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World Pumps

Industry Study with Forecasts for **2014 & 2019**

Study #2676 | November 2010 | \$6100 | 454 pages



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In most developing countries, pump market growth will decelerate relative to the 2004-2009 period, while industrialized nations will see real sales growth rebound from depressed 2009 levels.

Global demand to rise 6.5% yearly through 2014

World fluid handling pump demand is forecast to rise 6.5 percent annually through 2014 to \$69 billion. In most developing countries, pump market growth in real (inflation-adjusted) terms will decelerate relative to the 2004-2009 period. However, this rate of increase will still exceed the average global pace. Industrialized nations will see pump sales growth rebound in real terms from depressed 2009 levels. Overall advances in the pump market will be restrained by decelerating price hikes, as raw material costs moderate.

Three-fifths of all new fluid handling pump demand through 2014 will be attributable to the Asia/Pacific region. Pump sales in the region are predicted to rise almost nine percent annually because of solid advances in fixed investment expenditures, primary energy consumption and nonbuilding construction spending. Several Asian countries are projected to record impressive gains, including China, India and Malaysia. Central and South America is expected to be the next best performing market, followed closely by the Africa/Mideast region and Eastern Europe.

Although growth in developed parts of the world will not be as strong as in most industrializing areas, it will still be quite healthy. A recovery in fixed investment spending, primary energy consumption and construction activity will promote healthy pump sales in a number of

World Pump Demand, 2009 (\$50.4 billion)



developed nations, including Australia, the Netherlands, Canada, Austria, Japan and Spain. The US pump market is expected to grow slightly faster than the 2004-2009 pace.

Process manufacturing to be fastest growing market

Process manufacturing will be the fastest growing pump market between 2009 and 2014. Gains will be driven by an improved outlook for most process manufacturing industries. In addition, more stringent environmental regulations will help generate demand for more efficient and better performing fluid handling pumps, such as sealless centrifugal models. The utilities market is also

expected to record impressive growth, as spending on water and energy transportation network construction expands rapidly in many industrializing nations.

The growing popularity of application-specific pumps and a favorable waterworks construction outlook will spur demand for pumps classified in the other pumps segment, particularly specialty and turbine pumps. Sales of positive displacement pumps will be bolstered by advances in process manufacturing activity, while the centrifugal pump segment will benefit from rising demand for more versatile, low-maintenance pump models.

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Sample Text, Table & Chart

ASIA/PACIFIC

China: Pump Outlook & Suppliers

The pump market in China is projected to grow at an annual rate of 11.2 percent from 2009 through 2014 to \$19.9 billion, but still the world's fastest growing market. Fixed investment spending will continue to bolster fluid handling pump infrastructure, particularly in the industrial sector. This will also contribute to advanced pump production. Pump production is expected to rise considerably between 2009 and 2014 as new coal-fired and nuclear power plants come online. More competition for foreign investment and construction projects from other industrializing Asia/Pacific nations will limit fluid pump demand in China.

The other pumps segment, led by specialty and turbine pumps, is projected to register the fastest growth during the 2009-2014 period. As manufacturing in China becomes more sophisticated and technology advanced, industrial enterprises will experience a rise in demand for application-specific fluid handling pumps. Increasing water consumption will stimulate water network construction activity and related turbine pump sales. The positive displacement pump segment is also expected to perform well during this time, benefiting from a robust process manufacturing outlook. In terms of pump markets, process manufacturers, utilities and other end users are all forecast to record rapid growth through 2014.

Fluid handling pump shipments from manufacturers in China are projected to rise 11.2 percent per annum to \$19.9 billion in 2014, reflecting advances in product demand. As domestic pump production continues to expand at a remarkable pace, China will become a major exporter of pumps. Output will increase because of domestic

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SAMPLE
TEXT

TABLE VI-3

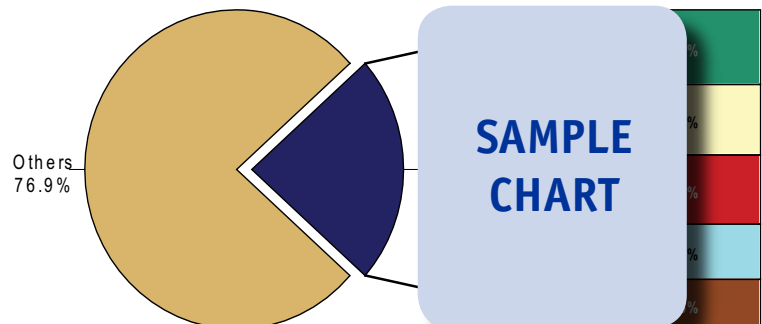
CHINA - PUMP SUPPLY & DEMAND
(million dollars)

Item	1999	2004	2009	2014	2019
Population (million persons)	1.2	1.4	1.5	1.6	1.7
\$ GDP/capita	1,000	2,000	3,000	4,000	5,000
Gross Domestic Product (bil 2008\$)	10,000	20,000	30,000	40,000	50,000
% fixed investment	36	36	36	36	36
Gross Fixed Investment (bil 2008\$)	3,600	7,200	10,800	14,400	18,000
Primary Energy Consumption (quad Btu)	10	15	20	25	30
\$ pump/capita	7	14	21	28	35
\$ pump/000\$ fixed investment	2	2	2	2	2
\$ pump/bil Btu	0.7	0.9	1.1	1.3	1.5
Pump Demand	0	0	0	0	0
net exports	0	0	0	0	0
Pump Shipments	0	0	0	0	0
% China	2	2	2	2	2
Asia/Pacific Pump Shipments	6000	9700	20000	32000	40450

SAMPLE
TABLE

CHART VIII-1

WORLD PUMP MARKET SHARE BY COMPANY
(\$50.4 billion, 2009)



SAMPLE
CHART

Sample Profile, Table & Forecast

TABLE VI-4
CHINA - PUMP DEMAND BY PRODUCT & MARKET
 (million dollars)

Item	1999	2004	2009	2014	2019
Pump Demand	1,000	1,200	1,400	1,600	1,800
By Product:					
Centrifugal	600	700	800	900	1,000
Positive Displacement	200	250	300	350	400
Rotary	100	120	140	160	180
Reciprocating	100	130	160	190	220
Diaphragm	100	120	140	160	180
Other	100	120	140	160	180
Turbine	100	120	140	160	180
Oilfield	100	120	140	160	180
Specialty & All Other	100	120	140	160	180
By Market:					
Process Manufacturers	500	600	700	800	900
Utilities	200	250	300	350	400
Other	300	350	400	450	500
% China	4	4	4	4	4
Asia/Pacific Pump Demand	6,000	7,000	8,000	9,000	10,000



COMPANY PROFILES

Shanghai East Pump Group Company Limited
 5551 Hutai Road
 Shanghai 201907
 China
 86-21-6602-3006
<http://www.eastpump.com>

Annual Sales:
 Employment:

Key Products: process pumps and chemical

Shanghai East Pump Group Company Limited is a leading manufacturer of industrial pumps and other equipment. The company has ten shareholding subsidiaries.

The Company is involved in the world pumps industry through the manufacture and sale of industrial pumps, including centrifugal and chemical process types. Shanghai East Pump makes a wide variety of centrifugal pumps using stainless steel and markets these products via the HL, CHDF, DFCL, XA and other series. Both HL and CHDF series centrifugal pumps are light-duty, horizontal, multi-stage models utilized in potable and industrial water, air conditioning system, industrial cleaning and other applications. The Company's DFCL vertical multi-stage centrifugal pumps are designed for the pharmaceutical, food and beverage, water, and other markets, while XA single-stage, single-suction bracketed centrifugal pumps are engineered for the transportation of clean water and other liquids in municipal water supply, firefighting, irrigation and other applications.

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"Fluid handling pump demand in the Asia/Pacific region is projected to rise 8.6 percent annually through 2014 to \$33.4 billion, exceeding gains in all other regional markets. Advances in GDP, fixed investment expenditures, process manufacturing activity, infrastructure construction spending and primary energy consumption will support growth during the 2009-2014 period. Once again, China and India will be the world's two best performing markets. However, ..."
 --Section VI, pg. 155

OTHER STUDIES

Sensors

Demand for sensors in the US will rise 6.1% annually to 2014. The motor vehicle market will grow the fastest based on a rebound in motor vehicle production and the rising use of newer sensor-laden systems. Proximity and positioning and chemical property sensors will be the fastest growing types. This study analyzes the \$9.7 billion US sensors industry, with forecasts for 2014 and 2019 by product and market. The study also reviews sensor technology, evaluates company market share and profiles industry competitors.

#2662 September 2010..... \$4900

World Filters

Global demand for filters is forecast to expand 5.1% annually through 2013. Market advances in the developing areas will considerably outpace increases in the US, Western Europe and Japan. Sales of air purification filters will be the fastest growing segment while internal combustion engine and related filters remain the largest. This study analyzes the \$45.5 billion world filter industry, with forecasts for 2013 and 2018 by product, market, world region and for 26 countries. It also evaluates market share and profiles industry players.

#2568 November 2009..... \$6100

World Water Treatment Products

Global water treatment product demand will rise 5.7% yearly through 2013. Large developing markets such as China and India will grow the fastest. Gains in developed areas will be based on efforts to increase water reuse, improve the aesthetic quality of drinking water and further reduce water contamination. This study analyzes the \$44.6 billion world water treatment product industry, with forecasts for 2013 and 2018 by product, market, world region and for 23 countries. It also evaluates market share and profiles industry players.

#2563 November 2009..... \$6100

World Water Desalination

Global water desalination demand will grow 9.1% annually through 2013. The Africa/Mideast region will remain the dominant market while the Asia/Pacific region grows the fastest. Technologies such as reverse osmosis membranes and multiple-effect distillation will increase market share. This study analyzes the \$8.4 billion world water desalination industry, with forecasts for 2013 and 2018 by technology, product, service, world region and for 17 countries. It also evaluates market share and profiles industry players.

#2523 August 2009..... \$5700

Industrial Valves

US industrial valve demand will reach \$15.2 billion in 2013, supported in part by ongoing development of better performing, advanced valves. Process manufacturing and utilities will remain dominant markets while construction grows the fastest. Standard valves will outpace automatic types as buyers opt for less costly valves that can be upgraded later. This study analyzes the US industrial valve industry, with forecasts for 2013 and 2018 by product and market. It also evaluates market share and profiles industry players.

#2521 July 2009..... \$4700

About The Freedonia Group

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