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Laboratory Information System Market - Global Industry Size, Share, Trends, Opportunity, and Forecast, 2018-2028 Segmented By Product (Standalone LIS, Integrated LIS), By Component (Services, Software), By Delivery Mode (On-Premises, Cloud-Based), By End-user (Hospital Labs, Independent Labs, Physician Office Laboratories, Others), By Region and Competition

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Abstracts

Global Laboratory Information System Market has valued at USD 1.90 Billion in 2022 and is anticipated to project impressive growth in the forecast period with a CAGR of 8.37% through 2028. The Laboratory Information System (LIS) is a software system utilized for the management, recording, and storage of data in clinical laboratories. This system facilitates the transmission of lab test orders to lab instruments and tracks and records results in a searchable database. It is extensively employed in hospitals, clinics, independent laboratories, and other healthcare settings to monitor and manage data, ensure data quality, enhance security, and facilitate end-user billing. Laboratory automation is increasingly adopted to address labor shortages and reduce manual intervention in lab processes.

The use of dedicated workstations and software to automate common lab activities improves lab productivity and allows researchers to focus on critical tasks. Automation ensures high-quality data and simplifies documentation. Stringent regulatory requirements for accurate results drive the development of standardized systems with reproducible outcomes. The advent of cloud-based services has brought significant advancements to the LIS market. Virtualization advancements and improved access to

high-speed internet enable faster innovation at reduced costs. Companies opting for cloud-based solutions only need to pay for software subscriptions, eliminating the need for full licenses. This approach significantly reduces in-house deployment expenses, cost per user, and IT personnel requirements. Furthermore, cloud-based LIS solutions do not necessitate upfront capital investments in hardware, alleviating financial burdens on healthcare organizations and facilitating secure and expedient data transfer.

Key Market Drivers

Rapid Digitalization across Various Sectors around the World

The growing demand for increased productivity across enterprises, coupled with the rising focus on regulatory compliance and error prevention, is expected to drive the growth of the global laboratory information management system (LIS) market. LIS services offer enhanced visibility and control necessary for managing the complexities of patient data in the healthcare industry. It is worth noting that enterprises worldwide encountered an average of 20 security breaches in 2020, with this number projected to increase during the forecast period. Consequently, this is anticipated to significantly fuel the growth of the global market.

Furthermore, digitalization has been steadily increasing across various sectors and is expected to continue its upward trajectory in the coming years. The expenditure on digitalization is also experiencing rapid growth. For instance, it is predicted that approximately 65% of the world's Gross Domestic Product (GDP) will be digitized by 2022, and digitally transformed organizations are projected to contribute more than half of the global GDP by 2023, amounting to nearly USD 54 trillion. Therefore, this factor is estimated to be a major driver for the growth of the global laboratory information management system (LIS) market.

Surge in Demand for Lab Automation

The demand for laboratory information systems (LIS) is being fueled by the growing adoption of lab automation and advancements in R&D labs, particularly in the pharmaceutical and biotechnological sectors. Lab automation plays a crucial role in reducing human errors associated with repetitive tasks like pipetting and plate movement, thus enhancing accuracy. Moreover, the high efficiency of laboratory informatics products is driving the market for laboratory information systems (LIS).

A survey conducted in 2020 by Astrix Technologies LLC, a professional healthcare IT

service provider, revealed that 61% of laboratory information management system (LIS) users have witnessed profitability through the elimination of manual operations, 57% have improved their sample management approach, and 46% have experienced a significant rise in productivity within their laboratory settings.

According to the World Health Organization's (WHO) 2019 report on patient safety and risk management services, outpatient care settings in the U.S. reported a 5% rate of diagnostic errors, with diagnostic errors accounting for 6% to 17% of all harmful events in hospitals. This data indicates the potential for growth in the global laboratory information systems market. Governments are actively supporting the adoption of IT solutions and products in healthcare through various initiatives. Additionally, the increasing need to control rising healthcare costs is expected to drive the global laboratory information systems (LIS) market in the forecast period.

Large-scale Implementation of Laboratory Information Systems

The growing accessibility of advanced healthcare in hospitals is a significant driver for the demand of Laboratory Information Systems (LIS). This can be attributed to improved cost management, efficient manpower allocation, automation of clinical testing for faster results, and smoother software implementation in privately owned hospitals. The demand for LIS is particularly high in smaller hospitals across the United States.

Engaging patients as active participants in their care is a crucial strategy to enhance overall healthcare outcomes. Patients should have the ability to access and share their health information. Currently, there is an increasing desire among patients to have access to their health-related documents. This growing demand is expected to fuel the adoption of LIS in hospitals and clinics in the near future. According to the Health Insurance Portability and Accountability Act (HIPAA), patients have the right to request and receive a copy of their completed test reports from laboratories within 30 days.

The rising competition among hospitals to deliver quality care has resulted in a heightened demand for LIS. This is because LIS enables systematic documentation, eliminates paperwork, and reduces the chances of errors associated with clinical test report writing. Additionally, LIS serves as a decision support system, enhancing decision-making in clinical workflows. These advancements contribute to improved healthcare quality in hospitals and clinics, leading to an increased demand for LIS software and services in these healthcare facilities.

Increasing Demand for Compliance with Regulations and Quality Control

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In an increasingly regulated healthcare environment, laboratories are stringent in their adherence to regulatory compliance and quality control standards. The Laboratory Information System (LIS) plays a pivotal role in ensuring regulatory compliance by facilitating process standardization, document tracking, and audit trail generation. Moreover, it enables seamless integration with electronic medical records (EMR) systems, empowering healthcare providers to access crucial laboratory data and improve patient care outcomes. As laboratories strive to maintain high-quality standards and meet regulatory requirements, the demand for innovative LIS solutions continues to grow.

Key Market Challenges

Integration with Existing Infrastructure and Systems

Integration of the Laboratory Information System (LIS) with current laboratory systems and infrastructure represents a significant hurdle that organizations need to address. Many laboratories have already implemented various systems, including laboratory apparatus, electronic health records (EHR), and billing systems. It is crucial to ensure seamless interoperability and smooth data exchange between the LIS and these existing systems. This can be a complex and demanding task, requiring careful selection of a LIS solution that prioritizes compatibility and robust integration capabilities. By overcoming this obstacle and establishing a well-integrated LIS, laboratories can streamline their operations, enhance efficiency, and improve overall patient care.

Data Security and Privacy Issues

In the current digital age, where data privacy and security are of the utmost significance, it is crucial to prioritize the protection of sensitive information. Laboratory information systems (LIS) play a vital role as they store not only patient data but also other private information. The potential consequences of data intrusions are far-reaching, including not only legal penalties but also reputational harm to organizations.

To mitigate these risks, organizations must ensure that the implemented LIS not only complies with all applicable data privacy regulations but also incorporates robust security measures. These security measures should encompass encryption protocols, access controls, and regular security audits to safeguard sensitive data from unauthorized access or breaches. By prioritizing data privacy and implementing

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stringent security measures, organizations can instill confidence in their stakeholders and demonstrate their commitment to protecting sensitive information in an increasingly interconnected digital landscape.

Key Market Trends

Growing Demand for Cloud-Based LIS Solutions

One key trend in the global LIS (Laboratory Information Management System) market is the growing demand for cloud-based LIS solutions. These solutions, hosted on the cloud, offer numerous advantages to laboratories in today's digital age. Cloud-based LIS solutions provide easy accessibility to data and functionalities, allowing users to access and manage laboratory information from anywhere at any time. This flexibility is particularly beneficial for laboratories with multiple locations or for professionals who need to work remotely.

Cloud-based LIS solutions offer scalability. As laboratory needs change and grow, these solutions can easily accommodate expanding data storage requirements, user accounts, and analytical workflows. In addition, using cloud-based LIS solutions can lead to reduced maintenance costs. With traditional on-premises systems, laboratories often need to invest in hardware infrastructure, software updates, and maintenance. Cloud-based solutions eliminate the need for such investments, as the service provider takes care of infrastructure management and software updates. The increasing demand for cloud-based LIS solutions is driven by their easy accessibility, scalability, reduced maintenance costs, and suitability for remote work and virtual collaborations. As laboratories continue to embrace digital transformation, cloud-based LIS solutions are becoming a preferred choice for efficient and effective laboratory information management.

Growing Use of Artificial Intelligence (AI) And Machine Learning (ML) In Medical Devices

One of the prominent trends in the global LIS market is the integration of Artificial Intelligence (AI) and Machine Learning (ML) technologies in LIS solutions. This integration brings numerous benefits to laboratories by automating routine tasks like sample tracking and data analysis, resulting in improved accuracy and efficiency in laboratory workflows. Moreover, AI and ML algorithms enable laboratories to analyze large datasets, uncover hidden patterns, and identify trends that would be challenging to detect through manual analysis alone. By harnessing the power of AI and ML, LIS

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solutions empower laboratories to optimize their operations and make data-driven decisions for enhanced productivity and scientific insights.

Segmental Insights

Component Insights

Based on the component, the services segment has emerged as a significant contributor to the dollar list market, driving the growth of the system. The global demand for laboratory information management systems has played a vital role in generating substantial revenue over time. The increasing need to maintain integrated data and information from laboratory systems has led to a rise in demand for well-equipped laboratory information management systems. These systems effectively organize records by sorting essential data from unnecessary information, offering efficient data management solutions. The validation process is facilitated by artificial intelligence, aligning information with business strategies.

A robust laboratory information management system provides essential support by effectively managing and organizing data received by laboratory management. The market for solutions has witnessed substantial growth due to the outsourcing trend in various business sectors, contributing to the revenue generated by laboratory information management systems. The software system has also experienced significant advancements, enabling businesses to maintain digital records within limited space.

Delivery Mode Insights

Based on the delivery mode segment, the cloud-based product segment has emerged as the largest market, driven by the growing demand for this technology. This segment has experienced tremendous growth due to recent business strategies. A cloud-based setup offers businesses multiple accessible options for their data and information through advanced technology. Modern technological systems provide various platforms that grant access to stored data and information. Multiple Internet sites have been established to guide businesses in retrieving the required data and information. Multiple branches are connected to the main server, which contains the necessary data or information that can be accessed through online search. A cloud-based system allows businesses to store a vast amount of data on the Internet, eliminating concerns about space and accessibility. This proves to be a highly profitable solution for large companies. Utilizing a cloud-based system helps major organizations reduce overall

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expenditure on human intelligence, which has become increasingly costly in today's market. Storing information on the cloud enables significant space savings that can be utilized for other productive purposes within the organization. The on-premises segment has also shown notable growth over time, providing enhanced accessibility to major companies during technical glitches or failures.

Regional Insights

North America, comprising the United States and Canada, boasts a robust healthcare infrastructure and a forward-thinking approach to incorporating technology. These factors have significantly contributed to the region's dominance in the Laboratory Information Systems Market. Let us delve deeper into the reasons behind North America's unparalleled position in this field.

It is imperative to underscore the extensive prevalence of advanced healthcare institutions and laboratories across North America. Throughout the region, esteemed hospitals, research centers, and diagnostic laboratories have consistently invested in cutting-edge technology to enhance their operations. Consequently, the widespread adoption of LIS solutions has propelled market expansion.

Furthermore, North America's focus on research and development (R&D) has been instrumental in the advancement of LIS technologies. The region is home to several prestigious universities and research institutions that continuously strive to develop innovative healthcare solutions. These institutions collaborate closely with industry leaders to create LIS applications tailored to the specific requirements of laboratories. This commitment to innovation has positioned North America at the forefront of the Laboratory Information Systems Market.

Key Market Players

Sysmex Corporation

Total Specific Solutions (TSS)

Roper Technologies (Sunquest Information Systems, Inc)

XIFIN Inc

Orchard Software Corporation

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Cerner Corporation

Comps Pro Med Inc

Epic Systems Corporation

LabWare, Inc.

Cirdan Ltd

Report Scope:

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

Laboratory Information System Market, By Product:

Standalone LIS

Integrated LIS

Laboratory Information System Market, By Component:

Services

Software

Laboratory Information System Market, By Delivery Mode:

On-Premises

Cloud-Based

Laboratory Information System Market, By End User:

Hospital Labs

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- Independent Labs
- Physician Office Laboratories
- Others

Laboratory Information System Market, By Region:

- North America
  - United States
  - Canada
  - Mexico
- Europe
  - France
  - United Kingdom
  - Italy
  - Germany
  - Spain
- Asia-Pacific
  - China
  - India
  - Japan
  - Australia
  - South Korea

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South America

Brazil

Argentina

Colombia

Middle East & Africa

South Africa

Saudi Arabia

UAE

Kuwait

Turkey

Egypt

Competitive Landscape

Company Profiles: Detailed analysis of the major companies present in the Global Laboratory Information System Market.

Available Customizations:

Global Laboratory Information System market report with the given market data, Tech Sci 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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