

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

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Abstracts

The global Liquid to Air Coolant Distribution Units (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 K units, with an average global market price of around US\$ 8,678/unit. Production

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

The growth of Liquid to Air Coolant Distribution Units (CDUs) is primarily driven by the increasing demand for deployable, infrastructure-independent liquid cooling systems, particularly within edge computing environments. As distributed data processing nodes proliferate, the need for standalone thermal management solutions that do not rely on centralized chilled water systems becomes more pressing. Liquid to Air CDUs offer a flexible, plug-and-play approach well-suited for compact installations. Additionally, the broader adoption of liquid cooling technologies in high-performance workloads across telecommunications, automation, and energy sectors has expanded the application base for these systems. Furthermore, the global push for carbon neutrality and sustainability is encouraging operators to adopt cooling solutions with higher energy efficiency and lower infrastructural overhead?areas where Liquid to Air CDUs offer significant advantages.

Despite these favorable conditions, there are notable barriers hindering widespread adoption. A key limitation lies in the relatively lower cooling efficiency of air-side heat exchange compared to liquid-to-liquid counterparts, which makes Liquid to Air CDUs less suitable for ultra-high-density thermal loads. Their performance is also constrained in environments with poor ventilation or high ambient temperatures, limiting deployment in certain geographic or architectural conditions. Moreover, the lack of standardization in interface design, control protocols, and system compatibility across vendors poses integration challenges, particularly for operators managing heterogeneous IT environments.

Nevertheless, the rising prominence of modular data centers, AI inference nodes at the edge, and remote unmanned sites creates substantial growth opportunities for Liquid to Air CDUs. Their compact footprint, standalone operation, and ease of integration make them an attractive option for mission-critical deployments in sectors such as energy, transportation, and defense. As technological advancements improve noise suppression, intelligent control, and remote diagnostics capabilities, these units are well-positioned to act as a bridge solution in the broader adoption of liquid cooling, offering a low-barrier, maintenance-friendly cooling strategy for diversified application scenarios.

LP Information, Inc. (LPI) ' newest research report, the "Liquid to Air Coolant Distribution Units (CDU) Industry Forecast" looks at past sales and reviews total world Liquid to Air Coolant Distribution Units (CDU) sales in 2025, providing a comprehensive analysis by region and market sector of projected Liquid to Air Coolant Distribution Units

(CDU) sales for 2026 through 2032. With Liquid to Air Coolant Distribution Units (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 Units (CDU) industry.

This Insight Report provides a comprehensive analysis of the global Liquid to Air Coolant Distribution Units (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 Units (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 Units (CDU) market.

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

This report presents a comprehensive overview, market shares, and growth opportunities of Liquid to Air Coolant Distribution Units (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

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

Delta Electronics

Envicool

Boyd (Eaton)

Nortek DCC

Coolcentric

CoolIT Systems

Kehua Data

Key Questions Addressed in this Report

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

What factors are driving Liquid to Air Coolant Distribution Units (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 Units (CDU) market opportunities vary by end market size?

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

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