

Global Laboratory Equipment And Disposables - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2026 - 2031)

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Report description:

Global Laboratory Equipment And Disposables Market Analysis

The laboratory equipment and disposables market size in 2026 is estimated at USD 40.85 billion, growing from 2025 value of USD 37.84 billion with 2031 projections showing USD 59.93 billion, growing at 7.96% CAGR over 2026-2031. Sustained growth stems from rising biopharma R&D outlays, fast-growing genomics workflows that require high-throughput automation, and tighter contamination-control protocols that favor single-use supplies. Vendors are adding AI-enabled predictive maintenance to maximize instrument uptime, while green-lab certification programs pressure laboratories to cut energy and material waste. Supply-chain resilience initiatives and reshoring policies continue to influence purchasing decisions, especially in North America and Europe, whereas Asia-Pacific gains momentum from government-backed biotech investments. Intensifying competition encourages large incumbents to pursue scale economies through M&A, while niche entrants differentiate on modular robotics and sustainability services.

Global Laboratory Equipment And Disposables Market Trends and Insights

Growing Biopharma R&D Expenditure

Pharmaceutical R&D spending reached USD 288 billion in 2024 and is projected to climb toward USD 340 billion by 2030, sustaining strong demand for advanced analytical instrumentation. Venture funding in biotech surpasses USD 50 billion annually in the United States, while Europe's pipeline remains robust, reinforcing long-term capital flows into laboratory infrastructure.

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Increased biologics approvals by the FDA validate greater instrument utilization and recurring consumables sales. As pipelines diversify into cell- and gene-therapy modalities, laboratories upgrade to closed-system isolators and digital documentation platforms, thereby deepening wallet share for integrated vendors.

Rapid Expansion of High-Throughput Sequencing Labs

Global build-out of next-generation sequencing facilities accelerates demand for genomic sample preparation, microfluidic chips, and cloud-based data pipelines. The life-science tools market is forecast at a 10.9% CAGR, with sequencing workflows as a primary catalyst. Beckman Coulter's TruSight Oncology 500 and QIAGEN's forthcoming QIASymphony Connect exemplify automation aimed at reducing hands-on time while scaling throughput. China's 14th Five-Year Plan prioritizes genomic capabilities, and regional manufacturers leverage local subsidies to deploy bench-top sequencers. Oncology researchers integrate AI algorithms for variant calling, expanding concomitant demand for high-capacity servers and laboratory information management systems. Overall, sequencing labs act as anchor customers that pull through a broad basket of disposables and capital equipment.

Volatility in Medical-Grade Resin Prices

Sharp swings in polypropylene and PTFE pricing compress margins for consumables makers and force instrument vendors to renegotiate supplier contracts. Chemical-supply bottlenecks stemming from geopolitical tensions have extended lead times and compelled buyers to hold higher safety stocks, raising working-capital needs. Eastman's USD 2.25 billion molecular-recycling investment aims to secure circular feedstocks and mitigate input-cost risk. However, spot-price volatility persists and disproportionately impacts small-volume labs with limited purchasing clout. Budget uncertainty can delay discretionary equipment upgrades and prompt laboratories to re-sterilize glassware, tempering near-term growth in single-use categories of the laboratory equipment and disposables market.

Other drivers and restraints analyzed in the detailed report include:

Surge in Demand for Single-Use Clean-Room Plastics
AI-Enabled Predictive Maintenance of Instruments
Lengthy Validation Cycles for Novel Instrument Platforms

For complete list of drivers and restraints, kindly check the Table Of Contents.

Segment Analysis

Disposables represent the dominant 51.62% slice of the laboratory equipment and disposables market share in 2025, a position underpinned by their single-use sterility and workflow efficiency. The same category is forecast to grow at an 8.53% CAGR to 2031, ensuring sustained revenue momentum that outweighs raw-material cost volatility. Laboratories in biopharma and diagnostics favor ready-to-use pipette tips, filtration assemblies, and micro-fluidic plates that minimize cross-contamination and simplify compliance documentation. Clean-room apparel remains indispensable for aseptic manufacturing, while closed-loop recycling pilots address rising ESG scrutiny.

Laboratory equipment-including analyzers, spectrometers, centrifuges, and incubators-continues to generate steady capital orders as institutions modernize infrastructure with IoT connectivity. Predictive maintenance modules embedded in high-value systems offer recurring-service income streams that compensate for extended replacement cycles. Vendors differentiate through open-architecture software, scalable robotics, and reagent-rental bundles that tie consumables to instrument use. In mature labs, analytics-as-a-service contracts shift budgets from capex to opex, smoothing revenue and supporting the overarching growth trajectory of the laboratory equipment and disposables market.

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The Laboratory Equipment and Disposables Market Report is Segmented by Product Type (Laboratory Equipment, Laboratory Disposables), Application (Clinical Diagnostics, Drug Discovery & Development, and More), End User (Hospitals & Clinics, Pharmaceutical & Biotechnology Companies, and More), and Geography (North America, Europe, and More). The Market Forecasts are Provided in Terms of Value (USD).

Geography Analysis

North America contributes the largest 37.68% revenue slice in 2025 due to sustained biopharma R&D exceeding USD 130 billion and accelerated precision-medicine adoption. The region benefits from clear FDA guidance that reduces procurement risk and from concerted reshoring incentives under the CHIPS & Science Act, which strengthen semiconductor component supply critical for instrument manufacturing. Persistent 13% staffing shortages in clinical labs catalyze automation purchases, solidifying North America's central role in the laboratory equipment and disposables market.

Asia-Pacific is the fastest-expanding territory with a 9.18% CAGR through 2031, propelled by China's generous biotech subsidies under its 14th Five-Year Plan and healthcare-infrastructure projects slated to hit USD 138 billion by 2027. Strategic alliances like Agilent-Sangon Biotech tailor nucleic-acid technologies to domestic requirements, while Japan, South Korea, and Australia sustain demand through advanced clinical research initiatives.

Europe delivers steady mid-single-digit growth amid regulatory harmonization and sustainability imperatives. Germany holds a 21% share and drives innovation in green-lab practices, while EMA's Shortages Monitoring Platform heightens demand for compliance-monitoring instruments. South America and Middle East & Africa remain nascent but attractive, with Brazil and GCC nations investing in public-health labs and academic centers, laying the groundwork for elevated future contributions to the laboratory equipment and disposables market.

List of Companies Covered in this Report:

Thermo Fisher Scientific Danaher Agilent Technologies Merck Roche Beckton Dickinson Sartorius PerkinElmer Bio-Rad Laboratories Eppendorf Bruker Corning 3M GE Healthcare (Cytiva) Waters Corporation Shimadzu Illumina Abbott Laboratories Mettler Toledo Tecan Group

Additional Benefits:

The market estimate (ME) sheet in Excel format
3 months of analyst support

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6.3.3 Agilent Technologies Inc.

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