

Global Liquid-to-Air Coolant Distribution Unit (CDU) Market Growth 2026-2032

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Abstracts

The global Liquid-to-Air Coolant Distribution Unit (CDU) market size is predicted to grow from US\$ 470 million in 2025 to US\$ 1480 million in 2032; it is expected to grow at a CAGR of 17.8% 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. Many facilities are not designed for system-wide liquid cooling, so Liquid-to-Air CDUs provide the benefits of liquid cooling without the full-scale implementation of facility water.

A Liquid-to-Air CDU sits between the IT liquid loop and the air-side heat rejection section, so its upstream supply chain is mainly a combination of mechanical, thermal, fluid, and control components. On the downstream side, Liquid-to-Air Coolant Distribution Units are used in high-density data center liquid cooling deployments, especially for direct-to-chip cold plate loops, rear-door heat exchanger (RDHx) support, and mixed rack cooling architectures in AI/HPC, hyperscale, colocation, and retrofit projects, particularly where fast deployment and limited facility-water modifications are important.

In 2025, global sales of Liquid-to-Air Coolant Distribution Unit reached approximately 55.3 K units, with an average global market price of around US\$ 8.7 K/unit. Production

capacity varies significantly among manufacturers, with gross profit margins ranging from approximately 30% to 50%.

The market outlook for Liquid-to-Air CDUs is structurally positive because they address a practical adoption gap in data center liquid cooling: operators want to support higher-density AI/HPC workloads, but many sites cannot immediately deploy large-scale facility water infrastructure upgrades. In this context, L2A CDUs are attractive as a fast-deployment, lower-disruption bridge solution, especially for retrofits and mixed cooling environments. Vendor materials consistently position L2A products as closed-loop systems that simplify deployment and integrate with direct-to-chip cooling while reducing the need for extensive piping changes.

At the same time, L2A CDUs are not a universal replacement for all liquid cooling architectures. Their practical role is strongest where rapid rollout, modularity, and localized heat rejection matter more than maximum centralized heat rejection efficiency. As rack power density rises, operators increasingly prioritize system reliability features?such as filtration, leak detection, pump redundancy, and tighter control strategies?because downtime risk and serviceability become as important as thermal performance. This aligns with vendor feature sets and broader industry guidance emphasizing resiliency in direct liquid cooling deployments.

Market competition is also intensifying across thermal management vendors, infrastructure suppliers, and system integrators, with visible strategic investment and M&A activity around data center cooling capabilities. That reinforces a likely market direction in which L2A CDUs continue to expand as part of a broader liquid-cooling portfolio?particularly in retrofit, edge, and staged-transition projects?while coexisting with higher-capacity liquid-to-liquid architectures in large-scale AI campuses.

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

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

This Insight Report evaluates the key market trends, drivers, and affecting factors shaping the global outlook for Liquid-to-Air Coolant Distribution Unit (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 Liquid-to-Air Coolant Distribution Unit (CDU).

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

Segmentation by Type:

Rack-based CDU

Row-based CDU

Segmentation by Capacity:

Capacity > 100kW

Capacity < 100kW

Segmentation by Heat Rejection Architecture:

Self-Contained Fan-Coil Type

Ducted Airflow Type

Room-Air Recirculation Type

Other

Segmentation by Application:

Internet

Telecommunications

Finance

Government

Others

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

CoolIT Systems

Boyd (Eaton)

Envicool

Nortek DCC

Delta Electronics

Coolcentric

Nidec

Kehua Data

Key Questions Addressed in this Report

What is the 10-year outlook for the global Liquid-to-Air Coolant Distribution Unit (CDU) market?

What factors are driving Liquid-to-Air Coolant Distribution Unit (CDU) market growth, globally and by region?

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

How do Liquid-to-Air Coolant Distribution Unit (CDU) market opportunities vary by end market size?

How does Liquid-to-Air Coolant Distribution Unit (CDU) break out by Type, by Application?

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