

Global Air-Operated Double-Diaphragm (AODD) Pump for Industrial Market 2026 by Manufacturers, Regions, Type and Application, Forecast to 2032

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Abstracts

According to our (Global Info Research) latest study, the global Air-Operated Double-Diaphragm (AODD) Pump for Industrial market size was valued at US\$ 2593 million in 2025 and is forecast to a readjusted size of US\$ 3855 million by 2032 with a CAGR of 5.8% during review period.

Industrial air-operated double-diaphragm pumps are positive-displacement transfer equipment in which compressed air, routed through an air distribution valve, drives two diaphragms in alternating reciprocating motion to complete suction and discharge cycles. Their core role is to move corrosive, solids-laden, high-viscosity, shear-sensitive, flammable, explosive, or high-purity media safely between drums, IBCs, pipelines, and process units without relying on direct electric-motor drive. Official product pages consistently emphasize self-priming capability, dry-run tolerance, solids handling, chemical resistance, broad media compatibility, and the ability to adapt to different duties by changing body, diaphragm, ball, and seat materials. The market has developed along multiple material routes including aluminum, stainless steel, PP, PE, PVDF, and PTFE, and has further split into general industrial, hygienic food and pharmaceutical, high-purity electronic chemical, powder-transfer, and high-pressure subsegments. Typical customers are concentrated in chemicals, water treatment, paints and inks, food and beverage, pharmaceuticals, semiconductors, mining, and general manufacturing. Delivery therefore includes not only standardized pump units, but also solution-based sales built around certifications, connection standards, pulsation control, spare parts, and after-sales support. In essence, this is not merely a single pump component category, but an industrial fluid-handling platform centered on the safe transfer of hazardous and difficult media.

The fundamental value of the industrial AODD pump industry is not simply that it is a traditional pump category, but that it solves the most difficult transfer problems in process industries. Many media are not well suited to ordinary centrifugal pumps, including highly corrosive liquids, solids-laden slurries, high-viscosity fluids, shear-sensitive materials, flammable solvents, and pharmaceutical or electronic chemicals that require high cleanliness. In these situations, what customers are really buying is not just a housing with two diaphragms, but a transfer capability built around safety, compatibility, stability, and controllable maintenance. Official materials repeatedly emphasize self-priming, dry-run capability, solids handling, configurable materials, suitability for hazardous areas, and easy maintenance. This shows that AODD pumps are not merely generic pump substitutes, but core process equipment for difficult and high-risk media transfer. For that reason, although the industry may appear fragmented, true competition consistently centers on air-valve design, diaphragm life, material systems, certification capability, and application experience. The value of technology and engineering know-how is far greater than pure price competition.

From the demand side, industrial AODD pumps have clear cross-industry platform characteristics. Chemicals and water treatment remain the most stable base markets because both fields consistently require the transfer of corrosive media, sludge, flocculants, treatment chemicals, and waste liquids. Food and beverage, pharmaceuticals, and cosmetics then push the industry toward higher hygiene standards and higher unit value. At the same time, semiconductors, electronic chemicals, new-energy materials, and specialty chemicals are opening higher-value opportunities, where customers no longer care only about whether transfer is possible, but increasingly focus on purity, low contamination, low pulsation, and longer service life. Official pages also reveal another clear upgrade path centered on air efficiency, energy savings, low pulsation, and reduced downtime. This means future growth will come not only from new installations, but also from upgrades and replacements in the installed base. In other words, the growth logic of the AODD industry is shifting from general equipment procurement toward difficult-media management capability, hygiene and safety compliance capability, and total lifecycle cost optimization.

From the standpoint of competition and regional structure, the industry has already formed a relatively clear hierarchy. U.S., Japanese, and European suppliers still dominate high-end brand recognition, long-term certification accumulation, and adaptation to complex scenarios. Companies such as Dover, Ingersoll Rand, IDEX, Graco, Crane, Tapflo, Verder, Yamada, and Iwaki continue to consolidate their positions through complete product lines and global networks. At the same time, suppliers from mainland China and Taiwan are rapidly improving in product breadth, scenario

coverage, and local responsiveness, especially in standard-duty, corrosion-resistant, lithium-battery, marine, sludge, and powder-handling segments. It is important to note that this industry is unlikely to become fully commoditized, because hazardous-area requirements, explosion-proof compliance, FDA and hygienic validation, and fluid compatibility for specific media will continue to raise the entry barrier. Customers also tend to prefer suppliers with certifications, reference cases, spare-parts systems, and regional service networks. As a result, the overall outlook remains positive, and the greatest beneficiaries will be those companies that can provide not only standardized pump units, but also material selection, certification support, spare-parts systems, and application-based solutions.

This report is a detailed and comprehensive analysis for global Air-Operated Double-Diaphragm (AODD) Pump for Industrial market. Both quantitative and qualitative analyses are presented by manufacturers, by region & country, by Material and by Application. As the market is constantly changing, this report explores the competition, supply and demand trends, as well as key factors that contribute to its changing demands across many markets. Company profiles and product examples of selected competitors, along with market share estimates of some of the selected leaders for the year 2025, are provided.

Key Features:

Global Air-Operated Double-Diaphragm (AODD) Pump for Industrial market size and forecasts, in consumption value (\$ Million), sales quantity (Units), and average selling prices (US\$/Unit), 2021-2032

Global Air-Operated Double-Diaphragm (AODD) Pump for Industrial market size and forecasts by region and country, in consumption value (\$ Million), sales quantity (Units), and average selling prices (US\$/Unit), 2021-2032

Global Air-Operated Double-Diaphragm (AODD) Pump for Industrial market size and forecasts, by Material and by Application, in consumption value (\$ Million), sales quantity (Units), and average selling prices (US\$/Unit), 2021-2032

Global Air-Operated Double-Diaphragm (AODD) Pump for Industrial market shares of main players, shipments in revenue (\$ Million), sales quantity (Units), and ASP (US\$/Unit), 2021-2026

The Primary Objectives in This Report Are:

Global Air-Operated Double-Diaphragm (AODD) Pump for Industrial Market 2026 by Manufacturers, Regions, Type an...

To determine the size of the total market opportunity of global and key countries

To assess the growth potential for Air-Operated Double-Diaphragm (AODD) Pump for Industrial

To forecast future growth in each product and end-use market

To assess competitive factors affecting the marketplace

This report profiles key players in the global Air-Operated Double-Diaphragm (AODD) Pump for Industrial market based on the following parameters - company overview, sales quantity, revenue, price, gross margin, product portfolio, geographical presence, and key developments. Key companies covered as a part of this study include Dover Corporation, Ingersoll Rand Inc., Unibloc Hygienic Technologies US LLC, Crane Company, IDEX Corporation, Graco Inc., Tapflo Group, Verder Group, SPX FLOW, Inc., Xylem Inc., etc.

This report also provides key insights about market drivers, restraints, opportunities, new product launches or approvals.

Market Segmentation

Air-Operated Double-Diaphragm (AODD) Pump for Industrial market is split by Material and by Application. For the period 2021-2032, the growth among segments provides accurate calculations and forecasts for consumption value by Material, and by Application in terms of volume and value. This analysis can help you expand your business by targeting qualified niche markets.

Market segment by Material

PTFE AODD Pump

Metal AODD Pump

Market segment by Pressure Structure Classification

Standard 1:1 Type AODD Pump

2:1 Pressure-Boosted Type AODD Pump

High-Pressure Specialized Type AODD Pump

Market segment by Wetted Parts Material Classification

Aluminum Alloy Type AODD Pump

Cast Iron Type AODD Pump

Stainless Steel Type AODD Pump

PP Type AODD Pump

PVDF Type AODD Pump

Market segment by Application

Petrochemical

Food Industrial

Pharmaceutical

Industrial Wastewater Treatment

Other

Major players covered

Dover Corporation

Ingersoll Rand Inc.

Unibloc Hygienic Technologies US LLC

Crane Company

IDEX Corporation

Graco Inc.

Tapflo Group

Verder Group

SPX FLOW, Inc.

Xylem Inc.

Lutz Holding GmbH

Yamada Corporation

Iwaki Co., Ltd.

ProMinent GmbH

DEBEM S.r.l.

FLUIMAC S.r.l.

YTS JAPAN Co., Ltd.

Dynaflo Co.,Ltd.

ZHEJIANG LIGAO PUMP TECHNOLOGY CO.,LTD.

DYI SHENG INDUSTRY CO., LTD.

CHOU RONG MACHINERY CO., LTD.

BIANFENG MACHINERY GROUP

ZHONGWEI PUMP (JIANGSU) CO., LTD.

SHANGHAI YAQUAN PUMP CO., LTD.

Market segment by region, regional analysis covers

North America (United States, Canada, and Mexico)

Europe (Germany, France, United Kingdom, Russia, Italy, and Rest of Europe)

Asia-Pacific (China, Japan, Korea, India, Southeast Asia, and Australia)

South America (Brazil, Argentina, Colombia, and Rest of South America)

Middle East & Africa (Saudi Arabia, UAE, Egypt, South Africa, and Rest of Middle East & Africa)

The content of the study subjects, includes a total of 15 chapters:

Chapter 1, to describe Air-Operated Double-Diaphragm (AODD) Pump for Industrial product scope, market overview, market estimation caveats and base year.

Chapter 2, to profile the top manufacturers of Air-Operated Double-Diaphragm (AODD) Pump for Industrial, with price, sales quantity, revenue, and global market share of Air-Operated Double-Diaphragm (AODD) Pump for Industrial from 2021 to 2026.

Chapter 3, the Air-Operated Double-Diaphragm (AODD) Pump for Industrial competitive situation, sales quantity, revenue, and global market share of top manufacturers are analyzed emphatically by landscape contrast.

Chapter 4, the Air-Operated Double-Diaphragm (AODD) Pump for Industrial breakdown data are shown at the regional level, to show the sales quantity, consumption value, and growth by regions, from 2021 to 2032.

Chapter 5 and 6, to segment the sales by Material and by Application, with sales

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Chapter 7, 8, 9, 10 and 11, to break the sales data at the country level, with sales quantity, consumption value, and market share for key countries in the world, from 2021 to 2026. and Air-Operated Double-Diaphragm (AODD) Pump for Industrial market forecast, by regions, by Material, and by Application, with sales and revenue, from 2027 to 2032.

Chapter 12, market dynamics, drivers, restraints, trends, and Porters Five Forces analysis.

Chapter 13, the key raw materials and key suppliers, and industry chain of Air-Operated Double-Diaphragm (AODD) Pump for Industrial.

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