

# **Hydronic Underfloor Heating Market - Global Industry Size, Share, Trends, Opportunity, and Forecast, 2018-2028 Segmented By Facility (Existing Buildings, New Buildings), By Application (Residential (Single Family, Multi Family), Commercial (Education, Healthcare, Retail, Transportation, Office, Hospitality)), By Region, By Competition**

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## **Abstracts**

Global Hydronic Underfloor Heating Market has valued at USD 8.08 billion in 2022 and is anticipated to project robust growth in the forecast period with a CAGR of 6.19% through 2028.

The Hydronic Underfloor Heating Market refers to the segment of the heating industry focused on the installation and distribution of heating systems that use water as a medium to warm residential and commercial spaces through underfloor pipes or tubing. This innovative heating method relies on a network of pipes, commonly made of PEX or PEX-AL-PEX, through which hot water is circulated to radiate heat evenly across floors, providing a comfortable and energy-efficient heating solution. This market has experienced substantial growth in recent years, driven by increasing awareness of its energy efficiency, superior heat distribution, and comfort benefits. Its appeal lies in its ability to efficiently and evenly heat spaces while saving energy and reducing heating costs. The hydronic underfloor heating market offers a range of solutions, including hydronic floor heating systems for various floor types, such as concrete, tile, or hardwood.

Factors such as a growing emphasis on energy-efficient building solutions, advancements in technology, and the desire for eco-friendly heating options have fueled

the expansion of this market. As consumers seek more sustainable and cost-effective heating solutions, the hydronic underfloor heating market is poised for further growth and innovation in the coming years.

## Key Market Drivers

### Energy Efficiency and Environmental Concerns

Energy efficiency and environmental sustainability have become paramount concerns in the construction and heating industry, driving the global hydronic underfloor heating market. As governments and consumers alike become increasingly aware of the need to reduce energy consumption and greenhouse gas emissions, they are seeking more energy-efficient heating solutions. Hydronic underfloor heating systems are recognized for their superior efficiency compared to traditional heating methods. These systems operate at lower water temperatures, reducing energy consumption and operating costs. By evenly distributing heat across a room's entire floor, they minimize heat loss and maintain a comfortable temperature, further enhancing their energy efficiency. Additionally, hydronic systems can be easily integrated with renewable energy sources like solar panels and heat pumps, aligning with the growing trend towards green building practices and reducing carbon footprints.

### Growing Residential Construction

The global surge in residential construction is another significant driver of the hydronic underfloor heating market. Urbanization, population growth, and increased disposable income are leading to a rising demand for new homes and apartments. Homeowners are increasingly seeking modern and comfortable living spaces, which often include underfloor heating as a desirable feature. Hydronic systems offer an attractive solution for residential spaces due to their space-saving design, aesthetic appeal, and superior comfort. With more construction projects incorporating these systems as standard or optional features, the market for hydronic underfloor heating is poised for substantial growth.

### Advancements in Technology

Technological advancements play a pivotal role in driving the hydronic underfloor heating market forward. Innovations in system design, controls, and materials have made these systems more efficient, reliable, and user-friendly. For instance, smart thermostats and home automation systems enable users to precisely control and

schedule their heating, optimizing comfort and energy consumption. Furthermore, manufacturers are developing more compact and lightweight components, simplifying installation and reducing costs. Improved materials, such as advanced tubing and insulation, enhance the overall performance of these systems. These technological enhancements not only attract new consumers but also encourage existing users to upgrade their systems, further bolstering market growth.

### Retrofit Market Expansion

In addition to new construction, the retrofit market is expanding as more property owners seek to upgrade their existing heating systems. As awareness of the benefits of hydronic underfloor heating grows, property owners are increasingly willing to invest in retrofitting their homes or commercial spaces. This trend is driven by the desire to improve energy efficiency, reduce utility bills, and enhance indoor comfort. Manufacturers and service providers are capitalizing on this market by offering retrofit-friendly solutions that minimize installation disruptions. The versatility of hydronic systems allows for installation in existing buildings with minimal structural modifications, making them an attractive option for retrofit projects.

### Health and Comfort Benefits

Hydronic underfloor heating systems offer notable health and comfort benefits, which are becoming more significant drivers in the market. Unlike traditional forced-air systems, which can stir up allergens and dust particles, hydronic systems do not rely on air circulation to distribute heat. This results in improved indoor air quality, making them particularly appealing to individuals with respiratory issues or allergies. Moreover, the even distribution of heat across the entire floor creates a more comfortable and consistent indoor environment. Cold spots and drafts are virtually eliminated, and the absence of radiators or vents allows for greater freedom in room layout and design. As people become more health-conscious and prioritize well-being, these benefits contribute to the growing popularity of hydronic underfloor heating systems.

### Government Incentives and Regulations

Government incentives and regulations are playing a pivotal role in promoting the adoption of hydronic underfloor heating systems. Many countries and regions are implementing energy-efficiency standards and policies that encourage the use of such systems. These incentives often include tax credits, rebates, or subsidies for the installation of energy-efficient heating systems. Additionally, building codes and

regulations are increasingly favoring energy-efficient and environmentally friendly solutions, which align with the characteristics of hydronic underfloor heating. Compliance with these standards is becoming mandatory, further driving the demand for these systems in both residential and commercial construction.

In conclusion, the global hydronic underfloor heating market is experiencing robust growth driven by factors such as energy efficiency, residential construction, technological advancements, retrofit opportunities, health and comfort benefits, and government incentives and regulations. As the world continues to prioritize sustainability and comfort, these drivers are likely to propel the market's expansion in the coming years.

## Government Policies are Likely to Propel the Market

### Energy Efficiency Standards and Incentives

Energy efficiency is a key priority for governments worldwide, and many have implemented policies to promote the adoption of energy-efficient heating systems like hydronic underfloor heating. These policies often include setting minimum energy performance standards for heating systems, which manufacturers must meet to sell their products in the market. Governments also offer various incentives to encourage consumers and businesses to choose energy-efficient heating options. These incentives can take the form of tax credits, rebates, grants, or subsidies for the purchase and installation of hydronic underfloor heating systems. These financial incentives help offset the initial cost, making these systems more accessible to a wider range of consumers. Additionally, governments may provide training and certification programs for installers to ensure the proper installation and maintenance of these systems, further supporting their energy efficiency goals.

### Renewable Energy Integration

To promote sustainability and reduce carbon emissions, many governments have policies in place to encourage the integration of renewable energy sources with heating systems, including hydronic underfloor heating. These policies incentivize the installation of solar panels, heat pumps, and other renewable energy technologies that can complement hydronic systems. In some regions, feed-in tariffs or net metering programs are offered to homeowners and businesses that generate excess renewable energy, allowing them to sell surplus energy back to the grid. This not only reduces energy bills but also promotes the use of clean energy sources in heating systems.

Additionally, governments may set targets and mandates for the percentage of renewable energy that must be used in heating applications, further driving the adoption of renewable-integrated hydronic underfloor heating systems.

### Building Codes and Regulations

Government policies related to building codes and regulations play a crucial role in the hydronic underfloor heating market. Many countries and regions have updated their building codes to include requirements for energy-efficient heating systems and sustainable building practices. These codes often specify the use of hydronic underfloor heating as a compliant option due to its energy efficiency and even heat distribution. Contractors and builders must adhere to these codes when constructing new buildings or renovating existing ones, ensuring the widespread adoption of these systems. Moreover, government agencies may conduct inspections and audits to verify compliance with these codes, helping to maintain the quality and performance of hydronic underfloor heating installations.

### Environmental Standards and Emissions Reduction

In line with global efforts to combat climate change, governments are implementing policies aimed at reducing carbon emissions from heating systems. Hydronic underfloor heating is seen as an eco-friendly option due to its energy efficiency, which leads to lower emissions. To encourage the use of such systems, governments may set emission reduction targets for heating technologies and establish penalties for non-compliance. They may also offer carbon credits or offsets to entities that choose hydronic underfloor heating as part of their emissions reduction strategies. Additionally, environmental labeling and certification programs may be introduced to help consumers identify heating products that meet specific sustainability criteria, further promoting the adoption of hydronic systems.

### Research and Development Funding

Governments often allocate funding for research and development (R&D) initiatives aimed at advancing heating technologies, including hydronic underfloor heating. These R&D programs support innovations in system design, materials, and controls, leading to more efficient and reliable systems. Funding may be provided to universities, research institutions, and private companies to conduct research on improving hydronic underfloor heating systems. This can result in the development of new technologies, such as smarter controls, better insulation materials, and enhanced tubing designs.

## Education and Awareness Campaigns

To inform consumers and industry professionals about the benefits of hydronic underfloor heating, governments may launch education and awareness campaigns. These campaigns provide information about the technology, its energy-saving advantages, and available incentives and rebates. Such initiatives may include workshops, seminars, online resources, and public outreach programs. By raising awareness about the benefits and accessibility of hydronic underfloor heating, governments help drive its adoption in both residential and commercial applications.

In conclusion, government policies play a significant role in shaping the global hydronic underfloor heating market. These policies promote energy efficiency, renewable energy integration, compliance with building codes, emissions reduction, R&D initiatives, and education and awareness campaigns. As governments continue to prioritize sustainability and energy efficiency, these policies will likely drive the market's growth in the coming years.

## Key Market Challenges

### Initial Cost and Installation Complexity

One of the primary challenges facing the global hydronic underfloor heating market is the relatively high initial cost and the complexity of installation compared to conventional heating systems. While hydronic underfloor heating offers numerous long-term benefits, such as energy efficiency and enhanced comfort, the upfront investment can be a deterrent for some consumers and builders. The installation process involves several steps, including laying the pipes or tubing within the floor structure, connecting them to a heat source, and integrating controls and thermostats. This complexity often requires specialized knowledge and skilled labor, which can increase installation costs. Additionally, retrofitting existing buildings with hydronic systems can be even more labor-intensive and expensive due to the need for structural modifications. The cost of materials, such as the piping, insulation, and heat source, can also contribute to the higher upfront expense of hydronic underfloor heating. While some governments offer incentives and rebates to offset these costs, the initial financial outlay can still be a barrier for budget-conscious consumers and builders. To address this challenge, manufacturers and policymakers need to work together to develop more cost-effective installation methods and materials. Simplified installation processes, standardized components, and increased competition in the market can help lower the initial cost,



making hydronic underfloor heating more accessible to a wider range of customers. Furthermore, education and awareness campaigns can inform potential users about the long-term energy savings and comfort benefits that offset the initial investment. By emphasizing the return on investment and durability of hydronic systems, these campaigns can help overcome the perception of high upfront costs.

## Retrofitting Existing Buildings

While hydronic underfloor heating is gaining popularity in new construction, retrofitting existing buildings poses a unique challenge to the market. Many older buildings were not designed with underfloor heating in mind, making the installation process more complicated and costly. Retrofitting typically requires removing existing flooring, which can disrupt occupants and add to the project's expense. Additionally, the structural and architectural constraints of older buildings may limit the installation options, potentially leading to compromises in system performance or aesthetics. The need for structural modifications, including raising floor heights to accommodate the heating system, can be a significant hurdle, especially in historical or heritage-listed buildings where alterations are subject to strict regulations. Moreover, retrofit projects may encounter challenges related to integrating hydronic underfloor heating with existing heating systems or radiators, as well as adapting the system to fit irregular room layouts. To address these challenges, manufacturers and installers must develop retrofit-friendly solutions that minimize disruption and reduce installation costs. This includes designing low-profile systems that require less floor height adjustment and offering innovative installation techniques. Collaboration between heating professionals and architects can help ensure that retrofit projects meet both aesthetic and performance requirements. Government incentives and subsidies specifically tailored to retrofitting existing buildings with hydronic underfloor heating can also encourage property owners to make the switch to more efficient and comfortable heating systems.

In conclusion, while hydronic underfloor heating offers significant advantages in terms of energy efficiency and comfort, challenges related to the initial cost and complexity of installation, particularly in retrofit projects, must be addressed for the market to continue its growth. Innovative solutions, standardized practices, and government support can help overcome these obstacles and further promote the adoption of hydronic underfloor heating worldwide.

## Segmental Insights

### Existing Buildings Insights

The Existing Buildings segment had the largest market share in 2022 & expected to maintain it in the forecast period. Existing buildings represent a vast market because there are already numerous homes, commercial spaces, and other structures in place. Many of these buildings were constructed with older, less energy-efficient heating systems. Property owners, including homeowners and commercial building managers, often seek cost-effective ways to upgrade their heating systems without the need for extensive construction or new builds. Hydronic underfloor heating systems offer an attractive retrofit solution because they can be installed without major disruptions to the existing structure. As energy efficiency becomes increasingly important for reducing utility bills and environmental impact, property owners of existing buildings are motivated to switch to more efficient heating solutions. Hydronic underfloor heating is known for its efficiency and ability to evenly distribute heat, which can lead to significant energy savings over time. This appeals to existing building owners looking to reduce operating costs and make their properties more sustainable. Hydronic underfloor heating provides superior comfort and aesthetic advantages over traditional heating systems. Retrofitting older buildings with these systems can enhance the overall living or working experience for occupants. The elimination of visible radiators or baseboard heaters creates more design flexibility and a cleaner, clutter-free look in interior spaces. In some regions, governments and local authorities have introduced incentives, rebates, or regulations encouraging the adoption of energy-efficient heating systems. These incentives often target existing buildings, where the potential for energy savings and emissions reduction is substantial. Such policies can stimulate the retrofit market for hydronic underfloor heating. In many regions, the market for hydronic underfloor heating has matured, making it easier for property owners to access products, services, and expertise for retrofit installations. Established suppliers and contractors are well-equipped to cater to the demand from existing buildings.

## Residential Insights

The Residential segment had the largest market share in 2022 and is projected to experience rapid growth during the forecast period. Comfort and aesthetics are top priorities for homeowners. Hydronic underfloor heating provides an exceptionally comfortable indoor environment by evenly distributing heat throughout the floors. This eliminates cold spots and creates a cozy atmosphere throughout the entire living space. Additionally, the absence of visible radiators or baseboard heaters enhances interior design possibilities, making it a favored choice among homeowners seeking both comfort and aesthetics. Energy efficiency is a key consideration for homeowners looking to reduce energy consumption and lower utility bills. Hydronic underfloor heating



systems are renowned for their efficiency. They operate at lower water temperatures than traditional radiators, which means they require less energy to maintain comfortable indoor temperatures. Over time, this can result in substantial cost savings for homeowners, especially in regions with cold winters. Hydronic underfloor heating systems have become more accessible and affordable for residential applications over the years. Homeowners have the option to retrofit their existing homes with these systems without major disruptions or extensive construction. Retrofitting appeals to those looking to upgrade their heating systems while retaining their current residences. As awareness of the benefits of hydronic underfloor heating has grown, it has gained popularity among homeowners. They recognize the advantages of this technology, such as energy efficiency, improved comfort, and design flexibility, leading to a higher adoption rate in residential settings. In regions experiencing residential construction booms, new homes are often equipped with modern heating systems like hydronic underfloor heating. As the housing market expands, so does the presence of these systems in newly constructed residential properties. Hydronic underfloor heating systems allow for precise temperature control and zoning. Homeowners can customize heating zones for different areas of their homes, further enhancing comfort and energy efficiency. Growing concern for environmental sustainability encourages homeowners to seek energy-efficient and eco-friendly heating options. Hydronic underfloor heating aligns with these environmental considerations, making it an attractive choice for those who want to reduce their carbon footprint.

## Regional Insights

North America had the largest market for hydronic underfloor heating in 2022. The growth of the market in North America is driven by the increasing demand for energy-efficient heating solutions and the growing popularity of smart homes. The US is the largest market for hydronic underfloor heating in North America, followed by Canada.

Europe had the second-largest market for hydronic underfloor heating in 2022. The growth of the market in Europe is driven by the increasing government support for the adoption of hydronic underfloor heating and the growing demand from commercial buildings. Germany is the largest market for hydronic underfloor heating in Europe, followed by the UK and France.

Asia Pacific had the third-largest market for hydronic underfloor heating in 2022. The growth of the market in Asia Pacific is driven by rising disposable incomes and the

increasing demand for comfortable and efficient heating solutions. China is the largest market for hydronic underfloor heating in Asia Pacific, followed by Japan and India.

#### Key Market Players

Uponor Corporation

Rehau AG

Warmup Plc

Daikin Industries Ltd

Viega LLC

Honeywell International Inc.

Amuheat

REHAU AG

Eberle by Schneider Electric

Mitsubishi Electric Corporation

#### Report Scope:

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

##### Hydronic Underfloor Heating Market, By Facility:

Existing Buildings

New Buildings

##### Hydronic Underfloor Heating Market, By Application:

## Residential

Single Family

Multi Family

## Commercial

Education

Healthcare

Retail

Transportation

Office

Hospitality

## Hydronic 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

Kuwait

Turkey

Competitive Landscape

Company Profiles: Detailed analysis of the major companies present in the Global

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Hydronic Underfloor Heating Market.

Available Customizations:

Global Hydronic Underfloor Heating market report with the given market data, Tech Sci 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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  - 14.8.3. Recent Developments
  - 14.8.4. Key Personnel/Key Contact Person



14.8.5. Key Product/Services Offered

14.9. Eberle by Schneider Electric

14.9.1. Business Overview

14.9.2. Key Revenue and Financials

14.9.3. Recent Developments

14.9.4. Key Personnel/Key Contact Person

14.9.5. Key Product/Services Offered

14.10. Mitsubishi Electric Corporation

14.10.1. Business Overview

14.10.2. Key Revenue and Financials

14.10.3. Recent Developments

14.10.4. Key Personnel/Key Contact Person

14.10.5. Key Product/Services Offered

## **15. STRATEGIC RECOMMENDATIONS**

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