

Global Chemical Transfer Pumps Supply, Demand and Key Producers, 2026-2032

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Abstracts

The global Chemical Transfer Pumps market size is expected to reach \$ 5310 million by 2032, rising at a market growth of 3.2% CAGR during the forecast period (2026-2032). Chemical Transfer Pumps are purpose-built industrial pumping systems engineered to move, transfer, and in many cases meter a wide range of chemical fluids in a safe, reliable, and controllable manner. Typical product forms include chemical process pumps, metering pumps, diaphragm pumps, magnetic-drive sealless pumps, and drum/IBC transfer pumps. Their core mission is to deliver efficient material transfer while prioritizing the risk profile created by chemical media, including strong corrosiveness, toxicity, flammability/explosiveness, and challenging physical properties such as high viscosity, suspended solids/abrasives, and shear sensitivity. Accordingly, chemical transfer pumps are defined not only by hydraulic performance, but by chemical compatibility, containment integrity (leakage control), and stable operation under aggressive duty conditions.

Upstream inputs for chemical transfer pumps are dominated by metals, plastics/non-metallic materials, and motors. For metals, pressure-bearing and corrosion-critical components such as casings, impellers, shafts, and containment shells typically use stainless steels (304, 316L, 904L), nickel-based alloys, and titanium alloys to ensure durability in acids/alkalis, chloride-bearing media, and high-temperature corrosive services, with selected parts also using carbon steel, alloy steel, or copper alloys depending on cost and compatibility. Representative global suppliers for stainless and specialty steels include major integrated producers such as POSCO, Nippon Steel, Baosteel/TISCO, Aperam, and Outokumpu. For plastics and other non-metals, linings and wetted sealing elements often use high-performance polymers such as PTFE, PVDF, PEEK, and PPS, plus fiber-reinforced composites to enhance temperature capability and mechanical strength. Representative polymer and fluoromaterial suppliers include Chemours, Solvay, Arkema, Daikin, and Dongyue. Common motor

supply bases include large industrial motor OEMs such as ABB, Siemens, WEG, Nidec, and Wolong.

Downstream demand is primarily driven by the chemical industry, which is typically the dominant application domain, alongside logistics/transport and broader process industries where chemicals are stored, dosed, and transferred across production, blending, packaging, and distribution nodes. In terms of representative end customers, large industrial and commercial users may include major petrochemical and refining groups and large-scale chemical users such as PetroChina, Sinopec, Jingbo Petrochemical.

Gross margin for chemical transfer pumps is commonly in the range of 25%–45% in many market contexts, with dispersion mainly driven by product type and value-added content.

From a product-type perspective, chemical transfer pumps can be categorized into centrifugal pumps, diaphragm pumps, screw pumps, and other types. Centrifugal pumps are the clear dominant category, accounting for about 80% of global revenue in 2025, supported by their broad duty coverage, high efficiency, strong standardization, and superior compatibility with variable-frequency drives and process control systems. This advantage is particularly pronounced in large chemical complexes where standardized equipment platforms and modular project delivery favor proven centrifugal architectures, while diaphragm and screw pumps retain strong positions in dosing, viscous or solids-laden services, and applications requiring pulsation control or gentle handling.

On the application side, chemical transfer pumps primarily serve the chemical industry, transportation, and other scenarios, with the chemical industry as the most concentrated and technically demanding demand center. In 2025, the chemical industry contributes about 59% of global revenue, driven by stringent requirements for corrosion resistance, leakage control, continuous operation, and safety and environmental compliance across critical process units. Transportation-related use cases such as tank farms, loading/unloading, and drum/IBC transfer provide steady demand for safe and controllable transfer solutions, while other applications extend into broader process industries where chemicals are used in production, cleaning, blending, and packaging. Regionally, Asia-Pacific is the largest consumption market, representing about 49% of global revenue in 2025. The region benefits from concentrated chemical capacity, a complete downstream industrial chain, and ongoing scaling and park-based development of chemical manufacturing. Meanwhile, increasing investment in energy efficiency, decarbonization, green manufacturing, and safety and environmental compliance is driving both new project builds and retrofit demand in parallel. China is accelerating progress in EPC delivery capability, import substitution, service network buildout, and digital operations and maintenance, enabling local suppliers to move into

mid-to-high-end applications while strengthening regional supply chains and localized service responsiveness.

Competitive dynamics indicate a moderately concentrated market, with the global top 10 players accounting for about 43% of revenue in 2025. Leading multinational vendors such as Flowserve, KSB, ITT (Goulds Pumps), and PSG have deep portfolios and application know-how in chemical process pumps, diaphragm pumps, and sealless transfer solutions. Teikoku and HERMETIC-Pumpen hold strong influence in sealless routes such as canned motor pumps, supporting high-safety chemical services where leakage avoidance is paramount. NETZSCH is well positioned in positive displacement pumps and complex-media handling, especially for viscous, shear-sensitive, or solids-laden fluids. In parallel, Chinese manufacturers such as Shanghai Kaiquan, Nanfang Pump, Shanghai Liancheng, and Shanghai East Pump continue to expand their presence in Asia-Pacific, leveraging scaled manufacturing, channel reach, and localized delivery and service advantages.

Looking ahead, value creation will increasingly be determined by suppliers' ability to deliver closed-loop capabilities across advanced materials, sealing and sealless containment architectures, system integration, and digital operations. As chemical plants raise requirements for safety, reliability, and energy efficiency, suppliers that can provide robust chemical compatibility engineering, proven leakage-control or sealless solutions, integrated packages with instrumentation and automation interfaces, and fast-response field service will be best positioned to capture higher value share through the industry upgrade cycle and sustain long-term growth.

This report studies the global Chemical Transfer Pumps production, demand, key manufacturers, and key regions.

This report is a detailed and comprehensive analysis of the world market for Chemical Transfer Pumps and provides market size (US\$ million) and Year-over-Year (YoY) Growth, considering 2025 as the base year. This report explores demand trends and competition, as well as details the characteristics of Chemical Transfer Pumps that contribute to its increasing demand across many markets.

Highlights and key features of the study

Global Chemical Transfer Pumps total production and demand, 2021-2032, (K Units)

Global Chemical Transfer Pumps total production value, 2021-2032, (USD Million)

Global Chemical Transfer Pumps production by region & country, production, value, CAGR, 2021-2032, (USD Million) & (K Units), (based on production site)

Global Chemical Transfer Pumps consumption by region & country, CAGR, 2021-2032 & (K Units)

U.S. VS China: Chemical Transfer Pumps domestic production, consumption, key domestic manufacturers and share

Global Chemical Transfer Pumps production by manufacturer, production, price, value

and market share 2021-2026, (USD Million) & (K Units)

Global Chemical Transfer Pumps production by Type, production, value, CAGR, 2021-2032, (USD Million) & (K Units)

Global Chemical Transfer Pumps production by Application, production, value, CAGR, 2021-2032, (USD Million) & (K Units)

This report profiles key players in the global Chemical Transfer Pumps market based on the following parameters - company overview, production, value, price, gross margin, product portfolio, geographical presence, and key developments. Key companies covered as a part of this study include Flowserve, ITT (Goulds Pumps), KSB, PSG, Teikoku, Kaiquan Pump, Nanfang Pump (CNP), NETZSCH, HERMETIC-Pumpen, Shanghai Liancheng, etc.

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

Stakeholders would have ease in decision-making through various strategy matrices used in analyzing the World Chemical Transfer Pumps market

Detailed Segmentation:

Each section contains quantitative market data including market by value (US\$ Millions), volume (production, consumption) & (K Units) and average price (US\$/Unit) by manufacturer, by Type, and by Application. Data is given for the years 2021-2032 by year with 2025 as the base year, 2026 as the estimate year, and 2027-2032 as the forecast year.

Global Chemical Transfer Pumps Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Global Chemical Transfer Pumps Market, Segmentation by Type:

Centrifugal Pumps

Diaphragm Pumps

Screw Pumps

Other Types

Global Chemical Transfer Pumps Market, Segmentation by Sealing/Containment Architecture:

Mechanical Sealed Pumps

Sealless Magnetic-Drive Pumps

Canned Motor Pumps

Others

Global Chemical Transfer Pumps Market, Segmentation by Sales Channel:

Direct Sales

Indirect Sales

Global Chemical Transfer Pumps Market, Segmentation by Application:

Chemical Industry

Transportation

Other Applications

Companies Profiled:

Flowserve

ITT (Goulds Pumps)

KSB

PSG

Teikoku

Kaiquan Pump

Nanfang Pump (CNP)

NETZSCH

HERMETIC-Pumpen

Shanghai Liancheng

Shanghai East Pump

ProMinent

Sulzer

Dalian Huanyou

IDEX

Fill-Rite

Graco

Iwaki

Nikkiso

Dayuan Pumps

Key Questions Answered:

1. How big is the global Chemical Transfer Pumps market?
2. What is the demand of the global Chemical Transfer Pumps market?
3. What is the year over year growth of the global Chemical Transfer Pumps market?
4. What is the production and production value of the global Chemical Transfer Pumps market?
5. Who are the key producers in the global Chemical Transfer Pumps market?
6. What are the growth factors driving the market demand?

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