

Rotary Pumps Market to Reach USD 11.08 Billion by 2032 at 5.53% CAGR | Maximize Market Research

The components that civilisation cannot function without are rarely the ones that make headlines. Rotary pumps are proof of that.

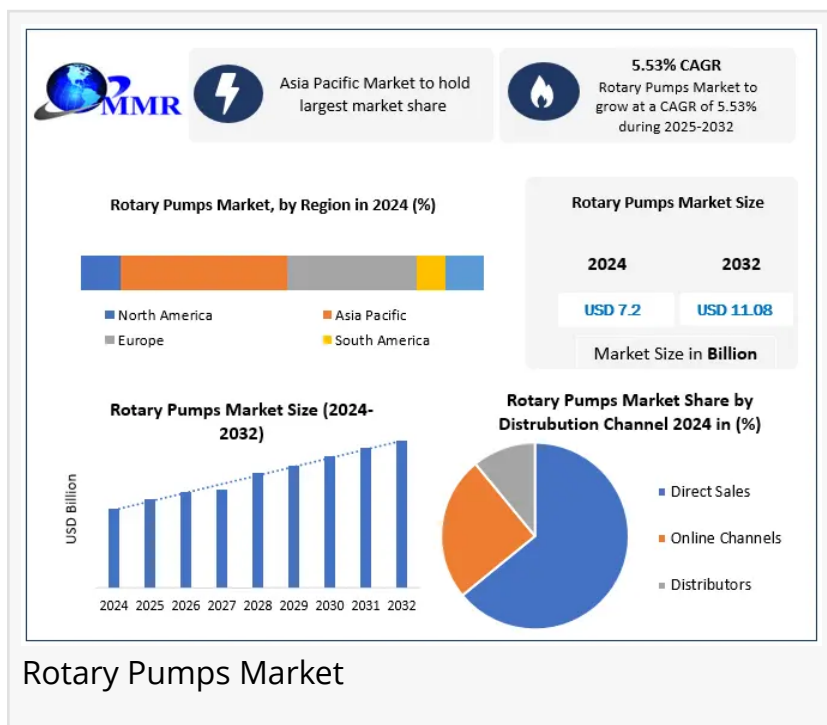
ROCKVILLE , MD, UNITED STATES, May 4, 2026 /EINPresswire.com/ -- Every Oil Field, Every Water Treatment Plant, Every Pharmaceutical Line Runs on a Rotary Pump. So Why Does a USD 7.2 Billion Market Still Fly Under Every Investor’s Radar?

[Rotary Pumps Market](#), valued at USD 7.2 Billion in 2024, is projected to reach USD 11.08 Billion by 2032 at a 5.53% CAGR. These positive displacement pumps are essential to oil and gas, wastewater treatment, and pharmaceuticals. Growth is anchored by regulatory mandates and high-value, shear-sensitive pharmaceutical applications. A structural shift toward IoT-enabled smart pumps is redefining the industry, utilizing predictive analytics to extend asset life by 40% and transforming maintenance into a data-driven operational platform.

“

A rotary pump is not a purchase decision: it is an operational commitment. The wrong specification costs ten times its price in downtime,” says Maximize Market Research.”

Maximize Market Research



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Rotary Pumps Market Intelligence Snapshot:

Market Size 2024 USD 7.2 Billion

Market Size 2032 USD 11.08 Billion

CAGR 2025-2032 5.53%

Dominant Application Oil and Gas

Dominant Segment Medium Capacity Pumps

Leading Region Asia-Pacific (~45% share)

Rotary Pumps Market India and South Korea

Smart Pump Benefit 20% reduction in unplanned downtime

Why Does Every Industrial Expansion Programme in the World Eventually Need a Rotary Pump?

Rotary pump growth is fueled by three forces: global wastewater infrastructure mandates to treat the 80% of discharge currently ignored, a projected USD 570 billion oil and gas upstream capex for 2025, and specialized green hydrogen missions in India and South Korea. High-specification demand is evidenced by Flowserve's USD 47 million ADNOC contract for pumps rated at 120°C and 250 bar. These premium, hydrogen-resistant alloy designs are now the procurement standard for global energy infrastructure.

What Is the One Technical Challenge That Separates a USD 500 Rotary Pump from a USD 50,000 One?

The rotary pump market's primary restraint is the abrasive fluid handling limitation: most rotary pump designs experience accelerated rotor wear when handling slurries or fluids with suspended solids above 50 microns, requiring costly advanced seal compounds and ceramic-coated rotors. This constraint limits market penetration in mining and aggregate processing applications, pushing buyers toward centrifugal alternatives. Simultaneously, the energy efficiency compliance gap is widening: the EU's EcoDesign Regulation for pumps (Regulation 547/2012) mandates minimum energy efficiency index (MEI) thresholds that legacy pump fleets in European manufacturing cannot meet, creating both a replacement opportunity and a compliance cost burden for operators.

Smart Rotary Pumps, Green Hydrogen, and the Predictive Maintenance Revolution: Three Opportunities Worth USD 3.88 Billion Through 2032

IoT-enabled smart pumps are the highest-margin growth corridor, using predictive analytics to cut downtime by 20% and extend asset life by 40%. Green hydrogen pipelines represent the fastest-emerging segment, requiring premium, PTFE-lined internals. Xylem's 2025 Singapore deployment validated this ROI, reducing emergency replacements by 34% and saving SGD 4.2

million. These advanced sensors and sealing compounds are now essential for modern infrastructure.

Where Is the Revenue Actually Concentrated Inside the USD 7.2 Billion Rotary Pump Market?

Medium capacity rotary pumps dominate by flow rate, serving the broadest industrial application range from food and beverage processing to chemical transfer. Oil and Gas commands the largest application revenue share, driven by upstream crude oil transfer, refinery process pumping, and midstream pipeline lube oil systems. Food and beverage processing pumps represent the fastest-growing application sub-segment, as stainless steel rotary pumps capable of handling viscous sauces, dairy products, and shear-sensitive biologics are mandated by FDA and EU food contact material regulations. Direct sales is the dominant distribution channel, accounting for the largest revenue share as OEM-level procurement relationships are locked in at specification stage.

By Flow Rate (Capacity)

Low-Capacity Pump

Medium Capacity Pump (Dominant Segment)

High-Capacity Pump

By Distribution Channel

Direct Sales (Dominant Channel)

Distributors

Online Channels

By Application

Oil and Gas (Largest Revenue Share)

Chemical

Power Generation

Water and Wastewater Treatment

Food and Beverage (Fastest Growing)

Pharmaceutical

Others

By Region

Asia-Pacific (Dominant, ~45% share)

North America

Europe

Middle East and Africa

South America

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Asia-Pacific Owns Half the Market. North America Controls the Technology Standard. Here Is Why Both Statements Are True Simultaneously.

Asia-Pacific: The Volume Engine Running at 45% Market Share

Asia-Pacific commands the largest Rotary Pump Market Share at approximately 45%, driven by China's industrial expansion, India's National Infrastructure Pipeline of USD 1.4 trillion, and South Korea's hydrogen infrastructure investment. India's smart city programme is creating greenfield wastewater treatment infrastructure across 100 cities, generating procurement mandates for energy-efficient pumping solutions with remote monitoring capability. Industrial Metaverse integration is entering Asian manufacturing plants at a faster adoption rate than any other region, directly accelerating smart pump specification rates in new facility builds.

PROOF: In March 2025, IDEX Corporation's Pulsafeeder division secured a multi-year supply agreement with NTPC Limited, India's largest power utility, for rotary metering pumps across 12 new thermal and hydroelectric power stations. The contract, valued at USD 28 million over 3 years, represents NTPC's first system-wide specification of IoT-ready positive displacement pumps with integrated flow telemetry, establishing smart pump monitoring as the new infrastructure standard for Indian power generation procurement.

North America: The Technology Anchor and Premium Specification Market

North America commands the premium tier of the Global Rotary Pump Market, anchored by the United States' oil and gas sector capital expenditure, pharmaceutical manufacturing precision

requirements, and the world's highest concentration of IoT-enabled smart pump early adopters. The U.S. EPA's Clean Water Act enforcement cycle creates a non-discretionary replacement market for aging municipal wastewater infrastructure, generating structural rotary pump demand independent of economic cycles.

Who Actually Controls the Rotary Pump Market and Where Is the Next Competitive Disruption Coming From?

The Global Rotary Pumps Market features an oligopolistic upper tier anchored by Flowserve Corporation, Dover Corporation, Xylem Inc., IDEX Corporation, and SPX Flow, which collectively dominate through OEM-level customer relationships, proprietary seal technology, and global service networks. Alfa Laval and KSB Group lead in the European food, beverage, and chemical segments. Gardner Denver competes in the pharmaceutical and industrial processing niches. The emerging disruption vector is digital pump-as-a-service models, where manufacturers provide pumps at zero upfront capex in exchange for long-term data and maintenance contracts, converting one-time equipment revenue into recurring subscription income.

Rotary Pumps Market Key Players:

Flowserve Corporation

Dover Corporation

Xylem Inc.

IDEX Corporation

SPX Flow Inc.

Alfa Laval AB

KSB Group

Gardner Denver (Ingersoll Rand)

Grundfos Holding A/S

Netzsch Pumpen and Systeme GmbH

Tuthill Corporation

Roper Technologies Inc.

Verder Group

PSG (Dover)

Viking Pump Inc.

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Key Recent Developments in the Global Rotary Pumps Market

March 2025: IDEX Corporation secured a USD 28 million 3-year supply agreement with NTPC Limited, India, for IoT-ready rotary metering pumps across 12 new power stations, establishing smart pump monitoring as India's new power infrastructure procurement standard.

February 2025: Xylem Inc. deployed its Flygt SmartPump platform across 340 PUB wastewater stations in Singapore, reducing emergency replacements by 34% and delivering SGD 4.2 million in annual maintenance savings across the network.

Q1 2025: Flowserve Corporation was awarded a USD 47 million contract by ADNOC for high-viscosity positive displacement pumps at the Ruwais LNG terminal in Abu Dhabi, the largest single rotary pump contract in Middle East LNG infrastructure history.

October 2024: Alfa Laval launched its SR3 series stainless steel rotary lobe pumps with integrated CIP (Clean-in-Place) validation capability, achieving EU food contact material compliance and cutting hygiene validation time by 60% versus previous generation designs.

July 2024: Netzsch unveiled its NEMO progressing cavity pump series with hydrogen embrittlement-resistant duplex stainless steel internals, the first commercially available rotary pump design certified for hydrogen pipeline service under ISO 19880-3 and EU PED 2014/68/EU simultaneously.

FAQs: Global Rotary Pumps Market

Q1. Market Size?

Ans. Valued at USD 7.2B in 2024; projected to reach USD 11.08B by 2032 (5.53% CAGR).

Q2. Top Applications?

Ans. Oil and gas leads in revenue share. Food and beverage is the fastest-growing due to hygienic mandates for shear-sensitive liquids.

Q3. IoT Benefits?

Ans. Smart pumps reduce downtime by 20% and extend asset life by 40%. Xylem's Singapore project saved SGD 4.2M annually, proving high ROI.

Analyst Perspective

Analysts at Maximize Market Research classify the 5.53% CAGR through 2032 as a structurally anchored trajectory across four non-discretionary demand sectors that have never simultaneously contracted in any recorded economic cycle: oil and gas infrastructure, municipal water and wastewater treatment, pharmaceutical manufacturing, and food processing. The Rotary Pump Market demand outlook is being reshaped by three compounding dynamics that were not present in the previous forecast cycle: the green hydrogen infrastructure buildout is creating an entirely new pump specification tier; the industrial metaverse and Industry 4.0 integration is converting pump data into the most valuable operational intelligence in manufacturing plants; and the EU EcoDesign Regulation replacement mandate is structurally accelerating European fleet refresh cycles. Operators and investors who position in IoT-enabled

smart pump platforms and premium hydrogen embrittlement resistance specifications before 2027 will command the market's highest margin segments through the 2032 horizon.

Related Reports:

Rotary Pumps Market (This Report): <https://www.maximizemarketresearch.com/market-report/rotary-pumps-market/274315/>

Rotary Pumps Market by Flow Rate (Low, Medium, High Capacity), Distribution Channel, Application (Oil and Gas, Chemical, Food, Pharmaceutical, Water Treatment), and Region, Global Forecast to 2032

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Maximize Market Research is a premier global consulting firm headquartered in Pune, India, serving clients across 45+ countries with high-granularity market intelligence across Industrial Equipment, Energy, and Chemical Processing sectors, empowering enterprises with data-driven insights to make strategic decisions with confidence.

Domain Focus

This report falls under Maximize Market Research's Engineering and Manufacturing domain, spanning rotary pumps, positive displacement fluid handling, IoT-enabled smart pump systems, and industrial automation infrastructure across 45+ countries, delivering the intelligence procurement directors, plant engineers, and infrastructure investors need to navigate the evolving global industrial fluid handling landscape with precision through 2032.

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