

Global Coolant Distribution Units for AI Training and HPC Data Centers Supply, Demand and Key Producers, 2026-2032

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Abstracts

The global Coolant Distribution Units for AI Training and HPC Data Centers market size is expected to reach \$ 5560 million by 2032, rising at a market growth of 24.8% CAGR during the forecast period (2026-2032).

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 studies the global Coolant Distribution Units for AI Training and HPC Data Centers production, demand, key manufacturers, and key regions.

This report is a detailed and comprehensive analysis of the world market for Coolant Distribution Units for AI Training and HPC Data Centers and provides market size (US\$ million) and Year-over-Year (YoY) Growth, considering 2025 as the base year. This report explores demand trends and competition, as well as details the characteristics of Coolant Distribution Units for AI Training and HPC Data Centers that contribute to its increasing demand across many markets.

Highlights and key features of the study

Global Coolant Distribution Units for AI Training and HPC Data Centers total production and demand, 2021-2032, (Units)

Global Coolant Distribution Units for AI Training and HPC Data Centers total production value, 2021-2032, (USD Million)

Global Coolant Distribution Units for AI Training and HPC Data Centers production by region & country, production, value, CAGR, 2021-2032, (USD Million) & (Units), (based on production site)

Global Coolant Distribution Units for AI Training and HPC Data Centers consumption by region & country, CAGR, 2021-2032 & (Units)

U.S. VS China: Coolant Distribution Units for AI Training and HPC Data Centers domestic production, consumption, key domestic manufacturers and share

Global Coolant Distribution Units for AI Training and HPC Data Centers production by manufacturer, production, price, value and market share 2021-2026, (USD Million) & (Units)

Global Coolant Distribution Units for AI Training and HPC Data Centers production by Heat Transfer Architecture, production, value, CAGR, 2021-2032, (USD Million) & (Units)

Global Coolant Distribution Units for AI Training and HPC Data Centers production by Application, production, value, CAGR, 2021-2032, (USD Million) & (Units)

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, production, value, 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.

Stakeholders would have ease in decision-making through various strategy matrices used in analyzing the World Coolant Distribution Units for AI Training and HPC Data Centers market

Detailed Segmentation:

Each section contains quantitative market data including market by value (US\$ Millions), volume (production, consumption) & (Units) and average price (US\$/Unit) by

manufacturer, by Heat Transfer Architecture, and by Application. Data is given for the years 2021-2032 by year with 2025 as the base year, 2026 as the estimate year, and 2027-2032 as the forecast year.

Global Coolant Distribution Units for AI Training and HPC Data Centers Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Global Coolant Distribution Units for AI Training and HPC Data Centers Market, Segmentation by Heat Transfer Architecture:

Liquid-to-Liquid CDU

Liquid-to-Air CDU

Two-phase / Specialty-fluid CDU

Other

Global Coolant Distribution Units for AI Training and HPC Data Centers Market, Segmentation by Deployment Form Factor:

In-Rack CDU

In-Row CDU

Centralized / Plant-room CDU

Modular / Containerized CDU

Global Coolant Distribution Units for AI Training and HPC Data Centers Market,
Segmentation by Cooling Capacity Class:

?100 kW

100?500 kW

500 kW?2 MW

>2 MW

Global Coolant Distribution Units for AI Training and HPC Data Centers Market,
Segmentation by Served Cooling Endpoint:

Direct-to-Chip Cold Plate

Rear Door Heat Exchanger

Liquid-cooled Rack / Manifold

Immersion Interface

Other

Global Coolant Distribution Units for AI Training and HPC Data Centers Market,
Segmentation by Application:

AI Training Cluster / AI Factory

HPC / Supercomputing

Hyperscale Cloud / Colocation

Enterprise / Edge High-density IT

Other

Companies Profiled:

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

Chilldyne

DCX Liquid Cooling Systems

Key Questions Answered:

1. How big is the global Coolant Distribution Units for AI Training and HPC Data Centers market?
2. What is the demand of the global Coolant Distribution Units for AI Training and HPC Data Centers market?
3. What is the year over year growth of the global Coolant Distribution Units for AI Training and HPC Data Centers market?
4. What is the production and production value of the global Coolant Distribution Units for AI Training and HPC Data Centers market?
5. Who are the key producers in the global Coolant Distribution Units for AI Training and HPC Data Centers market?
6. What are the growth factors driving the market demand?

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