

Underfloor Heating Market ? Global Industry Size, Share, Trends, Opportunity, and Forecast, Segmented By Type (Hydronic Underfloor Heating Vs Electric Underfloor Heating), By Component (Heating Cables, Heating Mats, Sensor & Thermostat, Heating Pipes & Manifolds), By Installation Type (New Installations, Retrofit Installations), By Application (Commercial, Residential, Entertainment, Industrial, Healthcare & Education), By Region & Competition, 2021-2031F

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Abstracts

The Global Underfloor Heating Market is projected to expand from USD 5.57 Billion in 2025 to USD 8.32 Billion by 2031, reflecting a compound annual growth rate of 6.92%. This heating technology manages indoor temperatures via conduction, radiation, and convection, utilizing hydronic piping or electrical elements embedded within floor structures. Growth is fundamentally driven by strict government mandates on carbon emissions, a rising preference for energy-efficient infrastructure, and the need for reliable thermal comfort in both residential and commercial projects. These core drivers underpin the industry's long-term expansion, operating independently of fleeting design trends or temporary technological fads.

Market growth is closely tied to the uptake of low-temperature heating sources, especially in areas with rigorous energy codes. As reported by the European Heat Pump Association, sales reached 2.2 million units across 14 major European nations in 2024, generating consistent demand for compatible systems like underfloor heating. However, despite this positive momentum, the market faces notable obstacles in the renovation sector. High installation expenses and limitations regarding structural floor

height frequently make retrofitting existing properties difficult, impeding widespread implementation compared to the new development sector.

Market Driver

The rising volume of global residential and commercial construction serves as a major engine for underfloor heating adoption, particularly in new builds where embedding the system is most economical. Contemporary building codes increasingly favor these installations because they offer even heat distribution without reducing usable wall space, a critical factor in modern architectural design. This ongoing development ensures a reliable pipeline of projects separate from the complexities of retrofitting. For instance, the U.S. Census Bureau's "Monthly New Residential Construction, October 2024" report noted that privately-owned housing starts reached a seasonally adjusted annual rate of 1,311,000 in November 2024, highlighting a substantial number of new properties ready for integrated heating systems.

Concurrently, the push for energy-efficient heating, reinforced by strict government policies, is fundamentally reshaping the market landscape. As countries move away from fossil fuels, there is a marked transition toward low-temperature technologies like heat pumps, which function optimally with the extensive surface area provided by underfloor systems. This trend is supported by strong participation in incentive programs; the Department for Energy Security and Net Zero reported in September 2024 that the "Boiler Upgrade Scheme" received 2,890 applications in August 2024—more than double the previous year's figure. Furthermore, Danfoss reported in 2024 that full-year 2023 sales grew by 7% in local currency, a success attributed to aggressive investments in green energy and efficiency strategies.

Market Challenge

Installing underfloor heating in existing buildings creates a significant hurdle for market growth due to the complexities involved in retrofitting. In many renovation scenarios, fixed structural elements restrict installation choices, as adding electrical elements or hydronic pipes can cause issues with floor height buildup. These projects often require extensive modifications, such as leveling subfloors, trimming doors, or adjusting skirting boards, which drastically increase material and labor costs. Consequently, these financial and technical demands often make the technology less viable for homeowners compared to maintaining traditional radiator systems.

As a result, the market struggles to expand into the large inventory of existing homes,

restricting its primary growth largely to the new construction sector. This reliance renders the industry susceptible to downturns in the general renovation market caused by economic strain. The effect of such limitations was highlighted by the Construction Products Association in 2024, which reported a 4.0 percent decline in private housing repair, maintenance, and improvement output as homeowners deferred expensive renovations. This contraction in remodeling activity directly reduces opportunities for retrofitting capital-intensive heating systems, thereby slowing overall market momentum.

Market Trends

The incorporation of IoT home automation and smart thermostats is significantly changing how underfloor heating systems are controlled and utilized. These advanced interfaces go beyond basic temperature adjustments, allowing users to connect floor heating with comprehensive smart home networks for remote monitoring, precise zoning, and automated energy efficiency. This shift is fueled by consumer demand for convenience and detailed control, moving the industry's focus from hardware installation toward software-driven thermal comfort. The financial success of this trend is evident in Resideo Technologies' "Third Quarter 2025 Financial Results" from November 2025, which reported a record gross margin of 29.8% and a 2% revenue rise, driven by robust sales of their connected thermostat lines.

At the same time, the development of dry-install and low-profile retrofit solutions is providing a vital technological answer to the structural constraints of existing buildings. Manufacturers are introducing dry-lay panels and ultra-thin mats that significantly reduce floor height buildup, directly overcoming the barriers that have historically hindered retrofitting. These innovations enable installation in renovation projects without requiring long screed drying times or major excavation, helping to detach the sector's growth from new construction trends. Demonstrating the demand for sustainable renovation products, Genuit Group reported in August 2025 that revenue in its Sustainable Building Solutions segment grew by 7.9% year-over-year, supported by the ongoing adoption of energy-efficient climate management systems.

Key Market Players

Siemens AG

Mitsubishi Electric Corporation

Pentair PLC

Honeywell International

Emerson Electric Co.

Robert Bosch

Uponor Corporation

Danfoss

Schneider Electric SE

Nexans S.A.

Report Scope

In this report, the Global Underfloor Heating Market has been segmented into the following categories, in addition to the industry trends which have also been detailed below:

Underfloor Heating Market, By Type

Hydronic Underfloor Heating Vs Electric Underfloor Heating

Underfloor Heating Market, By Component

Heating Cables

Heating Mats

Sensor & Thermostat

Heating Pipes & Manifolds

Underfloor Heating Market, By Installation Type

New Installations

Retrofit Installations

Underfloor Heating Market, By Application

Commercial

Residential

Entertainment

Industrial

Healthcare & Education

Underfloor Heating Market, By Region

North America

United States

Canada

Mexico

Europe

France

United Kingdom

Italy

Germany

Spain

Asia Pacific

China

India

Japan

Australia

South Korea

South America

Brazil

Argentina

Colombia

Middle East & Africa

South Africa

Saudi Arabia

UAE

Competitive Landscape

Company Profiles: Detailed analysis of the major companies present in the Global Underfloor Heating Market.

Available Customizations:

Global Underfloor Heating Market report with the given market data, TechSci Research offers customizations according to a company's specific needs. The following customization options are available for the report:

Company Information

Detailed analysis and profiling of additional market players (up to five).

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