



Pump Market
Research & Analysis
UK 2012

REPORT SAMPLE

**Pump Market Size & Industry Review 2006-2012; SWOT & PEST Analysis,
Product Mix & Key Trends 2006-2016; Pump Suppliers Profiles & Key Financials;
Market Forecasts to 2016**

1st Edition

February 2012

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This report reflects MTW Research's independent view of the market which may differ from other third party views. Whilst we try to ensure that our reports are an accurate depiction of their respective markets, it must be emphasised that the figures and comment contained therein are estimates based on a mix of primary and secondary research, and should therefore be treated as such.

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1. Introduction to *Research & Analysis* Reports

1.1 Key Features & Benefits of this *Research & Analysis* Report

MTW's "*Research & Analysis*" market reports provide an independent, comprehensive review of recent, current and future market size and trends in an easy to reference format. Each report provides vital market intelligence in terms of size, product mix, SWOT, key trends, end use sector mix & trends, key market influences and future prospects for the market. In addition, rankings by turnover, profit and other key financials for the market leaders are provided as well as a 1 page profile for each key player in the market. Contact, telemarketing & mailing details are also provided for each company to enable the reader to quickly develop sales leads.

Based on statistically relevant company sales returns which provide higher confidence levels and researched by market research professionals with experience in the industry, MTW's *Research and Analysis* reports are used as a foundation for coherent strategic decision making based on sound market intelligence and for developing effective marketing plans. MTW reports can also be used as an operational sales and marketing tool by identifying market leaders, enabling the reader to quickly grow sales to new clients and focus marketing budgets.

This report includes:-

- **Market Size, PEST, SWOT & Trends – Historical, Current & Future**

Based on sales data from a representative proportion of the industry, this report provides market size by value over a ten-year period. As they are based on quantitative data as well as qualitative input from the industry, our reports are more accurate than other qualitative based reports and offer better value for money. By combining the best of both quantitative and qualitative input, we offer our clients greater confidence in our market forecasts as well as discussing key market trends and influences from a qualitative perspective.

- **Product & End Use Sector Mix – Current & Future**

This report identifies the key product sectors & end use applications in the market and provides historical, current and forecast market share estimates for each, alongside qualitative discussion on key trends for each segment of the industry. With input for this report being both qualitative and quantitative we are able to offer an effective insight into the core components of the market, as well as forecasting future market shares.

- **Industry Structure Analysis**

The report identifies the key characteristics of the structure of the industry, analysed by turnover bands, credit rating, performance over the last 12 months, age of companies, employee bands and geographical share by UK region. This analysis enables the reader to identify the key driving forces behind current market demand and adapt business tactics accordingly. Based on quantitative, statistically valid research, the reader is able to undertake strategic decisions with greater confidence as well as basing marketing strategies on solid market intelligence.

- **Market Leaders Ranking**

This report identifies the key players in the market and ranks them by a number of criteria, including turnover and profitability. This enables the reader to identify the most relevant potential key customers in a market, understand their current position in the market and quickly identify new targets. Also, MTW provide a turnover estimate for every company included in the report, enabling the reader to develop market share estimates.

- **Company Profiles & Sales Leads**

This report includes a 1 page company profile including contact details for developing fast sales leads; 4 years of the most recent key financial indicators; and MTW's '*at a glance*' chart, enabling the reader to quickly gauge the current and historical financial health of a competitor or potential client.

- **Relevant Research, Saving You Time**

MTW Research have been researching and writing market reports in these sectors since 1999 and as such we are able to develop a company listing which is more relevant to the market, rather than automatically selecting companies to be included by industry code. Our reports represent excellent value for money and don't bombard you with irrelevant financial data; they are designed to enable you to engage in fast and effective market analysis. We focus on providing what's important in an easy to reference and use format.

2. UK PUMP MARKET 2006-2016

2.1 EXECUTIVE SUMMARY & MARKET OVERVIEW

The UK Pump Market is defined as consisting of a wide range of pumps for use in domestic and non-domestic new build & RMI (repair, maintenance & improvement) markets. Specifically, this report reviews the UK pump market sales between 2006 and 2012 with forecasts to 2016 segmented by Rotodynamic, Reciprocating Positive Displacement & Rotary Positive Displacement. More specifically, pumps within the definition of the 'market' include:-

- **Rotodynamic (Single Stage Vertical)** – in-line close coupled; in-line; glandless submerged motor; axial flow; mixed flow; mixed flow-volute; concrete volute; process, double entry; hot water circulator; borehole shaft driven; reactor; sump pump; barrel emptying; solids handling; sludge pump; borehole; cellar; sewage; contractor; aquarium; fountain; bilge.
- **Rotodynamic (Single Stage Horizontal)** - close coupled, self priming; end suction back pullout; glandless magnetic drive; double entry; glandless-submerged motor; mixed flow; axial flow; solids handling; chemical pump; process; shower pump; sludge pump; abrasive handling; vortex pump; regenerative; side channel; hygienic; swimming pool.
- **Rotodynamic (Multi-Stage)** - radially split; barrel insert; axially split; sump; caisson; borehole shaft driven pump.
- **Positive Displacement (Rotary)** - internal / external gear; flexible vane; lobe; sliding vane; orbital lobe; screw pump; archimedian screw; helical rotor; peristaltic; rotary diaphragm.
- **Positive Displacement (Reciprocating)** – Diaphragm single/double acting; piston; plunger; ram; diaphragm oil free.

All prices in this report are measured at pump manufacturers selling prices (msp) excluding any value added, import or other taxes and delivery charges. The market definition specifically excludes sales of used parts, labour charges for repair etc., and focuses only on new products supplied for use within the United Kingdom. The methodology for this report is based on the last 4 years of financial data from the industry, coupled with a wide range of secondary sources from websites, Companies House, HM Government, HM Customs & Excise, trade journals, credit reference agencies, industry commentators and our own experience of researching this market for more than a decade.

Following an improved market performance in **redacted**, indications are that **redacted** experienced a **redacted** in **redacted** and **redacted redacted** build and **redacted** activity which has **redacted** impacted the pump market to some extent, though **redacted** remains **redacted** in current price terms at around **redacted** %. This **redacted** was more pronounced during H2 2011 and prospects for 2012 are for **redacted redacted** trading conditions in the first half of the year. However, whilst there remains significant debate as to **redacted redacted redacted** return to

growth, our forecasts are for a **redacted redacted** market in H2 2012 as the UK **redacted redacted** markets continue a track of **redacted redacted**.

The largest sector of the market is accounted for by the **redacted** or **redacted** sector accounting for just over **redacted** of pump suppliers sales in 2012, reflecting a value of almost **£redacted** million. Sources indicate that this sector has experienced continued share **redacted** in terms of value in recent years, having **redacted** by some 5% since the sector **redacted** in 2009.

The second largest sector sold by UK pump suppliers is the **redacted** market, with sales of these products estimated to reach just over **£redacted** million or **redacted** % of the overall market by year end December 2012. **redacted** pumps also continue to represent a **redacted** share of the market in 2012, with just under a **redacted** of pump sales attributed to this sector. Whilst **redacted** may have **redacted** to some extent for these products in recent years, around **£redacted** million of sales per year is indicated to be derived from this sector.

redacted % of pump suppliers have experienced rapid growth in turnover in the last 12 months with a further **redacted** % of companies reporting growth of between 1-10% over the same period. However, the **redacted** continues to linger with **redacted** % of the industry reported to have experienced some **redacted** in sales in the last 12 months, with a further **redacted** % experiencing a **redacted** in sales of more than **redacted** %. **redacted** % of pump suppliers are currently regarded as having either a 'good' or 'excellent' credit rating with a further **redacted** % of pump suppliers now regarded as having a 'fair' credit rating, reflecting the fact that most companies active in the industry have strong balance sheets, healthy levels of liquidity and profitability.

The UK pump industry benefits from a wide ranging target market in terms of end use application sectors and this represents a key strength for the market. In terms of some of the larger key end use sectors, the **redacted redacted** sector continues to represent significant opportunities, with **redacted** also contributing to market optimism. Continued growth through the economic downturn in the **redacted** industry has also sustained growth opportunities for pump suppliers across a wide range of sectors in the pump market. In contrast, whilst still significant, the **redacted** market is indicated to have suffered from a rapid contraction in demand in recent years as both **redacted redacted** activity in these sectors has declined as a result of **redacted redacted**. Whilst these sectors **redacted** to represent **redacted redacted** term **redacted**, short term **redacted** for these markets are **redacted redacted**.

Overall the UK pump market is forecast to follow a **redacted redacted** track of **redacted** in the near term, with current **redacted** of **redacted** % per annum highlighting the continued **redacted** of **redacted** in the market and within the majority of end use sectors. **redacted**, by late 2012 / early 2013 our forecasts are for a **redacted redacted**, or **redacted redacted redacted** levels reflecting a more **redacted** trading environment and **redacted redacted** from a number of key end use application sectors. The market is **redacted** to **redacted** further in the **redacted** to **redacted** term, **redacted** by a number of political, environmental, technological and economic influences, reaching just under **£redacted** million by year end December 2016 – a **redacted** of around **redacted** % in the next 5 years.

2.2 PUMP MARKET SIZE & TRENDS 2006-2016

2.2.1 Pump Market Size 2006-2016 – Current Prices

The UK pump market encompasses a wide range of products and is estimated to be worth just over £**redacted** million in 2012 as illustrated in the following chart:-

Figure 1: Pump Market – UK 2006-2016 By Value £m

redacted

Source: MTW Research / Trade Estimates

The UK pump market is currently valued at just over £**redacted** million in 2012 at manufacturers selling prices, reflecting a **redacted redacted** in terms of **redacted** sales **redacted** following **redacted redacted** 2010 and 2011, though the market **redacted** to **redacted** at around **redacted** % per annum.

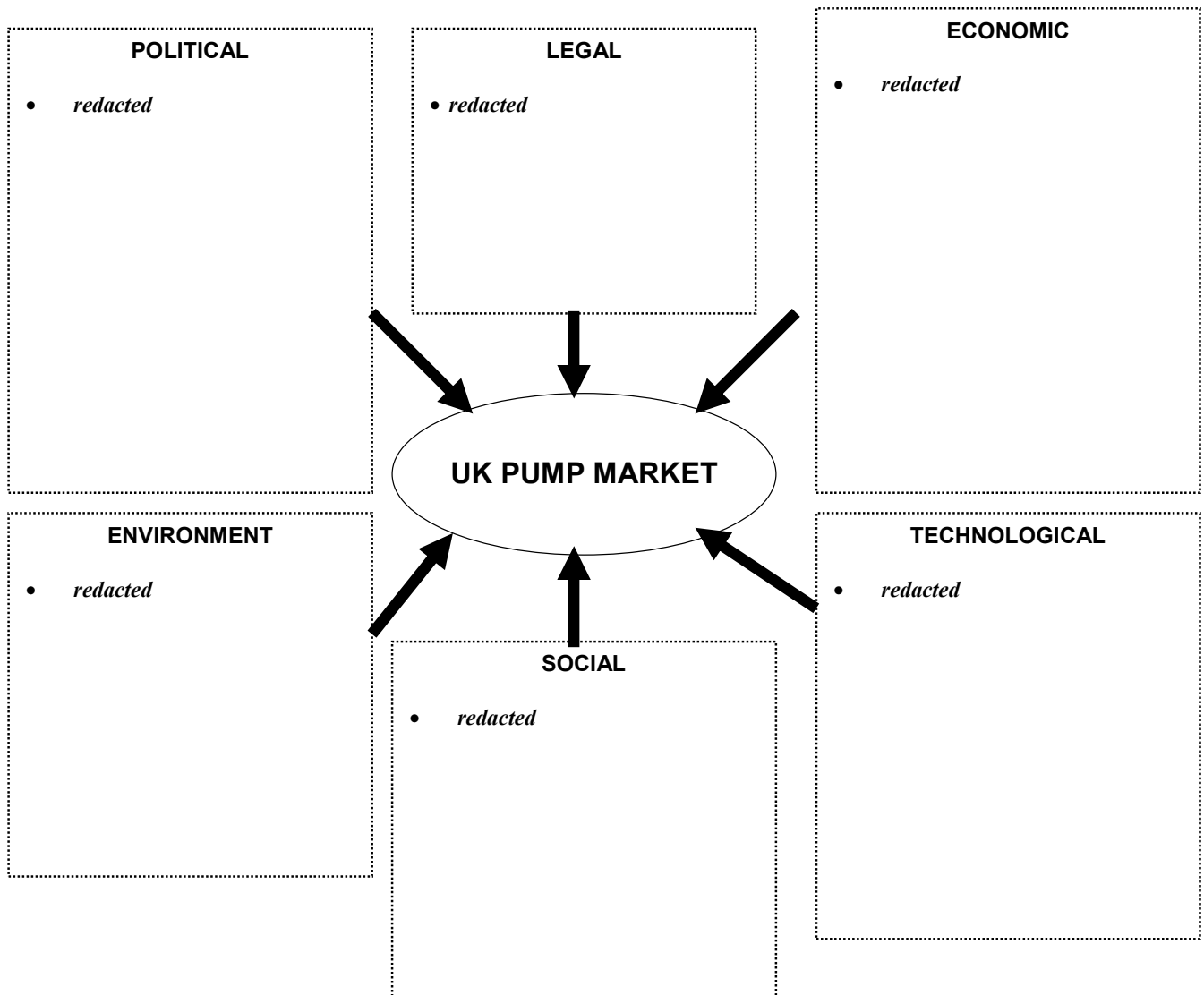
The

2.3 KEY MARKET TRENDS IN THE UK PUMP MARKET

2.3.1 PEST Analysis – Illustration of Key Market Forces

There are a large number of macro market issues and trends which directly or indirectly influence the UK Pump market. These issues typically relate to political, legal, economic, environmental, social and technological factors. The following diagram provides a brief overview of some of these key issues which are currently impacting the market at present and those which may stimulate or dampen market growth in the future:-

Figure 5: PEST Analysis for UK Pump Market in 2012



Source: MTW Research Strategic Review 2012

Whilst the above diagram is by no means exhaustive, it provides an illustration of some of the key issues impacting the market at present and in the future.

2.3.2 Political & Legal Influences & Trends

The current UK

2.4 SWOT ANALYSIS – Strengths, Weaknesses, Opportunities, Threats

Following a strategic review of the pump market, the following table identifies some of the key strengths & weaknesses evident in the market at present:-

Figure 10: Key Strengths & Weaknesses in the Pump Market 2012-2016

STRENGTHS	WEAKNESSES
• <i>redacted</i>	• <i>redacted</i>

Source: MTW Research Strategic Review 2012

Key opportunities and threats evident in the market at present include:-

Figure 11: Key Opportunities & Threats in the Pump Market 2012-2016

OPPORTUNITIES	THREATS
<ul style="list-style-type: none">• <i>redacted</i>	<ul style="list-style-type: none">• <i>redacted</i>

Source: MTW Research Strategic Review 2012

3. PRODUCT TRENDS & SHARES

3.1 Share by Key Product Sector – 2012, 2006 & 2016

The share accounted for by each of the key product sectors within the UK pump market in 2012 is illustrated in the following chart:-

Figure 12: Share by Product in Pump Market 2012

redacted

Source: MTW Research / Trade Sources

The UK pump market comprises of a wide range of products which can be segmented into 3 relatively distinct categories:-

- **Rotodynamic** (Single / Multi Stage Horizontal & Vertical)
- **Positive Displacement** (Reciprocating)
- **Positive Displacement** (Rotary)

As illustrated above, rotodynamic pumps are currently estimated to account for around *redacted* % of the UK pumps market in 2012, reflecting sales of around *£redacted* million at manufacturers selling prices. There are a wide range of products within this sector and a large number of applications within the commercial, public, industrial and domestic markets. Products within this market cover the *redacted redacted* from *redacted redacted* sectors such as *redacted redacted* pumps through to *redacted* such as *redacted* pumps.

Whilst sales account for

3.2 Rotodynamic Pump Market Size & Trends 2006-2016

The following chart illustrates the performance of the rotodynamic pumps market sold by UK pump manufacturers since 2006 and forecasts to 2016:-

Figure 15: Rotodynamic Pump Market by Value 2006-2012 £M

redacted

Source: MTW Research / Trade Estimates

The rotodynamic pumps market incorporates a particularly wide range of products for myriad applications across all of the UK pump industry's target markets. In volume terms, the sector accounts for around *redacted* % of all sales with the sector contributing just *redacted redacted* total sales value to the industry. The definition for this market includes the following key product sectors:-

- **Rotodynamic (Single Stage Vertical)** – in-line close coupled; in-line; glandless submerged motor; axial flow; mixed flow; mixed flow-volute; concrete volute; process, double entry; hot water circulator; borehole shaft driven; reactor; sump pump; barrel emptying; solids handling; sludge pump; borehole; cellar; sewage; contractor; aquarium; fountain; bilge.
- **Rotodynamic (Single Stage Horizontal)** - close coupled, self priming; end suction back pullout; glandless magnetic drive; double entry; glandless-submerged motor; mixed flow; axial flow; solids handling; chemical pump; process; shower pump; sludge pump; abrasive handling; vortex pump; regenerative; side channel; hygienic; swimming pool.
- **Rotodynamic (Multi-Stage)** - radially split; barrel insert; axially split; sump; caisson; borehole shaft driven pump.

Whilst the above list seeks to include the majority of the major product sectors within the UK rotodynamic pumps market, it should be noted that it is not necessarily exhaustive.

Sales of the above products are

In terms of future prospects, the following chart illustrates our forecasts of the market in terms of value to 2016:-

Figure 16: Rotodynamic Pump Market by Value 2012-2016 £M

redacted

Source: MTW Research / Trade Estimates

As the chart illustrates, prospects for the rotodynamic sector are

3.3 Rotary Positive Displacement Pump Market 2006 – 2016

The following chart illustrates sales of rotary positive displacement pumps sold in the UK since 2006 and forecasts to 2016:-

Figure 17: Rotary Positive Displacement Pump Market by Value 2006-2012 £M

redacted

Source: MTW Research / Trade Estimates

Rotary positive displacement pumps work on a relatively simple principle whereby liquid is drawn into the pump through a vacuum which is generated by gear or element rotation. The liquid volume is then reduced by the pump geometry and elements and forced out of the pump. Smooth, continuous flow rates are relatively unaffected by differential pressure and temperature and tight clearances generally minimise the amount of liquid that can return from discharge to suction side of the pump and as such are particularly efficient. The sector is currently valued at around £*redacted* million in 2012, representing approximately *redacted* % of the total UK pump industry in value terms.

redacted redacted as *redacted redacted* as the rotodynamic sector, there are a wide range of products and applications within the rotary PD sector, including:-

- Internal / external gear;
- Flexible vane
- Twin / triple / multi lobe
- Sliding vane
- Orbital lobe
- Screw pump
- Archimedian screw
- Helical rotor
- Peristaltic
- Rotary diaphragm

As previously discussed, rotary positive displacement pumps are typically used in applications where factors such as viscosity, pressure, temperature and flow may vary which could significantly impact the operational efficiency of a rotodynamic pump. The rotary sector has a number of key inherent product benefits which has sustained sales in recent years, including:-

- Can pump *redacted redacted*

- *redacted*
- *redacted*
- *redacted*
- *redacted*
- *redacted*
- *redacted*

Rotary PD pumps

The following chart illustrates our forecasts for the rotary positive displacement pump sector to 2016:-

Figure 18: Rotary Positive Displacement Pump Market by Value 2012-2016 £M

redacted

Source: MTW Research / Trade Estimates

As illustrated, forecasts for year end December 2012 are for rotary pumps to

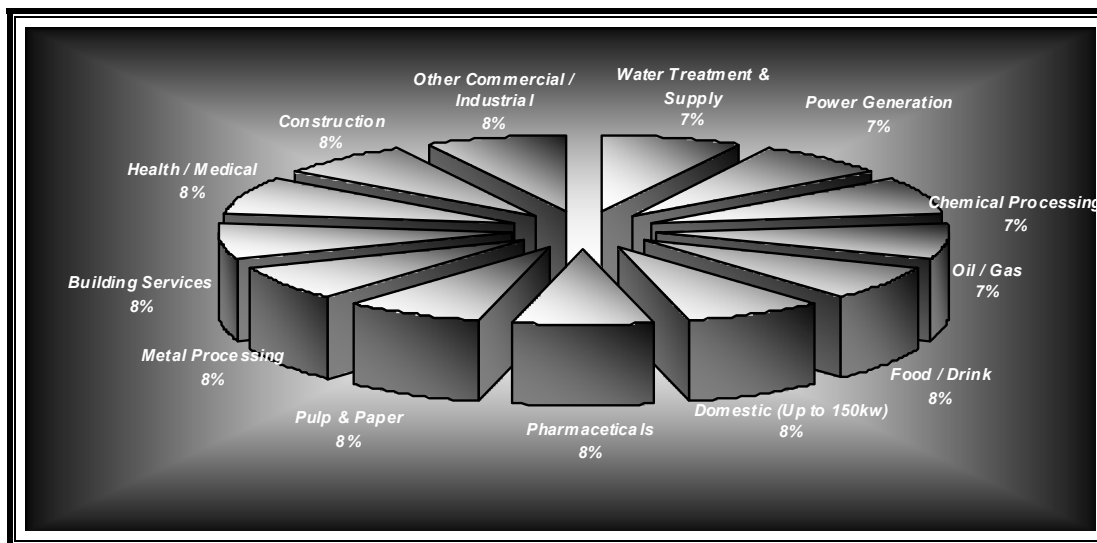
4. End Use Markets & Trends for UK Pump Industry 2012-2016

4.1 Share by End Use Application – UK Pumps 2006-2016

As has previously been discussed, there are a particularly wide range of products in the UK pump industry utilising various technologies from rotodynamic to positive displacement. Given the relative maturity of the UK pump industry, both **redacted** and **redacted** development are indicated to offer some **redacted** for **redacted redacted** in the **redacted** to **redacted** term, with **redacted** increasingly **redacted** to **redacted** and **redacted** the **redacted** of **redacted redacted** market **redacted** .

As a result of ongoing **redacted** and **redacted redacted** , the scope of the UK pump industry in terms of applications **redacted redacted**. Given the **redacted redacted** of **redacted redacted** and **redacted** from manufacturers, **redacted**. **redacted** , the following chart illustrates our estimates of the share accounted for by each of the key end use application sectors in 2012:-

Figure 21: UK Pump Market Share by Key End Use Sector 2012 (Figures Altered for Sample)

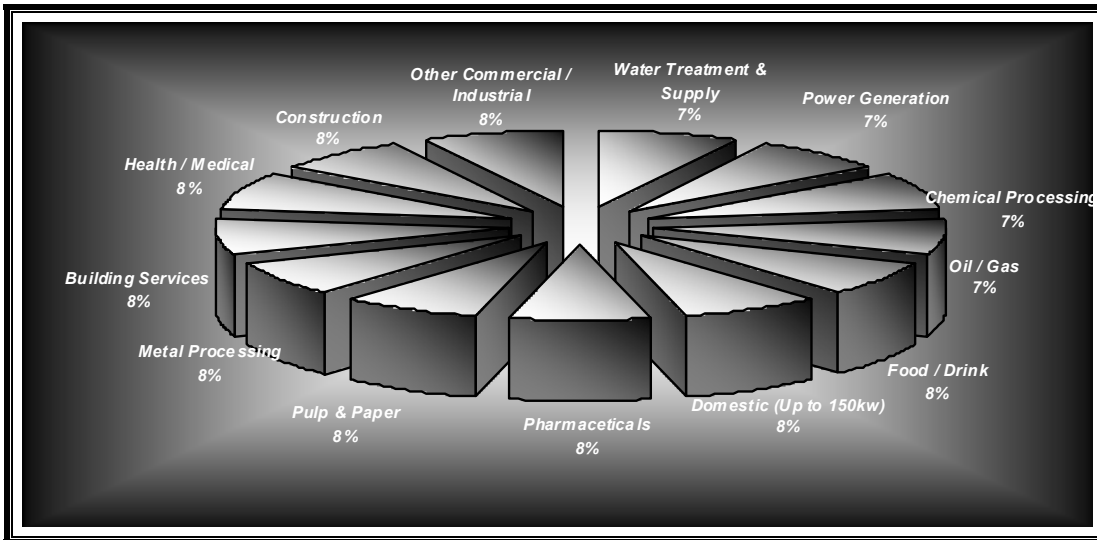


Source: MTW Research /Trade Sources

As the chart illustrates, the UK pump industry is

In order to illustrate the performance of each of the key application sectors in recent years, the following chart illustrates our estimates of the share by end use sector in 2006:-

Figure 22: UK Pump Market Share by Key End Use Sector 2012 (Figures Altered for Sample)

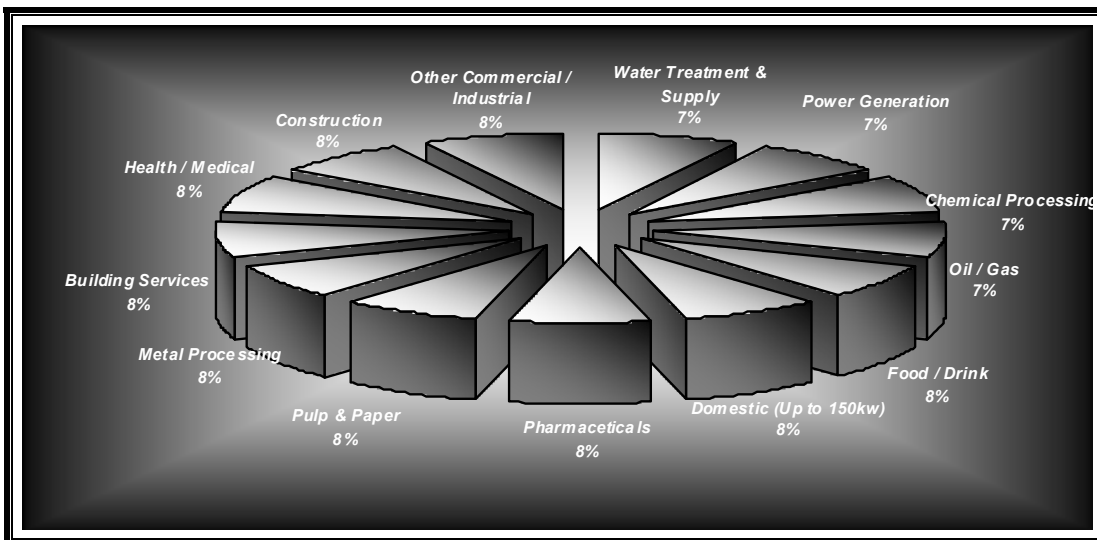


Source: MTW Research /Trade Sources

As illustrated, there has been

The following chart illustrates our forecasts of the likely share by key end use sector in 2016:-

Figure 23: UK Pump Market Share by Key End Use Sector 2016 (Figures Altered for Sample)



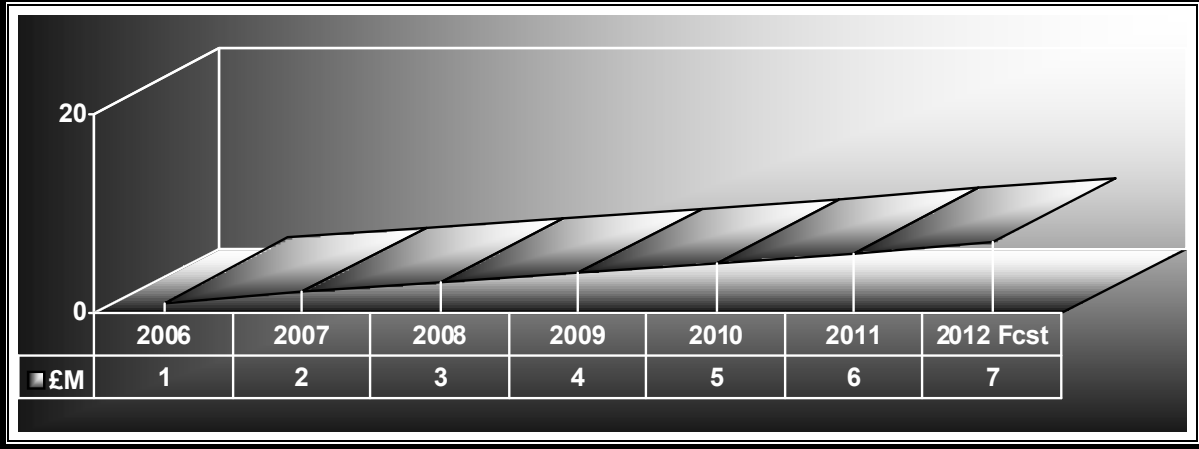
Source: MTW Research /Trade Sources

Given a

4.2 Water Treatment & Supply Sector - Pump Sales & Trends 2006-2016

The following chart illustrates the performance of the UK pump market in the water treatment and supply sector since 2006 with forecasts to 2012:-

Figure 24: Pump Sales to Water Treatment & Supply Market by Value 2006-2016 £M (Figures Altered)

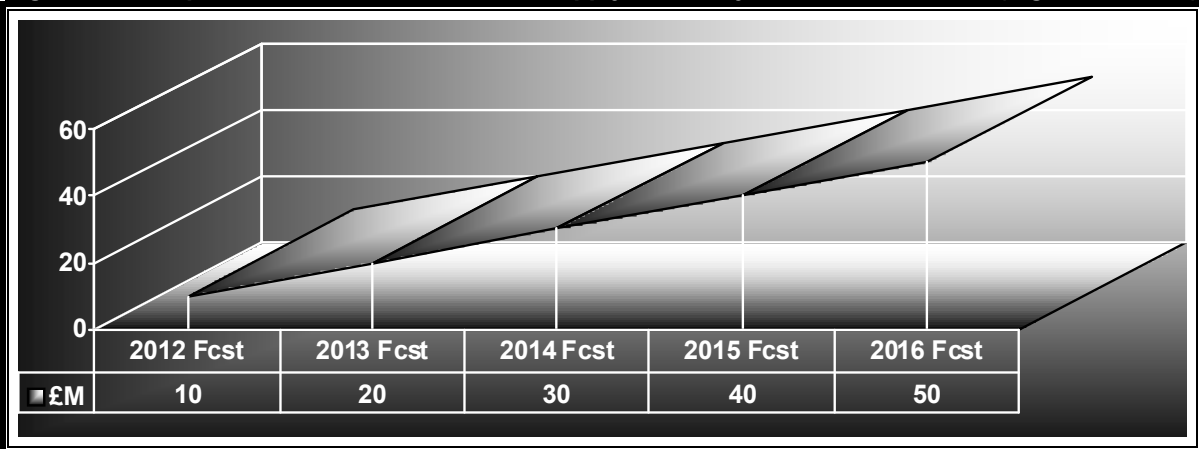


Source: MTW Research / Trade Estimates – Figures altered for Sample

The above chart illustrates the

The following chart illustrates the forecasts of the UK pump market in the water treatment and supply sector since to 2016:-

Figure 25: Pump Sales to Water Treatment & Supply Market by Value 2012-2016 £M (Figures Altered)



Source: MTW Research / Trade Estimates – Figures Altered for Sample

In 2010 DEFRA published

5. PUMP SUPPLIERS PROFILES

The following section identifies some of the key UK pump suppliers and provides a 1 page profile with key performance indicators for each. It should be noted that whilst we endeavour to include all the major players, inclusion or otherwise in the following section does not necessarily indicate a company's relevance in the market.

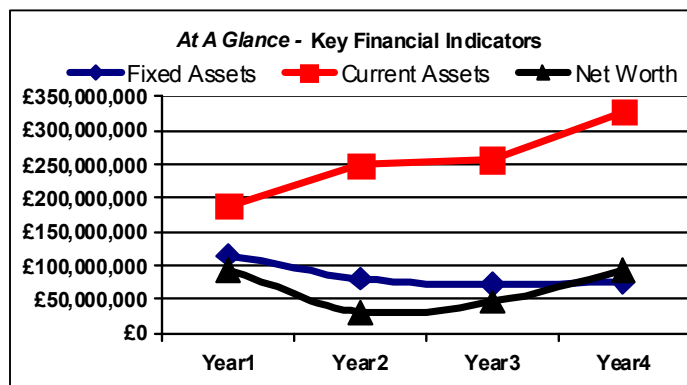
5.1 Pump Suppliers Profiles & KPIs

Sample Limited - Company Overview & 'At a Glance'

Sample House
Sample Drive,
Postcode
Tel: Sample

Sample is a private limited with share capital company, incorporated on 1 June 1999. The company's main activities are recorded by Companies House as "Pump manufacturer and engineering." In 2012, the company has an estimated 1800-1850 employees. To year end December 2011, Sample is estimated to have achieved a turnover of around £500

million. Pre-tax profit for the same period is estimated at around £16 million. The following table briefly provides a top line overview on Sample:-



Company Name	Sample Limited
Brief Description of Activities	Sample
Parent Company	Sample
Ultimate Holding Company	Sample
Estimated Number of Employees	1800-1850
Senior Decision Maker / Director	Sample

The following table illustrates the company's key performance indicators for the last 4 years:-

Sample Limited - 4 Year KPIs to Year End 31/12/2010

Key Indicator £	Year End 31/12/2007 (Year1)	Year End 31/12/2008 (Year2)	Year End 31/12/2009 (Year3)	Year End 31/12/2010 (Year4)
Fixed Assets	£115,783,000	£80,586,000	£71,899,000	£77,151,000
Current Assets	£188,819,000	£248,516,000	£255,934,000	£327,929,000
Current Liabilities	£122,748,000	£157,183,000	£161,282,000	£202,560,000
Long Term Liabilities	£19,543,000	£78,933,000	£68,340,000	£68,347,000
Net Worth	£94,017,000	£32,012,000	£46,730,000	£92,505,000
Working Capital	£66,071,000	£91,333,000	£94,652,000	£125,369,000
Profit per Employee	£8,373	£15,210	£6,283	£8,477
Sales per Employee	£201,784	£237,433	£235,742	£263,578

6. Pump Manufacturers Industry Trends 2006-2016

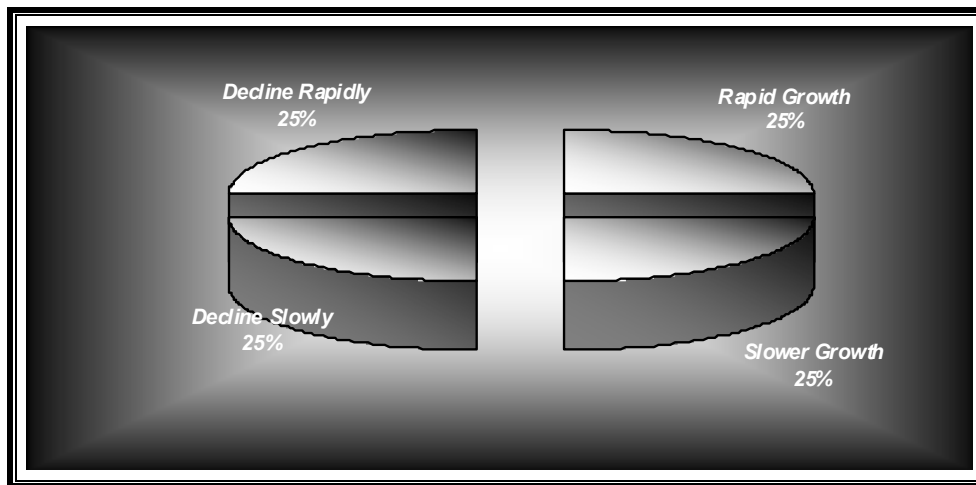
5.1 Pump Suppliers Market – Industry Structure

The following section reviews the pump suppliers market in 2012 in terms of industry structure based on industry financial sales data and provides key performance indicators for the UK pump suppliers market.

5.2.1 Market Mix by Growth/Decline Over Last 12 Months

The following chart illustrates the share accounted for by the number of companies reporting either a rise, contraction or static sales during the last 12 months:-

Figure 100: Market Share by Pump Suppliers Sales Growth / Decline 2012



Source: MTW Research / Company Accounts – Figures altered in sample

According to industry sales, **redacted**% of pump suppliers have experienced rapid growth in turnover in the last 12 months to February 2012, defined as growth in excess of 10%. In addition, a further **redacted**% of companies have reported growth of between 1-10% over the same period suggesting that almost **redacted**% of the industry is **redacted redacted** in terms of overall sales.

However, the **redacted redacted redacted** in a number of key end use sectors **redacted**, there remain

5.2.2 Industry Share by Credit Rating in 2012

Credit ratings also provide a crucial indicator as to an organisation's performance and underlying health. When combined with other companies and viewed on an industry wide basis, credit ratings also offer an effective insight into the fundamentals of a market. The following chart illustrates the share accounted for by pump suppliers in terms of credit rating in February 2012:-

Figure 102: Market Share by Credit Rating in the Pump Suppliers Industry 2012

Redacted

Source: MTW Research / Company Accounts

Credit ratings are a crucial indicator of the financial health of a company and when combined, as in the above chart, provide a graphic illustration of the current financial health of the overall market at present.

As of February 2012,

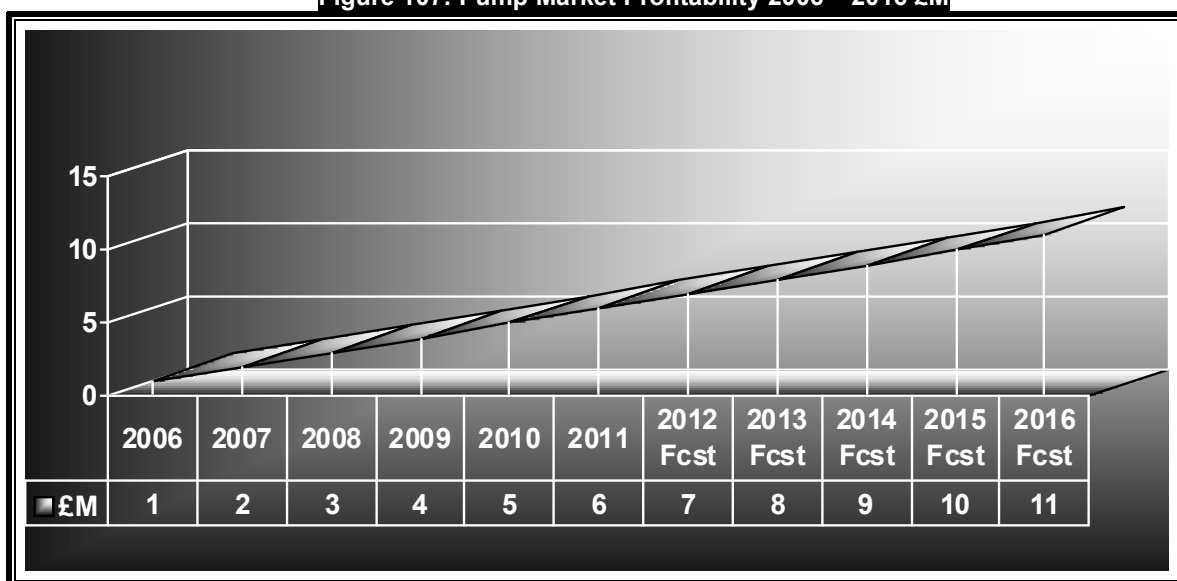
5.3 Key Market Trends in the UK Pump Industry 2006-2016

The following section reviews some of the key trends in terms of financial performance of the UK pump suppliers market since 2006 and forecasts to 2016.

5.3.1 Pump Market Profitability 2006-2016

The following table illustrates the performance of the pump market in terms of profitability between 2006 and 2012 and provides forecasts to 2016:-

Figure 107: Pump Market Profitability 2006 – 2016 £M



Source: MTW Research / Trade Estimates – Figures Altered for Sample

Profitability levels in the pump market peaked in

5.4 Pump Suppliers Ranking & Turnover Estimates

5.4.1 Pump Suppliers Listing

The following identifies key market players active at present:-

Figure 115: Pump Suppliers Company Listing

ABB	Darwins Holdings	Multitrode UK
Ace Cranfield	Flotronic Pumps	Munster Simms Engineering
Advanced Energy Monitoring Systems	Flowserve GB	Obart Pumps
Aespump	Greene Tweed & Co	Precision Polymer Engineering
Aesseal Plc	Grundfos Pumps	Pumps (UK)
Albany Engineering Company	Hardide Coatings	Ram Pumps
Alfa Laval	Hidrostal	Smedegaard Pumps
Armstrong Integrated	HMD Sealless Pumps	Spx Flow Technology
Atlas Copco	Industrial Trading Solutions Ltd	Stuart Turner
Axflow	ITT Industries	Sulzer Pumps (UK)
Brook Crompton UK	ITT Water & Wastewater Projects	T-T Pumps
Calpeda	John Crane UK	Tuthill U.K.
Caprari Pumps (U.K.)	KSB	Watson-Marlow
Cat Pumps (U.K.)	Leroy Somer	Weg Electric Motors (Uk)
Chemquip	LFH Engineering	Weir Minerals Europe
Circulating Pumps	Lowara UK	Wilo (U.K.) Ltd
Crest Pumps	MDM Pumps Ltd.	Wright Flow Technologies
	Mono Pumps	

Source: MTW Research / Trade Sources

The following section ranks the companies identified above by various key financial indicators. It should be noted that each company will have varying degrees of activity within this sector and will include an element of variation in terms of product and service portfolio. Whilst we endeavour to include all relevant companies, there may be some that are not included in this list for a number of reasons and as such the following should not be regarded as an exhaustive directory of UK pump suppliers.

Where possible, we have used the financial information reported by each company. However, for small and medium sized companies reporting obligations are less strict and these companies are not obliged to disclose turnover, profit before tax and other information such as number of employees etc. Where this data does not exist, MTW have provided an estimate based on previous performance, industry averages, other financial indicators and background knowledge of the industry.

Whilst we endeavour to attain high levels of accuracy, it should be borne in mind, therefore, that the rankings and other information provided within this report may contain an element of estimation.

5.4.2 Pump Suppliers Ranking By Turnover

The table illustrates our estimates of the turnover rank for each company:-

Figure 116: Pump Suppliers Ranked By Turnover 2011

REDACTED

Source: MTW Research / Company Accounts

5.4.3 Pump Suppliers Retailer Turnover Estimates 2011

The following table illustrates the estimated turnover for each company for 2011:-

Figure 117: Pump Suppliers Sales Estimates 2011 £M