

Global Integrated In-Rack CDUs Supply, Demand and Key Producers, 2026-2032

<https://marketpublishers.com/r/GB553AD288BAEN.html>

Date: April 2026

Pages: 134

Price: US\$ 4,480.00 (Single User License)

ID: GB553AD288BAEN

Abstracts

The global Integrated In-Rack CDUs market size is expected to reach \$ 2548 million by 2032, rising at a market growth of 17.7% 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. Integrated In-Rack CDUs are optimized to efficiently and seamlessly integrate into a large, high power device like a data center server chassis. Server rack cooling is easy to use with CDU installation instructions as simple as completing the liquid loop, filling the liquid reservoir tank, and flipping the switch. These systems offer a fast option to upgrade to liquid cooling in a cost effective and reliable package and can be fully self-contained or integrated into available facility 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 Integrated In-Rack CDUs reached approximately 71 K units, with an average global market price of around US\$ 11 K/unit. Production capacity varies

significantly among manufacturers, with gross profit margins ranging from approximately 30% to 50%.

Fast Market Growth: In the current landscape dominated by AI-driven applications and dense chip architectures, liquid cooling has emerged as a pivotal technology. CDU, as a key part in liquid cooling system, will benefit from the prevalence of AI and high performance computing (HPC). The CDU market is expected to experience fast growth in the coming years.

Intensified Competition: As showing great market potential, many investors and companies have laid their attentions on the CDU market. With more and more companies will enter in the CDU industry, the whole market competition will be intensified in the coming years.

Continued Technology Innovation: CDU include liquid-to-liquid and liquid-to-air types. Though limited in cooling capability compared with liquid-to-liquid CDUs, liquid-to-air CDUs don't require water pipes, can be installed more easily, and take less space and lower initial cost than liquid-to-liquid CDUs. While although liquid-to-liquid CDUs hold the best cooling performance of all types. They require, among others, pipes to be installed to operate with a facility's water. More research and technology innovation will be put on liquid-to-liquid CDUs by CDU manufacturers to provide high performance CDU to data centers.

This report studies the global Integrated In-Rack CDUs production, demand, key manufacturers, and key regions.

This report is a detailed and comprehensive analysis of the world market for Integrated In-Rack CDUs 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 Integrated In-Rack CDUs that contribute to its increasing demand across many markets.

Highlights and key features of the study

Global Integrated In-Rack CDUs total production and demand, 2021-2032, (Units)

Global Integrated In-Rack CDUs total production value, 2021-2032, (USD Million)

Global Integrated In-Rack CDUs production by region & country, production, value, CAGR, 2021-2032, (USD Million) & (Units), (based on production site)

Global Integrated In-Rack CDUs consumption by region & country, CAGR, 2021-2032 & (Units)

U.S. VS China: Integrated In-Rack CDUs domestic production, consumption, key domestic manufacturers and share

Global Integrated In-Rack CDUs production by manufacturer, production, price, value and market share 2021-2026, (USD Million) & (Units)

Global Integrated In-Rack CDUs production by Type, production, value, CAGR, 2021-2032, (USD Million) & (Units)

Global Integrated In-Rack CDUs production by Application, production, value, CAGR, 2021-2032, (USD Million) & (Units)

This report profiles key players in the global Integrated In-Rack CDUs 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 Integrated In-Rack CDUs 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 Integrated In-Rack CDUs Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Global Integrated In-Rack CDUs Market, Segmentation by Type:

Liquid to Air CDU

Liquid to Liquid CDU

Global Integrated In-Rack CDUs Market, Segmentation by Capacity:

Capacity ? 100kW

Capacity ? 100kW

Global Integrated In-Rack CDUs Market, Segmentation by Deployment Scenario:

New Build Data Center Type

Retrofit Data Center Type

Global Integrated In-Rack CDUs Market, Segmentation by Application:

Internet

Telecommunications

Finance

Government

Other

Companies Profiled:

Vertiv

Schneider Electric

nVent

CoolIT Systems

Boyd (Eaton)

Envicool

Nortek DCC

Delta Electronics

Coolcentric

Nidec

DCX

Kehua Data

Key Questions Answered:

1. How big is the global Integrated In-Rack CDUs market?
2. What is the demand of the global Integrated In-Rack CDUs market?
3. What is the year over year growth of the global Integrated In-Rack CDUs market?
4. What is the production and production value of the global Integrated In-Rack CDUs market?
5. Who are the key producers in the global Integrated In-Rack CDUs market?

6. What are the growth factors driving the market demand?

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