

# **South & Central America Lab Automation Market Size and Forecast (2021 - 2031), Regional Share, Trend, and Growth Opportunity Analysis Report Coverage: By Type (Equipment and Software), Equipment (Automated Workstations, Liquid Handling Systems, Robotic Systems, Microplate Readers, Automated Storage and Retrieval Systems (ASRS), and Other Equipment), Application (Clinical Diagnostics, Drug Discovery, Proteomics Solutions, Genomics Solutions, and Other Applications), and End User (Hospitals and Diagnostic Centers, Pharmaceutical Companies, Contract Research Organizations (CROs), and Educational and Research Institutions)**

<https://marketpublishers.com/r/S57641A55912EN.html>

Date: November 2025

Pages: 208

Price: US\$ 3,450.00 (Single User License)

ID: S57641A55912EN

## **Abstracts**

The South & Central America Lab Automation Market is projected to grow significantly, reaching an estimated US\$ 349.9 million by 2031, up from US\$ 228.5 million in 2024, with a compound annual growth rate (CAGR) of 6.5% anticipated from 2025 to 2031.

## **Executive Summary and Market Analysis**

The lab automation landscape in South & Central America is primarily segmented into Brazil, Argentina, and the Rest of the region. While the public sector continues to dominate healthcare delivery, the private sector is rapidly expanding, particularly in densely populated urban areas. The adoption of lab automation technologies is

increasingly seen as a solution to workforce shortages, the need for faster diagnostic turnaround times, and the standardization of laboratory processes. Major private diagnostic providers, including Dasa and Grupo Fleury in Brazil, and Synlab in Colombia and Chile, are implementing comprehensive lab automation platforms that integrate pre-analytical, analytical, and post-analytical processes.

Key players such as Roche Diagnostics, Siemens Healthineers, Beckman Coulter, and Abbott have established robust distribution and service networks in the region. For instance, Roche's cobas modular systems and Beckman Coulter's DxA workflow automation solutions are tailored to meet the high-volume testing demands of centralized laboratories.

Despite the growth potential, several challenges hinder the pace of automation adoption, particularly in smaller or rural laboratories. These include budget constraints, uneven access to healthcare, limited technical expertise, and a reliance on imported technologies. However, government initiatives aimed at enhancing diagnostic capabilities, especially in infectious disease management and maternal health, are helping to bridge these gaps. Support from international organizations such as the WHO and PAHO further bolsters these efforts, indicating a promising long-term outlook for scalable and cost-effective lab automation solutions that cater to diverse healthcare systems and infrastructure levels.

## **Strategic Insights**

### **Market Segmentation Analysis**

The South & Central America Lab Automation Market is categorized by type, equipment, application, and end user:

**By Type:** The market is divided into Equipment and Software, with Equipment holding the largest market share in 2024.

**By Equipment:** This segment includes Automated Workstations, Liquid Handling Systems, Robotic Systems, Microplate Readers, Automated Storage and Retrieval Systems (ASRS), among others, with Automated Workstations leading the market.

**By Application:** The market is segmented into Clinical Diagnostics, Drug Discovery, Proteomics Solutions, Genomics Solutions, and others, where

Clinical Diagnostics holds the largest share.

**By End User:** The end users include Hospitals and Diagnostic Centers, Pharmaceutical Companies, Contract Research Organizations (CROs), and Educational and Research Institutions, with Hospitals and Diagnostic Centers dominating the market.

## **Market Outlook**

Historically, one of the significant challenges in laboratory automation has been the lack of standardized communication protocols between devices from different manufacturers, leading to costly and time-consuming custom integration efforts. The Standardization in Lab Automation (SiLA) consortium addresses this issue by developing open-source interface standards, notably SiLA 2, which facilitates seamless communication between instruments, software, and Laboratory Information Management Systems (LIMS). This standardization reduces technical barriers to integration, allowing laboratories to adopt a plug-and-play approach to automation, enhancing flexibility and scalability tailored to specific workflows.

The push for interoperability simplifies implementation and positions laboratories to embrace the next generation of smart, connected environments. In an era where precision medicine, big data analytics, and real-time diagnostics are transforming healthcare and life sciences, interoperability is crucial. Standardized systems enable better data exchange, efficient device orchestration, and easier integration of artificial intelligence (AI) and machine learning (ML) tools for predictive analytics and workflow optimization. Furthermore, SiLA 2 supports compliance with global regulatory standards, enhancing traceability, auditability, and data integrity—critical factors in clinical, pharmaceutical, and biotechnological settings. As laboratories seek agile, future-ready automation platforms, the adoption of standardized and interoperable systems is expected to create significant market opportunities.

## **Country Insights**

By country, the South & Central America Lab Automation Market is segmented into Brazil, Argentina, and the Rest of South & Central America, with Brazil holding the largest market share in 2024. Brazil, with a population exceeding 200 million and a dual public-private healthcare system, faces pressure to manage high patient volumes while ensuring quality and speed. This has led to increased adoption of automated solutions

in clinical chemistry, molecular diagnostics, and microbiology. Major diagnostic chains like Dasa, Grupo Fleury, and Sabin Medicina Diagn?stica are heavily investing in lab automation systems to enhance efficiency and scale operations, particularly in urban centers like S?o Paulo and Rio de Janeiro, while also expanding into underserved regions.

Global companies such as Roche Diagnostics, Abbott, Siemens Healthineers, and Beckman Coulter provide end-to-end automation platforms, with Roche's cobas systems and Abbott's Alinity series being particularly popular among high-volume laboratories. Despite facing challenges such as import taxes, regulatory delays, and economic fluctuations, Brazil's lab automation market continues to grow, driven by digitization, public health investments, and a renewed focus on lab resilience in the post-pandemic landscape.

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