

Global High-density Data Center Coolant Distribution Unit (CDU) Supply, Demand and Key Producers, 2026-2032

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Abstracts

The global High-density Data Center Coolant Distribution Unit (CDU) market size is expected to reach \$ 5981 million by 2032, rising at a market growth of 23.7% CAGR during the forecast period (2026-2032).

A high-density data center Coolant Distribution Unit (CDU) is a mission-critical liquid-cooling infrastructure device designed to manage the secondary technology cooling loop between facility-side heat rejection systems and IT-side liquid-cooled equipment. It typically integrates heat exchangers, redundant pumps, valves, filtration, sensors, controls, monitoring interfaces and safety logic to regulate coolant flow, supply temperature, pressure, water quality isolation, alarm handling and operational stability. The equipment is primarily deployed in AI data centers, high-performance computing facilities, hyperscale cloud data halls, colocation environments and high-density enterprise sites where traditional air cooling is no longer sufficient for modern GPU and accelerated-compute workloads. Product formats include rack-mounted CDUs, in-row CDUs, liquid-to-liquid CDUs, liquid-to-air CDUs, facility-level or skid-mounted CDUs, and modular scalable CDU platforms. Typical applications include direct-to-chip cold-plate cooling, rear-door heat exchangers, selected immersion-cooling loops and hybrid liquid/air cooling architectures. Indicative commercial pricing ranges from tens of thousands of US dollars for small rack-level systems to several hundred thousand or more than one million US dollars for megawatt-scale, redundant and highly customised data-hall platforms.

According to our latest findings, the high-density data centre liquid cooling Coolant Distribution Unit (CDU) has transitioned decisively from its historical classification as a mere ancillary apparatus within traditional computer room air conditioning (CRAC)

frameworks into a critical control node of modern AI compute infrastructure. The fundamental commercial and technical nature of this sector extends far beyond the rudimentary addition of a pump and a heat exchanger; rather, it establishes a controllable, closely monitored, redundant, and operationally viable thermal management boundary between the primary facility water system and the secondary IT cooling loop. As the thermal design power of next-generation GPU servers, AI training clusters, and high-density inference architectures continues to escalate, direct-to-chip cold-plate liquid cooling is emerging as the most definitive technical pathway for large-scale deployment. Consequently, the CDU has become the linchpin component connecting cold plates, manifolds, primary facility cold sources, and overarching operational control systems. Distinct from traditional assets such as chillers, cooling towers, and CRAH/CRAC units, the CDU operates in far greater proximity to the active IT load, with its intrinsic investment value predominantly realised through precise temperature regulation, dynamic flow scheduling, fluid-quality isolation, differential pressure management, mitigation of leakage risks, and closed-loop operational data telemetry.

From a global supply architecture perspective, the competitive landscape is crystallising into a tripartite structure wherein three distinct categories of market participants coexist. The first cohort comprises legacy data centre infrastructure and HVAC titans, including Vertiv, Schneider Electric/Motivair, STULZ, nVent, Trane, Johnson Controls, Modine/Airedale, and Daikin/Chilidyne, whose competitive advantages reside in their established global customer relationships, extensive engineering delivery capabilities, comprehensive service networks, and rigorous credentials for large-scale project execution. The second cohort consists of liquid cooling domain specialists, such as CoolIT, LiquidStack, JetCool, Accelsius, GRC, Submer, and ZutaCore, who differentiate themselves through deep technological prowess in cold plates, two-phase and immersion liquid cooling, modular CDUs, and rapid product iteration cycles. The third cohort is formed of Asian suppliers, notably Delta, Envicool, Shenling, Cooltech, Kehua, Sugon Energy, and Kaori, whose operational strengths lie in manufacturing responsiveness, stringent cost containment, localized delivery, and deep integration with the broader server and data centre ecosystems. It is worth noting that certain structural discrepancies exist between the core authoritative vendor list and the broader supplier pool, primarily because several enterprises provide fully integrated liquid cooling systems, immersion tanks, or comprehensive server rack solutions, rendering pure-play CDU revenues difficult to isolate on a standalone basis.

Regarding the structure of demand, short-term growth is overwhelmingly propelled by AI training clusters, hyperscale cloud GPU deployments, intelligent computing hubs,

supercomputing centres, and high-density colocation facilities. On the regulatory front, Chinese policy frameworks provide explicit, structured backing for green, low-carbon data centres, PUE optimization, and highly efficient cooling and heat-dissipation technologies. Notably, the Special Action Plan for Green and Low-Carbon Development of Data Centres advocates the tailored adoption of liquid cooling, evaporative cooling, heat pipes, and fluorine pumps, alongside maximizing the utilisation of natural economizers. This implies that the demand for CDUs is not merely driven by the linear substitution of a standalone technology, but is rather the confluence of computational density, energy grid constraints, stringent environmental mandates, and broader data centre capital investment cycles. The concurrent expansion of AI-optimised data centres across the United States, Europe, China, and Southeast Asia will collectively catalyse the transition of the CDU market away from bespoke, low-volume, project-specific frameworks toward standardized, modular, and industrial-scale delivery paradigms.

In terms of product evolution, the industry is witnessing a significant architectural migration away from 50?300kW rack-mounted units towards centralized and modular platforms operating at scales of 1MW, 2MW, and indeed up to 10MW. Market evidence underscores this structural shift: Motivair/Schneider Electric have disclosed standalone 2.5MW units capable of scaling to over 10MW in combination; LiquidStack has launched its GigaModular CDU, which scales up to 10MW; CoolIT has introduced the 2MW-class CHx2000; Trane has revealed capacities reaching up to 14MW; and Silent-Aire has highlighted a scalable platform spanning 500kW to 10MW. Consequently, the vector of competition is pivoting away from raw, standalone cooling capacity. Future market differentiation will hinge decisively upon system pressure drops, redundant architectures, pump energy efficiency, approach temperature differentials, rapid-maintenance protocols, fluid-quality management, standardized interfaces, delivery lead times, and seamless integration with overarching data centre control systems.

Finally, turning to market dynamics, corporate consolidation and capital expenditure have become pivotal catalysts in reshaping the industry structure. Schneider Electric's acquisition of a majority stake in Motivair, Daikin's acquisition of Chillydyne, and Johnson Controls' reinforcement of its Silent-Aire platform all clearly demonstrate that traditional infrastructure giants are aggressively addressing their liquid cooling capability gaps through non-organic M&A alongside internal research and development. Concurrently, domain specialists such as CoolIT, LiquidStack, JetCool, and Accelsius maintain distinct growth resilience by leveraging their direct relationships with AI/HPC clients and highly differentiated product offerings. Over the next three to five years, we anticipate market consolidation to unfold along two structural vectors: first, tier-one data centre operators will increasingly gravitate towards integrated vendors possessing

global delivery networks, robust warranty frameworks, and balance-sheet bankability; second, specialized technological domains?such as two-phase, negative-pressure, non-water-based dielectric, and immersion liquid cooling?will continue to preserve an innovative ecosystem for agile specialists. Key structural risks facing the sector include shifting standardization protocols for server-level liquid cooling interfaces, the trend towards proprietary in-house rack designs by major hyperscalers, primary-side cold source architectural changes that could marginalize certain CDU typologies, and intensifying price competition which threatens to compress the margins of mid-tier and smaller manufacturers.

This report studies the global High-density Data Center Coolant Distribution Unit (CDU) production, demand, key manufacturers, and key regions.

This report is a detailed and comprehensive analysis of the world market for High-density Data Center Coolant Distribution Unit (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 High-density Data Center Coolant Distribution Unit (CDU) that contribute to its increasing demand across many markets.

Highlights and key features of the study

Global High-density Data Center Coolant Distribution Unit (CDU) total production and demand, 2021-2032, (Units)

Global High-density Data Center Coolant Distribution Unit (CDU) total production value, 2021-2032, (USD Million)

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

Global High-density Data Center Coolant Distribution Unit (CDU) consumption by region & country, CAGR, 2021-2032 & (Units)

U.S. VS China: High-density Data Center Coolant Distribution Unit (CDU) domestic production, consumption, key domestic manufacturers and share

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

Global High-density Data Center Coolant Distribution Unit (CDU) production by Product Form Factor, production, value, CAGR, 2021-2032, (USD Million) & (Units)

Global High-density Data Center Coolant Distribution Unit (CDU) production by Application, production, value, CAGR, 2021-2032, (USD Million) & (Units)

This report profiles key players in the global High-density Data Center Coolant Distribution Unit (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 Schneider Electric, Vertiv, CoolIT Systems, LiquidStack, Delta Electronics, STULZ, nVent, Trane Technologies, Eaton Boyd Thermal, Daikin Applied, 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 High-density Data Center Coolant Distribution Unit (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 Product Form Factor, 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 High-density Data Center Coolant Distribution Unit (CDU) Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Global High-density Data Center Coolant Distribution Unit (CDU) Market, Segmentation by Product Form Factor:

Rack-mounted CDU

In-row CDU

Facility / Skid-mounted CDU

Other

Global High-density Data Center Coolant Distribution Unit (CDU) Market, Segmentation by Heat Rejection Architecture:

Liquid-to-Liquid CDU

Liquid-to-Air CDU

Hybrid CDU

Other

Global High-density Data Center Coolant Distribution Unit (CDU) Market, Segmentation by Cooling Capacity Class:

Small / Rack-level CDU

Medium / Row-level CDU

Large / Megawatt-class CDU

Other

Global High-density Data Center Coolant Distribution Unit (CDU) Market, Segmentation by Cooling Technology Route:

Direct-to-Chip CDU

Rear-door Heat Exchanger CDU

Immersion Cooling CDU

Other

Global High-density Data Center Coolant Distribution Unit (CDU) Market, Segmentation by Application:

AI Training Data Center

AI Inference / Cloud Data Center

HPC / Supercomputing Center

Enterprise / Edge / Retrofit

Other

Companies Profiled:

Schneider Electric Motivair

Vertiv

CoolIT Systems

LiquidStack

Delta Electronics

STULZ

nVent

Trane Technologies

Eaton Boyd Thermal

Daikin Applied

Modine Airedale

Johnson Controls Silent-Aire

Nortek Data Center Cooling

Rittal

Supermicro

JetCool Flex

Accelsius

DCX Liquid Cooling Systems

GRC

Envicool

Shenling

Goaland

Kehua Data

Sugon DataEnergy

Kaori

Tecnair

Submer

Wangsu Green Earth

Key Questions Answered:

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

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