

Asia Pacific District Heating Market Size and Forecast (2021 - 2031)

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Abstracts

The Asia Pacific District Heating Market is projected to grow significantly, reaching approximately US\$ 89,617.5 million by 2031, up from US\$ 58,361.1 million in 2024, with an estimated compound annual growth rate (CAGR) of 6.1% from 2025 to 2031.

Executive Summary and Market Analysis

The district heating market in the Asia Pacific region is divided into several key countries: China, India, Japan, Australia, South Korea, and the Rest of Asia Pacific. Notably, South Korea's Ministry of Trade, Industry, and Energy has set a goal to provide district heating to 4.46 million households by 2028, marking an increase of 680,000 units from 2023, which will account for 21.3% of total homes. This initiative is part of a broader governmental strategy to combat climate change by promoting energy-efficient and environmentally friendly heating solutions. District heating systems utilize waste heat from power plants, industries, and municipal waste incineration, thereby enhancing energy efficiency and reducing carbon emissions.

Strategic Insights

Market Segmentation Analysis

By Heat Source: The market is categorized into Coal, Natural Gas, Oil and Petroleum Products, and Others, with Coal holding the largest market share in 2024.

By Plant Type: The market is segmented into Boiler, Combined Heat and Power (CHP), and Others, where CHP leads in market share for 2024.

By Application: The market is divided into Residential, Commercial, and Industrial sectors, with Residential applications dominating in 2024.

Market Outlook

Cities and governments are increasingly focused on modernizing district heating networks to provide thermal energy to multiple buildings. The development of smart cities necessitates centralized heating systems that can generate, store, and efficiently distribute heat while minimizing energy loss. The rising energy demand and the need for effective heating solutions are driving significant investments in expanding district heating networks. For instance, India's National Geothermal Energy Policy 2025 advocates for the establishment of Fifth Generation District Heating and Cooling (5GDHC) systems powered by low-temperature geothermal energy, aligning with the country's Net Zero 2070 goals.

Investments in district heating infrastructure, including pipelines and power plants, will enable more households and businesses to access cost-effective and efficient heating solutions. The emphasis on reducing emissions and enhancing the efficiency of district heating networks is expected to create substantial growth opportunities in the market.

Country Insights

The Asia Pacific District Heating Market is further segmented by country, with China holding the largest market share in 2024. According to the World Nuclear Association, the Haiyang nuclear power plant in Shandong province has commenced its sixth heating season, expanding its coverage to approximately 13 million square meters. The government's commitment to expanding the nuclear distribution network is facilitating the integration of district heating systems, which support renewable energy generation and reduce reliance on fossil fuels. The district heating network is projected to provide significant heat output while saving substantial amounts of coal and reducing CO₂ emissions, thereby catering to the energy needs of millions in urban areas like Qingdao City.

Company Profiles

Key players in the Asia Pacific District Heating Market include Siemens AG, Veolia, ENGIE, Danfoss AS, Fortum Corp, Statkraft AS, Vattenfall AB, LOGSTOR Denmark

Holding ApS, Shinryo Corporation, and Vital Energi Ltd. These companies are pursuing various strategies such as expansion, product innovation, and mergers and acquisitions to enhance their market presence and offer innovative solutions to consumers.

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