World Pumps

Industry Study with Forecasts to **2010 & 2015**

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Industry Study with Forecasts to ***2010 & 2015***

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Pump market gains in the US, Japan and Western Europe will lag the global average through 2010, yet all three will see improvement in their respective markets over the performance of the 2000-2005 period.

Global demand to advance 4.8% yearly through 2010

World pump demand is projected to rise 4.8 percent per year through 2010 (including price increases) to $37 billion. This represents an improvement over the 2000-2005 period, reflecting accelerating economic growth in much of the developing world. Improving economic fundamentals -- especially fixed investment -- will bolster most pump consuming sectors and strengthen underdeveloped infrastructures in these regions.

Best prospects remain in developing regions

The best prospects for pump suppliers will continue to be found in the developing regions, especially Asia, where India and China are expected to enjoy strong growth. Latin America and the Africa/Mideast region will also register growth above the world average, but will trail gains expected in parts of Asia due to the lagging stage of industrial infrastructures in those regions. Prospects are also favorable in Eastern Europe, where manufacturing output is expected to post solid gains. The outlook is also improving in the advanced nations of North America, Western Europe and the Asia/Pacific region. Although the pump markets in the US, Japan and Western Europe will all register gains that will lag the global average through 2010, all three will also see an improvement in their respective markets over the performance of the 2000-2005 period.

World Pump Demand by Region
($29.2 billion, 2005)

Utilities, aftermarket to post fastest market gains

Among the major markets, utilities are expected to see the fastest growth, benefitting from rising construction expenditures by utilities providers. This is especially true in developing regions, where water and electricity delivery systems are being built. Aftermarket demand will also remain significant in developed regions, as infrastructure in many nations requires replacement due to age. The process manufacturing market is expected to remain the largest user of pump products due to the wide range of applications and significant fluid handling requirements in many of these industries. Growth will benefit from increasing output in most process industries. The resource extraction market is expected to see increases due to rising demand for oil and gas.

Diaphragm pumps to be most rapidly growing type

Centrifugal pumps will continue to be the most commonly used type, due to their varied pressure and load handling capabilities -- including the ability to handle liquids with a high solids content -- and relatively low maintenance costs. Among the major pump types, diaphragm types will post the fastest gains due to rising investment in process manufacturing industries. Turbine pumps will benefit from water pumping and sewage applications.

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Sample Text, Table & Chart

ASIA/PACIFIC

China: Outlook & Suppliers

Pump deman[...] perc
through 2010 to $4[...] the pe
of the 2000-2005 [...] t rate
in the world (amo[...] al ma
following an exter[...] Chin
market, when mea[...] by d
the general econo[...] xpecte
in the country's industrialization process to generate significa
growth in demand for products like pumps.

SAMPLE TEXT

Among other key factors bolstering pump sales in China
the country's booming energy requirements that will promote
energy generating capacity in all forms. China is the world's
producer of coal and has the second most capacity for coal-fir
generation in the world behind the US. Over the next decade, China is expected to account for around half the world's new coal-fired power plants and will surpass the US by around 2007 as the country with the largest coal-based power generation capacity. China is also scheduled to build more nuclear power plants over the next decade than any other country in the world.

Pump production at facilities in China is forecast to rise
percent per year through 2010 to $4.5 billion, outpacing dem
reducing the trade deficit. Gains will benefit from improving
logical expertise, as multinational pump producers invest in t
The nation's trade deficit is expected to become a surplus by
Chinese producers pick up production in response to rising na
regional demand.

Numerous multinational pump producers operate in Chi
for example, maintains several subsidiaries and affiliates in C

TABLE VI-3

CHINA -- PUMP SUPPLY & DEMAND
(million dollars)

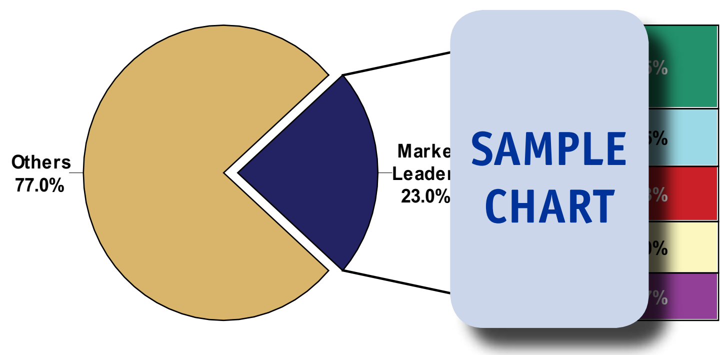
Item	1995	2000	2005	2010	2015
Population (million persons)	1213	1269	1310	1350	1392
$ GDP/capita	2940	4260	6460	9210	12780
Gross Domestic Product (bil 2000$)	3				790
% fixed invest					.3
Gross Fixed Investment (bil 2000$)					45
bpdoe/mil $ GFI					7
Primary Energy Consumption*	1(				00
$ pump/000$ GFI					74
$ pump/bpdoe					11
Pump Demand					50
net exports					00
Pump Shipments	1				50

SAMPLE TABLE

* thousand barrels per day of oil equivalent

CHART VIII-1

WORLD PUMP MARKET SHARE BY COMPANY, 2005
($29.2 billion)



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Sample Profile, Table & Forecast

TABLE VI-4

CHINA -- PUMP DEMAND BY TYPE & MARKET
(million dollars)

Item	1995	2000	2005	2010	2015
Pump Demand	1[illegible]	[illegible]	[illegible]	[illegible]	[illegible]50
By Type:					
Centrifugal	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]90
Rotary	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]46
Reciprocating	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]36
Diaphragm	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]32
Turbine	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]16
Oilfield	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]33
Specialty & Other	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]47
By Market:					
Process Manufacturers	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]60
Utilities	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]60
Others	[illegible]	[illegible]	[illegible]	[illegible]	2330

SAMPLE TABLE

COMPANY PROFILES

Gardner Denver Incorporated
1800 Gardner Expressway
Quincy, IL 62305
217-222-5400
http://www.gardnerdenver.com

Revenue
Geograp ... total) US 41%, Canada
5%, Lat ... 4% and Other Regions 3%
Employ

Key Pro ... ement reciprocating, liquid,
vacuum ... sing cavity, rubber impel-
ler, vacu

SAMPLE PROFILE

Gardner Denver is a leading US designer, manufacturer and marketer of compressed air and petroleum equipment. The Company operates in two segments: Compressor and Vacuum Products, and Fluid Transfer Products.

The Company participates in the global pumps industry through the Fluid Transfer Products segment, which comprises Gardner Denver's operations for the design, production, marketing and servicing of a wide range of pumps, water jetting systems and related aftermarket parts. In 2005, the segment had revenues of $215 million.

Overview of Pump Operations -- Pumps made by Gardner Denver include centrifugal and positive displacement reciprocating types sold under the GARDNER DENVER, GEOQUIP, AJAX and OPI brand names. The Company's portfolio of centrifugal pumps consists of light- to medium-weight models for service in numerous types of

318

"Production of pumps in the Asia/Pacific region will rise 6.9 percent per year through 2010 to $12.2 billion, outpacing the world average. Besides booming markets in many of the developing countries in this region, Western multinational pump producers are also attracted to site production facilities in the region due to the abundant low-cost labor supply and regional export opportunities. However, ..."

--Section VI, pg. 142

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Other Studies

World Water Treatment Products

Global demand for water treatment products will grow 6.4% annually through 2011. Advances will be the fastest in the developing world, especially China and India. Gains in more established markets will be driven by technology upgrades such as higher-end membranes in desalination and other uses. This study analyzes the $29.3 billion world water treatment product industry, with forecasts for 2011 and 2016 by product, market, world region and 20 countries. It also details market share and profiles major players.

#2276 .... 01/2008..................... $5800

HVAC Equipment

US HVAC equipment demand will rise 3.2% annually through 2011, driven mainly by robust growth in nonresidential construction and ongoing strength in residential replacement. Heat pumps are now the largest heating type and will continue to leads gains. Unitary air conditioners will remain the leading type of cooling eqipment. This study analyzes the $14.3 billion US HVAC equipment industry, with forecasts for 2011 and 2016 by fuel, type and market. It also details market share and profiles major players.

#2259 .... 11/2007..................... $4500

Industrial Valves

US industrial valve demand will top $16 billion in 2011, driven by the construction and public utilities markets. Imports will approach 60% of demand. Key export markets include Canada, Mexico, Western Europe, and the Asia/Pacific and Africa/Mideast regions. Steel and alloys will remain the dominant valve material. This study analyzes the $13.9 billion US industrial valve industry, with forecasts for 2011 and 2016 presented by type and market. It also evaluates market share and profiles major manufacturers.

#2205 .... 05/2007..................... $4400

Filters

US filters demand will grow 4.2% yearly through 2011. Gains will be driven by ongoing sales in the dominant aftermarket, pending laws for cleaner air and reduced emissions, as well as increasing penetration of motor vehicle cabin air filters and home air and water filters. Fluid filters will remain the largest segment while air filters will grow the fastest. This study analyzes the $9.8 billion US filter industry to 2011 and 2016 by product and market. It also evaluates market share and profiles leading competitors.

#2164 .... 04/2007..................... $4500

Air Pollution Control in China

Demand for air pollution control equipment in the world's leading emitter of sulfur dioxide and other air pollutants will grow 18% annually through 2010. Particulate removal equipment will remain the largest product category and grow the fastest. Manufacturing and utilities will stay the top markets. This study analyzes the ¥30 billion Chinese air pollution control industry for 2010 and 2015 by product, market and region. The study also evaluates company market share and profiles leading industry players.

#2163 .... 04/2007..................... $4900

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