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Progressing Cavity Pumps (PCP) Market Forecasts to 2030 – Global Analysis By Product Type (Dosing Pumps, Flanged Pumps, Hopper Pumps, Food Grade Pumps, Vertical Pumps, Downhole Pumps and Other Product Types), Power Rating, Pumping Capacity, Stage Type, Technology, Application, End User and By Geography

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Abstracts

According to Stratistics MRC, the Global Progressing Cavity Pumps (PCP) Market is accounted for $2.54 billion in 2024 and is expected to reach $3.79 billion by 2030 growing at a CAGR of 6.9% during the forecast period. Progressing Cavity Pumps (PCPs) are positive displacement pumps designed to handle highly viscous, abrasive, or shear-sensitive fluids. They operate using a rotor and stator mechanism, where the rotor's helical motion creates cavities that transport fluid in a continuous, non-pulsating flow. These pumps are ideal for transferring sludges, slurries, and fluids with solids or delicate materials, making them suitable for industries like oil & gas, water treatment, food processing, and chemicals. Their efficiency and reliability make them valuable for demanding applications.

Market Dynamics:

Driver:

Growth in water & wastewater treatment

The need for effective wastewater management systems is growing as a result of increased industrialization, urbanization, and strict environmental restrictions. PCPs are

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perfect for sludge dewatering, chemical dosing, and carrying both treated and untreated wastewater because of their exceptional ability to handle viscous and abrasive fluids. Additionally, their non-pulsating flow decreases the possibility of system clogs, boosting operating efficiency. Especially in emerging economies, governments and corporate organizations are making significant investments in modernizing water infrastructure. These elements are driving market expansion by encouraging the use of PCPs in the water and wastewater treatment industry.

Restraint:

Complexity of system debugging & maintenance

For some applications, competing alternatives including centrifugal pumps, diaphragm pumps, and peristaltic pumps are frequently chosen because of their lower initial prices, easier designs, or capacity to handle specific fluid types. For example, diaphragm pumps perform exceptionally well in handling chemicals with minimum danger of leakage, while centrifugal pumps are preferred for high-flow, low-viscosity fluids. These substitutes lessen dependency on PCPs since they are frequently simpler to maintain and run under less taxing circumstances. This rivalry from alternative technologies restricts the growth of the PCP market in some segments.

Opportunity:

Rising adoption in food & beverage and chemical industries

PCPs are perfect for working with viscous, shear-sensitive, and abrasive liquids that are frequently used in these industries, including chemicals, oils, syrups, sauces, and creams. They are particularly useful in applications requiring precise control, such component mixing, dosing, and transfer, because they can deliver a smooth, continuous flow without altering the fluid's characteristics. Additionally, they are more appealing in food processing due to their hygienic design and adherence to food safety regulations. PCPs help meet the growing market need in the chemical sector by handling harsh chemicals, slurries, and polymers.

Threat:

Operational challenges with abrasive materials

PCPs can perform considerably worse when working with abrasive materials, including

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slurries that contain sand, gravel, or other solid particles, even though they are made to handle viscous fluids. The rotor and stator of the pump may become worn down by these materials, decreasing its effectiveness and necessitating regular maintenance or part replacements. Particularly in applications where abrasive materials are frequently used, some companies may be discouraged from selecting PCPs due to the higher operating costs and possible downtime caused by wear on vital components. Because of this, it is still difficult to find strong, long-lasting pump designs in these kinds of environments.

Covid-19 Impact

The COVID-19 pandemic had a mixed impact on the Progressing Cavity Pumps (PCP) market. Disruptions in global supply chains, labor shortages, and project delays in industries like oil & gas, water treatment, and food processing slowed growth. However, the demand for PCPs in wastewater management, healthcare-related applications, and food processing saw a rise due to heightened hygiene standards and the need for efficient fluid handling. Overall, while short-term challenges were significant, long-term growth potential remained intact.

The flanged pumps segment is expected to be the largest during the forecast period

The flanged pumps segment is estimated to be the largest, due to their standardized connections. They are widely used in industries such as oil & gas, water & wastewater treatment, and chemical processing, where efficient fluid handling and reliable operation are crucial. Additionally, the growing emphasis on industrial automation and remote monitoring further fuels the demand for flanged pumps, as they can be easily integrated into automated systems.

The dewatering segment is expected to have the highest CAGR during the forecast period

The dewatering segment is anticipated to witness the highest CAGR during the forecast period, due to their ability to handle challenging fluids with high solids content, abrasives, and varying viscosities. These pumps excel in applications where other pump types struggle, such as dewatering construction sites, mines, and wastewater treatment plants. Additionally, their gentle pumping action minimizes shear stress on sensitive materials, making them suitable for handling slurries and other delicate substances.

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Region with largest share:

Asia Pacific is expected to have the largest market share during the forecast period due to the need for effective fluid management solutions is greatly increased by the fast urbanization and industrialization. In addition to expenditures in water and wastewater treatment facilities, the region's growing oil and gas industry also contributes to market expansion. Furthermore, government programs to provide access to clean water and sanitation, as well as growing environmental concerns, are encouraging the use of PCPs in a variety of industries, making them necessary for efficient sludge and wastewater handling.

Region with highest CAGR:

During the forecast period, the North America region is anticipated to register the highest CAGR, owing to increasing investments in oil & gas exploration and production activities, growing demand for efficient water and wastewater treatment solutions, and rising industrial automation. Additionally, the region's focus on energy efficiency and environmental sustainability is driving the adoption of PCPs due to their low energy consumption and minimal environmental impact.

Key players in the market

Some of the key players profiled in the Progressing Cavity Pumps (PCP) Market include Schlumberger Limited, Weatherford International plc, Halliburton Company, Baker Hughes Company, National Oilwell Varco, Inc., NETZSCH Pumps & Systems, SEEPEX GmbH, PCM Group, ITT Inc., CIRCOR International, Inc., Xylem Inc., Verder Group, Sulzer Ltd., Flowserve Corporation, SPX FLOW, Inc., Moyno, Abaque Pumps, Progressing Cavity Pumps Ltd., Pumpenfabrik Wangen GmbH, and Liberty Process Equipment, Inc.

Key Developments:

In October 2024, NETZSCH unveiled an economical and hermetically sealed upgrade for its NEMO progressing cavity pumps, with this new design enhancing safety by preventing the release of toxic liquids and gases, while also offering cost savings as the sealing systems do not require maintenance

In June 2024, CIRCOR announces launch of Allweiler FE flexi-shaft progressing cavity pump for lithium battery applications at achema. CIRCOR International, Inc., a leading

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manufacturer and marketer of differentiated technology products and sub-systems, announces the launch of the Allweiler FE Flexi-Shaft Progressing Cavity (PC) Pump for lithium battery applications.

Product Types Covered:

- Dosing Pumps
- Flanged Pumps
- Hopper Pumps
- Food Grade Pumps
- Vertical Pumps
- Downhole Pumps
- Other Product Types

Power Ratings Covered:

- Less than 50 HP
- 50–150 HP
- Above 150 HP

Pumping Capacities Covered:

- Up to 500 GPM
- 501 to 1000 GPM
- Above 1000 GPM

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Stage Types Covered:

- Single Stage (90-PSI)
- Double Stage (180-PSI)
- Four Stage (360-PSI)
- Eight Stage (720-PSI)

Technologies Covered:

- Horizontal Progressing Cavity Pumps
- Vertical Progressing Cavity Pumps

Applications Covered:

- Dewatering
- Dosing
- Sludge Handling
- Oil Extraction
- Chemical Processing
- Other Applications

End Users Covered:

- Water & Wastewater Treatment
- Food & Beverage

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- Oil & Gas
- Paper & Pulp
- Other End Users

Regions Covered:

- North America
  - US
  - Canada
  - Mexico
- Europe
  - Germany
  - UK
  - Italy
  - France
  - Spain
  - Rest of Europe
- Asia Pacific
  - Japan
  - China
  - India

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- Australia
- New Zealand
- South Korea
- Rest of Asia Pacific

South America

- Argentina
- Brazil
- Chile
- Rest of South America

Middle East & Africa

- Saudi Arabia
- UAE
- Qatar
- South Africa
- Rest of Middle East & Africa

What our report offers:
- Market share assessments for the regional and country-level segments
- Strategic recommendations for the new entrants
- Covers Market data for the years 2022, 2023, 2024, 2026, and 2030
- Market Trends (Drivers, Constraints, Opportunities, Threats, Challenges, Investment Opportunities, and recommendations)
- Strategic recommendations in key business segments based on the market estimations

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- Competitive landscaping mapping the key common trends
- Company profiling with detailed strategies, financials, and recent developments
- Supply chain trends mapping the latest technological advancements

Free Customization Offerings:

All the customers of this report will be entitled to receive one of the following free customization options:

Company Profiling

Comprehensive profiling of additional market players (up to 3)

SWOT Analysis of key players (up to 3)

Regional Segmentation

Market estimations, Forecasts and CAGR of any prominent country as per the client's interest (Note: Depends on feasibility check)

Competitive Benchmarking

Benchmarking of key players based on product portfolio, geographical presence, and strategic alliances

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Table 38 Global Progressing Cavity Pumps (PCP) Market Outlook, By Other End Users (2022-2030) ($MN)

Note: Tables for North America, Europe, APAC, South America, and Middle East & Africa Regions are also represented in the same manner as above.

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