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# World Pumps

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Industry Study with Forecasts for **2016 & 2021**

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*In developing areas such as China and India, demand will result from industrialization; in the US, demand will benefit from the boom in hydraulic fracturing in the oil and gas market.*

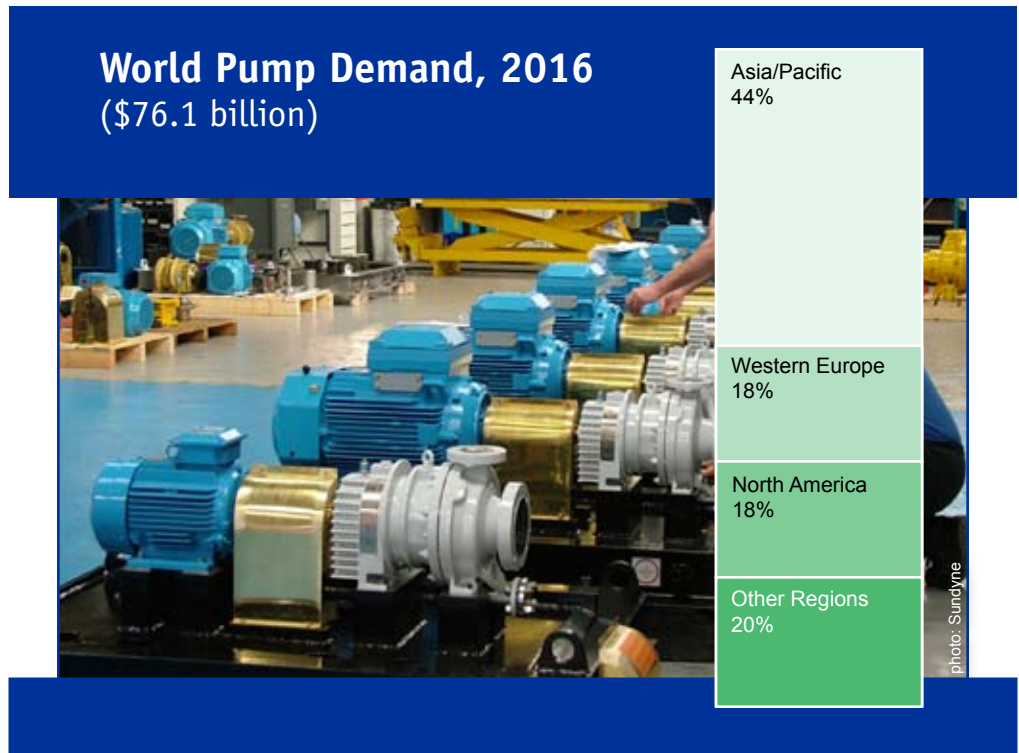
## World demand to rise 6.4% annually through 2016

Global demand for pumps is forecast to rise 6.4 percent per year through 2016 to \$76.1 billion. Although growth will be healthy across the globe, the drivers of growth will vary by region. Advances in developing areas such as China and India will result from industrialization, as investment in water infrastructure and electricity generation grows. In developed areas, continued advances in manufacturing output will provide growth in the process manufacturing market. Oil producing nations such as those in the Mideast will see gains due to rising drilling activity. In the US, demand will benefit from the boom in hydraulic fracturing in the oil and gas market, as well as from the improved economy.

## Process manufacturing market to see strong gains

Process manufacturing will post strong gains in pump demand, driven by growing output, especially in the chemical, pulp and paper, and food and beverage industries. Rising standards of living will boost capacity in process manufacturing in developing regions. In addition, the need for more efficient manufacturing operations in developed nations will spur investment in new equipment, benefiting pumps.

Advances in pump demand in the water infrastructure market will result from two key factors: in developing nations,



access to water supply and sanitation will be increased; in developed nations, aging water infrastructure will need repair and upgrade. For example, many current water systems across the world have pipelines that are over 50 years old. These trends will increase demand for water infrastructure equipment such as pumps.

Pump demand in the oil and gas market will benefit from increased drilling activity and oil production. High oil prices have spurred drilling, a trend that is expected to continue. The use of hydraulic fracturing in oil and gas extraction, particularly in the US, will benefit pump demand. The development of shale plays in nontraditional energy producing areas

(such as the Bakken Shale in the US) will create the need for new oil pipeline construction to connect these fields with existing energy infrastructure.

## Positive displacement, centrifugal pumps among notable opportunities

Among product types, growth in process manufacturing activity will boost gains for positive displacement pumps. The centrifugal pump segment will benefit from growing demand for more versatile, low-maintenance pump models. The development of improved pump designs and the use of new materials will spark pump demand across product types.

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## Sample Text, Table & Chart

### ASIA/PACIFIC

#### China: Pump Outlook & Suppliers

Demand for fluid handling pumps in China is projected to reach 1.5 billion, a moderate increase from 1.2 billion in 2011. The fastest rates of growth will be fueled by strong economic activity. Advances in water infrastructure and

Process manufacturing will remain the largest pump market during the forecast period. Growth will result from rising production in end use industries such as chemicals, pulp and paper, and metals. For example, China will have the second strongest growth (behind India) in paper and paperboard production through 2016, boosting pump demand as a matter of course. By 2021, China will account for the majority of global steel production, a byproduct of its rising durable goods

The water infrastructure segment will be boosted by continued urbanization of the population and concerted efforts to expand access to public water supplies, in both urban and rural areas. Moreover, the government has committed to an effort to improve the nation's water infrastructure, increasing access to safe water, especially outside large metropolitan areas, and improving both the rate and quality of wastewater treatment. In its latest (2011) Five-Year Plan, China's government has targeted the water sector as an area of major concern. For example, ongoing construction of the South-to-North Water Diversion Project will spur infrastructure equipment gains.

China's oil production is expected to register only moderate growth through 2016, dampening demand for pumps. Drilling activity is expected to slow through 2016, adversely impacting demand for pumps as a matter of course. However, opportunities will exist

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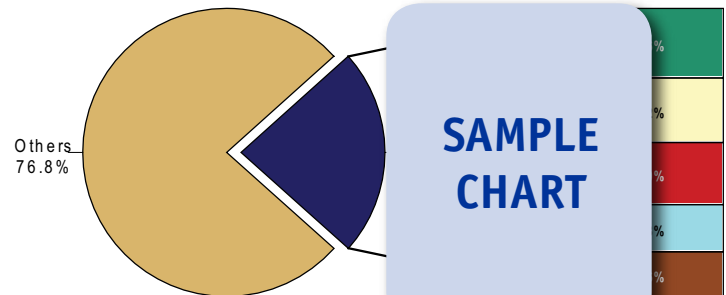
TABLE VI-3

CHINA: PUMP SUPPLY & DEMAND  
(million dollars)

Item	2001	2006	2011	2016	2021
Population (million persons)	1,210	1,320	1,380	1,420	1,480
\$ GDP/capita	1,000	2,000	3,000	4,000	5,000
Gross Domestic Product (bil 2010\$)	10,000	20,000	30,000	40,000	50,000
% fixed investment	35	35	35	35	35
Gross Fixed Investment (bil 2010\$)	3,500	7,000	10,500	14,000	17,500
Primary Energy Consumption (quad Btu)	100	150	200	250	300
Crude Oil Production (million barrels)	5	10	15	20	25
\$ pump/capita	4	4	4	4	4
\$ pump/000\$ fixed investment	3	3	3	3	3
\$ pump/bil Btu energy	3	3	3	3	3
Pump Demand	0	0	0	0	0
net exports	0	0	0	0	0
Pump Shipments	0	0	0	0	0
% China	0	0	0	0	0
Asia/Pacific Pump Shipments	70	70	70	70	80

CHART VIII-1

WORLD PUMP MARKET SHARE  
(\$55.8 billion, 2011)



## Sample Profile, Table & Forecast

**TABLE VI-4**  
**CHINA: PUMP DEMAND BY TYPE & MARKET**  
 (million dollars)

Item	2001	2006	2011	2016	2021
Pump Demand	21	27	30	30	30
By Type:					
Centrifugal	15	15	15	15	15
Positive Displacement	5	5	5	5	5
Rotary	5	5	5	5	5
Reciprocating	0	0	0	0	0
Diaphragm	0	0	0	0	0
Other	1	1	1	1	1
Oilfield	0	0	0	0	0
Turbine	0	0	0	0	0
Specialty & All Other	1	1	1	1	1
Drivers, Parts, & Accessories	0	0	0	0	0
By Market:					
Process Manufacturers	1	1	1	1	1
Water Infrastructure	0	0	0	0	0
Oil & Gas	0	0	0	0	0
Other	0	0	0	0	0
% China	8	8	8	8	8
Asia/Pacific Pump Demand	8	8	8	8	8

SAMPLE  
PROFILE

SAMPLE  
TABLE

### COMPANY PROFILES

#### Shanghai East Pump Group Company Limited

5551 Hutai Road  
 Shanghai 201907  
 China  
 86-21-6602-3111  
<http://www.eastpump.com>

Annual Sales:  
 Employment:

Key Products:

Shanghai East Pump Group is a manufacturer of industrial pumps and other equipment. The state-owned company maintains ten shareholding subsidiaries.

The Company is involved in the world pumps industry through the manufacture and sale of industrial pumps. Among pumps from Shanghai East Pump are centrifugal pumps, including single stage, multistage, submersible, and other types. These pumps are suitable for water supply, agricultural, boiler feed, fire water, water boosting and circulating, industrial drainage, power generation, and other applications. The Company makes single stage, single-suction centrifugal pumps through the DFG, DFW, and XA series for water transport end uses; and the WFB series for the power station, metallurgy, pharmaceutical, mining, and other markets. Multistage pumps from Shanghai East Pump encompass CHL, CHDF, D, and DG horizontal models; and DFCL, DFL, LG-B, and DL vertical types. The Company's submersible pumps include DFZQ vertical and DFHQ horizontal axial/mixed flow pumps for municipal works, water supply, industrial drainage, water treatment, agricultural irrigation, and other end uses.

"Shipments of pumps from facilities in China are expected to expand 9.7 percent yearly through 2016 to \$19.1 billion. As a result, China will continue to be the largest producer of pumps for the foreseeable future. Healthy pump demand locally and throughout the world will contribute to future production growth. Additional investment from multinational pump producers will also spur gains as well as help advance local technological expertise in pump production. As a result, China is projected to eventually become an exporter of higher end pumps as well."  
 --Section VI, pg. 174-5





**OTHER STUDIES**

**World Water Treatment Equipment**

World demand for water treatment equipment is expected to grow 6.9 percent per year to \$53.4 billion in 2017. Developing areas will show strong growth based on improved access to treated drinking water and sanitation facilities, particularly through greater use of filtration and membrane systems. This study analyzes the \$38.3 billion world water treatment equipment industry, with forecasts for 2017 and 2022 by product, market, world region and major country. The study also evaluates company market share and profiles industry players.

#3103 .....December 2013 ..... \$6100

**World Industrial Valves**

Global demand for industrial valves will rise 5.1 percent per year through 2017 to \$82.5 billion. The Asia/Pacific and Africa/Mideast regions, along with Central and South America, will grow the fastest. The oil and gas industry and process manufacturers will be the fastest growing markets. Automatic valves will outpace conventional. This study analyzes the \$64.2 billion world industrial valve industry, with forecasts for 2017 and 2022 by product, market, world region, and for 36 countries. The study also evaluates company market share and profiles industry competitors.

#3085 .....January 2014 ..... \$6100

**Water Treatment Equipment**

Demand for water treatment equipment in the US is forecast to grow 5.9 percent per year to \$13.0 billion in 2017. The resource extraction market will post the most rapid gains, followed by the recovering commercial and residential markets. Disinfection and membrane equipment will be the fastest growing product segments. This study analyzes the \$9.8 billion US market for water treatment equipment, with forecasts for 2017 and 2022 by product, market, and application. The study also evaluates company market share and profiles industry players.

#3052 .....July 2013 ..... \$5100

**Oil & Gas Infrastructure**

US demand for oil and gas infrastructure equipment will rise 6.3 percent yearly through 2016 to \$12.1 billion. The key pipe segment will benefit from construction of new transmission lines and the need for gathering systems at new drilling sites. Compressors will be the fastest growing type, while the Eastern US leads gains by region. This study analyzes the \$8.9 billion US oil and gas infrastructure equipment industry, with forecasts for 2016 and 2021 by product, application and US region. The study also evaluates company market share and profiles industry players.

#2922 .....November 2012 ..... \$5100

**World Oilfield Equipment**

Global demand for oilfield equipment will rise 3.8 percent yearly through 2016 to \$109 billion. Growth will be strongest in developing areas, where better infrastructure will benefit drilling activity. New, more expensive techniques to drill for unconventional reserves such as shale oil and oil sands will boost spending on oilfield equipment. This study analyzes the \$90.6 billion world oilfield equipment industry, with forecasts for 2016 and 2021 by product, world region and for 23 major countries. The study also evaluates company market share and profiles industry players.

#2937 .....October 2012 ..... \$6100

**About The Freedonia Group**

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