

Europe, Middle-East And Africa Diaphragm Pump - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2024 - 2029)

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Abstracts

The Europe, Middle-East And Africa Diaphragm Pump Market size is estimated at USD 2.68 billion in 2024, and is expected to reach USD 3.55 billion by 2029, growing at a CAGR of 5.80% during the forecast period (2024-2029).

Key Highlights

Over the medium term, the growing demand for oil and gas, recovery in oil price, increasing number of onshore and offshore fields reaching their maturity with exploration, and increased production activities are expected to make a shift toward deeper offshore regions. This is expected to result in a growing number of offshore ultra-deepwater projects, driving the diaphragm pump market during the forecast period.

Technological advancements in alternative options of conventional pumps, such as solar pumps, are expected to hinder the growth of the diaphragm pump market during the forecast period.

The manufacturing of pumps in Europe and the Middle East utilizes a combination of 3D printing technology with computer modeling, leading to cutting-edge development in pump design, repair, and replacement. This will drive the growth of the diaphragm pump market globally in the coming years.

Europe dominated the market globally in 2022, with the majority of the demand coming from Germany and United Kingdom, owing to rising economies and growing population.

Europe, Middle-East And Africa Diaphragm Pump Market Trends

The Water and Wastewater Sector will Dominate the Market

Wastewater is produced by most human and industrial activities that use water. As water demand grows, the quantity of wastewater produced and its overall pollution load continuously increase worldwide. As a result, governments across Europe and the Middle East and Africa have introduced strict policies and regulations regarding wastewater treatment for both the municipal and industrial sectors.

Around two-thirds of Africa's population lives in areas that experience water scarcity for at least one month a year. Around 50% of the people facing this level of water scarcity live in Ethiopia, Liberia, Libya, Somalia, and South Sudan. The demand for wastewater treatment, produced as a result of human and industrial sector water usage, is expected to grow to improve the efficiency of water usage and meet the water demands.

As the growth of the urban population increases the consumption of water, new water distribution systems are built to fulfill the requirements of the urban population. For instance, to solve water supply problems by developing the water and wastewater infrastructure in Buzău County, Romania, the European Commission approved an investment of more than EUR 127 million from the Cohesion Fund in June 2022.

Africa is home to over 1.4 billion people, and the population is expected to reach 1.7 billion by 2030. This is a huge increase from 480 million in 1980. Almost 60% of the continent's population lives in rural areas, where sanitation services and access to safe drinking water lag behind those in urban areas. As of 2023, nearly 6.5 lakh people will be living in urban areas. Thus, Africa has significant potential in the wastewater treatment industry. Various companies are investing in the industry, which is expected to boost the demand for pumps in the forecast period.

In March 2023, the European Commission approved a Cohesion Fund investment of more than EUR 159 million to develop a water and wastewater infrastructure in Iași County, Romania. This new major project is anticipated to improve access to water and sewerage in Iași County. The project is expected to install 256 kilometers of main pipes and 312 kilometers of water distribution network. It will also construct 23 water treatment facilities, 43 water storage containers, and 50 pumping units, 43 of which will be network-based and seven within treatment facilities.

Owing to the above-mentioned factors, the water and wastewater sector is expected to dominate the Europe and Middle and Africa diaphragm pump market.

Germany is Expected to Dominate the Market

The diaphragm pump employs chemical and physical separation techniques and aids in the removal of harmful effluents. Diaphragm pumps generally handle various viscous fluids with solid particles, hazardous compounds, or liquids in Germany. Bulk transfer, refining, circulation drilling mud transfer, waste processing, refueling, loading and unloading, and wellhead injection are all examples of applications where these types of pumps are used.

The food and beverage industry, chemical manufacturing, and power plants are well-established sectors in Germany. It boosts the use of diaphragm pumps in various industrial phases. Environmental and human health protection is vitally important in Germany. Its importance resulted in adequate water and wastewater treatment systems. Practically, all wastewater in Germany is treated to satisfy the highest European Union standards.

In Germany, households and certain industries in 3913 urban areas generate 111.3 million p.e. of wastewater every day, which is an amount equivalent to around 223 million bathtubs or 22.25 million m³. However, urban wastewater must be treated before discharge to avoid environmental pollution. In Germany, urban wastewater is treated in 3,796 plants across the country before it is discharged.

Thus, various companies are investing in the industry to cater to the rising demand for water treatment in the country. For instance, in January 2024, Membion received an investment of around EUR 5 million. With the multi-patented technology, municipal and industrial wastewater treatment plant operators can meet the growing demands on water quality and significantly reduce operating costs. These types of investments are expected to boost the demand for diaphragm pumps during the forecast period.

In October 2023, Hydro announced that it aims to invest EUR 3 million in a new water treatment plant at the Schwandorf legacy site in Germany. Hydro is carrying out the project at Schwandorf in close collaboration with local authorities and with support from local expertise. Over the next two years, Hydro plans to invest approximately EUR 5-6 million at the legacy sites in Schwandorf and Stulln in the Region of Oberpfalz.

Owing to the above-mentioned factors, Germany is expected to dominate the Europe

and Middle East and Africa diaphragm pump market during the forecast period.

Europe, Middle-East And Africa Diaphragm Pump Industry Overview

The Europe and Middle East and Africa diaphragm pump market is moderately fragmented. Some of the major players in the market include Dover Corporation, Ingersoll-Rand PLC, IDEX Corporation, Atlas Copco AB., and Tapflo Group.

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Contents

1 INTRODUCTION

- 1.1 Scope of the Study
- 1.2 Market Definition
- 1.3 Study Assumptions

2 RESEARCH METHODOLOGY

3 EXECUTIVE SUMMARY

4 MARKET OVERVIEW

- 4.1 Introduction
- 4.2 Market Size and Demand Forecast in USD billion, till 2029
- 4.3 Recent Trends and Developments
- 4.4 Government Policies and Regulations
- 4.5 Market Dynamics
 - 4.5.1 Drivers
 - 4.5.1.1 Increasing Demand for Oil and Gas
 - 4.5.1.2 Growing Water and Wastewater Industry
 - 4.5.2 Restraints
 - 4.5.2.1 Technological Advancements in the Alternative Options of Conventional Pumps
- 4.6 Supply Chain Analysis
- 4.7 PESTLE Analysis

5 MARKET SEGMENTATION

- 5.1 Battery type
 - 5.1.1 Lead-Acid
 - 5.1.2 Lithium-ion
 - 5.1.3 Other Battery Type

6 COMPETITIVE LANDSCAPE

- 6.1 Mergers and Acquisitions, Joint Ventures, Collaborations, and Agreements
- 6.2 Strategies Adopted by Leading Players

6.3 Company Profiles

6.3.1 Dover Corporation

6.3.2 Ingersoll-Rand PLC

6.3.3 Flowserve Corporation

6.3.4 IDEX Corporation

6.3.5 Ingersoll-Rand PLC

6.3.6 Tapflo Group

6.3.7 Atlas Copco AB

7 MARKET RANKING/SHARE ANALYSIS**

8 MARKET OPPORTUNITIES AND FUTURE TRENDS

8.1 Increasing Deep-water and Ultra Deep Water Explorations

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