

Global Oil Recovery Vacuum Pump Supply, Demand and Key Producers, 2026-2032

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Abstracts

The global Oil Recovery Vacuum Pump market size is expected to reach \$ 700 million by 2032, rising at a market growth of 3.8% CAGR during the forecast period (2026-2032).

Oil Recovery Vacuum Pump refers to a dedicated vacuum source used in Stage II gasoline vapour recovery systems at service stations. Installed inside a fuel dispenser or configured as a central station-level unit, the pump generates controlled negative pressure during refuelling and transfers the displaced gasoline vapour–air mixture from the vehicle fill point through the recovery nozzle, coaxial hose and return pipeline to the underground storage tank. The study primarily covers oil-free piston pumps, rotary-vane pumps and jet or ejector vacuum sources, together with integrated motors and essential control modules supplied as pump assemblies. Relevant performance parameters include recovery flow, operating vacuum, air-to-liquid ratio compatibility, explosion protection, condensate tolerance, fuel compatibility, noise, service life and integration with dispenser control systems. Oil Recovery Vacuum Pump products are mainly used in new fuel dispensers, service-station retrofits, replacement and aftermarket maintenance, and centralized vapour-recovery projects.

Key Findings

In 2025, global Oil Recovery Vacuum Pump production reached approximately 144,759 Units. The average price is approximately \$3,400

Ten manufacturers constitute the verified core supply pool for Oil Recovery Vacuum Pump products

Europe and China represent the two principal demand centers for Stage II vapour recovery pumps

Dispenser-mounted distributed pumps account for the largest unit-demand segment

Central vacuum systems command higher average selling prices than individual dispenser pumps

Replacement retrofit and compliance upgrades form the market's principal demand base

Market Trends

The Oil Recovery Vacuum Pump industry is moving from mechanically coupled or fixed-speed configurations toward direct-drive, electronically controlled and sensor-assisted systems. Traditional pumps operating with proportional valves retain a substantial installed base, but variable-speed control provides more precise air-to-liquid ratio management, lower energy consumption and reduced mechanical wear. Product development is increasingly focused on condensate resistance, broader ethanol-fuel compatibility, integrated flame arresters, low-noise operation and simplified calibration. Digital monitoring is also becoming more relevant as service-station operators seek continuous visibility into vapour flow, system pressure and recovery performance. China's GB 20952—2020 strengthens operational, monitoring and maintenance requirements for service-station vapour controls, while current product development by established manufacturers demonstrates the transition toward electronically regulated pump assemblies and software-assisted calibration. Ministry of Ecology and Environment of China Dürr Technik product documentation

Market Dynamics

Drivers

Demand is primarily supported by mandatory VOC-emission controls, periodic replacement of installed pumps and the upgrading of legacy recovery systems. The European Stage II framework continues to require vapour recovery at qualifying new,

refurbished and higher-throughput service stations, while China maintains national requirements covering vapour emissions during fuel unloading, storage and refuelling. Pumps are exposed to frequent starts, hydrocarbon vapours and occasional condensate ingress, creating recurring maintenance and replacement demand even where the number of conventional service stations is stable. European Union Directive 2009/126/EC GB 20952—2020

Restraints

Long-term demand is constrained by vehicle electrification, the gradual contraction of mature gasoline-retailing networks and the growing penetration of onboard refuelling vapour recovery systems. In the United States, widespread ORVR adoption has reduced the regulatory need for Stage II equipment and supported the decommissioning of many installed systems. The market also faces price pressure from refurbished components and low-cost compatible pumps, while the long service life of certified equipment limits the frequency of replacement purchases. United States Environmental Protection Agency

Opportunities

The strongest opportunities lie in replacement of ageing pump fleets, conversion from fixed-speed to electronically regulated systems, integration with online monitoring and expansion into markets where service-station VOC controls are being strengthened. Retrofit packages combining the pump, frequency control, sensors and calibration software can generate higher value than stand-alone replacement units. Suppliers capable of supporting ethanol-blended fuels, extreme operating temperatures, condensate management and compatibility with multiple dispenser platforms are also positioned to address specialized replacement requirements.

Challenges

Manufacturers must balance explosion safety, recovery accuracy, durability and cost within a compact dispenser installation. Certification requirements and technical standards vary by region, increasing product-development and market-entry costs. Field performance can be affected by blocked vapour lines, improper calibration, liquid carryover and inconsistent station maintenance, making pump reliability dependent on the broader recovery system. Limited disclosure by private manufacturers and

overlapping OEM, ODM and branded-supply relationships also reduce market transparency and complicate direct comparisons of supplier scale.

Industry Chain Analysis

The upstream segment supplies explosion-proof motors, aluminium or engineered-metal housings, piston and rotary components, bearings, fuel-resistant seals, flame arresters, frequency converters, sensors and electronic controllers. Component selection must account for hydrocarbon exposure, temperature variation, continuous cycling and hazardous-area requirements. Motor and pump-head assemblies represent the principal hardware cost, while certification, specialized materials, control electronics and long-duration reliability testing create additional barriers to low-cost entry.

The midstream segment covers pump engineering, precision machining, assembly, explosion-protection validation, flow calibration and integration with dispenser-control architecture. Value is created through stable recovery flow, accurate air-to-liquid ratio control, long service life and compatibility with installed dispenser platforms.

Downstream demand comes from fuel-dispenser manufacturers, vapour-recovery system suppliers, service-station operators and retrofit or maintenance contractors. New-dispenser installations provide standardized volume, while replacement and retrofit channels generally deliver higher service content and stronger lifecycle value.

Segment Insights

Dispenser-mounted distributed pumps constitute the largest segment by unit demand because the architecture is widely used in individual fuel dispensers and can support one or multiple fuelling positions. Oil-free piston pumps hold an important position due to their compact design, hydrocarbon resistance and established operating record. Rotary-vane and mechanically driven products remain relevant in price-sensitive and legacy installations, while central vacuum sources represent a smaller-volume but higher-value segment serving multiple dispensers or fuelling points.

Variable-speed electronic control is the most important product-upgrade direction. Compared with fixed-speed pumps regulated by proportional valves, electronically controlled assemblies can adjust vacuum output to fuel flow, reduce unnecessary power consumption and support more consistent recovery performance. Closed-loop systems integrating flow or pressure sensing and self-calibration remain a higher-specification

segment, with adoption concentrated in installations that place greater emphasis on compliance assurance, diagnostic capability and reduced maintenance intervention.

Downstream Market Opportunities

The principal downstream opportunity is the installed service-station base rather than greenfield construction alone. Operators require reliable replacement pumps, retrofit-compatible assemblies and systems that can maintain compliant recovery performance without extensive dispenser modification. High-throughput urban stations, sites subject to online-monitoring requirements and stations upgrading older mechanical systems offer comparatively attractive demand. Emerging-market station construction also provides selective opportunities where vapour-control regulation, fuel-dispenser modernization and local environmental enforcement develop in parallel.

Regional Insights

Europe and China are the two principal demand centers for Oil Recovery Vacuum Pump products, but their supply and purchasing structures differ. Europe is characterized by mature Stage II regulation, a large installed base and strong demand for certified replacement products, electronically controlled upgrades and lifecycle support. China combines a sizeable installed base with national VOC-control requirements and an extensive domestic manufacturing cluster, supporting demand across new-dispenser installation, retrofit and price-sensitive aftermarket channels.

North America presents a mixed outlook. The United States is principally a legacy maintenance and decommissioning market because ORVR-equipped vehicles have reduced the need for Stage II systems, while Mexico and selected regional markets retain equipment opportunities. Other Asia-Pacific countries, the Middle East and Latin America provide project-based demand linked to fuel-retail infrastructure development and environmental regulation, although certification practices and implementation intensity vary substantially.

Competitive Landscape Analysis

The Oil Recovery Vacuum Pump market has a layered and relatively specialized competitive structure. The verified core supply pool comprises ten manufacturers,

supplemented by a broader group of dispenser companies, system suppliers and regional candidates whose pump-manufacturing status is less transparent. Specialist pump manufacturers compete through dedicated designs, long installed histories, explosion-protection certification and compatibility with multiple dispenser brands. Integrated fuel-equipment groups derive an advantage from combining pumps with controls, nozzles, hoses and centralized recovery architecture, enabling system-level sales and access to established service-station channels. Chinese manufacturers compete primarily through cost efficiency, rapid customization, replacement compatibility and localized delivery, with product offerings spanning mechanical, rotary-vane and electronically adjustable designs. Future differentiation will increasingly depend on electronic control, calibration capability, condensate tolerance, fuel compatibility, remote diagnostics and lifecycle service rather than pump capacity alone. Market concentration is therefore higher within internationally certified and integrated solutions than in the broader replacement-pump segment, where regional suppliers and compatible-component manufacturers sustain more fragmented competition.

Report Scope

This report studies the global Oil Recovery Vacuum Pump production, demand, key manufacturers, and key regions.

This report is a detailed and comprehensive analysis of the world market for Oil Recovery Vacuum Pump 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 Oil Recovery Vacuum Pump that contribute to its increasing demand across many markets.

Highlights and key features of the study

Global Oil Recovery Vacuum Pump total production and demand, 2021-2032, (K Units)

Global Oil Recovery Vacuum Pump total production value, 2021-2032, (USD Million)

Global Oil Recovery Vacuum Pump production by region & country, production, value, CAGR, 2021-2032, (USD Million) & (K Units), (based on production site)

Global Oil Recovery Vacuum Pump consumption by region & country, CAGR, 2021-2032 & (K Units)

U.S. VS China: Oil Recovery Vacuum Pump domestic production, consumption, key domestic manufacturers and share

Global Oil Recovery Vacuum Pump production by manufacturer, production, price, value and market share 2021-2026, (USD Million) & (K Units)

Global Oil Recovery Vacuum Pump production by Type, production, value, CAGR, 2021-2032, (USD Million) & (K Units)

Global Oil Recovery Vacuum Pump production by Application, production, value, CAGR, 2021-2032, (USD Million) & (K Units)

This report profiles key players in the global Oil Recovery Vacuum Pump 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 Dürr Technik GmbH & Co. KG, Vontier Corporation (Gilbarco Veeder-Root), Franklin Electric Co., Inc. (Franklin Fueling/HEALY), Dover Corporation (OPW), Zhejiang Galaxy Machinery Manufacture Co., Ltd., Wenzhou Sipu Machinery Co., Ltd., Wenzhou Jiahao Petroleum Machinery Co., Ltd., Suzhou Semiger Technology Co., Ltd., Taizhou First Refrigeration Equipment Co., Ltd., Wenzhou Jiasong Technology Co., Ltd., 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 Oil Recovery Vacuum Pump 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 Oil Recovery Vacuum Pump Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Market Segmentation

Global Oil Recovery Vacuum Pump Market, Segmentation by Type:

Dispenser-mounted Distributed Pump

Central Vacuum Source

Others

Global Oil Recovery Vacuum Pump Market, Segmentation by Control Method:

Fixed-speed with Proportional Valve

Variable-speed Electronic Control

Closed-loop Self-calibrating Control

Others

Global Oil Recovery Vacuum Pump Market, Segmentation by Pumping Speed:

Small: Pumping speed ≤ 100 m³/h

Medium: Pumping speed 100–1000 m³/h

Large: Pumping speed 1000–5000 m³/h

Extra-large: Pumping speed > 5000 m³/h

Global Oil Recovery Vacuum Pump Market, Segmentation by Application:

Oil Refineries

Oil Depots and Refined Product Tank Farms

Gas Station Vapor Recovery Systems

Others

Companies Profiled:

Dürr Technik GmbH & Co. KG

Vontier Corporation (Gilbarco Veeder-Root)

Franklin Electric Co., Inc. (Franklin Fueling/HEALY)

Dover Corporation (OPW)

Zhejiang Galaxy Machinery Manufacture Co., Ltd.

Wenzhou Sipu Machinery Co., Ltd.

Wenzhou Jiahao Petroleum Machinery Co., Ltd.

Suzhou Semiger Technology Co., Ltd.

Taizhou First Refrigeration Equipment Co., Ltd.

Wenzhou Jiasong Technology Co., Ltd.

TATSUNO Corporation

Key Questions Answered

1. How big is the global Oil Recovery Vacuum Pump market?
2. What is the demand of the global Oil Recovery Vacuum Pump market?
3. What is the year over year growth of the global Oil Recovery Vacuum Pump market?
4. What is the total value of the global Oil Recovery Vacuum Pump market?
5. Who are the Major Players in the global Oil Recovery Vacuum Pump market?
6. What are the growth factors driving the market demand?

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