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# Pumps: Europe

May 2022



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# About This Report

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## Scope

This report forecasts to 2026 pump demand and production in nominal US dollars at the manufacturer level in Europe. Total demand is segmented by product in terms of:

- centrifugal
- specialty
- positive displacement
- drivers, parts, and accessories

Total demand is also segmented by market as follows:

- process manufacturing
- water infrastructure
- construction
- electricity generation
- oil and gas
- other markets such as healthcare, mining, and shipbuilding

To illustrate historical trends, total demand is provided in annual series from 2011 to 2021; production and the various segments are reported at five-year intervals for 2011, 2016, and 2021.

Excluded from the scope of this report are automotive pumps, concrete pumps, fluid power pumps, heat pumps, and vacuum pumps.

For any given historical year, US dollar amounts are obtained from values expressed in the applicable local currency. These local currency values are converted to US dollars at the average annual exchange rate for that year. For forecast years, the US dollar amounts assume the same annual exchange rate as that prevailing in 2021.

Key macroeconomic indicators are also provided with quantified trends. Other various topics, including profiles of pertinent leading companies, are covered in this report. A full outline of report items by page is available in the Table of Contents.

For the purposes of this report, Europe encompasses the following countries:

**Table 6 | Countries in Western Europe**

Andorra	Germany*	Italy*	Portugal
Austria	Gibraltar	Jersey	Saint Pierre and Miquelon
Belgium	Greece	Liechtenstein	San Marino
Channel Islands	Greenland	Luxembourg	Spain*
Denmark	Guernsey	Malta	Sweden
Faeroe Islands	Iceland	Monaco	Switzerland
Finland	Ireland	Netherlands*	United Kingdom*
France*	Isle of Man	Norway	Vatican City

\*Major pump markets.

Source: The Freedonia Group

**Table 7 | Countries in Eastern Europe**

Albania	Hungary	Romania
Belarus	Latvia	Russia*
Bosnia and Herzegovina	Lithuania	Serbia
Bulgaria	Macedonia	Slovakia
Croatia	Moldova	Slovenia
Czech Republic	Montenegro	Ukraine
Estonia	Poland*	

\*Major pump markets.

Source: The Freedonia Group

## Sources

*Pumps: Europe* (FE70015) is based on *Global Pumps*, a comprehensive industry study published by The Freedonia Group. Reported findings represent the synthesis and analysis of data from various primary, secondary, macroeconomic, and demographic sources, such as:

- firms participating in the industry, and their suppliers and customers
- government/public agencies
- intergovernmental and non-governmental organizations
- trade associations and their publications
- the business and trade press
- indicator forecasts by The Freedonia Group
- the findings of other reports and studies by The Freedonia Group

Specific sources and additional resources are listed in the Resources section of this publication for reference and to facilitate further research.

## Industry Codes

**Table 8 | HS Codes Related to Pumps**

HS Code	Definition
841319	Pumps; for liquids, fitted or designed to be fitted with a measuring device, other than pumps for dispensing fuel or lubricants
841320	Pumps; hand fitted or designed to be fitted with a measuring devices, for liquids, other than those of item no. 8413.11 or 8413.19
841350	Pumps; reciprocating positive displacement pumps, n.e.c. in heading no. 8413, for liquids
841360	Pumps; rotary positive displacement pumps, n.e.c. in heading no. 8413, for liquids
841370	Pumps; centrifugal, n.e.c. in heading no. 8413, for liquids
841381	Pumps and liquid elevators; n.e.c. in heading no. 8413
841382	Liquid elevators
841391	Parts of pumps
841392	Parts of liquid elevators

Source: United Nations Statistics Division

**Table 9 | NACE Codes Related to Pumps**

NACE Code	Definition
28.13	Manufacture of other pumps and compressors

Source: European Commission

## Freedonia Methodology

The Freedonia Group, a subsidiary of MarketResearch.com, has been in business for more than 30 years and in that time has developed a comprehensive approach to data analysis that takes into account the variety of industries covered and the evolving needs of our customers.

Every industry presents different challenges in market sizing and forecasting, and this requires flexibility in methodology and approach. Freedonia methodology integrates a variety of quantitative and qualitative techniques to present the best overall picture of a market's current position as well as its future outlook: When published data are available, we make sure they are correct and representative of reality. We understand that published data often have flaws either in scope or quality, and adjustments are made accordingly. Where no data are available, we use various methodologies to develop market sizing (both top-down and bottom-up) and then triangulate those results to come up with the most accurate data series possible. Regardless of approach, we also talk to industry participants to verify both historical perspective and future growth opportunities.

Methods used in the preparation of Freedonia market research include, but are not limited to, the following activities: comprehensive data mining and evaluation, primary research,

consensus forecasting and analysis, ratio analysis using key indicators, regression analysis, end use growth indices and intensity factors, purchase power parity adjustments for global data, consumer and end user surveys, market share and corporate sales analysis, product lifespan analysis, product or market life cycle analysis, graphical data modeling, long-term historical trend analysis, bottom-up and top-down demand modeling, and comparative market size ranking.

Freedonia quantifies trends in various measures of growth and volatility. Growth (or decline) expressed as an average annual growth rate (AAGR) is the least squares growth rate, which takes into account all available datapoints over a period. The volatility of datapoints around a least squares growth trend over time is expressed via the coefficient of determination, or  $r^2$ . The most stable data series relative to the trend carries an  $r^2$  value of 1.0; the most volatile – 0.0. Growth calculated as a compound annual growth rate (CAGR) employs, by definition, only the first and last datapoints over a period. The CAGR is used to describe forecast growth, defined as the expected trend beginning in the base year and ending in the forecast year. Readers are encouraged to consider historical volatility when assessing particular annual values along the forecast trend, including in the forecast year.

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## Resources

### The Freedonia Group

*Global Pumps*

### Freedonia Industry Studies

*Consumer Water Treatment*

*Global Consumer Water Treatment Products*

*Global Filters*

*Global Industrial Valves*

*Global Plastic Pipe*

*Global Plumbing Products*

*Global Water Treatment Equipment & Chemicals*

*Oilfield Chemicals*

*Pipe Products & Markets*

*Plumbing Fixtures & Fittings*

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*Oil & Natural Gas Pipe: United States*

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*Refined Petroleum Products: United States*

*Renewable Energy: United States*

*Water: United States*

### Freedonia Custom Research

### Trade Publications

*Flow Control*

*Fluid Handling International*

*Industrial WaterWorld*



*Oil & Gas Journal*  
*Processing*  
*Pumps & Systems*  
*World Pumps*

## **Agencies & Associations**

Czech Statistical Office  
Eurostat  
Federal Statistical Office of Germany (Destatis)  
International Monetary Fund  
International Organization for Standardization  
Italy National Institute of Statistics (Istat)  
National Statistics Institute of Spain (INE)  
Organisation for Economic Co-operation and Development  
Russian Federal State Statistics Service  
United Kingdom Office for National Statistics  
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World Bank