

# Global Coolant Distribution Units (CDU) Supply, Demand and Key Producers, 2026-2032

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## Abstracts

The global Coolant Distribution Units (CDU) market size is expected to reach \$ 4456 million by 2032, rising at a market growth of 18.1% CAGR during the forecast period (2026-2032).

Coolant Distribution Unit (CDU) is an essential component in liquid cooling systems that distribute coolant or water evenly throughout the system. The CDU regulates and controls the flow of coolant, maintaining the desired temperature and flow rate. It works in conjunction with pumps, radiators, heat exchangers, and control units to ensure the cooling system runs smoothly and efficiently. The CDU also helps keep the system clean by removing impurities from the coolant, preventing clogging and damage to other components in the system. Overall, the CDU plays a critical role in maintaining the proper functioning of liquid cooling systems.

Upstream: The main components of a CDU include pumps, reservoirs, power supplies, control boards, and heat exchangers. Additionally, filters, flow meters, pressure transducers, and other devices are used in managing the operation of the CDU in conjunction with the Server Rack. Downstream: CDUs are primarily used in data centers.

In 2025, global sales of CDU reached approximately 88 K units, with an average global market price of around US\$ 15 K/unit. Production capacity varies significantly among manufacturers, with gross profit margins ranging from approximately 30% to 50%.

The market for Coolant Distribution Units (CDU) is closely tied to the rapid shift from air-based to liquid-based cooling in data centers and other high-density compute environments. As workloads such as AI training, large-scale analytics and high-

performance computing push rack power well beyond what traditional air systems can efficiently manage, operators are turning to direct-to-chip cooling, rear-door heat exchangers and immersion solutions, all of which typically require a CDU as the hydraulic and control hub. Hyperscale and colocation data centers are currently the most active adopters, using CDUs to enable higher rack densities, stabilize operating temperatures and free up whitespace, while enterprise and edge facilities are beginning to deploy smaller CDUs in pilot clusters and gradually extend them to critical workloads.

Key demand drivers for CDUs include the need to improve energy efficiency, reduce total cost of ownership and meet increasingly strict sustainability and regulatory expectations. By separating the facility water loop from the IT cooling loop, CDUs allow operators to run higher supply temperatures, enhance heat-recovery potential and in many cases reduce dependence on water-intensive evaporative cooling. Closed-loop liquid systems with CDUs can also help address public concerns about water consumption by limiting make-up water and enabling air-cooled or dry-cooler style heat rejection. At the same time, CDUs provide fine-grained control of flow and pressure to protect servers and power electronics, which is critical as liquid moves closer to boards, chips and battery packs in next-generation architectures.

From a development-trend perspective, the CDU market is moving toward higher-capacity and modular designs, broader support for both liquid-to-liquid and liquid-to-air topologies, and tighter integration with data center infrastructure management and AI-driven control software. The competitive landscape combines large thermal-management vendors with specialized liquid-cooling providers, resulting in a mix of standardized rack-level products and highly customized solutions for hyperscale AI clusters, supercomputing centers and automotive or industrial test benches. There is also ongoing experimentation with alternative architectures, including partial or fully CDU-free configurations, but these remain niche and often require restrictive facility conditions. Overall, CDUs are expected to remain a central building block of mainstream liquid-cooling deployments, with continuing innovation around efficiency, reliability, prefabrication and ease of retrofit.

This report studies the global Coolant Distribution Units (CDU) production, demand, key manufacturers, and key regions.

This report is a detailed and comprehensive analysis of the world market for Coolant Distribution Units (CDU) 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

(CDU) that contribute to its increasing demand across many markets.

### **Highlights and key features of the study**

Global Coolant Distribution Units (CDU) total production and demand, 2021-2032, (Units)

Global Coolant Distribution Units (CDU) total production value, 2021-2032, (USD Million)

Global Coolant Distribution Units (CDU) production by region & country, production, value, CAGR, 2021-2032, (USD Million) & (Units), (based on production site)

Global Coolant Distribution Units (CDU) consumption by region & country, CAGR, 2021-2032 & (Units)

U.S. VS China: Coolant Distribution Units (CDU) domestic production, consumption, key domestic manufacturers and share

Global Coolant Distribution Units (CDU) production by manufacturer, production, price, value and market share 2021-2026, (USD Million) & (Units)

Global Coolant Distribution Units (CDU) production by Type, production, value, CAGR, 2021-2032, (USD Million) & (Units)

Global Coolant Distribution Units (CDU) production by Application, production, value, CAGR, 2021-2032, (USD Million) & (Units)

This report profiles key players in the global Coolant Distribution Units (CDU) 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, Schneider Electric, nVent, CoolIT Systems, Boyd (Eaton), Envicool, Nortek DCC, Delta Electronics, Coolcentric, Nidec, 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 (CDU) 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 Type, 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 (CDU) Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

#### Global Coolant Distribution Units (CDU) Market, Segmentation by Type:

Liquid to Liquid CDU

Liquid to Air CDU

#### Global Coolant Distribution Units (CDU) Market, Segmentation by Installation Level:

Rack-based CDU

Row-based CDU

Other

#### Global Coolant Distribution Units (CDU) Market, Segmentation by Capacity:

Capacity ? 100kW

Capacity ? 100kW

### Global Coolant Distribution Units (CDU) Market, Segmentation by Application:

Internet

Telecommunications

Finance

Government

Others

### Companies Profiled:

Vertiv

Schneider Electric

nVent

CoolIT Systems

Boyd (Eaton)

Envicool

Nortek DCC

Delta Electronics

Coolcentric

Nidec

DCX

Chillydyne (Daikin)

Kehua Data

**Key Questions Answered:**

1. How big is the global Coolant Distribution Units (CDU) market?
2. What is the demand of the global Coolant Distribution Units (CDU) market?
3. What is the year over year growth of the global Coolant Distribution Units (CDU) market?
4. What is the production and production value of the global Coolant Distribution Units (CDU) market?
5. Who are the key producers in the global Coolant Distribution Units (CDU) market?
6. What are the growth factors driving the market demand?

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