Steam Generation Water Pumps - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2025 - 2030)

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Report description:

The Steam Generation Water Pumps Market size is estimated at USD 8.95 billion in 2025, and is expected to reach USD 11.05 billion by 2030, at a CAGR of 4.30% during the forecast period (2025-2030).

Key Highlights
- Over the medium period, increased government investment in establishing water treatment infrastructure and increased power generation using steam is expected to drive the market in the forecast period.
- On the other hand, the emissions regulations, high capital and operations costs, and government renewable energy targets are expected to hinder the market in the forecast period.
- Nevertheless, technological advancements in steam-generation water pumps are expected to create future market opportunities.
- Asia-Pacific is expected to dominate the market in the forecast period. Owing to the high urbanization growth rate and growing electricity demand, mainly from China and India.

Steam Generation Water Pumps Market Trends

Boiler Feed Pump is Expected to have a Significant Market Share

- Boiler feed pumps, also known as feed pumps, feed a steam generator such as a boiler or a nuclear reactor with a quantity of feed water corresponding to the amount of steam emitted.

- Boiler feed pumps operate at fluid temperatures of 160 to 210 □C. In exceptional cases, the temperature of the fluid handled may be higher still. The design of boiler feed pumps, including power input, material, type of pump, and drive, is primarily governed by developments in power station technology.
- The boiler feed water pump used in power plants is a high-temperature and high-pressure multi-stage pump that can transport high-temperature fluids. With the increase in power demand and growing urbanization and population, the need for pumps used in power plants is expected to increase. For instance, according to the Statistical Review of World Energy Data, in 2023, global electricity generation accounted for 29924.8 TWh, with an annual growth rate of 2.5% compared to the previous year.
- A typical combined-cycle plant may have between 50 to 100 pumps, including boiler feed pumps. With the establishment of new combined-cycle plants to cope with the increasing energy demand, boiler feed pumps and other pumps are expected to increase.
- For example, in July 2023, Mitsubishi Power, a power solutions brand of Mitsubishi Heavy Industries, Ltd. (MHI), got a full-turnkey contract from Chiba-Sodegaura Power Co., Ltd., for a project to build three gas turbine combined cycle (GTCC) power plants with 650MW class natural gas-fired units in Sodegaura City, Chiba Prefecture.
- Thus, owing to the increasing power consumption and power plant construction, boiler feed pump is expected to have a significant share in the market.

Asia-Pacific is Expected to Dominate the Market

- Asia-Pacific is a developing continent with rapid economic and power demands due to significant growth driven by infrastructure development and many large construction projects.
- According to the Statistical Review of World Energy Data, in 2023, the Asia Pacific's total energy consumption accounted for 291.77 Exajoules, with an annual growth rate of 4.7 % compared to the previous year. Steam generation water pumps are generally used in power plants or any other application to provide energy in the form of steam.
- The share of Asia-Pacific's total global energy consumption is nearly 47.1% in 2023. With increasing energy consumption, the use of water pumps is expected to grow with its use coming from power plants running from steams.
- For instance, in October 2023, Thermax commissioned a contract for the 19.9 MW power plant in Negros Island in the Philippines - a first in South East Asia. The company completed the project, whose scope comprised a 90 TPH boiler, 19.9 MW steam turbine generator, and Balance of Plant systems.
- Further, the region have several upcoming thermal power plants, which are likley to create demand for steam generation water pumps. For instance, most of the countries like China, India, Indonesia, Vietnam, and a few others have plans to construct thermal power plants to meet its energy demand.
- In 2022 and 2023, China alone approved 218 GW of coal power plants. Commissioning of such projects is likley to have significant demand for steam generation water pumps in the region.
- Thus, owing to the above points, with the increasing use of steam, especially in power generation, Asia-Pacific is expected to dominate the market in the forecast period.

Steam Generation Water Pumps Industry Overview

The steam generation water pumps market is semi-fragmented. Some of the key players in this market include (in no particular order) Sulzer Limited, Thermax Limited, Wanner International Limited, Sundyne, and Mitsubishi Heavy Industries Ltd.

Additional Benefits:

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

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