

# **Vertical Immersion Pumps Market - Global Industry Size, Share, Trends, Opportunity, and Forecast, Segmented By Type (Cantilever Pumps and Line Shaft Pumps), By Capacity (Up to 100 m<sup>3</sup>/hr, 100 to 500 m<sup>3</sup>/hr, 500 to 1000 m<sup>3</sup>/hr, and Above 1000 m<sup>3</sup>/hr), By Applications (Portable Water Supply, Irrigation, Dewatering, Water Cooling, Geothermal Well, Oils, Fuels, & Lubricants Transfer, and Others), By Region, By Competition, 2018-2028**

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## **Abstracts**

Global Vertical Immersion Pumps Market was valued at USD 4.08 billion in 2022 and is anticipated to project robust growth in the forecast period with a CAGR of 5.19% through 2028.

The vertical immersion pumps market refers to the global industry involved in the manufacturing, distribution, and utilization of vertical immersion pumps—a specialized category of industrial pumps designed for applications where the pump motor is immersed in the fluid being handled. These pumps are widely employed across diverse sectors, including water and wastewater treatment, oil and gas, chemical processing, and power generation. The primary distinguishing feature of vertical immersion pumps is their submerged motor configuration, allowing for efficient fluid transfer in environments with limited space or challenging conditions.

Key characteristics of the vertical immersion pumps market include continuous technological advancements, addressing industry-specific challenges such as corrosion resistance and fluid handling in demanding environments. Government regulations,

economic factors, and technological innovations significantly influence the market dynamics. As industries globally continue to expand, upgrade infrastructure, and focus on sustainable practices, the demand for reliable and efficient vertical immersion pumps is expected to persist, driving growth and evolution within this specialized sector.

## Key Market Drivers

### Increasing Industrialization and Infrastructure Development

The global market for vertical immersion pumps is experiencing robust growth driven by the ongoing wave of industrialization and infrastructure development worldwide. As emerging economies continue to expand their industrial sectors and developed nations invest in upgrading existing infrastructure, the demand for vertical immersion pumps has surged. These pumps play a crucial role in various industrial applications, including water and wastewater treatment, oil and gas, power generation, and chemical processing.

In developing economies, the establishment of new manufacturing plants and industrial facilities has been a key factor propelling the demand for vertical immersion pumps. These pumps are essential for processes such as fluid transfer, cooling, and circulation within industrial settings. Moreover, the increasing focus on wastewater treatment to address environmental concerns further boosts the adoption of vertical immersion pumps, as they are integral to efficient water management in industrial applications.

### Technological Advancements and Product Innovation

The vertical immersion pumps market is being driven by continuous technological advancements and product innovations. Manufacturers are investing in research and development to enhance the efficiency, reliability, and durability of vertical immersion pumps. The integration of smart technologies, such as sensors and automation, has improved pump performance, reduced energy consumption, and minimized downtime.

Innovation in materials and design has also played a pivotal role in the growth of the vertical immersion pump market. The development of corrosion-resistant materials has extended the lifespan of pumps, making them suitable for a wider range of applications, including corrosive environments in chemical processing plants. Additionally, the introduction of modular designs and customizable features allows end-users to tailor pumps to their specific operational requirements, contributing to the market's expansion.

## Rising Focus on Energy Efficiency and Sustainability

With a growing emphasis on energy efficiency and sustainability across industries, there is an increasing demand for vertical immersion pumps that can deliver optimal performance while minimizing energy consumption. Manufacturers are incorporating advanced technologies, such as variable frequency drives (VFDs) and high-efficiency motors, to enhance the energy efficiency of vertical immersion pumps.

End-users are becoming more environmentally conscious and are actively seeking energy-efficient solutions to reduce their carbon footprint. As a result, vertical immersion pump manufacturers are aligning their product offerings with these sustainability goals, driving the adoption of energy-efficient pump systems. This trend is particularly prominent in industries such as water and wastewater treatment, where energy consumption is a significant operational cost.

## Growing Water and Wastewater Treatment Activities

The increasing global focus on water conservation and stringent environmental regulations have led to a surge in water and wastewater treatment activities. Vertical immersion pumps are essential components in water treatment processes, facilitating the movement and transfer of water within treatment plants. The growing need for clean water, coupled with investments in upgrading and expanding water treatment infrastructure, is a key driver for the vertical immersion pumps market.

Governments and environmental agencies worldwide are implementing stringent regulations to ensure the proper treatment of wastewater before discharge. This regulatory landscape compels industries to invest in advanced pumping solutions, further fueling the demand for vertical immersion pumps in the water and wastewater treatment sector.

## Expansion of the Oil and Gas Industry

The oil and gas industry is a major consumer of vertical immersion pumps, utilizing them for various applications such as crude oil transfer, refining processes, and offshore drilling operations. The global demand for energy, coupled with the exploration and extraction of unconventional oil and gas reserves, is propelling the expansion of the oil and gas industry, consequently driving the demand for vertical immersion pumps.

In offshore drilling operations, vertical immersion pumps are crucial for handling

corrosive and abrasive fluids. As exploration activities move into more challenging environments, the demand for robust and reliable pumping solutions has increased. The growth of liquefied natural gas (LNG) projects and the need for efficient fluid transfer in refineries contribute to the sustained demand for vertical immersion pumps in the oil and gas sector.

### Increasing Demand from the Chemical Processing Industry

The chemical processing industry is a significant driver of the global vertical immersion pumps market. These pumps play a vital role in the safe and efficient transfer of various chemicals within processing plants. The chemical industry is characterized by diverse applications, including the handling of corrosive and abrasive fluids, which necessitates the use of specialized pumps like vertical immersion pumps.

As the chemical processing industry continues to expand globally, driven by factors such as population growth and increased consumption of chemical products, the demand for reliable pumping solutions remains strong. Manufacturers in the vertical immersion pumps market are responding to the unique challenges posed by the chemical industry, developing pumps with corrosion-resistant materials and advanced sealing technologies to ensure the safe and efficient handling of diverse chemical substances.

In conclusion, the global vertical immersion pumps market is experiencing sustained growth, driven by a combination of factors including industrialization, technological advancements, sustainability initiatives, water and wastewater treatment activities, expansion in the oil and gas sector, and the increasing demand from the chemical processing industry. As these drivers continue to shape the landscape of various industries, the vertical immersion pumps market is poised for further expansion in the coming years.

### Government Policies are Likely to Propel the Market

#### Environmental Regulations and Compliance Standards

Environmental regulations and compliance standards established by governments globally play a pivotal role in shaping the landscape of the vertical immersion pumps market. Governments, recognizing the environmental impact of industrial activities, have implemented stringent regulations to ensure the responsible and sustainable use of resources. These policies encompass emissions standards, waste disposal regulations,

and guidelines for energy efficiency.

For the vertical immersion pumps market, adherence to environmental regulations is crucial. Manufacturers are required to design and produce pumps that meet or exceed specified efficiency standards, contributing to reduced energy consumption and environmental impact. Additionally, regulations governing the materials used in pump construction, especially in applications involving corrosive or hazardous fluids, influence the innovation and development of materials that are both effective and environmentally friendly.

Government policies promoting environmental sustainability are driving investments in research and development within the vertical immersion pumps industry. Manufacturers are incentivized to create products that align with these regulations, fostering a market environment where sustainable and eco-friendly pump solutions are increasingly sought after.

### Trade and Tariff Policies

Trade and tariff policies established by governments significantly impact the global vertical immersion pumps market. These policies influence the import and export of pump components and finished products, affecting the cost structure and competitiveness of manufacturers. Tariffs, import duties, and trade agreements can either facilitate or impede the flow of goods across borders, shaping the market dynamics for vertical immersion pumps.

In regions with favorable trade policies and agreements, manufacturers may experience reduced barriers to entry and lower production costs due to easier access to raw materials. Conversely, protectionist trade measures can lead to increased costs and supply chain disruptions. The stability and predictability of trade policies play a crucial role in the decision-making processes of vertical immersion pump manufacturers, influencing production locations, supply chain strategies, and overall market competitiveness.

Governments that prioritize open and fair trade practices contribute to a more dynamic and competitive global market for vertical immersion pumps, fostering innovation and efficiency among manufacturers.

### Infrastructure Development Initiatives

Government initiatives focused on infrastructure development have a direct impact on the demand for vertical immersion pumps. Infrastructure projects, such as the construction of water treatment plants, power generation facilities, and urban development, often require the installation of pumps for various applications. Government policies that promote and invest in such projects contribute to the growth of the vertical immersion pumps market.

Infrastructure development policies drive the demand for pumps across sectors such as water and wastewater management, energy, and construction. Governments may allocate funds for the modernization of existing infrastructure or the development of new projects, creating opportunities for vertical immersion pump manufacturers to supply reliable and efficient pumping solutions.

Policies supporting infrastructure development not only stimulate the demand for pumps but also contribute to economic growth, creating a positive feedback loop where a flourishing economy further drives infrastructure projects and the need for vertical immersion pumps.

### Energy Efficiency and Conservation Measures

Governments worldwide are increasingly focusing on energy efficiency and conservation to address environmental concerns and reduce reliance on finite energy resources. Policies aimed at promoting energy-efficient technologies have a direct impact on the vertical immersion pumps market, where energy consumption is a significant consideration in pump selection and operation.

Governments may implement energy efficiency standards and labeling requirements for industrial equipment, including vertical immersion pumps. These policies encourage manufacturers to design and produce pumps that meet or exceed specified energy performance levels. Incentives such as tax credits or subsidies for the purchase of energy-efficient equipment further drive the adoption of efficient vertical immersion pumps.

As the global push for sustainable practices intensifies, government policies promoting energy efficiency are becoming integral to the strategic planning of vertical immersion pump manufacturers. These policies not only benefit the environment but also contribute to cost savings for end-users through reduced energy consumption.

### Water Resource Management and Conservation



Water resource management policies established by governments are critical drivers for the vertical immersion pumps market, particularly in applications related to water supply, distribution, and wastewater treatment. Governments are increasingly recognizing the importance of sustainable water management to address issues such as water scarcity, pollution, and climate change.

Policies related to water resource management influence the design and application of vertical immersion pumps in water-related infrastructure projects. For instance, regulations may stipulate the use of energy-efficient pumps in water treatment plants or the implementation of advanced pumping technologies to minimize water wastage. Additionally, policies governing groundwater extraction and irrigation practices impact the demand for pumps in agriculture.

In regions where water scarcity is a pressing issue, governments may incentivize the adoption of vertical immersion pumps for efficient water transfer and distribution. These policies contribute to the development and deployment of pumps that support responsible water usage and conservation efforts.

### Safety and Quality Standards

Government policies pertaining to safety and quality standards play a critical role in shaping the global vertical immersion pumps market. These policies are designed to ensure the reliability, durability, and safety of industrial equipment, including pumps used in various applications. Compliance with these standards is often a prerequisite for market entry and acceptance by end-users.

Governments establish and enforce standards related to pump design, manufacturing processes, and performance criteria. These standards aim to guarantee the protection of workers, the environment, and the integrity of industrial processes. Manufacturers in the vertical immersion pumps market must invest in quality control measures, testing protocols, and certifications to meet the requirements set forth by regulatory bodies.

Government policies promoting safety and quality standards contribute to the overall reliability of vertical immersion pumps, instilling confidence in end-users regarding the performance and safety of these essential industrial components. This regulatory framework enhances the reputation of manufacturers who prioritize adherence to stringent quality and safety guidelines.

## Key Market Challenges

### Economic Uncertainty and Market Volatility

One of the significant challenges facing the global vertical immersion pumps market is the impact of economic uncertainty and market volatility. The economic landscape is subject to various factors such as geopolitical tensions, trade disputes, and global economic downturns that can significantly influence investment decisions, industrial activities, and infrastructure projects.

During periods of economic uncertainty, industries often reassess their capital expenditures, leading to delays or cancellations of projects that involve the installation of vertical immersion pumps. The cyclical nature of certain industries, such as oil and gas or construction, makes them particularly vulnerable to economic downturns, directly affecting the demand for pumping equipment.

Market volatility can also result in fluctuations in raw material prices, impacting the production costs for vertical immersion pump manufacturers. Uncertain economic conditions may lead to hesitancy among end-users to invest in new equipment, affecting the growth prospects of the market.

Navigating these challenges requires a strategic approach by vertical immersion pump manufacturers, including diversification of product offerings, optimizing supply chain management, and establishing contingency plans to mitigate the impact of economic uncertainties. Additionally, collaboration with industry stakeholders and a proactive response to changing market conditions are essential to sustaining growth in the face of economic challenges.

### Rapid Technological Advancements and Obsolescence

While technological advancements are a driver for the vertical immersion pumps market, they also present a significant challenge, particularly in terms of the rapid pace of innovation and the potential for equipment obsolescence. The pump industry is experiencing a continuous evolution of technologies, including the integration of smart sensors, automation, and Industry 4.0 principles.

The rapid pace of technological change poses challenges for both manufacturers and end-users. For manufacturers, staying at the forefront of innovation requires substantial investments in research and development, as well as the ability to adapt production



processes to incorporate the latest technologies. Failure to keep up with technological advancements may lead to a loss of competitiveness and market share.

On the end-user side, the challenge lies in managing existing equipment and ensuring compatibility with newer technologies. Older pumps may become obsolete or less efficient compared to newer, technologically advanced models. This can result in the need for costly upgrades or replacements to maintain operational efficiency and comply with evolving industry standards.

Moreover, the integration of digital technologies into pump systems introduces cybersecurity concerns. As pumps become more connected, there is an increased risk of cyber threats that could compromise the operation and safety of vertical immersion pumps. Addressing these challenges requires a balance between embracing innovation, managing the lifecycle of existing equipment, and implementing robust cybersecurity measures to ensure the reliability and security of vertical immersion pump systems. Manufacturers and end-users alike must adopt a proactive approach to stay technologically competitive while mitigating the risks associated with rapid advancements in the industry.

## Segmental Insights

### Type Insights

The Cantilever Pumps segment held the largest Market share in 2022. Cantilever pumps are designed with a single support beam, eliminating the need for a submerged shaft. This design reduces the risk of shaft leakage, making Cantilever Pumps suitable for applications where fluid containment is critical. The simplicity of the design can also contribute to easier maintenance and installation.

Cantilever pumps are often preferred in industries where the pumped fluid is abrasive or corrosive. The design eliminates the need for a shaft seal, reducing the risk of wear and tear caused by abrasive particles. This makes Cantilever Pumps a reliable choice in applications such as mining, chemical processing, and wastewater treatment.

The absence of a submerged shaft and the associated seals can lead to reduced maintenance costs over the pump's lifecycle. Cantilever Pumps may require less frequent maintenance compared to Line Shaft Pumps, making them an attractive option for industries seeking cost-effective solutions.

Cantilever Pumps are versatile and can be used in various applications, including those with high concentrations of solids or corrosive fluids. Their design allows for customization to meet specific operational requirements, contributing to their popularity across different industries.

## Application Insights

The Portable Water Supply segment held the largest Market share in 2022. Portable water supply is a fundamental and essential application for vertical immersion pumps. These pumps are commonly used in municipal water supply systems to lift water from underground sources such as wells. They play a crucial role in ensuring a reliable and continuous supply of clean and potable water to communities.

Vertical immersion pumps are extensively used in municipal water treatment and distribution systems. These pumps are employed for lifting water from wells, transferring water between treatment stages, and ensuring adequate water pressure in distribution networks. The reliability and efficiency of vertical immersion pumps contribute to their widespread use in municipal water management.

Vertical immersion pumps are versatile and can be adapted for various applications within the portable water supply sector. Whether it's lifting water from deep wells or transferring water within treatment plants, these pumps are designed to meet the specific demands of portable water supply systems.

Global trends of urbanization and population growth have led to increased demands on water supply infrastructure. Vertical immersion pumps are well-suited for supplying water in both urban and rural settings, and their adaptability to various well depths makes them a preferred choice in regions facing growing water demands.

The reliability and efficiency of vertical immersion pumps contribute to their dominance in applications such as portable water supply. Municipalities and water utilities prioritize equipment that can operate efficiently with minimal downtime to ensure a continuous and reliable water supply to residents.

## Regional Insights

### North America

The North American vertical immersion pumps market is expected to grow at a high

CAGR during the upcoming years. The market is driven by the growing demand for efficient and reliable pumping solutions in the oil and gas, chemical processing, and water and wastewater treatment industries. The increasing need for water and wastewater treatment solutions due to the growing population and concerns about water scarcity is also expected to drive market growth.

## Europe

The European vertical immersion pumps market is expected to grow at the second-largest CAGR during the forecast period. The market is driven by the growing adoption of vertical immersion pumps in irrigation and portable water supply applications. The increasing need for water and wastewater treatment solutions due to the growing population and concerns about water scarcity is also expected to drive market growth.

## Asia Pacific

The Asia Pacific vertical immersion pumps market is expected to be the fastest growing market in the world. The market is driven by the strong growth in the construction, agriculture, and power generation industries in the region. The increasing need for water and wastewater treatment solutions due to the growing population and concerns about water scarcity is also expected to drive market growth.

## Key Market Players

Xylem Inc.

KSB SE & Co. KGaA

Grundfos Holding A/S

Sulzer AG

EBARA Corporation

ITT Corporation

Flowserve Corporation

Wilo SE

Weir Group PLC

Verder Liquids BV

Report Scope:

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

Vertical Immersion Pumps Market, By Type:

Cantilever Pumps

Line Shaft Pumps

Vertical Immersion Pumps Market, By Capacity:

Up to 100 m<sup>3</sup>/hr

100 to 500 m<sup>3</sup>/hr

500 to 1000 m<sup>3</sup>/hr

Above 1000 m<sup>3</sup>/hr

Vertical Immersion Pumps Market, By Application:

Portable Water Supply

Irrigation

Dewatering

Water Cooling

Geothermal Well

Oils, Fuels, & Lubricants Transfer

Others

Vertical Immersion 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

Kuwait

Turkey

## Competitive Landscape

**Company Profiles:** Detailed analysis of the major companies present in the Global Vertical Immersion Pumps Market.

## Available Customizations:

Global Vertical Immersion Pumps Market report with the given Market data, Tech Sci 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).



## Contents

### 1. PRODUCT OVERVIEW

- 1.1. Market Definition
- 1.2. Scope of the Market
  - 1.2.1. Markets Covered
  - 1.2.2. Years Considered for Study
- 1.3. Key Market Segmentations

### 2. RESEARCH METHODOLOGY

- 2.1. Objective of the Study
- 2.2. Baseline Methodology
- 2.3. Formulation of the Scope
- 2.4. Assumptions and Limitations
- 2.5. Sources of Research
  - 2.5.1. Secondary Research
  - 2.5.2. Primary Research
- 2.6. Approach for the Market Study
  - 2.6.1. The Bottom-Up Approach
  - 2.6.2. The Top-Down Approach
- 2.7. Methodology Followed for Calculation of Market Size & Market Shares
- 2.8. Forecasting Methodology
  - 2.8.1. Data Triangulation & Validation

### 3. EXECUTIVE SUMMARY

### 4. VOICE OF CUSTOMER

### 5. GLOBAL VERTICAL IMMERSION PUMPS MARKET OUTLOOK

- 5.1. Market Size & Forecast
  - 5.1.1. By Value
- 5.2. Market Share & Forecast
  - 5.2.1. By Type (Cantilever Pumps and Line Shaft Pumps),
  - 5.2.2. By Capacity (Up to 100 m<sup>3</sup>/hr, 100 to 500 m<sup>3</sup>/hr, 500 to 1000 m<sup>3</sup>/hr, and Above

1000 m<sup>3</sup>/hr),

5.2.3. By Applications (Portable Water Supply, Irrigation, Dewatering, Water Cooling, Geothermal Well, Oils, Fuels & Lubricants Transfer, and Others)

5.2.4. By Region

5.2.5. By Company (2022)

5.3. Market Map

## **6. NORTH AMERICA VERTICAL IMMERSION PUMPS MARKET OUTLOOK**

6.1. Market Size & Forecast

6.1.1. By Value

6.2. Market Share & Forecast

6.2.1. By Type

6.2.2. By Capacity

6.2.3. By Application

6.2.4. By Country

6.3. North America: Country Analysis

6.3.1. United States Vertical Immersion Pumps Market Outlook

6.3.1.1. Market Size & Forecast

6.3.1.1.1. By Value

6.3.1.2. Market Share & Forecast

6.3.1.2.1. By Type

6.3.1.2.2. By Capacity

6.3.1.2.3. By Application

6.3.2. Canada Vertical Immersion Pumps Market Outlook

6.3.2.1. Market Size & Forecast

6.3.2.1.1. By Value

6.3.2.2. Market Share & Forecast

6.3.2.2.1. By Type

6.3.2.2.2. By Capacity

6.3.2.2.3. By Application

6.3.3. Mexico Vertical Immersion Pumps Market Outlook

6.3.3.1. Market Size & Forecast

6.3.3.1.1. By Value

6.3.3.2. Market Share & Forecast

6.3.3.2.1. By Type

6.3.3.2.2. By Capacity

6.3.3.2.3. By Application

## **7. EUROPE VERTICAL IMMERSION PUMPS MARKET OUTLOOK**

### **7.1. Market Size & Forecast**

#### **7.1.1. By Value**

### **7.2. Market Share & Forecast**

#### **7.2.1. By Type**

#### **7.2.2. By Capacity**

#### **7.2.3. By Application**

#### **7.2.4. By Country**

### **7.3. Europe: Country Analysis**

#### **7.3.1. Germany Vertical Immersion Pumps Market Outlook**

##### **7.3.1.1. Market Size & Forecast**

###### **7.3.1.1.1. By Value**

##### **7.3.1.2. Market Share & Forecast**

###### **7.3.1.2.1. By Type**

###### **7.3.1.2.2. By Capacity**

###### **7.3.1.2.3. By Application**

#### **7.3.2. United Kingdom Vertical Immersion Pumps Market Outlook**

##### **7.3.2.1. Market Size & Forecast**

###### **7.3.2.1.1. By Value**

##### **7.3.2.2. Market Share & Forecast**

###### **7.3.2.2.1. By Type**

###### **7.3.2.2.2. By Capacity**

###### **7.3.2.2.3. By Application**

#### **7.3.3. Italy Vertical Immersion Pumps Market Outlook**

##### **7.3.3.1. Market Size & Forecast**

###### **7.3.3.1.1. By Value**

##### **7.3.3.2. Market Share & Forecast**

###### **7.3.3.2.1. By Type**

###### **7.3.3.2.2. By Capacity**

###### **7.3.3.2.3. By Application**

#### **7.3.4. France Vertical Immersion Pumps Market Outlook**

##### **7.3.4.1. Market Size & Forecast**

###### **7.3.4.1.1. By Value**

##### **7.3.4.2. Market Share & Forecast**

###### **7.3.4.2.1. By Type**

###### **7.3.4.2.2. By Capacity**

###### **7.3.4.2.3. By Application**

#### **7.3.5. Spain Vertical Immersion Pumps Market Outlook**

#### 7.3.5.1. Market Size & Forecast

##### 7.3.5.1.1. By Value

#### 7.3.5.2. Market Share & Forecast

##### 7.3.5.2.1. By Type

##### 7.3.5.2.2. By Capacity

##### 7.3.5.2.3. By Application

## **8. ASIA-PACIFIC VERTICAL IMMERSION PUMPS MARKET OUTLOOK**

### 8.1. Market Size & Forecast

#### 8.1.1. By Value

### 8.2. Market Share & Forecast

#### 8.2.1. By Type

#### 8.2.2. By Capacity

#### 8.2.3. By Application

#### 8.2.4. By Country

### 8.3. Asia-Pacific: Country Analysis

#### 8.3.1. China Vertical Immersion Pumps Market Outlook

##### 8.3.1.1. Market Size & Forecast

###### 8.3.1.1.1. By Value

##### 8.3.1.2. Market Share & Forecast

###### 8.3.1.2.1. By Type

###### 8.3.1.2.2. By Capacity

###### 8.3.1.2.3. By Application

#### 8.3.2. India Vertical Immersion Pumps Market Outlook

##### 8.3.2.1. Market Size & Forecast

###### 8.3.2.1.1. By Value

##### 8.3.2.2. Market Share & Forecast

###### 8.3.2.2.1. By Type

###### 8.3.2.2.2. By Capacity

###### 8.3.2.2.3. By Application

#### 8.3.3. Japan Vertical Immersion Pumps Market Outlook

##### 8.3.3.1. Market Size & Forecast

###### 8.3.3.1.1. By Value

##### 8.3.3.2. Market Share & Forecast

###### 8.3.3.2.1. By Type

###### 8.3.3.2.2. By Capacity

###### 8.3.3.2.3. By Application

#### 8.3.4. South Korea Vertical Immersion Pumps Market Outlook

- 8.3.4.1. Market Size & Forecast
  - 8.3.4.1.1. By Value
- 8.3.4.2. Market Share & Forecast
  - 8.3.4.2.1. By Type
  - 8.3.4.2.2. By Capacity
  - 8.3.4.2.3. By Application
- 8.3.5. Australia Vertical Immersion Pumps Market Outlook
  - 8.3.5.1. Market Size & Forecast
    - 8.3.5.1.1. By Value
  - 8.3.5.2. Market Share & Forecast
    - 8.3.5.2.1. By Type
    - 8.3.5.2.2. By Capacity
    - 8.3.5.2.3. By Application

## **9. SOUTH AMERICA VERTICAL IMMERSION PUMPS MARKET OUTLOOK**

- 9.1. Market Size & Forecast
  - 9.1.1. By Value
- 9.2. Market Share & Forecast
  - 9.2.1. By Type
  - 9.2.2. By Capacity
  - 9.2.3. By Application
  - 9.2.4. By Country
- 9.3. South America: Country Analysis
  - 9.3.1. Brazil Vertical Immersion Pumps Market Outlook
    - 9.3.1.1. Market Size & Forecast
      - 9.3.1.1.1. By Value
    - 9.3.1.2. Market Share & Forecast
      - 9.3.1.2.1. By Type
      - 9.3.1.2.2. By Capacity
      - 9.3.1.2.3. By Application
  - 9.3.2. Argentina Vertical Immersion Pumps Market Outlook
    - 9.3.2.1. Market Size & Forecast
      - 9.3.2.1.1. By Value
    - 9.3.2.2. Market Share & Forecast
      - 9.3.2.2.1. By Type
      - 9.3.2.2.2. By Capacity
      - 9.3.2.2.3. By Application
  - 9.3.3. Colombia Vertical Immersion Pumps Market Outlook

#### 9.3.3.1. Market Size & Forecast

##### 9.3.3.1.1. By Value

#### 9.3.3.2. Market Share & Forecast

##### 9.3.3.2.1. By Type

##### 9.3.3.2.2. By Capacity

##### 9.3.3.2.3. By Application

## **10. MIDDLE EAST AND AFRICA VERTICAL IMMERSION PUMPS MARKET OUTLOOK**

### 10.1. Market Size & Forecast

#### 10.1.1. By Value

### 10.2. Market Share & Forecast

#### 10.2.1. By Type

#### 10.2.2. By Capacity

#### 10.2.3. By Application

#### 10.2.4. By Country

### 10.3. Middle East and Africa: Country Analysis

#### 10.3.1. South Africa Vertical Immersion Pumps Market Outlook

##### 10.3.1.1. Market Size & Forecast

###### 10.3.1.1.1. By Value

##### 10.3.1.2. Market Share & Forecast

###### 10.3.1.2.1. By Type

###### 10.3.1.2.2. By Capacity

###### 10.3.1.2.3. By Application

#### 10.3.2. Saudi Arabia Vertical Immersion Pumps Market Outlook

##### 10.3.2.1. Market Size & Forecast

###### 10.3.2.1.1. By Value

##### 10.3.2.2. Market Share & Forecast

###### 10.3.2.2.1. By Type

###### 10.3.2.2.2. By Capacity

###### 10.3.2.2.3. By Application

#### 10.3.3. UAE Vertical Immersion Pumps Market Outlook

##### 10.3.3.1. Market Size & Forecast

###### 10.3.3.1.1. By Value

##### 10.3.3.2. Market Share & Forecast

###### 10.3.3.2.1. By Type

###### 10.3.3.2.2. By Capacity

###### 10.3.3.2.3. By Application



#### 10.3.4. Kuwait Vertical Immersion Pumps Market Outlook

##### 10.3.4.1. Market Size & Forecast

###### 10.3.4.1.1. By Value

##### 10.3.4.2. Market Share & Forecast

###### 10.3.4.2.1. By Type

###### 10.3.4.2.2. By Capacity

###### 10.3.4.2.3. By Application

#### 10.3.5. Turkey Vertical Immersion Pumps Market Outlook

##### 10.3.5.1. Market Size & Forecast

###### 10.3.5.1.1. By Value

##### 10.3.5.2. Market Share & Forecast

###### 10.3.5.2.1. By Type

###### 10.3.5.2.2. By Capacity

###### 10.3.5.2.3. By Application

## 11. MARKET DYNAMICS

### 11.1. Drivers

### 11.2. Challenges

## 12. MARKET TRENDS & DEVELOPMENTS

## 13. COMPANY PROFILES

### 13.1. Xylem Inc.

#### 13.1.1. Business Overview

#### 13.1.2. Key Revenue and Financials

#### 13.1.3. Recent Developments

#### 13.1.4. Key Personnel/Key Contact Person

#### 13.1.5. Key Product/Services Offered

### 13.2. KSB SE & Co. KGaA

#### 13.2.1. Business Overview

#### 13.2.2. Key Revenue and Financials

#### 13.2.3. Recent Developments

#### 13.2.4. Key Personnel/Key Contact Person

#### 13.2.5. Key Product/Services Offered

### 13.3. Grundfos Holding A/S

#### 13.3.1. Business Overview

- 13.3.2. Key Revenue and Financials
- 13.3.3. Recent Developments
- 13.3.4. Key Personnel/Key Contact Person
- 13.3.5. Key Product/Services Offered
- 13.4. Sulzer AG
  - 13.4.1. Business Overview
  - 13.4.2. Key Revenue and Financials
  - 13.4.3. Recent Developments
  - 13.4.4. Key Personnel/Key Contact Person
  - 13.4.5. Key Product/Services Offered
- 13.5. EBARA Corporation
  - 13.5.1. Business Overview
  - 13.5.2. Key Revenue and Financials
  - 13.5.3. Recent Developments
  - 13.5.4. Key Personnel/Key Contact Person
  - 13.5.5. Key Product/Services Offered
- 13.6. ITT Corporation
  - 13.6.1. Business Overview
  - 13.6.2. Key Revenue and Financials
  - 13.6.3. Recent Developments
  - 13.6.4. Key Personnel/Key Contact Person
  - 13.6.5. Key Product/Services Offered
- 13.7. Flowserve Corporation
  - 13.7.1. Business Overview
  - 13.7.2. Key Revenue and Financials
  - 13.7.3. Recent Developments
  - 13.7.4. Key Personnel/Key Contact Person
  - 13.7.5. Key Product/Services Offered
- 13.8. Wilo SE
  - 13.8.1. Business Overview
  - 13.8.2. Key Revenue and Financials
  - 13.8.3. Recent Developments
  - 13.8.4. Key Personnel/Key Contact Person
  - 13.8.5. Key Product/Services Offered
- 13.9. Weir Group PLC
  - 13.9.1. Business Overview
  - 13.9.2. Key Revenue and Financials
  - 13.9.3. Recent Developments
  - 13.9.4. Key Personnel/Key Contact Person

13.9.5. Key Product/Services Offered

13.10. Verder Liquids BV

13.10.1. Business Overview

13.10.2. Key Revenue and Financials

13.10.3. Recent Developments

13.10.4. Key Personnel/Key Contact Person

13.10.5. Key Product/Services Offered

## **14. STRATEGIC RECOMMENDATIONS**

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