

Global Condensing Boiler Supply, Demand and Key Producers, 2026-2032

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Abstracts

The global Condensing Boiler market size is expected to reach \$ 7326 million by 2032, rising at a market growth of 4.7% CAGR during the forecast period (2026-2032).

A Condensing Boiler is a high-efficiency hot-water boiler, typically fired by natural gas or liquefied petroleum gas, that recovers latent heat from water vapor in the flue gas by condensing it after primary heat exchange. It is commonly manufactured as a wall-hung or floor-standing cabinet unit and typically consists of a burner, a corrosion-resistant high-efficiency heat exchanger, a fan, a gas valve, ignition and flame-sensing devices, hydraulic components, a control system, a venting assembly, and a condensate drainage unit. Compared with conventional boilers, it lowers flue-gas temperature further to induce condensation and transfer the released latent heat to the return water, thereby improving thermal efficiency while reducing fuel consumption and emissions. By form and use, it can be classified into wall-hung, floor-standing, heating-only, combi, residential, and commercial types. Typical applications include residential space heating, domestic hot water, schools, hospitals, hotels, offices, commercial buildings, and selected industrial hot-water systems, especially those using low-temperature emitters, radiant floor heating, and retrofit projects.

The global investment case for Condensing Boilers lies not merely in higher thermal efficiency, but in their role as a practical, financeable, and engineer-friendly pathway for upgrading building heating systems. In many regions where natural gas or liquid fuels still dominate thermal supply, the installed base of aging non-condensing boilers and legacy hydronic systems creates a large replacement opportunity shaped by energy efficiency compliance, emissions pressure, and operating-cost optimization. The opportunity is reinforced by three structural shifts: tighter building energy codes and decarbonization agendas that favor high-efficiency equipment capable of fitting into

existing water-based systems; the maturation of modular design, premix combustion, variable control, building automation, and remote service tools that turn the boiler from a heat source into a manageable energy asset; and rising end-user preference for integrated space-heating and domestic hot-water solutions in both residential and commercial settings. For executives and investors, this is best understood as a resilient upgrade market supported by regulation, installed-base renewal, system integration, and service monetization rather than by short-lived technology hype.

That said, Condensing Boilers do not compete on equal footing in every geography or every system environment. Their real-world performance depends heavily on low return-water temperatures, suitable heat emitters, corrosion-resistant materials, and compliant venting and condensate management. When they are inserted into high-temperature legacy systems without proper redesign, much of the expected efficiency gain can be diluted in operation. The sector therefore carries several strategic risks: first, higher upfront equipment and retrofit costs keep project owners highly sensitive to payback, shutdown windows, and installation complexity; second, electrification policies, heat-pump adoption, and broader efforts to reduce fossil-fuel dependence are reshaping heating priorities in some markets, pushing gas-based high-efficiency solutions from long-term default choice toward regional best fit or transition option; third, competition is no longer centered on combustion efficiency alone, but increasingly on controls, compatibility, installer training, after-sales response, and lifecycle operating performance. The winners are likely to be companies that can package product performance, systems engineering, compliance readiness, and service execution into a compelling full-solution offering.

Downstream demand is also evolving from the purchase of a standalone boiler toward the procurement of a smarter, lower-emission, space-efficient, and easier-to-maintain thermal management solution. In residential markets, buyers increasingly value comfort, quiet operation, compact form factors, stable domestic hot-water delivery, and lower annual energy bills, which continues to favor wall-hung, combi, and low-temperature-compatible models. In commercial and institutional buildings such as hotels, schools, hospitals, offices, retail properties, and mixed-use assets, demand is shifting toward systems that can handle fluctuating loads, provide redundancy, support remote monitoring, enable predictive maintenance, and be phased into retrofit programs with minimal disruption. More importantly, future demand is unlikely to follow a simple boiler-for-boiler replacement pattern. It is more likely to move toward hybrid architectures and scenario-based configurations in which condensing boilers work alongside heat pumps, thermal storage, solar thermal assets, or advanced hot-water systems to deliver the

most practical balance of economics, resilience, and emissions performance under different climates and energy price structures. For industry participants, the most defensible growth opportunity will come not only from equipment sales, but from design capability, controls integration, commissioning, maintenance, and deep participation in retrofit ecosystems.

This report studies the global Condensing Boiler production, demand, key manufacturers, and key regions.

This report is a detailed and comprehensive analysis of the world market for Condensing Boiler and provides market size (US\$ million) and Year-over-Year (YoY) Growth, considering 2025 as the base year. This report explores demand trends and competition, as well as details the characteristics of Condensing Boiler that contribute to its increasing demand across many markets.

Highlights and key features of the study

Global Condensing Boiler total production and demand, 2021-2032, (K Units)

Global Condensing Boiler total production value, 2021-2032, (USD Million)

Global Condensing Boiler production by region & country, production, value, CAGR, 2021-2032, (USD Million) & (K Units), (based on production site)

Global Condensing Boiler consumption by region & country, CAGR, 2021-2032 & (K Units)

U.S. VS China: Condensing Boiler domestic production, consumption, key domestic manufacturers and share

Global Condensing Boiler production by manufacturer, production, price, value and market share 2021-2026, (USD Million) & (K Units)

Global Condensing Boiler production by Type, production, value, CAGR, 2021-2032, (USD Million) & (K Units)

Global Condensing Boiler production by Application, production, value, CAGR, 2021-2032, (USD Million) & (K Units)

This report profiles key players in the global Condensing Boiler market based on the following parameters - company overview, production, value, price, gross margin, product portfolio, geographical presence, and key developments. Key companies covered as a part of this study include Bosch, Carrier / Viessmann Climate Solutions, Rheem, Vaillant, A. O. Smith, Ariston Group, BDR Thermea, Weishaupt, Cleaver-Brooks, Ferroli, etc.

This report also provides key insights about market drivers, restraints, opportunities,

new product launches or approvals.

Stakeholders would have ease in decision-making through various strategy matrices used in analyzing the World Condensing Boiler market

Detailed Segmentation:

Each section contains quantitative market data including market by value (US\$ Millions), volume (production, consumption) & (K Units) and average price (USD/Unit) by manufacturer, by Type, and by Application. Data is given for the years 2021-2032 by year with 2025 as the base year, 2026 as the estimate year, and 2027-2032 as the forecast year.

Global Condensing Boiler Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Global Condensing Boiler Market, Segmentation by Type:

Vertical

Horizontal

Global Condensing Boiler Market, Segmentation by Fuel Compatibility:

Natural Gas Condensing Boiler

LPG / Propane Condensing Boiler

Dual-Fuel Convertible Condensing Boiler

Global Condensing Boiler Market, Segmentation by Air Intake and Flue Configuration:

Room-Sealed Condensing Boiler

Open-Flue Condensing Boiler

Global Condensing Boiler Market, Segmentation by Main Heat Exchanger Material:

Stainless Steel Heat Exchanger Condensing Boiler

Aluminum Alloy Heat Exchanger Condensing Boiler

Cast Iron Heat Exchanger Condensing Boiler

Other

Global Condensing Boiler Market, Segmentation by Application:

Industrial

Commercial Building

Residential Building

Companies Profiled:

Bosch

Carrier / Viessmann Climate Solutions

Rheem

Vaillant

A. O. Smith

Ariston Group

BDR Thermea

Weishaupt

Cleaver-Brooks

Ferrol

Navien

AERCO

Hoval

ICI Caldaie

Patterson-Kelley

Key Questions Answered:

1. How big is the global Condensing Boiler market?
2. What is the demand of the global Condensing Boiler market?
3. What is the year over year growth of the global Condensing Boiler market?
4. What is the production and production value of the global Condensing Boiler market?
5. Who are the key producers in the global Condensing Boiler market?
6. What are the growth factors driving the market demand?

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