

Global Non-contact Liquid Handling Workstation Supply, Demand and Key Producers, 2026-2032

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Abstracts

The global Non-contact Liquid Handling Workstation market size is expected to reach \$ 103 million by 2032, rising at a market growth of 8.0% CAGR during the forecast period (2026-2032).

A non-contact liquid handling workstation refers to an automated laboratory instrument used in processes such as pipetting, dispensing, sample loading, reagent addition, and sample transfer, without relying on traditional pipette tips or needles to directly contact the liquid surface, vessel walls, or sample itself. Instead, it enables quantitative liquid transfer through methods such as acoustic ejection and piezoelectric dispensing. Such systems are typically composed of liquid dispensing modules, motion control platforms, sample carriers, plate management systems, liquid level/droplet detection systems, software control systems, and environmental control modules. They can achieve high-precision dispensing at the microliter, nanoliter, or even picoliter level, with advantages such as low risk of cross-contamination, reduced consumable usage, suitability for low-volume high-throughput experiments, and friendliness to precious samples. They are mainly used in drug screening, next-generation sequencing sample preparation, PCR/qPCR assay setup, proteomics, cell analysis, synthetic biology, and high-throughput automated laboratories. In 2025, global production reached 215 units, with an average selling price of US\$263,500 per unit.

The non-contact liquid handling workstation is a high-end niche category within laboratory automation equipment. Its core value is not simply to replace conventional liquid handling workstations, but to complete microliter-, nanoliter-, or even picoliter-level liquid transfer through acoustic ejection, piezoelectric dispensing, microvalve dispensing, and other methods without direct contact between the sample and the dispensing mechanism, pipette tip, or needle. Represented by acoustic droplet ejection

technology, these systems can achieve tipless, needle-free, and tubing-free liquid transfer through acoustic energy and enable nanoliter-level droplet dispensing. For example, the Beckman Coulter Echo series emphasizes acoustic transfer of droplets as low as 2.5 nL without the need for traditional tips, needles, nozzles, or tubing to contact the sample, with applications covering drug discovery, sample management, synthetic biology, genomics, proteomics, and functional screening. DISPENDIX I.DOT is positioned as a non-contact liquid handling system capable of dispensing volumes as low as 8 nL, while reducing plastic consumable and reagent consumption.

From the perspective of the industry chain, the upstream segment mainly includes precision dispensing modules, acoustic/piezoelectric actuators, motion control platforms, droplet detection and vision recognition systems, microplates/carriers, control software, algorithm modules, and clean assembly and calibration components. Midstream companies are responsible for complete system design, dispensing consistency control, droplet volume calibration, software workflow development, plate-position compatibility, and automation integration. Downstream customers mainly include pharmaceutical companies, CROs/CDMOs, high-throughput screening laboratories, gene sequencing platforms, synthetic biology companies, research institutes, and clinical translational laboratories. The technical barriers of this industry are concentrated in micro-droplet stability, compatibility with liquids of different viscosities and surface tensions, low-residue and low-contamination control, plate-position compatibility, software method libraries, automation interfaces, and long-term operating reliability. Therefore, the complete system is not a standard mechanical assembly product, but rather an integrated system combining precision fluid control, laboratory automation, and application methodology.

From the perspective of the business model, non-contact liquid handling workstations generally feature small-batch production, high unit prices, and strong service attributes. Each unit requires a relatively long cycle of assembly, commissioning, calibration, and application validation. The annual capacity of a small-batch assembly and commissioning line can generally be estimated at 30-80 units, while production lines with higher modularization and a more mature supply chain may exceed 100 units. The gross margin of this industry is usually higher than that of conventional contact-based liquid handling workstations. The gross margin of high-end main systems can be estimated at approximately 45%-65%, while follow-up consumables, software, maintenance services, application method development, and automation integration services usually have higher profitability. However, if a project involves extensive customized integration, on-site validation, and interconnection with third-party

equipment, the project-based gross margin may be reduced by engineering delivery costs. Overall, the future growth of this industry will mainly be driven by the miniaturization of drug screening, the need to reduce reagent costs, automation in NGS sample preparation, high-throughput construction in synthetic biology, unmanned laboratories, and the reduction of disposable pipette tip consumption. However, market expansion is still constrained by high equipment prices, high user method migration costs, the difficulty of adapting to different liquid systems, and the high requirements for after-sales application support.

This report studies the global Non-contact Liquid Handling Workstation production, demand, key manufacturers, and key regions.

This report is a detailed and comprehensive analysis of the world market for Non-contact Liquid Handling Workstation and provides market size (US\$ million) and Year-over-Year (YoY) Growth, considering 2025 as the base year. This report explores demand trends and competition, as well as details the characteristics of Non-contact Liquid Handling Workstation that contribute to its increasing demand across many markets.

Highlights and key features of the study

Global Non-contact Liquid Handling Workstation total production and demand, 2021-2032, (Units)

Global Non-contact Liquid Handling Workstation total production value, 2021-2032, (USD Million)

Global Non-contact Liquid Handling Workstation production by region & country, production, value, CAGR, 2021-2032, (USD Million) & (Units), (based on production site)

Global Non-contact Liquid Handling Workstation consumption by region & country, CAGR, 2021-2032 & (Units)

U.S. VS China: Non-contact Liquid Handling Workstation domestic production, consumption, key domestic manufacturers and share

Global Non-contact Liquid Handling Workstation production by manufacturer, production, price, value and market share 2021-2026, (USD Million) & (Units)

Global Non-contact Liquid Handling Workstation production by Type, production, value, CAGR, 2021-2032, (USD Million) & (Units)

Global Non-contact Liquid Handling Workstation production by Application, production, value, CAGR, 2021-2032, (USD Million) & (Units)

This report profiles key players in the global Non-contact Liquid Handling Workstation

market based on the following parameters - company overview, production, value, price, gross margin, product portfolio, geographical presence, and key developments. Key companies covered as a part of this study include Beckman Coulter (Danaher), Revvity, Dispendix, Hamilton Robotics, etc.

This report also provides key insights about market drivers, restraints, opportunities, new product launches or approvals.

Stakeholders would have ease in decision-making through various strategy matrices used in analyzing the World Non-contact Liquid Handling Workstation market

Detailed Segmentation:

Each section contains quantitative market data including market by value (US\$ Millions), volume (production, consumption) & (Units) and average price (K US\$/Unit) by manufacturer, by Type, and by Application. Data is given for the years 2021-2032 by year with 2025 as the base year, 2026 as the estimate year, and 2027-2032 as the forecast year.

Global Non-contact Liquid Handling Workstation Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Global Non-contact Liquid Handling Workstation Market, Segmentation by Type:

Acoustic Technology

Inkjet-like Dispensing Technology

Others

Global Non-contact Liquid Handling Workstation Market, Segmentation by Technology:

Nanoliter Liquid Handling Workstation

Microliter Liquid Handling Workstation

Global Non-contact Liquid Handling Workstation Market, Segmentation by Sales Channel:

Direct Sales

Distribution

Global Non-contact Liquid Handling Workstation Market, Segmentation by Application:

Bio/Pharmaceutical Companies

Government Agencies

Medical Institutions

Universities and Research Institutes

Others

Companies Profiled:

Beckman Coulter (Danaher)

Revvity

Dispendix

Hamilton Robotics

Key Questions Answered:

1. How big is the global Non-contact Liquid Handling Workstation market?
2. What is the demand of the global Non-contact Liquid Handling Workstation market?
3. What is the year over year growth of the global Non-contact Liquid Handling Workstation market?
4. What is the production and production value of the global Non-contact Liquid Handling Workstation market?
5. Who are the key producers in the global Non-contact Liquid Handling Workstation market?
6. What are the growth factors driving the market demand?

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