

Global Liquid Handling Systems Market 2023

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Abstracts

The global liquid handling systems market is forecast to grow substantially over the coming years, reaching an estimated value of \$5.4 billion by 2029. This represents a healthy compound annual growth rate of 5.9% between 2023 and 2029.

The rising prevalence of chronic diseases such as cancer, diabetes, and autoimmune disorders along with infectious diseases like COVID-19 has led to surging demand for both generic and novel therapeutics. This necessitates advanced liquid handling capabilities for high-throughput drug screening and production.

Biopharmaceutical production capacity has expanded rapidly in response to the COVID-19 pandemic. This has increased the need for lab automation and liquid handling systems to enable scaled-up output while maintaining quality and safety standards. Many biopharma companies have invested heavily in upgrading lab facilities during the pandemic.

Market Segmentation

The global liquid handling systems market can be segmented in various ways to better understand the diverse products, applications, end-users, and regional markets that comprise this industry:

Segmentation by Product

Systems (Automated Systems, Pipettes, Semi-Automated Systems)

Consumables (Disposable Tips, Reagent Containers, Tubes and Plates, Others)

Software

Segmentation by Application

Diagnostics (Cell-Based Assays, Dilution and Dispensing, ELISA, Sample Preparation, Sequencing, Others)

Drug Discovery (Array Printing, Cell Culture, High-Throughput Screening, PCR Setup, Plate Reformatting, Replica Plating, Serial Dilution, Whole Genome Amplification, Others)
Genomics and Proteomics (Genomics, Protein Analysis, Others)

Segmentation by End User

Academic Institutions
Biopharmaceutical Companies
Contract Manufacturing Organizations (CMOs)
Contract Research Organizations (CROs)
Diagnostic Companies
Others

Segmentation by Region

North America – U.S., Canada
Europe – Germany, France, U.K., Italy, Spain, Switzerland, Rest-of-Europe
Asia-Pacific – Japan, China, India, Australia, Rest-of-Asia-Pacific
Latin America – Brazil, Mexico, Rest-of-Latin America
Rest-of-the-World

The global liquid handling systems market is comprised primarily of three key product segments: systems, consumables, and software.

The systems segment, which includes automated liquid handling systems and electronic pipettes, accounts for a substantial share of the overall market. This segment has witnessed robust growth driven by surging demand from the biopharmaceutical industry, where these systems play an indispensable role in high-throughput screening, assays, and other drug discovery and development workflows. Leading manufacturers of automated liquid handlers and pipetting systems like Tecan, Eppendorf, and Thermo Fisher Scientific have consolidated their positions in this segment through continuous product innovation and portfolio expansion.

The consumables segment, including disposable plastic pipette tips, reagent reservoirs, microplates, and other labware, represents a steady revenue stream for liquid handling equipment vendors. This segment benefits from the recurrent purchase of these consumable lab supplies, which drive repeat business revenues.

The global liquid handling systems market is poised for steady growth at a compound annual growth rate of 5.5% during the 2023-2029 forecast period. Liquid handling

systems include a broad range of equipment and devices utilized in various laboratory techniques such as ELISA assays, PCR setup, nucleic acid preparation, and more. These systems enable the precision pipetting, dispensing, and manipulation of liquids during scientific workflows and processes.

Key application areas for liquid handling solutions include drug discovery, materials science research, forensics, clinical research and diagnostics, molecular biology, and pharmaceutical/biopharmaceutical development. For instance, automated liquid handlers are widely used in high-throughput screening and combinatorial chemistry in drug discovery. Similarly, pipettes and dispensers play a crucial role in PCR-based diagnostics and DNA sequencing workflows.

North America held the largest share of the global liquid handling systems market in 2022 and is poised to continue its rapid growth trajectory over the forecast period.

The region's prominence in this market stems from the high demand for advanced automated liquid handling systems from the well-established biotechnology and pharmaceutical industries in the United States. The rise in large-scale clinical trials and research & development activities has spurred the adoption of high-throughput automation technologies and solutions. Leading biopharma hubs in the U.S. such as Boston, San Francisco, and San Diego are major drivers of liquid handling systems demand.

Europe represents the second largest regional market, buoyed by significant R&D investments within Germany, France, the UK, and other countries. Automation is becoming integral to European labs and facilities involved in drug discovery, genomic research, and diagnostics.

The Asia-Pacific market, led by Japan, China, India, and Australia, is expected to exhibit the highest growth in the coming years. The expanding biopharma and biotechnology sectors in China and India point to high potential for automated liquid handling systems. Government initiatives supporting biosciences research are also fueling market growth in the region.

Competitive Landscape

Agilent Technologies, Inc., BICO Group AB (Formerly Cellink AB), Bio-Rad Laboratories, Inc., Corning Incorporated, Danaher Corporation, Endress+Hauser AG, Eppendorf AG, Gilson, Inc., Hamilton Company, Ingersoll Rand Inc., Lonza AG, Mettler-Toledo International Inc., PerkinElmer Inc., Sartorius AG, Tecan Group Ltd., Thermo

Fisher Scientific Inc., and Waters Corporation are prominent companies dominating the global liquid handling systems market. These players employ strategies such as partnerships, collaborations, and acquisitions to expand their market share. Both large conglomerates and small-medium manufacturers are actively seeking collaboration opportunities to enhance distribution networks and expand their global presence. This collaborative trend drives the growth of the global liquid handling systems market.

Scope of the Report

To analyze and forecast the market size of the global liquid handling systems market.

To classify and forecast the global liquid handling systems market based on product, application, end user, region.

To identify drivers and challenges for the global liquid handling systems market.

To examine competitive developments such as mergers & acquisitions, agreements, collaborations and partnerships, etc., in the global liquid handling systems market.

To identify and analyze the profile of leading players operating in the global liquid handling systems market.

Why Choose This Report

Gain a reliable outlook of the global liquid handling systems market forecasts from 2023 to 2029 across scenarios.

Identify growth segments for investment.

Stay ahead of competitors through company profiles and market data.

The market estimate for ease of analysis across scenarios in Excel format.

Strategy consulting and research support for three months.

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