

Global Integrated In-Rack CDUs Market Growth 2026-2032

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Abstracts

The global Integrated In-Rack CDUs market size is predicted to grow from US\$ 767 million in 2025 to US\$ 2562 million in 2032; it is expected to grow at a CAGR of 18.8% 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 plays a critical role in maintaining the proper functioning of liquid cooling systems. Integrated In-Rack CDUs are optimized to efficiently and seamlessly integrate into a large, high power device like a data center server chassis. Server rack cooling is easy to use with CDU installation instructions as simple as completing the liquid loop, filling the liquid reservoir tank, and flipping the switch. These systems offer a fast option to upgrade to liquid cooling in a cost effective and reliable package and can be fully self-contained or integrated into available facility 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 Integrated In-Rack CDUs reached approximately 71 K units,

with an average global market price of around US\$ 11 K/unit. Production capacity varies significantly among manufacturers, with gross profit margins ranging from approximately 30% to 50%.

Fast Market Growth: In the current landscape dominated by AI-driven applications and dense chip architectures, liquid cooling has emerged as a pivotal technology. CDU, as a key part in liquid cooling system, will benefit from the prevalence of AI and high performance computing (HPC). The CDU market is expected to experience fast growth in the coming years.

Intensified Competition: As showing great market potential, many investors and companies have laid their attentions on the CDU market. With more and more companies will enter in the CDU industry, the whole market competition will be intensified in the coming years.

Continued Technology Innovation: CDU include liquid-to-liquid and liquid-to-air types. Though limited in cooling capability compared with liquid-to-liquid CDUs, liquid-to-air CDUs don't require water pipes, can be installed more easily, and take less space and lower initial cost than liquid-to-liquid CDUs. While although liquid-to-liquid CDUs hold the best cooling performance of all types. They require, among others, pipes to be installed to operate with a facility's water. More research and technology innovation will be put on liquid-to-liquid CDUs by CDU manufacturers to provide high performance CDU to data centers.

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

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

This Insight Report evaluates the key market trends, drivers, and affecting factors shaping the global outlook for Integrated In-Rack CDUs 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 Integrated In-Rack CDUs.

This report presents a comprehensive overview, market shares, and growth opportunities of Integrated In-Rack CDUs market by product type, application, key manufacturers and key regions and countries.

Segmentation by Type:

Liquid to Air CDU

Liquid to Liquid CDU

Segmentation by Capacity:

Capacity ? 100kW

Capacity ? 100kW

Segmentation by Deployment Scenario:

New Build Data Center Type

Retrofit Data Center Type

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 (Eaton)

Envicool

Nortek DCC

Delta Electronics

Coolcentric

Nidec

DCX

Kehua Data

Key Questions Addressed in this Report

What is the 10-year outlook for the global Integrated In-Rack CDUs market?

What factors are driving Integrated In-Rack CDUs market growth, globally and by region?

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

How do Integrated In-Rack CDUs market opportunities vary by end market size?

How does Integrated In-Rack CDUs break out by Type, by Application?

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