

Sanitary Pumps and Valves Market - Global Industry Size, Share, Trends, Opportunity, and Forecast, Segmented By Valve Type (Single Seat Valve, Double Seat Valve, Butterfly Valve, Diaphragm Valve, Control Valve, and Others), By Pump Type (Centrifugal, Positive Displacement), By Material Type (Stainless Steel, Bronze, and Copper), By Hygiene Class (Standard, Aseptic, and Ultraclean), By Pump Power Source (Self-Priming, and Non-Self-Priming), By End-User Industry (Processed Food, Dairy, Alcoholic Beverage, Non Alcoholic Beverage, Pharmaceutical, and Others), By Region & Competition, 2021-2031F

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Abstracts

The Global Sanitary Pumps and Valves Market is projected to expand from a value of USD 4.39 Billion in 2025 to USD 6.13 Billion by 2031, achieving a CAGR of 5.72%. These specialized fluid handling components are engineered with smooth, nonporous surfaces and cavity-free designs to guarantee sterility during the production of pharmaceuticals and food products. The market is chiefly sustained by the enforcement of strict international hygiene mandates and the rising global demand for processed beverages, which requires dependable automated production systems. According to PMMI The Association for Packaging and Processing Technologies, shipments of U.S. packaging machinery were anticipated to rise by 2.5 percent in 2024 as manufacturers continued to fund advanced hygienic processing capabilities.

However, a major obstacle that may hinder market growth is the substantial initial capital expenditure needed for premium electropolished stainless steel equipment and the necessary compliance certifications. These high procurement costs frequently discourage small and medium-sized enterprises from upgrading legacy infrastructure to modern sanitary solutions, thereby restricting the potential customer base for manufacturers of high-grade flow control components.

Market Driver

The rapid growth of pharmaceutical and biopharmaceutical manufacturing acts as a primary catalyst for the sanitary pumps and valves market, driven by the essential requirement for contamination-free fluid handling in the creation of vaccines, biologics, and active pharmaceutical ingredients. As producers scale up operations to address global healthcare demands, they are increasingly adopting aseptic flow control systems that adhere to rigorous Good Manufacturing Practice (GMP) standards. This commitment to high-purity infrastructure is highlighted by the sector's massive financial dedication to innovation and capacity; according to EFPIA's 'The Pharmaceutical Industry in Figures' report from July 2025, the pharmaceutical industry invested approximately \$55 billion in European research and development in 2024, demonstrating the significant capital directed toward facilities requiring certified hygienic components.

Concurrently, the escalating global demand for processed food and beverage items is compelling the deployment of advanced sanitary equipment to guarantee product safety and prolong shelf life. Producers are transitioning toward automated processing lines featuring clean-in-place (CIP) and sterilize-in-place (SIP) functions to maintain stringent hygiene levels while optimizing throughput. According to the 'Data & Trends 2024' report by FoodDrinkEurope released in January 2025, the EU food and drink industry achieved a turnover of \$1.2 trillion, reflecting the vast scale of production reliant on dependable hygienic processing technologies. This operational expansion directly benefits component suppliers; for instance, GEA Group reported in 2025 that its Separation & Flow Technologies division generated revenue of \$1,581 million for the fiscal year 2024, emphasizing the strong commercial momentum for these specialized industrial solutions.

Market Challenge

The significant initial capital expenditure required for high-quality electropolished stainless steel equipment and related compliance certifications represents a major

barrier to the growth of the Global Sanitary Pumps and Valves Market. This financial load specifically discourages small and medium-sized enterprises from updating legacy infrastructure with modern hygienic solutions, effectively reducing the addressable market for manufacturers. When producers cannot justify the return on investment for these expensive, high-grade flow control components, they frequently postpone or cancel modernization initiatives, which directly decreases the volume of new equipment installations.

This restriction on capital investment is supported by recent industrial performance data indicating a contraction in demand. According to the VDMA Food Processing and Packaging Machinery Association, incoming orders for the food processing and packaging machinery sector dropped by 7 percent during the first seven months of 2024 compared to the prior period. This decline in machinery orders signals a distinct hesitation among manufacturers to commit to costly processing systems. As the acquisition of new machinery slows due to these high procurement costs, the derived demand for integrated sanitary pumps and valves is directly and negatively affected.

Market Trends

The development of energy-efficient and water-conserving design architectures is heavily impacting the market as manufacturers emphasize sustainability to reduce operating costs and adhere to environmental regulations. Companies are increasingly designing hydraulic systems and flow components that lower energy usage and water consumption during clean-in-place (CIP) cycles. This strategic focus on eco-friendly performance is fueling substantial commercial activity for key industry players; according to Sulzer's 'Annual Report 2024' published in February 2025, the company's Flow division realized a 12.3 percent increase in order intake, a growth trend primarily driven by major contracts in the energy transition and wastewater sectors where sustainable fluid handling is essential.

At the same time, the rapid adoption of single-use disposable sanitary components is transforming biopharmaceutical processing by eliminating cross-contamination risks and drastically reducing changeover times. This trend is defined by a structural shift from traditional electropolished stainless steel equipment to pre-sterilized, disposable flow paths that provide enhanced flexibility for multi-product manufacturing facilities. The strong market uptake of these technologies is proven by recent financial results from leading suppliers; according to Sartorius's 'Nine-Month Report 2025' from October 2025, the company's Bioprocess Solutions Division posted a 9.9 percent rise in sales revenue for the first three quarters of the year, underscoring the continued demand for

single-use technologies in drug production.

Key Market Players

Alfa Laval AB

Ampco Pumps Company

Dixon Valve & Coupling Company, LLC

Dover Corporation

GEA Group Aktiengesellschaft

Holland Applied Technologies, Inc.

IDEX Corporation

KSB SE & Co. KGaA

SPX Corporation

Tapflo Group

Report Scope

In this report, the Global Sanitary Pumps and Valves Market has been segmented into the following categories, in addition to the industry trends which have also been detailed below:

Sanitary Pumps and Valves Market, By Valve Type

Single Seat Valve

Double Seat Valve

Butterfly Valve

Diaphragm Valve

Control Valve

Others

Sanitary Pumps and Valves Market, By Pump Type

Centrifugal

Positive Displacement

Sanitary Pumps and Valves Market, By Material Type

Stainless Steel

Bronze

Copper

Sanitary Pumps and Valves Market, By Hygiene Class

Standard

Aseptic

Ultraclean

Sanitary Pumps and Valves Market, By Pump Power Source

Self-Priming

Non-Self-Priming

Sanitary Pumps and Valves Market, By End-User Industry

Processed Food

Dairy

Alcoholic Beverage

Non Alcoholic Beverage

Pharmaceutical

Others

Sanitary Pumps and Valves Market, By Region

North America

United States

Canada

Mexico

Europe

France

United Kingdom

Italy

Germany

Spain

Asia Pacific

China

India

Japan

Australia

South Korea

South America

Brazil

Argentina

Colombia

Middle East & Africa

South Africa

Saudi Arabia

UAE

Competitive Landscape

Company Profiles: Detailed analysis of the major companies present in the Global Sanitary Pumps and Valves Market.

Available Customizations:

Global Sanitary Pumps and Valves Market report with the given market data, TechSci Research offers customizations according to a company's specific needs. The following customization options are available for the report:

Company Information

Detailed analysis and profiling of additional market players (up to five).

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