

Underfloor Heating - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2025 - 2030)

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Report description:

The Underfloor Heating Market is expected to register a CAGR of 7.3% during the forecast period.

The International Energy Agency (IEA) released a report on energy consumption in buildings estimating that by 2030, the energy used by household appliances will increase, with Asia-Pacific being the region with the highest energy consumption. Further, the rising awareness about energy efficiency and renewable energy technology significantly impacts the future demand for underfloor heating systems. These energy and heating solutions can achieve substantial carbon savings and help meet renewable energy targets.

According to HCL, an estimated 10% of households worldwide are expected to be smart homes by 2025. Moreover, the growing quality of new building techniques, such as insulation and controls, stimulates the underfloor heating systems vendors to develop new solutions that cater to the increasing customer demand. For instance, Bosch offers an intelligent home and room thermostat to operate underfloor heating from anywhere. Moreover, the stringent government norms for energy efficiency & standards toward adopting electrical & electric appliances emphasize adopting sustainable technologies, which fuel market growth. The new advanced underfloor heating systems boost the replacement rates of the legacy heating systems because of high operational costs and substantial energy & heat loss. However, the slow response time of underfloor heating is one factor limiting the growth of underfloor heating systems.

With the outbreak of COVID-19, governments worldwide imposed restrictions on down day-to-day business operations by implementing lockdowns. Due to this, there were labor shortages and delays in projects, drastically impacting the global construction & infrastructure industry, resulting in a decline in product deployment. Hence, the market is likely to face challenges till the market resurgence. A key drawback of underfloor heating is that installation and maintenance require significant

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intervention. The existing flooring and heating infrastructure needs to be removed, new heating pipes installed, and concrete poured. This can be costly, destructive, and off-putting to potential customers, which is expected to restrain market growth over the forecast period.

Underfloor Heating Market Trends

Residential Sector to Drive the Market Growth

- The residential sector holds the maximum market share for the underfloor heating market due to people's growing inclination toward a better standard of living. Moreover, refurbishment activities and smart home initiatives further boost the market growth. The smart home market is anticipated to register a CAGR of 25% over the forecast period and is expected to reach USD 246.42 billion in the next five years.
- Underfloor heating is 15-20% more energy efficient than traditional methods and, therefore, reduces the overall carbon footprint of a building. It is, therefore, considered an optimal solution for heating homes. Further, government advisers have recently recommended banning gas boilers installation in new homes, stimulating market growth.
- Moreover, the increasing adoption of underfloor heating in the residential sector is due to its advantages over radiators. The advantages include more comfort, adequate heat, and less expensive bills. Moreover, the air circulated from underfloor heating is cleaner than the air pushed around by radiators.
- Further, vendors are investing in research & development to create better products in the market. For instance, in November 2021, Meross, a Chinese smart home gadget maker, produced its first smart thermostat for electrically underfloor heating systems. The innovative gadget uses a glass screen featuring a touch-sensitive, illuminated LED display to manage every part of the heater system and functions broadly similar to any regular cable thermostat.
- By 2025, the United Kingdom is expected to have a Future Homes Standard that will require new homes to be future-proofed with low-carbon heating and world-leading energy efficiency. According to the UK Department for Business, Energy & Industrial Strategy, homes built to this standard should emit 75% to 80% less CO₂ than homes built to current construction requirements.

Europe Holds Maximum Market Share

- Europe holds the maximum market share as the region has a strong presence of underfloor heating vendors, such as Robert Bosch GmbH, Siemens AG, Schneider Electric, Nexans S.A., and nVent Electric plc, among others. Moreover, Europe has been witnessing an increasing number of players entering the market, owing to the rising inclination toward energy-efficient buildings that are enabling companies to earn more profit by expanding their sales.
- According to the European Commission, by volume, the installed base of smart home and intelligent building devices in the region is expected to grow to over 980 million units in the next five years, considering energy management and security-based devices. Additionally, the European Union topped the investments in energy-efficient buildings, according to OECD. Therefore, with the increase in investments and emphasis on energy-efficient buildings in the region, the market is likely to grow over the forecast period.
- The region is witnessing multiple acquisition activities. For instance, in February 2021, the UK-based Polypipe Group PLC, the manufacturer of water management and climate management solutions, announced its acquisition of the UK-based Nu-Heat (Holdings) Limited, the supplier of sustainable underfloor heating solutions, air and ground source heat pumps, and other renewable heating systems, for a total consideration of GBP 27 million on a cash-free, debt-free basis. This acquisition will enable Polypipe Group to further develop underfloor heating capabilities and new ways to integrate underfloor heating, heat pumps, and air-based climate management systems.
- Intense R&D operations and public knowledge about the prospects of heating systems in the building sector, particularly in cold

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locations, had a favorable impact on market growth. The continuous large-scale renovations and government rules prohibiting the installation of gas boilers in new homes by 2025 have fueled the expansion of the electric underfloor heating business. Colder climatic conditions in this region, people's demand for comfort in their homes, and the benefits of radiant heat are expected to propel the market growth.

Underfloor Heating Industry Overview

The global underfloor heating market is highly fragmented. Major players in the market are using strategies, such as new product launches, expansions, agreements, partnerships, acquisitions, and others, to increase their footprints in this market. Some players operating in the market include Uponor Corporation, Emersion Electric Co., Honeywell International Inc., Mitsubishi Electric Corporation, and nVent Electric PLC.

In January 2022, Feenstra announced a high-temperature heating pump system for traditional single-family houses in the Netherlands that are said to be a simple replacement for typical gas centralized heating boilers.

In November 2021, nVent Electric PLC launched commercial software with enhanced work packing and heat mapping features. It introduced software that integrates 3D plant modeling systems from the customer with incorporated heat management system (HMS) design capabilities.

Additional Benefits:

- The market estimate (ME) sheet in Excel format
- 3 months of analyst support

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