

Global Industrial Pumps - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2025 - 2030)

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Report description:

The Global Industrial Pumps Market is expected to register a CAGR of 4.7% during the forecast period.

Key Highlights

- Industrial pumps are primarily used in harsh or heavy-duty applications. Growing exploration activities in the oil and gas sector because of the escalating energy demand and the increasing emphasis on upgrading existing wastewater treatment plants contribute to market growth. This could be due to the limited availability of potable water, raising awareness about the harmful impacts of drinking contaminated water, and growing environmental concerns.
- India is planning to derive 40% of its energy from renewable sources by 2030, which is at 15% currently. To achieve these energy manufacturing goals, manufacturers, with the government's help, are making significant investments in the market studied. For instance, the Union Budget 2022-23 emphasized inclusive growth and welfare. The PM Gati Shakti plans to provide world-class modern infrastructure and logistics synergy for the growth and development of the country. For the pump industry, an increased share of domestic procurement in defense and additional allocation of PLI for high-efficiency solar module manufacturing would benefit the respective manufacturers of pumps.
- The market is also witnessing various partnerships and collaborations among various vendors that is augmenting the market growth. For instance, in June 2022, Flowserve Corporation, a leading provider of flow control products and services for global infrastructure markets, announced a contract to supply pumps to TMGcore, Inc., a Texas-based leading provider of high-performance computing solutions specializing in liquid immersion cooling technology.
- Additionally, a primary boiler feed water pump, BFP (RHD-350), and Booster Pump-BP (YNK 350-620) were supplied by the pump manufacturer KSB Ltd in April 2021 to the Nuclear Power Corporation of India Ltd. (NPCIL). By creating the pump for the 700 MW Indian Pressurized Heavy Water Reactors (PHWRs) and adding it to its product line, which already includes a variety of pumps for nuclear application, KSB Ltd. achieved a significant milestone.

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- Demand in the industrial sector was noticeably lower during the COVID-19 outbreak and the ensuing lockdown. The entire industrial manufacturing capacity was decreased, and the consumer sectors were consolidated in 2020 and 2021 due to the closure of smaller companies and organizations with a rather precarious financial state. For instance, the decreased demand for pumps from end-users caused Flowserve Corporation, one of the largest manufacturers of industrial pumps, to see a significant decline in operating income from USD 387 million to USD 250 million.

Industrial Pumps Market Trends

Water and Wastewater to Hold a Significant Share

- Water and wastewater treatment utilities are typically the largest energy consumers, averaging 30% to 40% of the total energy consumed. This makes implementing energy-efficiency measures in water sector systems an inevitable option. Further, EPA estimates that 3% to 4% of the US electricity consumption will be consumed to provide clean drinking water to its citizens and manage wastewater.
- The governments are making various investments across the regions to improve the water infrastructure. For instance, in November 2021, the United States president signed the Infrastructure Investment and Jobs Act (IIJA) that allocated USD 1.2 trillion for the infrastructure in the United States, including USD 55 billion for water pipe upgrades and investments in clean drinking water and water recycling programs.
- Moreover, China published new guidelines for wastewater reuse, raising the proportion of sewage that must be treated to reuse standards to 25% by 2025. This further proves the country's ambition to transition from capacity expansion to a greater emphasis on treated effluent quality. As part of the effort, China aims to construct and upgrade 80,000km of wastewater collection pipelines over the next five years.
- In March 2022, Flowserve Corporation announced its partnership with Gradiant to help address the most challenging water and wastewater treatment problems. Gradiant develops and delivers advanced water and wastewater treatment facilities worldwide, whereas Flowserve Corporation is a provider of flow control products and services for the global infrastructure markets.
- Further, according to a survey conducted by American Water Works Association (AWWA), renewal and replacement of aging water and wastewater is the primary issue in the water sector, with 65.2% respondents agreeing to the issue.

Asia Pacific to Hold Significant Market Share

- The demand for industrial pumps in the region is essentially driven by increasing investments towards water infrastructure, with continuous expansion in water supply and sanitation systems access. This has led to an increase in the utilization of pumps across a range of end-use industries such as chemical and wastewater treatment plants, and general industries including mining, food and beverages, pulp and paper manufacturing, and power generation.
- The growth in the number of COVID-19 cases across the Asia Pacific region and the consequent restrictions imposed on various activities have significantly impacted the industrial pumps market in the region. A decline in the consumption of pumps coupled with the restriction on construction activities hampered the market growth. However, with restrictions easing up, the market is expected to recover in the coming years.
- Moreover, with the increasing rate of industrialization and urbanization, coupled with the growing need of energy, the demand for minerals is expected to rise significantly in the years ahead, which would fuel the adoption of industrial pumps in the Asia Pacific region.
- November 2021 - Atlas Copco announced to complete the acquisition of India-based HHV Pumps. The company is engaged in design and manufacturing of vacuum pumps and systems for applications used across an array of industries, including chemical

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and pharmaceutical, and electrical power equipment.

Industrial Pumps Industry Overview

The Global industrial pumps market is witnessing a rise in competitiveness among companies. The market consists of various major players, such as Atlas Copco and The Weir Group PLC. However, with increasing technology innovations, many companies are increasing their market presence by securing new contracts and tapping new markets.

- June 2021 - Ingersoll Rand Inc., a global provider of mission-critical flow creation and industrial solutions, has announced the acquisition of a positive displacement pump manufacturer, seepex GmbH, for EUR 431.5 million.

Additional Benefits:

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

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