

Global Urea Metering Pump Market Growth 2026-2032

<https://marketpublishers.com/r/GF0F628BE6A1EN.html>

Date: July 2026

Pages: 170

Price: US\$ 3,660.00 (Single User License)

ID: GF0F628BE6A1EN

Abstracts

The global Urea Metering Pump market size is predicted to grow from US\$ 1516 million in 2025 to US\$ 2389 million in 2032; it is expected to grow at a CAGR of 6.5% from 2026 to 2032.

A urea metering pump is the urea solution delivery and dosing component in SCR/SNCR DeNOx systems. It draws urea solution from a tank or reservoir, establishes supply pressure, and delivers a stable flow to injectors according to engine or flue gas conditions. The system includes the pump body, urea supply modules with sensors/valves, automotive urea pump assemblies, marine SCR urea pump modules, and industrial fixed-source urea dosing pump stations. The estimated overall gross margin is approximately 24%.

Urea metering pumps are key actuators in SCR systems, with demand primarily following the installation and replacement cycles of diesel vehicles, off-road machinery, marine engines, and industrial fixed-source DeNOx units. The automotive segment accounts for the largest volume, driven by new vehicle installation and aftermarket replacements. Marine and industrial units have higher unit prices but fewer projects.

Declines in European passenger diesel vehicles may suppress some demand, but heavy trucks, construction machinery, agricultural equipment, mining machines, ships, and industrial environmental retrofits continue to support growth. The automotive SCR system market is estimated at USD 11.46 billion in 2025 and USD 12.0 billion in 2026, indicating that SCR aftertreatment remains a sizable aftermarket, with urea metering pumps representing only a portion of this market.

OEM-supplied pumps face price pressure from vehicle manufacturers, resulting in lower margins, while aftermarket replacements, marine pump modules, industrial dosing stations, and high-flow customized products achieve higher margins. Key barriers

include resistance to urea crystallization and corrosion, low-temperature heating and draining, flow stability, lifespan verification, automotive certification, and system compatibility.

LP Information, Inc. (LPI) ' newest research report, the 'Urea Metering Pump Industry Forecast' looks at past sales and reviews total world Urea Metering Pump sales in 2025, providing a comprehensive analysis by region and market sector of projected Urea Metering Pump sales for 2026 through 2032. With Urea Metering Pump sales broken down by region, market sector and sub-sector, this report provides a detailed analysis in US\$ millions of the world Urea Metering Pump industry.

This Insight Report provides a comprehensive analysis of the global Urea Metering Pump landscape and highlights key trends related to product segmentation, company formation, revenue, and market share, latest development, and M&A activity. This report also analyzes the strategies of leading global companies with a focus on Urea Metering Pump portfolios and capabilities, market entry strategies, market positions, and geographic footprints, to better understand these firms' unique position in an accelerating global Urea Metering Pump market.

This Insight Report evaluates the key market trends, drivers, and affecting factors shaping the global outlook for Urea Metering Pump and breaks down the forecast by Integration Level, by Application, geography, and market size to highlight emerging pockets of opportunity. With a transparent methodology based on hundreds of bottom-up qualitative and quantitative market inputs, this study forecast offers a highly nuanced view of the current state and future trajectory in the global Urea Metering Pump.

This report presents a comprehensive overview, market shares, and growth opportunities of Urea Metering Pump market by product type, application, key manufacturers and key regions and countries.

Segmentation by Integration Level:

Pump Only

Pump with Controls

Pump with Tank

Pump Station

Other Forms

Segmentation by Pump Type:

Diaphragm Pump

Gear Pump

Plunger Pump

Peristaltic Pump

Other Pumps

Segmentation by Drive Type:

Motor-Driven

Solenoid-Driven

Pneumatic-Driven

Hydraulic-Driven

Others

Segmentation by Flow Class:

Micro Flow

Small Flow

Medium Flow

Large Flow

Extra-Large Flow

Segmentation by Application:

Vehicle SCR

Equipment SCR

Marine & Rail SCR

Power SCR

Industrial Urea-SCR

Others

This report also splits the market by region:

Americas

United States

Canada

Mexico

Brazil

APAC

China

Japan

Korea

Southeast Asia

India

Australia

Europe

Germany

France

UK

Italy

Russia

Middle East & Africa

Egypt

South Africa

Israel

Turkey

GCC Countries

The below companies that are profiled have been selected based on inputs gathered from primary experts and analysing the company's coverage, product portfolio, its market penetration.

Bosch

Cummins

Schaeffler Vitesco

Albonair

Fluid-o-Tech

Scherzinger

W?rtsil?

Mitsubishi Heavy Industries

Taiko Kikai

ProMinent

LEWA

Milton Roy

Lutz-Jesco

SEKO

Iwaki

Verder

Watson-Marlow

ActBlue

Xi?an Qintai

FAI Electronics

Kailong High Technology

Yinlun

JONSN

S-Fluid

ET Pump

Weifu Lida

Tianbang

Key Questions Addressed in this Report

What is the 10-year outlook for the global Urea Metering Pump market?

What factors are driving Urea Metering Pump market growth, globally and by region?

Which technologies are poised for the fastest growth by market and region?

How do Urea Metering Pump market opportunities vary by end market size?

How does Urea Metering Pump break out by Integration Level, by Application?

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