

Positive Displacement Pumps Market - Growth, Trends, Covid-19 Impact, and Forecasts (2023 - 2028)

Market Report | 2023-01-23 | 125 pages | Mordor Intelligence

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Report description:

The global positive displacement pumps market is expected to record a CAGR of more than 4.8% over the forecast period, 2022-2027. The COVID-19 pandemic has negatively impacted the oil and gas and power generation activities across the world. The decline is caused mainly due to delays in project construction activities and supply chain disruptions, thereby reducing the demand for positive displacement pumps across the world. Factors such as increasing environmental awareness, spiraling costs, shrinking resources, and a large number of water-dependent industries deploying water treatment systems to improve reliability, enhance profitability, and maintain the sustainability of their operations are driving the positive displacement pump market. Moreover, the recovery in the oil and gas industry post the decline period is bolstering the demand for positive displacement pumps due to increased activities, especially in North America. However, rising raw material costs and issues with the maintenance of positive displacement pumps are expected to restrain the market during the forecast period.

Key Highlights

The water and wastewater sector is expected to witness significant market growth, owing to the development of water and wastewater infrastructure, in line with the surging demand for clean water. The demand for pumps from the water and wastewater industry is growing rapidly on account of increasing government concerns. This, in turn, is expected to propel the demand for the positive displacement pumps market during the forecast period.

Governments in Asia-Pacific have introduced strict policies and regulations regarding wastewater treatment in the municipal and industrial sectors. Operators are required to deploy water treatment units in their facilities to overcome water scarcity challenges. So, wastewater treatment is expected to create ample opportunities for the positive displacement pumps market in the near future.

North America is expected to be the largest and fastest-growing market during the forecast period due to an increase in industrial activities, particularly in the United States and Canada.

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Positive Displacement Pumps Market Trends

Water and Wastewater Sector to Witness Significant Market Growth

Most of the human and industrial activities that use water produce wastewater. As the overall demand for water grows, the quantity of wastewater produced and its overall pollution load are continuously increasing worldwide. As a result, governments across the world have introduced strict policies and regulations regarding wastewater treatment for both the municipal and industrial sectors.

Around two-thirds of the world's population live in areas that experience water scarcity for at least one month a year. Around 50% of the people facing this level of water scarcity live in India and China. Therefore, the demand for the treatment of wastewater, produced as a result of human and industrial sector water usage, is expected to grow in order to improve the efficiency of water usage and meet the water demands.

As of 2021, China has around 64.72% of the urban population in the country's overall population share. Urban wastewater treatment plants play a crucial role in treating the waste in a proper manner.

Moreover, according to the United Nations University Institute of Water, Environment, and Health, in 2020, high-income countries treated around 74% of the industrial and municipal wastewater they generated, and this ratio dropped to 43% in upper-middle-income countries and about 26% in lower-middle-income countries. With increasing awareness about the environment and growing water shortage, the demand for water treatment plants and the usage of positive displacement pumps in water treatment plants are expected to increase in developing countries.

Hence, the usage of positive displacement pumps in the water and wastewater sector is expected to witness a significant increase in demand during the forecast period.

North America Expected to Dominate the Market

The United States is the largest market for positive displacement pumps in North America. The presence of a wide range of domestic manufacturing and processing industries, such as oil and gas, chemicals, and food and beverages, along with huge water and wastewater management and power generation sectors, has augmented the demand for positive displacement pumps over the past several years.??

The oil and gas industry in the United States is projected to provide an impetus to the positive displacement pumps market on account of investments lined up in oil and gas projects for the coming years. It is expected that around USD 76 billion will be spent on 97 oil and gas projects by 2025. Such robust growth in terms of new projects is projected to create a demand for new pump systems in the United States in the longer run.?

However, according to Energy Information Administration, the US crude oil production fell from a record 12.9 million per barrel per day (mbpd) in November 2019 to 11.4 mbpd in May 2020, in conjunction to the fewest active drilling wells reported in the United States since 1987. Further, the US average crude oil production was 11.3 mbpd in 2020, and it is expected to be 10.8 mbpd in 2021. This decline in production was the first annual decline since 2016.?

The oil and gas producers in the United States operated the fewest oil and natural gas drilling rigs on record in the United States at 246 as of June 12, 2020. The number of average active rigs began to decrease sharply from mid-March 2020 as crude oil prices started to fall, decreasing from around 772 rigs in March 2020 to an average of 348 rigs in May 2020. Since June 2020, the active rig count in the county has been witnessing a slow and steady growth and reached an average of 453 rigs in May 2021.?

Moreover, in November 2020, Wilo SE, a global manufacturer of positive displacements, announced the opening of its new factory in Wisconsin, United States, which will boost the market for positive displacement pumps in the region.

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Owing to the above points, North America is expected to dominate the growth of the positive displacement pumps market during the forecast period.

Positive Displacement Pumps Market Competitor Analysis

The positive displacement pumps market is fragmented. Some of the key players in the market include Flowserve Corp., Sulzer AG, KSB SE & Co. KGaA, Xylem Inc., and NETZSCH Holding.

Additional Benefits:

The market estimate (ME) sheet in Excel format
3 months of analyst support

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