

Pumps Market - Global Outlook & Forecast 2022-2027

Market Report | 2022-07-06 | 321 pages | Arizton Advisory & Intelligence

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Report description:

The global pumps market is expected to grow at a CAGR of 4.14% during 2021-2027.

Pump demand is predicted to rise in developing nations as water supply investments expand. Water and wastewater infrastructure are also expected to grow in APAC, Middle East & Africa, and Latin America. As a result, additional investments in the water and wastewater sectors will open up opportunities in the global pumps market.

An increased capital investment expenditure in developing countries is expected to allow vendors to invest further in plant expansion and upgrading manufacturing plants. Increased growth in mining activities and production of mined materials in China, India, and other developing countries are projected to boost the output. Sales in the APAC region are expected to rely on capital expenditure by industries and construction projects. Strong aftermarket demand in the global mining market offers immense opportunities for the centrifugal pumps market.

Key Winning Strategies in the Global Pumps Market

- Access to water supply and sanitation in the water and wastewater industry is improving in developing countries. Also, old water facilities are getting replaced and upgraded in developed countries, increasing water management facilities' demands.
- Centrifugal pumps are expected to be widely used due to their varied pressure and load handling capacities, including the ability to process liquids with high solid content and comparatively low maintenance costs.
- The growing production in the chemical industry is expected to increase the demand for aftermarket products (parts and replacement parts)
- The demand for pumps from the oil and gas industry benefits oil and gas production across the globe. However, this will be offset by a dramatic decrease in oil prices in the short term.

MARKET TRENDS

High Demand for Water & Wastewater Treatment Plants

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As the water demand increases, the quantity of wastewater produced and the overall emission load are projected to grow worldwide. Therefore, policymakers across the globe have implemented stringent wastewater management strategies and legislation, particularly in the urban and industrial sectors. Also, the demand for water treatment plants in developing countries is projected to increase with growing environmental awareness and the increasing water shortage.

Market Opportunities: Rising Number of Modular Construction Projects

Prefabricated buildings, also known as prefab houses and constructed homes, are residences and commercial spaces that are built ahead of time in a warehouse, usually in pieces that can be easily transported and incorporated into the property. Established markets of North America and Europe expect to witness a high demand for prefabricated buildings during the forecast period since the commercial adoption of prefabricated construction has grown in several residential and commercial sectors, including hotels, resorts, spas, and sports clubs, among others. The surge in demand for prefabricated buildings is expected to fuel the demand for industrial pumps.

Market Drivers: Demand for Efficient and Advanced Pump Technology

Specialty and advanced technology such as remote monitoring facilities are expected to boost market growth. Pump manufacturers are undertaking a digital revolution by accepting IIoT, big data, and artificial intelligence. Supporting innovations and associated disruptive technologies offers a strategic edge for manufacturers. Several businesses, such as KSB, Sulzer, and Wilo, have built connected machines that allow real-time production line tracking, those further increases efficiency and minimizes downtime.

Challenges: Fluctuations in Raw Material Prices

Fluctuations in raw material prices on imposition or rise in tariffs, commodity shortages, or allocations have adversely affected the pumps market. Changes in currency exchange rates, net revenue risk, and operating margins of global manufacturers have emerged as significant challenges in the market. Raw materials, including steel, titanium, nickel, and petroleum-based products, are projected to observe price discrepancies, thereby emerging as a prime challenge.

SEGMENT ANALYSIS

The Centrifugal Pumps Market is expected to grow at a CAGR of 5 % during the Forecast Period.

Centrifugal pumps are expected to remain dominant and may continue to be the most widely used type due to their varied pressure and load handling capacities. Some of the attributes of centrifugal pumps include treating high solid quality liquids and comparatively low maintenance costs. Further, due to the growth in process manufacturing operations, demand for positive displacement pumps is expected to outpace the industry average. Development in manufacturing operations, especially in challenging environments such as those in the chemical industry, is likely to benefit from the demand for aftermarket products.

The Industrial Sector Remains the Dominant End-user Market Due to the Growing Demand for Pumps in the Oil and Gas Industries.

The demand for industrial pumps is anticipated to drive the refineries beyond the expected timeline. Strict government controls and pollution reduction initiatives are expected to limit oil and gas demand growth and thus limit market development throughout the forecast period. In processing hydrocarbons, refineries, water injection, and pipelines, centrifugal pumps are widely used, and the demand is projected to expand as the refining capacity grows. Moreover, the recovery in oil prices and the increasing volume of onshore and offshore fields, which includes the development, evaluation, and construction activity of fields, will expand the oil

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& gas sector. The expansion is expected to contribute to the development of deep-water offshore enterprises for deeper offshore areas, thereby increasing the demand for submersible pumps.

Asia-Pacific Remains the Dominant Region for the Global Pumps Market.

The sales are likely to be based on high capital spending and construction expenditure growth. Several Asian countries, including China and India, are investing more in oil, pesticides, and food and drinks. In addition, there will be two prime developments in the market for water infrastructure; expansion of access to water sources and sanitation in emerging countries and rehabilitation and up-gradation of aged water facilities in developed countries. According to Arizton Advisory & Intelligence market research report, the pump market in India crossed USD 2.2 billion in 2020.

Segmentation by Product

- Centrifugal
 - o□Single Stage
 - o□Multistage
 - o□Submersible
 - o□Turbine
 - o□Others
- Reciprocating
 - o□Piston
 - o□Diaphragm
- Rotary
 - o□Gear
 - o□Lobe
 - o□Peristaltic
 - o□Vane
 - o□Others

Segmentation by End-user

- Industrial
 - o□Oil & Gas
 - o□Water & Wastewater
 - o□Food & Beverage
 - o□Chemical
 - o□Power
 - o□Mining
 - o□Pharmaceutical
 - o□Others
- Agricultural
- Commercial
- Residential

Segmentation by Geography

- APAC
 - o□China
 - o□Japan
 - o□India

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- o Spain
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- o US
- o Canada
- Middle East & Africa
- o Saudi Arabia
- o UAE
- o Turkey
- Latin America
- o Brazil
- o Mexico

COMPANY & STRATEGIES

The global pumps market is highly competitive, and the critical primary competitive factor is the 'differentiating product line.' Vendors are actively investing in R&D to develop fundamental technology to establish competitiveness by enhancing core product technology in the industry. In addition, vendors differentiate themselves by improving product development, focusing on after-sales business, and cutting costs through greater operational efficiency. In the aftermarket portion, the competition is majorly against large, well-established national and global competitors and, in some markets, against regional and local companies.

Prominent Vendors

- Alfa Laval
- WILO
- Xylem
- The Weir Group
- Torishima
- Sulzer
- SPX FLOW
- KSB
- Kirloskar Brothers
- Franklin Electric
- Flowserve
- DESMI
- CIRCOR
- Baker Hughes
- Nikkiso

Other Prominent Vendors

- Arian Pumps
- AR North America

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- []Bosch Rexroth
- []CP Pumpen AG
- []Dover
- []Masdaf
- []Norm Hydrophore Pump
- []Sempa
- []Sumak Pump
- []Vesta Pump
- []Vansan
- []Samsun Makina Sanayi
- []Sahinler Submersible Pump
- []PUMPPORT
- []Jetox Pumps
- []Ebara
- []Grundfos
- []Global Pump
- []Haight Pumps
- []HERMETIC-Pumpen
- []Iwaki America
- []Klaus Union
- []Kracht
- []Leitritz Group
- []Naniwa Pump
- []Netzsch
- []Pentair
- []Roper Pumps
- []Ruhrpumpen
- []SEKO

KEY QUESTIONS ANSWERED

- 1.[]WHAT IS THE CURRENT MARKET SIZE OF THE GLOBAL PUMPS MARKET?
- 2.[]WHAT IS THE GLOBAL PUMPS MARKET GROWTH?
- 3.[]WHAT ARE THE FACTORS DRIVING THE PUMP MARKET GROWTH?
- 4.[]WHAT IS THE GROWTH RATE OF THE CENTRIFUGAL PUMPS MARKET?

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