

Global Non-contact Liquid Handling Workstation Market Growth 2026-2032

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Abstracts

The global Non-contact Liquid Handling Workstation market size is predicted to grow from US\$ 55.43 million in 2025 to US\$ 100 million in 2032; it is expected to grow at a CAGR of 8.5% from 2026 to 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.

LP Information, Inc. (LPI) ' newest research report, the "Non-contact Liquid Handling Workstation Industry Forecast" looks at past sales and reviews total world Non-contact Liquid Handling Workstation sales in 2025, providing a comprehensive analysis by region and market sector of projected Non-contact Liquid Handling Workstation sales for 2026 through 2032. With Non-contact Liquid Handling Workstation sales broken down by region, market sector and sub-sector, this report provides a detailed analysis in US\$ millions of the world Non-contact Liquid Handling Workstation industry.

This Insight Report provides a comprehensive analysis of the global Non-contact Liquid Handling Workstation landscape and highlights key trends related to product segmentation, company formation, revenue, and market share, latest development, and M&A activity. This report also analyzes the strategies of leading global companies with a focus on Non-contact Liquid Handling Workstation portfolios and capabilities, market entry strategies, market positions, and geographic footprints, to better understand these firms' unique position in an accelerating global Non-contact Liquid Handling Workstation market.

This Insight Report evaluates the key market trends, drivers, and affecting factors shaping the global outlook for Non-contact Liquid Handling Workstation and breaks down the forecast by Type, by Application, geography, and market size to highlight emerging pockets of opportunity. With a transparent methodology based on hundreds of bottom-up qualitative and quantitative market inputs, this study forecast offers a highly nuanced view of the current state and future trajectory in the global Non-contact Liquid Handling Workstation.

This report presents a comprehensive overview, market shares, and growth opportunities of Non-contact Liquid Handling Workstation market by product type, application, key manufacturers and key regions and countries.

Segmentation by Type:

Acoustic Technology

Inkjet-like Dispensing Technology

Others

Segmentation by Technology:

Nanoliter Liquid Handling Workstation

Microliter Liquid Handling Workstation

Segmentation by Sales Channel:

Direct Sales

Distribution

Segmentation by Application:

Bio/Pharmaceutical Companies

Government Agencies

Medical Institutions

Universities and Research Institutes

Others

This report also splits the market by region:

Americas

United States

Canada

Mexico

Brazil

APAC

China

Japan

Korea

Southeast Asia

India

Australia

Europe

Germany

France

UK

Italy

Russia

Middle East & Africa

Egypt

South Africa

Israel

Turkey

GCC Countries

The below companies that are profiled have been selected based on inputs gathered from primary experts and analysing the company's coverage, product portfolio, its market penetration.

Beckman Coulter (Danaher)

Rewvity

Dispendix

Hamilton Robotics

Key Questions Addressed in this Report

What is the 10-year outlook for the global Non-contact Liquid Handling Workstation market?

What factors are driving Non-contact Liquid Handling Workstation market growth, globally and by region?

Which technologies are poised for the fastest growth by market and region?

How do Non-contact Liquid Handling Workstation market opportunities vary by end market size?

How does Non-contact Liquid Handling Workstation break out by Type, by Application?

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