

Multi-Stage Centrifugal Pumps - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2025 - 2030)

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Report description:

The Multi-Stage Centrifugal Pumps Market size is estimated at USD 7.23 billion in 2025, and is expected to reach USD 9.24 billion by 2030, at a CAGR of 5.04% during the forecast period (2025-2030).

Investments in water treatment projects, expansion of the oil and gas industries, and the availability of highly energy-efficient and powerful multi-stage centrifugal pumps are driving market growth during the forecast period.

The Usage Of Multi-stage Centrifugal Pumps In Transporting Fluids At Industrial Sites Is Driving The Market Growth

Key Highlights

- A multi-stage centrifugal pump is a rotating device that transforms kinetic energy into a liquid head. These pumps find applications in facilities like refineries, oil production platforms, petrochemical plants, and power plants. Beyond these, they're also utilized in agriculture, food processing, residential construction, and water supply.
- Equipped with multiple impellers, multi-stage centrifugal pumps elevate water pressure sequentially, achieving higher pressures than their single impeller counterparts of the same size. Furthermore, with smaller impeller diameters and tighter clearances, these pumps demand less motor horsepower, enhancing both performance and efficiency. More stages in a pump result in a higher final discharge pressure. While adding stages allows these pumps to achieve progressively higher pressures, the flow rate remains constant at a specific revolutions per minute (RPM). This advantage is propelling the growth of the multi-stage centrifugal pump market.

The Emerging Trend Of Water Treatment And Wastewater Management Worldwide Creates A Growth Opportunity For The Market

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Key Highlights

- Water treatment plants are pivotal in ensuring communities access clean and safe drinking water. The pumps and pumping systems transporting water through the treatment stages are central to these operations. Multi-stage pumps, or multi-stage centrifugal pumps, provide efficient and reliable solutions tailored to the rigorous demands of water treatment.
- Multi-stage pumps find diverse applications, from supplying water to high-rise buildings and reverse osmosis (RO) systems to feeding boilers, spraying, high-pressure cleaning, and other waterworks. This versatility bolsters the market's growth, paralleling the global expansion of water treatment plants.

Initial High Cost Of The Product And The Risk Of Counterfeiting Are The Major Challenges In The Market

Key Highlights

- Multi-stage centrifugal pumps have a notable drawback with their higher initial cost. Due to their intricate design and the demand for precision engineering, these pumps are more expensive than their single-stage counterparts. However, when evaluating the investment, users must weigh the long-term operational advantages and energy savings that can counterbalance this upfront expense.
- Moreover, increasing costs are putting pressure on the fragmented market, making it difficult for the market vendors to compete with locally produced and imported counterfeit products. Consequently, consumers must remain vigilant about their purchases and grasp the significance of the product-life-cycle cost. Consumers must evaluate expenses throughout a product's life cycle rather than concentrating solely on the upfront cost.

Post-COVID-19, the surge in renewable energy projects has opened avenues for the market, particularly with the rising use of multi-stage centrifugal pumps in applications like concentrated solar power (CSP) and geothermal plants. In CSP plants, sunlight is concentrated to heat a fluid to extreme temperatures. Multi-stage centrifugal pumps then circulate this heated transfer fluid through heat exchangers, generating superheated steam. This steam powers turbines, underscoring the market's growth potential.

Multi-Stage Centrifugal Pumps Market Trends

Oil and Gas Industry to be the Largest End User

- Multistage-centrifugal pumps, known for their capability to transfer fluids at elevated pressures, find extensive use across various industrial sectors. Notably, the Oil and Gas industry stands out as a primary adopter of this technology. Defined by their series-stacked impellers within a unified casing, these pumps excel in delivering heightened discharge pressures. This attribute renders them ideal for boosting applications, including the pipeline transportation of oil and gas and high-pressure injection processes. As investments in oil and gas production activities surge, the market is poised for significant growth.
- Multistage-centrifugal pumps are crucial during the production, transport, storage, and distribution of liquefied gases. Liquefied gases can be transported and stored more easily than in their gaseous state. This liquefaction process is achieved through compression or cooling. When there's demand, the liquefied gas is regasified by releasing pressure and then delivered to consuming units using pumps. Moreover, the increasing demand for liquefied gases across various countries in the world and increased investments in production will enhance the market opportunities.
- Heightened oil and gas exploration activities, coupled with escalating investments in production fields, are set to propel the market's growth. In 2023, global oil production achieved a record high of 96.4 million barrels per day, marking an increase from 94.2 million barrels per day in 2022.

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- Furthermore, the IEA highlighted a notable 11% rise in global upstream oil and gas investments for 2023, amounting to a substantial USD 528 billion, a jump from the previous year's USD 474 billion. Projections indicate that total supply capacity could be near 114 million barrels a day by 2030. Given these significant developments and the rise in exploration investments across multiple regions, the market stands on the brink of substantial opportunities.
- Further, according to Baker Hughes, North America leads the world in hosting oil and gas rigs. As of August 2024, the region boasted 781 land rigs and an additional 23 offshore rigs. In 2023, the global count of oil rigs surpassed 1,800 units on average.
- Several companies manufacture liquefied gas pumps, essential for the production, transport, storage, and distribution of liquefied gases. These pumps, designed with various features, ensure effective gas conveyance across these diverse applications. Thanks to their low NPSH (Net Positive Suction Head) values, these pumps operate without cavitation, maintaining full conveyance in both suction and intake modes. According to IEA, the global gas market is transitioning as the world slowly recovers from a significant energy crisis, impacting both supply and demand. Such dynamics are poised to fuel growth in this segment.
- According to IEA, in 2024, global gas demand is projected to rise by 2.5%, equating to an increase of 100 billion cubic meters (bcm). With a colder winter anticipated in 2024, contrasting the mild temperatures of 2023, there's an expected uptick in demand for space heating across both residential and commercial sectors. Data from the Energy Institute reveals that in 2023, the global trade volume for liquefied natural gas reached 549 billion cubic meters. Notably, from 1970 to 2023, this figure saw a substantial increase of 546 billion cubic meters. Furthermore, in 2023, the United States emerged as the dominant player, being the world's leading LNG exporting nation.

Asia Pacific is Expected to Hold Significant Market Share

- Rapid urbanization, industrial growth, a rising population, and heightened concerns about water scarcity are fueling the expansion of investments in water and wastewater treatment across the Asia-Pacific region.
- In June 2024, Veolia Water Technologies, a subsidiary of Veolia and a prominent player in water treatment technologies and services, inaugurated its inaugural ion exchange regeneration facility in China. Equipped with cutting-edge technology, the facility efficiently recycles spent ion exchange resins, underscoring Veolia's commitment to resource optimization and sustainability.
- In January 2024, Koastal Eco Industries Co., Ltd., part of Singapore's Koastal Group, inked a USD 4.3-million EPC (engineering, procurement, and construction) contract to establish a wastewater treatment plant in Tay Ninh, a southern province of Vietnam. This facility, boasting a daily capacity of 15,000 cubic meters, will handle all wastewater from the Thanh Thanh Cong Industrial Zone, a project of the TTC Group Joint Stock Company (JSC) conglomerate and its namesake company.
- Additionally, in September 2024, V Energy, Australia's leading energy drink brand, became the inaugural beverage produced at Suntory Oceania's newly established multi-beverage manufacturing facility in Ipswich, Queensland. Set to be fully operational by mid-2025, this expansive 17-hectare site, boasting carbon neutrality, is poised to serve as the central manufacturing and distribution hub for Suntory's diverse portfolio, encompassing over 40 brands.
- In May 2024, Aurobindo Pharma's subsidiary, TheraNym Biologics Pvt Ltd, inked a master service agreement with Merck Sharp & Dohme Singapore, focusing on the contract manufacturing of biologicals. This agreement, effective from May 2024, empowers TheraNym to manufacture biologicals for both domestic and international markets. Additionally, TheraNym is set to invest INR 1,000 crore in establishing a biologics manufacturing facility in Telangana, India.
- In October 2024, Google unveiled a USD 1 billion investment for building a data center in Thailand, aiming to address the surging demands for cloud storage and AI tools in Southeast Asia (SEA). This announcement followed closely on the heels of Google Cloud's multi-year agreement to deliver sovereign cloud services to Malaysia, made in the same week. Additionally, in May 2024, Google had already made a significant move into SEA with a USD 2 billion investment for another data center. Such developments in water treatment, construction, chemicals, and food and beverage sectors are expected to drive growth in the multi-stage centrifugal pumps market.

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Multi-Stage Centrifugal Pumps Industry Overview

The multi-stage centrifugal pump market comprises several global and regional players vying for attention in a contested space. Although the market studied poses high barriers to entry for new players, several new entrants have gained traction.

Market leaders, such as Kirloskar Brothers Limited, Baker Hughes Company, Xylem Inc., and others, have a considerable influence on the overall market, with access to well-established distribution networks.

The brand identity associated with the major vendors has become synonymous with various product offerings in the global market. These firms have continuously expanded their operational scales by focusing on market expansions and acquisitions. Furthermore, many vendors in the market are dedicating their R&D efforts to capturing unexplored domains and forming partnerships for sustainability. The same is true for geographic expansion strategies.

Market growth is supported by the development of highly energy-efficient, reliable, and operationally productive multi-stage centrifugal pumps, which increase competition in the market's supply side. Overall, the intensity of competitive rivalry among the vendors in the market studied is expected to be high and remain the same over the forecast period.

Additional Benefits:

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

Table of Contents:

1 INTRODUCTION

- 1.1 Study Assumptions and Market Definition
- 1.2 Scope of the study

2 RESEARCH METHODOLOGY

3 EXECUTIVE SUMMARY

4 MARKET INSIGHTS

- 4.1 Market Overview
- 4.2 Industry Attractiveness - Porter's Five Forces Analysis
 - 4.2.1 Bargaining Power of Suppliers
 - 4.2.2 Bargaining Power of Buyers
 - 4.2.3 Threat of New Entrants
 - 4.2.4 Threat of Substitutes
 - 4.2.5 Intensity of Competitive Rivalry
- 4.3 Industry Value Chain Analysis
- 4.4 Impact of COVID-19 Aftereffects and Other Macroeconomic Factors on the Market

5 MARKET DYNAMICS

- 5.1 Market Drivers
 - 5.1.1 High Demand for Water and Wastewater Management in Developed Countries
 - 5.1.2 Growing Integration of Innovative Technologies to Efficiently Operate Product
- 5.2 Market Challenges

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5.2.1 Increased Competition from Grey Market Players and Unorganized Sector

6 MARKET SEGMENTATION

6.1 By Type

6.1.1 Horizontal Pumps

6.1.2 Vertical Pumps

6.2 By End-User Industry

6.2.1 Oil and Gas

6.2.2 Chemicals

6.2.3 Food and Beverage

6.2.4 Water and Wastewater

6.2.5 Pharmaceutical

6.2.6 Power Generation

6.2.7 Metal and Mining

6.2.8 Other End-User Industries

6.3 By Geography***

6.3.1 North America

6.3.2 Europe

6.3.3 Asia

6.3.4 Australia and New Zealand

6.3.5 Latin America

6.3.6 Middle East and Africa

7 COMPETITIVE LANDSCAPE

7.1 Company Profiles

7.1.1 Kirloskar Brothers Limited

7.1.2 Baker Hughes Company

7.1.3 CIRCOR International Inc.

7.1.4 Ebara Corporation

7.1.5 The Weir Group

7.1.6 Grundfos Holding

7.1.7 Pentair Inc.

7.1.8 Sulzer Ltd

7.1.9 Tsurumi Manufacturing Co. Ltd

7.1.10 Wilo SE

7.1.11 Xylem Inc.

7.1.12 KSB SE & Co. KgaA

8 INVESTMENT ANALYSIS

9 FUTURE OF THE MARKET

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