

Underfloor Heating Market Assessment, By Type [Manifolds and Valves, Heating Pipes, Zone Valves, Heating Cables, Wiring Centers, Thermostats and Sensors, Mats and Others], By Offering [Hardware, Services], By Installation Type [New Installations, Retrofit Installations], By End-use [Residential, Commercial, Industrial], By Region, Opportunities and Forecast, 2018-2032F

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Report description:

Global underfloor heating market is projected to witness a CAGR of 7.24% during the forecast period 2025-2032, growing from USD 5.54 billion in 2024 to USD 9.69 billion in 2032. The market has experienced significant growth in recent years and is expected to maintain an expansion in the coming years owing to growing requirements in cold regions for efficient heating solutions, adoption of sustainable heating solutions, and rapid growth of the construction industry. The global underfloor heating market demand is estimated to rise owing to rising awareness of the benefits of underfloor heating systems, low maintenance demand for electric heating systems, and technological advancements in underfloor heating solutions. The significant increase in awareness concerning energy efficiency and renewable energy technology considerably impacts the demand for the global underfloor heating market. These high-performance energy and heating solutions can accomplish sustainable carbon saving and contribute to meeting energy-efficient targets. In addition, the strict rules and regulations of the government concerning energy efficiency and standards towards adopting electrical and electric appliances emphasize adopting eco-friendly technologies which will further drive the global underfloor heating market growth in the years ahead. Moreover, the rising desire for enhanced comfort and aesthetics in indoor spaces has also supported the requirement for underfloor heating, as it offers a more uniform distribution of heat and a comfortable environment.

Technological innovations and construction practices have made installing underfloor heating solutions easier and more accessible. The flexibility of underfloor heating in terms of compatibility with different flooring types and its ability to integrate with modern smart home systems have further fostered the demand for underfloor heating across the globe. Additionally, the

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trend toward eco-friendly and sustainable solutions has played an essential role in the growing popularity of underfloor heating. Companies in the global market are announcing new energy-efficient underfloor heating solutions to ensure safety solutions for various applications.

For instance, in October 2024, Messe Frankfurt Group (Ambiente) announced the launch of a high-performance underfloor heating system, JoFloor 28, which aims to provide optimal heat distribution and ensure every corner of space benefits from consistent warmth.

Rising Demand for Energy Efficiency Lead to Market Growth

The global shift towards energy-efficient solutions is significantly driving the underfloor heating market. As consumers and businesses aim to reduce energy consumption and lower heating costs, underfloor heating systems, especially those powered by renewable energy sources such as solar or heat pumps, are becoming increasingly popular.

For instance, in October 2022, Warmup Plc announced the launch of the VLo line of low-profile hydronic underfloor heating systems to provide energy-saving warmth and low long-term running costs for the end-user. These systems are known for their efficiency because they heat spaces more uniformly and require lower water temperatures than traditional radiators, thus consuming less energy. Governments worldwide implement stricter energy regulations and offer grants for installing energy-efficient heating systems and encouraging eco-friendly building practices, driving the demand for energy-efficient heating solutions in the forecast period.

For instance, the Spanish government announced that it would offer grants for the installation of aérothermal heating systems to reduce carbon emissions. Additionally, the ongoing trend of sustainable construction and retrofitting existing buildings further supports the adoption of underfloor heating as part of a broader movement toward greener homes and commercial spaces.

Furthermore, companies in the market have announced the launch of efficient underfloor heating systems to address the growth of energy-efficient systems from different sectors.

For instance, in July 2023, GFS Flex Limited announced the launch of a new underfloor heating system that offers 40 times greater heat transfer efficiency than traditional PVC materials.

Growing Preference for Aesthetic Appeal Contributes to Market Growth

A major drive for the growth of the underfloor heating market is the increasing demand for aesthetic and modern interior designs. Traditional radiators can seize useful wall space and disrupt room aesthetics, while underfloor heating systems are modest, with all components hidden under the floor. This allows for more flexible interior design choices, including maximizing wall space for furniture, artwork, or windows, and creating cleaner, more minimalistic interiors. Homeowners, specifically in high-end residential and luxury segments, increasingly opt for underfloor heating to accomplish a sleek, modern look without compromising comfort. The modest nature of these systems, paired with their ability to provide even heat distribution, makes them an attractive option for those focused on functionality and aesthetics in their living and working spaces.

For instance, in August 2024, Continal Group Ltd announced the launch of the OneBoard Plus, an updated version of the OneBoard structural underfloor heating system. This system offers increased performance and faster response times than its predecessor. This launch is ideal for both newbuild and retrofit installations and addresses the rising preference for aesthetic appeal by offering greater levels of efficiency.

Residential Segment Dominates the Market Growth for Underfloor Heating

With comfort and the requirement for consistent heat distribution skyrocketing, the residential segment dominates the global underfloor heat distribution market. The underfloor heating system offers a more comfortable living environment, especially during cold months, propelling the global market demand in the forecast period. The rising preference for energy-efficient and cost-effective solutions also boosts the popularity of underfloor heating in residential applications, leading to growth opportunities for companies in the market. This launch is designed to be a cost-effective and easy-to-install choice for any residential and commercial setting. Moreover, these systems consume less energy, resulting in reduced heating bills, which is particularly appealing as energy costs continue to rise globally. Moreover, the growing trend towards home automation and smart homes further drives product adoption. Homeowners can easily integrate underfloor heating systems with smart thermostats or other smart devices, allowing for remote control and temperature optimization, driving future market demand.

Europe Holds the Largest Underfloor Heating Market Share

Europe dominates the global underfloor heating market due to environmental awareness, stringent building government

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regulations, and a growing demand for energy-efficient heating solutions. European countries, specifically those in the Nordic region, witness long and harsh winters, creating a strong requirement for reliable and effective heating systems. Underfloor heating is particularly attractive in these areas for delivering even and consistent heat, providing comfort while being energy efficient. Moreover, Europe has been in the foreground of sustainability, with stringent building codes and regulations motivating energy-saving technologies. Underfloor heating systems, especially those integrated with renewable energy sources, including heat pumps and solar power, are highly favored for their low energy consumption and reduced environmental impact. This aligns well with the EU's objective to reduce carbon emissions and encourage green building practices. Europe's residential and commercial sectors continue to see strong adoption of underfloor heating, assisted by growing construction and renovation activities, further strengthening Europe's position as the dominant market. Furthermore, companies in the market benefit from rising demand for effective heating systems and a surge in construction activities by launching new and advanced underfloor heating systems.

For instance, in May 2023, Resideo Technologies Inc, Europe's manufacturer, announced the launch of the Honeywell Home DT4 room thermostat range to help consumers improve energy efficiency in their homes.

Future Market Scenario (2025 - 2032F)

□ Underfloor heating systems are more energy-efficient compared to traditional heating methods. They operate at lower temperatures, reducing energy consumption and utility bills; factors that will significantly contribute to market growth.

□ These systems provide even heat distribution, enhancing comfort and eliminating cold spots in homes and buildings. The absence of radiators also offers more interior design flexibility.

□ Various governments are promoting energy-efficient heating solutions through incentives and regulations. These policies will encourage the adoption of underfloor heating systems.

□ Innovations such as easy-to-install electric mats, advanced control systems, and integration with smart home technologies will make underfloor heating more accessible and attractive.

Key Players Landscape and Outlook

Companies in the global underfloor heating market are leveraging various strategies to expand their market presence and boost revenue. By diversifying their product portfolios and investing in R&D, they develop innovative heating solutions such as smart thermostats, energy-efficient systems, and eco-friendly materials. Partnerships and collaborations with technology firms are also key, enabling the integration of advanced technologies such as IoT and AI into their products. Additionally, companies are focusing on geographical expansion by entering emerging markets and establishing a strong distribution network. This involves tailored marketing strategies and localized product offerings to cater to specific regional needs. Implementing sustainability initiatives, such as integrating renewable energy sources and developing green building solutions, also drives market growth and aligns with global environmental regulations. By addressing evolving consumer demands and regulatory standards, these strategies collectively enhance their market presence and revenue.

For instance, in September 2023, Amber Underfloor Heating announced the expansion of its product portfolio with two new thermostats- DT-two and DT-two+ thermostats; offering additional features and functionalities.

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*All segments will be provided for all regions and countries covered

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