

# **Metering Pump Market ? Global Industry Size, Share, Trends, Opportunity, and Forecast, Segmented By Type (Diaphragm, Piston, Peristaltic), By Application (Water & Wastewater Treatment, Oil & Gas, Chemicals & Petrochemicals, Pharmaceuticals, Food & Beverages, Others), By Region & Competition, 2021-2031F**

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## **Abstracts**

The Global Metering Pump Market is projected to expand from USD 7.38 Billion in 2025 to USD 10.09 Billion by 2031, registering a CAGR of 5.35%. Defined as positive displacement devices capable of injecting precise liquid volumes within specific timeframes, metering pumps are essential for accurate flow control in industrial settings. This growth is largely driven by increasing requirements for wastewater treatment and the broadening chemical processing sector, both of which demand exact additive dosing to ensure operational integrity. The Water Environment Federation noted in 2024 that the U.S. Environmental Protection Agency anticipates a \$630 billion investment need for national wastewater infrastructure over the next two decades, highlighting a significant demand for fluid management technologies.

However, market expansion faces obstacles due to the volatility of raw material costs, specifically regarding the metals and polymers essential for pump manufacturing. These fluctuations introduce uncertainty into production expenses and profit margins, complicating efforts to sustain stable pricing structures for end-users. As a result, this financial instability can impede long-term procurement strategies and delay capital investments, potentially halting projects in regions where budget constraints are stringent and price sensitivity is high.

## Market Driver

Stringent global regulations governing water and wastewater treatment are generating sustained demand for precise fluid management, necessitating the adoption of advanced metering pumps. Both municipal and industrial facilities are increasingly required to modernize aging infrastructure to meet stricter environmental standards for effluent discharge, a process that demands the accurate dosing of pH adjusters, disinfectants, and coagulants. This regulatory environment fuels substantial capital expenditure; for instance, Water UK announced a 'Record Investment Plan' in March 2024, with companies planning to invest ?14.4 billion between 2024 and 2025—the highest annual investment in the sector's history—thereby supporting the integration of essential dosing systems.

Concurrently, the growth of the chemical processing and manufacturing sectors reinforces this upward market trajectory, as these industries depend on metering pumps for the precise injection of inhibitors, catalysts, and additives. According to the American Chemistry Council's 'Mid-Year 2024 Chemical Industry Situation and Outlook' released in June 2024, U.S. chemical output is forecast to rise by 2.2% in 2024, signaling a recovery that stimulates equipment procurement. Furthermore, the energy sector is contributing to this demand; the International Energy Agency reported in 2024 that global upstream oil and gas investment is projected to grow by 7% to USD 570 billion, creating additional opportunities for high-pressure metering applications within harsh extraction environments.

## Market Challenge

A significant impediment to the Global Metering Pump Market is the volatility of raw material prices, particularly regarding the metals and polymers necessary for pump construction. Manufacturers rely heavily on these inputs, yet erratic cost fluctuations generate substantial uncertainty concerning production expenses. This instability compels producers to frequently adjust pricing strategies, resulting in unpredictable cost increases for end-users that erode profit margins and complicate the establishment of competitive, long-term supply agreements, ultimately destabilizing financial planning for large-scale operations.

This economic unpredictability directly restricts market growth by discouraging capital investment across key industrial sectors. Faced with volatile equipment prices, price-sensitive industries such as chemical processing and wastewater management often postpone or cancel procurement initiatives to prevent budget overruns. The broader

impact of these delays is reflected in general industrial equipment trends; the VDMA (Mechanical Engineering Industry Association) estimated that global sales of machinery and equipment would decline by 1.5% in 2024 compared to the prior year, illustrating how persistent material instability and cost pressures stifle the acquisition of vital fluid management technologies.

## **Market Trends**

The integration of Industrial Internet of Things (IIoT) capabilities is fundamentally transforming the market, with operators increasingly deploying smart pumping systems featuring predictive maintenance tools. This technological evolution facilitates real-time monitoring of vibration, pressure, and flow rates, enabling facilities to predict component failures early and minimize expensive unplanned downtime. Industries are utilizing advanced digital control interfaces to transition from basic dosing to fully automated, data-centric fluid management strategies; Xylem's '2023 Sustainability Report' from May 2024 highlighted that their intelligent technologies helped customers save over 3.5 billion cubic meters of non-revenue water by the end of 2023, confirming the operational effectiveness of connected systems.

In parallel, there is a decisive shift toward energy-efficient brushless DC motor technology and the use of Variable Frequency Drives (VFDs) for precision control. Facing increasing pressure to decarbonize and lower operational costs, manufacturers are substituting traditional AC motors with advanced brushless designs that provide superior turn-down ratios and reduced power consumption. This advancement is vital for water treatment and chemical applications requiring high dosing accuracy without energy waste; Grundfos reported in its 'Annual Report 2023' (March 2024) a 9% year-on-year reduction in total CO2 emissions alongside an expanded portfolio of energy-efficient solutions, reflecting the industry's commitment to eco-efficient operations.

## **Key Market Players**

Seepax GmbH

SPX Flow Technology

Lewa GmbH

Milton Roy Company

IDEX Corporation

Seko S.p.A.

Swelore Engineering Private Limited

Mcfarland-Tritan LLC

Watson-Marlow Fluid Technology Group

Dover Corporation

## Report Scope

In this report, the Global Metering Pump Market has been segmented into the following categories, in addition to the industry trends which have also been detailed below:

### Metering Pump Market, By Type

Diaphragm

Piston

Peristaltic

### Metering Pump Market, By Application

Water & Wastewater Treatment

Oil & Gas

Chemicals & Petrochemicals

Pharmaceuticals

Food & Beverages

Others

## Metering Pump Market, By Region

### North America

United States

Canada

Mexico

### Europe

France

United Kingdom

Italy

Germany

Spain

### Asia Pacific

China

India

Japan

Australia

South Korea

### South America

Brazil

Argentina

Colombia

Middle East & Africa

South Africa

Saudi Arabia

UAE

### **Competitive Landscape**

Company Profiles: Detailed analysis of the major companies present in the Global Metering Pump Market.

### **Available Customizations:**

Global Metering Pump Market report with the given market data, TechSci Research offers customizations according to a company's specific needs. The following customization options are available for the report:

### **Company Information**

Detailed analysis and profiling of additional market players (up to five).

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