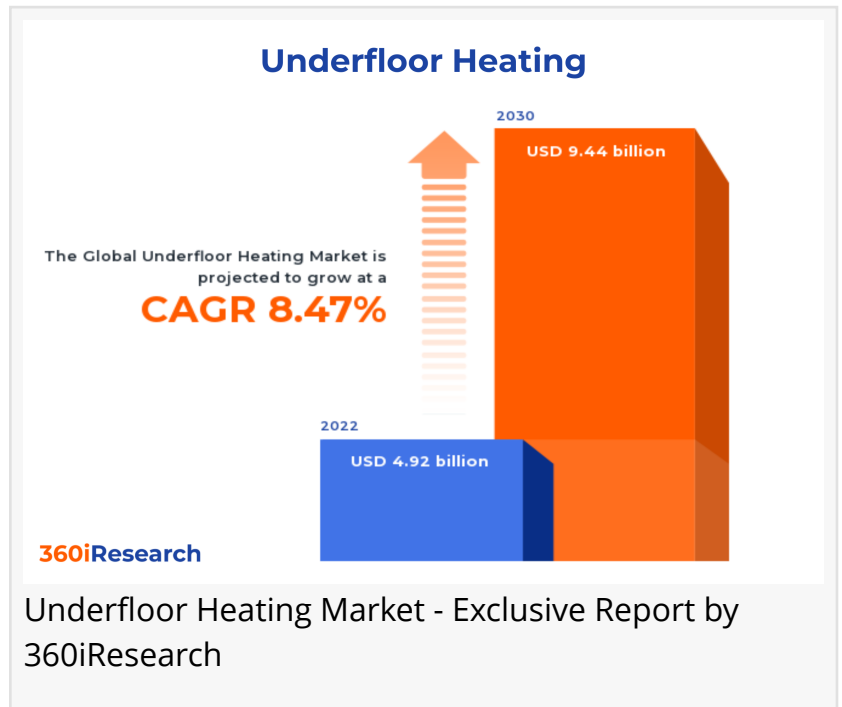


# Underfloor Heating Market worth \$9.44 billion by 2030, growing at a CAGR of 8.47% - Exclusive Report by 360iResearch

*The Global Underfloor Heating Market to grow from USD 4.92 billion in 2022 to USD 9.44 billion by 2030, at a CAGR of 8.47%.*

PUNE, MAHARASHTRA, INDIA, November 10, 2023 / EINPresswire.com/ -- The "[Underfloor Heating Market](#) by Offering (Hardware, Services), Type (Electric Underfloor Heating, Hydronic Underfloor Heating), Installation Type, Application - Global Forecast 2023-2030" report has been added to 360iResearch.com's offering.



The Global Underfloor Heating Market to grow from USD 4.92 billion in 2022 to USD 9.44 billion by 2030, at a CAGR of 8.47%.

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The underfloor heating market involves the manufacturing, distribution, and installation of systems that provide radiant heating beneath various types of flooring surfaces. These systems efficiently heat residential, commercial, and industrial buildings by evenly distributing heat across a room while minimizing energy consumption. The primary function of underfloor heating is to maintain comfortable indoor temperatures in colder climates while enhancing energy efficiency. The increasing industrialization and urbanization and surging demand for commercial, residential, and industrial buildings drive the demand for underfloor heating. On the contrary, the cost associated with installing underfloor heating systems and functional issues limit market growth. However, initiatives towards smart city development and introducing improved underfloor heating systems are expected to proliferate the market growth in the coming years.

Type: Proliferating use of hydronic underfloor heating systems for larger properties or new construction

Electric underfloor heating systems are preferred for their ease of installation and lower upfront costs than hydronic systems. They are more suitable for smaller spaces or home renovations where access to plumbing may not be feasible. Additionally, these systems require minimal maintenance and have programmable thermostats that allow greater control over temperature settings. However, electric underfloor heating might not be ideal for large areas due to higher ongoing energy costs associated with electricity consumption. It is also essential to consider the insulation properties of the flooring material since inadequate insulation can lead to a loss of heat efficiency. Hydronic underfloor heating systems utilize a network of pipes embedded in the floor, circulating hot water or other heat transfer fluids to generate and distribute heat evenly throughout the space. These systems are compatible with various flooring materials, such as concrete, tile, stone, and wood. Hydronic systems are often preferred for larger properties or new constructions due to their higher heat output capacity and energy efficiency. Furthermore, hydronic systems provide more consistent temperature regulation over time than their electric counterparts. However, these systems have higher upfront costs and require complex installation procedures involving plumbing connections and potential floor-leveling adjustments. Additionally, hydronic underfloor heating requires regular maintenance checks to ensure optimal performance and prevent leakages.

Application: High adoption of underfloor heating systems in industrial sectors

Commercial underfloor heating solutions are designed to provide efficient space heating for offices, hotels, retail spaces, schools, hospitals, and other public buildings. These systems are preferred for their energy efficiency and ability to maintain a consistent temperature across large areas. They also eliminate the need for visible radiators or heaters that can restrict available floor space and pose aesthetic challenges. Suitability criteria for commercial applications include ease of installation in new construction or retrofit projects, compatibility with different types of flooring materials such as carpet, hardwood, or tiles, and integration with existing building management systems. Industrial underfloor heating systems cater to manufacturing facilities, warehouses, agricultural buildings, or workshops. Maintaining an even temperature is crucial for employee comfort and specific processes requiring stable environmental conditions in these settings. Frost protection is another key aspect of industrial applications, where underfloor heating helps prevent damage to equipment and infrastructure. Suitability criteria for industrial applications include high heat output, durability, and resistance to chemicals or other harsh substances commonly found in such environments. Residential underfloor heating has become increasingly popular due to its comfort, energy efficiency, and space-saving advantages over traditional radiators. Homeowners can opt for electric or hydronic systems based on their requirements and existing infrastructure. These systems are suitable for various types of flooring, including tiled bathrooms, kitchens with solid wood floors, or carpeted living areas. Suitability criteria for residential applications include user-friendly controls such as smart thermostats connected to mobile devices, ease of installation during new construction or renovation projects, and long-term reliability.

**Offering:** Significant adoption of underfloor heating hardware to generate and manage heat

The underfloor heating market offers various hardware solutions, including electric and hydronic systems designed to cater to different needs, preferences, and budgets. Depending on the type of underfloor heating system, the hardware components include thermostats (heating controls), underfloor heating control pack and manifold, wiring center, pipes, circulating pumps, valves, and others to generate, distribute, and manage heat. Services related to underfloor heating encompass design consultation, installation support, maintenance, repairs, and system upgrades. The service provided in underfloor heating includes assisting clients with selecting the most appropriate system based on their specific requirements, budget limitations, and property characteristics. This involves conducting site assessments, performing heat loss calculations, and evaluating various options concerning system components, materials, and installation methods. Additionally, experts in the field work closely with builders, architects, and homeowners throughout the design and installation process to ensure optimal system performance and integration with other building systems. Maintenance of underfloor heating systems is another essential aspect of the service provided. Key considerations in determining the preference and suitability of service providers include expertise, quality, and affordability.

**Installation Type:** Potential use of new installation among homeowners and builders for constructing new homes or commercial properties

A new installation refers to integrating an underfloor heating system into a building during its initial construction phase, which is the ideal time to install an underfloor heating system, as it allows for proper planning and integration with the overall structure design. New installations have several advantages over retrofitting, including better heat distribution due to optimal design integration and lower long-term maintenance costs. However, initial investment costs may be higher than those associated with retrofitting an existing space. Retrofitting refers to integrating an underfloor heating system into an existing structure, which can be more complex than a new installation due to potential constraints related to available space, insulation materials, or environmental factors. Retrofitting offers the advantage of improving energy efficiency and comfort in older buildings without requiring extensive renovations. However, there may be limitations regarding available space for insulation materials and equipment or compatibility with existing building systems.

**Regional Insights:**

The Americas region has experienced a steady growth in underfloor heating demand due to increased construction activities and energy-efficient building regulations. The U.S. standards, such as LEED certification, encourage sustainable construction practices incorporating energy-saving technologies. Although this presents opportunities for manufacturers, it also calls for compliance with strict regulatory requirements. Asia-Pacific is expected to have an accelerated growth rate in the underfloor heating market due to rapid urbanization, increasing disposable income levels, and government initiatives promoting energy-efficient technologies. Countries such as China and India provide immense potential for expansion due to increasing investments in the construction sector and smart city initiatives launched by the governments. To capitalize

on this market opportunity, some companies are forming strategic partnerships with local firms or investing directly in regional production facilities. The EMEA region holds a significant share of the global underfloor heating market due to stringent regulations to decrease carbon emissions and increase energy efficiency in buildings. The region also has the presence of prominent players involved in continuous process improvement and launch. Meanwhile, emerging countries in the region require tailored strategies targeting local competition and regional preferences.

#### FPNV Positioning Matrix:

The FPNV Positioning Matrix is essential for assessing the Underfloor Heating Market. It provides a comprehensive evaluation of vendors by examining key metrics within Business Strategy and Product Satisfaction, allowing users to make informed decisions based on their specific needs. This advanced analysis then organizes these vendors into four distinct quadrants, which represent varying levels of success: Forefront (F), Pathfinder (P), Niche (N), or Vital(V).

#### Market Share Analysis:

The Market Share Analysis offers an insightful look at the current state of vendors in the Underfloor Heating Market. By comparing vendor contributions to overall revenue, customer base, and other key metrics, we can give companies a greater understanding of their performance and what they are up against when competing for market share. The analysis also sheds light on just how competitive any given sector is about accumulation, fragmentation dominance, and amalgamation traits over the base year period studied.

#### Key Company Profiles:

The report delves into recent significant developments in the Underfloor Heating Market, highlighting leading vendors and their innovative profiles. These include Ambiente Systems Ltd., Amuheat Pty Limited, Arkon Heating, ASIASTAR co., Ltd., Daikin Industries, Ltd., Danfoss A/S, Devex Systems Pty Limited, Emerson Electric Co., EMPUR Produktions GmbH, ESI Heating and Cooling, Flexel International Ltd., Gaia Climate Solutions, Genuit Group PLC, Gold Heat, Green Building Renewables, Hemstedt GmbH, Hunt Heating, IMI PLC, Incognito Heat Co Ltd., Janes Radiant Heating, JK floorheating Ltd., Mitsubishi Electric Corporation, Mysa, Nexans, S.A., nVent Electric PLC, OJ Electronics A/S By BITZER Kühlmaschinenbau GmbH, Purmo Group Oy Ab, REHAU Limited, Reliance Worldwide Corporation Ltd., Resideo Technologies, Inc., Robert Bosch GmbH, Schluter Systems L.P., Schneider Electric SE, Schütz GmbH & Co. KGaA, Siemens AG, Stiebel Eltron GmbH & Co. KG, Therma-HEXX Corporation, ThermoSoft International Corp., Uponor Corporation, and Warmup PLC.

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## Market Segmentation & Coverage:

This research report categorizes the Underfloor Heating Market in order to forecast the revenues and analyze trends in each of following sub-markets:

Based on Offering, market is studied across Hardware and Services. The Hardware commanded largest market share of 77.35% in 2022, followed by Services.

Based on Type, market is studied across Electric Underfloor Heating and Hydronic Underfloor Heating. The Electric Underfloor Heating commanded largest market share of 65.86% in 2022, followed by Hydronic Underfloor Heating.

Based on Installation Type, market is studied across New Installation and Retrofitting. The New Installation commanded largest market share of 71.86% in 2022, followed by Retrofitting.

Based on Application, market is studied across Commercial, Industrial, and Residential. The Residential commanded largest market share of 51.65% in 2022, followed by Industrial.

Based on Region, market is studied across Americas, Asia-Pacific, and Europe, Middle East & Africa. The Americas is further studied across Argentina, Brazil, Canada, Mexico, and United States. The United States is further studied across California, Florida, Illinois, New York, Ohio, Pennsylvania, and Texas. The Asia-Pacific is further studied across Australia, China, India, Indonesia, Japan, Malaysia, Philippines, Singapore, South Korea, Taiwan, Thailand, and Vietnam. The Europe, Middle East & Africa is further studied across Denmark, Egypt, Finland, France, Germany, Israel, Italy, Netherlands, Nigeria, Norway, Poland, Qatar, Russia, Saudi Arabia, South Africa, Spain, Sweden, Switzerland, Turkey, United Arab Emirates, and United Kingdom. The Europe, Middle East & Africa commanded largest market share of 39.14% in 2022, followed by Americas.

## Key Topics Covered:

1. Preface
2. Research Methodology
3. Executive Summary
4. Market Overview
5. Market Insights
6. Underfloor Heating Market, by Offering
7. Underfloor Heating Market, by Type
8. Underfloor Heating Market, by Installation Type
9. Underfloor Heating Market, by Application
10. Americas Underfloor Heating Market
11. Asia-Pacific Underfloor Heating Market
12. Europe, Middle East & Africa Underfloor Heating Market

- 13. Competitive Landscape
- 14. Competitive Portfolio
- 15. Appendix

The report provides insights on the following pointers:

1. Market Penetration: Provides comprehensive information on the market offered by the key players
2. Market Development: Provides in-depth information about lucrative emerging markets and analyzes penetration across mature segments of the markets
3. Market Diversification: Provides detailed information about new product launches, untapped geographies, recent developments, and investments
4. Competitive Assessment & Intelligence: Provides an exhaustive assessment of market shares, strategies, products, certification, regulatory approvals, patent landscape, and manufacturing capabilities of the leading players
5. Product Development & Innovation: Provides intelligent insights on future technologies, R&D activities, and breakthrough product developments

The report answers questions such as:

1. What is the market size and forecast of the Underfloor Heating Market?
2. Which are the products/segments/applications/areas to invest in over the forecast period in the Underfloor Heating Market?
3. What is the competitive strategic window for opportunities in the Underfloor Heating Market?
4. What are the technology trends and regulatory frameworks in the Underfloor Heating Market?
5. What is the market share of the leading vendors in the Underfloor Heating Market?
6. What modes and strategic moves are considered suitable for entering the Underfloor Heating Market?

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