

Submersible Pumps Market by Type (Electric, Hydraulic, Air-Driven), Application (Open Pit, Borewell), Operation (Single-stage, Multi-stage), Power Rating (15 HP), Sector (Industrial, Agricultural, Domestic), Region - Global Forecasts to 2025

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Abstracts

The submersible pumps market is projected to reach USD 15.5 billion by 2025 from an estimated USD 11.2 billion in 2020, at a CAGR of 6.7% during the forecast period. Increasing investments in construction industry attributing to rapid urbanization, and high demand for submersible pumps in agricultural sector are the key factors driving the growth of the submersible pumps market. Likewise, the up-gradation of aging and construction of new water & wastewater treatment facilities and adoption of solar-powered submersible pumps are expected to offer lucrative opportunities for the submersible pumps market during the forecast period. However, motor failure & high troubleshooting cost hinder the growth of the market.

“The open pit, by application, is expected to be the fastest-growing market from 2020 to 2025.”

The open-pit segment is projected to grow at the highest CAGR from 2020 to 2025. Open-pit submersible pump does not require a separate foundation or a pump house; it operates directly under submerged conditions. Open pit submersible pumps are expected to witness the highest demand from industrial applications, particularly from the water supply and treatment sector, as well as the mining and construction industries, where they play an important role in dewatering open pits.

“The electrical submersible pumps, by type, is expected to be the largest market from 2020 to 2025.”

The report segments the submersible pumps market, by type, into electrical, hydraulic, and air-driven. The electrical segment is expected to hold the largest market share, and grow at the highest CAGR during the forecast period owing to its high reliability and efficiency, and as it never has to be primed as it is already submerged in the fluid. These pumps can handle both solids & liquids and are used across numerous sectors to boost production.

“Asia Pacific: The fastest growing region in the submersible pumps market.”

Asia Pacific is expected to grow at the highest CAGR during the forecast period. Asia Pacific region has been segmented, by country, into China, India, Australia, Indonesia, Japan, and Rest of Asia Pacific. Rest of Asia Pacific includes Malaysia, Thailand, Philippines, and South Korea. The region's domination can be attributed to rapid economic expansion. The region is attracting investors to set up production facilities because of the availability of raw materials and labor at lower prices. Industrial activities are growing due to low manufacturing costs and the support of the local governments. Increasing investments in R&D is also one of the factors driving the submersible pumps market in Asia Pacific.

Breakdown of Primaries:

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, as well as to assess future market prospects. The distribution of primary interviews is as follows:

By Company Type: Tier 1- 59%, Tier 2- 26%, and Tier 3- 15%

By Designation: C-Level- 62%, D-Level- 20%, and Others- 18%

By Region: Asia Pacific- 30%, North America- 25%, Europe- 20%, Middle East & Africa – 15%, and South America-10%

Note: “Others” include sales managers, engineers, and regional managers

The tiers of the companies are defined based on their total revenue as of 2019: Tier 1:

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

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*Details on Business and Financial Overview, Products Offered, Recent Developments, and MnM View (Key Strategies/Right to Win, Strategic Choices Made, Weaknesses and Competitive Threats) might not be captured in case of unlisted companies.

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About

It is observed that the top four submersible pump providing companies had around XX% of the market share by value, out of which the top two companies held around XX% of the total share. The others had about XX% of the total market share. This indicates that the competition amongst submersible pump providers is very high. The key strategies used to improve market share were to form agreements, launch new products, expand, and perform mergers and acquisitions with submersible pump manufacturers and leading suppliers by understanding the economic scenario. The other strategies included forming long-term relationships and providing highly competent project management efficiencies. A few companies retaining most of the market share indicate that since the number of submersible pump manufacturers needed for oil fields process is very few, even one or two high value contracts can affect the market share to a great extent.

Market segmentation by geography:

In this report, based on geography, the submersible pump market is segmented into five major zones: Asia-Pacific, Europe, The Middle East and Africa, North America, and South America. Asia-Pacific is the highest user of submersible pump as of 2013.

Asia-Pacific market has the highest share of XX% in submersible pump market globally, due to the emphasis of the countries in this region to reduce their dependency on imports and improve their domestic energy market. The region is occupied by major oilfield activities going on, thus proving it to occupy highest position in the submersible pump market. The North American market holds the second position followed by European market which is at third position. South America holds the lowest position as compared to the other regions.

Market restraints:

There are a number of factors which restrain the growth of submersible pump market. The limitations of achieving full potential of pumped wells may affect the performance negatively.

This performance may sometimes be quite severe, resulting in unstable pump operation, significant production losses, lower reliability, and increased operational costs due to premature equipment failure. Thus, as studied, the factors that restrain the

growth of artificial lifts are lack of qualified engineers and equipment selection and operation.

Lack of qualified engineers:

The pump sector is experiencing dwindling human resource since a decade. This situation arises due to issues such as change in professional interests, risky work conditions, and negative perceptions of environmental hazards. This shortage of human resource has seriously affected many energy and power companies, and oil & gas service companies in providing their services. This may lead to disturbance in the pump market.

The industry necessitates proficient staff to be involved in training, research and development. A future deficit is expected in the production of oil and gas related equipment due to unavailability of skilled labor. Equipment manufacturers and service providers face trouble in employing and training employees to handle equipment related duties. Provision of training delivery has become difficult in this sector for products which require manpower in designing, manufacturing, operating, and their maintenance in future.

Equipment selection and operation:

Proper equipment selection is an important restraining factor. Submersible pump users may often underestimate the potential well problems that may develop as well inflow increases and reservoir pressure decreases due to the use of submersible pump systems. To gain the necessary pump robustness and operating flexibility, one needs to anticipate harmful conditions and select the appropriate metallurgies and equipment configurations to handle those conditions effectively.

Unfortunately, accurately selected electrical submersible pumps (ESPs) will bring little benefit if they are not installed and operated properly. Competent pump assembly, installation, and commissioning are critical as first steps in deployment.

ESP service technicians must be competent at a multitude of electrical, electronic, and mechanical skills. They must also have knowledge of the specific equipment being installed.

ESP installation also centers on the competency and experience of the rig crew. Crews with limited ESP experience can easily damage system components, cable, and

connectors as they run the ESP system to setting depth. Consequently, successful ESP installation requires experienced and trained personnel involved in installation and commissioning.

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