

Global Data Center CDU Market Growth 2026-2032

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Abstracts

The global Data Center CDU market size is predicted to grow from US\$ 1308 million in 2025 to US\$ 4484 million in 2032; it is expected to grow at a CAGR of 19.2% from 2026 to 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 is used in data center and plays a critical role in maintaining the proper functioning of liquid 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 CDU reached approximately 88 K units, with an average global market price of around US\$ 15 K/unit. Production capacity varies significantly among manufacturers, with gross profit margins ranging from approximately 30% to 50%.

Coolant distribution unit (CDU) is a system that enables smaller, more efficient, more precise liquid cooling in a data center at rack level, often integrating facility water. The CDU circulates coolant in a closed loop system within the rack on the secondary (Cooling Application) side and utilizes facility water on the primary (Heat Rejection) side. A CDU has a pump, reservoir, power supply, control board and a heat-exchanger as the

key components. Filters, flow meters, pressure transducers, and other devices are also used in managing the operation of the CDU in conjunction with the server rack.

With data center workloads ever increasing due to advanced analytics, AI, and the digitization of every process, the average rack power draw has shot up considerably. And, as we know, with more power draw comes more waste heat that needs to be removed from the rack and eventually the white space. Based on this, liquid cooling technology is gradually replacing traditional air cooling technology to provide high performance solutions to data centers. As a key part of liquid cooling system, CDU will benefit from the permeability of liquid cooling in data centers accordingly.

As data center footprints continue to shrink due to urbanization and real estate constraints, optimizing space utilization has become a pressing priority for data center managers. Liquid cooling solutions offer a compact and space-efficient alternative to traditional air cooling systems, enabling data centers to maximize their rack densities and floor space without compromising thermal performance. Moreover, the scalability of liquid cooling systems makes them well-suited for accommodating future growth and expansion. By modularizing cooling infrastructure and deploying liquid cooling units in a distributed manner, data centers can easily scale their cooling capacity in response to changing workload demands. This flexibility not only enhances operational agility but also streamlines the deployment of new IT equipment without the need for extensive retrofitting or reconfiguration.

In an era marked by growing environmental consciousness and stringent energy regulations, data centers are under increasing pressure to enhance their sustainability practices. Liquid cooling technologies present a compelling solution to address these concerns by reducing overall energy consumption and carbon footprint. Unlike air cooling, which relies on fans to circulate air and dissipate heat, liquid cooling systems leverage the superior thermal conductivity of liquids to efficiently remove heat from IT equipment. This results in lower cooling energy requirements and operational costs, translating into tangible environmental benefits and long-term cost savings for data center operators. Additionally, liquid cooling enables the reuse of waste heat for heating purposes, further maximizing energy efficiency and sustainability efforts.

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

millions of the world Data Center CDU industry.

This Insight Report provides a comprehensive analysis of the global Data Center 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 Data Center CDU portfolios and capabilities, market entry strategies, market positions, and geographic footprints, to better understand these firms' unique position in an accelerating global Data Center CDU market.

This Insight Report evaluates the key market trends, drivers, and affecting factors shaping the global outlook for Data Center CDU 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 Data Center CDU.

This report presents a comprehensive overview, market shares, and growth opportunities of Data Center CDU market by product type, application, key manufacturers and key regions and countries.

Segmentation by Type:

Liquid to Liquid CDU

Liquid to Air CDU

Segmentation by Installation Level:

Rack-based CDU

Row-based CDU

Other

Segmentation by Capacity:

Capacity ? 100kW

Capacity ? 100kW

Segmentation by Application:

Internet

Telecommunications

Finance

Government

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

Schneider Electric

nVent

CoolIT Systems

Boyd

Envicool

Nortek DCC

Delta Electronics

Coolcentric

Nidec

DCX

Chilldyne

Kehua Data

Key Questions Addressed in this Report

What is the 10-year outlook for the global Data Center CDU market?

What factors are driving Data Center CDU market growth, globally and by region?

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

How do Data Center CDU market opportunities vary by end market size?

How does Data Center CDU break out by Type, by Application?

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