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

Market Report | 2025-09-01 | 125 pages | Mordor Intelligence

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Report description:

Pumps Market Analysis

The Pumps Market size is estimated at USD 68.27 billion in 2025, and is expected to reach USD 86.10 billion by 2030, at a CAGR of 5.45% during the forecast period (2025-2030).

Growth is supported by large-scale water infrastructure upgrades, steady industrial capital spending, and the universal push for energy-efficient equipment. Electrification remains the dominant power source, while solar-powered systems create a fast-growing niche in agriculture and off-grid settings. Technical specifications are shifting toward smart, sensor-rich pumps that lower energy consumption, enable predictive maintenance, and meet tightening environmental rules. Competitive intensity in the pumps industry is rising as established suppliers broaden portfolios through acquisitions and low-cost Asian entrants compete on price and delivery speed. Supply-chain strategies increasingly emphasize material savings and multi-regional sourcing to counter raw-material price swings.

Global Pumps Market Trends and Insights

Escalating CAPEX in Desalination Projects across MENA & APAC

Seawater-desalination build-outs in Saudi Arabia and the UAE exceeded USD 4.8 billion in 2024, spurring demand for high-pressure pumps with ceramic composite wetted parts that last 40% longer than stainless-steel equivalents. Energy-recovery devices now standardize in new plants, trimming operating costs by up to 60% and raising technical barriers that favor suppliers with proven marine-grade materials expertise. Manufacturers with desalination references are capitalizing on premium pricing while competitors race to secure similar credentials.

Stringent Wastewater Reuse Mandates in Europe & North America

The revised EU Urban Waste Water Treatment Directive targets steep cuts in phosphorus and PFAS, accelerating adoption of precision-dosing and variable-flow circulation pumps able to support advanced oxidation and membrane filtration. Municipalities allocate more budget to integrated pump packages, raising the average order value by 27%. Suppliers offering controls and remote-monitoring capabilities are winning bids as utilities shift to outcome-based procurement.

Volatility in Nickel & Stainless-Steel Prices Inflating BoM

Pump producers in the pumps market report stainless-steel content of 30-40% in positive-displacement designs, so price spikes squeeze margins. Leading European brands now use computational fluid dynamics to reduce alloy weight by 15% in selected models and hedge exposure through multi-regional sourcing.

Other drivers and restraints analyzed in the detailed report include:

Rapid Expansion of Shale & Deep-water O&G Projects in US Gulf & Brazil / Surging District Cooling & Heating Installations in Nordics & Middle East / Proliferation of Low-cost Chinese Manufacturers Compressing Margins /

For complete list of drivers and restraints, kindly check the Table Of Contents.

Segment Analysis

Centrifugal pumps accounted for 56.8% of pumps market in 2024. Continuous improvements in impeller geometry and guide-blade profiles have lifted hydraulic efficiency by up to 15%. The segment is forecast to post a 6.2% CAGR, outpacing the overall pumps market. Widespread use in water supply, HVAC and refinery services provides a stable base, while emerging carbon-capture plants require tailored CO?-handling models with advanced seals and corrosion-resistant alloys.

Specialized centrifugal variants now enter carbon-capture and storage (CCS) circuits, where liquid and supercritical CO? present complex thermodynamic behavior. Vendors integrating sensor arrays enable operators to run close to best-efficiency points, cutting energy consumption and maintenance costs. Positive-displacement designs remain indispensable in metering, chemical injection and high-pressure slurry duties, commanding premium pricing due to stricter performance tolerances across these niches.

Horizontal machines still dominate 60% of the pumps market due to familiarity, straightforward maintenance, and lower initial cost. However, vertical inline and submersible models are set to grow by 5.8% CAGR as urban utilities and data-center builders confront floor-space constraints. ABB's pending addition of Aurora Motors strengthens its vertical-motor lineup, signaling supplier confidence in long-term upside.?(3)

Vertical pumps thrive in deep-well water supply, mining dewatering ,and wastewater wet-well installations where the driver remains above the fluid. Upgraded bearing systems and abrasion-resistant coatings allow longer run times between pulls. Segment demand also benefits from stricter building codes that favor compact plantrooms and stacked mechanical spaces.

The Pumps Market Report is Segmented by Pump Type (Centrifugal, Positive Displacement, and Others), Shaft Orientation

(Horizontal and Vertical), Driving Force (Electric-Driven, Engine-Driven, Pneumatic, and Solar-Powered), End User (Water and Waste-Water Utilities, Chemicals and Petrochemicals, Power Generation, and Others), and Geography (North America, Europe, Asia-Pacific, South America, and Middle East and Africa).

Geography Analysis

Asia-Pacific leads the pumps market with 51.60% share in 2024 and is expected to post a 6.0% CAGR through 2030. Massive urbanization, ambitious desalination pipelines, and strong agricultural modernization underpin growth. China's national heat-pump roadmap and India's solar-pump rollout sustain high-volume demand. Regional manufacturers move up the value chain toward sensor-enabled units, intensifying local competition.

North America remains innovation-driven. Federal water-infrastructure funding of USD 3.0 billion for lead-service-line replacement in FY2024 stimulates advanced potable-water equipment orders. Shale development in the US Gulf boosts demand for 10,000-psi fracturing pumps, while Canadian miners procure hard-wearing slurry units. Heat pumps outsold gas furnaces by 27% in 2024, highlighting electrification's ripple effect on pump selection.

Europe emphasizes lifecycle efficiency and environmental compliance. The updated EU wastewater directive creates a sizeable market for precision-dosing and membrane-feed pumps. Nordic district-heating networks scale rapidly, requiring large circulation pumps compatible with low-temperature operation. Utilities in Germany and the United Kingdom deploy predictive-maintenance software to lift asset availability and stretch replacement intervals. The Middle East channels heavy investment into desalination and district cooling, whereas many African economies prioritize off-grid solar irrigation solutions to raise farm yields and reduce diesel dependence.

List of Companies Covered in this Report:

Flowserve Corporation / Grundfos Holding A/S / KSB SE & Co. KGaA / ITT Inc. / Sulzer Ltd. / Ebara Corporation / Weir Group plc / Xylem Inc. / Wilo SE / Pentair plc / Tsurumi Manufacturing Co. Ltd. / Torishima Pump Mfg. Co. Ltd. / Baker Hughes Company / Schlumberger Limited / Celeros Flow Technology LLC / Atlas Copco AB / Kirloskar Brothers Ltd. / Ruhrpumpen Group / Desmi A/S / Zoeller Pump Co. /

Additional Benefits:

The market estimate (ME) sheet in Excel format /
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