

# North America District Heating Market Size and Forecast (2021 - 2031)

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## Abstracts

The North America District Heating Market is projected to grow from US\$ 32,743.8 million in 2024 to US\$ 47,796.0 million by 2031, reflecting a compound annual growth rate (CAGR) of 5.3% from 2025 to 2031.

## Executive Summary and Market Analysis

The district heating market in North America is divided into three main regions: the United States, Canada, and Mexico. The increasing demand for sustainable and eco-friendly energy solutions, along with a heightened focus on decarbonization, is driving the adoption of district heating systems. These systems are effective in generating and distributing energy while significantly reducing carbon emissions. For example, a report by the Aluminum Association titled "Pathways to Decarbonization: A North American Aluminum Roadmap," published in May 2024, outlines plans to cut aluminum production emissions by 24% by 2030, 63% by 2040, and 92% by 2050. The aluminum sector, known for its high emissions from smelting, can benefit from district heating by utilizing waste heat, thus minimizing energy consumption and emissions.

The demand for efficient systems that reduce environmental impact is growing across residential, industrial, and commercial sectors. Data from the Air-Conditioning, Heating, and Refrigeration Institute indicates that heat pump sales surged by 37% from November 2023 to November 2024. Heat pumps, which transfer heat from natural sources (air, water, or earth) to buildings, help decrease reliance on traditional fossil fuel heating methods. Integrating heat pumps with district heating systems enhances the generation and distribution of renewable energy, contributing to lower carbon emissions and sustainability goals. Consequently, the demand for energy-efficient technologies such as heat pumps, boilers, and combined heat and power (CHP) systems is

propelling the growth of the district heating market in North America.

## Strategic Insights

### Market Segmentation Analysis

**By Heat Source:** The market is categorized 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, and Others, where Combined Heat and Power dominated in 2024.

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

## Market Outlook

District heating plants, including boilers and combined heat and power (CHP) systems, are essential for the centralized generation and distribution of heat (typically as hot water or steam) to various buildings through a network of insulated pipes. According to the International Energy Agency (IEA), global energy demand is rising due to increased electricity consumption and the growing supply of renewables and natural gas. In 2024, global energy consumption rose by 2.2%, outpacing the average annual growth of 1.3% from 2013 to 2023. The scalability of district heating solutions makes them particularly suitable for densely populated urban areas, providing a reliable heat supply while minimizing energy waste. The increasing demand for sustainable solutions and rising energy consumption are driving the adoption of district heating systems across residential, commercial, and industrial sectors, promoting optimal energy use and reducing greenhouse gas emissions.

## Country Insights

The North America District Heating Market is further segmented by country into the United States, Canada, and Mexico, with the United States holding the largest market share in 2024. The push for high-efficiency heat pumps to reduce greenhouse gas emissions is a key factor in the adoption of district heating systems in the US. For instance, in December 2024, Mitsubishi Electric Corporation announced a US\$ 143.5

million investment to retrofit a factory for the production of variable-speed compressors, crucial for high-efficiency heat pumps. This initiative is expected to commence production in October 2027, with an annual output of 1,000,000 compressors, supporting the reduction of emissions in manufacturing.

### **Company Profiles**

Key players in the North America 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 employing 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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