

Pumps Market by Product Type (Centrifugal Pump, Positive Displacement Pump), Application (Agriculture, Construction and Building Services, Water and Wastewater, Power Generation, Oil and Gas, Chemical, and Others), and Region 2024-2032

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Abstracts

The global pumps market size reached US\$ 75.2 Billion in 2023. Looking forward, IMARC Group expects the market to reach US\$ 98.0 Billion by 2032, exhibiting a growth rate (CAGR) of 2.9% during 2024-2032. The increasing product demand in the construction industry, extensive research and development (R&D) activities, and the significant growth in the oil and gas industry are some of the key factors driving the market.

Pumps are mechanical devices designed to transfer fluids, whether liquids or gases, from one location to another. Their operation can be manual or powered by external energy sources. These versatile devices are constructed using various materials like plastics, ceramics, composites, and metals such as cast iron, stainless steel, or aluminum. A typical pump comprises an outer casing, a rotating component to generate fluid flow, inlet and outlet ports, bearings, an electric motor, and a control system. Available in various sizes, from small residential to large industrial ones, they play a vital role in diverse industries. They enhance productivity, efficiency, and reliability while efficiently transporting liquids across long distances and at high flow rates. Industries like agriculture, construction, water and wastewater treatment, power generation, oil and gas, and chemical processing rely on them to facilitate various processes and operations. They are indispensable devices with widespread applications, driving efficiency and progress in numerous industrial sectors.

The global market is primarily driven by growing industrialization and urbanization. In

line with this, the increasing demand for water and wastewater treatment is significantly contributing to the market. Expansion of the oil and gas industry worldwide is offering numerous opportunities for the market. Furthermore, the rising demand for energy-efficient pumps is positively influencing the market. Apart from this, the rapid advancements in pump technology and design is catalyzing the market. Moreover, the escalating number of infrastructure development projects and the increasing agricultural activities and irrigation needs are propelling the market. Besides, the rising construction and building services sector is bolstering the market. Additionally, the growing demand for process automation and the expansion of the chemical processing industry is providing a boost to the market.

Pumps Market Trends/Drivers:

The emergence of smart and IoT-enabled pumps

The emergence of smart and IoT-enabled pumps has been a significant factor driving innovation and growth in the market. These advanced products have sensors, connectivity, and data analytics capabilities, enabling real-time monitoring and remote control. The integration of Internet of Things (IoT) technology allows the products to communicate with centralized systems, providing valuable insights into performance, efficiency, and maintenance needs. Smart pumps offer numerous benefits, such as predictive maintenance, early fault detection, and optimized energy consumption. Continuous data monitoring can identify potential issues before they escalate, reducing downtime and maintenance costs. Additionally, IoT-enabled pumps contribute to enhanced process automation and overall system efficiency. Industries like water and wastewater management, industrial processes, and building services have rapidly adopted smart pumps to optimize operations and resource utilization. As the demand for IoT-enabled solutions grows, the market is expected to expand further, revolutionizing fluid handling processes and bolstering sustainability efforts.

Expansion of the mining industry

The expansion of the mining industry has significantly impacted the market. As mining operations extend to remote and challenging locations, the demand for robust and reliable pumps has increased. The products are crucial in mining processes, including dewatering, slurry transport, and mineral processing. Efficient products are essential for extracting minerals and handling various slurries and mine water types. They are used in open-pit and underground mines to manage water inflow and ensure safe working conditions. Additionally, they are critical for transferring mineral-laden slurries for further processing and transportation. The increasing focus on sustainable mining practices

has also driven the demand for energy-efficient and environmentally friendly products. Mining companies seek products that can handle high pressures and abrasive materials while minimizing energy consumption and reducing the environmental impact. As the mining industry continues to grow to meet the global demand for minerals and resources, the need for products that can withstand harsh operating conditions and deliver reliable performance is expected to rise, fueling the expansion of the market.

Increasing investment in water management projects

The increasing investment in water management projects is favorably impacting the market. With rising concerns about water scarcity and the need for efficient water utilization, governments and organizations worldwide are allocating substantial funds to improve water infrastructure and management. Pumps are vital in water management projects, including water supply and distribution, wastewater treatment, desalination, and flood control. As the global population grows and urbanization intensifies, the demand for effective water management solutions has intensified. Investments in modernizing aging water infrastructure, implementing smart water networks, and adopting advanced pump technologies have become crucial to ensure sustainable water usage and resilience against climate change impacts. Moreover, the increasing focus on environmental sustainability has driven the demand for energy-efficient and eco-friendly products to minimize power consumption and reduce the carbon footprint in water management projects. As the world confronts water-related challenges, the continued investment in water management projects will continue to bolster the market, addressing critical water supply and management needs.

Pumps Industry Segmentation:

IMARC Group provides an analysis of the key trends in each segment of the global pumps market report, along with forecasts at the global, regional, and country levels from 2024-2032. Our report has categorized the market based on product type, and application.

Breakup by Product Type:

- Centrifugal Pump
- Axial Flow Pump
- Radial Flow Pump
- Mixed Flow Pump
- Positive Displacement Pump
- Reciprocating Pump

Rotary Pump
Others

Centrifugal pump dominates the market

The report has provided a detailed breakup and analysis of the market based on the product type. This includes centrifugal pump (axial, radial, and mixed flow pumps), positive displacement pump (reciprocating and rotary pumps), and others. According to the report, centrifugal pump represented the largest segment.

Centrifugal pumps are widely used in various industries due to their efficiency, versatility, and reliability in fluid handling applications. Within this segment, different types of centrifugal pumps, such as axial, radial, and mixed-flow, cater to diverse requirements across industries.

Axial flow pumps are ideal for applications with high flow rates and low head requirements, commonly used in water supply and irrigation systems. Radial flow ones are suitable for high-pressure applications, making them prevalent in oil and gas, chemical, and power generation industries. Mixed flow pumps balance axial and radial flow, serving drainage, flood control, and cooling applications.

Furthermore, the extensive adoption of centrifugal in water management, industrial processes, construction, and mining sectors showcases their significance in driving the pump market. Their adaptability to various fluid types and operating conditions makes them a preferred choice for fluid transportation, contributing to the overall market growth and industrial development.

Breakup by Application:

Agriculture
Construction and Building Services
Water and Wastewater
Power Generation
Oil and Gas
Chemical
Others

Water and wastewater dominates the market

The report has provided a detailed breakup and analysis of the market based on the application. This includes agriculture, construction and building services, water and wastewater, power generation, oil and gas, chemical, and others. According to the report, water and wastewater represented the largest segment.

With the increasing global population and rapid urbanization, the demand for efficient water supply and wastewater treatment systems has escalated. Pumps are essential in these applications to ensure proper water circulation, treatment, and distribution. In water supply systems, they extract water from wells, lift water to higher elevations, and distribute water to residential, commercial, and industrial consumers. They enable efficient water transportation over long distances and across challenging terrains.

In wastewater treatment processes, they facilitate the movement of wastewater through various treatment stages, including screening, sedimentation, filtration, and disinfection. They ensure effective treatment and safe disposal of wastewater, protecting the environment and public health. The critical role of pumps in the water and wastewater sector has led to continuous advancements in pump technology, emphasizing energy efficiency, reliability, and sustainability. As global efforts intensify to address water scarcity and improve sanitation, the demand for the product in water and wastewater applications is expected to propel the market.

Breakup by Region:

North America

United States

Canada

Asia-Pacific

China

Japan

India

South Korea

Australia

Indonesia

Others

Europe

Germany

France

United Kingdom

Italy

Spain
Russia
Others
Latin America
Brazil
Mexico
Others
Middle East and Africa

Asia Pacific exhibits a clear dominance, accounting for the largest market share

The report has also provided a comprehensive analysis of all the major regional markets, which include North America (the United States and Canada); Asia Pacific (China, Japan, India, South Korea, Australia, Indonesia, Russia, and others); Europe (Germany, France, the United Kingdom, Italy, Spain, and others); Latin America (Brazil, Mexico, and others); and the Middle East and Africa. According to the report, Asia Pacific represented the largest market.

With a large and diverse population, Asia Pacific witnesses increased water consumption, necessitating efficient water management systems and boosting the adoption of pumps in water supply and wastewater treatment applications. The region's rapid industrialization, urbanization, and infrastructural developments have fueled the demand for products across various industries. Furthermore, the expanding construction, mining, and oil and gas sectors rely heavily on pumps for material handling, dewatering, and fluid transportation.

Additionally, the expanding agricultural activities in the Asia Pacific drive the demand for products in irrigation systems and agricultural processes. Moreover, the growing focus on energy efficiency and sustainability in the region encourages the adoption of eco-friendly and energy-efficient pump technologies. The presence of prominent pump manufacturers and the rise of smart and IoT-enabled pump solutions also contribute to the region's market growth. As Asia Pacific continues its economic growth trajectory, the demand for the products across diverse industries is expected to strengthen, making the region a significant market driver.

Competitive Landscape:

Top companies are contributing to the market growth through various strategies and initiatives. They are continuously investing in research and development to innovate and offer more efficient and advanced pump technologies. These companies focus on

understanding customer needs and tailor their products to specific industry requirements, expanding their market presence. Moreover, the key manufacturers establish strong global distribution networks, ensuring their products are readily available in different regions. They also provide comprehensive after-sales support and maintenance services, enhancing customer satisfaction and loyalty. Collaborations with key industry players, such as mining, water management, and oil and gas companies, enable them to address specific market demands effectively. Additionally, their commitment to sustainability leads to the development of eco-friendly and energy-efficient pumps, aligning with growing environmental concerns. By consistently delivering high-quality products and solutions that meet industry demands, top companies fuel market growth and maintain their competitive edge in the dynamic and evolving industry.

The report has provided a comprehensive analysis of the competitive landscape in the pumps market. Detailed profiles of all major companies have also been provided. Some of the key players in the market include:

Baker Hughes Company

Ebara Corporation

Flowserve Corporation

Grundfos Holding A/S

ITT Inc.

KSB SE & Co. KGaA

Pentair plc

Schlumberger Limited

Sulzer Ltd.

The Weir Group PLC

Vaughan Co. Inc.

Xylem Inc

Recent Developments:

In October 2020, Baker Hughes announced a collaboration with Snam, one of Europe's leading natural gas infrastructure companies, to develop new solutions for reducing carbon dioxide emissions in the natural gas sector. The collaboration aims to advance carbon capture, utilization, and storage (CCUS) technologies, which may affect the natural gas industry pumps.

In December 2020, Ebara Corporation announced its investment in Boreal Light GmbH, a German cleantech company. This investment is part of Ebara's efforts to expand its business in the water business domain and promote clean water solutions globally.

Flowserve Corporation partnered strategically with JSC Tatneft, one of Russia's leading

oil and gas companies, to supply pumping equipment for an ambitious modernization project at Tatneft's TANECO refinery. The collaboration aimed to enhance the refinery's efficiency and reliability through advanced pumping solutions.

Key Questions Answered in This Report

1. How big is the global pumps market?
2. What is the expected growth rate of the global pumps market during 2024-2032?
3. What are the key factors driving the global pumps market?
4. What has been the impact of COVID-19 on the global pumps market?
5. What is the breakup of the global pumps market based on the product type?
6. What is the breakup of the global pumps market based on the application?
7. What are the key regions in the global pumps market?
8. Who are the key players/companies in the global pumps market?

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