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Global Liquid-to-Air Coolant Distribution Unit (CDU) Market 2026 by Manufacturers, Regions, Type and Application, Forecast to 2032

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Abstracts

According to our (Global Info Research) latest study, the global Liquid-to-Air Coolant Distribution Unit (CDU) market size was valued at US$ 494 million in 2025 and is forecast to a readjusted size of US$ 1476 million by 2032 with a CAGR of 16.8% during review period.

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.

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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 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 is a detailed and comprehensive analysis for global Liquid-to-Air Coolant Distribution Unit (CDU) market. Both quantitative and qualitative analyses are presented by manufacturers, by region & country, by Type and by Application. As the market is constantly changing, this report explores the competition, supply and demand trends, as well as key factors that contribute to its changing demands across many markets. Company profiles and product examples of selected competitors, along with market share estimates of some of the selected leaders for the year 2025, are provided.

Key Features:

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Global Liquid-to-Air Coolant Distribution Unit (CDU) market size and forecasts, in consumption value ($ Million), sales quantity (Units), and average selling prices (US$/Unit), 2021-2032

Global Liquid-to-Air Coolant Distribution Unit (CDU) market size and forecasts by region and country, in consumption value ($ Million), sales quantity (Units), and average selling prices (US$/Unit), 2021-2032

Global Liquid-to-Air Coolant Distribution Unit (CDU) market size and forecasts, by Type and by Application, in consumption value ($ Million), sales quantity (Units), and average selling prices (US$/Unit), 2021-2032

Global Liquid-to-Air Coolant Distribution Unit (CDU) market shares of main players, shipments in revenue ($ Million), sales quantity (Units), and ASP (US$/Unit), 2021-2026

The Primary Objectives in This Report Are:

To determine the size of the total market opportunity of global and key countries

To assess the growth potential for Liquid-to-Air Coolant Distribution Unit (CDU)

To forecast future growth in each product and end-use market

To assess competitive factors affecting the marketplace

This report profiles key players in the global Liquid-to-Air Coolant Distribution Unit (CDU) market based on the following parameters - company overview, sales quantity, revenue, 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.

Market Segmentation

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Liquid-to-Air Coolant Distribution Unit (CDU) market is split by Type and by Application. For the period 2021-2032, the growth among segments provides accurate calculations and forecasts for consumption value by Type, and by Application in terms of volume and value. This analysis can help you expand your business by targeting qualified niche markets.

Market segment by Type

Rack-based CDU

Row-based CDU

Market segment by Capacity

Capacity ? 100kW

Capacity ? 100kW

Market segment by Heat Rejection Architecture

Self-Contained Fan-Coil Type

Ducted Airflow Type

Room-Air Recirculation Type

Other

Market segment by Application

Internet

Telecommunications

Finance

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Government

Others

Major players covered

Vertiv

CoolIT Systems

Boyd (Eaton)

Envicool

Nortek DCC

Delta Electronics

Coolcentric

Nidec

Kehua Data

Market segment by region, regional analysis covers

North America (United States, Canada, and Mexico)

Europe (Germany, France, United Kingdom, Russia, Italy, and Rest of Europe)

Asia-Pacific (China, Japan, Korea, India, Southeast Asia, and Australia)

South America (Brazil, Argentina, Colombia, and Rest of South America)

Middle East & Africa (Saudi Arabia, UAE, Egypt, South Africa, and Rest of Middle East & Africa)

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The content of the study subjects, includes a total of 15 chapters:

Chapter 1, to describe Liquid-to-Air Coolant Distribution Unit (CDU) product scope, market overview, market estimation caveats and base year.

Chapter 2, to profile the top manufacturers of Liquid-to-Air Coolant Distribution Unit (CDU), with price, sales quantity, revenue, and global market share of Liquid-to-Air Coolant Distribution Unit (CDU) from 2021 to 2026.

Chapter 3, the Liquid-to-Air Coolant Distribution Unit (CDU) competitive situation, sales quantity, revenue, and global market share of top manufacturers are analyzed emphatically by landscape contrast.

Chapter 4, the Liquid-to-Air Coolant Distribution Unit (CDU) breakdown data are shown at the regional level, to show the sales quantity, consumption value, and growth by regions, from 2021 to 2032.

Chapter 5 and 6, to segment the sales by Type and by Application, with sales market share and growth rate by Type, by Application, from 2021 to 2032.

Chapter 7, 8, 9, 10 and 11, to break the sales data at the country level, with sales quantity, consumption value, and market share for key countries in the world, from 2021 to 2026.and Liquid-to-Air Coolant Distribution Unit (CDU) market forecast, by regions, by Type, and by Application, with sales and revenue, from 2027 to 2032.

Chapter 12, market dynamics, drivers, restraints, trends, and Porters Five Forces analysis.

Chapter 13, the key raw materials and key suppliers, and industry chain of Liquid-to-Air Coolant Distribution Unit (CDU).

Chapter 14 and 15, to describe Liquid-to-Air Coolant Distribution Unit (CDU) sales channel, distributors, customers, research findings and conclusion.

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