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Global Coolant Distribution Unit (CDU) Plate Heat Exchangers Market Growth 2026-2032

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Abstracts

The global Coolant Distribution Unit (CDU) Plate Heat Exchangers market size is predicted to grow from US$ 158 million in 2025 to US$ 681 million in 2032; it is expected to grow at a CAGR of 22.3% from 2026 to 2032.

Coolant Distribution Unit (CDU) plate heat exchangers are liquid-to-liquid heat transfer components installed within data center coolant distribution units to transfer heat between the Technology Cooling System (TCS) and the Facility Water System (FWS) while maintaining hydraulic separation between the two circuits. The market primarily covers brazed plate heat exchangers, fusion-bonded or all-stainless plate heat exchangers, and gasketed plate-and-frame heat exchangers specifically designed or commercially supplied for CDU applications. Key product parameters include cooling capacity, approach temperature, pressure drop, flow rate, plate and joining materials, pass configuration, coolant compatibility, footprint, and long-term operating reliability. Products are used in in-rack, in-row, perimeter, and facility-level CDUs supporting direct-to-chip liquid cooling, high-density AI servers, GPU clusters, high-performance computing, hyperscale data centers, colocation facilities, and enterprise data centers. Current product development is increasingly focused on compact high-capacity designs, low approach temperatures, low hydraulic resistance, high coolant compatibility, and reliable continuous operation as CDU capacities move from rack-level hundreds of kilowatts toward megawatt-class systems. OCP Project Deschutes has further strengthened industry requirements around 2 MW-class CDUs, 3°C approach temperatures, and high-flow liquid distribution.

Key FindingsThe average selling price of CDU plate heat exchangers was approximately US$6,800 per unit in 2025.The industry-wide gross margin was approximately 30%–40% in 2025.Brazed plate heat exchangers remain the mainstream

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product type for CDU applications.In-rack CDUs and in-row CDUs are the primary deployment formats.Europe is a major production region for high-performance CDU plate heat exchangers.

Market Trends

The primary technology trend is the transition from conventional general-purpose plate heat exchangers toward products optimized specifically for data center CDUs. Product design is increasingly centered on very low approach temperatures, reduced pressure loss, compact footprint, high-volume liquid flow, and continuous-duty reliability. Danfoss' B3-260C, for example, is optimized for CDU applications up to approximately 1 MW and for very low LMTD conditions of around 2 K, illustrating the move toward higher thermal effectiveness without excessive pumping energy.

A second major trend is capacity escalation. OCP-compliant CDU platforms are increasingly targeting 2 MW cooling capacity at approximately 3°C approach temperature and around 500 GPM flow rates. This is pushing plate heat exchanger suppliers toward larger heat-transfer surfaces, optimized plate geometries, multi-pass configurations, parallel exchanger arrangements, and higher structural reliability.

Market Dynamics

Drivers

AI accelerator power density is the most important structural driver. As CPU and GPU thermal loads rise, direct-to-chip liquid cooling is becoming increasingly necessary in high-density computing environments. CDU plate heat exchangers enable the IT cooling circuit to reject heat efficiently to the facility cooling system while maintaining separation between the two hydraulic loops. Higher rack densities also increase demand for greater heat-transfer capacity within limited CDU cabinet space.

Standardization is another positive factor. OCP has established a dedicated Coolant Distribution Unit sub-project and Project Deschutes reference architecture, promoting common requirements for cooling capacity, flow rate, pressure availability, filtration, redundancy, and approach temperature. Wider adoption of such specifications should support more standardized procurement and accelerate the transition from highly customized CDU heat exchangers toward scalable product platforms.

Restraints

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The main restraint is the demanding combination of thermal and hydraulic requirements. Increasing heat-transfer capacity cannot be achieved simply by increasing exchanger size because CDU designs are constrained by cabinet space, pump power, pressure drop, coolant cleanliness, material compatibility, and reliability. The requirement to minimize the temperature difference between the technology cooling loop and the facility loop places additional demands on plate geometry and manufacturing consistency.

Another restraint is qualification complexity. CDU heat exchangers must operate continuously in mission-critical data center environments, and material selection, brazing quality, corrosion resistance, cleanliness, pressure fatigue, and coolant compatibility can materially influence system reliability. These requirements create qualification barriers for smaller general-purpose plate heat exchanger suppliers.

Opportunities

The strongest opportunity lies in megawatt-class AI CDU systems. The industry is moving from tens or hundreds of kilowatts per CDU toward 1 MW to more than 2 MW configurations, increasing the value of high-performance plate heat exchangers and creating demand for larger brazed products, optimized plate patterns, low-LMTD designs, and parallel exchanger architectures.

Capacity investment is also accelerating. SWEP announced an additional US$30 million manufacturing investment for 2026–2027 across its five factories, with planned capacity for larger-sized products expected to more than double. The investment is explicitly linked in part to global AI data center and liquid-cooling demand, indicating that leading suppliers are preparing for sustained volume growth in high-capacity heat exchangers.

Challenges

Technology differentiation is becoming increasingly difficult to sustain as CDU requirements converge around high efficiency, low pressure drop, small approach temperature, and compact dimensions. Suppliers must therefore compete not only on thermal performance but also on validation capability, manufacturing consistency, global supply capacity, material compatibility, and application engineering.

Another challenge is rapid specification evolution. Data center power density and cooling architecture are changing faster than traditional HVAC product cycles. A heat exchanger optimized for current rack densities may need redesign as CDU capacities, flow requirements, coolant chemistries, and system pressure requirements increase.

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This raises engineering investment and testing requirements for manufacturers.

Industry Chain Analysis

The upstream supply chain includes stainless-steel plate materials, copper or nickel brazing materials, gasket materials, stainless-steel frames, ports and fittings, tooling, presses, brazing furnaces, welding equipment, and testing systems. Stainless steel quality, plate-forming accuracy, brazing consistency, and surface cleanliness directly affect thermal efficiency and reliability.

The midstream consists of plate heat exchanger manufacturers responsible for thermal design, plate stamping, brazing or fusion bonding, assembly, pressure testing, performance validation, and application engineering. Downstream customers are primarily CDU OEMs and data center thermal-management system providers, which integrate the heat exchanger with pumps, filters, valves, sensors, controls, piping, and redundancy systems before deployment in AI, hyperscale, colocation, enterprise, and HPC data centers.

Value Chain Analysis

The highest value is increasingly concentrated in application-specific thermal design rather than basic metal fabrication. High-performance CDU products require optimization of plate pattern, channel geometry, pass arrangement, material selection, flow distribution, approach temperature, and pressure drop. Suppliers capable of matching exchanger design directly to CDU operating conditions typically occupy the higher-value portion of the market.

Manufacturing scale and validation capability are also becoming important sources of value. As CDU capacities reach megawatt levels, customers increasingly require stable global supply, repeatable performance, pressure integrity, long operating life, and engineering support. This favors manufacturers with integrated design, stamping, brazing, testing, and global production capabilities.

Segment Insights

By heat exchanger construction, brazed plate heat exchangers represent the mainstream CDU solution, particularly in compact in-rack and in-row applications. Fusion-bonded all-stainless products serve applications requiring greater compatibility with deionized water or restrictive coolant chemistries, while gasketed plate-and-frame

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exchangers remain relevant for larger systems where serviceability and capacity flexibility are more important.

By cooling capacity, the market is shifting toward higher-capacity products. The ?100 kW and >100–250 kW ranges mainly serve rack-level and compact CDU installations, while the >250 kW–1 MW segment serves larger in-row systems. The >1 MW category is becoming increasingly important for AI and hyperscale environments as 2 MW-class CDU designs move toward broader commercialization.

Downstream Market Opportunities

Direct-to-chip cooling represents the most important downstream opportunity because it requires an efficient liquid-to-liquid thermal interface between server-side cooling loops and facility water systems. Increasing GPU cluster density is strengthening demand for both in-rack and in-row CDUs, with the latter providing particularly strong opportunities for larger and higher-value heat exchangers.

Hyperscale and AI data centers are expected to lead high-capacity demand, while colocation providers represent another attractive market as they upgrade existing facilities to support liquid-cooled customer workloads. Enterprise and HPC facilities provide additional demand, particularly where high thermal density or space constraints make conventional air cooling insufficient.

Regional Insights

Europe maintains a strong technology and supply position in CDU plate heat exchangers, supported by a mature concentration of brazed, fusion-bonded, and gasketed plate heat exchanger manufacturing capabilities. The region is particularly strong in high-efficiency thermal design, plate technology, and global production networks.

Asia is becoming increasingly important from both the manufacturing and demand perspectives. China and Taiwan have developed dedicated CDU plate heat exchanger product portfolios ranging from rack-level products to several-hundred-kilowatt systems. China’s domestic AI infrastructure expansion and localization of data center thermal-management supply chains are creating additional opportunities for regional manufacturers. North America remains a major demand market for high-capacity AI and hyperscale CDUs and is also attracting additional localized exchanger manufacturing investment.

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Competitive Landscape Analysis

The competitive structure is relatively concentrated compared with the downstream CDU system market. Europe has the deepest pool of established high-performance plate heat exchanger manufacturers and remains particularly strong in brazed and gasketed technologies. North America has fewer specialist manufacturers but benefits from proximity to large hyperscale and AI data center customers, supporting demand for high-capacity and customized products.

Asian competition is becoming more significant. Taiwan has established specialist brazed plate heat exchanger capability in rack-level and in-row CDU applications, while China is expanding rapidly through domestic thermal-management manufacturers and dedicated data center product development. Competition is therefore shifting from a historically Europe-led technology structure toward a more geographically diversified supply base, with product performance, manufacturing scale, qualification capability, and local engineering support becoming increasingly important differentiators.

Report Scope

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

This Insight Report provides a comprehensive analysis of the global Coolant Distribution Unit (CDU) Plate Heat Exchangers 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 Coolant Distribution Unit (CDU) Plate Heat Exchangers portfolios and capabilities, market entry strategies, market positions, and geographic footprints, to better understand these firms’ unique position in an accelerating global Coolant Distribution Unit (CDU) Plate Heat Exchangers market.

This Insight Report evaluates the key market trends, drivers, and affecting factors shaping the global outlook for Coolant Distribution Unit (CDU) Plate Heat Exchangers

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and breaks down the forecast by Type, 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 Coolant Distribution Unit (CDU) Plate Heat Exchangers.

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

Market Segmentation

Segmentation by Type:

Brazed Plate Heat Exchangers

Fusion-Bonded Plate Heat Exchangers

Gasketed Plate-and-Frame Heat Exchangers

Others

Segmentation by Cooling Capacity:

?100 kW

>100–250 kW

>250 kW–1 MW

>1 MW

Segmentation by Coolant Type:

Water-Based Coolants

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Water-Glycol Coolants

Dielectric Coolants

Others

Segmentation by Application:

Hyperscale Data Centers

Colocation Data Centers

Enterprise Data Centers

High-Performance Computing Centers

AI Data Centers

Others

This report also splits the market by region:

Americas

United States

Canada

Mexico

Brazil

APAC

China

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- 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.

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Alfa Laval AB

SWEP International AB

Danfoss A/S

KAORI Heat Treatment Co., Ltd.

API Heat Transfer Inc.

Tranter, Inc.

Kelvion Holding GmbH

Zhejiang Sanhua Intelligent Controls Co., Ltd.

HISAKA WORKS, LTD.

Nidec Corporation

Key Questions Addressed in this Report

What is the 10-year outlook for the global Coolant Distribution Unit (CDU) Plate Heat Exchangers market?

What factors are driving Coolant Distribution Unit (CDU) Plate Heat Exchangers market growth, globally and by region?

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

How do Coolant Distribution Unit (CDU) Plate Heat Exchangers market opportunities vary by end market size?

How does Coolant Distribution Unit (CDU) Plate Heat Exchangers break out by Type, by Application?

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