

Global Fluid Power Pump and Motor Market 2026

Market size, segmentation, competitive landscape and outlook

2021–2031

Moving forward, together



Every one of us has, at some point, heard the line from *Alice in Wonderland*: “It takes all the running you can do, to keep in the same place. If you want to get somewhere else, you must run at least twice as fast.” Cliché as the quote has become, our world is changing at extraordinary speed. And yet, to my mind, it matters not only to run fast, but — more importantly — to know where you are running.

We see ourselves as the navigator, ready at the right moment to point out the correct course. By providing current, timely information for the decisions that matter, we aim to protect our clients from missteps and to help them find new opportunities.

It matters to us that you are satisfied with the work we have done. If you have any questions about this report, we will be glad to answer them.

ANDREY SHEVCHENKO, Managing Partner

© shev.io — All rights reserved.

Disclaimer

This report was prepared by shev.io solely for information purposes. shev.io does not guarantee the accuracy and completeness of all information contained in the report, as the data in some sources may have been distorted inadvertently or deliberately. The information presented in this report must not be construed, directly or indirectly, as containing recommendations for further business action. All opinions and estimates contained in this report reflect the authors' judgement as at the date of publication and may be changed without notice.

shev.io accepts no liability for any loss or damage arising from any third party's use of the information contained in this report, including published opinions or conclusions, or for consequences caused by the incompleteness of the information presented. The information presented in this report is obtained from open sources. Additional information may be provided on request.

This document, or any part of it, may not be distributed without the written permission of shev.io, nor reproduced by any means.

© shev.io — All rights reserved.

Terms of use

This report is provided to the user under a **non-exclusive, non-transferable, limited licence** solely for internal use within the purposes for which the report was lawfully acquired.

The user **may not**, in whole or in part, transfer, sell, gift, publish or otherwise distribute the report to third parties, nor pass it to any other legal entities, partner organisations or external teams (including affiliated companies). It is prohibited to place the report (or fragments of it) in the public domain (websites, social networks, messengers, file-sharing services, open-link cloud storage) or to provide access through third-party services where this allows third parties to review the materials.

If the report is purchased by a **company**, its use is permitted **only by that company's employees** for internal tasks. Passing the report to contractors, consultants, freelancers, agencies and any external parties is prohibited.

All exclusive rights to the report — including its structure, texts, data selection, visualisations, tables, charts and design elements — belong to the rights holder (shev.io) or are used on lawful grounds. The user receives the right to use the report only within these terms.

Without shev.io's written consent it is prohibited to create derivative products based on the report, to use it as part of a commercially distributed product or service, or to remove or alter copyright notices.

The use of **short quotations** and fragments is permitted **only in internal documentation** (internal memos, reports, presentations, working correspondence), provided the meaning and context are preserved and the source is credited: *shev.io*. Any publication or use of the materials in places accessible to third parties is permitted only with shev.io's prior written consent.

© shev.io — All rights reserved.

Market at a glance

This demo shows the **form and depth** of the report — real narrative with the detailed figures and tables masked as “XXX”. When you order the report, every figure is finalised and verified for your copy, and the full report is delivered within 24–72 hours.

Indicator	Value
Market size (2025)	USD 20 bn
Forecast (2031)	USD 28.4 bn
CAGR (2021–2031)	6%
Study period	2021–2031
Largest region	Asia-Pacific · 36%
Fastest-growing region	Asia-Pacific · 7.2%
Market concentration	Moderate
Licence	Individual / Company

The global fluid power pump and motor market reaches USD XXX billion by 2031, advancing from USD XXX billion in 2025 at a XX% CAGR, according to shev.io Research. Hydraulic pumps lead component spending, while mobile machinery accounts for the largest application share. Asia-Pacific combines the largest regional market with the fastest growth, supported by construction equipment production, industrial investment and agricultural mechanisation. Competitive advantage increasingly rests on efficient displacement control, electronic integration, application engineering and dependable replacement-part availability.

© shev.io — All rights reserved.

Table of contents

1 Introduction and Market Definition

1.1 Product Scope, Revenue Boundary and Exclusions

1.2 Study Period, Currency and Geographic Coverage

2 Research Methodology

2.1 Secondary Sources, Classification Mapping and Demand Reconciliation

2.2 Forecast Design, Validation and Planned Primary Research

3 Executive Summary and Market Snapshot

4 Market Dynamics

4.1 Growth Drivers and Directional CAGR Effects

4.2 Restraints, Substitution and Equipment-Cycle Exposure

4.3 Porter's Five Forces and Value-Chain Analysis

5 Market Size and Forecasts by Segment

5.1 By Product Type

5.2 By Mechanism

5.3 By Application

5.4 By Sales Channel

6 Market Size and Forecasts by Geography

6.1 North America

6.1.1 United States

6.1.2 Canada

6.1.3 Mexico

6.2 Europe

6.2.1 Germany

6.2.2 Italy

6.2.3 France

6.2.4 Rest of Europe

6.3 Asia-Pacific

6.3.1 China

6.3.2 Japan

6.3.3 India

6.3.4 South Korea

6.3.5 Rest of Asia-Pacific

6.4 Latin America

6.4.1 Brazil

6.4.2 Rest of Latin America

6.5 Middle East and Africa

© shev.io — All rights reserved.

6.5.1 Saudi Arabia
6.5.2 South Africa
6.5.3 Rest of Middle East and Africa

7 Competitive Landscape

7.1 Company Market Shares and Competitive Positioning
7.2 Company Profiles
7.2.1 Bosch Rexroth
7.2.2 Danfoss
7.2.3 Parker Hannifin
7.2.4 Kawasaki Heavy Industries
7.2.5 KYB
7.2.6 Bucher Hydraulics
7.2.7 HAWE Hydraulik
7.2.8 Linde Hydraulics
7.2.9 HYDAC
7.2.10 Interpump Group

8 Regulation and Industry Developments

8.1 Machinery Safety and Equipment Integration
8.2 Energy-Related Requirements and Materials Compliance
8.3 Corporate Transactions and Regulatory Milestones

9 Forecast and Opportunities

9.1 Base, Upside and Downside Scenarios
9.2 Product, Regional and Channel Opportunities
9.3 Strategic Priorities for Suppliers, OEMs and Investors

© shev.io — All rights reserved.

List of tables

Table 1. Product inclusion, exclusion and integrated-assembly allocation rules

Table 2. Source register, publication periods and classification crosswalks

Table 3. Forecast assumptions, currency treatment and validation status

Table 4. Global annual revenue, unit shipments, average selling price and growth, 2021–2031

Table 5. Annual revenue and unit shipments by product type, 2021–2031

Table 6. Annual revenue and unit shipments by mechanism, 2021–2031

Table 7. Annual revenue and unit shipments by application, 2021–2031

Table 8. Annual revenue and unit shipments by sales channel, 2021–2031

Table 9. Annual revenue and unit shipments by region, 2021–2031

Table 10. Base-year reconciliation of manufacturer revenue, apparent demand and component pricing

Table 11. Growth-driver mechanisms, affected applications, geographies and forecast horizons

Table 12. Market restraints, exposure indicators and supplier responses

Table 13. Porter's Five Forces assessment by product family

Table 14. Electrohydraulic versus electromechanical application suitability

Table 15. Product-type revenue, volume, average price, share and growth comparison, 2025 and 2031

Table 16. Mechanism revenue, volume, average price, share and growth comparison, 2025 and 2031

Table 17. Application revenue, volume, average price, share and growth comparison, 2025 and 2031

Table 18. Sales-channel revenue, volume, average price, share and growth comparison, 2025 and 2031

Table 19. North America annual revenue and unit shipments by country: United States, Canada and Mexico, 2021–2031

Table 20. Europe annual revenue and unit shipments by country: Germany, Italy, France and Rest of Europe, 2021–2031

Table 21. Asia-Pacific annual revenue and unit shipments by country: China, Japan, India, South Korea and Rest of Asia-Pacific, 2021–2031

Table 22. Latin America annual revenue and unit shipments by country: Brazil and Rest of Latin America, 2021–2031

Table 23. Middle East and Africa annual revenue and unit shipments by country: Saudi Arabia, South Africa and Rest of Middle East and Africa, 2021–2031

Table 24. Supplier revenue, market share, ownership boundaries and portfolio comparison, 2025

Table 25. Bosch Rexroth company profile: products, in-scope revenue, capacity, footprint and strategy

Table 26. Danfoss company profile: products, in-scope revenue, capacity, footprint and strategy

Table 27. Parker Hannifin company profile: products, in-scope revenue, capacity, footprint and strategy

Table 28. Kawasaki Heavy Industries company profile: products, in-scope revenue, capacity, footprint and strategy

Table 29. KYB company profile: products, in-scope revenue, capacity, footprint and strategy

© shev.io — All rights reserved.

Table 30. Bucher Hydraulics company profile: products, in-scope revenue, capacity, footprint and strategy

Table 31. HAWE Hydraulik company profile: products, in-scope revenue, capacity, footprint and strategy

Table 32. Linde Hydraulics company profile: products, in-scope revenue, capacity, footprint and strategy

Table 33. HYDAC company profile: products, in-scope revenue, capacity, footprint and strategy

Table 34. Interpump Group company profile: products, in-scope revenue, capacity, footprint and strategy

Table 35. Regulatory requirements by jurisdiction, affected product and application date

Table 36. Selected corporate transactions and regulatory milestones

Table 37. OEM documentation, material declarations and integration responsibilities

Table 38. Scenario assumptions and revenue sensitivity to equipment demand, pricing and substitution

Table 39. Product, application and regional opportunity prioritisation

Table 40. Supplier and investor action matrix with commercial milestones

Table 41. Market value by year, USD bn

Table 42. Year-over-year value change

Table 43. Drivers — impact on forecast

Table 44. Restraints — impact on forecast

Table 45. Value by product Type, USD bn

Table 46. Value by mechanism, USD bn

Table 47. Value by application, USD bn

Table 48. Value by sales Channel, USD bn

Table 49. Market value by region, USD bn

Table 50. Market value by leading country, USD bn

Table 51. Leading companies

© shev.io — All rights reserved.

List of figures

Figure 1. Study coverage by product family and application

Figure 2. Source-coverage assessment by research workstream

Figure 3. Global fluid power pump and motor revenue, 2021–2031

Figure 4. Global component unit shipments, 2021–2031

Figure 5. Absolute revenue growth by product type, 2025–2031

Figure 6. Directional CAGR influence of growth drivers

Figure 7. Directional CAGR influence of market restraints

Figure 8. Market value share by product type, 2025

Figure 9. Market value share by mechanism, 2025

Figure 10. Market value share by application, 2025

Figure 11. Market value share by sales channel, 2025

Figure 12. Regional market value shares, 2025

Figure 13. Regional revenue CAGR, 2025–2031

Figure 14. Supplier market shares by in-scope pump and motor revenue, 2025

Figure 15. Competitive product-family coverage by profiled company

Figure 16. Regulatory relevance by product and integration category

Figure 17. Strategic significance of selected acquisitions and regulatory developments

Figure 18. Market revenue under base, upside and downside scenarios, 2031

Figure 19. Opportunity attractiveness by application and route to market

Figure 20. Value share by product Type, 2025

Figure 21. Value share by application, 2025

Figure 22. Growth rate by region, 2025-2031

© shev.io — All rights reserved.

Executive summary

The global fluid power pump and motor market reaches USD XXX billion by 2031, advancing from USD XXX billion in 2025 at a XX% CAGR, according to shev.io Research. Hydraulic pumps lead component spending, while mobile machinery accounts for the largest application share. Asia-Pacific combines the largest regional market with the fastest growth, supported by construction equipment production, industrial investment and agricultural mechanisation. Competitive advantage increasingly rests on efficient displacement control, electronic integration, application engineering and dependable replacement-part availability.

Indicator	Value
Market size 2025	XXX
Forecast 2031	XXX
CAGR	XXX
Largest region	XXX
Fastest region	XXX

Key findings

- shev.io Research places the 2025 global market at USD XXX billion and the 2031 market at USD XXX billion.
- Market revenue expands at a XX% CAGR between 2025 and 2031, adding USD XXX billion in annual component demand.
- Hydraulic pumps account for XX% of 2025 revenue, equivalent to USD XXX billion.
- Hydraulic motors contribute XX% of revenue, while pneumatic motors contribute XX%.
- Piston mechanisms represent XX% of market value, reflecting their importance in demanding mobile and industrial applications.
- Mobile machinery generates XX% of revenue, equivalent to USD XXX billion.
- OEM sales account for XX% of component revenue; replacement sales account for XX%.
- Asia-Pacific leads with a XX% share and a XX% forecast CAGR; Europe holds XX% and North America XX%.

© shev.io — All rights reserved.

Market size and forecast

Market value by year, USD bn

Indicator	2026	2027	2028	2029	2030	2031	CAGR
Market value, USD bn	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Market volume	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Production	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Imports	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Exports	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Apparent consumption	XXX	XXX	XXX	XXX	XXX	XXX	XXX

Source: XXX

Year-over-year value change

Indicator	2027	2028	2029	2030	2031	CAGR
Market value	X%	X%	X%	X%	X%	X%
Production	X%	X%	X%	X%	X%	X%
Imports	X%	X%	X%	X%	X%	X%
Exports	X%	X%	X%	X%	X%	X%

Source: XXX

© shev.io — All rights reserved.

Fluid Power Pump and Motor Market Trends and Growth Drivers

Fluid power demand is tied to machinery production, but component revenue also reflects the sophistication of the hydraulic circuit, the operating environment and the value placed on uptime. A compact gear pump and an electronically controlled piston unit occupy different price and performance positions. Understanding the market therefore requires separate treatment of component volumes, product mix, pricing and replacement demand.

Electrification creates opposing forces within the same equipment portfolio. Some functions migrate to direct electric actuation, while others retain hydraulics and require more efficient pumps, motors and controls. The resulting opportunity depends on the complete machine duty cycle, available packaging space and the cost of meeting the required force or torque profile.

The commercial cycle also differs by channel and region. OEM purchasing responds to machine production plans and inventory decisions, while replacement demand follows utilisation, equipment age and maintenance practice. Regional service capacity and application knowledge consequently influence supplier performance alongside manufacturing cost and product specifications.

Growth drivers

Infrastructure equipment demand

Excavators, loaders, cranes and road-building machinery require hydraulic power for high-force work functions and demanding duty cycles. Equipment purchases and fleet renewal translate into demand for pumps and motors through OEM production schedules. Suppliers with strong platform positions benefit from both initial machine assembly and subsequent component replacement.

Electrohydraulic efficiency upgrades

Electrified machinery makes hydraulic losses more visible because every avoidable loss reduces operating time between charging events. Variable displacement, electronically managed flow and matched pump-drive combinations help equipment manufacturers improve energy use without abandoning hydraulic power density. This supports higher component value where suppliers can demonstrate efficiency across the actual machine duty cycle.

Precision industrial motion

Presses, forming equipment, plastics machinery and heavy manufacturing systems demand repeatable force and controlled motion. Pump and motor suppliers gain value through stable low-speed operation, reduced leakage and integration with machine controls. The strongest opportunities arise where production quality and uptime justify premium component specifications.

Agricultural mechanisation

© shev.io — All rights reserved.

Higher-capability tractors, harvesters and self-propelled agricultural machines expand the number and sophistication of hydraulic functions. Demand is supported by labour availability, larger work implements and the need to complete operations within narrow seasonal windows. Manufacturers that balance ruggedness, serviceability and cost are well positioned in emerging-market equipment programmes.

Replacement demand and uptime

The installed machinery base generates recurring demand as pumps and motors wear, fail or become uneconomic to repair. Contamination, thermal stress and demanding operating conditions make component availability a purchasing priority for fleet owners and industrial plants. Suppliers with application knowledge and dependable local inventories can capture replacement demand even when new-equipment orders soften.

Local supply and engineering

Equipment manufacturers increasingly value suppliers that can support local qualification, engineering changes and production continuity. Regional manufacturing and application centres shorten response times and improve the fit between component specifications and local operating conditions. This creates opportunities for established global suppliers and technically capable regional manufacturers.

Restraints

Electromechanical substitution

Electric actuators and direct electric drives compete with fluid power where loads, packaging and duty cycles favour simpler distributed motion. Substitution is strongest where equipment designers prioritise precise position control and removal of hydraulic circuits. Pump and motor suppliers face pressure to demonstrate a system-level advantage in force density, durability or operating cost.

Equipment-cycle volatility

Construction, agricultural and industrial machinery orders respond to financing costs, customer utilisation and capital budgets. OEM inventory reductions can temporarily depress component purchases more sharply than underlying machine use. Suppliers with broad end-market exposure and meaningful replacement sales are better placed to manage these fluctuations.

Precision production costs

High-performance pumps and motors require tight tolerances, specialised machining, effective sealing and consistent materials quality. Cost increases in castings, bearings and precision manufacturing can compress margins when OEM contracts delay price recovery. Qualification requirements also limit the speed at which manufacturers can replace critical suppliers.

Leakage and energy scrutiny

Hydraulic leakage, noise and thermal losses increase the engineering burden in sensitive operating environments. Pneumatic motors face particular scrutiny where compressed-air generation creates a high

© shev.io — All rights reserved.

operating-energy cost. These issues increase demand for improved designs while restricting adoption in applications with attractive electric alternatives.

© shev.io — All rights reserved.

Fluid Power Pump and Motor Market Driver and Restraint Impact

Drivers — impact on forecast

Driver	Impact on CAGR	Geography	Horizon
Infrastructure equipment demand	XXX	XXX	XXX
Electrohydraulic efficiency upgrades	XXX	XXX	XXX
Precision industrial motion	XXX	XXX	XXX
Agricultural mechanisation	XXX	XXX	XXX
Replacement demand and uptime	XXX	XXX	XXX
Local supply and engineering	XXX	XXX	XXX

Source: XXX

Restraints — impact on forecast

Restraint	Impact on CAGR	Geography	Horizon
Electromechanical substitution	XXX	XXX	XXX
Equipment-cycle volatility	XXX	XXX	XXX
Precision production costs	XXX	XXX	XXX
Leakage and energy scrutiny	XXX	XXX	XXX

Source: XXX

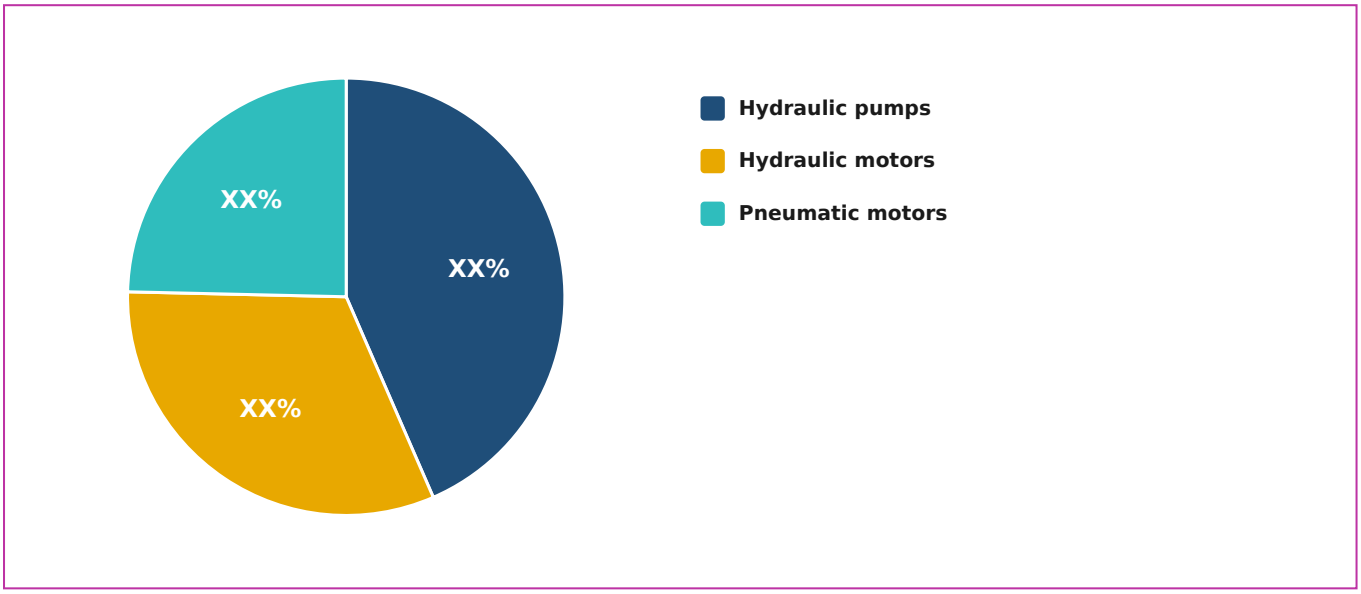
© shev.io — All rights reserved.

Fluid Power Pump and Motor Market Segmentation by Product, Mechanism and Application

By Product Type

Hydraulic pumps serve the energy-input function across a broad range of mobile and stationary systems, giving them the largest revenue base. Hydraulic motors are concentrated in traction, rotation and other demanding work functions. Pneumatic motors occupy specialised industrial applications where environmental suitability, compactness or operational characteristics support compressed-air drive. Hydraulic pumps have the strongest growth position as OEMs upgrade displacement control and electrohydraulic integration.

Value share by product Type, 2025



Source: XXX

Value by product Type, USD bn

Segment	2026	2027	2028	2029	2030	2031	Share 2025	CAGR
Hydraulic pumps	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Hydraulic motors	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Pneumatic motors	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX

Source: XXX

By Mechanism

Piston products lead by value because demanding pressure, efficiency and controllability requirements support higher component prices. Gear products retain a broad position in applications prioritising

© shev.io — All rights reserved.

durability, simplicity and acquisition cost, while vane products serve selected hydraulic and pneumatic applications. The piston category has the strongest growth outlook as advanced mobile platforms and industrial systems adopt more sophisticated fluid-power architectures. Mechanism classifications apply across the included pump and motor products without double counting.

Value by mechanism, USD bn

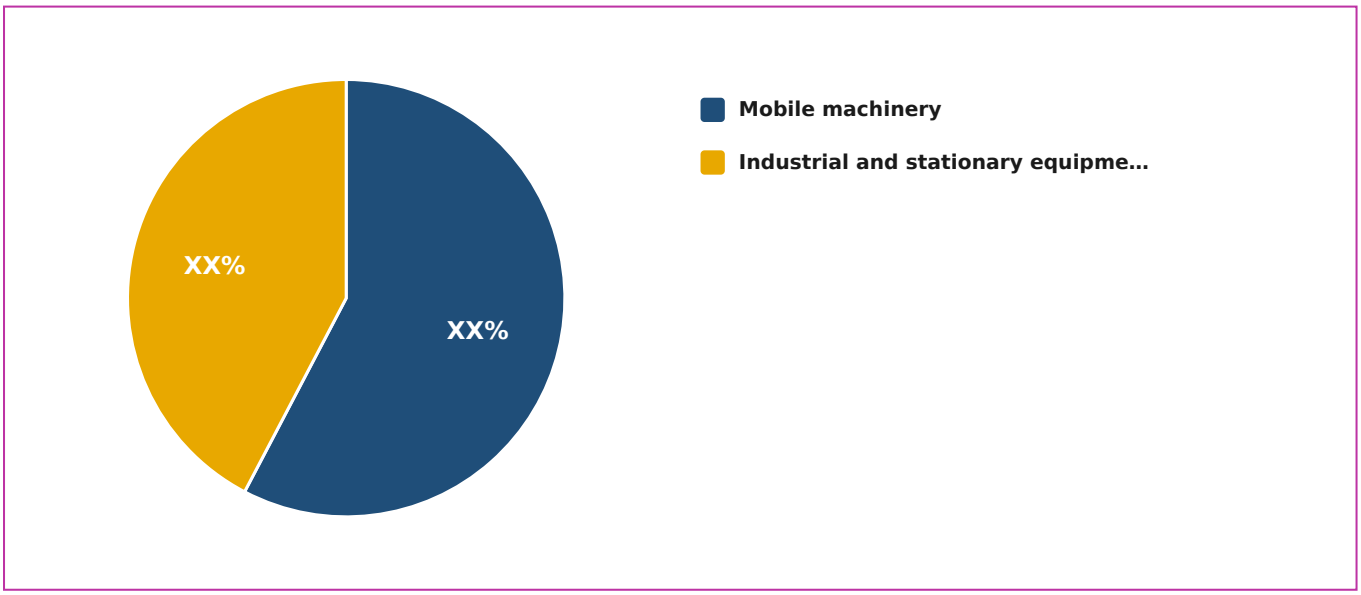
Segment	2026	2027	2028	2029	2030	2031	Share 2025	CAGR
Piston	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Gear	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Vane	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Other mechanisms	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX

Source: XXX

By Application

Mobile machinery leads through construction, agriculture, mining and material-handling equipment, where hydraulic power density remains commercially important. Industrial applications include manufacturing machinery and other stationary equipment requiring force, torque and controlled movement. Mobile applications offer the stronger growth opportunity as mechanisation and machine electrification drive new component specifications. Equipment function determines classification, so self-propelled machinery remains mobile even when operated within a factory.

Value share by application, 2025



Source: XXX

© shev.io — All rights reserved.

Value by application, USD bn

Segment	2026	2027	2028	2029	2030	2031	Share 2025	CAGR
Mobile machinery	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Industrial and stationary equipment	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX

Source: XXX

By Sales Channel

OEM demand dominates because pump and motor specifications are established during machine design and qualification. Replacement demand benefits from the installed base, high uptime requirements and the need for technically compatible components. The aftermarket provides the steadier growth opportunity during equipment downturns, while OEM sales respond more directly to production cycles. Sales are classified by final component use rather than whether a distributor participates in the transaction.

Value by sales Channel, USD bn

Segment	2026	2027	2028	2029	2030	2031	Share 2025	CAGR
OEM supply	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Aftermarket replacement	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX

Source: XXX

© shev.io — All rights reserved.

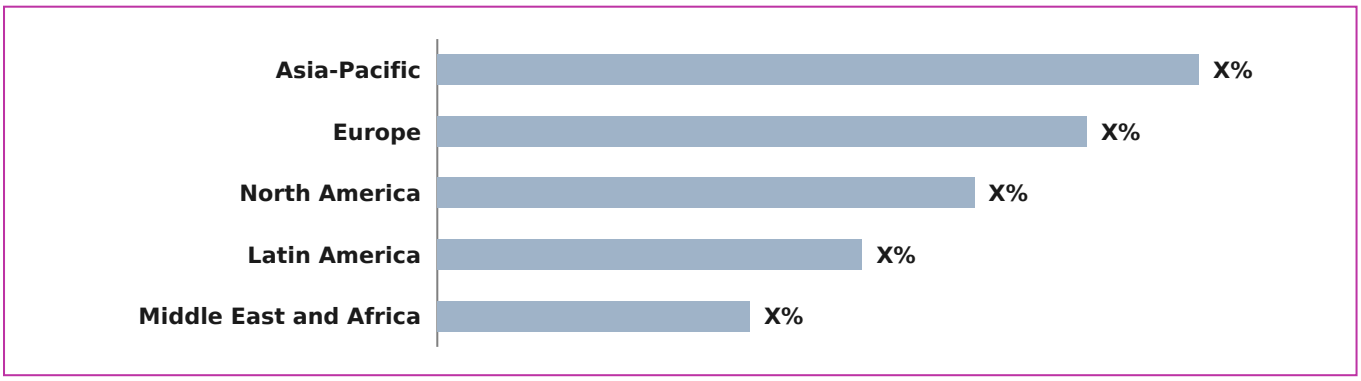
Fluid Power Pump and Motor Market Regional Analysis and Country Outlook

Asia-Pacific accounts for XX% of global revenue in 2025 and advances at a XX% CAGR through 2031. China anchors regional demand through construction machinery, industrial equipment and a substantial domestic component manufacturing base. Japan and South Korea contribute technically demanding equipment programmes, while India offers opportunities in infrastructure machinery, agricultural equipment and localised sourcing. Winning suppliers must combine competitive production costs with engineering support, product reliability and service coverage.

Europe holds XX% of market value, supported by premium industrial machinery, agricultural equipment and established hydraulic engineering capabilities. Germany and Italy are central to component supply and machinery integration, while France adds demand across industrial and mobile applications. North America represents XX% of the market, with the United States driving construction, industrial and replacement demand. Across both regions, efficiency, noise reduction and control integration carry greater commercial weight as OEMs redesign equipment platforms.

Latin America contributes XX% of revenue and grows at XX%, supported by agricultural and resource-related machinery, with Brazil forming the principal regional focus. The Middle East and Africa account for XX% and grow at XX%, combining infrastructure equipment demand with mining and other heavy-duty applications. Distribution reach, parts availability and compatibility with demanding operating conditions are particularly important in these markets. Mexico is included in North America throughout the study.

Growth rate by region, 2025-2031



Source: XXX

© shev.io — All rights reserved.

Market value by region, USD bn

Region	2026	2027	2028	2029	2030	2031	Share 2025	CAGR
Asia-Pacific	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Europe	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
North America	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Latin America	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Middle East and Africa	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX

Source: XXX

Market value by leading country, USD bn

Country	2025	2031	Share 2025	CAGR
United States	XXX	XXX	XXX	XXX
Germany	XXX	XXX	XXX	XXX
United Kingdom	XXX	XXX	XXX	XXX
Belgium	XXX	XXX	XXX	XXX
Netherlands	XXX	XXX	XXX	XXX
Japan	XXX	XXX	XXX	XXX
China	XXX	XXX	XXX	XXX
Mexico	XXX	XXX	XXX	XXX

Source: XXX

© shev.io — All rights reserved.

Fluid Power Pump and Motor Market Competitive Landscape and Company Share

The market has moderate concentration, with broad international suppliers competing against specialised manufacturers and regional producers. Bosch Rexroth, Danfoss and Parker Hannifin offer extensive hydraulic portfolios and application support. Kawasaki Heavy Industries, KYB, Bucher Hydraulics, HAWE Hydraulik and Linde Hydraulics have important positions in selected equipment categories and technical applications. Company-share analysis uses pump and motor revenue within the study boundary, preventing broader valve, cylinder, service and complete-system businesses from inflating supplier positions.

Portfolio ownership is material to competitive interpretation. Danfoss completed its acquisition of Eaton's hydraulics business in August 2021, while Interpump acquired White Drive in October 2021. Bosch Rexroth completed its acquisition of HydraForce in February 2023, extending its compact hydraulics and control offering. These transactions affect application access and system breadth; their entire acquired revenues do not automatically belong in the pump and motor market.

Competition increasingly centres on performance across the operating envelope, electronic compatibility and lifetime availability. Broad suppliers can coordinate pumps, motors and controls around an OEM platform, while specialists can win through compact packaging, low noise, particular pressure ranges or close engineering collaboration. For buyers and investors, the most useful comparisons distinguish technical capability, manufacturing footprint, channel access and in-scope revenue.

Leading companies

Company	HQ	Est. revenue 2025	Market share 2025	YoY
Bosch Rexroth	XXX	XXX	XXX	XXX
Danfoss	XXX	XXX	XXX	XXX
Parker Hannifin	XXX	XXX	XXX	XXX
Kawasaki Heavy Industries	XXX	XXX	XXX	XXX
KYB	XXX	XXX	XXX	XXX
Bucher Hydraulics	XXX	XXX	XXX	XXX
HAWE Hydraulik	XXX	XXX	XXX	XXX
Linde Hydraulics	XXX	XXX	XXX	XXX
HYDAC	XXX	XXX	XXX	XXX
Interpump Group	XXX	XXX	XXX	XXX

Source: XXX

© shev.io — All rights reserved.

Fluid Power Pump and Motor Market Forecast and Investment Opportunities

The market reaches USD XXX billion in 2031 as machinery demand, component replacement and specification upgrades expand the revenue pool. Hydraulic technology retains a strong role in applications requiring high force and power density under demanding operating conditions. Growth increasingly depends on reducing losses and improving controllability rather than simply raising rated output. Pneumatic motors remain a specialised opportunity where environmental suitability and operational characteristics support their use.

Electrification changes the design brief for fluid power suppliers. Successful products will match pump displacement, electric-drive behaviour and machine demand more closely, reducing unnecessary circulation and energy loss. Suppliers that demonstrate these benefits at machine level can defend premium pricing and improve their position during OEM platform redesigns. Products serving easily electrified motion functions face more direct substitution pressure.

Investment priorities favour application engineering, efficient component architectures, regional service capability and disciplined manufacturing expansion. The report's scenario framework varies machinery production, replacement intensity, component pricing and substitution rates separately, making the commercial consequences visible. Attractive acquisition targets combine defensible technical niches with accessible OEM relationships and an installed base that supports replacement demand.

Opportunities

- Variable-displacement pumps designed for battery-powered mobile machinery
- Compact integrated pump and electric-drive assemblies with separately identifiable component economics
- High-efficiency piston motors for demanding traction and work functions
- Condition-monitoring-enabled replacement programmes
- Localised OEM supply and service coverage in India and Southeast Asia
- Low-noise hydraulic components for indoor and urban equipment
- Pneumatic motors engineered for hazardous and washdown environments
- Application-specific products compatible with approved environmentally acceptable hydraulic fluids

> This preview shows the form and depth of the report. The full report contains every figure, segment- and country-level detail and full company profiles. On purchase all figures are finalised and verified, and the report is delivered within 24–72 hours.

© shev.io — All rights reserved.