

# **Hydraulic Gear Pump Market – Global Industry Size, Share, Trends, Opportunity, and Forecast, Segmented By Product (External Gear, Internal Gear), By End-Use (Construction, Mining & Metallurgy, Automotive, Transportation, Architecture, Chemicals & Petrochemicals, Others), By Operating Pressure (Less than 100 Bar, 100–300 Bar, Above 300 Bar), By Region & Competition, 2020-2030F**

<https://marketpublishers.com/r/H8BB2DDBD4F5EN.html>

Date: February 2025

Pages: 185

Price: US\$ 4,500.00 (Single User License)

ID: H8BB2DDBD4F5EN

## **Abstracts**

The Global Hydraulic Gear Pump Market was valued at USD 9.16 billion in 2024 and is expected to reach USD 11.91 billion by 2030 with a CAGR of 4.47% through 2030. A hydraulic gear pump is a type of positive displacement pump commonly used in hydraulic systems to transfer fluid through the system by utilizing the meshing of gears. These pumps are typically employed to generate a flow of hydraulic fluid that powers machinery and equipment, particularly in applications that require consistent and high-pressure fluid delivery. Hydraulic gear pumps are favored for their simple design, compact size, reliability, and efficiency in handling various types of fluids, such as oils and hydraulic fluids, making them suitable for diverse industries like construction, agriculture, automotive, and manufacturing. The market for hydraulic gear pumps is poised for significant growth driven by several factors. As industries increasingly rely on hydraulic power systems for heavy equipment and machinery, the demand for efficient and durable hydraulic pumps is growing. The construction sector, for example, requires hydraulic gear pumps to power excavators, bulldozers, and cranes, leading to a rise in demand for these pumps.

Similarly, the automotive industry, with its increasing use of hydraulic systems in

vehicles and manufacturing processes, further fuels market growth. The agricultural sector's adoption of hydraulic-powered machinery such as tractors and harvesters boosts the demand for hydraulic gear pumps, as they offer superior reliability and minimal maintenance. Technological advancements in hydraulic gear pumps, such as improvements in materials, design for energy efficiency, and noise reduction features, are also contributing to the growth of the market. The expanding infrastructure and industrial activities in developing regions are creating new opportunities for market expansion. As industries push for higher performance, greater energy efficiency, and cost-effective solutions, hydraulic gear pumps will remain a key component of hydraulic systems, further driving their adoption. The increasing focus on automation and technological advancements in pump efficiency will continue to support the growth of the hydraulic gear pump market in the coming years.

## Key Market Drivers

### Rising Demand for Heavy Machinery in Construction and Infrastructure Development

One of the key drivers of growth in the Hydraulic Gear Pump Market is the increasing demand for heavy machinery in construction and infrastructure development. As urbanization accelerates and infrastructure projects expand globally, industries such as construction, mining, and material handling require efficient, durable, and powerful hydraulic systems to operate machinery like excavators, bulldozers, cranes, and loaders. Hydraulic gear pumps are integral to these systems, offering consistent fluid transfer under high pressure, which is essential for the reliable functioning of such heavy equipment. With governments across the world investing in infrastructure projects, including roads, bridges, airports, and residential complexes, the demand for hydraulic-powered machinery has surged, directly benefiting the hydraulic gear pump market. The rise of smart and automated construction machinery, which relies on hydraulic systems for operation, further drives the need for high-performance hydraulic gear pumps. The ongoing trend toward modernization and mechanization in the construction sector continues to drive the adoption of hydraulic gear pumps, providing a substantial growth opportunity for manufacturers and suppliers in the global market. As industries push for more efficient machinery to increase productivity, the demand for hydraulic gear pumps, which ensure operational efficiency and longevity, is expected to grow steadily. The global urban population is projected to reach 68% by 2050, up from 55% in 2018.

### Increased Adoption of Hydraulic Systems in the Agricultural Sector

The agricultural sector has become another significant driver of the Hydraulic Gear Pump Market, as the industry increasingly adopts hydraulic systems in farming equipment. Modern farming techniques and the need for higher productivity have led to the widespread adoption of machinery such as tractors, harvesters, planters, and irrigation systems, many of which rely on hydraulic power. Hydraulic gear pumps are critical in providing the required pressure and flow to operate the hydraulic circuits in agricultural machinery, facilitating the smooth operation of critical functions like lifting, plowing, and steering. As global food demand rises and the need for more efficient and scalable agricultural solutions increases, hydraulic-powered machines provide the necessary capabilities to enhance productivity and reduce manual labor. The trend toward precision farming, which involves the use of advanced technology for optimized crop management, further drives the adoption of hydraulic systems. This sector's growing reliance on hydraulic-powered solutions for soil preparation, planting, and harvesting activities creates a robust demand for hydraulic gear pumps, positioning this market for steady growth in the coming years. The increasing mechanization in agriculture, especially in emerging economies, is expected to continue propelling the growth of hydraulic gear pumps, making them essential components in the agricultural machinery market. The total global farmland area is estimated to be around 5 billion hectares. A significant portion of this land is cultivated using machinery that relies on hydraulic systems, including gear pumps, for various operations.

### Growth in the Automotive and Manufacturing Sectors

The automotive and manufacturing sectors are major contributors to the demand for hydraulic gear pumps, driving market growth across the globe. In the automotive industry, hydraulic systems are essential for a wide range of applications, including power steering, braking systems, suspension systems, and various other functions that require precise, high-pressure fluid transfer. Hydraulic gear pumps are integral to ensuring smooth operation in these systems, providing the necessary power for vehicle movement and control. With the growing production of commercial vehicles, heavy-duty trucks, and specialized machinery, the demand for hydraulic gear pumps remains strong in the automotive sector. In manufacturing, hydraulic systems are extensively used in machinery such as presses, injection molding machines, and machine tools, where high-force operations are necessary. As the automotive and manufacturing sectors continue to expand, especially in emerging economies, the demand for hydraulic gear pumps to support more efficient, higher-performing machinery and systems is expected to increase. The adoption of automation and advanced technologies in these sectors further reinforces the need for hydraulic gear pumps to enable precision and reliability in complex manufacturing processes. As industries

continue to prioritize efficiency and automation, the hydraulic gear pump market is well-positioned to benefit from ongoing growth in automotive and manufacturing applications. The global population is projected to reach 9.7 billion by 2050, leading to a significant increase in food demand. To meet this demand, agricultural productivity needs to increase, which will likely involve further adoption of advanced technologies, including hydraulic systems.

### Expansion of Oil and Gas Exploration Activities

The expansion of oil and gas exploration activities is a critical driver for the Hydraulic Gear Pump Market, particularly in the upstream segment of the oil and gas industry. Hydraulic systems play an essential role in oil and gas extraction, where hydraulic gear pumps are used to power drilling rigs, lifting equipment, and other machinery. The need for efficient, reliable pumps that can operate in harsh environments, such as deepwater drilling platforms or offshore rigs, is crucial to the success of oil and gas operations. With the growing demand for energy and the exploration of new oil fields in remote and challenging locations, the need for hydraulic gear pumps is expected to increase. Hydraulic systems are used for various tasks in oil refineries, including fluid handling, filtration, and material movement, creating a sustained demand for these pumps in the industry. The growth of shale oil production and the increasing focus on deepwater and offshore exploration will further drive the demand for hydraulic gear pumps, as these operations require specialized equipment capable of enduring harsh conditions. The global push for energy security and the expansion of oil and gas production capacity are expected to continue driving the growth of the hydraulic gear pump market, particularly in energy-heavy regions such as North America, the Middle East, and Africa. As the oil and gas industry evolves, the need for reliable hydraulic gear pumps remains pivotal to supporting the smooth functioning of extraction and refining processes. It is estimated that the world needs to invest around USD 97 trillion in infrastructure by 2040 to keep pace with population growth and economic development. This massive investment will fuel the demand for construction equipment that relies heavily on hydraulic systems.

### Key Market Challenges

#### High Initial and Maintenance Costs

One of the primary challenges faced by the Hydraulic Gear Pump Market is the high initial investment and ongoing maintenance costs associated with these pumps. Hydraulic gear pumps, especially those designed for industrial applications such as construction, oil and gas, and heavy machinery, require significant capital expenditure,

which can be a deterrent for small and medium-sized businesses. While these pumps are known for their reliability and efficiency, the upfront costs of purchasing and installing high-performance hydraulic gear pumps can be substantial. In addition to the initial costs, these pumps require regular maintenance and servicing to ensure optimal performance. This includes periodic lubrication, replacement of seals and bearings, and the monitoring of fluid cleanliness and pressure levels. For industries operating in cost-sensitive environments or those with limited budgets, these high operational costs can present significant challenges. Some hydraulic gear pumps may experience wear and tear over time due to constant exposure to high pressures, potentially leading to costly repairs or replacement. For organizations that operate on thin profit margins or in volatile market conditions, managing the high operational expenses associated with hydraulic gear pumps becomes increasingly difficult. To mitigate these challenges, companies are often required to invest in advanced monitoring systems or predictive maintenance technology, which can add to the cost burden. The need for skilled labor to maintain and repair hydraulic systems is another contributing factor that increases costs. As such, the combination of high initial and maintenance costs is a considerable barrier to the widespread adoption of hydraulic gear pumps, particularly in regions where industries are more price-sensitive.

### Technological Limitations and Performance Constraints

Another significant challenge for the Hydraulic Gear Pump Market is the technological limitations and performance constraints associated with these pumps. While hydraulic gear pumps are renowned for their efficiency and simplicity, they are not without their drawbacks. One of the main limitations is their relatively low efficiency when compared to other types of hydraulic pumps, such as axial piston or radial piston pumps, particularly at higher pressures or variable flow rates. Hydraulic gear pumps typically operate at constant flow rates, which can make them less adaptable for applications where flow needs fluctuate. This limits their application in industries requiring precise control over flow, such as in advanced automation processes or variable-speed operations. While hydraulic gear pumps are durable, they can be prone to issues such as cavitation, which occurs when the pump experiences a drop in pressure, leading to the formation of vapor bubbles that can damage the pump over time. This issue is particularly critical in applications involving high-speed or high-pressure systems, where the pump may not perform optimally. The wear and tear associated with the movement of gears within the pump can also lead to a decline in performance, making it essential to replace parts or the entire unit to maintain functionality. Hydraulic gear pumps tend to produce noise and vibrations during operation, which can lead to an uncomfortable work environment, particularly in industries such as mining, construction, and manufacturing.



These technological limitations, coupled with the need for regular maintenance and the inability to provide variable flow options without complex modifications, hinder the ability of hydraulic gear pumps to meet the increasingly demanding requirements of modern industrial applications. Consequently, while hydraulic gear pumps are widely used, their performance constraints present a challenge for manufacturers seeking to deliver more versatile and energy-efficient solutions in an increasingly competitive market.

## Environmental Regulations and Sustainability Challenges

As the global focus on environmental sustainability and regulatory compliance intensifies, the Hydraulic Gear Pump Market faces increased pressure to meet stricter environmental standards. Hydraulic gear pumps are typically powered by hydraulic fluids, which can pose environmental risks if not handled properly. In the event of leaks or spills, these fluids can contaminate soil, water, and surrounding ecosystems, raising significant environmental concerns. As industries worldwide face increasing scrutiny from regulatory bodies to minimize their environmental footprint, the hydraulic equipment market must adapt to more stringent environmental regulations. Governments in many countries have implemented policies that require businesses to adopt eco-friendly practices, such as using biodegradable hydraulic fluids, reducing energy consumption, and minimizing pollution. This has led to an increased demand for pumps that are not only energy-efficient but also capable of operating with low-emission fluids, presenting a challenge for hydraulic gear pump manufacturers to innovate within these boundaries. The challenge is compounded by the fact that hydraulic gear pumps, due to their constant operation in high-pressure environments, tend to have higher energy consumption compared to other types of pumps, making it difficult for companies to meet energy-saving targets set by regulatory authorities. Hydraulic gear pumps can be challenging to recycle at the end of their operational life, contributing to waste management issues. To address these challenges, manufacturers are under pressure to develop pumps that are more environmentally friendly, energy-efficient, and capable of using sustainable materials. While the market is evolving to meet these demands, the development and adoption of greener hydraulic gear pumps require substantial investment in research and development, which can be costly. Therefore, while the hydraulic gear pump market is growing, it must confront environmental and sustainability challenges that necessitate technological innovation and adherence to increasingly complex regulatory frameworks, which can be burdensome for manufacturers, especially smaller players in the market.

## Key Market Trends

## Shift Towards Energy-Efficient Hydraulic Gear Pumps

A significant trend in the Hydraulic Gear Pump Market is the increasing demand for energy-efficient solutions. As industries face rising energy costs and greater environmental scrutiny, there is a clear push towards hydraulic gear pumps that offer better energy performance while maintaining the necessary power and efficiency for demanding applications. Energy-efficient pumps are designed to reduce energy consumption by optimizing flow and pressure, helping businesses cut operational costs and comply with sustainability initiatives. Manufacturers are responding to this demand by incorporating advanced materials, enhanced sealing technologies, and improved designs that minimize energy loss during pump operation. The integration of variable speed drives and digital control systems in hydraulic gear pumps allows for more precise regulation of fluid flow, adapting to changing operational conditions. This adaptability ensures that pumps operate at their optimal efficiency, reducing overall energy consumption. The trend is particularly prominent in industries such as construction, automotive, and agriculture, where hydraulic systems power heavy machinery that demands high energy input. As regulations become stricter and energy efficiency becomes a key competitive differentiator, the hydraulic gear pump market is witnessing a shift towards developing pumps that combine energy efficiency with enhanced performance. This trend is expected to drive growth in the market as businesses prioritize sustainability and cost-effectiveness in their operations.

## Integration of Digitalization and Smart Technologies

The integration of digital technologies and smart systems into hydraulic gear pumps is another key trend shaping the market. The rise of Industry 4.0 has led to the growing adoption of smart technologies in industrial equipment, including hydraulic systems. Hydraulic gear pumps are now being equipped with sensors, data analytics, and monitoring systems that enable real-time performance tracking, predictive maintenance, and condition monitoring. These digital systems provide operators with detailed insights into pump performance, allowing for proactive maintenance and minimizing downtime. The use of Internet of Things (IoT) capabilities in hydraulic gear pumps also enables remote monitoring, making it easier for companies to detect issues before they result in costly repairs or replacements. The use of digital twin technology, where virtual models of hydraulic systems are created, allows for simulation and testing of pumps under various conditions, helping manufacturers optimize design and performance. As industries continue to focus on improving efficiency and reducing operational risks, the demand for smart hydraulic gear pumps is expected to grow. The ability to monitor and control pump performance in real-time not only improves operational efficiency but also

enhances the lifespan of hydraulic systems, driving demand in sectors such as automotive, construction, and agriculture. As these technologies become more affordable and accessible, their integration into hydraulic gear pumps will be a major growth driver in the market.

### Growing Adoption of Renewable Energy Solutions

The growing adoption of renewable energy sources is influencing the Hydraulic Gear Pump Market as industries seek hydraulic systems that support the operation of renewable energy infrastructure. Hydraulic gear pumps are essential components in the generation and distribution of energy, especially in applications such as wind and solar energy systems. In the case of wind turbines, hydraulic gear pumps are used to operate various systems, including pitch control and brake systems, which are critical for the safe and efficient operation of turbines. Similarly, in solar energy applications, hydraulic systems are increasingly being used to support solar trackers, which adjust the positioning of solar panels for optimal sun exposure. As the global shift toward cleaner energy sources continues, there is a rising demand for hydraulic solutions that can help optimize the efficiency and reliability of renewable energy systems. Hydraulic gear pumps are particularly valued in these applications for their reliability, longevity, and ability to perform under high pressure in challenging environmental conditions. As renewable energy infrastructure expands, particularly in regions with abundant natural resources, the demand for hydraulic systems that can operate in extreme conditions such as offshore wind farms or solar power plants in desert climates will increase. The adoption of renewable energy technologies represents a key growth opportunity for the hydraulic gear pump market, as these pumps play a crucial role in supporting the infrastructure needed for sustainable energy production. As the renewable energy sector continues to grow, the demand for specialized hydraulic gear pumps will likely follow suit, driving market expansion.

### Segmental Insights

#### Product Insights

External Gear segment dominated the Hydraulic Gear Pump Market in 2024 and is projected to maintain its leadership throughout the forecast period. External gear pumps are widely favored due to their simplicity, reliability, and cost-effectiveness, making them the preferred choice across a broad range of industries. These pumps feature two interlocking gears that are positioned externally, providing a smooth and continuous flow of hydraulic fluid, making them ideal for applications requiring steady and



consistent pressure. External gear pumps are commonly used in industries such as construction, agriculture, automotive, and manufacturing, where they power machinery and equipment like excavators, harvesters, and forklifts. The demand for external gear pumps is driven by their versatility, as they can efficiently handle various fluid types and work under varying operating pressures. They are known for their relatively low maintenance costs, ease of installation, and ability to deliver high-performance results in both low and medium-pressure applications. The robust design of external gear pumps ensures a long operational life, even in harsh environments, contributing to their continued dominance in the market. Their compact size and relatively low noise output make them a suitable choice for applications in confined spaces and environments where noise reduction is a priority. As industries continue to prioritize reliability, efficiency, and cost-effectiveness, the external gear segment is set to remain the leading choice for hydraulic pumps, driving the sustained growth and dominance of this segment throughout the forecast period.

## Regional Insights

North America dominated the Hydraulic Gear Pump Market in 2024 and is anticipated to maintain its leadership throughout the forecast period. This dominance can be attributed to the region's advanced industrial landscape, strong presence of key sectors such as construction, automotive, manufacturing, and oil and gas, all of which rely heavily on hydraulic systems for their operations. North America's robust infrastructure development and high demand for heavy machinery, including excavators, cranes, and agricultural equipment, significantly drive the need for hydraulic gear pumps. The region's growing focus on technological advancements, energy efficiency, and automation further contributes to the rising demand for high-performance hydraulic gear pumps. The oil and gas industry in North America, particularly in countries like the United States and Canada, is a key driver, as hydraulic gear pumps are critical in various upstream and downstream processes, including drilling, fluid handling, and pressure management. The presence of leading manufacturers and innovators in the hydraulic equipment sector, coupled with ongoing investments in research and development, supports North America's dominance. The region's well-established regulatory framework, which encourages the adoption of advanced and energy-efficient solutions, is also helping fuel the demand for hydraulic gear pumps. As industries continue to expand and modernize in North America, the need for hydraulic gear pumps is projected to grow, ensuring that the region retains its leading position in the global market during the forecast period.

## Key Market Players

Parker Hannifin Corporation

Eaton Corporation plc

Shimadzu Corporation

Danfoss A/S

HYDAC International GmbH

Sun Hydraulics, LLC

Illinois Tool Works Inc.

Kawasaki Heavy Industries, Ltd.

#### Report Scope:

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

#### Hydraulic Gear Pump Market, By Product:

External Gear

Internal Gear

#### Hydraulic Gear Pump Market, By End-Use:

Construction

Mining & Metallurgy

Automotive

Transportation

Architecture

Chemicals & Petrochemicals

Others

Hydraulic Gear Pump Market, By Operating Pressure:

Less than 100 Bar

100–300 Bar

Above 300 Bar

Hydraulic Gear Pump Market, By Region:

North America

United States

Canada

Mexico

Europe

Germany

France

United Kingdom

Italy

Spain

Belgium

Asia Pacific

China

India

Japan

South Korea

Australia

Indonesia

Vietnam

South America

Brazil

Colombia

Argentina

Chile

Middle East & Africa

Saudi Arabia

UAE

South Africa

Turkey

Israel

## Competitive Landscape

**Company Profiles:** Detailed analysis of the major companies present in the Global Hydraulic Gear Pump Market.

**Available Customizations:**

Global Hydraulic Gear 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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## **16. ABOUT US & DISCLAIMER**

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