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Global Rack-Level Coolant Distribution Unit Market Growth 2026-2032

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Abstracts

The global Rack-Level Coolant Distribution Unit market size is predicted to grow from US$ 421 million in 2025 to US$ 1992 million in 2032; it is expected to grow at a CAGR of 24.4% from 2026 to 2032.

Rack-level coolant distribution units (CDUs) are liquid-circulation and heat-exchange devices installed inside a server rack or integrated with a single rack. They use pumps, plate heat exchangers, valves, filters, sensors, and control systems to isolate the facility cooling loop from the IT cooling loop and deliver coolant with controlled temperature, pressure, and flow to cold plates and rack manifolds. Products are mainly purchased by cooling capacity, heat rejection method, rack height, and redundancy configuration, and are used for rapid deployment and fault-domain isolation in high-density AI servers, high-performance computing, and liquid-cooled racks. The typical blended gross margin is approximately 38%.

AI accelerators and high-power servers continue to raise rack heat density, moving direct-to-chip liquid cooling from pilot projects toward scaled deployment. Rack-level CDUs are positioned close to the load, shortening secondary piping, reducing coolant volume, and limiting cooling failures to one rack or a small group of racks. This supports growing adoption in integrated rack delivery, brownfield retrofits, and phased capacity expansion.

Product development is shifting from conventional low- and mid-capacity units toward higher cooling capacity, lower rack-space consumption, and improved serviceability. Liquid-to-liquid designs remain the mainstream option where facility water is available, while liquid-to-air units address sites without water infrastructure or with retrofit constraints. Dual-pump or N+1 redundancy, hot-swappable components, leak and

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coolant-quality monitoring, Modbus or Redfish connectivity, and material compatibility across cold plates, manifolds, and quick disconnects are becoming central procurement criteria. The supplier base includes specialist thermal-management companies, data-center infrastructure vendors, and server OEMs, with standardized platforms and customer-specific engineering developing in parallel.

Cloud providers, colocation operators, and AI computing facilities in North America and Asia represent the main sources of incremental demand. Buyers increasingly evaluate rack-interface standards, server-platform compatibility, commissioning capability, and global service coverage. Key risks include coolant compatibility, leak-liability boundaries, inconsistent facility-water conditions, changes in server-platform standards, and price competition. Modular stacking, higher-capacity in-rack designs, switchable liquid-to-air and liquid-to-liquid architectures, and pre-integration with complete racks are the main opportunities for suppliers to expand share.

Report Scope

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

This Insight Report provides a comprehensive analysis of the global Rack-Level Coolant Distribution Unit 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 Rack-Level Coolant Distribution Unit portfolios and capabilities, market entry strategies, market positions, and geographic footprints, to better understand these firms’ unique position in an accelerating global Rack-Level Coolant Distribution Unit market.

This Insight Report evaluates the key market trends, drivers, and affecting factors shaping the global outlook for Rack-Level Coolant Distribution Unit 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 Rack-Level Coolant

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Distribution Unit.

This report presents a comprehensive overview, market shares, and growth opportunities of Rack-Level Coolant Distribution Unit market by product type, application, key manufacturers and key regions and countries.

Segmentation by Type:

Up to 50 kW

Above 50 kW to 100 kW

Above 100 kW to 200 kW

Above 200 kW

Segmentation by Heat Rejection Method:

Liquid-to-Liquid CDU

Liquid-to-Air CDU

Hybrid CDU

Segmentation by Rack Height:

Up to 4U

5U–10U

Above 10U

Segmentation by Pump Redundancy:

Single-Pump Configuration

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1+1 Redundant Pumps

N+1 Multi-Pump Redundancy

Segmentation by Application:

Cloud and Internet Service Providers

Colocation and Wholesale Data Center Operators

Enterprise Data Center Operators

Government and Research Institutions

Telecommunications and Edge Infrastructure Operators

Other AI Computing Facility Operators

This report also splits the market by region:

Americas

United States

Canada

Mexico

Brazil

APAC

China

Japan

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- 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

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Schneider Electric

CoolIT Systems

Delta Electronics

Envicool

Eaton

Supermicro

nVent

Nidec

Cooler Master

Auras Technology

Canatal

DCX

JetCool

AMAX

Coolnet

LORI Thermal

Key Questions Addressed in this Report

What is the 10-year outlook for the global Rack-Level Coolant Distribution Unit market?

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What factors are driving Rack-Level Coolant Distribution Unit market growth, globally and by region?

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

How do Rack-Level Coolant Distribution Unit market opportunities vary by end market size?

How does Rack-Level Coolant Distribution Unit break out by Type, by Application?

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