

Middle East & Africa District Heating Market Size and Forecast (2021 - 2031)

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Abstracts

The District Heating Market in the Middle East and Africa is projected to grow significantly, reaching approximately US\$ 14,338.8 million by 2031, up from US\$ 10,722.0 million in 2024, with an estimated compound annual growth rate (CAGR) of 4.0% from 2025 to 2031.

Executive Summary and Market Analysis

The district heating market in the Middle East and Africa is categorized into several regions, including South Africa, Saudi Arabia, the UAE, and the broader Middle East and Africa. There is a substantial investment in clean energy production across the region, which is driving the demand for heating systems that utilize renewable energy sources. According to the World Energy Investment 2024 report, energy investments in the Middle East reached US\$ 175 billion in 2024, with clean energy comprising about 15% of this total. It is anticipated that clean energy investments will triple by 2030 compared to 2024 levels, with countries like Oman and the UAE aiming for net-zero emissions by 2050. The UAE has committed to a 19% reduction in emissions by 2030. Renewable energy sources such as wind and solar are being harnessed for clean energy generation, and district heating systems are being utilized to store excess energy through thermal energy storage solutions. This allows for the storage of surplus renewable energy as heat, which can be utilized during peak heating demand, ensuring a reliable energy supply and enhancing the efficiency of a clean energy grid.

Strategic Insights

Market Segmentation Analysis

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

By Plant Type: The market is divided into Boiler, Combined Heat and Power (CHP), and Others, with CHP leading in market share in 2024.

By Application: The market is segmented into Residential, Commercial, and Industrial, with the Industrial sector holding the largest share in 2024.

Market Outlook

Fifth-generation district heating and cooling (5GDHC) networks, also known as neutral loops, represent a new technology aimed at decarbonizing heat supply. These networks operate at lower temperatures (approximately 5-35 °C) and utilize heat pumps to connect buildings to a thermal loop, providing both heating and cooling. 5GDHC networks can leverage low-temperature and ambient heat sources, including heat from sewage, river or lake water, and near-surface geothermal energy. By integrating decentralized heat pumps, these networks closely link the electricity and heat sectors. If heat storage is incorporated, 5GDHC networks can enhance the flexibility of the electrical grid, making them a cost-effective alternative to traditional district heating systems. This trend is expected to gain traction during the forecast period.

Country Insights

The market is further segmented by country, including South Africa, Saudi Arabia, the UAE, and the Rest of Middle East and Africa, with Saudi Arabia holding the largest market share in 2024. The district heating market in Saudi Arabia is expanding rapidly due to the increasing demand for renewable energy and the government's commitment to expanding energy and power plant capacities. The World Energy Investment 2024 report indicates that Saudi Arabia plans to develop 130 GW of renewable capacity by 2030, alongside investments in projects like the Al Shuaibah solar plant, which will drive the demand for district heating networks that support renewable energy plants.

Company Profiles

Key players in the Middle East and Africa 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.

Contents

1. INTRODUCTION

- 1.1 Report Guidance
- 1.2 Market Segmentation

2. EXECUTIVE SUMMARY

- 2.1 Key Insights
- 2.2 Market Attractiveness

3. RESEARCH METHODOLOGY

- 3.1 Secondary Research
- 3.2 Primary Research
 - 3.2.1 Hypothesis formulation:
 - 3.2.2 Macroeconomic factor analysis:
 - 3.2.3 Developing base number:
 - 3.2.4 Data Triangulation:
 - 3.2.5 Country-level data:

4. DISTRICT HEATING MARKET LANDSCAPE

- 4.1 Market Overview
- 4.2 PEST Analysis
 - 4.2.1 Threat of New Entrants:
 - 4.2.2 Threat of Substitutes:
 - 4.2.3 Bargaining Power of Buyers:
 - 4.2.4 Bargaining Power of Suppliers:
 - 4.2.5 Competitive Rivalry:
- 4.3 Ecosystem Analysis
 - 4.3.1 Raw Material Suppliers
 - 4.3.2 Manufacturers
 - 4.3.3 Distributors or Suppliers
 - 4.3.4 End-Use Industry
 - 4.3.5 List of Vendors in the Value Chain
- 4.4 Average Selling Price - 2024 (Unit: US\$/MWh)
- 4.5 Import Export Analysis, 2023 (Unit: US\$ Thousand)

4.6 ESG Outlook

5. MIDDLE EAST AND AFRICA DISTRICT HEATING MARKET - KEY MARKET DYNAMICS

5.1 Market Drivers

5.2 Market Restraints

5.3 Market Opportunities

5.4 Future Trends

5.5 Impact of Drivers and Restraints:

6. DISTRICT HEATING MARKET - MIDDLE EAST AND AFRICA MARKET ANALYSIS

6.1 Middle East and Africa District Heating Market Revenue (US\$ Million), 2024 - 2031

6.2 Middle East and Africa District Heating Market Forecast and Analysis

7. MIDDLE EAST AND AFRICA DISTRICT HEATING MARKET REVENUE ANALYSIS - BY HEAT SOURCE

7.1 Coal

7.1.1 Overview

7.1.2 Coal: Middle East and Africa District Heating Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)

7.2 Natural Gas

7.2.1 Overview

7.2.2 Natural Gas: Middle East and Africa District Heating Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)

7.3 Oil and Petroleum Products

7.3.1 Overview

7.3.2 Oil and Petroleum Products: Middle East and Africa District Heating Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)

7.4 Others

7.4.1 Overview

7.4.2 Others: Middle East and Africa District Heating Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)

8. MIDDLE EAST AND AFRICA DISTRICT HEATING MARKET REVENUE ANALYSIS - BY PLANT TYPE

8.1 Boiler

8.1.1 Overview

8.1.2 Boiler: Middle East and Africa District Heating Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)

8.2 Combined Heat and Power

8.2.1 Overview

8.2.2 Combined Heat and Power: Middle East and Africa District Heating Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)

8.3 Others

8.3.1 Overview

8.3.2 Others: Middle East and Africa District Heating Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)

9. MIDDLE EAST AND AFRICA DISTRICT HEATING MARKET REVENUE ANALYSIS - BY APPLICATION

9.1 Residential

9.1.1 Overview

9.1.2 Residential: Middle East and Africa District Heating Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)

9.2 Commercial

9.2.1 Overview

9.2.2 Commercial: Middle East and Africa District Heating Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)

9.3 Industrial

9.3.1 Overview

9.3.2 Industrial: Middle East and Africa District Heating Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)

10. MIDDLE EAST AND AFRICA DISTRICT HEATING MARKET - COUNTRY ANALYSIS

10.1 Middle East and Africa

10.1.1 Middle East and Africa District Heating Market Revenue and Forecast and Analysis - by Country

10.1.1.1 Middle East and Africa District Heating Market Revenue and Forecast and Analysis - by Country

10.1.2.2 South Africa: Middle East and Africa District Heating Market - Revenue and

Forecast, 2021 - 2031 (US\$ Million)

10.1.2.2.1 South Africa: Middle East and Africa District Heating Market Share - by Heat Source

10.1.2.2.2 South Africa: Middle East and Africa District Heating Market Share - by Plant Type

10.1.2.2.3 South Africa: Middle East and Africa District Heating Market Share - by Application

10.2.3.3 Saudi Arabia: Middle East and Africa District Heating Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)

10.2.3.3.1 Saudi Arabia: Middle East and Africa District Heating Market Share - by Heat Source

10.2.3.3.2 Saudi Arabia: Middle East and Africa District Heating Market Share - by Plant Type

10.2.3.3.3 Saudi Arabia: Middle East and Africa District Heating Market Share - by Application

10.3.4.4 United Arab Emirates: Middle East and Africa District Heating Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)

10.3.4.4.1 United Arab Emirates: Middle East and Africa District Heating Market Share - by Heat Source

10.3.4.4.2 United Arab Emirates: Middle East and Africa District Heating Market Share - by Plant Type

10.3.4.4.3 United Arab Emirates: Middle East and Africa District Heating Market Share - by Application

10.4.5.5 Rest of Middle East and Africa: Middle East and Africa District Heating Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)

10.4.5.5.1 Rest of Middle East and Africa: Middle East and Africa District Heating Market Share - by Heat Source

10.4.5.5.2 Rest of Middle East and Africa: Middle East and Africa District Heating Market Share - by Plant Type

10.4.5.5.3 Rest of Middle East and Africa: Middle East and Africa District Heating Market Share - by Application

11 COMPETITIVE LANDSCAPE

11.1 Heat Map Analysis by Key Players

11.2 Company Positioning & Concentration

12 INDUSTRY LANDSCAPE

- 12.1 Overview
- 12.2 New Product Development
- 12.3 Merger and Acquisition
- 12.4 Other Strategic Developments

13 COMPANY PROFILES

13.1 Siemens AG

- 13.1.1 Key Facts
- 13.1.2 Business Description
- 13.1.3 Products and Services
- 13.1.4 Financial Overview
- 13.1.5 SWOT Analysis
- 13.1.6 Key Developments

13.2 Veolia

- 13.2.1 Key Facts
- 13.2.2 Business Description
- 13.2.3 Products and Services
- 13.2.4 Financial Overview
- 13.2.5 SWOT Analysis
- 13.2.6 Key Developments

13.3 ENGIE

- 13.3.1 Key Facts
- 13.3.2 Business Description
- 13.3.3 Products and Services
- 13.3.4 Financial Overview
- 13.3.5 SWOT Analysis
- 13.3.6 Key Developments

13.4 Danfoss AS

- 13.4.1 Key Facts
- 13.4.2 Business Description
- 13.4.3 Products and Services
- 13.4.4 Financial Overview
- 13.4.5 SWOT Analysis
- 13.4.6 Key Developments

13.5 Fortum Corp

- 13.5.1 Key Facts
- 13.5.2 Business Description
- 13.5.3 Products and Services

- 13.5.4 Financial Overview
- 13.5.5 SWOT Analysis
- 13.5.6 Key Developments
- 13.6 Statkraft AS
 - 13.6.1 Key Facts
 - 13.6.2 Business Description
 - 13.6.3 Products and Services
 - 13.6.4 Financial Overview
 - 13.6.5 SWOT Analysis
 - 13.6.6 Key Developments
- 13.7 Vattenfall AB
 - 13.7.1 Key Facts
 - 13.7.2 Business Description
 - 13.7.3 Products and Services
 - 13.7.4 Financial Overview
 - 13.7.5 SWOT Analysis
 - 13.7.6 Key Developments
- 13.8 LOGSTOR Denmark Holding ApS
 - 13.8.1 Key Facts
 - 13.8.2 Business Description
 - 13.8.3 Products and Services
 - 13.8.4 Financial Overview
 - 13.8.5 SWOT Analysis
 - 13.8.6 Key Developments
- 13.9 Shinryo Corporation
 - 13.9.1 Key Facts
 - 13.9.2 Business Description
 - 13.9.3 Products and Services
 - 13.9.4 Financial Overview
 - 13.9.5 SWOT Analysis
 - 13.9.6 Key Developments
- 13.10 Vital Energi Ltd
 - 13.10.1 Key Facts
 - 13.10.2 Business Description
 - 13.10.3 Products and Services
 - 13.10.4 Financial Overview
 - 13.10.5 SWOT Analysis
 - 13.10.6 Key Developments

14. APPENDIX

14.1 About The Insight Partners

List Of Tables

LIST OF TABLES

Table 1. Middle East and Africa District Heating Market Segmentation

Table 2. List of Vendors

Table 3. Middle East and Africa District Heating Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)

Table 4. Middle East and Africa District Heating Market - Revenue and Forecast, 2021 - 2031 (US\$ Million) - by Heat Source

Table 5. Middle East and Africa District Heating Market - Revenue and Forecast, 2021 - 2031 (US\$ Million) - by Plant Type

Table 6. Middle East and Africa District Heating Market - Revenue and Forecast, 2021 - 2031 (US\$ Million) - by Application

Table 7. Middle East and Africa District Heating Market - Revenue and Forecast, 2021 - 2031 (US\$ Million) - by Country

Table 8. South Africa: Middle East and Africa District Heating Market - Revenue and Forecast, 2021 - 2031 (US\$ Million) - by Heat Source

Table 9. South Africa: Middle East and Africa District Heating Market - Revenue and Forecast, 2021 - 2031 (US\$ Million) - by Plant Type

Table 10. South Africa: Middle East and Africa District Heating Market - Revenue and Forecast, 2021 - 2031 (US\$ Million) - by Application

Table 11. Saudi Arabia: Middle East and Africa District Heating Market - Revenue and Forecast, 2021 - 2031 (US\$ Million) - by Heat Source

Table 12. Saudi Arabia: Middle East and Africa District Heating Market - Revenue and Forecast, 2021 - 2031 (US\$ Million) - by Plant Type

Table 13. Saudi Arabia: Middle East and Africa District Heating Market - Revenue and Forecast, 2021 - 2031 (US\$ Million) - by Application

Table 14. United Arab Emirates: Middle East and Africa District Heating Market - Revenue and Forecast, 2021 - 2031 (US\$ Million) - by Heat Source

Table 15. United Arab Emirates: Middle East and Africa District Heating Market - Revenue and Forecast, 2021 - 2031 (US\$ Million) - by Plant Type

Table 16. United Arab Emirates: Middle East and Africa District Heating Market - Revenue and Forecast, 2021 - 2031 (US\$ Million) - by Application

Table 17. Rest of Middle East and Africa: Middle East and Africa District Heating Market - Revenue and Forecast, 2021 - 2031 (US\$ Million) - by Heat Source

Table 18. Rest of Middle East and Africa: Middle East and Africa District Heating Market - Revenue and Forecast, 2021 - 2031 (US\$ Million) - by Plant Type

Table 19. Rest of Middle East and Africa: Middle East and Africa District Heating Market

- Revenue and Forecast, 2021 - 2031 (US\$ Million) - by Application
Table 20. Heat Map Analysis by Key Players

List Of Figures

LIST OF FIGURES

Figure 1. Middle East and Africa District Heating Market Segmentation - Country

Figure 2. PEST Analysis

Figure 3. Ecosystem: District Heating Market

Figure 4. Middle East and Africa District Heating Market - Key Market Dynamics

Figure 5. Impact Analysis of Drivers and Restraints

Figure 6. Middle East and Africa District Heating Market Revenue (US\$ Million), 2024 - 2031

Figure 7. Middle East and Africa District Heating Market Share (%) - by Heat Source, 2024 and 2031

Figure 8. Coal: Middle East and Africa District Heating Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)

Figure 9. Natural Gas: Middle East and Africa District Heating Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)

Figure 10. Oil and Petroleum Products: Middle East and Africa District Heating Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)

Figure 11. Others: Middle East and Africa District Heating Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)

Figure 12. Middle East and Africa District Heating Market Share (%) - by Plant Type, 2024 and 2031

Figure 13. Boiler: Middle East and Africa District Heating Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)

Figure 14. Combined Heat and Power: Middle East and Africa District Heating Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)

Figure 15. Others: Middle East and Africa District Heating Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)

Figure 16. Middle East and Africa District Heating Market Share (%) - by Application, 2024 and 2031

Figure 17. Residential: Middle East and Africa District Heating Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)

Figure 18. Commercial: Middle East and Africa District Heating Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)

Figure 19. Industrial: Middle East and Africa District Heating Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)

Figure 20. Middle East and Africa District Heating Market Breakdown by Key Countries, 2024 and 2031 (%)

Figure 21. South Africa: Middle East and Africa District Heating Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)

Figure 22. Saudi Arabia: Middle East and Africa District Heating Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)

Figure 23. United Arab Emirates: Middle East and Africa District Heating Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)

Figure 24. Rest of Middle East and Africa: Middle East and Africa District Heating Market - Revenue and Forecast, 2021 - 2031 (US\$ Million)

Figure 25. Company Positioning & Concentration

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