

Peristaltic pump Market - Global Industry Size, Share, Trends, Opportunity, and Forecast, Segmented By Type (Hose pump, Tube pump), By Application (Metering, Dispensing), By End User Industry (Pharmaceutical & Medical, Water & Wastewater Treatment, Food & Beverage, Chemical Processing, Mining, Pulp & Paper, Others), By Region & Competition, 2021-2031F

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Abstracts

The Global Peristaltic Pump Market is projected to rise from USD 1.92 Billion in 2025 to USD 2.86 Billion by 2031, achieving a CAGR of 6.87%. These positive displacement devices function by moving fluid through a flexible tube using rotating rollers, a design that effectively isolates the liquid from the pump mechanism to prevent cross-contamination. This configuration is essential for handling sterile, abrasive, or shear-sensitive fluids. The market is primarily driven by the growing demand for aseptic processing in pharmaceutical manufacturing and the need for precise chemical dosing in water treatment facilities. Highlighting the substantial capital directed toward sectors dependent on such hygienic fluid handling, the European Federation of Pharmaceutical Industries and Associations (EFPIA) reported in 2024 that the research-based pharmaceutical industry invested an estimated ?55,000 million in R&D across Europe.

However, the market faces a significant constraint due to the limited lifespan of the flexible tubing component. The mechanical fatigue caused by continuous compression requires frequent replacement, leading to costly operational downtime. This maintenance burden often restricts the practicality of these pumps in high-volume industrial applications where long-term durability and continuous service are prioritized

over the benefits of fluid isolation.

Market Driver

The growth of global pharmaceutical and biopharmaceutical manufacturing acts as a major catalyst for the market, driving the adoption of peristaltic technology for sterile fluid transfer. These pumps are vital in upstream and downstream processing because they contain fluid within the tubing, ensuring zero cross-contamination while handling shear-sensitive biologics. According to the International Federation of Pharmaceutical Manufacturers and Associations' 'Facts and Figures 2024' report, the pharmaceutical industry currently invests nearly \$270 billion annually in R&D, generating a strong pipeline of new medicines that require such hygienic processing equipment. This sectoral activity translates directly into commercial success; for example, Spirax Group reported in August 2024 that its Watson-Marlow fluid technology division achieved 3% organic sales growth, supported by recovering demand from biopharmaceutical clients.

Concurrently, strict environmental regulations are forcing water and wastewater treatment facilities to modernize their chemical dosing and slurry handling systems. Unlike traditional pumps, peristaltic units can precisely meter abrasive or corrosive chemicals, such as lime slurry and sodium hypochlorite, without the risk of valve clogging or vapor lock. This operational reliability is increasingly essential as utilities face tighter compliance standards for effluent quality. In December 2024, Water UK noted that the regulator Ofwat approved a record \$104 billion investment plan for water and sewage infrastructure between 2025 and 2030, ensuring significant capital availability for upgrading these critical fluid management technologies.

Market Challenge

The restricted lifespan of the flexible tubing component constitutes a major impediment to the growth of the Global Peristaltic Pump Market. Because these pumps operate through the repeated compression and relaxation of the tube to propel fluid, the process inevitably causes mechanical fatigue and eventual rupture. In high-demand industrial environments, this vulnerability forces frequent pauses in production for tube replacement, disrupting continuous workflows and inflating operational costs. Consequently, these frequent maintenance intervals limit the technology's viability in applications where 'set-and-forget' durability is preferred over fluid isolation.

This maintenance burden is particularly problematic for end-users who are already managing extensive asset renewal programs to prevent downtime. For instance, the

water treatment sector is under immense pressure to maintain continuous operations while upgrading deteriorating systems. According to the American Water Works Association (AWWA), in 2024, 81% of water utilities were implementing capital improvement plans specifically to address the challenge of aging infrastructure and ensure system reliability. When peristaltic pumps require regular servicing for tubing changes, they exacerbate these existing operational strains, thereby dampening their adoption rate in sectors where minimizing downtime is critical.

Market Trends

The widespread adoption of Single-Use Technology (SUT) in bioprocessing is reshaping market preferences, steering the industry away from clean-in-place stainless steel equipment toward disposable fluid path solutions. This shift allows manufacturers to switch between products rapidly without extensive cleaning validation, a crucial capability for producing smaller batches of personalized medicines and viral vectors. Peristaltic pumps are central to this architecture because their mechanism allows the tubing to be treated as a consumable, ensuring sterility is maintained from upstream to fill-finish operations. According to Sartorius, in its February 2024 'Annual Report 2023', the company's Bioprocess Solutions division, which specializes in these single-use technologies, generated 77% of the group's total sales revenue, validating the overwhelming industry reliance on disposable processing platforms.

Simultaneously, the integration of IIoT and smart monitoring systems is transforming pump functionality from passive fluid transfer to active process intelligence. Operators are increasingly deploying pumps equipped with sensors that monitor tube wear, flow accuracy, and motor torque in real-time, enabling predictive maintenance strategies that mitigate the risk of catastrophic tubing rupture. This connectivity facilitates the seamless inclusion of pumping units into factory-wide automation networks, improving batch consistency and remote controllability. According to Rockwell Automation's '9th Annual State of Smart Manufacturing Report' from March 2024, 95% of manufacturers are currently using or evaluating smart manufacturing technologies, creating a mandate for pump OEMs to deliver digitized, data-capable units that align with these connected industrial ecosystems.

Key Market Players

Bombas Boyser, S.L.

Gilson, Inc.

Graco Inc.

Heidolph Instruments GmbH & Co. KG

Chongqing Jieheng Peristaltic Pumps Co., Ltd.

ProMinent GmbH

Ravel Hiteks Pvt. Ltd.

Spirax Group plc

Valmet Oyj

Wanner Engineering Inc.

Report Scope

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

Peristaltic pump Market, By Type

Hose pump

Tube pump

Peristaltic pump Market, By Application

Metering

Dispensing

Peristaltic pump Market, By End User Industry

Pharmaceutical & Medical

Water & Wastewater Treatment

Food & Beverage

Chemical Processing

Mining

Pulp & Paper

Others

Peristaltic pump 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 Peristaltic pump Market.

Available Customizations:

Global Peristaltic pump 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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