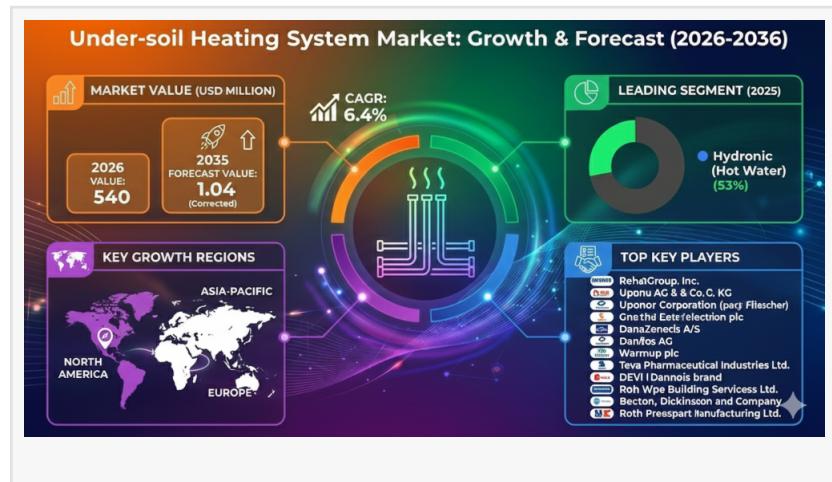


Under-soil Heating System Market Forecast 2026–2036: Market to Reach USD 1,004 Million by 2036 at 6.4% CAGR

Under-soil Heating System Market to Grow Steadily, Driven by Sports Infrastructure and Cold Climate Demand Through 2034

ROCKVILLE, MD, UNITED STATES, February 20, 2026 /EINPresswire.com/ -- The global under soil heating system market is projected to grow from a value of US\$ 540 million in 2026 to US\$ 1,004 million by the end of 2036. This steady expansion, driven by a compound annual growth rate (CAGR) of 6.4%, reflects the increasing necessity of advanced climate control in professional sports turf management and high-yield agriculture.



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Market snapshot: global Under-soil Heating System Market demand 2026 - 2036

Market size 2026? The market is estimated to reach US\$ 540 million by 2026.

Market size 2036? The market is projected to hit US\$ 1,004 million by 2036.

CAGR? The market will expand at a steady CAGR of 6.4% through 2036.

Leading product segment(s) and shares? The cables & mats segment holds a dominant 45.1% share, while sensors & controllers account for 25.6% of the market.

Leading material type and share? Plastic-based heating systems lead the market with a 58.1% share due to their flexibility and corrosion resistance.

Leading end use and share? The sports facilities segment is the primary end user, commanding 51.9% of the global market share.

Key growth regions? Significant growth is concentrated in North America, Europe (Germany, UK), and East Asia (China).

Top companies? Key players include REHAU, Danfoss, Uponor, Wavin, nVent, Watts Water

Technologies, and Zehnder Group.

Market Momentum (YoY Path)

The under soil heating system market follows a consistent upward trajectory. Starting at US\$ 181.3 million in 2026, the market is expected to climb to US\$ 202.6 million by 2028. Continued adoption will push the value to US\$ 226.5 million in 2030 and US\$ 239.5 million in 2031. Growth accelerates in the later forecast years, reaching US\$ 267.7 million by 2033 and ultimately achieving a market valuation of US\$ 315.6 million by 2036.

Why the Market is Growing

The primary growth driver is the rising demand for year-round turf usability in professional sports, particularly in regions with harsh winters. Additionally, the agricultural sector is adopting these systems to maintain optimal root zone temperatures, which enhances crop yields and extends growing seasons. Technological shifts toward energy-efficient hydronic and electric systems also play a critical role in market expansion.

Segment Spotlight

Product Type: The cables & mats segment dominates with a 45.1% market share. These components are favored for their ease of installation and ability to provide uniform heat distribution across large surfaces like football pitches and greenhouses.

Material Type: Plastic materials hold a 58.1% share. The preference for plastic is driven by its durability, resistance to chemical fertilizers in soil, and lower cost compared to metal alternatives, making it the standard for modern installations.

End Use: Sports facilities represent 51.9% of the market. The need to prevent ground freezing and ensure player safety on natural and hybrid grass drives the heavy investment from stadium owners and sports organizations.

Drivers, Opportunities, Trends, Challenges

Drivers: Increased investment in premium sports infrastructure and the modernization of commercial greenhouses are the core drivers. Organizations are prioritizing systems that prevent frost damage and ensure consistent plant growth.

Opportunities: There is a significant opportunity in integrating smart controllers and IoT sensors. These technologies allow for precise temperature monitoring, which reduces energy waste and appeals to sustainability-focused buyers.

Trends: A major trend is the shift from traditional heating methods to automated hydronic systems. These systems offer better heat retention and are increasingly being paired with renewable energy sources to lower operational costs.

Challenges: High initial installation costs and the complexity of retrofitting existing fields remain primary challenges. Additionally, the maintenance of underground components requires specialized labor, which can deter smaller commercial entities.

Country Growth Outlook (CAGR)

The country-specific growth outlook for the 2026–2036 period shows India leading with a projected CAGR of 7.4%, followed closely by China at 6.8% and Brazil at 5.5%. European markets exhibit steady growth with the UK at 5.2%, Germany at 4.9%, and France at 4.6%, while the USA is expected to expand at a CAGR of 5.1%.

Competitive Landscape

The competitive environment is characterized by established engineering firms focusing on energy efficiency and system longevity. Leading manufacturers such as REHAU, Danfoss, and Uponor are investing in advanced pipe and cable technologies. Other prominent players include Wavin, nVent, Watts Water Technologies, Zehnder Group, Emerson Electric, and Wieland Holding.

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