

Canned Motor Pumps Market by Type (Standard Basic Pumps, Reverse Circulation Pumps, High Temperature Pumps, Self-Priming Pumps, Others), By End User (Chemical, Oil & Gas, Power, Refrigeration, Others), Capacity (Low, Medium, High), Installation Type (Vertical, Horizontal), Motor Type (Synchronous Motors, Induction Motors, Permanent Magnet Motors), Pump Design (Single-Stage, Multistage) and Region - Global Forecast to 2030

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Abstracts

The global canned motor pumps market is projected to reach USD 2.27 billion by 2030, up from USD 1.68 billion in 2025, registering a CAGR of 6.2% over the forecast period. Rapid industrialization is a major factor driving the use of canned motor pumps across different sectors. As countries develop their manufacturing capabilities and infrastructure, they need reliable, efficient, and safe fluid handling solutions. Canned motor pumps have a hermetically sealed design that provides excellent protection against leaks, making them perfect for applications that involve hazardous or corrosive fluids. The key end-use industries of canned motor pumps include chemical processing, oil & gas, power generation, and water treatment. The push for industrial growth not only increases the demand for these pumps but also supports global trends aimed at energy efficiency and protecting the environment. Stricter regulations and the need to reduce environmental impact encourage industries to use canned motor pumps, which require low maintenance and offer high reliability. Furthermore, developments in automation, digital technology, and materials science allow these pumps to operate under tougher conditions, supporting ongoing industrial growth and modernization efforts.

'The medium capacity segment is estimated to account for the largest share of the canned motor pumps market during the forecast period.'

The medium capacity segment is expected to account for the largest share in the canned motor pumps market in the coming years. Medium capacity canned motor pumps are designed to handle moderate flow rates and pressures. They often serve as a foundation for process industries. These pumps usually manage balanced flow rates between 50 and 200 m³/h. They are appreciated for their reliability, energy efficiency, and compact design. They are widely used in chemical, petrochemical, and oil & gas industries, where it is crucial to handle aggressive or flammable liquids without leaks. The main reason for choosing medium capacity canned motor pumps is their ability to operate without leaks, minimize maintenance downtime, and provide operational flexibility.

'The power segment is projected to be the fastest-growing end user during the forecast period.'

The power segment is the fastest-growing end user in the global canned motor pumps market, registering a CAGR of 6.9% during the forecast period. In the power industry, canned motor pumps are essential for safe, reliable, and efficient movement of fluids. They are especially important for tasks like circulating cooling water in nuclear power plants and managing boiler feed water and condensate in thermal power plants. In nuclear power plants, canned motor pumps usually work in systems that move radioactive or ultra-pure fluids. This includes primary coolant circuits, borated water systems, chemical volume control systems (CVCS), and reactor feedwater operations. Their strong construction allows them to work well under high pressure, high temperature, and high radiation. This ensures the safe and steady operation of crucial nuclear processes. Their compact, sealed design leads to lower noise levels and makes it easier to fit them into plant systems. This improves both operational efficiency and environmental safety. The main reason for using canned motor pumps in the power sector is their proven reliability, low maintenance needs, and ability to operate safely in extreme conditions.

By region, Asia Pacific is expected to account for the largest share of the canned motor pumps market during the forecast period.

In 2024, Asia Pacific had the largest share of the global canned motor pumps market. The countries in this region include China, Japan, India, Australia, South Korea, and the

Rest of Asia Pacific. China is the biggest market in the region. Key factors driving the market in the region are the demand for reliable, maintenance-free pumping solutions that reduce environmental contamination and operational downtime. The addition of smart technologies and IoT-based monitoring is speeding up adoption, as these features improve efficiency and safety. Government support for green technology and ongoing investments in industrial modernization are likely to keep the market strong in the Asia Pacific region.

In-depth interviews have been conducted with various key industry participants, subject-matter experts, C-level executives of key market players, and industry consultants, among other experts, to obtain and verify critical qualitative and quantitative information and assess future market prospects. The distribution of primary interviews is as follows:

By Company Type: Tier 1 - 45%, Tier 2 - 30%, and Tier 3 - 25%

By Designation: C-Level - 35%, Managers - 25%, and Others - 40%

By Region: North America - 27%, Europe - 20%, Asia Pacific - 33%, Middle East & Africa - 12%, and South America - 8%

Note: The tiers of the companies are defined based on their total revenues as of 2023.

Tier 1: > USD 1 billion, Tier 2: From USD 500 million to USD 1 billion, and Tier 3:

HERMETIC-Pumpen GmbH (Germany), TEIKOKU ELECTRIC MFG. CO., LTD.

(Japan), Nikkiso Co., Ltd. (Japan), Crispumps (Moldova), Kirloskar Brothers Limited

(India), OPTIMEX (France), ChemmP (Kaimipu Pump (Suzhou) Co., Ltd.) (China),

MONIBA ANAND ELECTRICALS PVT. LTD. (India), ANHUI SHINHOO CANNED

MOTOR PUMP CO., LTD. (China), Hayward Tyler Ltd. (England), and HERMAG

Pumps (Czech Republic) are some of the key players in the canned motor pumps

market. The study includes an in-depth competitive analysis of these key players in the

canned motor pumps market, with their company profiles, recent developments, and

key market strategies.

Research Coverage:

The report defines, describes, and forecasts the canned motor pumps market by type (Standard Basic Pumps, Reverse Circulation Pumps, High Temperature Pumps, Self-Priming Pumps, Others), by end user (Chemical, Oil & Gas, Power, Refrigeration, Others), by capacity (Low, Medium, High), by installation type (Vertical, Horizontal), by motor type (Synchronous Motors, Induction Motors), by pump design (Single-Stage, Multistage), and by region (North America, Europe, Asia Pacific, Middle East & Africa, and South America). The scope of the report covers detailed information regarding the

major factors, such as drivers, restraints, challenges, and opportunities, influencing the growth of the canned motor pumps market. A detailed analysis of the key industry players has been done to provide insights into their business overview, solutions, and services; key strategies; contracts, partnerships, agreements, mergers & acquisitions; and recent developments associated with the canned motor pumps market.

Key Benefits of Buying the Report

Analysis of key drivers (Rapid industrialization in Asia Pacific, Stringent safety and environmental regulation), restraints (High upfront cost, Limited power output), opportunities (Rising demand for safe handling of hazardous and toxic Fluids, Growth in oil & gas and chemical industries), and challenges (Competition from alternate technologies, Skilled workforce requirement) influencing the growth of the canned motor pumps market.

Product Development/Innovation: The canned motor pump industry is undergoing rapid transformation, propelled by technological innovation and evolving industrial demands. Recent advancements focus on enhancing energy efficiency, operational reliability, and environmental sustainability. Key innovations include the integration of smart technologies such as IoT and AI, enabling real-time monitoring, predictive maintenance, and remote diagnostics for optimized performance and reduced downtime.

Market Development: In January 2025, Torishima Pump Mfg Co. Ltd. of Osaka, Japan, and HERMETIC-Pumpen GmbH of Germany formed a business alliance focused on the ammonia fuel sector. The aim of this collaboration is to jointly develop and supply advanced pumping systems capable of safely handling and transferring large volumes of liquefied ammonia, which is gaining attention as a next-generation, carbon-neutral energy source.

Market Diversification: In January 2023, Nikkiso Co., Ltd. completed the acquisition of Cryotec Anlagenbau GmbH through its Nikkiso Clean Energy & Industrial Gases Group. Cryotec is a German plant engineering and construction company specializing in air separation, liquefaction plants, and CO₂ technologies. This strategic move aims to expand Nikkiso's footprint in Europe, enhance its expertise in carbon capture, biogas, and cryogenic solutions, and support the group's sustainability and climate-neutral goals.

Competitive Assessment: In-depth assessment of market shares, growth

strategies, and service offerings of leading players like HERMETIC-Pumpen GmbH (Germany), TEIKOKU ELECTRIC MFG. CO., LTD. (Japan), Nikkiso Co., Ltd. (Japan), Crispumps (Moldova), Kirloskar Brothers Limited (India), OPTIMEX (France), ChemmP (Kaimipu Pump (Suzhou) Co., Ltd.) (China), MONIBA ANAND ELECTRICALS PVT. LTD. (India), ANHUI SHINHOO CANNED MOTOR PUMP CO., LTD. (China), Hayward Tyler Ltd. (England), and HERMAG Pumps (Czech Republic), among others, in the canned motor pumps market.

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