

# Pharmaceutical Drying Equipment Global Market Insights 2025, Analysis and Forecast to 2030, by Manufacturers, Regions, Technology, Application, Product Type

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## Abstracts

### Pharmaceutical Drying Equipment Market Summary

#### Market Overview

Pharmaceutical drying equipment is a critical segment of the pharmaceutical manufacturing value chain, providing the necessary technologies to ensure the stability, safety, and efficacy of active pharmaceutical ingredients (APIs), intermediates, and final drug products. Drying is essential for controlling moisture levels, improving shelf-life, and enabling the safe transport and formulation of drugs. The global pharmaceutical drying equipment market was valued at USD 3.6–6.1 billion in 2024, and it is projected to expand steadily at a CAGR of approximately 4%–7% between 2025 and 2030. Growth is driven by the increasing complexity of drug formulations, rising demand for biologics and high-potency drugs, and the global expansion of pharmaceutical research and manufacturing capacity.

The market is characterized by a wide array of equipment types, including spray dryers, freeze dryers, fluidized bed dryers, and vacuum dryers, each serving distinct applications in drug development and commercial production. Technological advancements, such as continuous processing and energy-efficient designs, are reshaping the competitive landscape. Furthermore, as regulatory frameworks tighten globally, pharmaceutical companies and contract development and manufacturing organizations (CDMOs) are investing heavily in equipment that offers reliability, scalability, and compliance with good manufacturing practices (GMP).

## Application Analysis and Market Segmentation

**Pharmaceuticals:** The largest application segment, encompassing large-scale production of APIs, oral solid dosage forms, injectables, and biologics. CAGR: 4%–6%

**Research Institutes:** Universities, government labs, and private research organizations utilize drying technologies for formulation studies, small-batch production, and early-stage drug development. CAGR: 3%–5%

## By Equipment Type:

**Spray Dryer:** Widely used for producing amorphous solid dispersions, inhalation powders, and instant-dissolving formulations. Increasing adoption in continuous processing environments. CAGR: 5%–7%

**Freeze Dryer:** Essential for biologics, vaccines, and temperature-sensitive APIs. Controlled, continuous freeze-drying is gaining prominence. CAGR: 4%–6%

**Fluidized Bed Dryer:** Primarily applied for granules and powders, offering high efficiency and uniform drying. Increasing integration with automated systems. CAGR: 3%–5%

**Vacuum Dryer:** Preferred for moisture-sensitive and heat-sensitive materials, ensuring product stability without degradation. CAGR: 2%–4%

## Regional Market Distribution and Geographic Trends

**North America:** The United States dominates with advanced pharmaceutical manufacturing capabilities, a strong biotechnology sector, and regulatory emphasis on product safety and quality. CAGR: 4%–6%

**Europe:** Germany, Switzerland, and Italy are central hubs, benefiting from strong CDMO presence and leadership in specialty equipment manufacturing. Regulatory focus on continuous manufacturing drives innovation. CAGR: 3%–5%

**Asia-Pacific:** China and India are expanding rapidly, fueled by lower production costs, rising domestic demand, and growing CDMO services for Western pharmaceutical firms. Japan and South Korea also play significant roles in high-value drug manufacturing. CAGR: 5%–7%

**Latin America:** Emerging adoption in Brazil and Mexico, supported by investments in generics production and expanding healthcare infrastructure. CAGR: 2%–4%

**Middle East & Africa:** Smaller but growing market with rising interest in pharmaceutical self-sufficiency and investments in manufacturing hubs such as Saudi Arabia and South Africa. CAGR: 2%–3.5%

## Industry Value Chain Analysis

**Raw Material Supply:** Stainless steel, specialty alloys, and precision components form the backbone of drying equipment manufacturing.

**Equipment Design and Manufacturing:** Involves mechanical engineering, automation, and integration of cleanroom standards to meet GMP requirements.

**Distribution and Installation:** Equipment is supplied through direct channels or via distributors, requiring technical expertise for on-site installation and validation.

**End-Use Application:** Pharmaceutical manufacturers and research institutes deploy drying systems in both small-scale laboratories and commercial-scale facilities.

**After-Sales Service:** Includes validation, calibration, preventive maintenance, and upgrades, which are critical for compliance and long-term performance.

## Opportunities

Growing demand for biologics, vaccines, and personalized medicines requiring advanced drying solutions.

Expansion of CDMOs globally, creating a higher need for scalable and versatile drying systems.

Integration of continuous processing and smart automation to improve efficiency and compliance.

Rising adoption of energy-efficient and environmentally friendly drying technologies.

Increased pharmaceutical manufacturing investments in Asia-Pacific, driving regional equipment demand.

## Challenges

High capital expenditure associated with advanced drying equipment.

Stringent regulatory requirements demanding constant upgrades and validation.

Technical complexity of freeze-drying biologics, requiring precise control and specialized expertise.

Competitive pressure among established players and new entrants offering lower-cost equipment.

Supply chain disruptions and fluctuating raw material costs impacting equipment production.

## Key Market Players and Competitive Landscape

**GEA Group:** A global leader in process technology, GEA specializes in spray drying and fluidized bed drying systems. The company's focus on innovation and energy efficiency makes it a top supplier for large pharmaceutical producers and CDMOs.

**Freund:** Known for advanced fluidized bed dryers and coating systems, Freund emphasizes precision in solid dosage form production.

**ATS Corporation:** A multinational engineering and automation company offering customized drying and processing systems tailored to pharmaceutical clients.

**Hosokawa Micron:** Specializes in powder processing technologies, including advanced vacuum drying solutions for heat-sensitive APIs.

**Syntegon Technology:** A global provider of pharmaceutical equipment, Syntegon strengthened its portfolio with the acquisition of Telstar in October 2024, integrating freeze-dryers and aseptic systems.

**I.M.A. Industria Macchine Automatiche:** Through IMA Life, the company delivers world-class freeze-drying systems and has formed a strategic partnership with RheaVita in November 2024 to advance continuous freeze-drying technology.

**MechaTech Systems:** A UK-based manufacturer offering bespoke spray drying solutions tailored for pharmaceutical R&D.

**BUCHI Labortechnik:** A market leader in laboratory-scale spray dryers and freeze dryers, widely used in research institutes worldwide.

**OPTIMA:** Specializes in packaging and process equipment, including integrated drying and aseptic solutions for injectable drugs.

**BEW Engineering:** Focused on providing robust drying and granulation solutions for pharmaceutical and nutraceutical applications.

**Zirbus Technology:** A German company renowned for laboratory and pilot-scale freeze dryers, catering primarily to research institutions and biopharma companies.

**SPX Flow:** Offers highly engineered drying and mixing technologies, emphasizing performance and operational efficiency.

**European Spraydry Technologies:** A niche player providing customized spray drying solutions for pharmaceutical and chemical industries.

**Yamato Scientific:** Japanese manufacturer delivering a wide range of laboratory-scale drying systems, including vacuum and spray dryers.

Saka Engineering Systems: India-based engineering company providing cost-efficient drying solutions to domestic and global pharmaceutical clients.

## Downstream Processing and Application Integration

In pharmaceutical manufacturing, drying equipment plays a critical role in stabilizing APIs before formulation into tablets, capsules, or injectables.

Spray dryers are increasingly integrated with continuous manufacturing lines for amorphous solid dispersions and inhalable formulations.

Freeze-dryers are indispensable for biologics, particularly monoclonal antibodies, vaccines, and gene therapies, enabling long-term stability without refrigeration.

Fluidized bed dryers are combined with granulation and coating systems to create robust solid dosage forms.

Research institutes rely heavily on laboratory-scale dryers for pre-clinical drug development and pilot studies, ensuring smooth transfer to commercial-scale production.

## Recent Market Developments

October 31, 2024: Syntegon and Azbil Corporation completed the acquisition of Telstar by Syntegon, integrating freeze-dryers, fill-finish, and aseptic processing systems to strengthen its Pharma Liquid Business Unit.

November 18, 2024: IMA Life entered a strategic partnership with RheaVita, investing in controlled, continuous freeze-drying technologies to accelerate commercialization of biopharmaceutical solutions.

May 6, 2025: Pulse Drying Systems (PDS) relocated to a larger facility in Arizona, expanding its capacity for engineering, assembly, and customer support, reflecting strong growth in spray drying technology demand.

July 22, 2025: Aenova announced the expansion of its Killorglin site with a spray drying platform for amorphous solid dispersions (ASD) and inhalation powders, reinforcing CDMO capabilities in advanced formulations.

These developments highlight the industry's shift toward strategic acquisitions, partnerships, and capacity expansions to meet rising demand for advanced drying technologies, especially in biologics and continuous manufacturing applications.

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