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Global Liquid-to-Air Coolant Distribution Unit (CDU) Supply, Demand and Key Producers, 2026-2032

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Abstracts

The global Liquid-to-Air Coolant Distribution Unit (CDU) market size is expected to reach $ 1476 million by 2032, rising at a market growth of 16.8% 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. Many facilities are not designed for system-wide liquid cooling, so Liquid-to-Air CDUs provide the benefits of liquid cooling without the full-scale implementation of facility water.

A Liquid-to-Air CDU sits between the IT liquid loop and the air-side heat rejection section, so its upstream supply chain is mainly a combination of mechanical, thermal, fluid, and control components. On the downstream side, Liquid-to-Air Coolant Distribution Units are used in high-density data center liquid cooling deployments, especially for direct-to-chip cold plate loops, rear-door heat exchanger (RDHx) support, and mixed rack cooling architectures in AI/HPC, hyperscale, colocation, and retrofit projects, particularly where fast deployment and limited facility-water modifications are important.

In 2025, global sales of Liquid-to-Air Coolant Distribution Unit reached approximately 55.3 K units, with an average global market price of around US$ 8.7 K/unit. Production

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

The market outlook for Liquid-to-Air CDUs is structurally positive because they address a practical adoption gap in data center liquid cooling: operators want to support higher-density AI/HPC workloads, but many sites cannot immediately deploy large-scale facility water infrastructure upgrades. In this context, L2A CDUs are attractive as a fast-deployment, lower-disruption bridge solution, especially for retrofits and mixed cooling environments. Vendor materials consistently position L2A products as closed-loop systems that simplify deployment and integrate with direct-to-chip cooling while reducing the need for extensive piping changes.

At the same time, L2A CDUs are not a universal replacement for all liquid cooling architectures. Their practical role is strongest where rapid rollout, modularity, and localized heat rejection matter more than maximum centralized heat rejection efficiency. As rack power density rises, operators increasingly prioritize system reliability features?such as filtration, leak detection, pump redundancy, and tighter control strategies?because downtime risk and serviceability become as important as thermal performance. This aligns with vendor feature sets and broader industry guidance emphasizing resiliency in direct liquid cooling deployments.

Market competition is also intensifying across thermal management vendors, infrastructure suppliers, and system integrators, with visible strategic investment and M&A activity around data center cooling capabilities. That reinforces a likely market direction in which L2A CDUs continue to expand as part of a broader liquid-cooling portfolio?particularly in retrofit, edge, and staged-transition projects?while coexisting with higher-capacity liquid-to-liquid architectures in large-scale AI campuses.

This report studies the global Liquid-to-Air Coolant Distribution Unit (CDU) production, demand, key manufacturers, and key regions.

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

Highlights and key features of the study

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Global Liquid-to-Air Coolant Distribution Unit (CDU) total production and demand, 2021-2032, (Units)
Global Liquid-to-Air Coolant Distribution Unit (CDU) total production value, 2021-2032, (USD Million)
Global Liquid-to-Air Coolant Distribution Unit (CDU) production by region & country, production, value, CAGR, 2021-2032, (USD Million) & (Units), (based on production site)
Global Liquid-to-Air Coolant Distribution Unit (CDU) consumption by region & country, CAGR, 2021-2032 & (Units)
U.S. VS China: Liquid-to-Air Coolant Distribution Unit (CDU) domestic production, consumption, key domestic manufacturers and share
Global Liquid-to-Air Coolant Distribution Unit (CDU) production by manufacturer, production, price, value and market share 2021-2026, (USD Million) & (Units)
Global Liquid-to-Air Coolant Distribution Unit (CDU) production by Type, production, value, CAGR, 2021-2032, (USD Million) & (Units)
Global Liquid-to-Air Coolant Distribution Unit (CDU) production by Application, production, value, CAGR, 2021-2032, (USD Million) & (Units)

This report profiles key players in the global Liquid-to-Air 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 Vertiv, CoolIT Systems, Boyd (Eaton), Envicool, Nortek DCC, Delta Electronics, Coolcentric, Nidec, Kehua Data, 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 Liquid-to-Air 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 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.

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Global Liquid-to-Air Coolant Distribution Unit (CDU) Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Global Liquid-to-Air Coolant Distribution Unit (CDU) Market, Segmentation by Type:

Rack-based CDU

Row-based CDU

Global Liquid-to-Air Coolant Distribution Unit (CDU) Market, Segmentation by Capacity:

Capacity ? 100kW

Capacity ? 100kW

Global Liquid-to-Air Coolant Distribution Unit (CDU) Market, Segmentation by Heat Rejection Architecture:

Self-Contained Fan-Coil Type

Ducted Airflow Type

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Room-Air Recirculation Type

Other

Global Liquid-to-Air Coolant Distribution Unit (CDU) Market, Segmentation by Application:

Internet

Telecommunications

Finance

Government

Others

Companies Profiled:

Vertiv

CoolIT Systems

Boyd (Eaton)

Envicool

Nortek DCC

Delta Electronics

Coolcentric

Nidec

Kehua Data

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Key Questions Answered:

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

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