

Global Air-to-Liquid Coolant Distribution Unit (CDU) Market Growth 2026-2032

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Abstracts

The global Air-to-Liquid Coolant Distribution Unit (CDU) market size is predicted to grow from US\$ 2764 million in 2025 to US\$ 12120 million in 2032; it is expected to grow at a CAGR of 23.4% from 2026 to 2032.

An Air-to-Liquid Coolant Distribution Unit (CDU) is a specialized data center cooling system that transfers heat from IT equipment (servers, GPUs, high-density racks) to a liquid coolant loop. It typically includes pumps, heat exchangers, sensors, valves, and control units to manage fluid flow, temperature, and pressure, ensuring efficient and reliable thermal management for high-performance or high-density computing environments. In 2025, global CDU production reached approximately 63 K units, with an average global market price of around US\$ 45,000 per unit. Annual production capacity is 65 K units. Gross Profit Margin: 23%. The Air-to-Liquid CDU industry chain is structured with clear upstream, midstream, and downstream segments. Upstream primarily includes raw material suppliers such as high-grade metals, pumps, sensors, and control electronics. Midstream focuses on CDU manufacturers who integrate these components into complete liquid cooling systems. Downstream consists of data center operators, cloud service providers, and HPC facilities that deploy these CDUs to enhance cooling efficiency and reliability. Global market dynamics are increasingly shaped by demand from hyperscale and AI-focused data centers, driving innovation in modularity, smart controls, and energy efficiency. Air-to-Liquid CDUs represent a critical technology for next-generation data centers. As AI, HPC, and edge computing workloads grow, traditional air cooling is increasingly insufficient. Liquid cooling via CDUs not only improves thermal performance but also enables higher server densities, reduced energy consumption, and more flexible deployment. Investing in CDUs offers a strategic advantage for data centers seeking efficiency, reliability, and scalability, and I believe adoption will accelerate rapidly in the next five to ten years.

United States market for Air-to-Liquid Coolant Distribution Unit (CDU) is estimated to increase from US\$ million in 2025 to US\$ million by 2032, at a CAGR of % from 2026 through 2032.

China market for Air-to-Liquid Coolant Distribution Unit (CDU) is estimated to increase from US\$ million in 2025 to US\$ million by 2032, at a CAGR of % from 2026 through 2032.

Europe market for Air-to-Liquid Coolant Distribution Unit (CDU) is estimated to increase from US\$ million in 2025 to US\$ million by 2032, at a CAGR of % from 2026 through 2032.

Global key Air-to-Liquid Coolant Distribution Unit (CDU) players cover Vertiv Holdings Co., Ltd., Schneider Electric SE, nVent Thermal / nVent RAYCHEM, CoolIT Systems Inc., Boyd Corporation, etc. In terms of revenue, the global two largest companies occupied for a share nearly % in 2025.

LP Information, Inc. (LPI) ' newest research report, the ?Air-to-Liquid Coolant Distribution Unit (CDU) Industry Forecast? looks at past sales and reviews total world Air-to-Liquid Coolant Distribution Unit (CDU) sales in 2025, providing a comprehensive analysis by region and market sector of projected Air-to-Liquid Coolant Distribution Unit (CDU) sales for 2026 through 2032. With Air-to-Liquid Coolant Distribution Unit (CDU) sales broken down by region, market sector and sub-sector, this report provides a detailed analysis in US\$ millions of the world Air-to-Liquid Coolant Distribution Unit (CDU) industry.

This Insight Report provides a comprehensive analysis of the global Air-to-Liquid Coolant Distribution Unit (CDU) landscape and highlights key trends related to product segmentation, company formation, revenue, and market share, latest development, and M&A activity. This report also analyzes the strategies of leading global companies with a focus on Air-to-Liquid Coolant Distribution Unit (CDU) portfolios and capabilities, market entry strategies, market positions, and geographic footprints, to better understand these firms' unique position in an accelerating global Air-to-Liquid Coolant Distribution Unit (CDU) market.

This Insight Report evaluates the key market trends, drivers, and affecting factors shaping the global outlook for Air-to-Liquid Coolant Distribution Unit (CDU) and breaks down the forecast by Cooling Capacity, by Application, geography, and market size to

highlight emerging pockets of opportunity. With a transparent methodology based on hundreds of bottom-up qualitative and quantitative market inputs, this study forecast offers a highly nuanced view of the current state and future trajectory in the global Air-to-Liquid Coolant Distribution Unit (CDU).

This report presents a comprehensive overview, market shares, and growth opportunities of Air-to-Liquid Coolant Distribution Unit (CDU) market by product type, application, key manufacturers and key regions and countries.

Segmentation by Cooling Capacity:

Low-capacity CDU (≤ 50 kW)

Medium-capacity CDU (50-200 kW)

High-capacity CDU (>200 kW)

Segmentation by Installation Type:

Rack-mounted Air-to-Liquid CDU

In-row Air-to-Liquid CDU

Room-level Air-to-Liquid CDU

Segmentation by System Architecture:

Standalone Closed-loop Air-to-Liquid CDU

Facility-coupled Air-to-Liquid CDU

Segmentation by Application:

Edge Data Center CDU

Enterprise Data Center CDU

Hyperscale Data Center CDU

HPC CDU

Others

This report also splits the market by region:

Americas

United States

Canada

Mexico

Brazil

APAC

China

Japan

Korea

Southeast Asia

India

Australia

Europe

Germany

France

UK

Italy

Russia

Middle East & Africa

Egypt

South Africa

Israel

Turkey

GCC Countries

The below companies that are profiled have been selected based on inputs gathered from primary experts and analysing the company's coverage, product portfolio, its market penetration.

Vertiv Holdings Co., Ltd.

Schneider Electric SE

nVent Thermal / nVent RAYCHEM

CoolIT Systems Inc.

Boyd Corporation

Rittal GmbH & Co. KG

Stulz GmbH

DCX Liquid Cooling Systems

Submer Technologies S.L.

Asetek A/S

Chillydyne, Inc.

Delta Electronics, Inc.

Motivair Corporation

Coolcentric

Nidec Corporation

Airedale International Air Conditioning Ltd

Midas Green Technologies

Johnson Controls Intl

Daikin Applied

Trane Technologies

Key Questions Addressed in this Report

What is the 10-year outlook for the global Air-to-Liquid Coolant Distribution Unit (CDU) market?

What factors are driving Air-to-Liquid Coolant Distribution Unit (CDU) market growth, globally and by region?

Which technologies are poised for the fastest growth by market and region?

How do Air-to-Liquid Coolant Distribution Unit (CDU) market opportunities vary by end market size?

How does Air-to-Liquid Coolant Distribution Unit (CDU) break out by Cooling Capacity, by Application?

Contents

1 SCOPE OF THE REPORT

- 1.1 Market Introduction
- 1.2 Years Considered
- 1.3 Research Objectives
- 1.4 Market Research Methodology
- 1.5 Research Process and Data Source
- 1.6 Economic Indicators
- 1.7 Currency Considered
- 1.8 Market Estimation Caveats

2 EXECUTIVE SUMMARY

2.1 World Market Overview

- 2.1.1 Global Air-to-Liquid Coolant Distribution Unit (CDU) Annual Sales 2021-2032
- 2.1.2 World Current & Future Analysis for Air-to-Liquid Coolant Distribution Unit (CDU) by Geographic Region, 2021, 2025 & 2032
- 2.1.3 World Current & Future Analysis for Air-to-Liquid Coolant Distribution Unit (CDU) by Country/Region, 2021, 2025 & 2032

2.2 Air-to-Liquid Coolant Distribution Unit (CDU) Segment by Cooling Capacity

- 2.2.1 Low-capacity CDU (<50 kW)
- 2.2.2 Medium-capacity CDU (50-200 kW)
- 2.2.3 High-capacity CDU (>200 kW)
- 2.2.4 Air-to-Liquid Coolant Distribution Unit (CDU) Sales by Cooling Capacity
 - 2.2.4.1 Global Air-to-Liquid Coolant Distribution Unit (CDU) Sales Market Share by Cooling Capacity (2021-2026)
 - 2.2.4.2 Global Air-to-Liquid Coolant Distribution Unit (CDU) Revenue and Market Share by Cooling Capacity (2021-2026)
 - 2.2.4.3 Global Air-to-Liquid Coolant Distribution Unit (CDU) Sale Price by Cooling Capacity (2021-2026)

2.3 Air-to-Liquid Coolant Distribution Unit (CDU) Segment by Installation Type

- 2.3.1 Rack-mounted Air-to-Liquid CDU
- 2.3.2 In-row Air-to-Liquid CDU
- 2.3.3 Room-level Air-to-Liquid CDU
- 2.3.4 Air-to-Liquid Coolant Distribution Unit (CDU) Sales by Installation Type
 - 2.3.4.1 Global Air-to-Liquid Coolant Distribution Unit (CDU) Sales Market Share by Installation Type (2021-2026)

2.3.4.2 Global Air-to-Liquid Coolant Distribution Unit (CDU) Revenue and Market Share by Installation Type (2021-2026)

2.3.4.3 Global Air-to-Liquid Coolant Distribution Unit (CDU) Sale Price by Installation Type (2021-2026)

2.4 Air-to-Liquid Coolant Distribution Unit (CDU) Segment by System Architecture

2.4.1 Standalone Closed-loop Air-to-Liquid CDU

2.4.2 Facility-coupled Air-to-Liquid CDU

2.4.3 Air-to-Liquid Coolant Distribution Unit (CDU) Sales by System Architecture

2.4.3.1 Global Air-to-Liquid Coolant Distribution Unit (CDU) Sales Market Share by System Architecture (2021-2026)

2.4.3.2 Global Air-to-Liquid Coolant Distribution Unit (CDU) Revenue and Market Share by System Architecture (2021-2026)

2.4.3.3 Global Air-to-Liquid Coolant Distribution Unit (CDU) Sale Price by System Architecture (2021-2026)

2.5 Air-to-Liquid Coolant Distribution Unit (CDU) Segment by Application

2.5.1 Edge Data Center CDU

2.5.2 Enterprise Data Center CDU

2.5.3 Hyperscale Data Center CDU

2.5.4 HPC CDU

2.5.5 Others

2.5.6 Air-to-Liquid Coolant Distribution Unit (CDU) Sales by Application

2.5.6.1 Global Air-to-Liquid Coolant Distribution Unit (CDU) Sale Market Share by Application (2021-2026)

2.5.6.2 Global Air-to-Liquid Coolant Distribution Unit (CDU) Revenue and Market Share by Application (2021-2026)

2.5.6.3 Global Air-to-Liquid Coolant Distribution Unit (CDU) Sale Price by Application (2021-2026)

3 GLOBAL BY COMPANY

3.1 Global Air-to-Liquid Coolant Distribution Unit (CDU) Breakdown Data by Company

3.1.1 Global Air-to-Liquid Coolant Distribution Unit (CDU) Annual Sales by Company (2021-2026)

3.1.2 Global Air-to-Liquid Coolant Distribution Unit (CDU) Sales Market Share by Company (2021-2026)

3.2 Global Air-to-Liquid Coolant Distribution Unit (CDU) Annual Revenue by Company (2021-2026)

3.2.1 Global Air-to-Liquid Coolant Distribution Unit (CDU) Revenue by Company (2021-2026)

3.2.2 Global Air-to-Liquid Coolant Distribution Unit (CDU) Revenue Market Share by Company (2021-2026)

3.3 Global Air-to-Liquid Coolant Distribution Unit (CDU) Sale Price by Company

3.4 Key Manufacturers Air-to-Liquid Coolant Distribution Unit (CDU) Producing Area Distribution, Sales Area, Product Type

3.4.1 Key Manufacturers Air-to-Liquid Coolant Distribution Unit (CDU) Product Location Distribution

3.4.2 Players Air-to-Liquid Coolant Distribution Unit (CDU) Products Offered

3.5 Market Concentration Rate Analysis

3.5.1 Competition Landscape Analysis

3.5.2 Concentration Ratio (CR3, CR5 and CR10) & (2024-2026)

3.6 New Products and Potential Entrants

3.7 Market M&A Activity & Strategy

4 WORLD HISTORIC REVIEW FOR AIR-TO-LIQUID COOLANT DISTRIBUTION UNIT (CDU) BY GEOGRAPHIC REGION

4.1 World Historic Air-to-Liquid Coolant Distribution Unit (CDU) Market Size by Geographic Region (2021-2026)

4.1.1 Global Air-to-Liquid Coolant Distribution Unit (CDU) Annual Sales by Geographic Region (2021-2026)

4.1.2 Global Air-to-Liquid Coolant Distribution Unit (CDU) Annual Revenue by Geographic Region (2021-2026)

4.2 World Historic Air-to-Liquid Coolant Distribution Unit (CDU) Market Size by Country/Region (2021-2026)

4.2.1 Global Air-to-Liquid Coolant Distribution Unit (CDU) Annual Sales by Country/Region (2021-2026)

4.2.2 Global Air-to-Liquid Coolant Distribution Unit (CDU) Annual Revenue by Country/Region (2021-2026)

4.3 Americas Air-to-Liquid Coolant Distribution Unit (CDU) Sales Growth

4.4 APAC Air-to-Liquid Coolant Distribution Unit (CDU) Sales Growth

4.5 Europe Air-to-Liquid Coolant Distribution Unit (CDU) Sales Growth

4.6 Middle East & Africa Air-to-Liquid Coolant Distribution Unit (CDU) Sales Growth

5 AMERICAS

5.1 Americas Air-to-Liquid Coolant Distribution Unit (CDU) Sales by Country

5.1.1 Americas Air-to-Liquid Coolant Distribution Unit (CDU) Sales by Country (2021-2026)

5.1.2 Americas Air-to-Liquid Coolant Distribution Unit (CDU) Revenue by Country
(2021-2026)

5.2 Americas Air-to-Liquid Coolant Distribution Unit (CDU) Sales by Cooling Capacity
(2021-2026)

5.3 Americas Air-to-Liquid Coolant Distribution Unit (CDU) Sales by Application
(2021-2026)

5.4 United States

5.5 Canada

5.6 Mexico

5.7 Brazil

6 APAC

6.1 APAC Air-to-Liquid Coolant Distribution Unit (CDU) Sales by Region

6.1.1 APAC Air-to-Liquid Coolant Distribution Unit (CDU) Sales by Region (2021-2026)

6.1.2 APAC Air-to-Liquid Coolant Distribution Unit (CDU) Revenue by Region
(2021-2026)

6.2 APAC Air-to-Liquid Coolant Distribution Unit (CDU) Sales by Cooling Capacity
(2021-2026)

6.3 APAC Air-to-Liquid Coolant Distribution Unit (CDU) Sales by Application
(2021-2026)

6.4 China

6.5 Japan

6.6 South Korea

6.7 Southeast Asia

6.8 India

6.9 Australia

6.10 China Taiwan

7 EUROPE

7.1 Europe Air-to-Liquid Coolant Distribution Unit (CDU) by Country

7.1.1 Europe Air-to-Liquid Coolant Distribution Unit (CDU) Sales by Country
(2021-2026)

7.1.2 Europe Air-to-Liquid Coolant Distribution Unit (CDU) Revenue by Country
(2021-2026)

7.2 Europe Air-to-Liquid Coolant Distribution Unit (CDU) Sales by Cooling Capacity
(2021-2026)

7.3 Europe Air-to-Liquid Coolant Distribution Unit (CDU) Sales by Application

(2021-2026)

7.4 Germany

7.5 France

7.6 UK

7.7 Italy

7.8 Russia

8 MIDDLE EAST & AFRICA

8.1 Middle East & Africa Air-to-Liquid Coolant Distribution Unit (CDU) by Country

8.1.1 Middle East & Africa Air-to-Liquid Coolant Distribution Unit (CDU) Sales by Country (2021-2026)

8.1.2 Middle East & Africa Air-to-Liquid Coolant Distribution Unit (CDU) Revenue by Country (2021-2026)

8.2 Middle East & Africa Air-to-Liquid Coolant Distribution Unit (CDU) Sales by Cooling Capacity (2021-2026)

8.3 Middle East & Africa Air-to-Liquid Coolant Distribution Unit (CDU) Sales by Application (2021-2026)

8.4 Egypt

8.5 South Africa

8.6 Israel

8.7 Turkey

8.8 GCC Countries

9 MARKET DRIVERS, CHALLENGES AND TRENDS

9.1 Market Drivers & Growth Opportunities

9.2 Market Challenges & Risks

9.3 Industry Trends

10 MANUFACTURING COST STRUCTURE ANALYSIS

10.1 Raw Material and Suppliers

10.2 Manufacturing Cost Structure Analysis of Air-to-Liquid Coolant Distribution Unit (CDU)

10.3 Manufacturing Process Analysis of Air-to-Liquid Coolant Distribution Unit (CDU)

10.4 Industry Chain Structure of Air-to-Liquid Coolant Distribution Unit (CDU)

11 MARKETING, DISTRIBUTORS AND CUSTOMER

11.1 Sales Channel

11.1.1 Direct Channels

11.1.2 Indirect Channels

11.2 Air-to-Liquid Coolant Distribution Unit (CDU) Distributors

11.3 Air-to-Liquid Coolant Distribution Unit (CDU) Customer

12 WORLD FORECAST REVIEW FOR AIR-TO-LIQUID COOLANT DISTRIBUTION UNIT (CDU) BY GEOGRAPHIC REGION

12.1 Global Air-to-Liquid Coolant Distribution Unit (CDU) Market Size Forecast by Region

12.1.1 Global Air-to-Liquid Coolant Distribution Unit (CDU) Forecast by Region (2027-2032)

12.1.2 Global Air-to-Liquid Coolant Distribution Unit (CDU) Annual Revenue Forecast by Region (2027-2032)

12.2 Americas Forecast by Country (2027-2032)

12.3 APAC Forecast by Region (2027-2032)

12.4 Europe Forecast by Country (2027-2032)

12.5 Middle East & Africa Forecast by Country (2027-2032)

12.6 Global Air-to-Liquid Coolant Distribution Unit (CDU) Forecast by Cooling Capacity (2027-2032)

12.7 Global Air-to-Liquid Coolant Distribution Unit (CDU) Forecast by Application (2027-2032)

13 KEY PLAYERS ANALYSIS

13.1 Vertiv Holdings Co., Ltd.

13.1.1 Vertiv Holdings Co., Ltd. Company Information

13.1.2 Vertiv Holdings Co., Ltd. Air-to-Liquid Coolant Distribution Unit (CDU) Product Portfolios and Specifications

13.1.3 Vertiv Holdings Co., Ltd. Air-to-Liquid Coolant Distribution Unit (CDU) Sales, Revenue, Price and Gross Margin (2021-2026)

13.1.4 Vertiv Holdings Co., Ltd. Main Business Overview

13.1.5 Vertiv Holdings Co., Ltd. Latest Developments

13.2 Schneider Electric SE

13.2.1 Schneider Electric SE Company Information

13.2.2 Schneider Electric SE Air-to-Liquid Coolant Distribution Unit (CDU) Product Portfolios and Specifications

13.2.3 Schneider Electric SE Air-to-Liquid Coolant Distribution Unit (CDU) Sales, Revenue, Price and Gross Margin (2021-2026)

13.2.4 Schneider Electric SE Main Business Overview

13.2.5 Schneider Electric SE Latest Developments

13.3 nVent Thermal / nVent RAYCHEM

13.3.1 nVent Thermal / nVent RAYCHEM Company Information

13.3.2 nVent Thermal / nVent RAYCHEM Air-to-Liquid Coolant Distribution Unit (CDU) Product Portfolios and Specifications

13.3.3 nVent Thermal / nVent RAYCHEM Air-to-Liquid Coolant Distribution Unit (CDU) Sales, Revenue, Price and Gross Margin (2021-2026)

13.3.4 nVent Thermal / nVent RAYCHEM Main Business Overview

13.3.5 nVent Thermal / nVent RAYCHEM Latest Developments

13.4 CoolIT Systems Inc.

13.4.1 CoolIT Systems Inc. Company Information

13.4.2 CoolIT Systems Inc. Air-to-Liquid Coolant Distribution Unit (CDU) Product Portfolios and Specifications

13.4.3 CoolIT Systems Inc. Air-to-Liquid Coolant Distribution Unit (CDU) Sales, Revenue, Price and Gross Margin (2021-2026)

13.4.4 CoolIT Systems Inc. Main Business Overview

13.4.5 CoolIT Systems Inc. Latest Developments

13.5 Boyd Corporation

13.5.1 Boyd Corporation Company Information

13.5.2 Boyd Corporation Air-to-Liquid Coolant Distribution Unit (CDU) Product Portfolios and Specifications

13.5.3 Boyd Corporation Air-to-Liquid Coolant Distribution Unit (CDU) Sales, Revenue, Price and Gross Margin (2021-2026)

13.5.4 Boyd Corporation Main Business Overview

13.5.5 Boyd Corporation Latest Developments

13.6 Rittal GmbH & Co. KG

13.6.1 Rittal GmbH & Co. KG Company Information

13.6.2 Rittal GmbH & Co. KG Air-to-Liquid Coolant Distribution Unit (CDU) Product Portfolios and Specifications

13.6.3 Rittal GmbH & Co. KG Air-to-Liquid Coolant Distribution Unit (CDU) Sales, Revenue, Price and Gross Margin (2021-2026)

13.6.4 Rittal GmbH & Co. KG Main Business Overview

13.6.5 Rittal GmbH & Co. KG Latest Developments

13.7 Stulz GmbH

13.7.1 Stulz GmbH Company Information

13.7.2 Stulz GmbH Air-to-Liquid Coolant Distribution Unit (CDU) Product Portfolios and

Specifications

13.7.3 Stulz GmbH Air-to-Liquid Coolant Distribution Unit (CDU) Sales, Revenue, Price and Gross Margin (2021-2026)

13.7.4 Stulz GmbH Main Business Overview

13.7.5 Stulz GmbH Latest Developments

13.8 DCX Liquid Cooling Systems

13.8.1 DCX Liquid Cooling Systems Company Information

13.8.2 DCX Liquid Cooling Systems Air-to-Liquid Coolant Distribution Unit (CDU)

Product Portfolios and Specifications

13.8.3 DCX Liquid Cooling Systems Air-to-Liquid Coolant Distribution Unit (CDU) Sales, Revenue, Price and Gross Margin (2021-2026)

13.8.4 DCX Liquid Cooling Systems Main Business Overview

13.8.5 DCX Liquid Cooling Systems Latest Developments

13.9 Submer Technologies S.L.

13.9.1 Submer Technologies S.L. Company Information

13.9.2 Submer Technologies S.L. Air-to-Liquid Coolant Distribution Unit (CDU) Product Portfolios and Specifications

13.9.3 Submer Technologies S.L. Air-to-Liquid Coolant Distribution Unit (CDU) Sales, Revenue, Price and Gross Margin (2021-2026)

13.9.4 Submer Technologies S.L. Main Business Overview

13.9.5 Submer Technologies S.L. Latest Developments

13.10 Asetek A/S

13.10.1 Asetek A/S Company Information

13.10.2 Asetek A/S Air-to-Liquid Coolant Distribution Unit (CDU) Product Portfolios and Specifications

13.10.3 Asetek A/S Air-to-Liquid Coolant Distribution Unit (CDU) Sales, Revenue, Price and Gross Margin (2021-2026)

13.10.4 Asetek A/S Main Business Overview

13.10.5 Asetek A/S Latest Developments

13.11 Chilldyne, Inc.

13.11.1 Chilldyne, Inc. Company Information

13.11.2 Chilldyne, Inc. Air-to-Liquid Coolant Distribution Unit (CDU) Product Portfolios and Specifications

13.11.3 Chilldyne, Inc. Air-to-Liquid Coolant Distribution Unit (CDU) Sales, Revenue, Price and Gross Margin (2021-2026)

13.11.4 Chilldyne, Inc. Main Business Overview

13.11.5 Chilldyne, Inc. Latest Developments

13.12 Delta Electronics, Inc.

13.12.1 Delta Electronics, Inc. Company Information

13.12.2 Delta Electronics, Inc. Air-to-Liquid Coolant Distribution Unit (CDU) Product Portfolios and Specifications

13.12.3 Delta Electronics, Inc. Air-to-Liquid Coolant Distribution Unit (CDU) Sales, Revenue, Price and Gross Margin (2021-2026)

13.12.4 Delta Electronics, Inc. Main Business Overview

13.12.5 Delta Electronics, Inc. Latest Developments

13.13 Motivair Corporation

13.13.1 Motivair Corporation Company Information

13.13.2 Motivair Corporation Air-to-Liquid Coolant Distribution Unit (CDU) Product Portfolios and Specifications

13.13.3 Motivair Corporation Air-to-Liquid Coolant Distribution Unit (CDU) Sales, Revenue, Price and Gross Margin (2021-2026)

13.13.4 Motivair Corporation Main Business Overview

13.13.5 Motivair Corporation Latest Developments

13.14 Coolcentric

13.14.1 Coolcentric Company Information

13.14.2 Coolcentric Air-to-Liquid Coolant Distribution Unit (CDU) Product Portfolios and Specifications

13.14.3 Coolcentric Air-to-Liquid Coolant Distribution Unit (CDU) Sales, Revenue, Price and Gross Margin (2021-2026)

13.14.4 Coolcentric Main Business Overview

13.14.5 Coolcentric Latest Developments

13.15 Nidec Corporation

13.15.1 Nidec Corporation Company Information

13.15.2 Nidec Corporation Air-to-Liquid Coolant Distribution Unit (CDU) Product Portfolios and Specifications

13.15.3 Nidec Corporation Air-to-Liquid Coolant Distribution Unit (CDU) Sales, Revenue, Price and Gross Margin (2021-2026)

13.15.4 Nidec Corporation Main Business Overview

13.15.5 Nidec Corporation Latest Developments

13.16 Airedale International Air Conditioning Ltd

13.16.1 Airedale International Air Conditioning Ltd Company Information

13.16.2 Airedale International Air Conditioning Ltd Air-to-Liquid Coolant Distribution Unit (CDU) Product Portfolios and Specifications

13.16.3 Airedale International Air Conditioning Ltd Air-to-Liquid Coolant Distribution Unit (CDU) Sales, Revenue, Price and Gross Margin (2021-2026)

13.16.4 Airedale International Air Conditioning Ltd Main Business Overview

13.16.5 Airedale International Air Conditioning Ltd Latest Developments

13.17 Midas Green Technologies

- 13.17.1 Midas Green Technologies Company Information
- 13.17.2 Midas Green Technologies Air-to-Liquid Coolant Distribution Unit (CDU) Product Portfolios and Specifications
- 13.17.3 Midas Green Technologies Air-to-Liquid Coolant Distribution Unit (CDU) Sales, Revenue, Price and Gross Margin (2021-2026)
- 13.17.4 Midas Green Technologies Main Business Overview
- 13.17.5 Midas Green Technologies Latest Developments
- 13.18 Johnson Controls Intl
 - 13.18.1 Johnson Controls Intl Company Information
 - 13.18.2 Johnson Controls Intl Air-to-Liquid Coolant Distribution Unit (CDU) Product Portfolios and Specifications
 - 13.18.3 Johnson Controls Intl Air-to-Liquid Coolant Distribution Unit (CDU) Sales, Revenue, Price and Gross Margin (2021-2026)
 - 13.18.4 Johnson Controls Intl Main Business Overview
 - 13.18.5 Johnson Controls Intl Latest Developments
- 13.19 Daikin Applied
 - 13.19.1 Daikin Applied Company Information
 - 13.19.2 Daikin Applied Air-to-Liquid Coolant Distribution Unit (CDU) Product Portfolios and Specifications
 - 13.19.3 Daikin Applied Air-to-Liquid Coolant Distribution Unit (CDU) Sales, Revenue, Price and Gross Margin (2021-2026)
 - 13.19.4 Daikin Applied Main Business Overview
 - 13.19.5 Daikin Applied Latest Developments
- 13.20 Trane Technologies
 - 13.20.1 Trane Technologies Company Information
 - 13.20.2 Trane Technologies Air-to-Liquid Coolant Distribution Unit (CDU) Product Portfolios and Specifications
 - 13.20.3 Trane Technologies Air-to-Liquid Coolant Distribution Unit (CDU) Sales, Revenue, Price and Gross Margin (2021-2026)
 - 13.20.4 Trane Technologies Main Business Overview
 - 13.20.5 Trane Technologies Latest Developments

14 RESEARCH FINDINGS AND CONCLUSION

List Of Tables

LIST OF TABLES

- Table 1. Air-to-Liquid Coolant Distribution Unit (CDU) Annual Sales CAGR by Geographic Region (2021, 2025 & 2032) & (\$ millions)
- Table 2. Air-to-Liquid Coolant Distribution Unit (CDU) Annual Sales CAGR by Country/Region (2021, 2025 & 2032) & (\$ millions)
- Table 3. Major Players of Low-capacity CDU (<50 kW)
- Table 4. Major Players of Medium-capacity CDU (50-200 kW)
- Table 5. Major Players of High-capacity CDU (>200 kW)
- Table 6. Global Air-to-Liquid Coolant Distribution Unit (CDU) Sales by Cooling Capacity (2021-2026) & (K Units)
- Table 7. Global Air-to-Liquid Coolant Distribution Unit (CDU) Sales Market Share by Cooling Capacity (2021-2026)
- Table 8. Global Air-to-Liquid Coolant Distribution Unit (CDU) Revenue by Cooling Capacity (2021-2026) & (\$ million)
- Table 9. Global Air-to-Liquid Coolant Distribution Unit (CDU) Revenue Market Share by Cooling Capacity (2021-2026)
- Table 10. Global Air-to-Liquid Coolant Distribution Unit (CDU) Sale Price by Cooling Capacity (2021-2026) & (K US\$/Unit)
- Table 11. Major Players of Rack-mounted Air-to-Liquid CDU
- Table 12. Major Players of In-row Air-to-Liquid CDU
- Table 13. Major Players of Room-level Air-to-Liquid CDU
- Table 14. Global Air-to-Liquid Coolant Distribution Unit (CDU) Sales by Installation Type (2021-2026) & (K Units)
- Table 15. Global Air-to-Liquid Coolant Distribution Unit (CDU) Sales Market Share by Installation Type (2021-2026)
- Table 16. Global Air-to-Liquid Coolant Distribution Unit (CDU) Revenue by Installation Type (2021-2026) & (\$ million)
- Table 17. Global Air-to-Liquid Coolant Distribution Unit (CDU) Revenue Market Share by Installation Type (2021-2026)
- Table 18. Global Air-to-Liquid Coolant Distribution Unit (CDU) Sale Price by Installation Type (2021-2026) & (K US\$/Unit)
- Table 19. Major Players of Standalone Closed-loop Air-to-Liquid CDU
- Table 20. Major Players of Facility-coupled Air-to-Liquid CDU
- Table 21. Global Air-to-Liquid Coolant Distribution Unit (CDU) Sales by System Architecture (2021-2026) & (K Units)
- Table 22. Global Air-to-Liquid Coolant Distribution Unit (CDU) Sales Market Share by

System Architecture (2021-2026)

Table 23. Global Air-to-Liquid Coolant Distribution Unit (CDU) Revenue by System Architecture (2021-2026) & (\$ million)

Table 24. Global Air-to-Liquid Coolant Distribution Unit (CDU) Revenue Market Share by System Architecture (2021-2026)

Table 25. Global Air-to-Liquid Coolant Distribution Unit (CDU) Sale Price by System Architecture (2021-2026) & (K US\$/Unit)

Table 26. Global Air-to-Liquid Coolant Distribution Unit (CDU) Sale by Application (2021-2026) & (K Units)

Table 27. Global Air-to-Liquid Coolant Distribution Unit (CDU) Sale Market Share by Application (2021-2026)

Table 28. Global Air-to-Liquid Coolant Distribution Unit (CDU) Revenue by Application (2021-2026) & (\$ million)

Table 29. Global Air-to-Liquid Coolant Distribution Unit (CDU) Revenue Market Share by Application (2021-2026)

Table 30. Global Air-to-Liquid Coolant Distribution Unit (CDU) Sale Price by Application (2021-2026) & (K US\$/Unit)

Table 31. Global Air-to-Liquid Coolant Distribution Unit (CDU) Sales by Company (2021-2026) & (K Units)

Table 32. Global Air-to-Liquid Coolant Distribution Unit (CDU) Sales Market Share by Company (2021-2026)

Table 33. Global Air-to-Liquid Coolant Distribution Unit (CDU) Revenue by Company (2021-2026) & (\$ millions)

Table 34. Global Air-to-Liquid Coolant Distribution Unit (CDU) Revenue Market Share by Company (2021-2026)

Table 35. Global Air-to-Liquid Coolant Distribution Unit (CDU) Sale Price by Company (2021-2026) & (K US\$/Unit)

Table 36. Key Manufacturers Air-to-Liquid Coolant Distribution Unit (CDU) Producing Area Distribution and Sales Area

Table 37. Players Air-to-Liquid Coolant Distribution Unit (CDU) Products Offered

Table 38. Air-to-Liquid Coolant Distribution Unit (CDU) Concentration Ratio (CR3, CR5 and CR10) & (2024-2026)

Table 39. New Products and Potential Entrants

Table 40. Market M&A Activity & Strategy

Table 41. Global Air-to-Liquid Coolant Distribution Unit (CDU) Sales by Geographic Region (2021-2026) & (K Units)

Table 42. Global Air-to-Liquid Coolant Distribution Unit (CDU) Sales Market Share Geographic Region (2021-2026)

Table 43. Global Air-to-Liquid Coolant Distribution Unit (CDU) Revenue by Geographic

Region (2021-2026) & (\$ millions)

Table 44. Global Air-to-Liquid Coolant Distribution Unit (CDU) Revenue Market Share by Geographic Region (2021-2026)

Table 45. Global Air-to-Liquid Coolant Distribution Unit (CDU) Sales by Country/Region (2021-2026) & (K Units)

Table 46. Global Air-to-Liquid Coolant Distribution Unit (CDU) Sales Market Share by Country/Region (2021-2026)

Table 47. Global Air-to-Liquid Coolant Distribution Unit (CDU) Revenue by Country/Region (2021-2026) & (\$ millions)

Table 48. Global Air-to-Liquid Coolant Distribution Unit (CDU) Revenue Market Share by Country/Region (2021-2026)

Table 49. Americas Air-to-Liquid Coolant Distribution Unit (CDU) Sales by Country (2021-2026) & (K Units)

Table 50. Americas Air-to-Liquid Coolant Distribution Unit (CDU) Sales Market Share by Country (2021-2026)

Table 51. Americas Air-to-Liquid Coolant Distribution Unit (CDU) Revenue by Country (2021-2026) & (\$ millions)

Table 52. Americas Air-to-Liquid Coolant Distribution Unit (CDU) Sales by Cooling Capacity (2021-2026) & (K Units)

Table 53. Americas Air-to-Liquid Coolant Distribution Unit (CDU) Sales by Application (2021-2026) & (K Units)

Table 54. APAC Air-to-Liquid Coolant Distribution Unit (CDU) Sales by Region (2021-2026) & (K Units)

Table 55. APAC Air-to-Liquid Coolant Distribution Unit (CDU) Sales Market Share by Region (2021-2026)

Table 56. APAC Air-to-Liquid Coolant Distribution Unit (CDU) Revenue by Region (2021-2026) & (\$ millions)

Table 57. APAC Air-to-Liquid Coolant Distribution Unit (CDU) Sales by Cooling Capacity (2021-2026) & (K Units)

Table 58. APAC Air-to-Liquid Coolant Distribution Unit (CDU) Sales by Application (2021-2026) & (K Units)

Table 59. Europe Air-to-Liquid Coolant Distribution Unit (CDU) Sales by Country (2021-2026) & (K Units)

Table 60. Europe Air-to-Liquid Coolant Distribution Unit (CDU) Revenue by Country (2021-2026) & (\$ millions)

Table 61. Europe Air-to-Liquid Coolant Distribution Unit (CDU) Sales by Cooling Capacity (2021-2026) & (K Units)

Table 62. Europe Air-to-Liquid Coolant Distribution Unit (CDU) Sales by Application (2021-2026) & (K Units)

- Table 63. Middle East & Africa Air-to-Liquid Coolant Distribution Unit (CDU) Sales by Country (2021-2026) & (K Units)
- Table 64. Middle East & Africa Air-to-Liquid Coolant Distribution Unit (CDU) Revenue Market Share by Country (2021-2026)
- Table 65. Middle East & Africa Air-to-Liquid Coolant Distribution Unit (CDU) Sales by Cooling Capacity (2021-2026) & (K Units)
- Table 66. Middle East & Africa Air-to-Liquid Coolant Distribution Unit (CDU) Sales by Application (2021-2026) & (K Units)
- Table 67. Key Market Drivers & Growth Opportunities of Air-to-Liquid Coolant Distribution Unit (CDU)
- Table 68. Key Market Challenges & Risks of Air-to-Liquid Coolant Distribution Unit (CDU)
- Table 69. Key Industry Trends of Air-to-Liquid Coolant Distribution Unit (CDU)
- Table 70. Air-to-Liquid Coolant Distribution Unit (CDU) Raw Material
- Table 71. Key Suppliers of Raw Materials
- Table 72. Air-to-Liquid Coolant Distribution Unit (CDU) Distributors List
- Table 73. Air-to-Liquid Coolant Distribution Unit (CDU) Customer List
- Table 74. Global Air-to-Liquid Coolant Distribution Unit (CDU) Sales Forecast by Region (2027-2032) & (K Units)
- Table 75. Global Air-to-Liquid Coolant Distribution Unit (CDU) Revenue Forecast by Region (2027-2032) & (\$ millions)
- Table 76. Americas Air-to-Liquid Coolant Distribution Unit (CDU) Sales Forecast by Country (2027-2032) & (K Units)
- Table 77. Americas Air-to-Liquid Coolant Distribution Unit (CDU) Annual Revenue Forecast by Country (2027-2032) & (\$ millions)
- Table 78. APAC Air-to-Liquid Coolant Distribution Unit (CDU) Sales Forecast by Region (2027-2032) & (K Units)
- Table 79. APAC Air-to-Liquid Coolant Distribution Unit (CDU) Annual Revenue Forecast by Region (2027-2032) & (\$ millions)
- Table 80. Europe Air-to-Liquid Coolant Distribution Unit (CDU) Sales Forecast by Country (2027-2032) & (K Units)
- Table 81. Europe Air-to-Liquid Coolant Distribution Unit (CDU) Revenue Forecast by Country (2027-2032) & (\$ millions)
- Table 82. Middle East & Africa Air-to-Liquid Coolant Distribution Unit (CDU) Sales Forecast by Country (2027-2032) & (K Units)
- Table 83. Middle East & Africa Air-to-Liquid Coolant Distribution Unit (CDU) Revenue Forecast by Country (2027-2032) & (\$ millions)
- Table 84. Global Air-to-Liquid Coolant Distribution Unit (CDU) Sales Forecast by Cooling Capacity (2027-2032) & (K Units)

Table 85. Global Air-to-Liquid Coolant Distribution Unit (CDU) Revenue Forecast by Cooling Capacity (2027-2032) & (\$ millions)

Table 86. Global Air-to-Liquid Coolant Distribution Unit (CDU) Sales Forecast by Application (2027-2032) & (K Units)

Table 87. Global Air-to-Liquid Coolant Distribution Unit (CDU) Revenue Forecast by Application (2027-2032) & (\$ millions)

Table 88. Vertiv Holdings Co., Ltd. Basic Information, Air-to-Liquid Coolant Distribution Unit (CDU) Manufacturing Base, Sales Area and Its Competitors

Table 89. Vertiv Holdings Co., Ltd. Air-to-Liquid Coolant Distribution Unit (CDU) Product Portfolios and Specifications

Table 90. Vertiv Holdings Co., Ltd. Air-to-Liquid Coolant Distribution Unit (CDU) Sales (K Units), Revenue (\$ Million), Price (K US\$/Unit) and Gross Margin (2021-2026)

Table 91. Vertiv Holdings Co., Ltd. Main Business

Table 92. Vertiv Holdings Co., Ltd. Latest Developments

Table 93. Schneider Electric SE Basic Information, Air-to-Liquid Coolant Distribution Unit (CDU) Manufacturing Base, Sales Area and Its Competitors

Table 94. Schneider Electric SE Air-to-Liquid Coolant Distribution Unit (CDU) Product Portfolios and Specifications

Table 95. Schneider Electric SE Air-to-Liquid Coolant Distribution Unit (CDU) Sales (K Units), Revenue (\$ Million), Price (K US\$/Unit) and Gross Margin (2021-2026)

Table 96. Schneider Electric SE Main Business

Table 97. Schneider Electric SE Latest Developments

Table 98. nVent Thermal / nVent RAYCHEM Basic Information, Air-to-Liquid Coolant Distribution Unit (CDU) Manufacturing Base, Sales Area and Its Competitors

Table 99. nVent Thermal / nVent RAYCHEM Air-to-Liquid Coolant Distribution Unit (CDU) Product Portfolios and Specifications

Table 100. nVent Thermal / nVent RAYCHEM Air-to-Liquid Coolant Distribution Unit (CDU) Sales (K Units), Revenue (\$ Million), Price (K US\$/Unit) and Gross Margin (2021-2026)

Table 101. nVent Thermal / nVent RAYCHEM Main Business

Table 102. nVent Thermal / nVent RAYCHEM Latest Developments

Table 103. CoolIT Systems Inc. Basic Information, Air-to-Liquid Coolant Distribution Unit (CDU) Manufacturing Base, Sales Area and Its Competitors

Table 104. CoolIT Systems Inc. Air-to-Liquid Coolant Distribution Unit (CDU) Product Portfolios and Specifications

Table 105. CoolIT Systems Inc. Air-to-Liquid Coolant Distribution Unit (CDU) Sales (K Units), Revenue (\$ Million), Price (K US\$/Unit) and Gross Margin (2021-2026)

Table 106. CoolIT Systems Inc. Main Business

Table 107. CoolIT Systems Inc. Latest Developments

Table 108. Boyd Corporation Basic Information, Air-to-Liquid Coolant Distribution Unit (CDU) Manufacturing Base, Sales Area and Its Competitors

Table 109. Boyd Corporation Air-to-Liquid Coolant Distribution Unit (CDU) Product Portfolios and Specifications

Table 110. Boyd Corporation Air-to-Liquid Coolant Distribution Unit (CDU) Sales (K Units), Revenue (\$ Million), Price (K US\$/Unit) and Gross Margin (2021-2026)

Table 111. Boyd Corporation Main Business

Table 112. Boyd Corporation Latest Developments

Table 113. Rittal GmbH & Co. KG Basic Information, Air-to-Liquid Coolant Distribution Unit (CDU) Manufacturing Base, Sales Area and Its Competitors

Table 114. Rittal GmbH & Co. KG Air-to-Liquid Coolant Distribution Unit (CDU) Product Portfolios and Specifications

Table 115. Rittal GmbH & Co. KG Air-to-Liquid Coolant Distribution Unit (CDU) Sales (K Units), Revenue (\$ Million), Price (K US\$/Unit) and Gross Margin (2021-2026)

Table 116. Rittal GmbH & Co. KG Main Business

Table 117. Rittal GmbH & Co. KG Latest Developments

Table 118. Stulz GmbH Basic Information, Air-to-Liquid Coolant Distribution Unit (CDU) Manufacturing Base, Sales Area and Its Competitors

Table 119. Stulz GmbH Air-to-Liquid Coolant Distribution Unit (CDU) Product Portfolios and Specifications

Table 120. Stulz GmbH Air-to-Liquid Coolant Distribution Unit (CDU) Sales (K Units), Revenue (\$ Million), Price (K US\$/Unit) and Gross Margin (2021-2026)

Table 121. Stulz GmbH Main Business

Table 122. Stulz GmbH Latest Developments

Table 123. DCX Liquid Cooling Systems Basic Information, Air-to-Liquid Coolant Distribution Unit (CDU) Manufacturing Base, Sales Area and Its Competitors

Table 124. DCX Liquid Cooling Systems Air-to-Liquid Coolant Distribution Unit (CDU) Product Portfolios and Specifications

Table 125. DCX Liquid Cooling Systems Air-to-Liquid Coolant Distribution Unit (CDU) Sales (K Units), Revenue (\$ Million), Price (K US\$/Unit) and Gross Margin (2021-2026)

Table 126. DCX Liquid Cooling Systems Main Business

Table 127. DCX Liquid Cooling Systems Latest Developments

Table 128. Submer Technologies S.L. Basic Information, Air-to-Liquid Coolant Distribution Unit (CDU) Manufacturing Base, Sales Area and Its Competitors

Table 129. Submer Technologies S.L. Air-to-Liquid Coolant Distribution Unit (CDU) Product Portfolios and Specifications

Table 130. Submer Technologies S.L. Air-to-Liquid Coolant Distribution Unit (CDU) Sales (K Units), Revenue (\$ Million), Price (K US\$/Unit) and Gross Margin (2021-2026)

Table 131. Submer Technologies S.L. Main Business

Table 132. Submer Technologies S.L. Latest Developments

Table 133. Asetek A/S Basic Information, Air-to-Liquid Coolant Distribution Unit (CDU) Manufacturing Base, Sales Area and Its Competitors

Table 134. Asetek A/S Air-to-Liquid Coolant Distribution Unit (CDU) Product Portfolios and Specifications

Table 135. Asetek A/S Air-to-Liquid Coolant Distribution Unit (CDU) Sales (K Units), Revenue (\$ Million), Price (K US\$/Unit) and Gross Margin (2021-2026)

Table 136. Asetek A/S Main Business

Table 137. Asetek A/S Latest Developments

Table 138. Chilldyne, Inc. Basic Information, Air-to-Liquid Coolant Distribution Unit (CDU) Manufacturing Base, Sales Area and Its Competitors

Table 139. Chilldyne, Inc. Air-to-Liquid Coolant Distribution Unit (CDU) Product Portfolios and Specifications

Table 140. Chilldyne, Inc. Air-to-Liquid Coolant Distribution Unit (CDU) Sales (K Units), Revenue (\$ Million), Price (K US\$/Unit) and Gross Margin (2021-2026)

Table 141. Chilldyne, Inc. Main Business

Table 142. Chilldyne, Inc. Latest Developments

Table 143. Delta Electronics, Inc. Basic Information, Air-to-Liquid Coolant Distribution Unit (CDU) Manufacturing Base, Sales Area and Its Competitors

Table 144. Delta Electronics, Inc. Air-to-Liquid Coolant Distribution Unit (CDU) Product Portfolios and Specifications

Table 145. Delta Electronics, Inc. Air-to-Liquid Coolant Distribution Unit (CDU) Sales (K Units), Revenue (\$ Million), Price (K US\$/Unit) and Gross Margin (2021-2026)

Table 146. Delta Electronics, Inc. Main Business

Table 147. Delta Electronics, Inc. Latest Developments

Table 148. Motivair Corporation Basic Information, Air-to-Liquid Coolant Distribution Unit (CDU) Manufacturing Base, Sales Area and Its Competitors

Table 149. Motivair Corporation Air-to-Liquid Coolant Distribution Unit (CDU) Product Portfolios and Specifications

Table 150. Motivair Corporation Air-to-Liquid Coolant Distribution Unit (CDU) Sales (K Units), Revenue (\$ Million), Price (K US\$/Unit) and Gross Margin (2021-2026)

Table 151. Motivair Corporation Main Business

Table 152. Motivair Corporation Latest Developments

Table 153. Coolcentric Basic Information, Air-to-Liquid Coolant Distribution Unit (CDU) Manufacturing Base, Sales Area and Its Competitors

Table 154. Coolcentric Air-to-Liquid Coolant Distribution Unit (CDU) Product Portfolios and Specifications

Table 155. Coolcentric Air-to-Liquid Coolant Distribution Unit (CDU) Sales (K Units), Revenue (\$ Million), Price (K US\$/Unit) and Gross Margin (2021-2026)

Table 156. Coolcentric Main Business

Table 157. Coolcentric Latest Developments

Table 158. Nidec Corporation Basic Information, Air-to-Liquid Coolant Distribution Unit (CDU) Manufacturing Base, Sales Area and Its Competitors

Table 159. Nidec Corporation Air-to-Liquid Coolant Distribution Unit (CDU) Product Portfolios and Specifications

Table 160. Nidec Corporation Air-to-Liquid Coolant Distribution Unit (CDU) Sales (K Units), Revenue (\$ Million), Price (K US\$/Unit) and Gross Margin (2021-2026)

Table 161. Nidec Corporation Main Business

Table 162. Nidec Corporation Latest Developments

Table 163. Airedale International Air Conditioning Ltd Basic Information, Air-to-Liquid Coolant Distribution Unit (CDU) Manufacturing Base, Sales Area and Its Competitors

Table 164. Airedale International Air Conditioning Ltd Air-to-Liquid Coolant Distribution Unit (CDU) Product Portfolios and Specifications

Table 165. Airedale International Air Conditioning Ltd Air-to-Liquid Coolant Distribution Unit (CDU) Sales (K Units), Revenue (\$ Million), Price (K US\$/Unit) and Gross Margin (2021-2026)

Table 166. Airedale International Air Conditioning Ltd Main Business

Table 167. Airedale International Air Conditioning Ltd Latest Developments

Table 168. Midas Green Technologies Basic Information, Air-to-Liquid Coolant Distribution Unit (CDU) Manufacturing Base, Sales Area and Its Competitors

Table 169. Midas Green Technologies Air-to-Liquid Coolant Distribution Unit (CDU) Product Portfolios and Specifications

Table 170. Midas Green Technologies Air-to-Liquid Coolant Distribution Unit (CDU) Sales (K Units), Revenue (\$ Million), Price (K US\$/Unit) and Gross Margin (2021-2026)

Table 171. Midas Green Technologies Main Business

Table 172. Midas Green Technologies Latest Developments

Table 173. Johnson Controls Intl Basic Information, Air-to-Liquid Coolant Distribution Unit (CDU) Manufacturing Base, Sales Area and Its Competitors

Table 174. Johnson Controls Intl Air-to-Liquid Coolant Distribution Unit (CDU) Product Portfolios and Specifications

Table 175. Johnson Controls Intl Air-to-Liquid Coolant Distribution Unit (CDU) Sales (K Units), Revenue (\$ Million), Price (K US\$/Unit) and Gross Margin (2021-2026)

Table 176. Johnson Controls Intl Main Business

Table 177. Johnson Controls Intl Latest Developments

Table 178. Daikin Applied Basic Information, Air-to-Liquid Coolant Distribution Unit (CDU) Manufacturing Base, Sales Area and Its Competitors

Table 179. Daikin Applied Air-to-Liquid Coolant Distribution Unit (CDU) Product Portfolios and Specifications

Table 180. Daikin Applied Air-to-Liquid Coolant Distribution Unit (CDU) Sales (K Units), Revenue (\$ Million), Price (K US\$/Unit) and Gross Margin (2021-2026)

Table 181. Daikin Applied Main Business

Table 182. Daikin Applied Latest Developments

Table 183. Trane Technologies Basic Information, Air-to-Liquid Coolant Distribution Unit (CDU) Manufacturing Base, Sales Area and Its Competitors

Table 184. Trane Technologies Air-to-Liquid Coolant Distribution Unit (CDU) Product Portfolios and Specifications

Table 185. Trane Technologies Air-to-Liquid Coolant Distribution Unit (CDU) Sales (K Units), Revenue (\$ Million), Price (K US\$/Unit) and Gross Margin (2021-2026)

Table 186. Trane Technologies Main Business

Table 187. Trane Technologies Latest Developments

List Of Figures

LIST OF FIGURES

- Figure 1. Picture of Air-to-Liquid Coolant Distribution Unit (CDU)
- Figure 2. Air-to-Liquid Coolant Distribution Unit (CDU) Report Years Considered
- Figure 3. Research Objectives
- Figure 4. Research Methodology
- Figure 5. Research Process and Data Source
- Figure 6. Global Air-to-Liquid Coolant Distribution Unit (CDU) Sales Growth Rate 2021-2032 (K Units)
- Figure 7. Global Air-to-Liquid Coolant Distribution Unit (CDU) Revenue Growth Rate 2021-2032 (\$ millions)
- Figure 8. Air-to-Liquid Coolant Distribution Unit (CDU) Sales by Geographic Region (2021, 2025 & 2032) & (\$ millions)
- Figure 9. Air-to-Liquid Coolant Distribution Unit (CDU) Sales Market Share by Country/Region (2025)
- Figure 10. Air-to-Liquid Coolant Distribution Unit (CDU) Sales Market Share by Country/Region (2021, 2025 & 2032)
- Figure 11. Product Picture of Low-capacity CDU (?50 kW)
- Figure 12. Product Picture of Medium-capacity CDU (50?200 kW)
- Figure 13. Product Picture of High-capacity CDU (?200 kW)
- Figure 14. Global Air-to-Liquid Coolant Distribution Unit (CDU) Sales Market Share by Cooling Capacity in 2026
- Figure 15. Global Air-to-Liquid Coolant Distribution Unit (CDU) Revenue Market Share by Cooling Capacity (2021-2026)
- Figure 16. Product Picture of Rack-mounted Air-to-Liquid CDU
- Figure 17. Product Picture of In-row Air-to-Liquid CDU
- Figure 18. Product Picture of Room-level Air-to-Liquid CDU
- Figure 19. Global Air-to-Liquid Coolant Distribution Unit (CDU) Sales Market Share by Installation Type in 2026
- Figure 20. Global Air-to-Liquid Coolant Distribution Unit (CDU) Revenue Market Share by Installation Type (2021-2026)
- Figure 21. Product Picture of Standalone Closed-loop Air-to-Liquid CDU
- Figure 22. Product Picture of Facility-coupled Air-to-Liquid CDU
- Figure 23. Global Air-to-Liquid Coolant Distribution Unit (CDU) Sales Market Share by System Architecture in 2026
- Figure 24. Global Air-to-Liquid Coolant Distribution Unit (CDU) Revenue Market Share by System Architecture (2021-2026)

Figure 25. Air-to-Liquid Coolant Distribution Unit (CDU) Consumed in Edge Data Center CDU

Figure 26. Global Air-to-Liquid Coolant Distribution Unit (CDU) Market: Edge Data Center CDU (2021-2026) & (K Units)

Figure 27. Air-to-Liquid Coolant Distribution Unit (CDU) Consumed in Enterprise Data Center CDU

Figure 28. Global Air-to-Liquid Coolant Distribution Unit (CDU) Market: Enterprise Data Center CDU (2021-2026) & (K Units)

Figure 29. Air-to-Liquid Coolant Distribution Unit (CDU) Consumed in Hyperscale Data Center CDU

Figure 30. Global Air-to-Liquid Coolant Distribution Unit (CDU) Market: Hyperscale Data Center CDU (2021-2026) & (K Units)

Figure 31. Air-to-Liquid Coolant Distribution Unit (CDU) Consumed in HPC CDU

Figure 32. Global Air-to-Liquid Coolant Distribution Unit (CDU) Market: HPC CDU (2021-2026) & (K Units)

Figure 33. Air-to-Liquid Coolant Distribution Unit (CDU) Consumed in Others

Figure 34. Global Air-to-Liquid Coolant Distribution Unit (CDU) Market: Others (2021-2026) & (K Units)

Figure 35. Global Air-to-Liquid Coolant Distribution Unit (CDU) Sale Market Share by Application (2025)

Figure 36. Global Air-to-Liquid Coolant Distribution Unit (CDU) Revenue Market Share by Application in 2025

Figure 37. Air-to-Liquid Coolant Distribution Unit (CDU) Sales by Company in 2025 (K Units)

Figure 38. Global Air-to-Liquid Coolant Distribution Unit (CDU) Sales Market Share by Company in 2025

Figure 39. Air-to-Liquid Coolant Distribution Unit (CDU) Revenue by Company in 2025 (\$ millions)

Figure 40. Global Air-to-Liquid Coolant Distribution Unit (CDU) Revenue Market Share by Company in 2025

Figure 41. Global Air-to-Liquid Coolant Distribution Unit (CDU) Sales Market Share by Geographic Region (2021-2026)

Figure 42. Global Air-to-Liquid Coolant Distribution Unit (CDU) Revenue Market Share by Geographic Region in 2025

Figure 43. Americas Air-to-Liquid Coolant Distribution Unit (CDU) Sales 2021-2026 (K Units)

Figure 44. Americas Air-to-Liquid Coolant Distribution Unit (CDU) Revenue 2021-2026 (\$ millions)

Figure 45. APAC Air-to-Liquid Coolant Distribution Unit (CDU) Sales 2021-2026 (K

Units)

Figure 46. APAC Air-to-Liquid Coolant Distribution Unit (CDU) Revenue 2021-2026 (\$ millions)

Figure 47. Europe Air-to-Liquid Coolant Distribution Unit (CDU) Sales 2021-2026 (K Units)

Figure 48. Europe Air-to-Liquid Coolant Distribution Unit (CDU) Revenue 2021-2026 (\$ millions)

Figure 49. Middle East & Africa Air-to-Liquid Coolant Distribution Unit (CDU) Sales 2021-2026 (K Units)

Figure 50. Middle East & Africa Air-to-Liquid Coolant Distribution Unit (CDU) Revenue 2021-2026 (\$ millions)

Figure 51. Americas Air-to-Liquid Coolant Distribution Unit (CDU) Sales Market Share by Country in 2025

Figure 52. Americas Air-to-Liquid Coolant Distribution Unit (CDU) Revenue Market Share by Country (2021-2026)

Figure 53. Americas Air-to-Liquid Coolant Distribution Unit (CDU) Sales Market Share by Cooling Capacity (2021-2026)

Figure 54. Americas Air-to-Liquid Coolant Distribution Unit (CDU) Sales Market Share by Application (2021-2026)

Figure 55. United States Air-to-Liquid Coolant Distribution Unit (CDU) Revenue Growth 2021-2026 (\$ millions)

Figure 56. Canada Air-to-Liquid Coolant Distribution Unit (CDU) Revenue Growth 2021-2026 (\$ millions)

Figure 57. Mexico Air-to-Liquid Coolant Distribution Unit (CDU) Revenue Growth 2021-2026 (\$ millions)

Figure 58. Brazil Air-to-Liquid Coolant Distribution Unit (CDU) Revenue Growth 2021-2026 (\$ millions)

Figure 59. APAC Air-to-Liquid Coolant Distribution Unit (CDU) Sales Market Share by Region in 2025

Figure 60. APAC Air-to-Liquid Coolant Distribution Unit (CDU) Revenue Market Share by Region (2021-2026)

Figure 61. APAC Air-to-Liquid Coolant Distribution Unit (CDU) Sales Market Share by Cooling Capacity (2021-2026)

Figure 62. APAC Air-to-Liquid Coolant Distribution Unit (CDU) Sales Market Share by Application (2021-2026)

Figure 63. China Air-to-Liquid Coolant Distribution Unit (CDU) Revenue Growth 2021-2026 (\$ millions)

Figure 64. Japan Air-to-Liquid Coolant Distribution Unit (CDU) Revenue Growth 2021-2026 (\$ millions)

Figure 65. South Korea Air-to-Liquid Coolant Distribution Unit (CDU) Revenue Growth 2021-2026 (\$ millions)

Figure 66. Southeast Asia Air-to-Liquid Coolant Distribution Unit (CDU) Revenue Growth 2021-2026 (\$ millions)

Figure 67. India Air-to-Liquid Coolant Distribution Unit (CDU) Revenue Growth 2021-2026 (\$ millions)

Figure 68. Australia Air-to-Liquid Coolant Distribution Unit (CDU) Revenue Growth 2021-2026 (\$ millions)

Figure 69. China Taiwan Air-to-Liquid Coolant Distribution Unit (CDU) Revenue Growth 2021-2026 (\$ millions)

Figure 70. Europe Air-to-Liquid Coolant Distribution Unit (CDU) Sales Market Share by Country in 2025

Figure 71. Europe Air-to-Liquid Coolant Distribution Unit (CDU) Revenue Market Share by Country (2021-2026)

Figure 72. Europe Air-to-Liquid Coolant Distribution Unit (CDU) Sales Market Share by Cooling Capacity (2021-2026)

Figure 73. Europe Air-to-Liquid Coolant Distribution Unit (CDU) Sales Market Share by Application (2021-2026)

Figure 74. Germany Air-to-Liquid Coolant Distribution Unit (CDU) Revenue Growth 2021-2026 (\$ millions)

Figure 75. France Air-to-Liquid Coolant Distribution Unit (CDU) Revenue Growth 2021-2026 (\$ millions)

Figure 76. UK Air-to-Liquid Coolant Distribution Unit (CDU) Revenue Growth 2021-2026 (\$ millions)

Figure 77. Italy Air-to-Liquid Coolant Distribution Unit (CDU) Revenue Growth 2021-2026 (\$ millions)

Figure 78. Russia Air-to-Liquid Coolant Distribution Unit (CDU) Revenue Growth 2021-2026 (\$ millions)

Figure 79. Middle East & Africa Air-to-Liquid Coolant Distribution Unit (CDU) Sales Market Share by Country (2021-2026)

Figure 80. Middle East & Africa Air-to-Liquid Coolant Distribution Unit (CDU) Sales Market Share by Cooling Capacity (2021-2026)

Figure 81. Middle East & Africa Air-to-Liquid Coolant Distribution Unit (CDU) Sales Market Share by Application (2021-2026)

Figure 82. Egypt Air-to-Liquid Coolant Distribution Unit (CDU) Revenue Growth 2021-2026 (\$ millions)

Figure 83. South Africa Air-to-Liquid Coolant Distribution Unit (CDU) Revenue Growth 2021-2026 (\$ millions)

Figure 84. Israel Air-to-Liquid Coolant Distribution Unit (CDU) Revenue Growth

2021-2026 (\$ millions)

Figure 85. Turkey Air-to-Liquid Coolant Distribution Unit (CDU) Revenue Growth

2021-2026 (\$ millions)

Figure 86. GCC Countries Air-to-Liquid Coolant Distribution Unit (CDU) Revenue

Growth 2021-2026 (\$ millions)

Figure 87. Manufacturing Cost Structure Analysis of Air-to-Liquid Coolant Distribution Unit (CDU) in 2026

Figure 88. Manufacturing Process Analysis of Air-to-Liquid Coolant Distribution Unit (CDU)

Figure 89. Industry Chain Structure of Air-to-Liquid Coolant Distribution Unit (CDU)

Figure 90. Channels of Distribution

Figure 91. Global Air-to-Liquid Coolant Distribution Unit (CDU) Sales Market Forecast by Region (2027-2032)

Figure 92. Global Air-to-Liquid Coolant Distribution Unit (CDU) Revenue Market Share Forecast by Region (2027-2032)

Figure 93. Global Air-to-Liquid Coolant Distribution Unit (CDU) Sales Market Share Forecast by Cooling Capacity (2027-2032)

Figure 94. Global Air-to-Liquid Coolant Distribution Unit (CDU) Revenue Market Share Forecast by Cooling Capacity (2027-2032)

Figure 95. Global Air-to-Liquid Coolant Distribution Unit (CDU) Sales Market Share Forecast by Application (2027-2032)

Figure 96. Global Air-to-Liquid Coolant Distribution Unit (CDU) Revenue Market Share Forecast by Application (2027-2032)

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