

Industrial Pumps Market – Global Industry Size, Share, Trends, Opportunity, and Forecast, Segmented By Type (Centrifugal Pumps, Reciprocating Pumps, Rotary Pumps, Others), By Application (Water & Waste Water, Power Generation, Oil & Gas, Chemicals & Petrochemicals, Mining, Others), By Region & Competition, 2021-2031F

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Abstracts

The global industrial pumps market is projected to expand significantly, from USD 70.92 billion in 2025 to USD 95.09 billion by 2031, achieving a compound annual growth rate of 5.01%. This market involves the manufacturing of mechanical devices designed to move fluids and slurries using centrifugal or positive displacement methods, vital for various manufacturing and utility sectors. Key drivers for this growth include the critical demand for modernizing water and wastewater infrastructure and the increasing capacity within the chemical and power generation industries. Evidence of this strong demand is reflected in the VDMA's 2024 report, which indicated incoming orders for large-scale plant engineering reached 25.0 billion Euros, highlighting the continuous need for heavy machinery and pumping systems in energy and processing projects.

Market Driver

A primary catalyst for the industrial pumps market is the expanding water and wastewater treatment infrastructure, driven by aging municipal systems and strict environmental regulations. Governments are investing significantly in upgrading sewage networks and potable water facilities, creating a need for robust centrifugal and positive displacement pumps. For instance, Ofwat reported in July 2024 that water companies in England and Wales plan to spend ?88 billion over the next five years on infrastructure

improvements, directly stimulating demand for diverse pumping systems capable of handling variable flow rates and abrasive sludge, thereby sustaining manufacturing volumes for industrial pump OEMs.

Concurrently, increasing investments in oil and gas exploration and production are a crucial growth engine, motivated by the need for energy security and to compensate for depleting reserves. This involves specialized high-pressure pumps for extraction in upstream operations and resilient units for refining and transportation in midstream and downstream sectors. The International Energy Agency's June 2024 report indicated that global upstream oil and gas investment is expected to rise to USD 570 billion in 2024, driving demand for API-compliant pumps designed to withstand extreme operational conditions. This momentum is further evidenced by Sulzer Ltd's first-half 2024 order intake reaching CHF 2,078.8 million, underscoring strong demand for flow control equipment across energy and infrastructure verticals.

Market Challenge

A significant hurdle for the global industrial pumps market expansion is the substantial operational expenditure associated with energy consumption, as industrial pumps are typically energy-intensive and represent a large portion of a facility's utility costs. Although regulatory bodies impose strict efficiency standards, meeting these requirements often incurs significant financial strain for operators due to the prohibitive initial capital costs of replacing older systems with compliant, energy-efficient models. This leads many industrial facilities to postpone necessary retrofitting, preferring to operate outdated equipment rather than face the immediate financial impact of modernization.

Such hesitation in investing in costly upgrades directly limits manufacturing output and decelerates market growth. This is further reflected in data from the VDMA, which reported a 5 percent decline in real machinery production in 2025, illustrating the severe challenges manufacturers face from escalating costs and economic instability, ultimately curbing demand for new pumping technologies.

Market Trends

The market is undergoing a fundamental transformation driven by the adoption of IIoT-enabled smart pumping systems, which allow operators to reduce lifecycle costs via real-time monitoring and data analytics. These advanced units incorporate sensors to monitor critical performance indicators like vibration, temperature, and pressure,

facilitating predictive maintenance that prevents costly failures. This digital transformation is especially vital in sectors like water management and industrial processing, where unexpected downtime results in substantial financial losses. The growing demand for such integrated solutions is visibly boosting the financial performance of leading manufacturers, making digital integration a key revenue stream. For instance, Xylem Inc. reported a 16 percent revenue increase to USD 8.6 billion in its full-year 2024 results, largely attributed to accelerated digital and automation strategies across its global operations.

Simultaneously, the increasing use of additive manufacturing for spare parts is reshaping supply chains by enabling on-demand production of intricate components. Industrial sites are increasingly utilizing 3D printing to circumvent lengthy lead times often associated with traditional methods like casting and forging, particularly for obsolete or rare legacy parts. This technology permits the swift creation of impellers and volutes with optimized designs, enhancing hydraulic efficiency while significantly cutting inventory costs. The operational benefits of this manufacturing shift are particularly evident in critical operations where quick component turnaround is essential for maintaining continuous plant functionality. For example, Sulzer Ltd's 2024 Annual Report highlighted that advanced additive manufacturing reduced component production time by 75 percent for a nuclear facility project, simultaneously extending the service life of the critical equipment.

Key Market Players

Grundfos Holding A/S

Ingersoll-Rand

Flowserve Corporation

Sulzer Ltd.

ITT, INC.

Schlumberger Limited

EBARA International Corporation

The Weir Group PLC

Report Scope

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

Industrial Pumps Market, By Type

Centrifugal Pumps

Reciprocating Pumps

Rotary Pumps

Others

Industrial Pumps Market, By Application

Water & Waste Water

Power Generation

Oil & Gas

Chemicals & Petrochemicals

Mining

Others

Industrial Pumps 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 Industrial Pumps Market.

Available Customizations:

Global Industrial Pumps 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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