



Freedonia Focus Reports
US Collection

Pumps: United States

May 2018



BROCHURE CLICK TO ORDER
FULL REPORT CLICK TO ORDER

www.freedoniafocusreports.com

Table of Contents

| | |
|--|-----------|
| 1. Highlights | 3 |
| 2. Market Environment | 4 |
| Historical Trends | 4 |
| Key Economic Indicators | 6 |
| Technology | 7 |
| NAFTA Outlook | 9 |
| 3. Segmentation & Forecasts | 10 |
| Products | 10 |
| Centrifugal | 12 |
| Positive Displacement | 12 |
| Turbine | 13 |
| Specialty & Other Pumps | 14 |
| Pump Drivers, Parts, & Accessories | 14 |
| Markets | 17 |
| Process Manufacturing | 18 |
| Water Infrastructure | 19 |
| Oil & Gas | 19 |
| Other Markets | 20 |
| 4. Industry Structure | 22 |
| Industry Characteristics | 22 |
| Market Leaders | 23 |
| Baker Hughes | 24 |
| Flowserve | 25 |
| Xylem | 25 |
| 5. About This Report | 26 |
| Scope & Method | 26 |
| Sources | 27 |
| Industry Codes | 27 |
| Resources | 28 |

List of Tables & Figures

| | |
|---|----|
| Figure 1 Key Trends in the US Pump Market, 2017 – 2022 | 3 |
| Figure 2 US Pump Demand Trends, 2007 – 2017 | 4 |
| Table 1 Key Indicators for US Pump Demand, 2007 – 2022 (US\$ bil) | 6 |
| Figure 3 NAFTA Pump Demand by Country, 2017 (%) | 9 |
| Figure 4 US Pump Demand by Product, 2007 – 2022 (US\$ mil) | 10 |
| Table 2 US Pump Demand by Product, 2007 – 2022 (US\$ mil) | 10 |
| Table 3 US Pump Supply & Demand, 2007 – 2022 (US\$ mil) | 11 |
| Figure 5 US Pump Demand by Product, 2007 – 2022 (%) | 16 |
| Figure 6 US Pump Demand by Market, 2007 – 2022 (US\$ mil) | 17 |
| Table 4 US Pump Demand by Market, 2007 – 2022 (US\$ mil) | 17 |
| Figure 7 US Pump Demand by Market, 2007 – 2022 (%) | 21 |
| Table 5 Select Suppliers to the US Pump Market | 24 |
| Table 6 NAICS & SIC Codes Related to Pumps | 27 |

About This Report

Scope & Method

This report forecasts to 2022 US pump demand and shipments in nominal US dollars at the manufacturer level. Total demand is segmented by product in terms of:

- centrifugal
- positive displacement
- turbine
- specialty and other pumps, which includes pumps with designs that are uniquely specialized for specific applications, such as domestic water system pumps, drilling mud pumps, and sump pumps
- pump drivers, parts, and accessories

Total demand is also segmented by market as follows:

- process manufacturing
- water infrastructure
- oil and gas
- other markets such as construction, electric power generation, and healthcare

To illustrate historical trends, total demand is provided in annual series from 2007 to 2017; shipments and the various segments are reported at five-year intervals for 2007, 2012, and 2017.

This report examines the fluid handling pumps industry. Excluded from the scope of this report are automotive pumps, concrete pumps, fluid power pumps, and vacuum pumps.

This report 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.

About This Report

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

Sources

Pumps: United States (FF70015) is based on [Global Pumps Market](#), 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 including:

- firms participating in the industry, and their suppliers and customers
- government/public agencies
- national, regional, and international 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 6 | NAICS & SIC Codes Related to Pumps

| NAICS/SCIAN 2007 | | SIC | |
|---|-----------------------------------|------------------------------------|--------------------------------|
| North American Industry Classification System | | Standard Industrial Classification | |
| 333911 | Pumps and Pumping Equipment Mfg | 3561 | Pumps and Pumping Equipment |
| 333912 | Air and Gas Compressor Mfg | 3563 | Air and Gas Compressors |
| 333913 | Measuring and Dispensing Pump Mfg | 3586 | Measuring and Dispensing Pumps |

Source: US Census Bureau

Copyright & Licensing

The full report is protected by copyright laws of the United States of America and international treaties. The entire contents of the publication are copyrighted by The Freedonia Group.

Resources

The Freedonia Group

Global Pumps Market, May 2018

Freedonia Industry Studies

Global Plastics Processing Machinery, January 2018

Global Water Filtration Equipment Markets, November 2017

Consumer Water Treatment Systems in the US, October 2017

Global Food Processing Machinery, September 2017

Global Water Treatment Chemicals Market, June 2017

Drilling Fluids & Chemicals Market in the US, May 2017

Global Filters Market Forecasts, March 2017

Heat Pump Market in the US, March 2017

Global Air & Fluid Filters Market, January 2017

Freedonia Focus Reports

Air & Fluid Filters: United States

Consumer Water Treatment Systems: United States

Crude Petroleum: United States

Drilling Fluids & Chemicals: United States

Energy: United States

Manufacturing: United States

Natural Gas: United States

Water: United States

Water Disinfection Equipment: United States

Water Treatment Chemicals: United States

Water Treatment Equipment: United States

Freedonia Custom Research

Trade Publications

Flow Control

Fluid Handling International

Industrial WaterWorld

Oil & Gas Journal

Processing

Pumps & Systems

World Pumps

Agencies & Associations

American Water Works Association

About This Report

Hydraulic Institute
International Organization for Standardization
United Nations Comtrade
United States Bureau of Labor Statistics
United States Census Bureau
United States Environmental Protection Agency
United States International Trade Commission