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# World Pumps

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Industry Study with Forecasts for **2018 & 2023**

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Study #3231 | January 2015 | \$6500 | 447 pages

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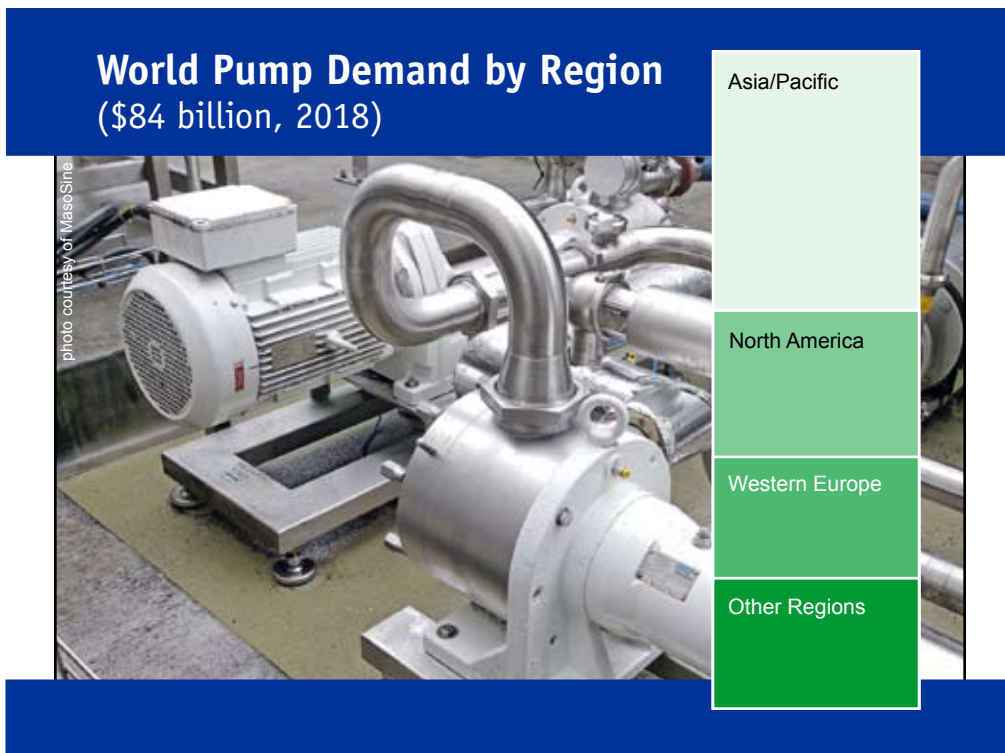
*Gains will be driven in developed nations by an improved fixed investment spending, and by increased investment in water infrastructure and mining activity in developing countries.*

## Global demand to grow 5.5% yearly through 2018

Global demand for fluid handling pumps is projected to increase 5.5 percent per year to \$84 billion in 2018. In developed nations, an improved environment for fixed investment spending will enable pump-using manufacturers to invest in expansion and upgrade of facilities. In developing areas, increased investment in water infrastructure will spur gains as access to water supply and sanitation systems is expanded. Continued growth in mining activity, a byproduct of voracious demand for mined materials in China, India, and other developing nations, will boost pump demand in countries with large mining industries. Growth in oil production will also provide opportunities, especially in newly developed areas requiring infrastructure development.

## China, Asia/Pacific region to lead new pump demand

The Asia/Pacific region will generate 44 percent of new pump demand through 2018. Pump sales in the region will be based on solid advances in fixed investment expenditures and construction spending. Several Asian countries are projected to record impressive gains, including China and India. China alone will account for 23 percent of all new global pump demand between 2013 and 2018. On a regional basis, Central and South America is expected to post the strongest annual gains, benefiting from ongoing industrialization. The US will remain the largest national market through 2018, due to its large process manufac-



turing industries, water infrastructure, and oil and gas industries.

## Higher incomes in developing regions to benefit process manufacturing

Pump demand in the process manufacturing market will benefit from greater standards of living, particularly in developing regions. As consumers earn better incomes, they will spend more on goods such as fuel, chemicals, and food and beverages. 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. Demand in the oil and gas market will benefit from more

oil and gas production worldwide, though this may be tempered in the short term by a sharp decline in oil prices.

## Centrifugal pumps to remain dominant segment

Centrifugal pumps will continue to be the most commonly used pump design due to their varied pressure and load handling capabilities -- including the ability to handle liquids with high solids content -- and relatively low maintenance costs. Demand for positive displacement pumps will outpace the industry average due to growth in process manufacturing activity. Demand for aftermarket parts will benefit from rising manufacturing activity, mainly in harsh environments such as those in the chemical industry.

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## Sample Text, Table & Chart

### OTHER REGIONS

**Brazil: Market Outlook** -- Pump demand in Brazil will grow at a pace above the regional average. Growth in the oil and gas market will result from increased investment in oil and gas infrastructure.

Centrifugal pumps will continue to be the dominant type of the product line. In addition, oilfield pumps will lag the industry average due to modest growth in oil production. The displacement pump segment will outpace the industry average in 2018. Growth in process manufacturing activity will boost demand for all three types of positive displacement pumps. Specialty pumps will benefit from growth in construction expenditures and fuel demand for sump and domestic water pumps. Oilfield pumps will lag the industry average due to modest growth in oil production.

Advances in pump demand from the process manufacturing sector are projected to post rapid gains through the forecast period. Growth in process manufacturing output will create opportunities in the chemical sector, for example, will see much better growth than the overall average. However, slowing growth for fixed investment spending will result in some factors to some extent.

Growth in the water infrastructure market in Brazil will lag the overall average slightly because it is somewhat more mature than it is in much of the region. However, opportunities will result from efforts to expand access to water supplies, mainly outside the country's larger cities.

Pump demand in the oil and gas market will trail the national average significantly due to sluggish growth in oil output. No company Petrobras has taken on exceptionally high levels of investment. It will face constraints in its ability to invest in exploration, particularly in offshore areas.

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SAMPLE  
TEXT

TABLE VII-3

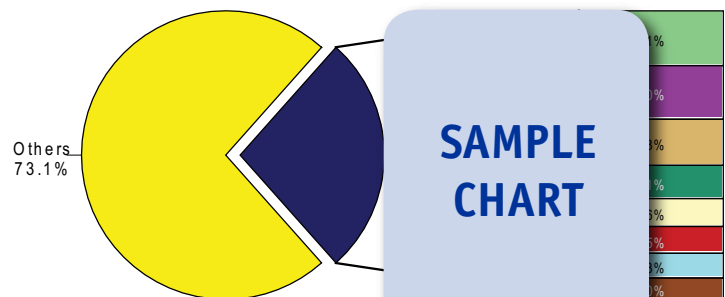
BRAZIL: PUMP SUPPLY & DEMAND  
(million dollars)

Item	2003	2008	2013	2018	2023
Population (million persons)					
\$ GDP/capita					
Gross Domestic Product (bil 2012\$)					
% fixed investment					
Gross Fixed Investment (bil 2012\$)					
Primary Energy Consump (quad Btu)					
Crude Oil Production (million barrels)					
\$ pump/capita					
\$ pump/fixed investment					
\$ pump/quadrillion Btu energy					
Pump Demand					
net exports					
Pump Shipments					
% Brazil					
C & S America Pump Shipments					

SAMPLE  
TABLE

CHART VIII-1

WORLD PUMP MARKET SHARE, 2013  
(\$64.4 billion)



SAMPLE  
CHART

## Sample Profile, Table & Forecast

**TABLE VII-4**  
**BRAZIL: PUMP DEMAND BY TYPE & MARKET**  
 (million dollars)

Item	2003	2008	2013	2018	2023
Pump Demand					
By Type:					
Centrifugal					
Positive Displacement					
Rotary					
Reciprocating					
Diaphragm					
Turbine					
Oilfield					
Specialty & All Other					
Drivers, Parts, & Accessories					
By Market:					
Process Manufacturers					
Water Infrastructure					
Oil & Gas					
Other					
% Brazil					
C & S America Pump Demand	16				00

**SAMPLE  
PROFILE**

**COMPANY PROFILES**

**Shanghai East Pump Group Company Limited**  
 1588 Fulian Road  
 Shanghai 201906  
 China  
 86-21-30  
 http://w

Annual S  
 Employ  
 Key Pro  
 submers

process, firefighting,

Shan of industrial pumps and other equipment. The state-owned company maintains 16 subsidiaries. Shanghai East Pump Group, which primarily serves customers in China, maintains eight manufacturing facilities in China, including sites in Shanghai, Zhejiang, Jiangsu, and Anhui.

The Company is active in the world pumps industry through the manufacture and sale of industrial pumps, including single-stage, multistage, chemical process, firefighting, submersible, and other types. These pumps can be utilized in numerous applications, including heating, ventilation, and air conditioning; water supply; firefighting; food and pharmaceuticals production; construction; iron and steel production; power generation; mining; pulp and paper production; and agricultural applications.

Among Shanghai East Pump Group's single-stage pumps are DFG inline, DFW close coupling, XA end suction, and DFSS and DFMS split casing pumps. Multistage pumps from the Company include DFL, DFCL, DFCLF, LG-B, and DL vertical types; MD mining pumps; and D and DG intermediate pressure boiler feed pumps. Representative

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**STUDY  
COVERAGE**

**World Pumps**, a Freedonia study, presents historical demand data (2003, 2008, 2013) plus forecasts (2018, 2023) by product type, market, region and for 36 countries. The study also considers market environment factors, examines the industry structure, evaluates company market share and profiles 35 competitors in the pumps industry worldwide.

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**OTHER STUDIES**

**Industrial Valves**

Demand for industrial valves in the US will rise 4.9 percent yearly to \$19.8 billion in 2018. The construction market will grow the fastest, as both residential and nonresidential segments rebound at double-digit rates. However, process manufacturing will remain the largest valve market. Demand for automatic valves will outpace standard valve sales. This study analyzes the \$15.6 billion US industrial valve industry, with forecasts for 2018 and 2023 by material, product, and market. The study also evaluates company market share and profiles industry participants.

#3234 .....January 2015 ..... \$5200

**Gaskets & Seals**

The US market for gaskets and seals is expected to expand 3.8 percent annually through 2018 to \$10.6 billion. Compression packings and molded seals and packings will be the fastest growing seals, while expanded graphite gaskets will be the most rapidly growing gasket products. The electrical and electronic products market will lead gains. This study analyzes the \$8.7 billion US gasket and seal industry, with forecasts for 2018 and 2023 by product and market. The study also evaluates company market share and profiles industry players.

#3226 .....October 2014 ..... \$5100

**World Filters**

Global demand for filters is projected to increase a healthy 6.2 percent annually to \$80.0 billion in 2018. Most gains will come from large, developing industrial areas with nascent regulatory schemes, such as China and Indonesia. Manufacturing will be the fastest growing market, with rising production benefiting aftermarket filter demand. This study analyzes the \$59.1 billion world filter industry, with forecasts for 2018 and 2023 by product, market, world region, and for 22 countries. The study also evaluates company market shares and profiles industry players.

#3152 .....July 2014..... \$6500

**Water & Wastewater Pipe**

Water and wastewater pipe demand in the US will grow 7.7 percent per year to \$18.1 billion in 2018. Municipal end uses will continue to claim a majority of demand, while building construction will be the fastest growing market. The best opportunities by product will be found in the dominant and fastest growing plastic pipe segment. This study analyzes the \$12.5 billion US water and wastewater pipe industry, with forecasts for 2018 and 2023 by market, application and product. The study also evaluates company market share and profiles industry players.

#3137 .....May 2014..... \$5200

**World Electric Transmission & Distribution Equipment**

Global demand for electric transmission and distribution (T&D) equipment will rise 6.7 percent annually to \$177 billion in 2017. The Asia/Pacific region, led by China, will continue to post the fastest gains. In North America and Western Europe, advances will be driven by the increasing proliferation of renewable energy projects. This study analyzes the \$127 billion world electric T&D equipment industry, with forecasts for 2017 and 2022 by market, product, world region and for 20 countries. The study also evaluates company market share and profiles industry players.

#3071 .....September 2013..... \$5900

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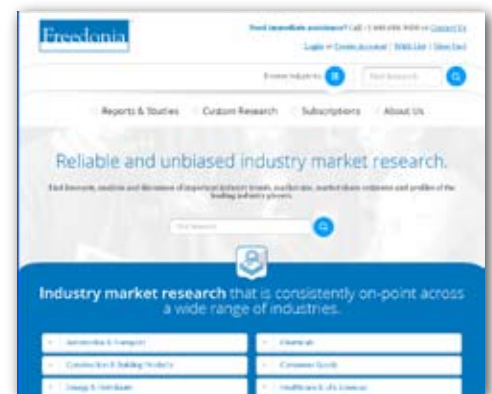
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