

Split Case Pump Market - Forecast from 2026 to 2031

<https://marketpublishers.com/r/S1775B4A53EBEN.html>

Date: January 2026

Pages: 154

Price: US\$ 3,950.00 (Single User License)

ID: S1775B4A53EBEN

Abstracts

The split case pump market is forecasted to rise at a 6.2% CAGR, reaching USD 12.562 billion in 2031 from USD 8.757 billion in 2025.

The split case pump market is a well-established segment within the industrial pump industry, characterized by centrifugal pumps whose casings are horizontally or axially split along the shaft centerline. This fundamental design feature allows for the upper half of the casing to be removed, providing direct and convenient access to the impeller, shaft, and bearings without disturbing the pump's alignment or connected piping. This ease of maintenance is a primary value proposition, making split case pumps the preferred choice for high-flow, low-to-medium head applications where reliability and serviceability are critical. The market serves a broad range of essential infrastructure and process industries, including water and wastewater management, oil and gas, power generation, mining, and agriculture. Its growth is driven by continuous investment in these core sectors, urbanization, and the need for efficient, reliable fluid handling in large-scale systems.

Core Design Advantages and Operational Characteristics

The defining attribute of the split case design is its maintenance-friendly configuration. By enabling internal inspection and component replacement without disconnecting the pump from the pipeline, downtime is significantly reduced compared to end-suction or vertically suspended pumps. This is crucial for mission-critical services like municipal water supply or refinery processes.

These pumps are engineered for high-volume fluid transfer. They typically feature a double-volute casing design (in many models) to balance radial loads on the impeller, enhancing bearing life and allowing for stable operation over a wide range of duties. Common configurations include single-stage, double-suction impellers, which further

improve hydraulic balance and allow for higher flow rates at a given speed. They are predominantly mounted in a horizontal orientation, though vertical split case designs also exist for space-constrained installations.

Key Market Drivers and Application Demand

Demand is anchored in several capital-intensive, fluid-dependent industries. Municipal water and wastewater infrastructure represents a major, steady application area. Split case pumps are workhorses in raw water intake, primary and secondary treatment processes, and clean water distribution networks for cities and industrial plants, driven by global urbanization and the need for water security.

The oil and gas industry is another significant driver, utilizing these pumps for crude oil transfer within pipelines and terminals, water injection for secondary recovery, and various process applications in refineries and petrochemical plants. Investment in pipeline networks, LNG facilities, and refinery capacity directly translates to pump demand.

In agriculture, particularly for large-scale irrigation and drainage projects, split case pumps are employed to move massive volumes of water efficiently. The need to enhance agricultural productivity and manage water resources supports ongoing demand.

Furthermore, the power generation sector uses these pumps for condenser cooling water circulation, boiler feedwater service (in specific configurations), and other auxiliary services in thermal power plants, supporting a consistent replacement and upgrade market.

Market Challenges and Competitive Dynamics

A notable challenge is the perception of higher initial capital cost and maintenance complexity compared to simpler pump types like end-suction centrifugals. While the total cost of ownership over the lifecycle may be favorable due to easier servicing, the upfront investment can be a barrier for some users, particularly in cost-sensitive markets.

The market also faces competition from alternative pump technologies such as vertical turbine pumps for deep wells or large-diameter single-stage pumps, which may offer advantages in specific spatial or hydraulic conditions. Additionally, the cyclical nature of

capital investment in key end-user industries like oil and gas and mining can lead to fluctuating demand.

Regional Market Dynamics

The Asia-Pacific region is the dominant and fastest-growing market. This is propelled by massive and ongoing investments in water infrastructure, rapid industrialization, significant agricultural activity, and expanding oil & gas and power sectors in countries like China, India, and Southeast Asian nations. Government initiatives focused on urbanization, irrigation, and energy security are key regional growth catalysts.

North America and Europe represent mature but substantial markets, characterized by demand for replacement, system upgrades, and efficiency improvements in existing municipal and industrial infrastructure. Stricter environmental and efficiency regulations in these regions also drive the replacement of older, less efficient pumps with modern, optimized split case models.

Competitive Landscape and Strategic Focus

The market is served by global pump manufacturers and specialized industrial equipment suppliers. Competition is based on hydraulic efficiency, mechanical reliability, product range (covering various sizes and materials of construction), and the strength of after-sales service and support networks.

Strategic development is focused on enhancing energy efficiency and smart capabilities. Manufacturers are investing in computational fluid dynamics (CFD) to optimize impeller and volute designs for reduced energy consumption. The integration of condition monitoring sensors and compatibility with Industrial Internet of Things (IIoT) platforms for predictive maintenance is becoming a key differentiator. There is also continuous innovation in advanced materials for wear parts to extend service life in abrasive or corrosive applications, such as in mining or slurry handling. Furthermore, companies are expanding their service and lifecycle management offerings, moving beyond equipment sales to provide long-term maintenance contracts and performance guarantees.

Market Outlook

The split case pump market is positioned for steady, long-term growth, underpinned by the perpetual need to move large volumes of water and process fluids for civilization's

basic infrastructure. While it is a mature technology, its evolution is being shaped by the digital transformation of industry and the global emphasis on energy and operational efficiency.

Future growth will be increasingly driven by modernization projects in developed economies and greenfield infrastructure development in emerging regions. Innovation will continue to focus on reducing lifecycle costs through improved reliability, easier maintenance, and lower power consumption. As water scarcity concerns intensify and industries seek to optimize resource use, the role of efficient, robust pumping solutions like the split case pump will remain indispensable. Success for manufacturers will depend on their ability to deliver not just a reliable mechanical product, but a connected, efficient asset that contributes to the sustainability and resilience of their customers' operations.

Key Benefits of this Report:

Insightful Analysis: Gain detailed market insights covering major as well as emerging geographical regions, focusing on customer segments, government policies and socio-economic factors, consumer preferences, industry verticals, and other sub-segments.

Competitive Landscape: Understand the strategic maneuvers employed by key players globally to understand possible market penetration with the correct strategy.

Market Drivers & Future Trends: Explore the dynamic factors and pivotal market trends and how they will shape future market developments.

Actionable Recommendations: Utilize the insights to exercise strategic decisions to uncover new business streams and revenues in a dynamic environment.

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Report Coverage:

Historical data from 2022 to 2024 & forecast data from 2025 to 2031

Growth Opportunities, Challenges, Supply Chain Outlook, Regulatory Framework, and Trend Analysis

Competitive Positioning, Strategies, and Market Share Analysis

Revenue Growth and Forecast Assessment of segments and regions including countries

Company Profiling (Strategies, Products, Financial Information, and Key Developments among others.

Key Segment:

By Type

Axially Split-Case Pumps

Vertical Split-Case Pumps

Horizontal Split-Case Pumps

Single Stage Horizontal Split Case Pumps

Multistage Split-Case Pumps

By Material

Bronze

Steel

Carbon Steel

Stainless Steel

Others

By End-User Industry

Oil & Gas

Mining

Water Treatment

Agriculture

Others

By Geography

North America

USA

Canada

Mexico

South America

Brazil

Argentina

Others

Europe

Germany

France

United Kingdom

Spain

Others

Middle East and Africa

Saudi Arabia

UAE

Others

Asia Pacific

China

India

Japan

South Korea

Indonesia

Thailand

Others

Contents

1. EXECUTIVE SUMMARY

2. MARKET SNAPSHOT

- 2.1. Market Overview
- 2.2. Market Definition
- 2.3. Scope of the Study
- 2.4. Market Segmentation

3. BUSINESS LANDSCAPE

- 3.1. Market Drivers
- 3.2. Market Restraints
- 3.3. Market Opportunities
- 3.4. Porter's Five Forces Analysis
- 3.5. Industry Value Chain Analysis
- 3.6. Policies and Regulations
- 3.7. Strategic Recommendations

4. TECHNOLOGICAL OUTLOOK

5. SPLIT CASE PUMP MARKET BY TYPE

- 5.1. Introduction
- 5.2. Axially Split-Case Pumps
- 5.3. Vertical Split-Case Pumps
- 5.4. Horizontal Split-Case Pumps
- 5.5. Single Stage Horizontal Split Case Pumps
- 5.6. Multistage Split-Case Pumps

6. SPLIT CASE PUMP MARKET BY MATERIAL

- 6.1. Introduction
- 6.2. Bronze
- 6.3. Steel
 - 6.3.1. Carbon Steel
 - 6.3.2. Stainless Steel

6.4. Others

7. SPLIT CASE PUMP MARKET BY END-USER

7.1. Introduction

7.2. Oil & Gas

7.3. Mining

7.4. Water Treatment

7.5. Agriculture

7.6. Others

8. SPLIT CASE PUMP MARKET BY GEOGRAPHY

8.1. Introduction

8.2. North America

8.2.1. USA

8.2.2. Canada

8.2.3. Mexico

8.3. South America

8.3.1. Brazil

8.3.2. Argentina

8.3.3. Others

8.4. Europe

8.4.1. Germany

8.4.2. France

8.4.3. United Kingdom

8.4.4. Spain

8.4.5. Others

8.5. Middle East and Africa

8.5.1. Saudi Arabia

8.5.2. UAE

8.5.3. Others

8.6. Asia Pacific

8.6.1. China

8.6.2. India

8.6.3. Japan

8.6.4. South Korea

8.6.5. Indonesia

8.6.6. Thailand

8.6.7. Others

9. COMPETITIVE ENVIRONMENT AND ANALYSIS

9.1. Major Players and Strategy Analysis

9.2. Market Share Analysis

9.3. Mergers, Acquisitions, Agreements, and Collaborations

9.4. Competitive Dashboard

10. COMPANY PROFILES

10.1. Sulzer Ltd

10.2. JEE Pumps

10.3. Ruhrpumpen Inc. (Corporacion E.G)

10.4. Pentair Plc

10.5. Xylem Inc.

10.6. Sintech Precision Products Ltd

10.7. DMW Corporation

11. APPENDIX

11.1. Currency

11.2. Assumptions

11.3. Base and Forecast Years Timeline

11.4. Key Benefits for the Stakeholders

11.5. Research Methodology

11.6. Abbreviations

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