

# Liquid Handling System -Market Insights, Competitive Landscape and, Market Forecast - 2027

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## Abstracts

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Liquid Handling System Market By Type (Manual Liquid Handling, Automated Liquid Handling, And Semi-Automated Liquid Handling), By Product Type (Automated Workstations, Pipettes, Dispensers, Burettes, And Others), By Application (Drug Discovery And Research, Clinical Diagnostics, And Other Applications), By End-User (Pharmaceutical And Biotechnology Industry, Contract Research Organization, Academic Institutes, And Others) and by geography is expected to grow at a steady CAGR forecast till 2027 owing to the increasing research & developmental activities including the drug discovery and increasing prevalence of cancer and chronic disorders due to unhealthy lifestyles, increased exposure to toxic substances, age, tobacco, alcohol, and others

Global liquid handling system market was valued at USD 1,883 million in 2021, growing at a CAGR of 10.14% during the forecast period from 2022 to 2027 to reach USD 3,684 million by 2027. The increase in demand for liquid handling system is primarily attributed to the increasing expansion of pharmaceutical & biotechnology industries due to the increasing research & developmental activities including the drug discovery. Liquid handling systems are used in the discovery process. Moreover, the increasing government funding for research and developmental activities will further increase the drug and vaccine discovery, thereby expected to propel the demand of the system in the market. Additionally, the increasing demand for high-throughput screening used in drug discovery will increase the demand of the device. Moreover, the rising prevalence of chronic disorders worldwide due to various reasons will increase the demand of drug and vaccine discovery. In the drug discovery liquid handling systems are used, thereby increasing the demand of the system. Furthermore, the technological advancements

such as high accuracy, and others across the world are anticipated to bolster the market, thereby contributing to the growth of the liquid handling system market during the forecast period from 2022-2027.

#### Liquid Handling System Market Dynamics:

The liquid handling system market is witnessing a growth in product demand owing to various reasons.

The surging incidence of cancer and chronic disorder globally will increase the overall patient pool. The increasing patient pool will demand new and increase in the number of drugs in the market. During discovery of any new drug or vaccine, many devices are used. Some of the devices are microscopes, analyzers, liquid handling systems, and others. According to the Cancer Facts and Figures 2022, published by the American Cancer Society, it is estimated that a little over 1.9 million new cancer cases are expected to be diagnosed in the US in the year 2022. As per the above source, approximately 609,360 deaths from cancer are expected in the US in 2022, which is about 1,670 death cases per day. The increasing incidence of cancer and chronic disorders will increase the research and developmental activities, which is accompanied by the devices like liquid handling systems. This increasing research & developmental activities will ultimately increase the demand of the liquid handling system. Thus the above factor is anticipated to propel the overall market growth of the liquid handling systems in the study period of 2022 – 2027.

Furthermore, increasing prevalence of many chronic disorders such as diabetes, cardiovascular disorders, stroke, hypertension, and other will act as a driving factor for market of liquid handling system. For instance, according to International Diabetes Federation, Diabetes Atlas 10th edition report 2021, globally 537 million adults (20-79 years) are living with diabetes. This number is predicted to rise to 643 million by 2030 and 783 million by 2045. The increasing prevalence of diabetes will increase the need of drug discovery. In drug discovery, liquid handling system are used for mixing or blending of combining the reagents used in discovery, thereby increasing the demand of the system in the market. Henceforth, the above factor is anticipated to bolster the overall market growth of the liquid handling system in the forecast period of 2022 – 2027.

Healthy diet helps to prevent non communicable diseases, and chronic diseases including diabetes, cardiovascular diseases, some cancers and other conditions linked to obesity. Lack of physical activity and unhealthy diet is one of the leading global risks

to health. Chronic disease can be prevented by following a proper diet and indulging into physical activities on daily basis. For instance, according to data published in the year 2020 by Center for Disease Control and Prevention estimated that in the year 2020 there were over one-third (36.3%) of children and adolescents who consumed fast food on a daily basis. As owing to the large number of fast food and calories intake, the prevalence of chronic disorders may increase ultimately leading to urge in demand of new drugs in the market. This demand will increase the sales of the liquid handling devices, used in mixing, combing reagents during a drug discovery. Therefore, the increasing demand of liquid handling system in the market. Thus propelling the overall market growth of the system in the study period of 2022- 2027.

Thus, due to the increasing prevalence of cancer and chronic disorders and increasing drug discovery, globally, will pave its way to a rising demand for liquid handling system, in turn increasing the liquid handling system market growth.

However, high cost of advanced systems and possibility of errors in automated systems may hamper the product growth.

The ongoing COVID-19 pandemic has significantly increased the market for liquid handling devices as during the pandemic the research & developmental activities have been increased tremendously. Liquid handling systems are used by a research for mixing, combing, and storing a reagent used for the discover. However, during the onset of pandemic, the industries were shut down due to strict lockdown rules which decreased the research and developmental activities. But, gradually with the ease in lockdown rules, the increasing demand of drugs to treat chronic disease and coronavirus increases ultimately increasing the research & developmental activities. Owing to this fact, the leading market players accelerated their production of liquid handling systems thereby increasing the market demand of the liquid handling system, in turn, propelling the market growth of liquid handling systems during the forecast period of 2022-2027.

#### Liquid Handling System Market Segment Analysis:

Liquid handling system market by Type (Manual Liquid Handling, Automated Liquid Handling, and Semi-Automated Liquid Handling), Product Type (Automated Workstations, Pipettes, Dispensers, Burettes, and Others), Application (Drug Discovery And Research, Clinical Diagnostics, and Other Applications), End-User (Pharmaceutical and Biotechnology Industry, Contract Research Organization, Academic Institutes, and Others), and Geography (North America, Europe, Asia-Pacific, and Rest of the World)

In the type segment of the liquid handling system market, the automated liquid handling system is estimated to hold a significant share in the liquid handling system market in the year 2020. This can be ascribed to the various advantages that are associated with the segment.

For instance, automated liquid handling (ALH) systems are precisely programmed to handle liquids and deliver accurate and reproducible results without any complexity in clinical and research settings. Automated liquid handling system offers efficient and accurate liquid handling techniques which plays an important role in clinical and research laboratories.

Moreover, automated liquid handling systems can be optimized for use in techniques, including ELISA, time-resolved fluorescence, nucleic acid preparation, PCR setup, next-generation sequencing for genomic research, TLC spotting, SPE, liquid– liquid extraction, and other processes.

Additionally, automated liquid handling instruments have various advantages like it enables simplified sample preparation with consistent high accuracy and allows labs to free up manual labor and run more samples while maintaining reproducibility. It also helps to address sample preparation needs for proteins, metabolites, as well as genomics and NGS applications, reducing set up times and protocol development. Flexibility and adaptability, volume range capabilities, handling of samples of different viscosities, and contamination control are few advantages of automated liquid handling system.

Furthermore, the advantages of ALH systems over manual pipetting such as improved efficiency, enhanced safety also contributes in the growth of the market.

Moreover, the product launch in the local market, in turn, will drive the market of the liquid handling system. For instance, in October 2020, CELLINK, a global life-science company that provides technologies, products and services to create, understand and master biology, launched the C.WASH, an innovative automated liquid handling system for media change in cellular assays and tipless magnetic bead washing. The C.WASH help with high-throughput COVID-19 testing and research. The C.WASH offers a non-contact method of performing complex washing tasks, enabling automated and highly reproducible washing of micro well plates using centrifugal forces. It improves workflows by reducing costs and saving time when performing high throughput screening, cell-based assays and magnetic bead based nucleic acid extractions.

Thus, owing to the various advantages of the automated liquid handling systems, there will be an increase in the demand for automate liquid handling systems, which in turn will drive the liquid handling system market growth.

North America is expected to dominate the overall Liquid Handling System Market:

Among all the regions, North America is expected to account for the significant share in the global liquid handling system market.

Increasing research & developmental activities including the drug discovery and increasing demand for high-throughput screening used in drug discovery will increase the demand for liquid handling system in North America, leading to a rise in the overall liquid handling system market growth.

For instance, as per the data published by Centers for Disease Prevention and Control (CDC) National Diabetes Statistics Report 2022, it was estimated that about 1.4 million new cases of diabetes were diagnosed among US people of age 18 and older in the year 2019. As per the same source, it was estimated that in United States, in the year 2021, 37.3 million people had diabetes. From the above data it can be concluded that the prevalence of diabetes is increasing in US. The increasing prevalence will increase the demand of drugs used in the treatment and management of diabetes. Moreover, the increasing prevalence of cancer chronic disorders due to sedentary lifestyle, bad-eating habits, increased consumption of alcohol and tobacco, increasing intake of processed and packed food, increasing exposure to carcinogenic substance, and other factors will increase the research & developmental activities. The increasing prevalence of cancer and chronic disorder and increasing its risk factor will increase the patient pool in the region. The increased patient pool will increase the demand of old and new drugs and vaccine in the market. This increasing demand will increase the research & developmental activities. In research & developmental activities liquid handling system is used to dispense the sample liquids in tubes, for mixing and combining reagents, transferring liquid from one location to another in a laboratory, and in many other processes involved in research & developmental activities. Thus, the increasing prevalence of chronic disorder will increase the research & developmental activities ultimately increasing the demand of liquid handling system in the North America in the forecast period of 2022 – 2027.

Moreover, the increased government funding for research & developmental activities and developed healthcare infrastructure of the North America will also drive the market

of liquid handling system in the region.

Thus, all the above-mentioned factors are anticipated to propel the market for liquid handling system in the North America.

#### Liquid Handling System Market Key Players:

Some of the key market players operating in the liquid handling system market include Agilent Technologies, Bio-Rad Laboratories, Corning Incorporated, Eppendorf AG, Hamilton Company, Beckman Coulter, Inc., PerkinElmer, Inc., Promega Corporation, Thermo Fisher Scientific, Inc., METTLER TOLEDO., Aurora Biomed Inc., Gilson Incorporated., Sartorius AG, Tecan Group Ltd., Gardner Denver, Borosil Glass Works Ltd., Analytik Jena GmbH, Chemspeed Technologies AG., Biotron Healthcare., Sterling Systems and Controls, among others.

#### Recent Developmental Activities in the Liquid Handling System Market:

In February 2022, Festo, one of the automation company, introduces the Modular Gantry Robot platform for laboratory-based automated liquid handling. This new solution enables equipment designers to quickly realize their unique solutions with fewer mechanical and electrical engineering resources, speeding time to market. This platform is compatible with a broad range of media, offers exceptional repeatability at high speed, and can be easily calibrated for targeted applications.

In February 2022, SPT Labtech, a global leader in the design and development of automated instrumentation and consumables for life science applications, announced the launch of firefly®, an innovative liquid handling platform for next-generation sequencing (NGS) library preparation.

In October 2020, PerkinElmer, Inc., a global leader committed to innovating for a healthier world, launched the cannabis industry's first fully-automated liquid handling sample preparation and analysis workflow for pesticide residue testing of cannabis and hemp flower samples. The new end-to-end offering also includes cannabis-optimized reagents and sample prep consumables as well as proprietary cannabis SOPs and cloud-based tracking and reporting software.

#### Key Takeaways from the Liquid Handling System Market Report Study

Market size analysis for current liquid handling system market size (2021), and market forecast for 5 years (2022-2027)

The effect of the COVID-19 pandemic on this market is significant. To capture and analyze suitable indicators, our experts are closely watching the liquid handling system market.

Top key product/services/technology developments, merger, acquisition, partnership, joint venture happened for last 3 years

Key companies dominating the global liquid handling system market.

Various opportunities available for the other competitor in the liquid handling system market space.

What are the top performing segments in 2021? How these segments will perform in 2027.

Which is the top-performing regions and countries in the current liquid handling system market scenario?

Which are the regions and countries where companies should have concentrated on opportunities for liquid handling system market growth in the coming future?

Target Audience who can be benefited from this Liquid Handling System Market Report Study

Liquid handling system products providers

Research organizations and consulting companies

Liquid handling system-related organizations, associations, forums, and other alliances

Government and corporate offices

Start-up companies, venture capitalists, and private equity firms

Distributors and Traders dealing in liquid handling system

Various End-users who want to know more about the liquid handling system market and latest technological developments in the liquid handling system market.

Frequently Asked Questions for Liquid Handling System Market:

1. What are liquid handling system?

The Liquid Handling Systems, composed of medical tools and equipment that serve the purpose of combining, mixing, and blending the liquid samples. The liquid handling system encompasses the entire range including pipet to the multifunction workstation, which is used for various laboratory techniques such as ELISA, fluorescence, PCR reaction, nucleic acid preparation, next-generation sequencing (NGS) for genomic research, liquid-liquid extraction and many others.

2. What is the market for Global liquid handling system?

Global liquid handling system market was valued at USD 1,883 million in 2021, growing at a CAGR of 10.14% during the forecast period from 2022 to 2027 to reach USD 3,684 million by 2027.

3. What are the drivers for the Global liquid handling system market?

The liquid handling system market is witnessing a positive market growth owing to the increasing research & developmental activities including the drug discovery. Further, global expansion of pharmaceutical & biotechnology industries will increase the research and developmental activities, ultimately leading to increased demand of the liquid handling system. Additionally, the increasing government funding for research and developmental activities and the increasing demand for high-throughput screening used in drug discovery across the world are anticipated to bolster the market.

4. Who are the key players operating in the Global liquid handling system market?

Some of the key market players operating in the liquid handling system market includes Agilent Technologies, Bio-Rad Laboratories, Corning Incorporated, Eppendorf AG,



Hamilton Company, Beckman Coulter, Inc., PerkinElmer, Inc., Promega Corporation, Thermo Fisher Scientific, Inc., METTLER TOLEDO., Aurora Biomed Inc., Gilson Incorporated., Sartorius AG, Tecan Group Ltd., Gardner Denver, Borosil Glass Works Ltd., Analytik Jena GmbH, Chemspeed Technologies AG., Biotron Healthcare., Sterling Systems and Controls, and others.

#### 5. Which region has the highest share in liquid handling system market?

North America is expected to hold the highest share in the revenue in the liquid handling system market during the forecast period. Increasing research & developmental activities including the drug discovery and increasing demand for high-throughput screening used in drug discovery will increase the demand for liquid handling system in North America, leading to a rise in the overall liquid handling system market growth in this region. Further, expansion of pharmaceutical & biotechnology industries in the region will also propel the device market.

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