

Frost &amp; Sullivan Research Service

Published: 29 Sep 2006

## European Pumps in the Water and Waste Water Markets

[→ SERVICE HOMEPAGE](#)[→ RESEARCH OVERVIEW](#)[→ MARKET OVERVIEW](#)[→ FURTHER INFORMATION](#)[→ TECHNOLOGIES](#)[→ TABLE OF CONTENTS](#)[→ LIST OF FIGURES](#)[→ ORDERING INFORMATION](#)

### Research Overview

This *Frost & Sullivan* research service titled *European Pumps in the Water and Waste Water Markets* provides a comprehensive analysis of key market trends and the competitive structure. The study also describes market drivers, restraints, pricing trends and includes a geographic analysis. In this research, *Frost & Sullivan's* expert analysts thoroughly examine the following markets: centrifugal pumps, positive displacement pumps.

This analysis is available through our *Industrial Automation and Process Control* Growth Partnership Services program. With this program, clients receive industry-leading market research such as this, along with technical and econometric data and many interactive features including Analyst Inquiry Time and Client Councils. For more information on this custom subscription service, please [click here](#).

### Frost & Sullivan Growth Partnership Service

Based on extensive and in-depth research, real-world consulting work, and new theories tested in hundreds of companies across many industries, *Frost & Sullivan* has evolved its Growth Partnership Services (GPS) program that provides established and emerging firms with powerful growth visions. Moving beyond token mission statements, GPS provides an actionable vision to growth consulting partners by illustrating how key intelligence and strategic research based on defined goals can guide day-to-day behavior and overall company direction. The foundation of *Frost & Sullivan's* GPS includes:

- Assisting companies to reach their full potential in the core business
- Providing growth strategies to help companies expand into related businesses
- Preemptively redefining the core business during market turbulence
- Applying the *Frost & Sullivan* framework to identify and address common mistakes resulting from misaligned corporate strategies
- Recommending growth management strategies through continuous partnership

To maximize the potential for growth within a firm's internal and external environment, *Frost & Sullivan* consultants can facilitate the creation of strategic programs that deliver improved market success. *Frost & Sullivan's* strengths lie in combining strategic understanding with market expertise and applying these with absolute commitment to its clients' growth.

### Technologies

The following technologies are covered in this research:

- Positive displacement pumps
- Centrifugal pumps

### Market Overview

#### Stringent EU Legislation to Boost Demand for Pumps in the Water and Waste Water Market

At present, legislations in the European Union (EU) for higher standards of water and waste water treatment are driving demand for pumps in the water and waste water market. Despite market saturation in regions like Germany, Benelux and Scandinavia, the overall market is projected to experience slow, but consistent growth. The investment scenario in the emerging markets of eastern Europe and Iberia has been positive due to EU funding and increased participation from private companies in investing in water treatment projects. Large-scale implementation of water treatment plants is being undertaken in these regions, as well as parts of Italy and France. Underpinned by these trends, growing demand for pumps is projected to contribute to steady market growth in the future.

"The European Union's stringent directives that prescribe maintenance of uniform standard of water quality levels across Europe are the major driver of market growth," notes the analyst of this research service. "Moreover, the urban waste water treatment directive (UWWTD), which provides guidelines to identify water bodies that need urgent water treatment, has also intensified pressure on local authorities of respective regions for improved water and waste water treatment." Currently, regions like eastern Europe and Iberia have poor networking with respect to water

distribution and wastewater treatment. In particular, the accession countries face the impact of the EU regulation the most, due to the time span within which the directives have to be implemented. While there are challenges in the form of investment flow and improper water distribution and treatment infrastructure, these are likely to be overcome in the future by proactive operational efficiency of the municipal and other related authorities. Accordingly, market revenues are projected to increase from \$1.48 billion in 2005 to reach \$1.84 billion by 2012.

### **Value-added Services Crucial to Create Product Differentiation**

The markets are witnessing high competition and manufacturers are faced with the key challenge of investing in research and development (R&D). In particular, there is greater need for innovation in Germany and the western European regions, where the markets are in the initial stages of maturity. The evident signs of market saturation and intensifying competition have compelled manufacturers to be more customer-friendly and provide complete pumping solutions including efficient service of pumps, to sustain customer loyalty and increase growth potential. Apart from competitive pricing, offering value-added services will assist manufacturers in enlarging their market share.

"With most parts of western and central European regions having already implemented the EU directives, the need to provide flexible and complete service of pumping equipments is essential," states the analyst. "Innovations in pump design have declined, and control and monitoring systems are likely to have a huge impact on the sale of pumps. Increased investments will need to be made in these areas, which will help differentiate the products and offer manufacturers a competitive advantage in the market."

### **Table Of Contents**

1. Executive Summary
  1. Introduction
    1. Market Overview
  2. Summary of Major Findings
    1. Growth Opportunities and Total Forecasts
    2. Analysis by Product Type
    3. Analysis by Geographic Region
    4. Competitive Trends
    5. Conclusion
2. Market Background
  1. Research Overview
    1. Aim of the Research
    2. Research Methodology
  2. Market Overview and Coverage
    1. Definitions and Coverage
  3. European Background
    1. Pump Industry Background
    2. Macroeconomic Indicators
3. Industry Challenges
  1. Challenges Facing the Industry in the Water and Waste Water Treatment Market
    1. Identification of Challenges
4. Forecasts for Total European Pumps in the Water and Waste Water Market
  1. Market Overview
    1. Introduction
  2. Market Forecasts
    1. Market Engineering Measurements
    2. Market Drivers
      - a. Transposing and Implementing EU Water Directives
      - b. Increasing Role of Private Companies in Developing Countries
      - c. EU Funding for Water and Waste Water Infrastructure
      - d. Need to Change Inefficient and Obsolete Treatment Plants
      - e. Increasing User Awareness on Water Management and Concern for Hygiene
    3. Market Restraints
      - a. Intense Competition from Cheaper Imported Pumps
      - b. Gap between Funding Provided and Required Investment
      - c. Underdeveloped Water Supply and Sewerage Network
    4. Market Revenue Forecasts
  3. Market Trends
    1. Trends by Product Type
    2. Trends by Geographic Region
    3. Pricing Trends
  4. Competitive Analysis
    1. Competitive Structure
    2. Competitive Environment
  5. Market Share Analysis and Strategies
    1. Market Share Analysis
    2. Strategic Recommendations

## 5. Regional Analysis of European Pumps in the Water and Waste Water Market

1. Market Overview
  1. Introduction
2. Forecasts of the German Market
  1. Market Overview
  2. Market Engineering Measurements
  3. Revenue Forecasts
  4. Trends by Product Type
  5. Pricing Trends
  6. Competitive Structure and Environment
3. Forecasts of the United Kingdom Market
  1. Market Overview
  2. Market Engineering Measurements
  3. Revenue Forecasts
  4. Trends by Product Type
  5. Pricing Trends
  6. Competitive Structure and Environment
4. Forecasts of the French Market
  1. Market Overview
  2. Market Engineering Measurements
  3. Revenue Forecasts
  4. Trends by Product Type
  5. Pricing Trends
  6. Competitive Structure and Environment
5. Forecasts of the Italian Market
  1. Market Overview
  2. Market Engineering Measurements
  3. Revenue Forecasts
  4. Trends by Product Type
  5. Pricing Trends
  6. Competitive Structure and Environment
6. Forecasts of the Scandinavian Market
  1. Market Overview
  2. Market Engineering Measurements
  3. Revenue Forecasts
  4. Trends by Product Type
  5. Pricing Trends
  6. Competitive Structure and Environment
7. Forecasts of the Iberian Market
  1. Market Overview
  2. Market Engineering Measurements
  3. Revenue Forecasts
  4. Trends by Product Type
  5. Pricing Trends
  6. Competitive Structure and Environment
8. Forecasts of the Benelux Market
  1. Market Overview
  2. Market Engineering Measurements
  3. Revenue Forecasts
  4. Trends by Product Type
  5. Pricing Trends
  6. Competitive Structure and Environment
9. Forecasts of the Eastern European Market
  1. Market Overview
  2. Market Engineering Measurements
  3. Revenue Forecasts
  4. Trends by Product Type
  5. Pricing Trends
  6. Competitive Structure and Environment
10. Forecasts of the Rest-of-Western European Market
  1. Market Overview
  2. Market Engineering Measurements
  3. Revenue Forecasts
  4. Trends by Product Type
  5. Pricing Trends
  6. Competitive Structure and Environment

## 6. Database of Key Industry Participants

1. List of Selected Companies
  1. Centrifugal Pump Manufacturers
  2. Positive Displacement Pump Manufacturers

## List of Figures

### Chapter 3

- Total Pumps in Water and Waste Water Market: Impact of Top Seven Industry Challenges (Europe), 2006-2012

### Chapter 4

- Total Pumps in the Water and Waste Water Market: Market Drivers Ranked in Order of Impact (Europe), 2006-2012
- Total Pumps in the Water and Waste Water Market: Market Restraints Ranked in Order of Impact (Europe), 2006-2012
- Total Pumps in the Water and Waste Water Market: Revenue Forecasts (Europe), 2002-2012
- Total Pumps in the Water and Waste Water Market: Revenue Forecasts by Product Type (Europe), 2002-2012
- Centrifugal Pumps in the Water and Waste Water Market: Per cent of Revenues by Product Type (Europe), 2002-2012
- Positive Displacement Pumps in the Water and Waste Water Market: Per cent of Revenues by Product Type (Europe), 2002-2012
- Total Pumps in the Water and Waste Water Market: Per cent of Revenues by Geographic Region (Europe), 2002-2012
- Total Pumps in the Water and Waste Water Market: Competitive Structure (Europe), 2005
- Total Pumps in the Water and Waste Water Market: Market Share Trends of Major Market Participants (Europe), 2005

### Chapter 5

- Total Pumps in the Water and Waste Water Market: Revenue Forecasts (Germany), 2002-2012
- Total Pumps in the Water and Waste Water Market: Revenue Forecasts by Product Type (Germany), 2002-2012
- Centrifugal Pumps in the Water and Waste Water Market: Per cent of Revenues by Product Type (Germany), 2002-2012
- Positive Displacement Pumps in the Water and Waste Water Market: Per cent of Revenues by Product Type (Germany), 2002-2012
- Total Pumps in the Water and Waste Water Market: Competitive Structure (Germany), 2005
- Total Pumps in the Water and Waste Water Market: Revenue Forecasts (United Kingdom), 2002-2012
- Total Pumps in the Water and Waste Water Market: Revenue Forecasts by Product Type (United Kingdom), 2002-2012
- Centrifugal Pumps in the Water and Waste Water Market: Per cent of Revenues by Product Type (United Kingdom), 2002-2012
- Positive Displacement Pumps in the Water and Waste Water Market: Per cent of Revenues by Product Type (United Kingdom), 2002-2012
- Total Pumps in the Water and Waste Water Market: Competitive Structure (United Kingdom), 2005
- Total Pumps in the Water and Waste Water Market: Revenue Forecasts (France), 2002-2012
- Total Pumps in the Water and Waste Water Market: Revenue Forecasts by Product Type (France), 2002-2012
- Centrifugal Pumps in the Water and Waste Water Market: Per cent of Revenues by Product Type (France), 2002-2012
- Positive Displacement Pumps in the Water and Waste Water Market: Per cent of Revenues by Product Type (France), 2002-2012
- Total Pumps in the Water and Waste Water Market: Competitive Structure (France), 2005
- Total Pumps in the Water and Waste Water Market: Revenue Forecasts (Italy), 2002-2012
- Total Pumps in the Water and Waste Water Market: Revenue Forecasts by Product Type (Italy), 2002-2012
- Centrifugal Pumps in the Water and Waste Water Market: Per cent of Revenues by Product Type (Italy), 2002-2012
- Positive Displacement Pumps in the Water and Waste Water Market: Per cent of Revenues by Product Type (Italy), 2002-2012
- Total Pumps in the Water and Waste Water Market: Competitive Structure (Italy), 2005

- Total Pumps in the Water and Waste Water Market: Revenue Forecasts (Scandinavia), 2002-2012
- Total Pumps in the Water and Waste Water Market: Revenue Forecasts by Product Type (Scandinavia), 2002-2012
- Centrifugal Pumps in the Water and Waste Water Market: Per cent of Revenues by Product Type (Scandinavia), 2002-2012
- Positive Displacement Pumps in the Water and Waste Water Market: Per cent of Revenues by Product Type (Scandinavia), 2002-2012
- Total Pumps in the Water and Waste Water Market: Competitive Structure (Scandinavia), 2005
- Total Pumps in the Water and Waste Water Market: Revenue Forecasts (Iberia), 2002-2012
- Total Pumps in the Water and Waste Water Market: Revenue Forecasts by Product Type (Iberia), 2002-2012
- Centrifugal Pumps in the Water and Waste Water Market: Per cent of Revenues by Product Type (Iberia), 2002-2012
- Positive Displacement Pumps in the Water and Waste Water Market: Per cent of Revenues by Product Type (Iberia), 2002-2012
- Total Pumps in the Water and Waste Water Market: Competitive Structure (Iberia), 2005
- Total Pumps in the Water and Waste Water Market: Revenue Forecasts (Benelux), 2002-2012
- Total Pumps in the Water and Waste Water Market: Revenue Forecasts by Product Type (Benelux), 2002-2012
- Centrifugal Pumps in the Water and Waste Water Market: Per cent of Revenues by Product Type (Benelux), 2002-2012
- Positive Displacement Pumps in the Water and Waste Water Market: Per cent of Revenues by Product Type (Benelux), 2002-2012
- Total Pumps in the Water and Waste Water Market: Competitive Structure (Benelux), 2005
- Total Pumps in the Water and Waste Water Market: Revenue Forecasts (Eastern Europe), 2002-2012
- Total Pumps in the Water and Waste Water Market: Revenue Forecasts by Product Type (Eastern Europe), 2002-2012
- Centrifugal Pumps in the Water and Waste Water Market: Per cent of Revenues by Product Type (Eastern Europe), 2002-2012
- Positive Displacement Pumps in the Water and Waste Water Market: Per cent of Revenues by Product Type (Eastern Europe), 2002-2012
- Total Pumps in the Water and Waste Water Market: Competitive Structure (Eastern Europe), 2005
- Total Pumps in the Water and Waste Water Market: Revenue Forecasts (Rest-of-Western Europe), 2002-2012
- Total Pumps in the Water and Waste Water Market: Revenue Forecasts by Product Type (Rest-of-Western Europe), 2002-2012
- Centrifugal Pumps in the Water and Waste Water Market: Per cent of Revenues by Product Type (Rest-of-Western Europe), 2002-2012
- Positive Displacement Pumps in the Water and Waste Water Market: Per cent of Revenues by Product Type (Rest-of-Western Europe), 2002-2012
- Total Pumps in the Water and Waste Water Market: Competitive Structure (Rest-of-Western Europe), 2005

### More Information

Please print out this form, complete your details and fax it to Frost & Sullivan:

**Latin & North America:**  
 Frost & Sullivan  
 Sales Department  
 7550 West Interstate 10  
 Suite 400  
 San Antonio  
 Texas 78229-5616. USA  
 Fax: 888.690.3329

**Asia Pacific:**  
 Frost & Sullivan  
 Sales Department  
 100 Beach Road  
 #29-01/11, Shaw Tower  
 Singapore 189702  
 SINGAPORE  
 Fax: +65 68900988

**EMEA:**  
 Frost & Sullivan  
 Sales Department  
 Sullivan House  
 4 Grosvenor Gardens  
 London SW1W 0DH. UK  
 Fax: +44(0)20 7730 3343

### SERVICE INQUIRY

**I would like information on:**

European Pumps in the Water and Waste Water Markets (M012-01-00-00-00)

**YOUR DETAILS**

Name	Address
Title	
Company	
Telephone	State/Province
Fax	Zip/Postal Code
Email	Country

**Select the markets that interest you**

Aerospace & Defense  
 Automotive & Transportation  
 Chemicals, Materials & Foods  
 Consumer Products  
 Electronics & Surface Mount Technologies  
 Energy & Power Systems  
 Environment & Building Technologies  
 Healthcare  
 Industrial Automation  
 Information & Communication  
 Technologies

**Tell us the services that interest you**

Growth Partnership Services  
 Growth Consulting  
 Growth Workshops  
 Events  
 Corporate Training & Development  
 Best Practices Research  
 Technical Research  
 Econometric Research  
 Market Engineering Research  
 Customer Research  
 Financial Benchmarking & Analysis  
 Stratecast: Telecoms Strategic  
 Forecasting  
 Career Opportunities  
 Press Support Services

**Comments:** (For instance 'Please send me more information on...')
**Further Information**

Enquiries from:

**Asia Pacific:**

Tel: +65 68900999

Email: [apacfrost@frost.com](mailto:apacfrost@frost.com)

Enquiries from:

**Europe, Middle East & Africa:**

Tel: +44 (0) 20 7343 8383

Email: [enquiries@frost.com](mailto:enquiries@frost.com)

Enquiries from:

**Latin America:**

Tel: +1.877.GO.FROST (463.7678)

Email: [myfrost@frost.com](mailto:myfrost@frost.com)

Enquiries from:

**North America:**

Tel: +1.877.GO.FROST (463.7678)

Email: [myfrost@frost.com](mailto:myfrost@frost.com)**For a full list of our offices [click here](#).**

Web Analytics