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World Pumps

Industry Study with Forecasts for **2012 & 2017**

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World Pumps

Industry Study with Forecasts for ***2012 & 2017***

Freedonia

Table of Contents

List of Tables/Charts

(continued on next page)

List of Tables/Charts

(continued from previous page)

WORLD SUPPLY & DEMAND

NORTH AMERICA

WESTERN EUROPE

ASIA/PACIFIC

OTHER REGIONS

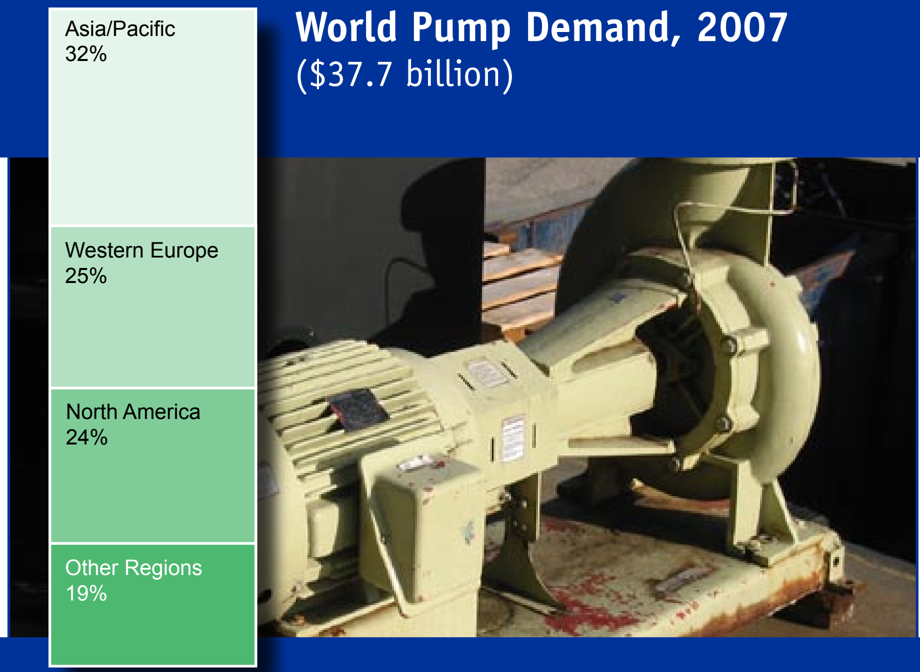
INDUSTRY STRUCTURE

Rising energy consumption and infrastructure development projects in rapidly developing areas such as China and India will provide key growth applications for pumps.

World demand to rise 4.4% yearly through 2012

Global demand for fluid handling pumps is forecast to increase at a 4.4 percent annual rate to $47 billion in 2012. Generally healthy economic conditions will support gains in global pump demand, especially in rapidly developing areas such as China and India, where rising energy consumption and infrastructure development projects will provide key applications for pumps. The advanced nations of North America, Western Europe and the Asia/Pacific region comprise mature markets for pumps. A healthy economic outlook coupled with a pickup in primary energy consumption will support pump demand in the US, while an expanding utilities market for fluid handling pumps will support gains in Japan and Western Europe.

World Pump Demand, 2007
($37.7 billion)



Diaphragm, turbine pumps to see fastest gains

Centrifugal pumps will continue to account for a larger share of the pump market than positive displacement and specialty pumps, due to their varied pressure and load handling capabilities -- including the ability to handle liquids with high solids content -- and relatively low maintenance costs. Among the major positive displacement pump designs, diaphragm pumps will post the most rapid gains due to their low installed cost, simplicity and versatility along with rising investment by utilities and process manufacturing industries. Turbine pumps will also see rapid growth, largely supported by an increase in water pumping and sewage applications, especially in developing areas.

Utilities to offer best market growth prospects

Utilities are projected to see the fastest growth among the major pump markets, supported by increased utility construction, particularly in developing regions, where water and electricity delivery systems are being built. Although the process manufacturing market is not forecast to see as rapid gains, it is still 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. Gains will be spurred by increasing output in most process industries. The resource extraction market is also projected to see increases due to rising oil production.

The largest and most advanced fluid handling pump industries are located in advanced nations, particularly those which have large, well-developed home markets, technical expertise in manufacturing higher-value products and access to factors of production such as capital and labor supplies. China, however, is rapidly becoming a key player in the pump industry, and is now the third largest manufacturer.

World Pumps

Industry Study with Forecasts for ***2012 & 2017***

Sample Text, Table & Chart

TABLE VI-8

INDIA - PUMP DEMAND BY PRODUCT & MARKET
(million dollars)

SAMPLE TABLE

Item	1997	2002	2007	2012	2017
Pump Demand	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
By Product:					
Centrifugal	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
Positive Displacement	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
Rotary	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
Reciprocating	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
Diaphragm	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
Other	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
Turbine	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
Oilfield	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
Specialty & All Other	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
By Market:					
Process Manufacturers	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
Utilities	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
Other	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
% India	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
Asia/Pacific Pump Demand	6740	[illegible]	[illegible]	[illegible]	21700

ASIA/PACIFIC

SAMPLE TEXT

significant amounts of external investment, some of which is
directed at pump-consuming process manufacturing industrie
as at the country's important ... pgrac
country's infrastructure will ... on th
tion side.

Another factor that wil ... will
country's growing energy re ... vth in
tic energy generating capacity ... ple, Ind
world's third largest producer of coal and has the third larges
for coal-fired power generation in the world. Over the next d
is projected to account for approximately 20 percent of the w
coal-fired power plants, which will drive domestic demand fo
plant pumps. In addition, India is also scheduled to build mo
power plants over the next decade than any other country in t
except China. A deceleration in overall economic growth wi
counterbalance, limiting pump market gains to some degree.

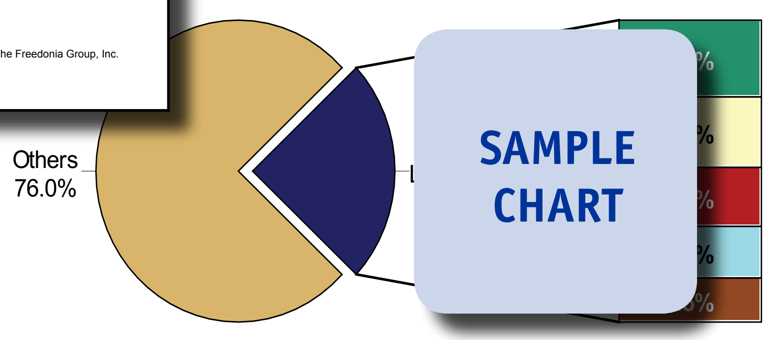
Shipments of fluid handling pumps from factories in India are expected to rise 7.6 percent per year through 2012 to $1.3 billion, about the same rate as demand, but a deceleration from the 2002-2007 pace. As a result, domestic production will not be sufficient to completely meet demand in the country, resulting in a further widening of the country's trade deficit. Supporting pump shipment gains will be healthy domestic market prospects and increased export sales. Intense competition from foreign pump manufacturers, however, will limit production gains.

A few foreign companies have pump manufacturing operations in India, including Ebara, Flowserve, Grundfos and United Technologies. Local producers of fluid handling pumps include Kaushal Industries, Kiwi Pumps and Rotomac.

163

CHART VIII-1

D PUMP MARKET SHARE BY COMPANY, 2007
($37.7 billion)



SAMPLE CHART

World Pumps

Industry Study with Forecasts for ***2012 & 2017***

Sample Profile, Table & Forecast

TABLE VI-7

INDIA - PUMP SUPPLY & DEMAND
(million dollars)

Item	1997	2002	2007	2012	2017
Population (million persons)	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
$ GDP/capita	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
Gross Domestic Product (bil 2006$)	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
% fixed investment	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
Gross Fixed Investment (bil 2006$)	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
Primary Energy Consumption*	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
$ pump/capita	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
$ pump/000$ GFI	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
$ pump/bil btu	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
Pump Demand	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
net exports	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
Pump Shipments	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
% India	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
Asia/Pacific Pump Shipments	[illegible]	[illegible]	[illegible]	[illegible]	20450

* quadrillion Btu

SAMPLE TABLE

COMPANY PROFILES

Sterling Fluid Systems BV
Professor J.H. Bavincklaan 5
1180 AE Amstelveen
Netherlands
http://www.st
31-206-4051

Annual Sales
Employment:

Key Products

SAMPLE PROFILE

Sterling Fluid Systems, a leading private producer of pumps, engineered systems, filling/dispensing systems and industrial testing systems, is a subsidiary of Thyssen Bornemisza Group (Monaco). The Company operates through four business groups: Liquid Pumps, Vacuum Pumps, Engineered Systems and Service.

The Company is active in the world pumps industry via the Liquid Pumps, Vacuum Pumps and Engineered Systems groups. Through the Liquid Pumps group, Sterling Fluid Systems designs and manufactures a wide range of liquid pumps for chemical process, industrial, power generation, food and beverage, liquefied petroleum gas handling, and sewage applications, among others. Specific types of liquid pumps include SIHIISOCHEM horizontal single-stage volute casing pumps for chemical process applications; SIHISUPERNOVA single- and double-stage volute casing pumps for general-purpose industrial applications; LABOUR self-priming pumps for chemical applications; HALBERG condensate, boiler feed and cooling water pumps for the power generation market; and SHK self-priming hygienic pumps for brewery, dairy, and other food and beverage applications.

374

"Demand for fluid handling pumps in India is expected to expand 7.5 percent per annum through 2012 to $1.35 billion, above the regional average but a deceleration from the 2002-2007 period. Gains will result from ongoing development and economic reforms implemented in the country, attracting ..."

--Section VI, pg. 162

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Other Studies

World Material Handling Products

This study analyzes the world material handling product industry. It presents historical demand data for 1997, 2002 and 2007 and forecasts to 2012 and 2017 by product (e.g., industrial trucks and lifts; conveying equipment; hoists, cranes and monorails; automated storage and retrieval systems; software and services); market (e.g., durable goods manufacturers, nondurable goods manufacturers); world region and major country. The study also considers market environment factors, evaluates market share and profiles industry players.

#2392 .... 08/2008.................... $5700

Sensors

This study analyzes the US sensor industry, presenting historical demand data (1997, 2002, 2007) and forecasts for 2012 and 2017 by type (e.g., pressure, temperature, flow and level, speed, motion, proximity and positioning, electrical property, chemical property, imaging); and market (e.g., motor vehicles, industrial, military/aerospace, consumer electronics, electronic security, medical, information technology). The study also considers market environment factors, reviews technology, details market share and profiles major players.

#2377 .... 07/2008.................... $4600

Water Treatment in China

Demand for water treatment products in China will soar 15.5% annually through 2012. Filters and membranes will be the fastest growing segments, although all types will see double-digit gains. The industrial sector will remain the largest market, but will be outpaced by municipal and other end uses. The study analyzes the ¥20.4 billion water treatment product industry in China, with forecasts for 2012 and 2017 by product, market and region. It also evaluates company market share and profiles leading industry players.

#2329 .... 04/2008.................... $5100

Filters in China

Demand for filters in China will jump 14.4% annually through 2011. Air filters will post the fastest gains, spurred by rising output of products that include filters or are made in clean-air factories. The motor vehicle market will remain dominant while the water and waste treatment segment of the utilities and consumer markets grows the fastest. This study analyzes the ¥20.9 billion Chinese filter industry, with forecasts for 2011 and 2016 by product and market. It also evaluates company market share and profiles major players

#2310 .... 05/2008.................... $5100

World Industrial Valves

Global demand for industrial valves is forecast to increase 4.4% annually through 2011, driven by healthy indicator growth in developing countries and a shift toward more expensive automated valves and actuators in advanced nations. The fastest market gains will occur in China, Indonesia, Thailand, Malaysia and India. This study analyzes the global valve industry, with forecasts for 2011 and 2016 by product, world region and for 34 countries. It also considers details market share and profiles major players.

#2297 .... 03/2008.................... $5500

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