

# **Automated Sample Preparation Market - Global Industry Size, Share, Trends, Opportunity, and Forecast, Segmented By Application (Research and Development, Diagnostics), By Product Type (Kits and Consumables, Instruments), By End-User (Biotechnology and Pharmaceutical Companies, Clinical and Diagnostic Laboratories, Academic and Research Institutions), By Region and Competition, 2019-2029F**

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## **Abstracts**

Global Automated Sample Preparation Market was valued at USD 1.39 Billion in 2023 and is anticipated to project impressive growth in the forecast period with a CAGR of 9.47% through 2029. The Global Automated Sample Preparation Market is experiencing significant growth, driven by advancements in technology and the increasing demand for high-throughput and accurate sample analysis across various industries. Automated sample preparation systems are essential in laboratories for ensuring precision, efficiency, and reproducibility in sample processing. These systems are extensively used in fields such as pharmaceuticals, biotechnology, clinical diagnostics, forensic laboratories, food and beverage testing, and environmental analysis. The primary factors fueling the market's expansion include the rising prevalence of chronic diseases, which necessitates extensive clinical research and diagnostic testing, and the stringent regulatory requirements in the food and beverage and pharmaceutical sectors to ensure product safety and quality. For instance, According to the latest data from the Center for Disease Control and Prevention as of February 2024, chronic diseases pose a notable prevalence in the United States, impacting approximately 129 million individuals who suffer from at least one major chronic ailment. These conditions, encompassing heart

disease, cancer, diabetes, obesity, and hypertension as per the definitions provided by the US Department of Health and Human Services, represent a substantial health challenge. Notably, five of the top ten leading causes of mortality in the US are either chronic diseases or strongly associated with them, underscoring the imperative for preventive strategies and effective treatments to address these health issues. The integration of artificial intelligence and robotics in automated systems enhances workflow efficiency and minimizes human error, further propelling market growth.

Applications of automated sample preparation systems span genomics, proteomics, and others, with genomics being the dominant segment owing to the increasing focus on genetic research and personalized medicine. End-users of these systems include pharmaceutical and biotechnology companies, diagnostic laboratories, and research institutes.

## Key Market Drivers

### Technological Advancements in Laboratory Automation

Technological advancements in laboratory automation are revolutionizing the field of sample preparation, driving the growth of the Global Automated Sample Preparation Market. At the forefront of these advancements are innovations in robotics, artificial intelligence (AI), and machine learning, which are transforming traditional laboratory workflows into highly efficient, precise, and reproducible processes. Modern automated sample preparation systems incorporate advanced robotic arms and automated workstations that can handle complex tasks such as pipetting, mixing, centrifugation, and liquid handling with exceptional accuracy and speed. These robotic systems minimize human intervention, reducing the risk of contamination and human error, which is critical for maintaining the integrity of samples and the reliability of results.

AI and machine learning algorithms are being integrated into automated systems to enhance their capabilities. These technologies enable systems to learn from previous operations, adapt to new tasks, and optimize workflows autonomously. For example, AI-driven systems can monitor the quality of sample preparations in real-time, detect anomalies, and make necessary adjustments without human intervention. This not only improves efficiency but also ensures consistent and high-quality outputs.

The integration of advanced imaging and detection technologies, such as high-resolution cameras and spectrometers, into automated systems allows for precise monitoring and analysis of samples. These technologies facilitate the accurate

identification and quantification of biological and chemical substances, which is essential for applications such as genomics, proteomics, and drug discovery.

The advent of the Internet of Things (IoT) in laboratory automation has enabled seamless connectivity between devices and systems. This connectivity allows for real-time data sharing and integration across various laboratory instruments, enhancing collaborative research and streamlining data management. Automated sample preparation systems now feature sophisticated software that enables comprehensive data tracking, analysis, and reporting, further enhancing the efficiency and accuracy of laboratory operations.

### Rising Demand for High-Throughput Screening

The rising demand for high-throughput screening (HTS) is a significant driver of the Global Automated Sample Preparation Market. High-throughput screening is a powerful method used in drug discovery and various fields of biological research, allowing scientists to conduct millions of chemical, genetic, or pharmacological tests rapidly. This capability is crucial for identifying active compounds, antibodies, or genes that modulate a particular biomolecular pathway.

One of the primary benefits of HTS is its ability to process a vast number of samples quickly and efficiently. Traditional manual methods of sample preparation and analysis are time-consuming and prone to human error. Automated systems, equipped with advanced robotics and precision instruments, can handle thousands of samples simultaneously with consistent accuracy. This efficiency is particularly valuable in the pharmaceutical industry, where time-to-market is critical, and in clinical diagnostics, where rapid results can significantly impact patient outcomes.

In drug discovery, HTS is indispensable for screening large libraries of chemical compounds to identify potential drug candidates. Automated sample preparation systems streamline the process by preparing samples for various assays, including biochemical, cell-based, and phenotypic screens. The high accuracy and reproducibility of automated systems ensure that the data generated is reliable, which is essential for the subsequent stages of drug development. HTS is also pivotal in genetic and genomic research, where large-scale analyses are required to understand complex biological systems and disease mechanisms. Automated sample preparation systems facilitate the preparation of samples for next-generation sequencing (NGS), polymerase chain reaction (PCR), and other genomic technologies. These systems ensure that samples are handled uniformly, which is crucial for obtaining high-quality data.

While the initial investment in automated HTS systems can be high, the long-term benefits include significant cost savings. The ability to process large numbers of samples quickly reduces labor costs and increases the throughput of research activities. The accuracy and reproducibility of automated systems reduce the need for repeat experiments, saving both time and resources.

## Key Market Challenges

### High Initial Investment and Maintenance Costs

One of the primary challenges hindering the growth of the Global Automated Sample Preparation Market is the high initial investment and maintenance costs associated with automated systems. Advanced automated sample preparation technologies require substantial capital outlay for acquisition, installation, and integration into existing laboratory workflows. This high cost can be prohibitive for smaller laboratories and research institutions with limited budgets, making it difficult for them to adopt these advanced systems.

In addition to the initial purchase cost, ongoing maintenance and operational expenses can also be significant. Automated systems often require specialized training for staff, regular servicing, and updates to maintain optimal performance. The cost of consumables and reagents, which are specifically designed for use with automated systems, can further increase operational expenses. These factors collectively raise the total cost of ownership, potentially outweighing the benefits for some organizations. Consequently, the high costs associated with acquiring and maintaining automated sample preparation systems pose a significant barrier to their widespread adoption, particularly in resource-constrained settings.

### Technical Complexity and Integration Challenges

The technical complexity of automated sample preparation systems presents another major challenge to market growth. These systems involve sophisticated hardware and software components that must work seamlessly together to ensure reliable and accurate sample preparation. Integrating automated systems into existing laboratory workflows can be technically challenging, requiring significant customization and configuration. Laboratories often need to upgrade or modify their infrastructure to accommodate these advanced systems, which can be a complex and time-consuming process.

The interoperability of automated systems with other laboratory equipment and information management systems is crucial for seamless operation. Ensuring compatibility and smooth data flow between different systems can be challenging, particularly in laboratories with diverse and aging equipment.

## Key Market Trends

### Growth in Pharmaceutical and Biotechnology Industries

The growth in the pharmaceutical and biotechnology industries is a pivotal driver of the Global Automated Sample Preparation Market. These industries rely heavily on advanced technologies to streamline research and development processes, enhance productivity, and bring new products to market more efficiently. Automated sample preparation systems have become integral in achieving these objectives, contributing to the market's expansion.

The rising incidence of chronic diseases such as cancer, diabetes, and cardiovascular disorders necessitates extensive research and development of new therapies. Pharmaceutical companies are under constant pressure to innovate and develop effective treatments. Automated sample preparation systems facilitate high-throughput and precise sample analysis, which is crucial for drug discovery and development. These systems ensure consistent and accurate preparation of biological samples, enabling researchers to focus on analyzing data and advancing their research.

The drug development process is complex and time-consuming, involving multiple stages from initial discovery to clinical trials and regulatory approval. Automated sample preparation systems help accelerate this process by increasing the efficiency and accuracy of sample handling. They enable the simultaneous processing of numerous samples, reducing the time required for screening potential drug candidates and optimizing lead compounds. This efficiency is vital for pharmaceutical companies aiming to expedite the time-to-market for new drugs.

The shift towards personalized medicine is another significant factor driving the demand for automated sample preparation systems. Personalized medicine involves tailoring medical treatments to individual patient characteristics, often based on genetic information. This approach requires detailed genetic and molecular analyses, which automated systems can perform with high precision and reproducibility. The ability to process large volumes of genetic samples efficiently is essential for the development of

personalized therapies and diagnostics.

The biotechnology industry is characterized by rapid innovations and the development of cutting-edge technologies such as CRISPR gene editing, next-generation sequencing (NGS), and biopharmaceuticals. Automated sample preparation systems are crucial for these advanced applications, providing the necessary precision and throughput. For instance, in NGS, automated systems prepare DNA or RNA samples for sequencing, ensuring high-quality results essential for genetic research and diagnostics.

Pharmaceutical and biotechnology companies must adhere to stringent regulatory standards to ensure the safety and efficacy of their products. Automated sample preparation systems enhance compliance by providing reproducible and traceable results. They minimize the risk of human error and contamination, which is critical for meeting regulatory requirements and maintaining product integrity.

### Expanding Clinical Diagnostic Applications

Molecular diagnostics, including PCR (Polymerase Chain Reaction) and next-generation sequencing (NGS), rely heavily on automated sample preparation systems. These technologies require precise and reproducible preparation of DNA and RNA samples to detect genetic mutations, pathogens, and other biomarkers. Automated systems ensure that these processes are carried out with high accuracy, reducing the risk of contamination and human error. This precision is critical for diagnosing diseases such as cancer, infectious diseases, and genetic disorders, where accurate detection can significantly impact treatment decisions and patient outcomes.

The COVID-19 pandemic highlighted the importance of rapid and reliable diagnostic testing. Automated sample preparation systems have been instrumental in scaling up testing capabilities, enabling laboratories to process large volumes of samples quickly and efficiently. Beyond COVID-19, these systems are essential for diagnosing a wide range of infectious diseases, including influenza, HIV, and tuberculosis. By automating the sample preparation process, laboratories can achieve faster turnaround times, allowing for timely diagnosis and treatment.

In the field of oncology, automated sample preparation systems play a vital role in cancer genomics and personalized medicine. These systems prepare samples for various genomic assays, helping to identify genetic alterations that drive cancer progression. Accurate genomic profiling is essential for developing targeted therapies and improving patient outcomes. Automated systems ensure that the sample



preparation is consistent and reliable, supporting the high-throughput needs of cancer research and clinical diagnostics.

Automated sample preparation is also expanding in clinical chemistry and immunoassays, where precise handling of blood, serum, and other biological samples is crucial. These applications require the preparation of samples for analysis of biochemical markers, hormones, and proteins. Automated systems enhance the efficiency and accuracy of these processes, ensuring consistent and reliable results. This reliability is essential for monitoring chronic conditions, managing metabolic disorders, and conducting routine health screenings.

The rise of point-of-care (POC) testing is further driving the adoption of automated sample preparation systems. POC testing allows for rapid diagnostic tests at or near the site of patient care, providing immediate results. Automated sample preparation systems integrated into POC devices streamline the testing process, making it more user-friendly and reducing the need for specialized laboratory personnel. This convenience is crucial for improving patient access to diagnostic services, particularly in remote or underserved areas.

## Segmental Insights

## Application Insights

Based on the Application, In 2023, the Diagnostics segment emerged as the dominant segment in the Global Automated Sample Preparation Market. Precision medicine, which involves tailoring medical treatments to individual patient characteristics, has gained significant traction in recent years. Diagnostic laboratories are increasingly utilizing advanced genomic and molecular techniques to identify biomarkers and genetic variations associated with diseases. Automated sample preparation systems play a crucial role in this process by efficiently processing and analyzing patient samples to extract genetic material for sequencing and analysis. The accuracy, reproducibility, and high-throughput capabilities of automated systems make them well-suited for diagnostic applications, particularly in the context of precision medicine.

The global burden of chronic diseases such as cancer, cardiovascular disorders, and diabetes continues to rise, driving the demand for advanced diagnostic solutions. Automated sample preparation systems enable clinical laboratories to efficiently process large volumes of samples for various diagnostic tests, including molecular diagnostics, immunoassays, and clinical chemistry. This scalability and efficiency are

essential for meeting the growing demand for diagnostic services, particularly in the context of population screening and disease monitoring.

### Product Type Insights

Based on the product type, the Instruments segment is anticipated to emerge as the dominant segment in the Global Automated Sample Preparation Market. The rapid pace of technological advancements in automated sample preparation instruments, such as robotic workstations and liquid handling systems, is driving their adoption across various industries. These instruments offer advanced features, including high-throughput capabilities, precise automation, and integration with other laboratory equipment and software systems. As laboratories seek to improve efficiency, accuracy, and workflow automation, the demand for sophisticated instruments is expected to increase significantly.

Automated sample preparation instruments offer greater customization and flexibility compared to kits and consumables. Laboratories can configure these instruments to meet their specific workflow requirements and accommodate diverse sample types and assays. Modular designs and compatibility with a wide range of accessories and consumables enhance the versatility of automated instruments. This customization and flexibility appeal to laboratories with diverse research needs and applications, driving the demand for instruments over standardized kits and consumables.

### Regional Insights

North America emerged as the dominant region in the Global Automated Sample Preparation Market in 2023, holding the largest market share. North America boasts one of the most advanced healthcare infrastructures globally, with a robust network of hospitals, diagnostic laboratories, research institutions, and biotechnology companies. The region's well-established healthcare system, coupled with high healthcare expenditure, fosters the adoption of innovative technologies like automated sample preparation systems. These systems are widely utilized across various healthcare settings for diagnostic testing, drug discovery, and research purposes.

North America is a global hub for scientific research and innovation, particularly in the fields of biotechnology, pharmaceuticals, and life sciences. The region is home to numerous leading research institutions, universities, and biotech firms that drive significant R&D investment. The continuous focus on research and development fuels the demand for advanced laboratory technologies, including automated sample



preparation systems. These systems enable researchers to streamline workflows, improve productivity, and accelerate scientific discoveries.

### Key Market Players

Agilent Technologies, Inc.

Aurora Biomed Inc.

Danaher Corporation

F. Hoffmann-La Roche Ltd

Metrohm AG

Mettler-Toledo International Inc

MGI Tech Co., Ltd.

Promega Corporation

QIAGEN N.V.

Revvity, Inc.

### Report Scope:

In this report, the Global Automated Sample Preparation Market has been segmented into the following categories, in addition to the industry trends which have also been detailed below:

Automated Sample Preparation Market, By Application:

Research and Development

Diagnostics

Automated Sample Preparation Market, By Product Type:

Kits and Consumables

Instruments

Automated Sample Preparation Market, By End-User:

Biotechnology and Pharmaceutical Companies

Clinical and Diagnostic Laboratories

Academic and Research Institutions

Automated Sample Preparation Market, By Region:

North America

United States

Canada

Mexico

Europe

France

United Kingdom

Italy

Germany

Spain

Asia-Pacific

China

India

Japan

Australia

South Korea

South America

Brazil

Argentina

Colombia

Middle East & Africa

South Africa

Saudi Arabia

UAE

## Competitive Landscape

Company Profiles: Detailed analysis of the major companies present in the Global Automated Sample Preparation Market.

## Available Customizations:

Global Automated Sample Preparation market report with the given market data, TechSci Research offers customizations according to a company's specific needs. The following customization options are available for the report:

## Company Information

Detailed analysis and profiling of additional market players (up to five).



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