

IC Market Tracking®

Underfloor Heating

Europe Top 13 2025



What Do You Get - Your Benefits at a Glance

Content of the Report

Market Data, Insights and Expertise...



MARKET ANALYSIS

- Historical market data from 2022 to 2024 for the total market development as well as
 - Regions
 - Floor Heating Systems
 - Distribution Channels
 - Customer Segments
 - Business Segments
- Forecasts for 2025e to 2028f for the market as a whole and for each region and segment analyzed.
- Annually updates of the data

COMPETITION ANALYSIS

- Market shares of the most important players for 2023-2024 in the total market for the respective product groups (heating elements: panels, pipes, insulation materials, heating cables, heating mats, fastening materials and heat transfer plates; control elements: control systems, manifolds, sensors and valves)

MARKET DRIVERS

- Analysis of the most relevant market drivers such as GDP, disposable incomes, public spending, labor market, demographics, etc.
- Continuous updates of the data



Market & Competition Analysis

Market Volume

Market Growth

Trends

Market Shares

What Do You Get - Your Benefits at a Glance

Presentation of the Data and Deliverables

Market Intelligence Tool Access and Deliverables

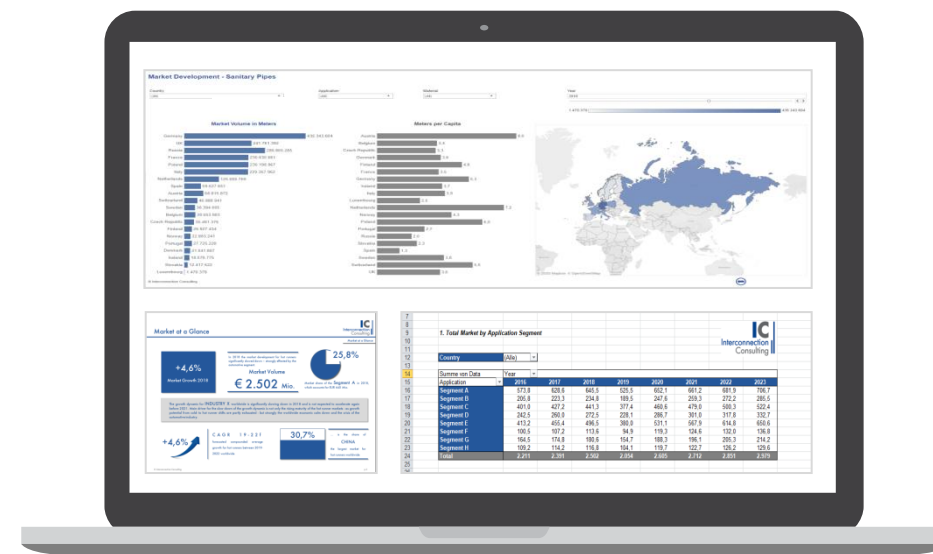


ONLINE-COCKPITS

- Online Dashboard-Tool including all data of the report enabling your individual and specific analysis
- User-friendly and intuitive operation of the dashboards
- Online access to the dashboards with all devices (PC, Laptops, Smartphone, Tablet, ...) everywhere, every time
- Download and extract of the data from the dashboards

EXECUTIVE REPORTS

- Infographics summarizing the market and providing regional comparisons and contrasts
- Executive Summary dashboards can easily be exported to individual executive reports as PDF



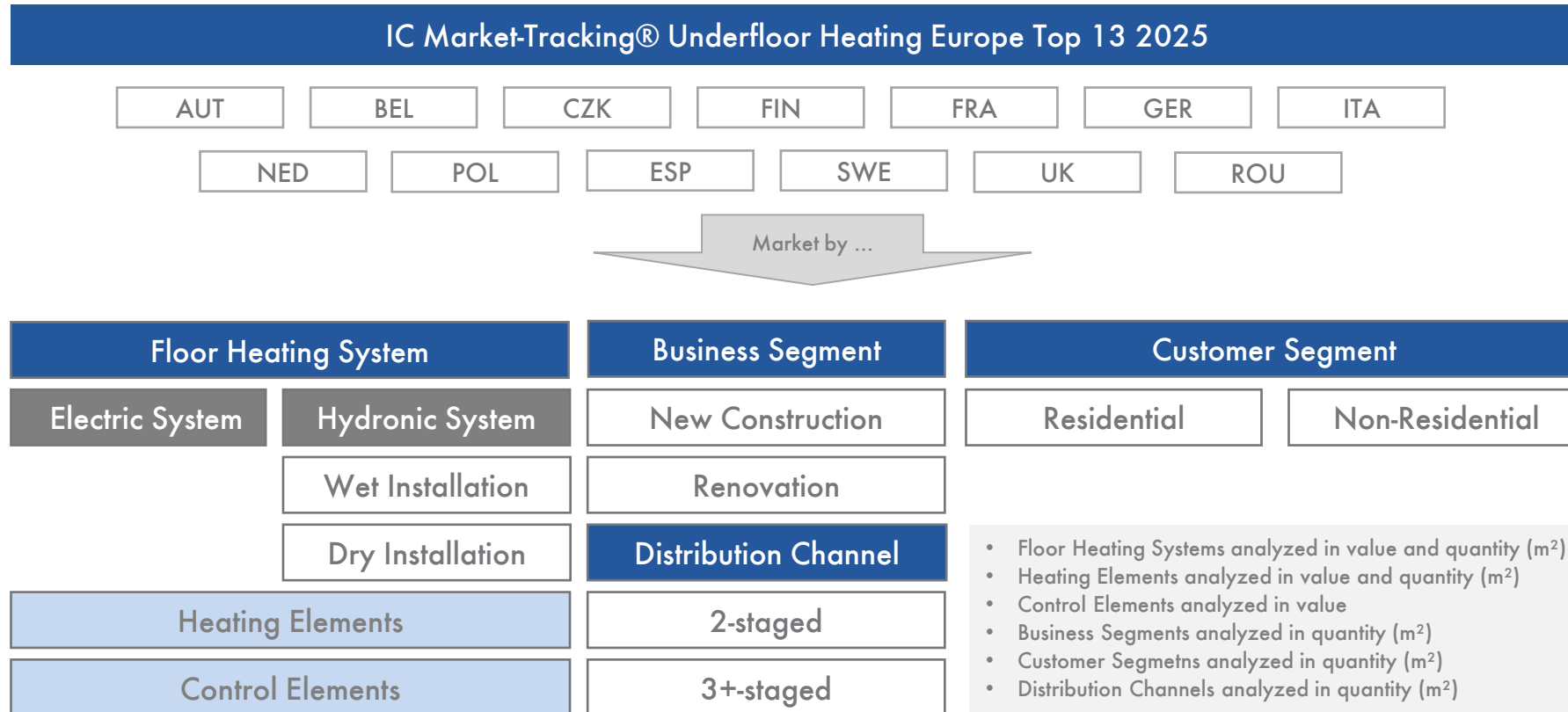
Market Intelligence Tool and Reports



Online-Dashboards

Executive Summary

Market Structure - Total Market



The study covers the total market and the development from 2022 to 2028f for each segment. Market shares of the top players are presented for the components of underfloor heating systems for 2023 and 2024.

Market Structure - Total Market - Interpretation

IC MarketTracking® Underfloor Heating Europe Top 13 2025



Market by ...

Floor Heating System		Business Segment	Customer Segment	
Electric System	Hydronic System	New Construction	Residential	Non-Residential
	Wet Installation	Renovation		
	Dry Installation	Distribution Channel		
Heating Elements		2-staged		
Control Elements		3+-staged		

The study covers the total market and the development from 2022 to 2028f for each segment. Market shares of the top players are presented for the components of underfloor heating systems for 2023 and 2024.

- Floor Heating Systems analyzed in value and quantity (m²)
- Heating Elements analyzed in value and quantity (m²)
- Control Elements analyzed in value
- Business Segments analyzed in quantity (m²)
- Customer Segments analyzed in quantity (m²)
- Distribution Channels analyzed in quantity (m²)

- Market data containing the market development is available for each country separately as well as aggregated for the acquired country package.
- Each country report contains data for the two different underfloor heating types (hydronic: wet and dry installation, and electric, additionally subdivided into heating and control elements) and separately as well as aggregated for the total underfloor heating market in terms of value and volume.
- Each country report contains data for the different types of distribution channels, business segments and customer segments separately as well as aggregated for the overall underfloor heating market
- Market shares of the companies are presented in the competitive analysis overall by quantity and value, as well as by product group (heating elements: panels, pipes, insulation materials, heat transfer plates, heating cables, heating mats and fastening materials; control elements: control systems, manifolds, sensors, valves)

Definitions and Demarcation – Total Market I

Floor Heating System	
Hydronic System	Hydronic heating where hot water flows through pipes heat a specific area
Electric System	Electric heating with flexible heating elements including cables, pre-formed cable mats, bronze mesh, carbon films, etc.
Wet Installation	Underfloor heating systems that are installed in the screed
Dry Installation	Underfloor heating systems that are installed under the floor cover, but not in the screed
Heating Elements	Including panels, pipes, insulation materials, heating cables, heating mats, fastening materials and heat transfer plates
Control Elements	Including control systems, manifolds, valves and sensors

Definitions and Demarcation – Total Market II

Customer Segment

Residential

Underfloor heating systems that are installed in buildings for housing like one- and two family houses and multi-storey buildings with dwellings in them

Non-Residential

Underfloor heating systems that are installed in buildings for commercial purpose such as offices, shops, restaurants as well as buildings for education, administration, etc.

Business Segment

New Construction

Underfloor heating systems that are installed in newly constructed buildings

Renovation

Underfloor heating systems that are installed in existing buildings during renovations or replacing older systems

Distribution Channel

2-staged

Sale of components for underfloor heating systems to installers who resell them to end users as part of the installation process

3+-staged

All forms of trade in which components for underfloor heating systems are bought and sold by at least two intermediaries

Definitions and Demarcation – Competition Analysis I

Floor Heating System	
Heating Elements	
Panels	Studded, staple and polystyrene panels, pipe support and Velcro mats (quantity in square meters, value in euros)
Pipes	Plastic, multilayer, and metal pipes (quantity in meter, value in euros)
Insulation Materials	Insulation mats and films (quantity in square meters, value in euros)
Heating Cables	Heating Cables for Electric Underfloor Heating Systems (quantity in square meters, value in euros)
Heating Mats	Heating Mats for Electric Underfloor Heating Systems (quantity in square meters, value in euros)
Fastening Materials	Clamps, wires, screws, brackets, rings, sleeves and push-fit connectors (value in euros)
Heat Transfer Plates	Heat transfer plates ensure that the heat generated by the pipes is distributed evenly over the floor surface (value in euros)

Definitions and Demarcation – Competition Analysis II

Floor Heating System	
Control Elements	Value in Euro
Control Systems	Room controllers, thermostats, actuators
Manifolds	Manifolds including distribution box
Sensors	Temperature sensors, flow meters, etc.
Valves	Thermostatic valves, fine-tuning valves, etc.

The Unique Mix of Methods and Approaches for Reliable Market Analysis



SELL-IN Data

The analysis measures Sell-In data. Sales from the manufacturer to the first distribution partner. OEMs are not taken into account.



Survey with Manufacturer & Experts

Basis of the analysis are surveys - electronic questionnaires and telephone interviews - with the most important manufacturer as well as interviews with industry experts.



Market Calculation Model

Industry relevant market drivers are taken into account in a market calculation model to determine the total market volume and forecasts.

The strong focus on interviews within the industry is clearly our **USP**:
"Only who talks with the industry knows what's going on!"

Content of the Report

Overview of the Included Dashboards

EXECUTIVE SUMMARY

- Total Market Overview
- Summary of Trends on the total market as well as analyzed segments

TOTAL MARKET

- Total Market – Regional Comparison in terms of value and quantity
- Total Market Development by regions in terms of value and quantity

FLOOR HEATING SYSTEM

- Regional Comparison in terms of value and quantity
- Regional market development in terms of value and quantity
- Analysis of average prices per analysed segment and regional comparison

COMPETITION ANALYSIS

- Market shares of the top manufacturers of each product group of heating elements (panels, pipes, insulation materials, heating cables, heat transfer plates, heating mats and fastening materials)
- Market shares of the top manufacturers of each product group of control elements (control systems, manifolds, sensors and valves)

BUSINESS SEGMENT

- Regional Comparison in terms of value and quantity
- Regional market development by New Construction and Renovation

CUSTOMER SEGMENT

- Regional Comparison in terms of value and quantity
- Regional market development by residential and non- residential

DISTRIBUTION CHANNEL

- Regional Comparison in terms of value and quantity
- Regional market development by 2-staged and 3+-staged distribution

MARKET DRIVERS

- GDP, personal disposable income, private consumption, recorded unemployment
- Residential completions and permits for building types such as one/two family dwellings and flats

ADVANCED

- Regional comparison and market development of heating elements in terms of value and volume
- Analysis of average prices per analyzed heating element segment and regional comparison
- Regional comparison and market development of the control elements in terms of value

Investment Plan for Your Market Research

	Subscription *	Single Issue	Available Countries			
Single Country	€ 3.999,-	+25% for Single Issues	AUT	BEL	CZK	ESP
3 Countries	€ 9.500,-		FIN	FRA	GER	ITA
7 Countries	€ 21.998,-		NED	POL	ROU	SWE
All 13 Countries	€ 39.992,-		UK			



* **Subscription:** 25% price advantage compared to single issue. The subscription can be cancelled after two purchases of the study, but not later than 31st December In the year in which the last study has been received. If the subscription is not cancelled, it is automatically extended by one more year. The price is the individual price for each year. Price changes must be announced by Interconnection at least six weeks before 31st December.

In case of purchase exceeding € 5.000,- (net), the price of Tableau cockpit is included as well as for any subscription order exceeding 2 countries or regions. For all other options, license costs for Tableau cockpits are € 500,-/license

Selected References

„ IC reports are a very helpful direction sign for continuously changing markets.“

Mr. Bernd Blümmers

General Manager, Saint-Gobain Solar Systems Central Europe



Interconnection Provides Data for Corporate Decisions



Problem Solving Competence

We know the efficient tools to solve your problems/questions



International Focus

Offices in Vienna, Bratislava, Lviv and Buenos Aires



Industry Competence

Industry competence due to longtime experience and regularly conducted studies



Methodology Know- How

Variety of tools for different questions and market characteristics



Consulting – Strategy-Workshops

We support you deriving strategies and actions from the research results

Our Market-Intelligence Tools





Interconnection Consulting

Getreidemarkt 1, A-1060 Wien

Tel: +43 1 585 46 23

Fax: +43 1 585 46 23 - 30

info@interconnectionconsulting.com

www.interconnectionconsulting.com

Defining Growth Potential since 1998

Vienna | Oberstdorf | Bratislava | Buenos Aires



Andreas Kuballa

Senior Market Analyst

Tel: +43 1 585 46 23 - 68

kuballa@interconnectionconsulting.com

Let's stay connected

Yes, we would like to order the study
IC Market Tracking® Underfloor Heating Europe Top 13 2025

(Please, print out the order form and mark your desired products)

Please choose from the available countries

☐ Austria
☐ Belgium
☐ Czech Republic

☐ Finland
☐ France
☐ Germany
☐ Italy

☐ Netherlands
☐ Norway
☐ Poland

☐ Spain
☐ Sweden
☐ UK

- ☐ Subscription* Single Country - Price per Year EUR 3.999,-
☐ Subscription* 3 Countries - Price per Year EUR 9.500,-
☐ Subscription* 7 Countries - Price per Year EUR 21.998,-
☐ Subscription* All 13 Countries - Price per Year EUR 39.992,-

In case of interest for a single issue of the report, please contact the responsible analyst.
Andreas Kuballa – kuballa@interconnectionconsulting.com – Tel.: +43 1 585 46 23 - 68

Billing Address:
(please fill in the data completely)

Delivery Address:
(necessary if different from the billing address)

Company: _____
Name: _____
Address: _____
Post Code/Zip: _____
Country: _____
VAT identification number: _____
E-Mail: _____

Date

Name

Signature

***Subscription:**

The price is the individual price for at least two orders of the study (order year and the following year). Price changes must be announced by Interconnection at least six weeks before 31st December. The subscription can be cancelled after two purchases of the study, but not later than 31st December in the year in which the last study has been received. If the subscription is not cancelled, it is extended by one more year.

Terms of Payment

Payable on receipt of invoice without discount. Any disputes arising will be settled before a competent court of law in Vienna. We apply Austrian law. The report purchased is based on a specific methodology, which description is available for the customer on request and which fulfillment is the basis of this contract. We claim copyright protection for the work. Distribution to third parties, duplication, publication or revision, even in part, is not permitted. In case of violation the company or persons placing the order agrees to pay a contract penalty of one hundred thousand Euros in each case. All prices shown exclude sales tax. Interconnection reserves the right to use the clients' logo as reference until written revocation.