

Global Rack Mount CDU Supply, Demand and Key Producers, 2026-2032

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Abstracts

The global Rack Mount CDU 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.

Rack Mount 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 Rack Mount CDU 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%.

The growth of Rack Mount Coolant Distribution Units (CDUs) is being driven by the rising prevalence of high-density computing workloads such as high-performance computing (HPC), artificial intelligence training, and GPU-based clusters. These workloads generate substantial heat, necessitating precise, localized cooling solutions. Rack Mount CDUs address this need by integrating cooling capabilities directly within the server rack, enabling minimal thermal loss and faster thermal response times. Their compact, embedded form also aligns well with the ongoing shift toward modular infrastructure and edge computing deployments, where space, scalability, and rapid installation are critical.

Despite their advantages, the adoption of Rack Mount CDUs faces several technical and systemic hurdles. One of the main challenges lies in the complexity of integrating multiple components—including pumps, heat exchangers, and control systems—within a confined rack space. This integration raises the bar for thermal design, mechanical integrity, and electrical safety, increasing design and manufacturing costs. Additionally, their placement within the rack environment exposes them to constraints such as vibration, acoustic limitations, and electromagnetic interference, which can impact long-term reliability. Furthermore, in legacy data centers where air cooling is still dominant, there remains limited familiarity with in-rack liquid distribution, posing challenges to operations and maintenance training.

Nonetheless, significant opportunities lie ahead for Rack Mount CDUs, particularly in environments where rack space efficiency and thermal precision are critical. Their proximity to heat sources and modular, embedded design make them ideal for future-ready green data centers and intelligent edge nodes. As the ecosystem of liquid cooling components matures and standardization improves, Rack Mount CDUs are expected to become more plug-and-play, interoperable, and easier to deploy across a range of infrastructures. In advanced workloads that demand ultra-precise cooling—such as AI, scientific computing, or financial analytics—Rack Mount CDUs are well-positioned to become a foundational element of next-generation thermal management strategies.

This report studies the global Rack Mount CDU production, demand, key manufacturers, and key regions.

This report is a detailed and comprehensive analysis of the world market for Rack

Mount 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 Rack Mount CDU that contribute to its increasing demand across many markets.

Highlights and key features of the study

Global Rack Mount CDU total production and demand, 2021-2032, (Units)

Global Rack Mount CDU total production value, 2021-2032, (USD Million)

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

Global Rack Mount CDU consumption by region & country, CAGR, 2021-2032 & (Units)

U.S. VS China: Rack Mount CDU domestic production, consumption, key domestic manufacturers and share

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

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

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

This report profiles key players in the global Rack Mount 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, nVent, Nidec, CoolIT Systems, Delta Electronics, Envicool, Boyd (Eaton), Nortek DCC, Coolcentric, DCX, 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 Rack Mount 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 Rack Mount CDU Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Global Rack Mount CDU Market, Segmentation by Type:

Liquid to Air CDU

Liquid to Liquid CDU

Global Rack Mount CDU Market, Segmentation by Capacity:

Capacity ? 100kW

Capacity ? 100kW

Global Rack Mount CDU Market, Segmentation by Deployment Scenario:

New Build Data Center Type

Retrofit Data Center Type

Global Rack Mount CDU Market, Segmentation by Application:

Internet

Telecommunications

Finance

Government

Other

Companies Profiled:

Vertiv

nVent

Nidec

CoolIT Systems

Delta Electronics

Envicool

Boyd (Eaton)

Nortek DCC

Coolcentric

DCX

Kehua Data

Key Questions Answered:

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

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