

Table 82. Childdyne Major Business

Table 83. Childdyne Coolant Distribution Units for AI Training and HPC Data Centers
Product and Services

Table 84. Childdyne Coolant Distribution Units for AI Training and HPC Data Centers
Sales Quantity (Units), Average Price (US\$/Unit), Revenue (USD Million), Gross Margin
and Market Share (2021-2026)

Table 85. Childdyne Recent Developments/Updates

Table 86. DCX Liquid Cooling Systems Basic Information, Manufacturing Base and
Competitors

Table 87. DCX Liquid Cooling Systems Major Business

Table 88. DCX Liquid Cooling Systems Coolant Distribution Units for AI Training and
HPC Data Centers Product and Services

Table 89. DCX Liquid Cooling Systems Coolant Distribution Units for AI Training and
HPC Data Centers Sales Quantity (Units), Average Price (US\$/Unit), Revenue (USD
Million), Gross Margin and Market Share (2021-2026)

Table 90. DCX Liquid Cooling Systems Recent Developments/Updates

Table 91. Global Coolant Distribution Units for AI Training and HPC Data Centers Sales
Quantity by Manufacturer (2021-2026) & (Units)

Table 92. Global Coolant Distribution Units for AI Training and HPC Data Centers

Revenue by Manufacturer (2021-2026) & (USD Million)

Table 93. Global Coolant Distribution Units for AI Training and HPC Data Centers

Average Price by Manufacturer (2021-2026) & (US\$/Unit)

Table 94. Market Position of Manufacturers in Coolant Distribution Units for AI Training and HPC Data Centers, (Tier 1, Tier 2, and Tier 3), Based on Revenue in 2025

Table 95. Head Office and Coolant Distribution Units for AI Training and HPC Data Centers Production Site of Key Manufacturer

Table 96. Coolant Distribution Units for AI Training and HPC Data Centers Market: Company Product Type Footprint

Table 97. Coolant Distribution Units for AI Training and HPC Data Centers Market: Company Product Application Footprint

Table 98. Coolant Distribution Units for AI Training and HPC Data Centers New Market Entrants and Barriers to Market Entry

Table 99. Coolant Distribution Units for AI Training and HPC Data Centers Mergers, Acquisition, Agreements, and Collaborations

Table 100. Global Coolant Distribution Units for AI Training and HPC Data Centers Consumption Value by Region (2021-2025-2032) & (USD Million) & CAGR

Table 101. Global Coolant Distribution Units for AI Training and HPC Data Centers Sales Quantity by Region (2021-2026) & (Units)

Table 102. Global Coolant Distribution Units for AI Training and HPC Data Centers Sales Quantity by Region (2027-2032) & (Units)

Table 103. Global Coolant Distribution Units for AI Training and HPC Data Centers Consumption Value by Region (2021-2026) & (USD Million)

Table 104. Global Coolant Distribution Units for AI Training and HPC Data Centers Consumption Value by Region (2027-2032) & (USD Million)

Table 105. Global Coolant Distribution Units for AI Training and HPC Data Centers Average Price by Region (2021-2026) & (US\$/Unit)

Table 106. Global Coolant Distribution Units for AI Training and HPC Data Centers Average Price by Region (2027-2032) & (US\$/Unit)

Table 107. Global Coolant Distribution Units for AI Training and HPC Data Centers Sales Quantity by Heat Transfer Architecture (2021-2026) & (Units)

Table 108. Global Coolant Distribution Units for AI Training and HPC Data Centers Sales Quantity by Heat Transfer Architecture (2027-2032) & (Units)

Table 109. Global Coolant Distribution Units for AI Training and HPC Data Centers Consumption Value by Heat Transfer Architecture (2021-2026) & (USD Million)

Table 110. Global Coolant Distribution Units for AI Training and HPC Data Centers Consumption Value by Heat Transfer Architecture (2027-2032) & (USD Million)

Table 111. Global Coolant Distribution Units for AI Training and HPC Data Centers Average Price by Heat Transfer Architecture (2021-2026) & (US\$/Unit)

Table 112. Global Coolant Distribution Units for AI Training and HPC Data Centers Average Price by Heat Transfer Architecture (2027-2032) & (US\$/Unit)

Table 113. Global Coolant Distribution Units for AI Training and HPC Data Centers Sales Quantity by Application (2021-2026) & (Units)

Table 114. Global Coolant Distribution Units for AI Training and HPC Data Centers Sales Quantity by Application (2027-2032) & (Units)

Table 115. Global Coolant Distribution Units for AI Training and HPC Data Centers Consumption Value by Application (2021-2026) & (USD Million)

Table 116. Global Coolant Distribution Units for AI Training and HPC Data Centers Consumption Value by Application (2027-2032) & (USD Million)

Table 117. Global Coolant Distribution Units for AI Training and HPC Data Centers Average Price by Application (2021-2026) & (US\$/Unit)

Table 118. Global Coolant Distribution Units for AI Training and HPC Data Centers Average Price by Application (2027-2032) & (US\$/Unit)

Table 119. North America Coolant Distribution Units for AI Training and HPC Data Centers Sales Quantity by Heat Transfer Architecture (2021-2026) & (Units)

Table 120. North America Coolant Distribution Units for AI Training and HPC Data Centers Sales Quantity by Heat Transfer Architecture (2027-2032) & (Units)

Table 121. North America Coolant Distribution Units for AI Training and HPC Data Centers Sales Quantity by Application (2021-2026) & (Units)

Table 122. North America Coolant Distribution Units for AI Training and HPC Data Centers Sales Quantity by Application (2027-2032) & (Units)

Table 123. North America Coolant Distribution Units for AI Training and HPC Data Centers Sales Quantity by Country (2021-2026) & (Units)

Table 124. North America Coolant Distribution Units for AI Training and HPC Data Centers Sales Quantity by Country (2027-2032) & (Units)

Table 125. North America Coolant Distribution Units for AI Training and HPC Data Centers Consumption Value by Country (2021-2026) & (USD Million)

Table 126. North America Coolant Distribution Units for AI Training and HPC Data Centers Consumption Value by Country (2027-2032) & (USD Million)

Table 127. Europe Coolant Distribution Units for AI Training and HPC Data Centers Sales Quantity by Heat Transfer Architecture (2021-2026) & (Units)

Table 128. Europe Coolant Distribution Units for AI Training and HPC Data Centers Sales Quantity by Heat Transfer Architecture (2027-2032) & (Units)

Table 129. Europe Coolant Distribution Units for AI Training and HPC Data Centers Sales Quantity by Application (2021-2026) & (Units)

Table 130. Europe Coolant Distribution Units for AI Training and HPC Data Centers Sales Quantity by Application (2027-2032) & (Units)

Table 131. Europe Coolant Distribution Units for AI Training and HPC Data Centers

Sales Quantity by Country (2021-2026) & (Units)

Table 132. Europe Coolant Distribution Units for AI Training and HPC Data Centers

Sales Quantity by Country (2027-2032) & (Units)

Table 133. Europe Coolant Distribution Units for AI Training and HPC Data Centers

Consumption Value by Country (2021-2026) & (USD Million)

Table 134. Europe Coolant Distribution Units for AI Training and HPC Data Centers

Consumption Value by Country (2027-2032) & (USD Million)

Table 135. Asia-Pacific Coolant Distribution Units for AI Training and HPC Data Centers

Sales Quantity by Heat Transfer Architecture (2021-2026) & (Units)

Table 136. Asia-Pacific Coolant Distribution Units for AI Training and HPC Data Centers

Sales Quantity by Heat Transfer Architecture (2027-2032) & (Units)

Table 137. Asia-Pacific Coolant Distribution Units for AI Training and HPC Data Centers

Sales Quantity by Application (2021-2026) & (Units)

Table 138. Asia-Pacific Coolant Distribution Units for AI Training and HPC Data Centers

Sales Quantity by Application (2027-2032) & (Units)

Table 139. Asia-Pacific Coolant Distribution Units for AI Training and HPC Data Centers

Sales Quantity by Region (2021-2026) & (Units)

Table 140. Asia-Pacific Coolant Distribution Units for AI Training and HPC Data Centers

Sales Quantity by Region (2027-2032) & (Units)

Table 141. Asia-Pacific Coolant Distribution Units for AI Training and HPC Data Centers

Consumption Value by Region (2021-2026) & (USD Million)

Table 142. Asia-Pacific Coolant Distribution Units for AI Training and HPC Data Centers

Consumption Value by Region (2027-2032) & (USD Million)

Table 143. South America Coolant Distribution Units for AI Training and HPC Data Centers Sales Quantity by Heat Transfer Architecture (2021-2026) & (Units)

Table 144. South America Coolant Distribution Units for AI Training and HPC Data Centers Sales Quantity by Heat Transfer Architecture (2027-2032) & (Units)

Table 145. South America Coolant Distribution Units for AI Training and HPC Data Centers Sales Quantity by Application (2021-2026) & (Units)

Table 146. South America Coolant Distribution Units for AI Training and HPC Data Centers Sales Quantity by Application (2027-2032) & (Units)

Table 147. South America Coolant Distribution Units for AI Training and HPC Data Centers Sales Quantity by Country (2021-2026) & (Units)

Table 148. South America Coolant Distribution Units for AI Training and HPC Data Centers Sales Quantity by Country (2027-2032) & (Units)

Table 149. South America Coolant Distribution Units for AI Training and HPC Data Centers Consumption Value by Country (2021-2026) & (USD Million)

Table 150. South America Coolant Distribution Units for AI Training and HPC Data Centers Consumption Value by Country (2027-2032) & (USD Million)

Table 151. Middle East & Africa Coolant Distribution Units for AI Training and HPC Data Centers Sales Quantity by Heat Transfer Architecture (2021-2026) & (Units)

Table 152. Middle East & Africa Coolant Distribution Units for AI Training and HPC Data Centers Sales Quantity by Heat Transfer Architecture (2027-2032) & (Units)

Table 153. Middle East & Africa Coolant Distribution Units for AI Training and HPC Data Centers Sales Quantity by Application (2021-2026) & (Units)

Table 154. Middle East & Africa Coolant Distribution Units for AI Training and HPC Data Centers Sales Quantity by Application (2027-2032) & (Units)

Table 155. Middle East & Africa Coolant Distribution Units for AI Training and HPC Data Centers Sales Quantity by Country (2021-2026) & (Units)

Table 156. Middle East & Africa Coolant Distribution Units for AI Training and HPC Data Centers Sales Quantity by Country (2027-2032) & (Units)

Table 157. Middle East & Africa Coolant Distribution Units for AI Training and HPC Data Centers Consumption Value by Country (2021-2026) & (USD Million)

Table 158. Middle East & Africa Coolant Distribution Units for AI Training and HPC Data Centers Consumption Value by Country (2027-2032) & (USD Million)

Table 159. Coolant Distribution Units for AI Training and HPC Data Centers Raw Material

Table 160. Key Manufacturers of Coolant Distribution Units for AI Training and HPC Data Centers Raw Materials

Table 161. Coolant Distribution Units for AI Training and HPC Data Centers Typical Distributors

Table 162. Coolant Distribution Units for AI Training and HPC Data Centers Typical Customers

List Of Figures

LIST OF FIGURES

- Figure 1. Coolant Distribution Units for AI Training and HPC Data Centers Picture
- Figure 2. Global Coolant Distribution Units for AI Training and HPC Data Centers Revenue by Heat Transfer Architecture, (USD Million), 2021 & 2025 & 2032
- Figure 3. Global Coolant Distribution Units for AI Training and HPC Data Centers Revenue Market Share by Heat Transfer Architecture in 2025
- Figure 4. Liquid-to-Liquid CDU Examples
- Figure 5. Liquid-to-Air CDU Examples
- Figure 6. Two-phase / Specialty-fluid CDU Examples
- Figure 7. Other Examples
- Figure 8. Global Coolant Distribution Units for AI Training and HPC Data Centers Revenue by Deployment Form Factor, (USD Million), 2021 & 2025 & 2032
- Figure 9. Global Coolant Distribution Units for AI Training and HPC Data Centers Revenue Market Share by Deployment Form Factor in 2025
- Figure 10. In-Rack CDU Examples
- Figure 11. In-Row CDU Examples
- Figure 12. Centralized / Plant-room CDU Examples
- Figure 13. Modular / Containerized CDU Examples
- Figure 14. Global Coolant Distribution Units for AI Training and HPC Data Centers Revenue by Cooling Capacity Class, (USD Million), 2021 & 2025 & 2032
- Figure 15. Global Coolant Distribution Units for AI Training and HPC Data Centers Revenue Market Share by Cooling Capacity Class in 2025
- Figure 16. ?100 kW Examples
- Figure 17. 100?500 kW Examples
- Figure 18. 500 kW?2 MW Examples
- Figure 19. >2 MW Examples
- Figure 20. Global Coolant Distribution Units for AI Training and HPC Data Centers Revenue by Served Cooling Endpoint, (USD Million), 2021 & 2025 & 2032
- Figure 21. Global Coolant Distribution Units for AI Training and HPC Data Centers Revenue Market Share by Served Cooling Endpoint in 2025
- Figure 22. Direct-to-Chip Cold Plate Examples
- Figure 23. Rear Door Heat Exchanger Examples
- Figure 24. Liquid-cooled Rack / Manifold Examples
- Figure 25. Immersion Interface Examples
- Figure 26. Other Examples
- Figure 27. Global Coolant Distribution Units for AI Training and HPC Data Centers

Consumption Value by Application, (USD Million), 2021 & 2025 & 2032

Figure 28. Global Coolant Distribution Units for AI Training and HPC Data Centers

Revenue Market Share by Application in 2025

Figure 29. AI Training Cluster / AI Factory Examples

Figure 30. HPC / Supercomputing Examples

Figure 31. Hyperscale Cloud / Colocation Examples

Figure 32. Enterprise / Edge High-density IT Examples

Figure 33. Other Examples

Figure 34. Global Coolant Distribution Units for AI Training and HPC Data Centers

Consumption Value, (USD Million): 2021 & 2025 & 2032

Figure 35. Global Coolant Distribution Units for AI Training and HPC Data Centers

Consumption Value and Forecast (2021-2032) & (USD Million)

Figure 36. Global Coolant Distribution Units for AI Training and HPC Data Centers

Sales Quantity (2021-2032) & (Units)

Figure 37. Global Coolant Distribution Units for AI Training and HPC Data Centers Price
(2021-2032) & (US\$/Unit)

Figure 38. Global Coolant Distribution Units for AI Training and HPC Data Centers

Sales Quantity Market Share by Manufacturer in 2025

Figure 39. Global Coolant Distribution Units for AI Training and HPC Data Centers

Revenue Market Share by Manufacturer in 2025

Figure 40. Producer Shipments of Coolant Distribution Units for AI Training and HPC

Data Centers by Manufacturer Sales (\$MM) and Market Share (%): 2025

Figure 41. Top 3 Coolant Distribution Units for AI Training and HPC Data Centers

Manufacturer (Revenue) Market Share in 2025

Figure 42. Top 6 Coolant Distribution Units for AI Training and HPC Data Centers

Manufacturer (Revenue) Market Share in 2025

Figure 43. Global Coolant Distribution Units for AI Training and HPC Data Centers

Sales Quantity Market Share by Region (2021-2032)

Figure 44. Global Coolant Distribution Units for AI Training and HPC Data Centers

Consumption Value Market Share by Region (2021-2032)

Figure 45. North America Coolant Distribution Units for AI Training and HPC Data
Centers Consumption Value (2021-2032) & (USD Million)

Figure 46. Europe Coolant Distribution Units for AI Training and HPC Data Centers
Consumption Value (2021-2032) & (USD Million)

Figure 47. Asia-Pacific Coolant Distribution Units for AI Training and HPC Data Centers
Consumption Value (2021-2032) & (USD Million)

Figure 48. South America Coolant Distribution Units for AI Training and HPC Data
Centers Consumption Value (2021-2032) & (USD Million)

Figure 49. Middle East & Africa Coolant Distribution Units for AI Training and HPC Data

Centers Consumption Value (2021-2032) & (USD Million)

Figure 50. Global Coolant Distribution Units for AI Training and HPC Data Centers Sales Quantity Market Share by Heat Transfer Architecture (2021-2032)

Figure 51. Global Coolant Distribution Units for AI Training and HPC Data Centers Consumption Value Market Share by Heat Transfer Architecture (2021-2032)

Figure 52. Global Coolant Distribution Units for AI Training and HPC Data Centers Average Price by Heat Transfer Architecture (2021-2032) & (US\$/Unit)

Figure 53. Global Coolant Distribution Units for AI Training and HPC Data Centers Sales Quantity Market Share by Application (2021-2032)

Figure 54. Global Coolant Distribution Units for AI Training and HPC Data Centers Revenue Market Share by Application (2021-2032)

Figure 55. Global Coolant Distribution Units for AI Training and HPC Data Centers Average Price by Application (2021-2032) & (US\$/Unit)

Figure 56. North America Coolant Distribution Units for AI Training and HPC Data Centers Sales Quantity Market Share by Heat Transfer Architecture (2021-2032)

Figure 57. North America Coolant Distribution Units for AI Training and HPC Data Centers Sales Quantity Market Share by Application (2021-2032)

Figure 58. North America Coolant Distribution Units for AI Training and HPC Data Centers Sales Quantity Market Share by Country (2021-2032)

Figure 59. North America Coolant Distribution Units for AI Training and HPC Data Centers Consumption Value Market Share by Country (2021-2032)

Figure 60. United States Coolant Distribution Units for AI Training and HPC Data Centers Consumption Value (2021-2032) & (USD Million)

Figure 61. Canada Coolant Distribution Units for AI Training and HPC Data Centers Consumption Value (2021-2032) & (USD Million)

Figure 62. Mexico Coolant Distribution Units for AI Training and HPC Data Centers Consumption Value (2021-2032) & (USD Million)

Figure 63. Europe Coolant Distribution Units for AI Training and HPC Data Centers Sales Quantity Market Share by Heat Transfer Architecture (2021-2032)

Figure 64. Europe Coolant Distribution Units for AI Training and HPC Data Centers Sales Quantity Market Share by Application (2021-2032)

Figure 65. Europe Coolant Distribution Units for AI Training and HPC Data Centers Sales Quantity Market Share by Country (2021-2032)

Figure 66. Europe Coolant Distribution Units for AI Training and HPC Data Centers Consumption Value Market Share by Country (2021-2032)

Figure 67. Germany Coolant Distribution Units for AI Training and HPC Data Centers Consumption Value (2021-2032) & (USD Million)

Figure 68. France Coolant Distribution Units for AI Training and HPC Data Centers Consumption Value (2021-2032) & (USD Million)

Figure 69. United Kingdom Coolant Distribution Units for AI Training and HPC Data Centers Consumption Value (2021-2032) & (USD Million)

Figure 70. Russia Coolant Distribution Units for AI Training and HPC Data Centers Consumption Value (2021-2032) & (USD Million)

Figure 71. Italy Coolant Distribution Units for AI Training and HPC Data Centers Consumption Value (2021-2032) & (USD Million)

Figure 72. Asia-Pacific Coolant Distribution Units for AI Training and HPC Data Centers Sales Quantity Market Share by Heat Transfer Architecture (2021-2032)

Figure 73. Asia-Pacific Coolant Distribution Units for AI Training and HPC Data Centers Sales Quantity Market Share by Application (2021-2032)

Figure 74. Asia-Pacific Coolant Distribution Units for AI Training and HPC Data Centers Sales Quantity Market Share by Region (2021-2032)

Figure 75. Asia-Pacific Coolant Distribution Units for AI Training and HPC Data Centers Consumption Value Market Share by Region (2021-2032)

Figure 76. China Coolant Distribution Units for AI Training and HPC Data Centers Consumption Value (2021-2032) & (USD Million)

Figure 77. Japan Coolant Distribution Units for AI Training and HPC Data Centers Consumption Value (2021-2032) & (USD Million)

Figure 78. South Korea Coolant Distribution Units for AI Training and HPC Data Centers Consumption Value (2021-2032) & (USD Million)

Figure 79. India Coolant Distribution Units for AI Training and HPC Data Centers Consumption Value (2021-2032) & (USD Million)

Figure 80. Southeast Asia Coolant Distribution Units for AI Training and HPC Data Centers Consumption Value (2021-2032) & (USD Million)

Figure 81. Australia Coolant Distribution Units for AI Training and HPC Data Centers Consumption Value (2021-2032) & (USD Million)

Figure 82. South America Coolant Distribution Units for AI Training and HPC Data Centers Sales Quantity Market Share by Heat Transfer Architecture (2021-2032)

Figure 83. South America Coolant Distribution Units for AI Training and HPC Data Centers Sales Quantity Market Share by Application (2021-2032)

Figure 84. South America Coolant Distribution Units for AI Training and HPC Data Centers Sales Quantity Market Share by Country (2021-2032)

Figure 85. South America Coolant Distribution Units for AI Training and HPC Data Centers Consumption Value Market Share by Country (2021-2032)

Figure 86. Brazil Coolant Distribution Units for AI Training and HPC Data Centers Consumption Value (2021-2032) & (USD Million)

Figure 87. Argentina Coolant Distribution Units for AI Training and HPC Data Centers Consumption Value (2021-2032) & (USD Million)

Figure 88. Middle East & Africa Coolant Distribution Units for AI Training and HPC Data

Centers Sales Quantity Market Share by Heat Transfer Architecture (2021-2032)

Figure 89. Middle East & Africa Coolant Distribution Units for AI Training and HPC Data

Centers Sales Quantity Market Share by Application (2021-2032)

Figure 90. Middle East & Africa Coolant Distribution Units for AI Training and HPC Data

Centers Sales Quantity Market Share by Country (2021-2032)

Figure 91. Middle East & Africa Coolant Distribution Units for AI Training and HPC Data

Centers Consumption Value Market Share by Country (2021-2032)

Figure 92. Turkey Coolant Distribution Units for AI Training and HPC Data Centers

Consumption Value (2021-2032) & (USD Million)

Figure 93. Egypt Coolant Distribution Units for AI Training and HPC Data Centers

Consumption Value (2021-2032) & (USD Million)

Figure 94. Saudi Arabia Coolant Distribution Units for AI Training and HPC Data

Centers Consumption Value (2021-2032) & (USD Million)

Figure 95. South Africa Coolant Distribution Units for AI Training and HPC Data Centers

Consumption Value (2021-2032) & (USD Million)

Figure 96. Coolant Distribution Units for AI Training and HPC Data Centers Market Drivers

Figure 97. Coolant Distribution Units for AI Training and HPC Data Centers Market Restraints

Figure 98. Coolant Distribution Units for AI Training and HPC Data Centers Market Trends

Figure 99. Porters Five Forces Analysis

Figure 100. Manufacturing Cost Structure Analysis of Coolant Distribution Units for AI Training and HPC Data Centers in 2025

Figure 101. Manufacturing Process Analysis of Coolant Distribution Units for AI Training and HPC Data Centers

Figure 102. Coolant Distribution Units for AI Training and HPC Data Centers Industrial Chain

Figure 103. Sales Channel: Direct to End-User vs Distributors

Figure 104. Direct Channel Pros & Cons

Figure 105. Indirect Channel Pros & Cons

Figure 106. Methodology

Figure 107. Research Process and Data Source

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