

Global Rack Mount CDU Market 2026 by Manufacturers, Regions, Type and Application, Forecast to 2032

<https://marketpublishers.com/r/G6683A74294EEN.html>

Date: April 2026

Pages: 117

Price: US\$ 3,480.00 (Single User License)

ID: G6683A74294EEN

Abstracts

According to our (Global Info Research) latest study, the global Rack Mount CDU market size was valued at US\$ 807 million in 2025 and is forecast to a readjusted size of US\$ 2548 million by 2032 with a CAGR of 17.7% 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.

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 is a detailed and comprehensive analysis for global Rack Mount 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:

Global Rack Mount CDU market size and forecasts, in consumption value (\$ Million), sales quantity (Units), and average selling prices (US\$/Unit), 2021-2032

Global Rack Mount 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 Rack Mount 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 Rack Mount 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 Rack Mount 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 Rack Mount 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, 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.

Market Segmentation

Rack Mount 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

Liquid to Air CDU

Liquid to Liquid CDU

Market segment by Capacity

Capacity ? 100kW

Capacity ? 100kW

Market segment by Deployment Scenario

New Build Data Center Type

Retrofit Data Center Type

Market segment by Application

Internet

Telecommunications

Finance

Government

Other

Major players covered

Vertiv

nVent

Nidec

CoolIT Systems

Delta Electronics

Envicool

Boyd (Eaton)

Nortek DCC

Coolcentric

DCX

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)

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

Chapter 1, to describe Rack Mount CDU product scope, market overview, market estimation caveats and base year.

Chapter 2, to profile the top manufacturers of Rack Mount CDU, with price, sales quantity, revenue, and global market share of Rack Mount CDU from 2021 to 2026.

Chapter 3, the Rack Mount CDU competitive situation, sales quantity, revenue, and global market share of top manufacturers are analyzed emphatically by landscape contrast.

Chapter 4, the Rack Mount 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 Rack Mount 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 Rack Mount CDU.

Chapter 14 and 15, to describe Rack Mount CDU sales channel, distributors, customers, research findings and conclusion.

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