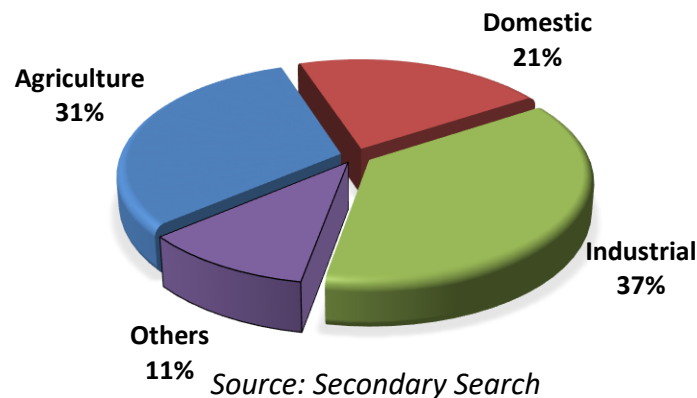


The market for pumps in India

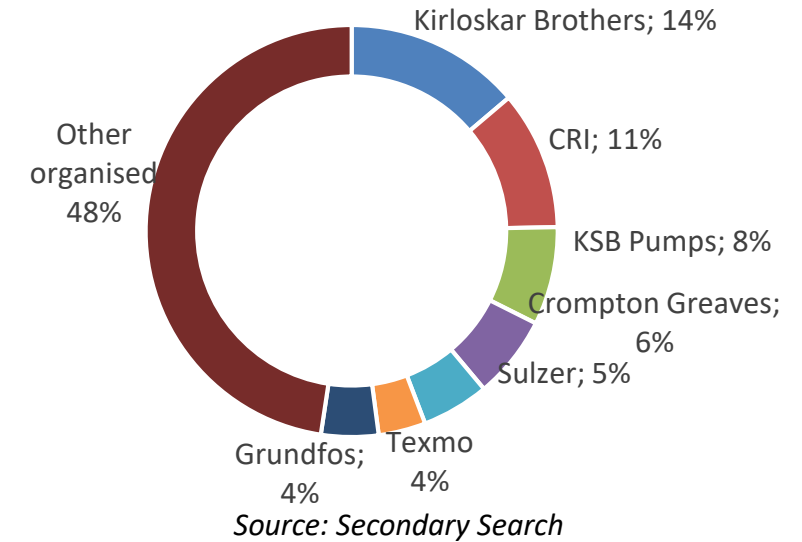
- The total market for pumps in India is estimated at around INR 210 billion in 2016; of this the organised sector contributes around INR 120 billion
- The pump industry in India is fragmented with around 300 organized players and over 600 players in the unorganized sector
- The organized pump market has a small number of large domestic and multinational players and a large number of mid sized players
- The main manufacturing clusters are Coimbatore, Rajkot and Ahmedabad
- The industrial applications accounts for around 37% of the demand followed by agriculture at around 31%
- Demand for domestic pumps, used in residential and commercial buildings, accounted for 21% of the market

Organised pump market: Break up by application
Total: INR 120 billion



- There are over 350 brands of pumps in India registered under Bureau of Energy Efficiency
- Submersible pumpsets are among the leading pump categories followed by openwell submersible pumpsets and electric monoset pumps
- Major users of industrial pumps include cement, steel and Oil & gas industries as well as public water supply
- Small and medium sized pumps in ratings between 0.25-25 hp are used in agriculture and domestic housing
- Pumps in rating of up to 500hp are used across industries and categories with 500 hp rating and above are used for municipal / irrigation projects and power plants
- India exports pumps to nearly 70 countries ,key export destinations are Saudi Arabia, Yemen, South Africa, Kenya, Uganda, Tanzania, Egypt, USA, Germany and Russia
- Imports account for less than 10 percent of pumps sold in India , key import sources are China, Japan, Italy & US
- Kirloskar Brothers in the market leader with a 14% share of the organized pump market in India
- Other leading players include CRI Pumps, KSB Pumps and Crompton Greaves, Grundfos, WPIL, Texmo, Shakthi

Pump market share by key players
Total: INR 120 billion



Recently, energy efficiency norms for pumps are being adopted across the country -

- Star labeled and solar pumps are given preference in the market - The Government of India envisages the installation of 100,000 solar water pumps for irrigation and drinking water purposes across the country.
- Energy Efficiency Services Limited (EESL) intends to replace 20 million grid connected pump sets with BEE star-rated energy efficient agricultural pumps