

Middle East & Africa Laboratory Information System (LIS) Market Forecast to 2028 - COVID-19 Impact and Regional Analysis - by Product (Standalone LIS and Integrated LIS), Delivery Mode (Cloud-Based Delivery Mode, Web-Based Delivery Mode, and On-Premises Delivery Mode), Component (Software and Services), and End User (Hospital Labs, Independent Labs, and Physician Office Labs)

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Report description:

The laboratory information system (LIS) market in Middle East & Africa is expected to grow from US\$ 44.51 million in 2022 to US\$ 72.26 million by 2028. It is estimated to grow at a CAGR of 8.4% from 2022 to 2028.

Emerging Markets Rising Adoption of Automation in Laboratories

Laboratory automation is emerging as an approach to minimize human involvement in laboratory processes. The automation of routine laboratory procedures with the help of dedicated workstations and system software helps to increase laboratory efficiency and enables researchers to concentrate on important tasks along with avoiding human errors. Laboratories are increasingly adopting laboratory information system (LIS) to maintain stringent regulatory compliance, uplift efficiency and productivity, and drive data security and integrity. According to a study published in the Journal of Lab Automation, the error incidences in fully automated, semi-automated, and manual operations are 1-5%, 1-10%, and 10-30%, respectively. The growing use of digital workstations, automated analyzers, and total laboratory automation (TLA) allows laboratory personnel to reassign activities and contribute a greater value to operations. Moreover, high volumes of data generated by laboratory systems is triggering the demand for effective data processing, analysis, and sharing methods, thereby highlighting the need of efficient and cost-effective solutions such as the LIS.

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Laboratory management departments are facing many challenges with a rising population submitting larger number of samples to laboratories and a lack of personnel to process those samples. These challenges are compelling them to maintain their laboratory operations, as laboratories have to maintain control over the influx of samples as well as find the way to improve workflow to deliver patient results in a timely manner.

Further, growing demand for data integration is another factor contributing to the laboratory information system (LIS) market growth. With pharmaceutical and biotechnological industries spending huge amounts on research and development activities, the scientific communities are generating huge volumes of data. The appropriate processing and interpretation of the collected data requires data integration solutions.

For instance, in 2000, Quest Diagnostics, a prominent independent testing laboratory, started providing their consumers with a direct access to test results through the TheDailyApple.com website owned and managed by Caresoft Inc. It offers direct-to-consumer test result, thereby ensuring confidentiality and anonymity of patients. Manual processes and paper records may allow unauthorized access to data, which increases the chances of data manipulation, and hence, managing data integrity is a big challenge faced by laboratories dependent on manual operations. Increasing adoption of electronic health record (EHR) systems in outpatient clinics and hospitals, to mitigate the risks associated with manual operations, would fuel the demand for LIS. The systems also allow the use of laboratory data to offer safe and high-quality patient care. Thus, the growing focus on effective clinical workflow management, leading to the rise in automation of laboratory processes, is driving the laboratory information system (LIS) market growth.

Market Overview

The Middle East & Africa region includes Saudi Arabia, South Africa, the UAE, and the Rest of the Middle East & Africa. The region is expected to experience a steady growth rate of 8.4% from 2022 to 2028. Among the countries included in the Middle East & Africa region, Saudi Arabia held the largest market share in 2021, followed by South Africa and the UAE. Saudi Arabia is also estimated to be the fastest-growing country in the region. Saudi Arabia is one of the important countries in the Middle Eastern region with significant scope for clinical research. The healthcare system in the country is developing at a rapid pace as well as an increasing number of sponsors are developing medical and research teams in the country. Additionally, the country has many clinical trials in progress and requires management, testing, and consulting solutions for trials at various stages, which the clinical research organizations can provide. For instance, according to clinicaltrials.gov, about 121 studies were recruited in Saudi Arabia until August 2018. Moreover, the Saudi Arabian government encourages private sectors to take up a vital role in healthcare by developing and delivering innovative models of care. This is helpful for LIS to get accessible sponsors, and thus the healthcare policies favoring private sectors are expected to drive the growth of the LIS market in Saudi Arabia.

Middle East & Africa Laboratory Information System (LIS) Market Revenue and Forecast to 2028 (US\$ Million)

Middle East & Africa Laboratory Information System (LIS) Market Segmentation

The Middle East & Africa laboratory information system (LIS) market is segmented into product, delivery mode, component, end user, and country.

Based on product, the market is bifurcated into standalone LIS and integrated LIS. The standalone LIS segment held the larger market share in 2022.

Based on delivery mode, the market is segmented into cloud-based delivery mode, web-based delivery mode, and on-premises delivery mode. Cloud-based delivery mode segment held the largest market share in 2022.

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Based on component, the market is segmented into software and services. Software segment held the larger market share in 2022.

Based on end user, the market is segmented into hospital labs, independent labs, and physician office labs. The hospital labs segment held the largest market share in 2022.

Based on country, the market is segmented into Saudi Arabia, South Africa, the UAE, and the Rest of Middle East & Africa. Saudi Arabia dominated the market share in 2022.

CompuGroup Medical; Illumina, Inc.; LabLynx, Inc.; LabVantage Solutions, Inc.; McKESSON CORPORATION; and Thermo Fisher Scientific Inc. are the leading companies operating in the laboratory information system (LIS) market in the region.

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