

Global Coolant Distribution Units for AI Training and HPC Data Centers Market Growth 2026-2032

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Abstracts

The global Coolant Distribution Units for AI Training and HPC Data Centers market size is predicted to grow from US\$ 1057 million in 2025 to US\$ 5691 million in 2032; it is expected to grow at a CAGR of 26.3% from 2026 to 2032.

Coolant Distribution Units for AI and HPC data centers are specialised liquid-cooling infrastructure modules designed to bridge the facility cooling loop and the IT-side technology cooling loop in high-density computing environments. They perform heat exchange, hydraulic separation, coolant distribution, flow regulation, pressure control, temperature management, filtration, reservoir management, leak detection and supervisory control for direct-to-chip cold plates, rear-door heat exchangers, liquid-cooled racks and selected immersion-cooling interfaces. In practical deployments, CDUs may be delivered as in-rack, in-row, centralised, modular or megawatt-scale platforms, with liquid-to-liquid and liquid-to-air designs representing the most common architectures. Their value lies in maintaining stable coolant quality and operating conditions for CPUs, GPUs, accelerators and ASIC clusters running under sustained high thermal loads. Typical system pricing can range from tens of thousands of US dollars for compact rack-level units to several hundred thousand or more than one million US dollars for high-capacity, redundant, megawatt-scale systems, depending on cooling capacity, redundancy, control sophistication, fluid compatibility, cleanliness requirements, qualification standards and integration scope.

Based on our research, the CDU market for AI and HPC data centers should not be interpreted as a conventional HVAC sub-segment. Its strategic role is to act as the hydraulic and thermal control layer between facility cooling and IT-side liquid cooling. As rack densities move beyond the practical limits of air cooling, CDUs become an enabling infrastructure layer for direct-to-chip cooling, rear-door heat exchangers and

liquid-cooled rack deployments. The product is increasingly defined not only by nameplate cooling capacity, but also by pump redundancy, cleanliness control, approach temperature, telemetry, leak detection, controls integration, fluid compatibility and serviceability. Public product information from Vertiv, Rittal, STULZ and LiquidStack indicates that CDU platforms are now being designed for high-density AI and HPC environments rather than for isolated experimental deployments.

The global supply structure is becoming multi-layered. Data center infrastructure incumbents, specialist liquid-cooling companies, precision-cooling manufacturers and regional thermal-management players are all competing for position. Vertiv, Schneider Electric with Motivair, Eaton with Boyd Thermal, CoolIT, Delta and nVent form the most visible core group, while Rittal, STULZ, Airedale, Johnson Controls/Silent-Aire, LiquidStack and Envicool broaden the competitive field. Recent acquisitions involving Motivair, Boyd Thermal and CoolIT show that liquid-cooling capability has become a strategic asset for global industrial groups seeking exposure to AI infrastructure growth.

Demand is being pulled by three main customer groups: hyperscale AI factories, colocation and cloud operators upgrading high-density halls, and HPC or sovereign computing facilities. Customers are moving from equipment-level procurement to system-level qualification, requiring CDUs to be compatible with cold plates, rack manifolds, rear-door heat exchangers, facility water loops, power systems and monitoring platforms. This explains why the competitive advantage is shifting from basic thermal capacity toward validated architectures, deployment speed, controls, service networks and long-term reliability. The emergence of megawatt-scale CDU platforms from LiquidStack, Johnson Controls/Silent-Aire, Delta and LG confirms that the market is moving from rack-level retrofits toward large-scale liquid-cooled infrastructure blocks.

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

This Insight Report provides a comprehensive analysis of the global Coolant Distribution Units for AI Training and HPC Data Centers 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 Units for AI Training and HPC Data Centers portfolios and capabilities, market entry strategies, market positions, and geographic footprints, to better understand these firms' unique position in an accelerating global Coolant Distribution Units for AI Training and HPC Data Centers market.

This Insight Report evaluates the key market trends, drivers, and affecting factors shaping the global outlook for Coolant Distribution Units for AI Training and HPC Data Centers and breaks down the forecast by Heat Transfer Architecture, 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 Units for AI Training and HPC Data Centers.

This report presents a comprehensive overview, market shares, and growth opportunities of Coolant Distribution Units for AI Training and HPC Data Centers market by product type, application, key manufacturers and key regions and countries.

Segmentation by Heat Transfer Architecture:

Liquid-to-Liquid CDU

Liquid-to-Air CDU

Two-phase / Specialty-fluid CDU

Other

Segmentation by Deployment Form Factor:

In-Rack CDU

In-Row CDU

Centralized / Plant-room CDU

Modular / Containerized CDU

Segmentation by Cooling Capacity Class:

?100 kW

100?500 kW

500 kW?2 MW

>2 MW

Segmentation by Served Cooling Endpoint:

Direct-to-Chip Cold Plate

Rear Door Heat Exchanger

Liquid-cooled Rack / Manifold

Immersion Interface

Other

Segmentation by Application:

AI Training Cluster / AI Factory

HPC / Supercomputing

Hyperscale Cloud / Colocation

Enterprise / Edge High-density IT

Other

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

Schneider Electric Motivair

Eaton Boyd Thermal

CoolIT Systems

Delta Electronics

nVent Electric

Envicool

Rittal

Johnson Controls Silent-Aire

LiquidStack

STULZ

LG Electronics

Airedale by Modine

Daikin

Asetek

Chilldyne

DCX Liquid Cooling Systems

Key Questions Addressed in this Report

What is the 10-year outlook for the global Coolant Distribution Units for AI Training and HPC Data Centers market?

What factors are driving Coolant Distribution Units for AI Training and HPC Data Centers market growth, globally and by region?

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

How do Coolant Distribution Units for AI Training and HPC Data Centers market opportunities vary by end market size?

How does Coolant Distribution Units for AI Training and HPC Data Centers break out by Heat Transfer Architecture, by Application?

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