

Hydronic HVAC Systems Market Forecasts to 2032 – Global Analysis By Product (Hydronic Boilers, Heat Pumps, Radiant Heating System, Chillers, Air Conditioning Units, Fancoils, AHU, and Cooling Tower), Fuel Type, End User and By Geography

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Abstracts

According to Statistics MRC, the Global Hydronic HVAC Systems Market is accounted for \$20.5 billion in 2025 and is expected to reach \$35.9 billion by 2032 growing at a CAGR of 8.3% during the forecast period. Hydronic HVAC Systems are heating and cooling systems that circulate water or glycol through pipes to regulate indoor temperatures. Utilizing boilers, chillers, and radiant floor panels, they provide energy-efficient, uniform climate control with minimal noise. These systems are common in residential, commercial, and industrial settings due to their adaptability, zoning capabilities, and compatibility with renewable energy sources like solar thermal. Hydronic systems offer superior comfort and lower operational costs compared to forced-air alternatives.

Market Dynamics:

Driver:

Increasing demand for green buildings

The rising demand for energy-efficient and sustainable buildings is fueling the adoption of hydronic HVAC systems. These systems offer superior energy efficiency compared to traditional air-based systems, supporting green building certifications. Government incentives for eco-friendly construction projects drive market growth. Growing awareness of carbon footprint reduction among building owners enhances system

appeal. Advancements in hydronic technology improve system performance and reliability. The focus on occupant comfort in sustainable designs boosts market potential. Hydronic HVAC systems align with global sustainability goals, propelling market expansion.

Restraint:

High initial installation costs

The high upfront costs of installing hydronic HVAC systems, including boilers and piping, deter adoption in cost-sensitive markets. Complex installation processes require skilled labor, increasing expenses. Limited economies of scale in smaller projects restrict affordability. The need for regular maintenance adds to long-term costs. Lack of awareness about energy savings hinders market penetration. High retrofit costs for existing buildings limit scalability.

Opportunity:

Growth in district heating applications

The expansion of district heating systems in urban areas is creating opportunities for hydronic HVAC systems. These systems efficiently distribute heat across multiple buildings, enhancing energy conservation. Government investments in smart city infrastructure drive demand for district heating. Partnerships with energy providers foster innovation in hydronic solutions. The trend toward centralized heating in cold climates boosts market appeal. Regulatory support for low-carbon heating systems encourages adoption.

Threat:

Competition from VRF and other HVAC systems

Variable Refrigerant Flow (VRF) and other HVAC systems compete with hydronic systems due to their flexibility and lower installation costs. VRF systems offer easier retrofitting in existing buildings, challenging hydronic adoption. Advances in air-based HVAC technologies improve energy efficiency, reducing hydronic appeal. Lack of awareness about hydronic benefits limits market share. High compatibility of VRF with modern building designs attracts developers. The shift toward compact HVAC solutions threatens growth. This competition poses a significant challenge to the hydronic HVAC

market.

Covid-19 Impact:

The COVID-19 pandemic disrupted construction activities, delaying the installation of hydronic HVAC systems. Supply chain disruptions impacted the availability of key components like boilers and pipes. However, the focus on healthy indoor environments boosted demand for efficient HVAC solutions. Labor shortages and logistics challenges hindered project timelines. Rising raw material costs during the crisis affected affordability. The pandemic accelerated investments in green buildings, driving recovery. Post-pandemic growth in sustainable construction is expected to fuel market expansion.

The hydronic boilers segment is expected to be the largest during the forecast period

The hydronic boilers segment is expected to account for the largest market share during the forecast period propelled by its critical role in providing efficient heating for residential and commercial buildings. Boilers offer reliable and consistent heat distribution, driving adoption in cold climates. Advances in boiler technology enhance energy efficiency and durability. The rise in green building projects supports segment growth. Regulatory incentives for low-emission boilers ensure market trust. The versatility of hydronic boilers across building types strengthens market share.

The natural gas segment is expected to have the highest CAGR during the forecast period

Over the forecast period, the natural gas segment is predicted to witness the highest growth rate driven by the increasing adoption of natural gas-powered hydronic systems for their cost-effectiveness. Natural gas offers lower operational costs compared to electric alternatives, boosting demand. The rise in district heating projects fuels segment expansion. Innovations in high-efficiency gas boilers improve system performance. Regulatory support for cleaner fuel sources drives adoption. Partnerships with energy suppliers enhance supply chain efficiency. The trend toward low-carbon heating solutions propels this segment's growth.

Region with largest share:

During the forecast period, the Asia Pacific region is expected to hold the largest market share owing to its booming construction sector and cold climate regions in countries like

China and Japan. High demand for energy-efficient heating systems drives hydronic HVAC adoption. Government support for green building initiatives strengthens market growth. The presence of key HVAC manufacturers enhances regional dominance. Rising urbanization fuels demand for district heating. The focus on sustainable construction supports expansion.

Region with highest CAGR:

Over the forecast period, the North America region is anticipated to exhibit the highest CAGR fueled by strong demand for green and energy-efficient buildings. The region's advanced construction ecosystem drives innovation in hydronic technologies. Regulatory incentives for low-carbon heating systems boost adoption. The presence of leading HVAC firms fosters market growth. Growing awareness of sustainability supports expansion. Investments in smart city infrastructure drive product development.

Key players in the market

Some of the key players in Hydronic HVAC Systems Market include AirFixture, LLC, Amuheat, B&H Industrial, Baxi North America, Bindus Manufacturing, LLC (AQUECOIL), Danfoss A/S, Hurlcon Hydronic Heating, Johnson Controls, Inc., Mitsubishi Electric Hydronics & IT Cooling Systems S.p.A., Oventrop (China) HVAC Systems Technology Co., Ltd, Rehau, Inc., Schluter-Systems KG, Tamas Hydronic Systems, Inc., Warmboard, Inc., and Watts Water Technologies, Inc.

Key Developments:

In April 2025, Danfoss A/S launched its next-generation hydronic balancing valves, improving energy efficiency and comfort in commercial buildings through precise flow control and integration with building management systems.

In April 2025, Rehau, Inc. introduced RAUTHERM NEX, a flexible PEX piping system designed for radiant heating and cooling applications, offering enhanced durability and ease of installation.

In March 2025, Johnson Controls, Inc. introduced a modular hydronic heating system, improving installation efficiency by 20% and reducing carbon emissions for sustainable building applications.

Products Covered:

Hydronic Boilers

Heat Pumps

Radiant Heating System

Chillers

Air Conditioning Units

Fancoils

AHU

Cooling Tower

Fuel Types Covered:

Natural Gas

Oil

Electricity

Biomass

End Users Covered:

Residential

Commercial

Industrial

Other End Users

Regions Covered:

North America

US

Canada

Mexico

Europe

Germany

UK

Italy

France

Spain

Rest of Europe

Asia Pacific

Japan

China

India

Australia

New Zealand

South Korea

Rest of Asia Pacific

South America

Argentina

Brazil

Chile

Rest of South America

Middle East & Africa

Saudi Arabia

UAE

Qatar

South Africa

Rest of Middle East & Africa

What our report offers:

- Market share assessments for the regional and country-level segments
- Strategic recommendations for the new entrants
- Covers Market data for the years 2024, 2025, 2026, 2028, and 2032
- Market Trends (Drivers, Constraints, Opportunities, Threats, Challenges, Investment Opportunities, and recommendations)
- Strategic recommendations in key business segments based on the market estimations
- Competitive landscaping mapping the key common trends
- Company profiling with detailed strategies, financials, and recent developments
- Supply chain trends mapping the latest technological advancements

Free Customization Offerings:

All the customers of this report will be entitled to receive one of the following free

Hydronic HVAC Systems Market Forecasts to 2032 – Global Analysis By Product (Hydronic Boilers, Heat Pumps, Rad...

customization options:

Company Profiling

Comprehensive profiling of additional market players (up to 3)

SWOT Analysis of key players (up to 3)

Regional Segmentation

Market estimations, Forecasts and CAGR of any prominent country as per the client's interest (Note: Depends on feasibility check)

Competitive Benchmarking

Benchmarking of key players based on product portfolio, geographical presence, and strategic alliances

Contents

1 EXECUTIVE SUMMARY

2 PREFACE

- 2.1 Abstract
- 2.2 Stake Holders
- 2.3 Research Scope
- 2.4 Research Methodology
 - 2.4.1 Data Mining
 - 2.4.2 Data Analysis
 - 2.4.3 Data Validation
 - 2.4.4 Research Approach
- 2.5 Research Sources
 - 2.5.1 Primary Research Sources
 - 2.5.2 Secondary Research Sources
 - 2.5.3 Assumptions

3 MARKET TREND ANALYSIS

- 3.1 Introduction
- 3.2 Drivers
- 3.3 Restraints
- 3.4 Opportunities
- 3.5 Threats
- 3.6 Product Analysis
- 3.7 End User Analysis
- 3.8 Emerging Markets
- 3.9 Impact of Covid-19

4 PORTERS FIVE FORCE ANALYSIS

- 4.1 Bargaining power of suppliers
- 4.2 Bargaining power of buyers
- 4.3 Threat of substitutes
- 4.4 Threat of new entrants
- 4.5 Competitive rivalry

5 GLOBAL HYDRONIC HVAC SYSTEMS MARKET, BY PRODUCT

- 5.1 Introduction
- 5.2 Hydronic Boilers
- 5.3 Heat Pumps
- 5.4 Radiant Heating System
- 5.5 Chillers
- 5.6 Air Conditioning Units
- 5.7 Fancoils
- 5.8 AHU
- 5.9 Cooling Tower

6 GLOBAL HYDRONIC HVAC SYSTEMS MARKET, BY FUEL TYPE

- 6.1 Introduction
- 6.2 Natural Gas
- 6.3 Oil
- 6.4 Electricity
- 6.5 Biomass

7 GLOBAL HYDRONIC HVAC SYSTEMS MARKET, BY END USER

- 7.1 Introduction
- 7.2 Residential
- 7.3 Commercial
 - 7.3.1 Healthcare Facilities
 - 7.3.2 Retail
 - 7.3.3 Restaurants & Hotels
- 7.4 Industrial
 - 7.4.1 Data Centers
 - 7.4.2 Manufacturing Plants
 - 7.4.3 Power & Utility Facilities
- 7.5 Other End Users

8 GLOBAL HYDRONIC HVAC SYSTEMS MARKET, BY GEOGRAPHY

- 8.1 Introduction
- 8.2 North America
 - 8.2.1 US

- 8.2.2 Canada
- 8.2.3 Mexico
- 8.3 Europe
 - 8.3.1 Germany
 - 8.3.2 UK
 - 8.3.3 Italy
 - 8.3.4 France
 - 8.3.5 Spain
 - 8.3.6 Rest of Europe
- 8.4 Asia Pacific
 - 8.4.1 Japan
 - 8.4.2 China
 - 8.4.3 India
 - 8.4.4 Australia
 - 8.4.5 New Zealand
 - 8.4.6 South Korea
 - 8.4.7 Rest of Asia Pacific
- 8.5 South America
 - 8.5.1 Argentina
 - 8.5.2 Brazil
 - 8.5.3 Chile
 - 8.5.4 Rest of South America
- 8.6 Middle East & Africa
 - 8.6.1 Saudi Arabia
 - 8.6.2 UAE
 - 8.6.3 Qatar
 - 8.6.4 South Africa
 - 8.6.5 Rest of Middle East & Africa

9 KEY DEVELOPMENTS

- 9.1 Agreements, Partnerships, Collaborations and Joint Ventures
- 9.2 Acquisitions & Mergers
- 9.3 New Product Launch
- 9.4 Expansions
- 9.5 Other Key Strategies

10 COMPANY PROFILING

- 10.1 AirFixture, LLC
- 10.2 Amuheat
- 10.3 B&H Industrial
- 10.4 Baxi North America
- 10.5 Bindus Manufacturing, LLC (AQUECOIL)
- 10.6 Danfoss A/S
- 10.7 Hurlcon Hydronic heating
- 10.8 Johnson Controls, Inc.
- 10.9 Mitsubishi Electric Hydronics & IT Cooling Systems S.p.A.
- 10.10 Oventrop (China) HVAC Systems Technology Co., Ltd
- 10.11 Rehau, Inc.
- 10.12 Schluter-Systems KG
- 10.13 Tamas Hydronic Systems, Inc.
- 10.14 Warmboard, Inc.
- 10.15 Watts Water Technologies, Inc.

List Of Tables

LIST OF TABLES

- 1 Global Hydronic HVAC Systems Market Outlook, By Region (2024-2032) (\$MN)
- 2 Global Hydronic HVAC Systems Market Outlook, By Product (2024-2032) (\$MN)
- 3 Global Hydronic HVAC Systems Market Outlook, By Hydronic Boilers (2024-2032) (\$MN)
- 4 Global Hydronic HVAC Systems Market Outlook, By Heat Pumps (2024-2032) (\$MN)
- 5 Global Hydronic HVAC Systems Market Outlook, By Radiant Heating System (2024-2032) (\$MN)
- 6 Global Hydronic HVAC Systems Market Outlook, By Chillers (2024-2032) (\$MN)
- 7 Global Hydronic HVAC Systems Market Outlook, By Air Conditioning Units (2024-2032) (\$MN)
- 8 Global Hydronic HVAC Systems Market Outlook, By Fancoils (2024-2032) (\$MN)
- 9 Global Hydronic HVAC Systems Market Outlook, By AHU (2024-2032) (\$MN)
- 10 Global Hydronic HVAC Systems Market Outlook, By Cooling Tower (2024-2032) (\$MN)
- 11 Global Hydronic HVAC Systems Market Outlook, By Fuel Type (2024-2032) (\$MN)
- 12 Global Hydronic HVAC Systems Market Outlook, By Natural Gas (2024-2032) (\$MN)
- 13 Global Hydronic HVAC Systems Market Outlook, By Oil (2024-2032) (\$MN)
- 14 Global Hydronic HVAC Systems Market Outlook, By Electricity (2024-2032) (\$MN)
- 15 Global Hydronic HVAC Systems Market Outlook, By Biomass (2024-2032) (\$MN)
- 16 Global Hydronic HVAC Systems Market Outlook, By End User (2024-2032) (\$MN)
- 17 Global Hydronic HVAC Systems Market Outlook, By Residential (2024-2032) (\$MN)
- 18 Global Hydronic HVAC Systems Market Outlook, By Commercial (2024-2032) (\$MN)
- 19 Global Hydronic HVAC Systems Market Outlook, By Healthcare Facilities (2024-2032) (\$MN)
- 20 Global Hydronic HVAC Systems Market Outlook, By Retail (2024-2032) (\$MN)
- 21 Global Hydronic HVAC Systems Market Outlook, By Restaurants & Hotels (2024-2032) (\$MN)
- 22 Global Hydronic HVAC Systems Market Outlook, By Industrial (2024-2032) (\$MN)
- 23 Global Hydronic HVAC Systems Market Outlook, By Data Centers (2024-2032) (\$MN)
- 24 Global Hydronic HVAC Systems Market Outlook, By Manufacturing Plants (2024-2032) (\$MN)
- 25 Global Hydronic HVAC Systems Market Outlook, By Power & Utility Facilities (2024-2032) (\$MN)
- 26 Global Hydronic HVAC Systems Market Outlook, By Other End Users (2024-2032)

(\$MN)

Note: Tables for North America, Europe, APAC, South America, and Middle East & Africa Regions are also represented in the same manner as above.

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