

# **Laboratory Software Market Size, Share and Growth Outlook 2026: By Component (Software, Services, Hardware), By Deployment, By Type, By End-User, Companies to 2034.**

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## **Abstracts**

The global Laboratory Software Market size is forecast to increase from \$7.54 Billion in 2026 to \$16.57 Billion in 2034 at a CAGR of 10.34% between 2026 and 2034.

The Laboratory Software market report provides detailed analysis and outlook of Laboratory Software segments including By Component (Software, Services, Hardware), By Deployment (Cloud-based, On-premise), By Type (Laboratory Information Management System (LIMS), Electronic Lab Notebook (ELN), Scientific Data Management System (SDMS), Laboratory Execution System (LES), Chromatography Data System (CDS), Enterprise Content Management (ECM), Electronic Data Capture (EDC) and Clinical Data Management Systems (CDMS)), By End-User (Hospital Laboratories, Independent Laboratories, Physician Office Laboratories, Pharmaceutical and Biotechnology Companies, Academic and Research Institutes, Contract Research Organizations (CROs)) across global and regional markets. Further, analysis and outlook across 21 countries in North America, Europe, Asia Pacific, Middle East, Africa, and South America are provided in the study.

### **Laboratory Software Industry Overview**

#### **Artificial Intelligence and Cloud Platforms Redefine Laboratory Software Ecosystems**

The Laboratory Software industry is undergoing a major transformation as research organizations, pharmaceutical companies, biotechnology firms, and testing laboratories increasingly adopt artificial intelligence, cloud-native architectures, and automated data

management platforms. Laboratory Information Management Systems, Electronic Laboratory Notebooks, scientific data management solutions, and workflow automation software are evolving into intelligent digital ecosystems capable of orchestrating complex laboratory operations. Growing volumes of scientific data, increasing regulatory requirements, and the need for accelerated research timelines are driving demand for software platforms that combine automation, analytics, interoperability, and real-time decision support. Modern laboratory software is increasingly positioned as a central hub connecting instruments, researchers, computational models, manufacturing systems, and external service providers within a unified digital environment.

### AI Agents and Digital Twins Enable Autonomous Laboratory Operations

A major industry trend involves the deployment of artificial intelligence directly within laboratory management workflows. LabVantage Solutions introduced LabVantage CORTEX, a cloud-native Software-as-a-Service platform designed to extend traditional LIMS capabilities through autonomous AI agents, predictive quality control, and advanced automation functions. Operating within a multi-tenant architecture, the platform utilizes AI-driven workflows and Internet of Things digital twins to support environmental monitoring and complex data processing activities. These technologies reflect the growing demand for intelligent laboratory systems capable of proactively identifying quality issues, automating repetitive tasks, and generating operational insights. As laboratories seek greater efficiency and scalability, AI-powered software platforms are becoming increasingly important for managing complex scientific operations and improving data-driven decision-making.

### Digital Integration Connects Scientific Design, Computing, and Manufacturing

Laboratory software providers are increasingly building end-to-end digital infrastructures that connect computational research with experimental execution. Benchling expanded its platform through the introduction of Benchling Inference, developed in partnership with Baseten to provide scalable computing resources capable of supporting large-scale scientific AI workloads and high-volume in silico modeling. The platform allows biopharmaceutical organizations to rapidly scale computational capacity while maintaining secure deployment environments. Benchling also introduced One-Click Ordering functionality, enabling direct digital connections between design workflows and external service providers such as Twist Bioscience, Adaptyv, and Ginkgo Bioworks. Simultaneously, Siemens strengthened its scientific software capabilities through the acquisition of Dotmatics, integrating scientific data management and AI-native analytics

into its broader digital twin and Product Lifecycle Management portfolio. These developments highlight the industry's movement toward fully connected digital ecosystems that link scientific discovery, laboratory execution, and commercial manufacturing processes.

## Laboratory Software Market Trends, Growth Drivers, Competitive Landscape, and Future Opportunities

The global Laboratory Software market is witnessing increasing investments in innovation, product development, digital transformation, artificial intelligence integration, healthcare infrastructure expansion, and strategic partnerships across developed and emerging economies. Key Companies in the industry include- Thermo Fisher Scientific Inc., LabWare, Inc., LabVantage Solutions, Inc., Benchling Inc., Agilent Technologies, Inc., STARLIMS (Abbott Laboratories), Dassault Systèmes (BIOVIA), PerkinElmer, Inc., LabLynx, Inc., Autoscribe Informatics (Xybion Corporation). The Laboratory Software market is expected to remain one of the most closely watched segments in the global healthcare industry, with companies focusing on niche market segments. As healthcare systems across the US, Europe, Asia-Pacific, Latin America, and Middle East & Africa continue to prioritize efficiency, access, and innovation, the Laboratory Software industry outlook remains shaped by rising healthcare expenditure, demographic change, digital transformation, and product innovation.

The report provides detailed market analysis including-

- Growth Laboratory Software Market size outlook across 3 scenarios- High growth, reference, and Low growth cases

- Market Trends, Drivers, Potential Opportunities, and Challenges faced by Laboratory Software companies

- Porter's Five forces analysis- Bargaining power of buyers and sellers, Threat of Substitutes and new entrants, and Intensity of competitive rivalry

- Detailed SWOT Analysis of global and regional Laboratory Software markets

- Competitive analysis including business description, product analysis, and financial profiles

- Key country specific analysis detailing key factors shaping the short-term and

long-term outlook

Recent industry developments and news including mergers, acquisitions, product launches, expansions, and company announcements

## Laboratory Software Market Competitive Benchmarking and Company Analysis

Leading companies in Laboratory Software industry include- Thermo Fisher Scientific Inc., LabWare, Inc., LabVantage Solutions, Inc., Benchling Inc., Agilent Technologies, Inc., STARLIMS (Abbott Laboratories), Dassault Systèmes (BIOVIA), PerkinElmer, Inc., LabLynx, Inc., Autoscribe Informatics (Xybion Corporation). The Laboratory Software market remains moderately to highly fragmented, with competition expected to intensify as companies accelerate investments in innovation, geographic expansion, strategic partnerships, and portfolio diversification through 2034. In developed markets such as the United States, Germany, France, the United Kingdom, and Canada, competition is increasingly centered on innovation, reimbursement positioning, and value-based healthcare solutions. Meanwhile, emerging markets including China, India, Brazil, and countries across the Middle East and Africa continue to present significant opportunities for expansion due to rising healthcare expenditure, growing patient populations, and increasing access to healthcare services.

What to expect in US Laboratory Software Markets in 2026 and beyond- Market Size, Share, Growth Rate, and Forecast to 2034

The US healthcare expenditure is forecast to reach \$8.2 Trillion in 2034 from \$5.5 Trillion in 2026 based on the National Health Expenditure Accounts (NHEA) data. With an aging population, rising chronic disease burden, and increasing migration toward minimally invasive and outpatient care, the Laboratory Software market remains one of the strongest-performing segments in the country.

The US Laboratory Software Companies are opting new business models, optimized pricing models, industry partnerships, and AI-enabled back end transformations to enhance efficiency and cost management. The US Laboratory Software market faces successive waves of challenging trends, with strong opportunities across select segments. The CMS plan to implement Medicaid from 2027 is driving states to build eligibility verification systems throughout 2026. Looking ahead to 2034, we anticipate stronger results underpinned by opportunities exist across Laboratory Software industry. On the medical device front, over 7,000 device manufacturers continue to gain from

increasing demand from demand for implantable devices, surgical instruments, monitoring equipment, and diagnostic systems.

Canada- Proximity to the US and healthcare similarities to EU5 countries fuel sales of Canadian Laboratory Software markets

Canada's strong Laboratory Software sales performance is underpinned by an aging population and a well-developed healthcare infrastructure. Steady growth in new brand spending in rural and urban locations fuel the long-term prospects of small and medium-sized enterprises across medical, diagnostic, and therapeutic devices. The Canadian Laboratory Software market presents significant opportunities for U.S. exporters of medical devices, with the U.S. being Canada's largest trading partner for this sector. Potential advantages including specialized materials, advanced manufacturing techniques, and digital technologies support the launch of new products in the country.

Germany Laboratory Software Trends and Perspectives to 2034- Financial sustainability, hospital restructuring, demographic pressures, and digitization of care delivery continue to shape the German healthcare industry.

Germany continues to remain the largest Laboratory Software market in Europe, driven by over €600 Billion healthcare expenditure, €12 Billion medical device R&D expenditure, statutory health insurance system covering 90% German population, nationwide rollout of the electronic patient record (ePA), and large-volume of Laboratory Software population. In particular, Research and development in Germany fuels the commercialization of cutting-edge technologies. Companies across the Germany Laboratory Software industry value chain are focusing on both domestic markets and exports. The country is also driving digital adoption with the Hospital Future Act driving hospitals to upgrade their information systems by 2027. Over the forecast period, aging population, rising healthcare costs, and increasing procedural volumes drive the Laboratory Software market outlook.

France Market Size, Growth Rate, and Forecast Analysis to 2034- Universal healthcare system, high public healthcare expenditure, and strong government support Laboratory Software sales through 2034

France Laboratory Software companies are emphasizing on opportunities for rapid, at-scale innovation to boost profitability over the long-term. The country's National Health Insurance spending target (ONDAM) estimates 3.7% growth in the country's healthcare expenditure. Over the forecast period, expenditure control measures, chronic disease

management initiatives, workforce reforms, and efforts to improve system efficiency drive the long-term prospects.

The biggest 2026 policy frame is the PLFSS 2026. The law sets the Maladie branch spending target at €271.4 billion for 2026 and fixes the ONDAM at €117.5 billion for city care, €112.8 billion for health establishments, and €18.3 billion for elderly-care establishments and services. France's market is also being pulled by demographics. INSEE estimates that on 1 January 2026 France had 69.1 million inhabitants, with 22% aged 65 or over. INSEE also reported that 2025 births were 645,000 and deaths were 651,000, producing a negative natural balance of about 6,000 for the first time since the end of the Second World War.

**UK Laboratory Software Market Size, Share, and Growth Projections to 2034- Rapid growth driven by new and existing brands across the industry value chain**

Small high-need consumer segments remain key priority of Laboratory Software distributors in the UK industry. Continuous launch of new products coupled with high expenditures support the market outlook. The UK Government financing remains the dominant funding source at 81.3% of total healthcare expenditure, or ?280 billion in 2025. According to the ONS, total healthcare spending grew 7.7% nominally and 3.9% in real terms from 2024 to 2025. Similarly, out-of-pocket spending was ?49 billion (14.1%) and voluntary health insurance was ?9.5 billion (2.8%). The market is driven by rapid digital adoption with NHS England's plan to give more than 500,000 staff access to new AI tools.

**China Laboratory Software Market Growth Drivers, Revenue Trends, and Forecast- Medical insurance coverage is rapidly expanding over the past few years**

China Laboratory Software market is undergoing a structural shift from hospital-centric care toward a more integrated system emphasizing primary care, outpatient services, and long-term care. Chinese local players are emerging as a strong pillar of Laboratory Software industry, offering opportunities for both competition and partnership. Over the forecast period, new and innovative product launches remain key elements driving market outlook. China's healthcare industry is increasingly centered on expanding healthcare capacity, improving access to advanced treatments, and reducing dependence on imported technologies.

The National Healthcare Security Administration reported that by end-2024, China's basic medical insurance covered 1.32662 billion people and the coverage rate was



95%. Regional disparities in consumer spending trends continue to become more pronounced in the Chinese Laboratory Software industry. Over the forecast period, demand will keep shifting toward geriatrics, chronic disease management, rehabilitation, long-term care, and outpatient care, while pricing pressure will remain intense in drugs and consumables because reimbursement.

India Laboratory Software Market Landscape: Current Size and Long-Term Growth Outlook - Increased pricing pressures in US market is encouraging domestic vendors to expand across India

Indian Laboratory Software market is witnessing the rapid emergence of an ecosystem that brings together diverse companies across the industry value chain. Further, large-scale healthcare public and private investments and a steady growth in chronic conditions is driving sales of pharmaceuticals and medical devices. Further, non-retail channel is experiencing volume decrease and patients are migrating to the retail. Indian medical device firms are also combining precision engineering with lower labor costs to make world-class diagnostics, robotics, and critical care devices.

Brazil Laboratory Software market remains price-driven, with products domestically manufactured and accessibility offering potential opportunities

Healthcare expenditure in Brazil exceeds 10% of GDP, with the country among the highest healthcare spenders in Latin America. ANS reported 53.2 million medical-plan beneficiaries in December 2025, while IBGE projects a steady rise in older-age cohorts, with people aged 60+ already representing about 23% of the population. The price sensitive market access is broad through the public system, private coverage adds a sizeable premium layer, and reimbursement, procurement, and hospital efficiency remain key buying drivers.

Middle East and Africa Laboratory Software Industry Trends and Perspectives to 2034

According to the World Bank, the Middle East and North Africa population exceeds 500 million, while Sub-Saharan Africa's population exceeds 1.2 billion, making the broader MEA region one of the fastest-growing healthcare demand centers globally. The GCC countries including Saudi Arabia, United Arab Emirates, Qatar, and Kuwait continue to account for a disproportionately large share of regional healthcare spending. Government-led programs such as Saudi Arabia's Vision 2030 are accelerating investments in hospital infrastructure, private-sector participation, medical technology adoption, and healthcare digitalization. On the other hand, South Africa, Egypt, Nigeria,

and Kenya remain key healthcare markets due to their large populations, expanding private healthcare sectors, and growing investments in healthcare delivery systems.

## Laboratory Software Market Segmentation

### By Component

Software

Services

Hardware

### By Deployment

Cloud-based

On-premise

### By Type

Laboratory Information Management System (LIMS)

Electronic Lab Notebook (ELN)

Scientific Data Management System (SDMS)

Laboratory Execution System (LES)

Chromatography Data System (CDS)

Enterprise Content Management (ECM)

Electronic Data Capture (EDC) and Clinical Data Management Systems (CDMS)

### By End-User

Hospital Laboratories



Independent Laboratories

Physician Office Laboratories

Pharmaceutical and Biotechnology Companies

Academic and Research Institutes

Contract Research Organizations (CROs)

Leading Companies in Laboratory Software Industry (2026)

Thermo Fisher Scientific Inc.

LabWare, Inc.

LabVantage Solutions, Inc.

Benchling Inc.

Agilent Technologies, Inc.

STARLIMS (Abbott Laboratories)

Dassault Syst?mes (BIOVIA)

PerkinElmer, Inc.

LabLynx, Inc.

Autoscribe Informatics (Xybion Corporation)

Countries Included

North America- US, Canada, Mexico

Europe- Germany, France, UK, Spain, Italy, Nordics, Others

Asia Pacific- China, India, Japan, South Korea, Australia, Southeast Asia,

Others

Latin America- Brazil, Argentina, Others

Middle East and Africa- Saudi Arabia, UAE, Other Middle East, South Africa,  
Other Africa

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