

Global Tip-based Automated Liquid Handling Workstation Supply, Demand and Key Producers, 2026-2032

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Abstracts

The global Tip-based Automated Liquid Handling Workstation market size is expected to reach \$ 1745 million by 2032, rising at a market growth of 5.8% CAGR during the forecast period (2026-2032).

A Tip-based Automated Liquid Handling Workstation refers to an automated laboratory instrument that uses disposable pipette tips as the core liquid transfer component in experimental processes such as pipetting, dispensing, sample loading, sample transfer, reagent addition, dilution, and mixing. Supported by automated pipetting channels, pump and valve control, liquid level detection, motion control, and software-based workflow management, it enables automated liquid aspiration, transfer, and dispensing. Such systems are typically composed of pipetting arms, single-channel or multi-channel pipetting modules, disposable tip loading and tip ejection systems, liquid level detection systems, plate positions/sample racks, pump and valve control modules, motion control platforms, software control systems, and safety protection modules. They can handle liquids from the microliter to milliliter range and feature strong versatility, broad workflow compatibility, mature method development, a high degree of automation, good cross-contamination control, and relatively controllable delivery costs. They are widely used in clinical testing, drug screening, next-generation sequencing sample preparation, PCR/qPCR assay setup, ELISA, cell experiments, sample pretreatment, chemical analysis, and high-throughput laboratory automation. In 2025, global production of Tip-based Automated Liquid Handling Workstations reached 12,131 units, with an average selling price of US\$94,700 per unit.

The Tip-based Automated Liquid Handling Workstation is one of the most widely used and commercially mature categories in laboratory automation equipment. It mainly uses

disposable pipette tips to perform liquid aspiration, transfer, dispensing, dilution, and mixing, serving as an important platform for upgrading manual pipetting toward automation, standardization, high-throughput operation, and walk-away laboratory workflows. Compared with non-contact liquid handling workstations, tip-based systems have clear advantages in versatility, consumable availability, workflow compatibility, mature method development, and relatively controllable procurement costs. Compared with fixed-needle, washable-probe, or tubing-based dispensing systems, disposable tip-based solutions are more advantageous in reducing cross-contamination risk, adapting to biological samples, and simplifying cleaning validation. As a result, they have become a mainstream equipment format in clinical testing, life science research, pharmaceutical R&D, molecular diagnostics, gene sequencing, PCR/qPCR assay setup, ELISA, cell experiments, sample management, and high-throughput laboratory automation.

From the perspective of the industry chain, the upstream segment mainly includes disposable pipette tips, pipetting channels, precision pumps and valves, liquid level detection modules, motion control systems, guide rails and lead screws, sensors, control boards, software systems, safety protection components, and sample carriers. Midstream companies are responsible for complete system design, pipetting module integration, tip compatibility, fluidic control, pipetting accuracy calibration, software workflow development, plate-position compatibility, and system validation. Downstream customers mainly include hospital laboratories, third-party medical laboratories, pharmaceutical companies, CROs, research institutes, sequencing service providers, in vitro diagnostics companies, and food, environmental, and chemical analysis laboratories. Competition in this industry is not limited to pipetting accuracy and repeatability, but also depends on long-term operating stability, compatibility with different tips and consumable systems, liquid level detection reliability, aerosol contamination prevention design, software usability, automation scalability, LIMS/ELN connectivity, and after-sales application support capabilities.

From the perspective of manufacturing and business operations, tip-based automated liquid handling workstations are precision instruments characterized by small-batch production, multiple models, and relatively high unit prices. The production process usually includes frame assembly, motion platform calibration, pipetting module assembly, pump and fluidic testing, tip loading system commissioning, software integration, accuracy verification, and system burn-in testing. The annual capacity of a standard assembly and commissioning line can generally be estimated at 150?500 units, while companies with higher modularization, a mature supply chain, and more standardized products may further increase single-line annual capacity to more than 500?800 units. The gross margin of complete systems is generally higher than that of

ordinary general-purpose laboratory equipment. Low- to mid-end platforms are typically in the range of 30%-40%, while mid- to high-end automated workstations are usually around 40%-55%. If dedicated tips, reagent kits, software licenses, maintenance services, and automation integration projects are included, overall profitability can be further enhanced. Future industry growth will mainly be driven by laboratory cost reduction and efficiency improvement, expanding sample processing volumes, automation in molecular diagnostics and sequencing, high-throughput drug screening, standardization of clinical laboratories, and the construction of walk-away laboratories. At the same time, the industry still faces constraints such as long customer budget cycles, lengthy equipment validation processes, strong technical accumulation by imported brands, insufficient high-end application method libraries among domestic brands, and relatively high dependence on tip consumable ecosystems.

This report studies the global Tip-based Automated Liquid Handling Workstation production, demand, key manufacturers, and key regions.

This report is a detailed and comprehensive analysis of the world market for Tip-based Automated 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 Tip-based Automated Liquid Handling Workstation that contribute to its increasing demand across many markets.

Highlights and key features of the study

Global Tip-based Automated Liquid Handling Workstation total production and demand, 2021-2032, (Units)

Global Tip-based Automated Liquid Handling Workstation total production value, 2021-2032, (USD Million)

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

Global Tip-based Automated Liquid Handling Workstation consumption by region & country, CAGR, 2021-2032 & (Units)

U.S. VS China: Tip-based Automated Liquid Handling Workstation domestic production, consumption, key domestic manufacturers and share

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

Global Tip-based Automated Liquid Handling Workstation production by Type, production, value, CAGR, 2021-2032, (USD Million) & (Units)

Global Tip-based Automated Liquid Handling Workstation production by Application, production, value, CAGR, 2021-2032, (USD Million) & (Units)

This report profiles key players in the global Tip-based Automated 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), Hamilton Robotics, Tecan, Revvity, Agilent, Eppendorf, SPT Labtech, AMTK, Analytik Jena (Endress+Hauser), BRAND, 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 Tip-based Automated 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 Tip-based Automated Liquid Handling Workstation Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Global Tip-based Automated Liquid Handling Workstation Market, Segmentation by Type:

Semi-automatic Liquid Handling Workstation

Automatic Liquid Handling Workstation

Global Tip-based Automated Liquid Handling Workstation Market, Segmentation by Technology:

Nanoliter Liquid Handling Workstation

Microliter Liquid Handling Workstation

Global Tip-based Automated Liquid Handling Workstation Market, Segmentation by Sales Channel:

Direct Sales

Distribution

Global Tip-based Automated Liquid Handling Workstation Market, Segmentation by Application:

Bio/Pharmaceutical Companies

Government Agencies

Medical Institutions

Teaching and Scientific Research Institutions

Others

Companies Profiled:

Beckman Coulter (Danaher)

Hamilton Robotics

Tecan

Rewvity

Agilent

Eppendorf

SPT Labtech

AMTK

Analytik Jena (Endress+Hauser)

BRAND

MGI Tech

Dispendix

Aurora Biomed

Sansure Biotech

Gilson

Hudson Robotics

TXTB

D.C.Labware

RayKol

Ningbo Scientz Biotechnology

Key Questions Answered:

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

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