



PRESS RELEASE

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Pump Market UK 2010-2014

AMA report reviews the UK pump market and considers future developments

"The core product sectors of the UK pump market include centrifugal and positive displacement pumps, with centrifugal pumps accounting for around 62% of the UK pump market, and positive displacement pumps accounting for the balance. Key application areas include industrial and manufacturing, water and sewage, power generation, oil and gas, marine, and domestic and leisure."

A brief summary of the new edition of the report is included on the following page.

Priced at £650, the report is currently available from AMA Research Ltd,
Telephone 01242 235724 or e-mail at sales@amaresearch.co.uk.

Editors Note:

Attached is a summary of the report. Please use brief extracts if you wish, **but we would request that references to company market shares are not published without our prior permission.**

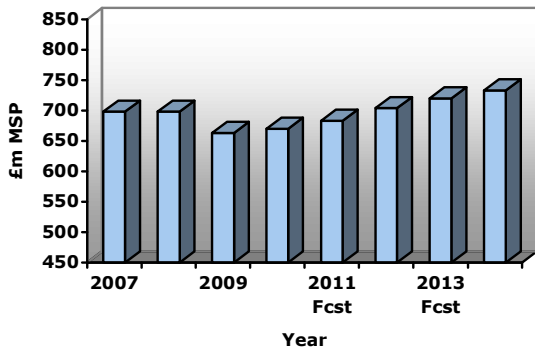
If you would like to speak to an author of this report, please contact Keith Taylor or Chris Moore on (01242) 235724.

Please include our web address and telephone number on any review printed, it would also be appreciated if a copy of the review could be forwarded to AMA Research. Thank you.

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Pump Market UK 2010-2014

Pumps Market 2007-2014 at £m MSP



The UK pump market is currently estimated to be worth £663 million at manufacturers selling prices (MSP) in 2009. The core product sectors of the UK pump market include centrifugal and positive displacement pumps, with centrifugal pumps accounting for around 62% of the UK pump market, and positive displacement pumps accounting for approximately 38%. Key application areas include industrial and manufacturing, water and sewage, power generation, oil and gas, marine, and domestic and leisure.

Market decline over the last two years has been relatively limited, and difficult to estimate, reflecting the variable performance of different product groups and the wide range of end use markets – including industrial, oil and gas, marine, power generation, and water. In addition, many sectors of the UK pump industry were sustained by significant levels of exports and aftermarket sales, reflecting the relatively high installed base of pumps in the UK market (and overseas).

Key factors underpinning market growth include regulatory legislation, (e.g. flue gas desulphurisation, also condensate pumps), increasing power generation to meet rising electricity consumption, the short term impact of climatic factors such as flooding, and the water industry's asset management programmes, currently AMP5.

Life extension projects for the ageing power generation asset base will tend to provide some additional low level long term motivation for certain pump types. In addition, the nuclear power station new build sector is also likely to provide long term, low level motivation for pumps used in the **nuclear island**, and in the associated **conventional** applications, with a reported ten sites identified in England and Wales.

Long-term, low-level growth in shipbuilding for the Royal Navy is likely to provide some additional motivation for pumps used in marine applications. Other niche sector pump growth opportunities, include, for example, high purity pumping for the biotechnology/pharmaceutical sector.

World wide investment in the oil and gas industries is likely to stimulate investment in upstream and downstream capital projects including process pumps. Rising raw material costs are likely to tend to inflate market values in the medium to long term, reflecting greater demand from the emerging economies.

Current forecasts indicate that the UK pump market is likely to continue to grow very slowly through to 2014, reaching a value of around £733 million.

AMA Research's report "**Pump Market – UK 2010-2014**" is available in hard copy or electronic format for £650 and can be ordered online at www.amaresearch.co.uk or by calling 01242 235724.