

**Japan Hydraulic Pump Market Assessment, By Type [Gear Pump, Piston Pump, Vane Pump, Water Pump, Others], By Application [Construction, Automotive, Agriculture, Others], By Power Source [Gas, Electric], By Region, Opportunities and Forecast, FY2018-FY2032F**

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**Report description:**

Japan hydraulic pump market is projected to witness a CAGR of 4.92% during the forecast period FY2025-FY2032, growing from USD 0.98 billion in FY2024 to USD 1.44 billion in FY2032. The market has experienced significant growth in recent years and is expected to maintain a steady expansion in the coming years owing to the growing industrial automation, infrastructure development, and significant technology innovation. Hydraulic pumps are essential components in machinery used across a wide variety of industries, comprising automotive, construction, agriculture, and manufacturing. Consistent industrialization and the growing need for energy-efficient systems have increased the need for hydraulic pumps in Japan. Also, the rapid advancements of automation technologies are one of the key drivers of the Japan hydraulic pump market growth in the forecast period. Japan is a global leader in automation and robotics, and hydraulic pumps are efficient for powering robotic systems, automated production lines, and heavy machinery. As industries continue to adopt more automated procedures, the requirement for high-performance and energy-efficient hydraulic pumps increases.

Furthermore, the commitment of the Japanese government to infrastructure development has been another factor propelling the market's growth. Large-scale infrastructure projects, comprising urban development, expansion in the transportation network, and energy infrastructure, demand hydraulic pumps for construction equipment including excavators, bulldozers, and cranes. The government is also focusing on advancing and upgrading infrastructure to further expand the requirement for hydraulic solutions. The growing awareness concerning energy efficiency and environmental sustainability is projected to drive Japan hydraulic pump market demand in the forecast period. With the growing concerns towards carbon emissions, industries are increasingly adopting hydraulic pumps that provide lower energy consumption, improve effectiveness, and reduce maintenance costs, surging the requirement for hydraulic pumps. The automotive industry in Japan efficiently uses the hydraulic system in off-road vehicles to

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offer a significant improvement and ensure safe operations. Also, hydraulics in automotive improve the safety, comfort, and control of a vehicle's suspension.

For instance, in July 2024, Yanmar Holdings Co., Ltd. announced the introduction of the ViO30-7 and ViO35-7 zero-tail swing mini excavators, featuring enhanced hydraulic systems for better workability and safety. With this launch, the company is committed to offering compact construction equipment that confirms preventive operation for urban development.

#### Advancements in Automation and Robotics Drive the Hydraulic Pump Market in Japan

In automation and robotics, Japan is one of the leading countries. With a significant rise in the adoption of automated systems in industries including automotive, manufacturing, and logistics, hydraulic pumps are playing an important role in powering machinery and robotics, which further drive the Japan hydraulic pump market growth in the forecast period. Automated production lines, robotic arms, and material handling systems demand precise and reliable hydraulic systems to operate efficiently. Hydraulic pumps are significantly utilized in the robotics sector to offer the necessary force and motion in robotic actuators, confirming accurate and smooth operations. In addition, with the growing emphasis on Industry 4.0 and smart manufacturing especially in Japan, the demand for robotics is consistently rising, which further propels the demand for high-performance hydraulic pumps. Furthermore, the ongoing push towards automation in Japan by the government, including the "Robot Revolution Initiative," drives the development and integration of robotic systems across different industries. This trend is estimated to maintain a consistent growth for Japan hydraulic pump market, as a huge number of industries have relied on these pumps to address the rising requirement for advanced robotics and automated manufacturing systems. Companies are announcing a partnership to offer automated services to clients by using autonomous robots.

For instance, in February 2024, Uber Technologies Inc. announced a partnership with Mitsubishi Electric Corporation and Cartken Inc. to offer an online food delivery service in Tokyo, Japan, by using autonomous robots featuring hydraulic and pneumatic actuators.

#### Increasing Requirement in Construction and Infrastructure Development Propel Market Growth

Japan hydraulic pump market demand is witnessing significant growth owing to a consistent boom in construction and infrastructure projects. Japanese government aims on modernizing and expanding its urban landscapes, and the requirement for heavy machinery that demands hydraulic systems including excavators, loaders, and cranes has increased significantly. Hydraulic pumps are integrated into these machines, offering efficient power transmission for different construction tasks. The Japanese government is also committed to large-scale infrastructure development, including the construction of high-speed rail networks, renewable energy plants, and bridges, which will further propel Japan hydraulic pump market demand in the forecast period. In addition, the aging infrastructure of Japan is surging increased maintenance and upgrade projects, further accelerating the demand for hydraulic pumps. These trends not only confirm a stable market growth for prevailing hydraulic pump technologies but also encourage innovation in the effectiveness, sustainability, and compactness of hydraulic systems to address the evolving requirements of the construction industry. Furthermore, companies in the automotive market are launching off-road-vehicles featuring hydraulic solutions to address the rising demand from the construction industry and others.

For instance, in October 2022, Komatsu Ltd. exhibited a 20-ton-class electric hydraulic excavator equipped with a lithium-ion battery system for the first time at bauma2022. This machine was scheduled to be introduced to the European and Japanese markets in FY2023.

#### Water Pumps Dominate Japan Hydraulic Pump Market Share

The water pump segment dominates the market share owing to its essential role in different agricultural and industrial applications. Water pumping systems are essential in sectors including agriculture, construction, water treatment, and power generation. In construction, hydraulic pumps are utilized for dewatering operations including preventing flooding, excavation sites, and supporting foundation work. The agriculture sector also depends heavily on water pumps for irrigation, especially across rural regions where water distribution systems are important for crop cultivation. In addition to their widened usage in agriculture and infrastructure, water pumps are important in Japan's industrial water management system, where they are utilized to regulate water flow in cooling procedures, wastewater treatment plants, and manufacturing lines. Furthermore, the dominance of water pumps in Japan hydraulic pump market is also attributed to Japan's aim on environmental sustainability. Water pumps with energy-saving features and low carbon emissions are in high requirement, coupled with the country's green initiatives. Therefore, water pumps continue to hold a substantial share of hydraulic pump market propelled regulatory factors. Companies in the

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market are launching hydraulic pumps for water treatment to ensure optimal operations even when demand varies. For instance, in January 2024, Grundfos Pumps KK, a leading company in Japan announced the launch of new SP 6-inch hydraulic pump for groundwater pumping which sets new standard for durability and reliability in groundwater pumps for any application. Southern Japan is Expected to Register the Largest Market Share

Southern Japan is projected to dominate the largest market share due to geographical advantages, presence of giant market players, economic infrastructure, and rapid industrial development. Southern Japan serves as a key hub for manufacturing, especially in sectors including electronics, automotive, and heavy industries. Giant market players have a considerable presence in this region, contributing to its economic strength. The strategic location of a region with well-connected ports enhances its role in international trade and logistics, making it a key player in the global supply chains. Southern Japan's infrastructure, including industrial development and advanced transportation networks, fascinates both international and domestic investments, propelling economic growth. Furthermore, companies in the Southern region are launching different advanced off-road vehicles to be conveniently accessible at ground level and improve efficiency.

For instance, in October 2024, LBX Company LLC, a wholly owned subsidiary of Sumito Construction Machinery with manufacturing based in Chiba, Japan, announced the launch of a new Link-Belt 370 X4S hydraulic excavator featuring advanced technology, including dynamic stability assist, digital level, depth alarm and height, and payload.

Future Market Scenario (FY2025–FY2032F)

- Japan's robust industrial sector, including automotive, electronics, and chemical industries, drives demand for advanced hydraulic pumps to support manufacturing processes.
- Government regulations and incentives promoting energy-efficient machinery encourage the adoption of advanced hydraulic pumps, contributing to market expansion.
- Investments in upgrading and maintaining aging infrastructure necessitate the use of reliable and efficient hydraulic systems, driving market demand.
- Growing environmental awareness and the need for sustainable solutions are pushing the adoption of eco-friendly hydraulic pumps in various industries.

Key Players Landscape and Outlook

Companies in the Japan hydraulic pump market are expanding their market share and product portfolios through strategic investments in technology and partnerships. Key players are focusing on developing advanced hydraulic systems that cater to the diverse needs of sectors such as construction, agriculture, and manufacturing. By integrating cutting-edge technologies, these companies are enhancing the performance and efficiency of their hydraulic pumps. Collaborations with local and international partners enable them to innovate and introduce new features, ensuring they stay ahead of market trends. Additionally, active participation in government initiatives and campaigns promoting infrastructure development helps solidify their position in the market. These efforts collectively contribute to their market growth and competitiveness.

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\*Companies mentioned above DO NOT hold any order as per market share and can be changed as per information available during research work.

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