

Global High-Density Rack Power Distribution Unit?rPDU?for Liquid-Cooled Data Centers Market Growth 2026-2032

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Abstracts

The global High-Density Rack Power Distribution Unit?rPDU?for Liquid-Cooled Data Centers market size is predicted to grow from US\$ 763 million in 2025 to US\$ 2423 million in 2032; it is expected to grow at a CAGR of 17.1% from 2026 to 2032.

A high-density rack power distribution unit, or rPDU, for liquid-cooled data centers is a rack-level electrical distribution device installed inside or alongside server cabinets in AI, HPC, hyperscale, colocation and other high-density computing environments. It distributes power from upstream busway, remote power panels, floor PDUs, switchboards or UPS outputs to servers, GPU systems, networking equipment, storage devices and associated rack-level IT loads. In high-density liquid-cooled deployments, such rPDUs are typically designed around three-phase input, high-current capacity, C13/C19 or hybrid outlet architectures, branch protection, phase balancing, remote metering, environmental sensing, DCIM integration, optional outlet-level switching and A/B-feed redundancy.

Commercial pricing ranges from low-cost basic rack strips to several thousand dollars for intelligent high-density three-phase models, while highly customised 60A, 63A, 100A or AI-rack-oriented configurations can exceed USD 10,000 depending on certification, input topology, monitoring granularity and project-specific requirements.

The high-density rack PDU for liquid-cooled data centers should be understood as an upgraded rack-level power distribution device rather than a completely new equipment class. Its defining feature is not that the PDU itself is liquid-cooled, but that it is engineered for data center racks where liquid cooling, AI accelerators and high-performance computing loads drive power density far beyond traditional enterprise IT

levels. In this context, the product's function shifts from basic outlet distribution to safe, measurable and remotely manageable delivery of high-current power to mission-critical rack-level loads. The most appropriate market boundary is therefore a narrow one: three-phase, high-current, intelligent, monitored, switched or metered rack PDUs used in AI, HPC, hyperscale, colocation and liquid-cooled high-density environments.

The supply structure is led by a small group of global electrical and data center infrastructure companies. Legrand, Schneider Electric, Vertiv and Eaton represent the most visible global tier, supported by broad product portfolios, strong data center customer access and mature rack power platforms. A second group, including Panduit, nVent, Chatsworth Products, Rittal, Bachmann, Schleifenbauer, Socomec, Delta Electronics, ATEN, Austin Hughes and Clever Electronic, addresses regional, customised or application-specific demand. This layered structure is important: the broad vendor pool is wider than the core formal list, but not every supplier of rack accessories, busway, UPS or data center integration services should be counted as a true high-density rack PDU manufacturer.

Demand growth is being driven primarily by AI and accelerated computing infrastructure. Liquid-cooled racks tend to carry higher-value IT loads, higher current requirements and stricter uptime expectations, which increases the value of intelligent power metering, remote switching, branch-level protection, outlet-level visibility and environmental sensing. In high-density deployments, customers increasingly evaluate rack PDUs not only by amperage and outlet count, but also by thermal operating range, cybersecurity, DCIM compatibility, load balancing, redundancy and deployment flexibility. This is why intelligent and high-density rPDUs are expected to outgrow basic rack power strips.

The technology pathway is moving toward higher current ratings, three-phase architectures, hybrid outlets, denser form factors and richer telemetry. However, the longer-term emergence of high-voltage DC rack architectures may gradually change part of the addressable market. Google's public discussion of moving from 48VDC to 400VDC for 100kW to 1MW IT racks indicates that rack-level power delivery is entering a period of architectural experimentation. Even so, for most commercial deployments between 2026 and 2032, intelligent three-phase AC rack PDUs are expected to remain the dominant practical solution because they fit existing upstream distribution architectures and global operating practices.

LP Information, Inc. (LPI) ' newest research report, the "High-Density Rack Power Distribution Unit (rPDU) for Liquid-Cooled Data Centers Industry Forecast" looks at past

sales and reviews total world High-Density Rack Power Distribution Unit (PDU) for Liquid-Cooled Data Centers sales in 2025, providing a comprehensive analysis by region and market sector of projected High-Density Rack Power Distribution Unit (PDU) for Liquid-Cooled Data Centers sales for 2026 through 2032. With High-Density Rack Power Distribution Unit (PDU) for Liquid-Cooled Data Centers sales broken down by region, market sector and sub-sector, this report provides a detailed analysis in US\$ millions of the world High-Density Rack Power Distribution Unit (PDU) for Liquid-Cooled Data Centers industry.

This Insight Report provides a comprehensive analysis of the global High-Density Rack Power Distribution Unit (PDU) for Liquid-Cooled 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 High-Density Rack Power Distribution Unit (PDU) for Liquid-Cooled Data Centers portfolios and capabilities, market entry strategies, market positions, and geographic footprints, to better understand these firms' unique position in an accelerating global High-Density Rack Power Distribution Unit (PDU) for Liquid-Cooled Data Centers market.

This Insight Report evaluates the key market trends, drivers, and affecting factors shaping the global outlook for High-Density Rack Power Distribution Unit (PDU) for Liquid-Cooled Data Centers and breaks down the forecast by Product Function, 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 High-Density Rack Power Distribution Unit (PDU) for Liquid-Cooled Data Centers.

This report presents a comprehensive overview, market shares, and growth opportunities of High-Density Rack Power Distribution Unit (PDU) for Liquid-Cooled Data Centers market by product type, application, key manufacturers and key regions and countries.

Segmentation by Product Function:

Basic Rack PDU

Metered / Monitored Rack PDU

Switched / Managed Rack PDU

Transfer / Redundant Rack PDU

Other

Segmentation by Power Rating:

Standard Power Rack PDU

High-Power Rack PDU

Ultra-High-Power Rack PDU

Other

Segmentation by Mounting Form Factor:

Vertical 0U Rack PDU

Horizontal 1U Rack PDU

Multi-U / High-Capacity PDU

Custom Rack-Integrated PDU

Segmentation by Electrical Input:

Single-Phase AC PDU

Three-Phase AC PDU

High-Voltage AC PDU

Other

Segmentation by Application:

AI Training / Inference Data Centers

HPC / Supercomputing

Hyperscale Cloud Data Centers

Colocation / Enterprise Data Centers

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.

Legrand

Schneider Electric

Vertiv

Eaton

Panduit

nVent Electric

Chatsworth Products

Rittal

Bachmann Group

Schleifenbauer Products B.V.

Socomec

Delta Electronics

ATEN International

CyberPower Systems

Austin Hughes

Ahoku Electronic

Shenzhen Clever Electronic

Sanwa Supply

GUDE Systems

DaTangBG

Key Questions Addressed in this Report

What is the 10-year outlook for the global High-Density Rack Power Distribution Unit?rPDU?for Liquid-Cooled Data Centers market?

What factors are driving High-Density Rack Power Distribution Unit?rPDU?for Liquid-Cooled Data Centers market growth, globally and by region?

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

How do High-Density Rack Power Distribution Unit?rPDU?for Liquid-Cooled Data Centers market opportunities vary by end market size?

How does High-Density Rack Power Distribution Unit?rPDU?for Liquid-Cooled Data Centers break out by Product Function, 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 High-Density Rack Power Distribution Unit?rPDU?for Liquid-Cooled Data Centers Annual Sales 2021-2032

2.1.2 World Current & Future Analysis for High-Density Rack Power Distribution Unit?rPDU?for Liquid-Cooled Data Centers by Geographic Region, 2021, 2025 & 2032

2.1.3 World Current & Future Analysis for High-Density Rack Power Distribution Unit?rPDU?for Liquid-Cooled Data Centers by Country/Region, 2021, 2025 & 2032

2.2 High-Density Rack Power Distribution Unit?rPDU?for Liquid-Cooled Data Centers Segment by Product Function

2.2.1 Basic Rack PDU

2.2.2 Metered / Monitored Rack PDU

2.2.3 Switched / Managed Rack PDU

2.2.4 Transfer / Redundant Rack PDU

2.2.5 Other

2.2.6 High-Density Rack Power Distribution Unit?rPDU?for Liquid-Cooled Data Centers Sales by Product Function

2.2.6.1 Global High-Density Rack Power Distribution Unit?rPDU?for Liquid-Cooled Data Centers Sales Market Share by Product Function (2021-2026)

2.2.6.2 Global High-Density Rack Power Distribution Unit?rPDU?for Liquid-Cooled Data Centers Revenue and Market Share by Product Function (2021-2026)

2.2.6.3 Global High-Density Rack Power Distribution Unit?rPDU?for Liquid-Cooled Data Centers Sale Price by Product Function (2021-2026)

2.3 High-Density Rack Power Distribution Unit?rPDU?for Liquid-Cooled Data Centers Segment by Power Rating

2.3.1 Standard Power Rack PDU

2.3.2 High-Power Rack PDU

2.3.3 Ultra-High-Power Rack PDU

2.3.4 Other

2.3.5 High-Density Rack Power Distribution Unit?rPDU?for Liquid-Cooled Data Centers Sales by Power Rating

2.3.5.1 Global High-Density Rack Power Distribution Unit?rPDU?for Liquid-Cooled Data Centers Sales Market Share by Power Rating (2021-2026)

2.3.5.2 Global High-Density Rack Power Distribution Unit?rPDU?for Liquid-Cooled Data Centers Revenue and Market Share by Power Rating (2021-2026)

2.3.5.3 Global High-Density Rack Power Distribution Unit?rPDU?for Liquid-Cooled Data Centers Sale Price by Power Rating (2021-2026)

2.4 High-Density Rack Power Distribution Unit?rPDU?for Liquid-Cooled Data Centers Segment by Mounting Form Factor

2.4.1 Vertical 0U Rack PDU

2.4.2 Horizontal 1U Rack PDU

2.4.3 Multi-U / High-Capacity PDU

2.4.4 Custom Rack-Integrated PDU

2.4.5 High-Density Rack Power Distribution Unit?rPDU?for Liquid-Cooled Data Centers Sales by Mounting Form Factor

2.4.5.1 Global High-Density Rack Power Distribution Unit?rPDU?for Liquid-Cooled Data Centers Sales Market Share by Mounting Form Factor (2021-2026)

2.4.5.2 Global High-Density Rack Power Distribution Unit?rPDU?for Liquid-Cooled Data Centers Revenue and Market Share by Mounting Form Factor (2021-2026)

2.4.5.3 Global High-Density Rack Power Distribution Unit?rPDU?for Liquid-Cooled Data Centers Sale Price by Mounting Form Factor (2021-2026)

2.5 High-Density Rack Power Distribution Unit?rPDU?for Liquid-Cooled Data Centers Segment by Electrical Input

2.5.1 Single-Phase AC PDU

2.5.2 Three-Phase AC PDU

2.5.3 High-Voltage AC PDU

2.5.4 Other

2.5.5 High-Density Rack Power Distribution Unit?rPDU?for Liquid-Cooled Data Centers Sales by Electrical Input

2.5.5.1 Global High-Density Rack Power Distribution Unit?rPDU?for Liquid-Cooled Data Centers Sales Market Share by Electrical Input (2021-2026)

2.5.5.2 Global High-Density Rack Power Distribution Unit?rPDU?for Liquid-Cooled Data Centers Revenue and Market Share by Electrical Input (2021-2026)

2.5.5.3 Global High-Density Rack Power Distribution Unit?rPDU?for Liquid-Cooled

Data Centers Sale Price by Electrical Input (2021-2026)

2.6 High-Density Rack Power Distribution Unit?rPDU?for Liquid-Cooled Data Centers Segment by Application

2.6.1 AI Training / Inference Data Centers

2.6.2 HPC / Supercomputing

2.6.3 Hyperscale Cloud Data Centers

2.6.4 Colocation / Enterprise Data Centers

2.6.5 Other

2.6.6 High-Density Rack Power Distribution Unit?rPDU?for Liquid-Cooled Data Centers Sales by Application

2.6.6.1 Global High-Density Rack Power Distribution Unit?rPDU?for Liquid-Cooled Data Centers Sale Market Share by Application (2021-2026)

2.6.6.2 Global High-Density Rack Power Distribution Unit?rPDU?for Liquid-Cooled Data Centers Revenue and Market Share by Application (2021-2026)

2.6.6.3 Global High-Density Rack Power Distribution Unit?rPDU?for Liquid-Cooled Data Centers Sale Price by Application (2021-2026)

3 GLOBAL BY COMPANY

3.1 Global High-Density Rack Power Distribution Unit?rPDU?for Liquid-Cooled Data Centers Breakdown Data by Company

3.1.1 Global High-Density Rack Power Distribution Unit?rPDU?for Liquid-Cooled Data Centers Annual Sales by Company (2021-2026)

3.1.2 Global High-Density Rack Power Distribution Unit?rPDU?for Liquid-Cooled Data Centers Sales Market Share by Company (2021-2026)

3.2 Global High-Density Rack Power Distribution Unit?rPDU?for Liquid-Cooled Data Centers Annual Revenue by Company (2021-2026)

3.2.1 Global High-Density Rack Power Distribution Unit?rPDU?for Liquid-Cooled Data Centers Revenue by Company (2021-2026)

3.2.2 Global High-Density Rack Power Distribution Unit?rPDU?for Liquid-Cooled Data Centers Revenue Market Share by Company (2021-2026)

3.3 Global High-Density Rack Power Distribution Unit?rPDU?for Liquid-Cooled Data Centers Sale Price by Company

3.4 Key Manufacturers High-Density Rack Power Distribution Unit?rPDU?for Liquid-Cooled Data Centers Producing Area Distribution, Sales Area, Product Type

3.4.1 Key Manufacturers High-Density Rack Power Distribution Unit?rPDU?for Liquid-Cooled Data Centers Product Location Distribution

3.4.2 Players High-Density Rack Power Distribution Unit?rPDU?for Liquid-Cooled Data Centers 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 HIGH-DENSITY RACK POWER DISTRIBUTION UNIT?RPDU?FOR LIQUID-COOLED DATA CENTERS BY GEOGRAPHIC REGION

4.1 World Historic High-Density Rack Power Distribution Unit?rPDU?for Liquid-Cooled Data Centers Market Size by Geographic Region (2021-2026)

4.1.1 Global High-Density Rack Power Distribution Unit?rPDU?for Liquid-Cooled Data Centers Annual Sales by Geographic Region (2021-2026)

4.1.2 Global High-Density Rack Power Distribution Unit?rPDU?for Liquid-Cooled Data Centers Annual Revenue by Geographic Region (2021-2026)

4.2 World Historic High-Density Rack Power Distribution Unit?rPDU?for Liquid-Cooled Data Centers Market Size by Country/Region (2021-2026)

4.2.1 Global High-Density Rack Power Distribution Unit?rPDU?for Liquid-Cooled Data Centers Annual Sales by Country/Region (2021-2026)

4.2.2 Global High-Density Rack Power Distribution Unit?rPDU?for Liquid-Cooled Data Centers Annual Revenue by Country/Region (2021-2026)

4.3 Americas High-Density Rack Power Distribution Unit?rPDU?for Liquid-Cooled Data Centers Sales Growth

4.4 APAC High-Density Rack Power Distribution Unit?rPDU?for Liquid-Cooled Data Centers Sales Growth

4.5 Europe High-Density Rack Power Distribution Unit?rPDU?for Liquid-Cooled Data Centers Sales Growth

4.6 Middle East & Africa High-Density Rack Power Distribution Unit?rPDU?for Liquid-Cooled Data Centers Sales Growth

5 AMERICAS

5.1 Americas High-Density Rack Power Distribution Unit?rPDU?for Liquid-Cooled Data Centers Sales by Country

5.1.1 Americas High-Density Rack Power Distribution Unit?rPDU?for Liquid-Cooled Data Centers Sales by Country (2021-2026)

5.1.2 Americas High-Density Rack Power Distribution Unit?rPDU?for Liquid-Cooled Data Centers Revenue by Country (2021-2026)

5.2 Americas High-Density Rack Power Distribution Unit?rPDU?for Liquid-Cooled Data

Centers Sales by Product Function (2021-2026)

5.3 Americas High-Density Rack Power Distribution Unit?rPDU?for Liquid-Cooled Data

Centers Sales by Application (2021-2026)

5.4 United States

5.5 Canada

5.6 Mexico

5.7 Brazil

6 APAC

6.1 APAC High-Density Rack Power Distribution Unit?rPDU?for Liquid-Cooled Data

Centers Sales by Region

6.1.1 APAC High-Density Rack Power Distribution Unit?rPDU?for Liquid-Cooled Data

Centers Sales by Region (2021-2026)

6.1.2 APAC High-Density Rack Power Distribution Unit?rPDU?for Liquid-Cooled Data

Centers Revenue by Region (2021-2026)

6.2 APAC High-Density Rack Power Distribution Unit?rPDU?for Liquid-Cooled Data

Centers Sales by Product Function (2021-2026)

6.3 APAC High-Density Rack Power Distribution Unit?rPDU?for Liquid-Cooled Data

Centers 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 High-Density Rack Power Distribution Unit?rPDU?for Liquid-Cooled Data

Centers by Country

7.1.1 Europe High-Density Rack Power Distribution Unit?rPDU?for Liquid-Cooled Data

Centers Sales by Country (2021-2026)

7.1.2 Europe High-Density Rack Power Distribution Unit?rPDU?for Liquid-Cooled Data

Centers Revenue by Country (2021-2026)

7.2 Europe High-Density Rack Power Distribution Unit?rPDU?for Liquid-Cooled Data

Centers Sales by Product Function (2021-2026)

7.3 Europe High-Density Rack Power Distribution Unit?rPDU?for Liquid-Cooled Data

Centers 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 High-Density Rack Power Distribution Unit?rPDU?for Liquid-Cooled Data Centers by Country

8.1.1 Middle East & Africa High-Density Rack Power Distribution Unit?rPDU?for Liquid-Cooled Data Centers Sales by Country (2021-2026)

8.1.2 Middle East & Africa High-Density Rack Power Distribution Unit?rPDU?for Liquid-Cooled Data Centers Revenue by Country (2021-2026)

8.2 Middle East & Africa High-Density Rack Power Distribution Unit?rPDU?for Liquid-Cooled Data Centers Sales by Product Function (2021-2026)

8.3 Middle East & Africa High-Density Rack Power Distribution Unit?rPDU?for Liquid-Cooled Data Centers 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 High-Density Rack Power Distribution Unit?rPDU?for Liquid-Cooled Data Centers

10.3 Manufacturing Process Analysis of High-Density Rack Power Distribution Unit?rPDU?for Liquid-Cooled Data Centers

10.4 Industry Chain Structure of High-Density Rack Power Distribution Unit?rPDU?for

Liquid-Cooled Data Centers

11 MARKETING, DISTRIBUTORS AND CUSTOMER

11.1 Sales Channel

11.1.1 Direct Channels

11.1.2 Indirect Channels

11.2 High-Density Rack Power Distribution Unit?rPDU?for Liquid-Cooled Data Centers Distributors

11.3 High-Density Rack Power Distribution Unit?rPDU?for Liquid-Cooled Data Centers Customer

12 WORLD FORECAST REVIEW FOR HIGH-DENSITY RACK POWER DISTRIBUTION UNIT?RPDU?FOR LIQUID-COOLED DATA CENTERS BY GEOGRAPHIC REGION

12.1 Global High-Density Rack Power Distribution Unit?rPDU?for Liquid-Cooled Data Centers Market Size Forecast by Region

12.1.1 Global High-Density Rack Power Distribution Unit?rPDU?for Liquid-Cooled Data Centers Forecast by Region (2027-2032)

12.1.2 Global High-Density Rack Power Distribution Unit?rPDU?for Liquid-Cooled Data Centers 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 High-Density Rack Power Distribution Unit?rPDU?for Liquid-Cooled Data Centers Forecast by Product Function (2027-2032)

12.7 Global High-Density Rack Power Distribution Unit?rPDU?for Liquid-Cooled Data Centers Forecast by Application (2027-2032)

13 KEY PLAYERS ANALYSIS

13.1 Legrand

13.1.1 Legrand Company Information

13.1.2 Legrand High-Density Rack Power Distribution Unit?rPDU?for Liquid-Cooled Data Centers Product Portfolios and Specifications

13.1.3 Legrand High-Density Rack Power Distribution Unit?rPDU?for Liquid-Cooled Data Centers Sales, Revenue, Price and Gross Margin (2021-2026)

- 13.1.4 Legrand Main Business Overview
- 13.1.5 Legrand Latest Developments
- 13.2 Schneider Electric
 - 13.2.1 Schneider Electric Company Information
 - 13.2.2 Schneider Electric High-Density Rack Power Distribution Unit?rPDU?for Liquid-Cooled Data Centers Product Portfolios and Specifications
 - 13.2.3 Schneider Electric High-Density Rack Power Distribution Unit?rPDU?for Liquid-Cooled Data Centers Sales, Revenue, Price and Gross Margin (2021-2026)
 - 13.2.4 Schneider Electric Main Business Overview
 - 13.2.5 Schneider Electric Latest Developments
- 13.3 Vertiv
 - 13.3.1 Vertiv Company Information
 - 13.3.2 Vertiv High-Density Rack Power Distribution Unit?rPDU?for Liquid-Cooled Data Centers Product Portfolios and Specifications
 - 13.3.3 Vertiv High-Density Rack Power Distribution Unit?rPDU?for Liquid-Cooled Data Centers Sales, Revenue, Price and Gross Margin (2021-2026)
 - 13.3.4 Vertiv Main Business Overview
 - 13.3.5 Vertiv Latest Developments
- 13.4 Eaton
 - 13.4.1 Eaton Company Information
 - 13.4.2 Eaton High-Density Rack Power Distribution Unit?rPDU?for Liquid-Cooled Data Centers Product Portfolios and Specifications
 - 13.4.3 Eaton High-Density Rack Power Distribution Unit?rPDU?for Liquid-Cooled Data Centers Sales, Revenue, Price and Gross Margin (2021-2026)
 - 13.4.4 Eaton Main Business Overview
 - 13.4.5 Eaton Latest Developments
- 13.5 Panduit
 - 13.5.1 Panduit Company Information
 - 13.5.2 Panduit High-Density Rack Power Distribution Unit?rPDU?for Liquid-Cooled Data Centers Product Portfolios and Specifications
 - 13.5.3 Panduit High-Density Rack Power Distribution Unit?rPDU?for Liquid-Cooled Data Centers Sales, Revenue, Price and Gross Margin (2021-2026)
 - 13.5.4 Panduit Main Business Overview
 - 13.5.5 Panduit Latest Developments
- 13.6 nVent Electric
 - 13.6.1 nVent Electric Company Information
 - 13.6.2 nVent Electric High-Density Rack Power Distribution Unit?rPDU?for Liquid-Cooled Data Centers Product Portfolios and Specifications
 - 13.6.3 nVent Electric High-Density Rack Power Distribution Unit?rPDU?for Liquid-

Cooled Data Centers Sales, Revenue, Price and Gross Margin (2021-2026)

13.6.4 nVent Electric Main Business Overview

13.6.5 nVent Electric Latest Developments

13.7 Chatsworth Products

13.7.1 Chatsworth Products Company Information

13.7.2 Chatsworth Products High-Density Rack Power Distribution Unit?rPDU?for Liquid-Cooled Data Centers Product Portfolios and Specifications

13.7.3 Chatsworth Products High-Density Rack Power Distribution Unit?rPDU?for Liquid-Cooled Data Centers Sales, Revenue, Price and Gross Margin (2021-2026)

13.7.4 Chatsworth Products Main Business Overview

13.7.5 Chatsworth Products Latest Developments

13.8 Rittal

13.8.1 Rittal Company Information

13.8.2 Rittal High-Density Rack Power Distribution Unit?rPDU?for Liquid-Cooled Data Centers Product Portfolios and Specifications

13.8.3 Rittal High-Density Rack Power Distribution Unit?rPDU?for Liquid-Cooled Data Centers Sales, Revenue, Price and Gross Margin (2021-2026)

13.8.4 Rittal Main Business Overview

13.8.5 Rittal Latest Developments

13.9 Bachmann Group

13.9.1 Bachmann Group Company Information

13.9.2 Bachmann Group High-Density Rack Power Distribution Unit?rPDU?for Liquid-Cooled Data Centers Product Portfolios and Specifications

13.9.3 Bachmann Group High-Density Rack Power Distribution Unit?rPDU?for Liquid-Cooled Data Centers Sales, Revenue, Price and Gross Margin (2021-2026)

13.9.4 Bachmann Group Main Business Overview

13.9.5 Bachmann Group Latest Developments

13.10 Schleifenbauer Products B.V.

13.10.1 Schleifenbauer Products B.V. Company Information

13.10.2 Schleifenbauer Products B.V. High-Density Rack Power Distribution Unit?rPDU?for Liquid-Cooled Data Centers Product Portfolios and Specifications

13.10.3 Schleifenbauer Products B.V. High-Density Rack Power Distribution Unit?rPDU?for Liquid-Cooled Data Centers Sales, Revenue, Price and Gross Margin (2021-2026)

13.10.4 Schleifenbauer Products B.V. Main Business Overview

13.10.5 Schleifenbauer Products B.V. Latest Developments

13.11 Socomec

13.11.1 Socomec Company Information

13.11.2 Socomec High-Density Rack Power Distribution Unit?rPDU?for Liquid-Cooled

Data Centers Product Portfolios and Specifications

13.11.3 Socomec High-Density Rack Power Distribution Unit?rPDU?for Liquid-Cooled Data Centers Sales, Revenue, Price and Gross Margin (2021-2026)

13.11.4 Socomec Main Business Overview

13.11.5 Socomec Latest Developments

13.12 Delta Electronics

13.12.1 Delta Electronics Company Information

13.12.2 Delta Electronics High-Density Rack Power Distribution Unit?rPDU?for Liquid-Cooled Data Centers Product Portfolios and Specifications

13.12.3 Delta Electronics High-Density Rack Power Distribution Unit?rPDU?for Liquid-Cooled Data Centers Sales, Revenue, Price and Gross Margin (2021-2026)

13.12.4 Delta Electronics Main Business Overview

13.12.5 Delta Electronics Latest Developments

13.13 ATEN International

13.13.1 ATEN International Company Information

13.13.2 ATEN International High-Density Rack Power Distribution Unit?rPDU?for Liquid-Cooled Data Centers Product Portfolios and Specifications

13.13.3 ATEN International High-Density Rack Power Distribution Unit?rPDU?for Liquid-Cooled Data Centers Sales, Revenue, Price and Gross Margin (2021-2026)

13.13.4 ATEN International Main Business Overview

13.13.5 ATEN International Latest Developments

13.14 CyberPower Systems

13.14.1 CyberPower Systems Company Information

13.14.2 CyberPower Systems High-Density Rack Power Distribution Unit?rPDU?for Liquid-Cooled Data Centers Product Portfolios and Specifications

13.14.3 CyberPower Systems High-Density Rack Power Distribution Unit?rPDU?for Liquid-Cooled Data Centers Sales, Revenue, Price and Gross Margin (2021-2026)

13.14.4 CyberPower Systems Main Business Overview

13.14.5 CyberPower Systems Latest Developments

13.15 Austin Hughes

13.15.1 Austin Hughes Company Information

13.15.2 Austin Hughes High-Density Rack Power Distribution Unit?rPDU?for Liquid-Cooled Data Centers Product Portfolios and Specifications

13.15.3 Austin Hughes High-Density Rack Power Distribution Unit?rPDU?for Liquid-Cooled Data Centers Sales, Revenue, Price and Gross Margin (2021-2026)

13.15.4 Austin Hughes Main Business Overview

13.15.5 Austin Hughes Latest Developments

13.16 Ahoku Electronic

13.16.1 Ahoku Electronic Company Information

13.16.2 Ahoku Electronic High-Density Rack Power Distribution Unit?rPDU?for Liquid-Cooled Data Centers Product Portfolios and Specifications

13.16.3 Ahoku Electronic High-Density Rack Power Distribution Unit?rPDU?for Liquid-Cooled Data Centers Sales, Revenue, Price and Gross Margin (2021-2026)

13.16.4 Ahoku Electronic Main Business Overview

13.16.5 Ahoku Electronic Latest Developments

13.17 Shenzhen Clever Electronic

13.17.1 Shenzhen Clever Electronic Company Information

13.17.2 Shenzhen Clever Electronic High-Density Rack Power Distribution Unit?rPDU?for Liquid-Cooled Data Centers Product Portfolios and Specifications

13.17.3 Shenzhen Clever Electronic High-Density Rack Power Distribution Unit?rPDU?for Liquid-Cooled Data Centers Sales, Revenue, Price and Gross Margin (2021-2026)

13.17.4 Shenzhen Clever Electronic Main Business Overview

13.17.5 Shenzhen Clever Electronic Latest Developments

13.18 Sanwa Supply

13.18.1 Sanwa Supply Company Information

13.18.2 Sanwa Supply High-Density Rack Power Distribution Unit?rPDU?for Liquid-Cooled Data Centers Product Portfolios and Specifications

13.18.3 Sanwa Supply High-Density Rack Power Distribution Unit?rPDU?for Liquid-Cooled Data Centers Sales, Revenue, Price and Gross Margin (2021-2026)

13.18.4 Sanwa Supply Main Business Overview

13.18.5 Sanwa Supply Latest Developments

13.19 GUDE Systems

13.19.1 GUDE Systems Company Information

13.19.2 GUDE Systems High-Density Rack Power Distribution Unit?rPDU?for Liquid-Cooled Data Centers Product Portfolios and Specifications

13.19.3 GUDE Systems High-Density Rack Power Distribution Unit?rPDU?for Liquid-Cooled Data Centers Sales, Revenue, Price and Gross Margin (2021-2026)

13.19.4 GUDE Systems Main Business Overview

13.19.5 GUDE Systems Latest Developments

13.20 DaTangBG

13.20.1 DaTangBG Company Information

13.20.2 DaTangBG High-Density Rack Power Distribution Unit?rPDU?for Liquid-Cooled Data Centers Product Portfolios and Specifications

13.20.3 DaTangBG High-Density Rack Power Distribution Unit?rPDU?for Liquid-Cooled Data Centers Sales, Revenue, Price and Gross Margin (2021-2026)

13.20.4 DaTangBG Main Business Overview

13.20.5 DaTangBG Latest Developments

14 RESEARCH FINDINGS AND CONCLUSION

List Of Tables

LIST OF TABLES

Table 1. High-Density Rack Power Distribution Unit?rPDU?for Liquid-Cooled Data Centers Annual Sales CAGR by Geographic Region (2021, 2025 & 2032) & (\$ millions)

Table 2. High-Density Rack Power Distribution Unit?rPDU?for Liquid-Cooled Data Centers Annual Sales CAGR by Country/Region (2021, 2025 & 2032) & (\$ millions)

Table 3. Major Players of Basic Rack PDU

Table 4. Major Players of Metered / Monitored Rack PDU

Table 5. Major Players of Switched / Managed Rack PDU

Table 6. Major Players of Transfer / Redundant Rack PDU

Table 7. Major Players of Other

Table 8. Global High-Density Rack Power Distribution Unit?rPDU?for Liquid-Cooled Data Centers Sales by Product Function (2021-2026) & (Units)

Table 9. Global High-Density Rack Power Distribution Unit?rPDU?for Liquid-Cooled Data Centers Sales Market Share by Product Function (2021-2026)

Table 10. Global High-Density Rack Power Distribution Unit?rPDU?for Liquid-Cooled Data Centers Revenue by Product Function (2021-2026) & (\$ million)

Table 11. Global High-Density Rack Power Distribution Unit?rPDU?for Liquid-Cooled Data Centers Revenue Market Share by Product Function (2021-2026)

Table 12. Global High-Density Rack Power Distribution Unit?rPDU?for Liquid-Cooled Data Centers Sale Price by Product Function (2021-2026) & (US\$/Unit)

Table 13. Major Players of Standard Power Rack PDU

Table 14. Major Players of High-Power Rack PDU

Table 15. Major Players of Ultra-High-Power Rack PDU

Table 16. Major Players of Other

Table 17. Global High-Density Rack Power Distribution Unit?rPDU?for Liquid-Cooled Data Centers Sales by Power Rating (2021-2026) & (Units)

Table 18. Global High-Density Rack Power Distribution Unit?rPDU?for Liquid-Cooled Data Centers Sales Market Share by Power Rating (2021-2026)

Table 19. Global High-Density Rack Power Distribution Unit?rPDU?for Liquid-Cooled Data Centers Revenue by Power Rating (2021-2026) & (\$ million)

Table 20. Global High-Density Rack Power Distribution Unit?rPDU?for Liquid-Cooled Data Centers Revenue Market Share by Power Rating (2021-2026)

Table 21. Global High-Density Rack Power Distribution Unit?rPDU?for Liquid-Cooled Data Centers Sale Price by Power Rating (2021-2026) & (US\$/Unit)

Table 22. Major Players of Vertical 0U Rack PDU

Table 23. Major Players of Horizontal 1U Rack PDU

Table 24. Major Players of Multi-U / High-Capacity PDU
Table 25. Major Players of Custom Rack-Integrated PDU
Table 26. Global High-Density Rack Power Distribution Unit?rPDU?for Liquid-Cooled Data Centers Sales by Mounting Form Factor (2021-2026) & (Units)
Table 27. Global High-Density Rack Power Distribution Unit?rPDU?for Liquid-Cooled Data Centers Sales Market Share by Mounting Form Factor (2021-2026)
Table 28. Global High-Density Rack Power Distribution Unit?rPDU?for Liquid-Cooled Data Centers Revenue by Mounting Form Factor (2021-2026) & (\$ million)
Table 29. Global High-Density Rack Power Distribution Unit?rPDU?for Liquid-Cooled Data Centers Revenue Market Share by Mounting Form Factor (2021-2026)
Table 30. Global High-Density Rack Power Distribution Unit?rPDU?for Liquid-Cooled Data Centers Sale Price by Mounting Form Factor (2021-2026) & (US\$/Unit)
Table 31. Major Players of Single-Phase AC PDU
Table 32. Major Players of Three-Phase AC PDU
Table 33. Major Players of High-Voltage AC PDU
Table 34. Major Players of Other
Table 35. Global High-Density Rack Power Distribution Unit?rPDU?for Liquid-Cooled Data Centers Sales by Electrical Input (2021-2026) & (Units)
Table 36. Global High-Density Rack Power Distribution Unit?rPDU?for Liquid-Cooled Data Centers Sales Market Share by Electrical Input (2021-2026)
Table 37. Global High-Density Rack Power Distribution Unit?rPDU?for Liquid-Cooled Data Centers Revenue by Electrical Input (2021-2026) & (\$ million)
Table 38. Global High-Density Rack Power Distribution Unit?rPDU?for Liquid-Cooled Data Centers Revenue Market Share by Electrical Input (2021-2026)
Table 39. Global High-Density Rack Power Distribution Unit?rPDU?for Liquid-Cooled Data Centers Sale Price by Electrical Input (2021-2026) & (US\$/Unit)
Table 40. Global High-Density Rack Power Distribution Unit?rPDU?for Liquid-Cooled Data Centers Sale by Application (2021-2026) & (Units)
Table 41. Global High-Density Rack Power Distribution Unit?rPDU?for Liquid-Cooled Data Centers Sale Market Share by Application (2021-2026)
Table 42. Global High-Density Rack Power Distribution Unit?rPDU?for Liquid-Cooled Data Centers Revenue by Application (2021-2026) & (\$ million)
Table 43. Global High-Density Rack Power Distribution Unit?rPDU?for Liquid-Cooled Data Centers Revenue Market Share by Application (2021-2026)
Table 44. Global High-Density Rack Power Distribution Unit?rPDU?for Liquid-Cooled Data Centers Sale Price by Application (2021-2026) & (US\$/Unit)
Table 45. Global High-Density Rack Power Distribution Unit?rPDU?for Liquid-Cooled Data Centers Sales by Company (2021-2026) & (Units)
Table 46. Global High-Density Rack Power Distribution Unit?rPDU?for Liquid-Cooled

Data Centers Sales Market Share by Company (2021-2026)

Table 47. Global High-Density Rack Power Distribution Unit?rPDU?for Liquid-Cooled Data Centers Revenue by Company (2021-2026) & (\$ millions)

Table 48. Global High-Density Rack Power Distribution Unit?rPDU?for Liquid-Cooled Data Centers Revenue Market Share by Company (2021-2026)

Table 49. Global High-Density Rack Power Distribution Unit?rPDU?for Liquid-Cooled Data Centers Sale Price by Company (2021-2026) & (US\$/Unit)

Table 50. Key Manufacturers High-Density Rack Power Distribution Unit?rPDU?for Liquid-Cooled Data Centers Producing Area Distribution and Sales Area

Table 51. Players High-Density Rack Power Distribution Unit?rPDU?for Liquid-Cooled Data Centers Products Offered

Table 52. High-Density Rack Power Distribution Unit?rPDU?for Liquid-Cooled Data Centers Concentration Ratio (CR3, CR5 and CR10) & (2024-2026)

Table 53. New Products and Potential Entrants

Table 54. Market M&A Activity & Strategy

Table 55. Global High-Density Rack Power Distribution Unit?rPDU?for Liquid-Cooled Data Centers Sales by Geographic Region (2021-2026) & (Units)

Table 56. Global High-Density Rack Power Distribution Unit?rPDU?for Liquid-Cooled Data Centers Sales Market Share Geographic Region (2021-2026)

Table 57. Global High-Density Rack Power Distribution Unit?rPDU?for Liquid-Cooled Data Centers Revenue by Geographic Region (2021-2026) & (\$ millions)

Table 58. Global High-Density Rack Power Distribution Unit?rPDU?for Liquid-Cooled Data Centers Revenue Market Share by Geographic Region (2021-2026)

Table 59. Global High-Density Rack Power Distribution Unit?rPDU?for Liquid-Cooled Data Centers Sales by Country/Region (2021-2026) & (Units)

Table 60. Global High-Density Rack Power Distribution Unit?rPDU?for Liquid-Cooled Data Centers Sales Market Share by Country/Region (2021-2026)

Table 61. Global High-Density Rack Power Distribution Unit?rPDU?for Liquid-Cooled Data Centers Revenue by Country/Region (2021-2026) & (\$ millions)

Table 62. Global High-Density Rack Power Distribution Unit?rPDU?for Liquid-Cooled Data Centers Revenue Market Share by Country/Region (2021-2026)

Table 63. Americas High-Density Rack Power Distribution Unit?rPDU?for Liquid-Cooled Data Centers Sales by Country (2021-2026) & (Units)

Table 64. Americas High-Density Rack Power Distribution Unit?rPDU?for Liquid-Cooled Data Centers Sales Market Share by Country (2021-2026)

Table 65. Americas High-Density Rack Power Distribution Unit?rPDU?for Liquid-Cooled Data Centers Revenue by Country (2021-2026) & (\$ millions)

Table 66. Americas High-Density Rack Power Distribution Unit?rPDU?for Liquid-Cooled Data Centers Sales by Product Function (2021-2026) & (Units)

Table 67. Americas High-Density Rack Power Distribution Unit?rPDU?for Liquid-Cooled Data Centers Sales by Application (2021-2026) & (Units)

Table 68. APAC High-Density Rack Power Distribution Unit?rPDU?for Liquid-Cooled Data Centers Sales by Region (2021-2026) & (Units)

Table 69. APAC High-Density Rack Power Distribution Unit?rPDU?for Liquid-Cooled Data Centers Sales Market Share by Region (2021-2026)

Table 70. APAC High-Density Rack Power Distribution Unit?rPDU?for Liquid-Cooled Data Centers Revenue by Region (2021-2026) & (\$ millions)

Table 71. APAC High-Density Rack Power Distribution Unit?rPDU?for Liquid-Cooled Data Centers Sales by Product Function (2021-2026) & (Units)

Table 72. APAC High-Density Rack Power Distribution Unit?rPDU?for Liquid-Cooled Data Centers Sales by Application (2021-2026) & (Units)

Table 73. Europe High-Density Rack Power Distribution Unit?rPDU?for Liquid-Cooled Data Centers Sales by Country (2021-2026) & (Units)

Table 74. Europe High-Density Rack Power Distribution Unit?rPDU?for Liquid-Cooled Data Centers Revenue by Country (2021-2026) & (\$ millions)

Table 75. Europe High-Density Rack Power Distribution Unit?rPDU?for Liquid-Cooled Data Centers Sales by Product Function (2021-2026) & (Units)

Table 76. Europe High-Density Rack Power Distribution Unit?rPDU?for Liquid-Cooled Data Centers Sales by Application (2021-2026) & (Units)

Table 77. Middle East & Africa High-Density Rack Power Distribution Unit?rPDU?for Liquid-Cooled Data Centers Sales by Country (2021-2026) & (Units)

Table 78. Middle East & Africa High-Density Rack Power Distribution Unit?rPDU?for Liquid-Cooled Data Centers Revenue Market Share by Country (2021-2026)

Table 79. Middle East & Africa High-Density Rack Power Distribution Unit?rPDU?for Liquid-Cooled Data Centers Sales by Product Function (2021-2026) & (Units)

Table 80. Middle East & Africa High-Density Rack Power Distribution Unit?rPDU?for Liquid-Cooled Data Centers Sales by Application (2021-2026) & (Units)

Table 81. Key Market Drivers & Growth Opportunities of High-Density Rack Power Distribution Unit?rPDU?for Liquid-Cooled Data Centers

Table 82. Key Market Challenges & Risks of High-Density Rack Power Distribution Unit?rPDU?for Liquid-Cooled Data Centers

Table 83. Key Industry Trends of High-Density Rack Power Distribution Unit?rPDU?for Liquid-Cooled Data Centers

Table 84. High-Density Rack Power Distribution Unit?rPDU?for Liquid-Cooled Data Centers Raw Material

Table 85. Key Suppliers of Raw Materials

Table 86. High-Density Rack Power Distribution Unit?rPDU?for Liquid-Cooled Data Centers Distributors List

Table 87. High-Density Rack Power Distribution Unit?rPDU?for Liquid-Cooled Data Centers Customer List

Table 88. Global High-Density Rack Power Distribution Unit?rPDU?for Liquid-Cooled Data Centers Sales Forecast by Region (2027-2032) & (Units)

Table 89. Global High-Density Rack Power Distribution Unit?rPDU?for Liquid-Cooled Data Centers Revenue Forecast by Region (2027-2032) & (\$ millions)

Table 90. Americas High-Density Rack Power Distribution Unit?rPDU?for Liquid-Cooled Data Centers Sales Forecast by Country (2027-2032) & (Units)

Table 91. Americas High-Density Rack Power Distribution Unit?rPDU?for Liquid-Cooled Data Centers Annual Revenue Forecast by Country (2027-2032) & (\$ millions)

Table 92. APAC High-Density Rack Power Distribution Unit?rPDU?for Liquid-Cooled Data Centers Sales Forecast by Region (2027-2032) & (Units)

Table 93. APAC High-Density Rack Power Distribution Unit?rPDU?for Liquid-Cooled Data Centers Annual Revenue Forecast by Region (2027-2032) & (\$ millions)

Table 94. Europe High-Density Rack Power Distribution Unit?rPDU?for Liquid-Cooled Data Centers Sales Forecast by Country (2027-2032) & (Units)

Table 95. Europe High-Density Rack Power Distribution Unit?rPDU?for Liquid-Cooled Data Centers Revenue Forecast by Country (2027-2032) & (\$ millions)

Table 96. Middle East & Africa High-Density Rack Power Distribution Unit?rPDU?for Liquid-Cooled Data Centers Sales Forecast by Country (2027-2032) & (Units)

Table 97. Middle East & Africa High-Density Rack Power Distribution Unit?rPDU?for Liquid-Cooled Data Centers Revenue Forecast by Country (2027-2032) & (\$ millions)

Table 98. Global High-Density Rack Power Distribution Unit?rPDU?for Liquid-Cooled Data Centers Sales Forecast by Product Function (2027-2032) & (Units)

Table 99. Global High-Density Rack Power Distribution Unit?rPDU?for Liquid-Cooled Data Centers Revenue Forecast by Product Function (2027-2032) & (\$ millions)

Table 100. Global High-Density Rack Power Distribution Unit?rPDU?for Liquid-Cooled Data Centers Sales Forecast by Application (2027-2032) & (Units)

Table 101. Global High-Density Rack Power Distribution Unit?rPDU?for Liquid-Cooled Data Centers Revenue Forecast by Application (2027-2032) & (\$ millions)

Table 102. Legrand Basic Information, High-Density Rack Power Distribution Unit?rPDU?for Liquid-Cooled Data Centers Manufacturing Base, Sales Area and Its Competitors

Table 103. Legrand High-Density Rack Power Distribution Unit?rPDU?for Liquid-Cooled Data Centers Product Portfolios and Specifications

Table 104. Legrand High-Density Rack Power Distribution Unit?rPDU?for Liquid-Cooled Data Centers Sales (Units), Revenue (\$ Million), Price (US\$/Unit) and Gross Margin (2021-2026)

Table 105. Legrand Main Business

Table 106. Legrand Latest Developments

Table 107. Schneider Electric Basic Information, High-Density Rack Power Distribution Unit?rPDU?for Liquid-Cooled Data Centers Manufacturing Base, Sales Area and Its Competitors

Table 108. Schneider Electric High-Density Rack Power Distribution Unit?rPDU?for Liquid-Cooled Data Centers Product Portfolios and Specifications

Table 109. Schneider Electric High-Density Rack Power Distribution Unit?rPDU?for Liquid-Cooled Data Centers Sales (Units), Revenue (\$ Million), Price (US\$/Unit) and Gross Margin (2021-2026)

Table 110. Schneider Electric Main Business

Table 111. Schneider Electric Latest Developments

Table 112. Vertiv Basic Information, High-Density Rack Power Distribution Unit?rPDU?for Liquid-Cooled Data Centers Manufacturing Base, Sales Area and Its Competitors

Table 113. Vertiv High-Density Rack Power Distribution Unit?rPDU?for Liquid-Cooled Data Centers Product Portfolios and Specifications

Table 114. Vertiv High-Density Rack Power Distribution Unit?rPDU?for Liquid-Cooled Data Centers Sales (Units), Revenue (\$ Million), Price (US\$/Unit) and Gross Margin (2021-2026)

Table 115. Vertiv Main Business

Table 116. Vertiv Latest Developments

Table 117. Eaton Basic Information, High-Density Rack Power Distribution Unit?rPDU?for Liquid-Cooled Data Centers Manufacturing Base, Sales Area and Its Competitors

Table 118. Eaton High-Density Rack Power Distribution Unit?rPDU?for Liquid-Cooled Data Centers Product Portfolios and Specifications

Table 119. Eaton High-Density Rack Power Distribution Unit?rPDU?for Liquid-Cooled Data Centers Sales (Units), Revenue (\$ Million), Price (US\$/Unit) and Gross Margin (2021-2026)

Table 120. Eaton Main Business

Table 121. Eaton Latest Developments

Table 122. Panduit Basic Information, High-Density Rack Power Distribution Unit?rPDU?for Liquid-Cooled Data Centers Manufacturing Base, Sales Area and Its Competitors

Table 123. Panduit High-Density Rack Power Distribution Unit?rPDU?for Liquid-Cooled Data Centers Product Portfolios and Specifications

Table 124. Panduit High-Density Rack Power Distribution Unit?rPDU?for Liquid-Cooled Data Centers Sales (Units), Revenue (\$ Million), Price (US\$/Unit) and Gross Margin (2021-2026)

Table 125. Panduit Main Business

Table 126. Panduit Latest Developments

Table 127. nVent Electric Basic Information, High-Density Rack Power Distribution Unit?rPDU?for Liquid-Cooled Data Centers Manufacturing Base, Sales Area and Its Competitors

Table 128. nVent Electric High-Density Rack Power Distribution Unit?rPDU?for Liquid-Cooled Data Centers Product Portfolios and Specifications

Table 129. nVent Electric High-Density Rack Power Distribution Unit?rPDU?for Liquid-Cooled Data Centers Sales (Units), Revenue (\$ Million), Price (US\$/Unit) and Gross Margin (2021-2026)

Table 130. nVent Electric Main Business

Table 131. nVent Electric Latest Developments

Table 132. Chatsworth Products Basic Information, High-Density Rack Power Distribution Unit?rPDU?for Liquid-Cooled Data Centers Manufacturing Base, Sales Area and Its Competitors

Table 133. Chatsworth Products High-Density Rack Power Distribution Unit?rPDU?for Liquid-Cooled Data Centers Product Portfolios and Specifications

Table 134. Chatsworth Products High-Density Rack Power Distribution Unit?rPDU?for Liquid-Cooled Data Centers Sales (Units), Revenue (\$ Million), Price (US\$/Unit) and Gross Margin (2021-2026)

Table 135. Chatsworth Products Main Business

Table 136. Chatsworth Products Latest Developments

Table 137. Rittal Basic Information, High-Density Rack Power Distribution Unit?rPDU?for Liquid-Cooled Data Centers Manufacturing Base, Sales Area and Its Competitors

Table 138. Rittal High-Density Rack Power Distribution Unit?rPDU?for Liquid-Cooled Data Centers Product Portfolios and Specifications

Table 139. Rittal High-Density Rack Power Distribution Unit?rPDU?for Liquid-Cooled Data Centers Sales (Units), Revenue (\$ Million), Price (US\$/Unit) and Gross Margin (2021-2026)

Table 140. Rittal Main Business

Table 141. Rittal Latest Developments

Table 142. Bachmann Group Basic Information, High-Density Rack Power Distribution Unit?rPDU?for Liquid-Cooled Data Centers Manufacturing Base, Sales Area and Its Competitors

Table 143. Bachmann Group High-Density Rack Power Distribution Unit?rPDU?for Liquid-Cooled Data Centers Product Portfolios and Specifications

Table 144. Bachmann Group High-Density Rack Power Distribution Unit?rPDU?for Liquid-Cooled Data Centers Sales (Units), Revenue (\$ Million), Price (US\$/Unit) and

Gross Margin (2021-2026)

Table 145. Bachmann Group Main Business

Table 146. Bachmann Group Latest Developments

Table 147. Schleifenbauer Products B.V. Basic Information, High-Density Rack Power Distribution Unit?rPDU?for Liquid-Cooled Data Centers Manufacturing Base, Sales Area and Its Competitors

Table 148. Schleifenbauer Products B.V. High-Density Rack Power Distribution Unit?rPDU?for Liquid-Cooled Data Centers Product Portfolios and Specifications

Table 149. Schleifenbauer Products B.V. High-Density Rack Power Distribution Unit?rPDU?for Liquid-Cooled Data Centers Sales (Units), Revenue (\$ Million), Price (US\$/Unit) and Gross Margin (2021-2026)

Table 150. Schleifenbauer Products B.V. Main Business

Table 151. Schleifenbauer Products B.V. Latest Developments

Table 152. Socomec Basic Information, High-Density Rack Power Distribution Unit?rPDU?for Liquid-Cooled Data Centers Manufacturing Base, Sales Area and Its Competitors

Table 153. Socomec High-Density Rack Power Distribution Unit?rPDU?for Liquid-Cooled Data Centers Product Portfolios and Specifications

Table 154. Socomec High-Density Rack Power Distribution Unit?rPDU?for Liquid-Cooled Data Centers Sales (Units), Revenue (\$ Million), Price (US\$/Unit) and Gross Margin (2021-2026)

Table 155. Socomec Main Business

Table 156. Socomec Latest Developments

Table 157. Delta Electronics Basic Information, High-Density Rack Power Distribution Unit?rPDU?for Liquid-Cooled Data Centers Manufacturing Base, Sales Area and Its Competitors

Table 158. Delta Electronics High-Density Rack Power Distribution Unit?rPDU?for Liquid-Cooled Data Centers Product Portfolios and Specifications

Table 159. Delta Electronics High-Density Rack Power Distribution Unit?rPDU?for Liquid-Cooled Data Centers Sales (Units), Revenue (\$ Million), Price (US\$/Unit) and Gross Margin (2021-2026)

Table 160. Delta Electronics Main Business

Table 161. Delta Electronics Latest Developments

Table 162. ATEN International Basic Information, High-Density Rack Power Distribution Unit?rPDU?for Liquid-Cooled Data Centers Manufacturing Base, Sales Area and Its Competitors

Table 163. ATEN International High-Density Rack Power Distribution Unit?rPDU?for Liquid-Cooled Data Centers Product Portfolios and Specifications

Table 164. ATEN International High-Density Rack Power Distribution Unit?rPDU?for

Liquid-Cooled Data Centers Sales (Units), Revenue (\$ Million), Price (US\$/Unit) and Gross Margin (2021-2026)

Table 165. ATEN International Main Business

Table 166. ATEN International Latest Developments

Table 167. CyberPower Systems Basic Information, High-Density Rack Power Distribution Unit?rPDU?for Liquid-Cooled Data Centers Manufacturing Base, Sales Area and Its Competitors

Table 168. CyberPower Systems High-Density Rack Power Distribution Unit?rPDU?for Liquid-Cooled Data Centers Product Portfolios and Specifications

Table 169. CyberPower Systems High-Density Rack Power Distribution Unit?rPDU?for Liquid-Cooled Data Centers Sales (Units), Revenue (\$ Million), Price (US\$/Unit) and Gross Margin (2021-2026)

Table 170. CyberPower Systems Main Business

Table 171. CyberPower Systems Latest Developments

Table 172. Austin Hughes Basic Information, High-Density Rack Power Distribution Unit?rPDU?for Liquid-Cooled Data Centers Manufacturing Base, Sales Area and Its Competitors

Table 173. Austin Hughes High-Density Rack Power Distribution Unit?rPDU?for Liquid-Cooled Data Centers Product Portfolios and Specifications

Table 174. Austin Hughes High-Density Rack Power Distribution Unit?rPDU?for Liquid-Cooled Data Centers Sales (Units), Revenue (\$ Million), Price (US\$/Unit) and Gross Margin (2021-2026)

Table 175. Austin Hughes Main Business

Table 176. Austin Hughes Latest Developments

Table 177. Ahoku Electronic Basic Information, High-Density Rack Power Distribution Unit?rPDU?for Liquid-Cooled Data Centers Manufacturing Base, Sales Area and Its Competitors

Table 178. Ahoku Electronic High-Density Rack Power Distribution Unit?rPDU?for Liquid-Cooled Data Centers Product Portfolios and Specifications

Table 179. Ahoku Electronic High-Density Rack Power Distribution Unit?rPDU?for Liquid-Cooled Data Centers Sales (Units), Revenue (\$ Million), Price (US\$/Unit) and Gross Margin (2021-2026)

Table 180. Ahoku Electronic Main Business

Table 181. Ahoku Electronic Latest Developments

Table 182. Shenzhen Clever Electronic Basic Information, High-Density Rack Power Distribution Unit?rPDU?for Liquid-Cooled Data Centers Manufacturing Base, Sales Area and Its Competitors

Table 183. Shenzhen Clever Electronic High-Density Rack Power Distribution Unit?rPDU?for Liquid-Cooled Data Centers Product Portfolios and Specifications

Table 184. Shenzhen Clever Electronic High-Density Rack Power Distribution Unit?rPDU?for Liquid-Cooled Data Centers Sales (Units), Revenue (\$ Million), Price (US\$/Unit) and Gross Margin (2021-2026)

Table 185. Shenzhen Clever Electronic Main Business

Table 186. Shenzhen Clever Electronic Latest Developments

Table 187. Sanwa Supply Basic Information, High-Density Rack Power Distribution Unit?rPDU?for Liquid-Cooled Data Centers Manufacturing Base, Sales Area and Its Competitors

Table 188. Sanwa Supply High-Density Rack Power Distribution Unit?rPDU?for Liquid-Cooled Data Centers Product Portfolios and Specifications

Table 189. Sanwa Supply High-Density Rack Power Distribution Unit?rPDU?for Liquid-Cooled Data Centers Sales (Units), Revenue (\$ Million), Price (US\$/Unit) and Gross Margin (2021-2026)

Table 190. Sanwa Supply Main Business

Table 191. Sanwa Supply Latest Developments

Table 192. GUDE Systems Basic Information, High-Density Rack Power Distribution Unit?rPDU?for Liquid-Cooled Data Centers Manufacturing Base, Sales Area and Its Competitors

Table 193. GUDE Systems High-Density Rack Power Distribution Unit?rPDU?for Liquid-Cooled Data Centers Product Portfolios and Specifications

Table 194. GUDE Systems High-Density Rack Power Distribution Unit?rPDU?for Liquid-Cooled Data Centers Sales (Units), Revenue (\$ Million), Price (US\$/Unit) and Gross Margin (2021-2026)

Table 195. GUDE Systems Main Business

Table 196. GUDE Systems Latest Developments

Table 197. DaTangBG Basic Information, High-Density Rack Power Distribution Unit?rPDU?for Liquid-Cooled Data Centers Manufacturing Base, Sales Area and Its Competitors

Table 198. DaTangBG High-Density Rack Power Distribution Unit?rPDU?for Liquid-Cooled Data Centers Product Portfolios and Specifications

Table 199. DaTangBG High-Density Rack Power Distribution Unit?rPDU?for Liquid-Cooled Data Centers Sales (Units), Revenue (\$ Million), Price (US\$/Unit) and Gross Margin (2021-2026)

Table 200. DaTangBG Main Business

Table 201. DaTangBG Latest Developments

List Of Figures

LIST OF FIGURES

Figure 1. Picture of High-Density Rack Power Distribution Unit?rPDU?for Liquid-Cooled Data Centers

Figure 2. High-Density Rack Power Distribution Unit?rPDU?for Liquid-Cooled Data Centers Report Years Considered

Figure 3. Research Objectives

Figure 4. Research Methodology

Figure 5. Research Process and Data Source

Figure 6. Global High-Density Rack Power Distribution Unit?rPDU?for Liquid-Cooled Data Centers Sales Growth Rate 2021-2032 (Units)

Figure 7. Global High-Density Rack Power Distribution Unit?rPDU?for Liquid-Cooled Data Centers Revenue Growth Rate 2021-2032 (\$ millions)

Figure 8. High-Density Rack Power Distribution Unit?rPDU?for Liquid-Cooled Data Centers Sales by Geographic Region (2021, 2025 & 2032) & (\$ millions)

Figure 9. High-Density Rack Power Distribution Unit?rPDU?for Liquid-Cooled Data Centers Sales Market Share by Country/Region (2025)

Figure 10. High-Density Rack Power Distribution Unit?rPDU?for Liquid-Cooled Data Centers Sales Market Share by Country/Region (2021, 2025 & 2032)

Figure 11. Product Picture of Basic Rack PDU

Figure 12. Product Picture of Metered / Monitored Rack PDU

Figure 13. Product Picture of Switched / Managed Rack PDU

Figure 14. Product Picture of Transfer / Redundant Rack PDU

Figure 15. Product Picture of Other

Figure 16. Global High-Density Rack Power Distribution Unit?rPDU?for Liquid-Cooled Data Centers Sales Market Share by Product Function in 2026

Figure 17. Global High-Density Rack Power Distribution Unit?rPDU?for Liquid-Cooled Data Centers Revenue Market Share by Product Function (2021-2026)

Figure 18. Product Picture of Standard Power Rack PDU

Figure 19. Product Picture of High-Power Rack PDU

Figure 20. Product Picture of Ultra-High-Power Rack PDU

Figure 21. Product Picture of Other

Figure 22. Global High-Density Rack Power Distribution Unit?rPDU?for Liquid-Cooled Data Centers Sales Market Share by Power Rating in 2026

Figure 23. Global High-Density Rack Power Distribution Unit?rPDU?for Liquid-Cooled Data Centers Revenue Market Share by Power Rating (2021-2026)

Figure 24. Product Picture of Vertical 0U Rack PDU

- Figure 25. Product Picture of Horizontal 1U Rack PDU
- Figure 26. Product Picture of Multi-U / High-Capacity PDU
- Figure 27. Product Picture of Custom Rack-Integrated PDU
- Figure 28. Global High-Density Rack Power Distribution Unit?rPDU?for Liquid-Cooled Data Centers Sales Market Share by Mounting Form Factor in 2026
- Figure 29. Global High-Density Rack Power Distribution Unit?rPDU?for Liquid-Cooled Data Centers Revenue Market Share by Mounting Form Factor (2021-2026)
- Figure 30. Product Picture of Single-Phase AC PDU
- Figure 31. Product Picture of Three-Phase AC PDU
- Figure 32. Product Picture of High-Voltage AC PDU
- Figure 33. Product Picture of Other
- Figure 34. Global High-Density Rack Power Distribution Unit?rPDU?for Liquid-Cooled Data Centers Sales Market Share by Electrical Input in 2026
- Figure 35. Global High-Density Rack Power Distribution Unit?rPDU?for Liquid-Cooled Data Centers Revenue Market Share by Electrical Input (2021-2026)
- Figure 36. High-Density Rack Power Distribution Unit?rPDU?for Liquid-Cooled Data Centers Consumed in AI Training / Inference Data Centers
- Figure 37. Global High-Density Rack Power Distribution Unit?rPDU?for Liquid-Cooled Data Centers Market: AI Training / Inference Data Centers (2021-2026) & (Units)
- Figure 38. High-Density Rack Power Distribution Unit?rPDU?for Liquid-Cooled Data Centers Consumed in HPC / Supercomputing
- Figure 39. Global High-Density Rack Power Distribution Unit?rPDU?for Liquid-Cooled Data Centers Market: HPC / Supercomputing (2021-2026) & (Units)
- Figure 40. High-Density Rack Power Distribution Unit?rPDU?for Liquid-Cooled Data Centers Consumed in Hyperscale Cloud Data Centers
- Figure 41. Global High-Density Rack Power Distribution Unit?rPDU?for Liquid-Cooled Data Centers Market: Hyperscale Cloud Data Centers (2021-2026) & (Units)
- Figure 42. High-Density Rack Power Distribution Unit?rPDU?for Liquid-Cooled Data Centers Consumed in Colocation / Enterprise Data Centers
- Figure 43. Global High-Density Rack Power Distribution Unit?rPDU?for Liquid-Cooled Data Centers Market: Colocation / Enterprise Data Centers (2021-2026) & (Units)
- Figure 44. High-Density Rack Power Distribution Unit?rPDU?for Liquid-Cooled Data Centers Consumed in Other
- Figure 45. Global High-Density Rack Power Distribution Unit?rPDU?for Liquid-Cooled Data Centers Market: Other (2021-2026) & (Units)
- Figure 46. Global High-Density Rack Power Distribution Unit?rPDU?for Liquid-Cooled Data Centers Sale Market Share by Application (2025)
- Figure 47. Global High-Density Rack Power Distribution Unit?rPDU?for Liquid-Cooled Data Centers Revenue Market Share by Application in 2025

Figure 48. High-Density Rack Power Distribution Unit?rPDU?for Liquid-Cooled Data Centers Sales by Company in 2025 (Units)

Figure 49. Global High-Density Rack Power Distribution Unit?rPDU?for Liquid-Cooled Data Centers Sales Market Share by Company in 2025

Figure 50. High-Density Rack Power Distribution Unit?rPDU?for Liquid-Cooled Data Centers Revenue by Company in 2025 (\$ millions)

Figure 51. Global High-Density Rack Power Distribution Unit?rPDU?for Liquid-Cooled Data Centers Revenue Market Share by Company in 2025

Figure 52. Global High-Density Rack Power Distribution Unit?rPDU?for Liquid-Cooled Data Centers Sales Market Share by Geographic Region (2021-2026)

Figure 53. Global High-Density Rack Power Distribution Unit?rPDU?for Liquid-Cooled Data Centers Revenue Market Share by Geographic Region in 2025

Figure 54. Americas High-Density Rack Power Distribution Unit?rPDU?for Liquid-Cooled Data Centers Sales 2021-2026 (Units)

Figure 55. Americas High-Density Rack Power Distribution Unit?rPDU?for Liquid-Cooled Data Centers Revenue 2021-2026 (\$ millions)

Figure 56. APAC High-Density Rack Power Distribution Unit?rPDU?for Liquid-Cooled Data Centers Sales 2021-2026 (Units)

Figure 57. APAC High-Density Rack Power Distribution Unit?rPDU?for Liquid-Cooled Data Centers Revenue 2021-2026 (\$ millions)

Figure 58. Europe High-Density Rack Power Distribution Unit?rPDU?for Liquid-Cooled Data Centers Sales 2021-2026 (Units)

Figure 59. Europe High-Density Rack Power Distribution Unit?rPDU?for Liquid-Cooled Data Centers Revenue 2021-2026 (\$ millions)

Figure 60. Middle East & Africa High-Density Rack Power Distribution Unit?rPDU?for Liquid-Cooled Data Centers Sales 2021-2026 (Units)

Figure 61. Middle East & Africa High-Density Rack Power Distribution Unit?rPDU?for Liquid-Cooled Data Centers Revenue 2021-2026 (\$ millions)

Figure 62. Americas High-Density Rack Power Distribution Unit?rPDU?for Liquid-Cooled Data Centers Sales Market Share by Country in 2025

Figure 63. Americas High-Density Rack Power Distribution Unit?rPDU?for Liquid-Cooled Data Centers Revenue Market Share by Country (2021-2026)

Figure 64. Americas High-Density Rack Power Distribution Unit?rPDU?for Liquid-Cooled Data Centers Sales Market Share by Product Function (2021-2026)

Figure 65. Americas High-Density Rack Power Distribution Unit?rPDU?for Liquid-Cooled Data Centers Sales Market Share by Application (2021-2026)

Figure 66. United States High-Density Rack Power Distribution Unit?rPDU?for Liquid-Cooled Data Centers Revenue Growth 2021-2026 (\$ millions)

Figure 67. Canada High-Density Rack Power Distribution Unit?rPDU?for Liquid-Cooled

Data Centers Revenue Growth 2021-2026 (\$ millions)

Figure 68. Mexico High-Density Rack Power Distribution Unit?rPDU?for Liquid-Cooled Data Centers Revenue Growth 2021-2026 (\$ millions)

Figure 69. Brazil High-Density Rack Power Distribution Unit?rPDU?for Liquid-Cooled Data Centers Revenue Growth 2021-2026 (\$ millions)

Figure 70. APAC

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