

Underfloor Heating Market Size and Forecasts (2020 - 2030), Global and Regional Share, Trends, and Growth Opportunity Analysis Report Coverage: By Type (Hydronic System Components and Electric System Components); Installation (Retrofit and New), Application (Residential and Commercial)

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Abstracts

The Underfloor Heating Market size is expected to reach US\$ 6.95 billion by 2030 from 3.90 billion in 2022, at an estimated CAGR of 7.5% from 2022 to 2030.

The North American Underfloor Heating market is segmented into the US, Canada, and Mexico. Increased demand for underfloor heating in North America's cold zones is predicted as a result of the building & construction industry's rapid rise in developed nations such as the US, Canada, and Mexico. Moreover, various players across the region are providing underfloor heating in response to the comfort and convenience in the kitchens and bathrooms by providing warm floor. In February 2020, Mysa Smart Thermostats, a Newfoundland-based smart-home tech company, announced the launch of Electric In-underfloor heating. The launched product provides households across North America with greater control over their electricity bills by helping them use energy more efficiently.

The North American climate is known to be intensely cold, and the regions extreme polar location such as Alaska (USA), Northern Canada and Greenland, is colder. Thus, the people located in the region need warmth in winter. The governors of 25 states of US formed a coalition in order to reach 20 million deployed heat pumps by 2030. In response, 4.8 million heat pumps were installed in the US in 2020. Heat pumps are energy efficient and act as replacements for fossil fuel-powered furnaces and air

conditioners. They use electricity to transfer heat, as opposed to generating heat, and they can either heat a building when it is cold outside or cool a building when it is hot outside. Compared to a gas boiler, heat pumps reduce greenhouse gas emissions by 20% and are also energy efficient. The governors of the states are focusing on the sustainable heating of the residents along with the focus on greenhouse gas emissions. The underfloor heating connected to a boiler or heat pump is a convenient option. Thus, the government initiatives and cold climate across North America will propel the growth of the underfloor heating market.

The US construction industry is growing significantly. The US Census Bureau announced that construction expenditure in October 2023 was at a seasonally adjusted annual rate of US\$ 2,027.1 billion, 0.6 % (± 1.0 %) above the revised September estimation of US\$ 2,014.7 billion. Residential construction was at a seasonally adjusted annual rate of US\$ 884.4 billion in October 2023, 1.2 percent (± 1.3 %) above the revised September estimate of US\$ 873.6 billion. The residential sector accounts for a significant market share of the underfloor heating market due to people's growing inclination toward a better standard of living. Underfloor heating is seen as a luxury amenity that can add value to a home. Homebuyers are increasingly willing to pay more for homes that have underfloor heating, as it provides a more comfortable and even heat distribution inside the home. Thus, growth in residential construction and improved standard of living propel the growth of the underfloor heating market.

Based on type, the Underfloor Heating market is segmented into hydronic system components and electric system components. Underfloor heating solutions have emerged as a game-changer, providing unparalleled comfort and energy efficiency. One crucial aspect that ensures the smooth functioning of underfloor heating systems is the hydronic system component. These components play a pivotal role in delivering optimal performance and maintaining a cozy atmosphere in homes, offices, and various commercial spaces. Hydronic system components play a crucial role in the underfloor heating market, providing efficient, reliable, and customizable heating solutions. With advancements in technology, these components have become increasingly sophisticated, offering enhanced control, energy efficiency, and ease of installation. These systems are more efficient to use when applicable for large spaces. Though the initial cost of installation may be more the running costs for hydronic systems is economical when installed for long terms. Key components of the hydronic system include:

Boiler: The heart of any hydronic underfloor heating system is the boiler. This device is responsible for heating the water that circulates through the system.

Pump: Pumping the heated water throughout the underfloor heating system is the task performed by the circulation pump.

Manifold: The manifold acts as the central distribution point for the heated water. It receives hot water from the boiler and distributes it to individual zones or rooms.

Thermostats: Temperature control is a crucial aspect of underfloor heating systems. Thermostats regulate the heat output and ensure that the desired temperature is achieved and maintained.

Pipes and Manifolds: The underfloor heating system relies on a network of pipes and manifolds to distribute the heated water evenly across the floor.

Heat Exchanges: In larger underfloor heating systems, heat exchangers are employed to transfer heat from the primary heat source, such as a boiler, to the secondary water loop that circulates through the underfloor pipes.

Based on installation, the Underfloor Heating market is segmented into Retrofitting underfloor heating can be an attractive option for renovation projects. The increasing renovation activities across the globe drives the segment. Underfloor heating (UFH) has emerged as the preferred choice for self-build projects, offering simplicity, effectiveness, cost-efficiency, and a sense of luxury. Incorporating UFH into new construction projects is straightforward and adds value to the property. The retrofit approach offers a practical and cost-effective solution for property owners who wish to upgrade their heating systems without the need for extensive renovations or modifications. By retrofitting systems in underfloor heating market, individuals can enjoy the benefits of enhanced comfort, energy efficiency, and precise temperature control. Unlike new installations, retrofitting systems in underfloor heating market requires careful planning and consideration of various factors, such as the existing floor structure, insulation, and available space. The installation process typically involves laying heating elements, such as electric mats or water pipes, beneath the existing flooring surface. Retrofitting systems in underfloor heating market can be done in various types of buildings, including residential properties, commercial spaces, and public facilities.

Danfoss, Emerson Electric Co., nVent, Uponor Corporation, REHAU Ltd., Resideo Technologies Inc., Watts, Schneider Electric, Robert Bosch GmbH, and Daikin are

among the key Underfloor Heating Market players that are profiled in this market study.

The overall Underfloor Heating Market size has been derived using both primary and secondary sources. Exhaustive secondary research has been conducted using internal and external sources to obtain qualitative and quantitative information related to the Underfloor Heating Market size. The process also helps obtain an overview and forecast of the market with respect to all the market segments. Also, multiple primary interviews have been conducted with industry participants to validate the data and gain analytical insights. This process includes industry experts such as VPs, business development managers, market intelligence managers, and national sales managers, along with external consultants such as valuation experts, research analysts, and key opinion leaders, specializing in the Underfloor Heating Market.

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