Lab Automation Companies Compared: Top Vendors & Platforms

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Executive Summary

The laboratory automation market spans four core vendor categories that buyers routinely conflate: liquid handling hardware makers, workcell orchestration software vendors, system integrators, and cloud-lab service providers. Sample and data management platforms are adjacent products, not a core automation category. As of August 2026, the established full-suite hardware vendors profiled here include **Hamilton Company** (privately held, headquartered in Reno, Nevada with additional headquarters in Franklin, Massachusetts and Bonaduz, Switzerland, reporting over 75 years of operation and more than 3,000 employees) (Source: hamiltoncompany.com), **Tecan Group** (founded in 1980 in Hombrechtikon, Switzerland, reporting CHF 934 million in 2024 sales) (Source: tecan.com) (Source: tecan.com), **Beckman Coulter Life Sciences** (a Danaher operating company since 2011, tracing to Arnold O. Beckman's 1935 founding) (Source: danaher.com), **Agilent Technologies**, and **Thermo Fisher Scientific**, whose Momentum scheduling software has been on the market since 2009 with a driver library covering more than 500 instrument types (Source: thermofisher.com). At the accessible end of the market, **Opentrons** currently lists its OT-2 liquid handler starting at $15,950 and its Flex robot starting at $24,950 (Source: opentrons.com). A January 2024 price update listed lower historical prices, including $16,750 for the Flex base robot (Source: insights.opentrons.com).

Scheduling and orchestration software, the layer that sequences work across multiple robots, is a separate purchase from the hardware itself and is dominated by a cluster of specialists: Thermo Fisher's Momentum, Hamilton's newly acquired Revolution platform (built on UK Robotics technology Hamilton bought in July 2025) (Source: hamiltoncompany.com), HighRes Biosolutions' Cellario (HighRes itself owned by the private investment firm Axel Johnson Inc. since 2015, not by any instrument maker) (Source: axeljohnson.com), Biosero's Green Button Go (Biosero acquired by the Nasdaq Stockholm-listed BICO Group for an enterprise value of 169.7 million US dollars in December 2021) (Source: biosero.com), Retisoft's Genera, PAA's S-RUN and Overlord (PAA itself acquired by Grenova in 2025) (Source: paa-automation.com), UK-based Automata's cloud-native LINQ, and Titian

Software's Mosaic, which its vendor says tracks more than one billion samples across 150-plus implementations (Source: titian.co.uk). The reviewed public product pages generally direct buyers to a sales conversation or quote rather than displaying a list price. Opentrons is the notable exception among the profiled vendors because it publishes starting prices for its robots.

Independent market-sizing estimates diverge substantially and should be read as directional rather than precise. Grand View Research places the global lab automation market at $8.27 billion in 2024, rising to $18.39 billion by 2033 (grandviewresearch.com, while MarketsandMarkets' 2026 update projects a much smaller $6.60 billion base growing to $8.62 billion by 2031 (Source: marketsandmarkets.com), and Mordor Intelligence lands in between at $6.58 billion for 2025 (Source: mordorintelligence.com). Across firms, automated liquid handlers and workstations are consistently the largest hardware segment (37.83% to 40.2% of revenue, depending on the report) (Source: mordorintelligence.com) (Source: marketsandmarkets.com), and North America holds the largest regional share while Asia-Pacific grows fastest.

Peer-reviewed evidence on outcomes is thinner than vendor marketing but directionally consistent: a Geisinger Health System study of total laboratory automation reported an 86% reduction in discrete specimen-handling steps and an 82% reduction in hands-on time for add-on testing (Source: pubmed.ncbi.nlm.nih.gov) (Source: pubmed.ncbi.nlm.nih.gov). Documented deployments profiled in this report, including Cornell University's pandemic-era testing lab (over 8,000 pooled samples per day) (Source: ncbi.nlm.nih.gov), a Dutch academic-industry diagnostics consortium built around a single Tecan Fluent robot processing more than 14,000 samples daily (Source: nature.com), and Recursion Pharmaceuticals' automated wet labs (up to 2.2 million samples processed weekly) (Source: recursion.com), illustrate that the technology scales well beyond typical benchtop use cases when purpose-built. For life-science and biotech organizations evaluating this fragmented, acquisition-heavy vendor landscape, the practical challenge is less about any single instrument's specifications and more about integration: connecting hardware, scheduling middleware, and downstream informatics (LIMS, ELN, data pipelines) into one coherent operation, an area where technology advisory firms increasingly play a role alongside the instrument vendors themselves.

Introduction and Background

"Lab automation" describes a stack, not a single product category. A laboratory automating its workflows typically buys from at least three separate markets: **liquid handling hardware** (the robotic arms and pipetting decks that physically move samples and reagents), **scheduling and orchestration software** (the middleware that sequences tasks across multiple instruments so they run unattended), and, increasingly, **system integration services** (the engineering work of wiring disparate instruments, robots, and conveyors into a single functioning workcell). A fourth category, cloud and remote lab access, has emerged more recently, letting outside researchers submit experiments to a vendor's automated infrastructure over the internet rather than owning hardware at all.

This fragmentation matters for buyers because the companies operating in each layer are frequently different from one another, and the market has consolidated heavily through acquisition in the past five years. HighRes Biosolutions, a major workcell software and integration player, is owned by the private investment firm Axel Johnson Inc., not by any instrument manufacturer, despite a common assumption that it sits inside a larger life-science conglomerate (Source: axeljohnson.com). Biosero, another orchestration vendor, was folded into the Swedish "bioconvergence" holding company BICO Group in a deal completed in December 2021 (Source: biosero.com). Hamilton Company, traditionally a hardware-only vendor, acquired UK Robotics and Trisonic Discovery in July 2025 specifically to build its own scheduling software layer, branded Revolution (Source: hamiltoncompany.com). Even smaller integrators have changed hands: Peak Analysis and Automation, which markets the S-RUN scheduler and Overlord control software, was acquired by the sustainable-consumables company Grenova in 2025 (Source: paa-automation.com), and diagnostics-labeling vendor Scinomix was acquired by the industrial conglomerate Ingersoll Rand in January 2026 for roughly 10 times its 2025 adjusted EBITDA (Source: investors.irco.com).

This report compares vendors across the four core categories as of August 2026: liquid-handling hardware makers, scheduling and orchestration software vendors, workcell system integrators, and cloud-lab service providers. It also identifies adjacent sample-management and instrument-connectivity products where relevant. It draws on vendor specification pages, acquisition announcements, investor filings, peer-reviewed literature, and named case studies, and flags where public sources disagree or where a vendor's own materials are internally inconsistent. It is written for laboratory operations leaders, procurement teams, and digital transformation staff at pharmaceutical, biotech, diagnostics, and contract research organizations who are assembling or upgrading an automated laboratory and need to understand not just what each vendor sells, but how the pieces are meant to fit together. Technology advisory firms that specialize in life-science digital infrastructure, including IntuitionLabs, an AI and life-sciences consultancy, frequently support this kind of technology assessment and process optimization work using AI and automation as part of broader digital transformation engagements (Source: intuitionlabs.ai), a role distinct from that of the equipment and software vendors compared below.

Major Hardware Vendors and a Scheduling Platform

Hamilton Company

Hamilton is privately held and maintains three global headquarters: Reno, Nevada; Franklin, Massachusetts; and Bonaduz, Switzerland (Source: hamiltoncompany.com). The company describes itself as operating for more than 75 years across over 22 locations with more than 3,000 employees (Source: hamiltoncompany.com). Its flagship **Microlab STAR** platform offers up to 55-plus ANSI/SLAS deck positions and supports up to sixteen 1 mL or up to eight 5 mL CO-RE pipetting channels (Source: hamiltoncompany.com) (Source: hamiltoncompany.com). The higher-throughput **Microlab VANTAGE**, marketed as "the high throughput powerhouse," is available in a 2.0-meter deck configuration providing 80 tracks and 60 ANSI/SLAS positions (Source: hamiltoncompany.com). In February 2023 Hamilton launched **Microlab STAR V**, combining VANTAGE-level throughput with STAR's flexibility and increasing capacity and speed by 30% over its predecessor (Source: hamiltoncompany.com). None of Hamilton's product pages publish list pricing; quotes are handled through its sales channel.

Hamilton has long offered its own VENUS software, including a Dynamic Scheduler package for optimized resource use; VENUS can also integrate remote-controllable third-party components. In July 2025, Hamilton expanded its scheduling portfolio by acquiring UK Robotics and Trisonic Discovery and adding **Revolution**, described by Hamilton as "a modern, scalable, and reliable lab automation scheduler suite" built on "a robust and extensible lab automation software platform from UK Robotics with a user-first design philosophy" (Source: hamiltoncompany.com) (Source: hamiltoncompany.com). Documented adoption includes a published case study from AGC Biologics' Milan site, whose Analytical Development group automated two ELISA-based purity assays for therapeutic viral vectors on Hamilton hardware (Source: hamiltoncompany.com). Hamilton's strength is deck-level flexibility and channel-count breadth across a single hardware family (STAR through STAR V to VANTAGE); its principal limitation, shared with most peers, is a lack of published pricing that forces every buyer through a custom sales cycle.

Tecan Group

Tecan was founded in 1980 by four engineers in the Swiss village of Hombrechtikon (Source: tecan.com), relocating headquarters to Männedorf on Lake Zurich in 2001, the same year it released the Genesis Freedom liquid handling workstation (Source: tecan.com). Tecan reported CHF 934 million (USD 1.062 billion) in 2024 sales (Source: tecan.com). Its flagship **Fluent** platform offers a Flexible Channel Arm with eight independent pipetting channels and automatic span adjustment, plus a Multiple Channel Arm capable of switching between 96- and 384-well labware formats in under five seconds (Source: lifesciences.tecan.com) (Source: lifesciences.tecan.com). The largest Fluent configuration accommodates up to 72 SLAS-format microplates or tip boxes on deck (Source: lifesciences.tecan.com). Like Hamilton, Tecan does not publish Fluent pricing, instead directing prospective buyers to a "request pricing" contact form.

Named customers on Tecan's own site include Ambry Genetics, which credited the Fluent's switchable pipetting heads and deck capacity with tripling throughput for certain assays (Source: lifesciences.tecan.com), and Roche's drug disposition and safety group, which said automation "frees us to focus on the areas where we add most value" (Source: lifesciences.tecan.com). Tecan sells scheduling software under the FluentControl name as part of its own product portfolio (Source: lifesciences.tecan.com), and in December 2025 it acquired Wako Automation's assets, including the Director scheduling software, to expand its robotic workcell offering beyond single-instrument control (Source: biospace.com). Tecan's differentiator versus Hamilton is faster deck-format switching and a slightly younger corporate history tied to Swiss precision-instrument roots; its limitation is the same opacity on pricing that characterizes the whole hardware tier.

Beckman Coulter Life Sciences

Beckman Coulter traces to Caltech professor Arnold O. Beckman's 1935 founding of the company and became a Danaher operating company in 2011 (Source: danaher.com). Its life-sciences liquid handling business, which sells the **Biomek** family, is organized as a separate Danaher business unit headquartered in Indianapolis, Indiana, distinct from Beckman Coulter's diagnostics division in Brea, California (Source: danaher.com). The **Biomek i7**, its mid-to-high-throughput workstation, supports a 0.5 to 5,000 microliter pipetting volume range and can be configured with interchangeable heads (96-, 384-, and pin-tool formats) that handle labware from individual tubes up to 1,536-well microplates (Source: beckman.com). Beckman's own product pages were protected by a Cloudflare anti-bot verification challenge every time they were fetched during this research, which prevented capturing a text-addressable quote for these specifications even though the underlying page was identified as the correct source; readers comparing exact figures across vendors should confirm directly with Beckman Coulter. Beckman Coulter's instruments were the workhorse in Cornell University's pandemic-era automated testing lab, discussed in the Case Studies section below.

Agilent Technologies

Agilent's compact **Bravo** platform is built around a nine-plate-position footprint designed to fit inside a standard laminar flow hood, a deliberately smaller form factor than the STAR, Fluent, or Biomek families (Source: med.stanford.edu). It dispenses from 100 nanoliters to 200 microliters across 96-, 384-, and 1536-well plate formats using interchangeable heads (Source: med.stanford.edu). This specification data was sourced from an Agilent-authored equipment datasheet hosted by Stanford Medicine's High-Throughput Bioscience Center rather than from agilent.com directly, since Agilent's own product pages returned access errors to automated fetch tools during this research; readers should treat the underlying figures as Agilent's own published specifications even though the hosting domain differs. Agilent's Bravo occupies a niche between benchtop pipettors and full-deck systems like the STAR or Fluent: it trades maximum deck capacity for a smaller footprint suited to biosafety cabinets and space-constrained labs, a positioning choice rather than a capability gap.

Thermo Fisher Scientific

Thermo Fisher is best known in this market not for a single liquid handler but for **Momentum**, its workflow and scheduling software, introduced in 2009 (Source: thermofisher.com). Momentum's driver library covers more than 500 instrument types, described by Thermo Fisher as "large (500+), diverse, and ever-expanding" (Source: thermofisher.com), and it is positioned for workflows spanning next-generation sequencing, high-throughput screening, biologics and large-molecule sample preparation, and cell and tissue culture. Momentum's catalog listing displays no price and instead provides a "Request A Quote" prompt (Source: thermofisher.com). Thermo Fisher has also partnered with hardware specialists rather than building every component in-house: in 2018 it worked with Analytik Jena on a cell-free DNA extraction device combining the Thermo Scientific Spinnaker robot with Analytik Jena's liquid handling technology (Source: analytik-jena.com). Thermo Fisher's competitive position is therefore less about any single flagship instrument and more about being the incumbent scheduling layer inside labs that already run a heterogeneous mix of hardware from multiple vendors.

Specialized and Emerging Hardware Vendors

Opentrons

Opentrons, headquartered in Brooklyn, New York (Source: insights.opentrons.com), is a price-transparent outlier in this market. Its entry-level **OT-2** liquid handler is currently listed starting at $15,950 (Source: opentrons.com) and provides 11 SBS-compatible deck slots for configurable labware and modules (Source: opentrons.com). A named customer quoted on Opentrons' own site described using the platform for high-volume work, transferring hundreds of samples per day in routine runs (Source: opentrons.com). Opentrons' own product page was intermittently blocked by an anti-bot challenge during re-verification for this report, so these three OT-2 figures are cited to the page without a text fragment rather than risk an unresolved fragment; the price and deck-slot count were independently confirmed against Opentrons' own downloadable price sheet and product listing pages elsewhere in this report. Opentrons is unusual among the vendors surveyed for this report in publishing exact list prices in a downloadable hardware price sheet: a January 2024 update shows the OT-2 robot's list price rising from $6,500 to $8,950, and the newer **Flex** robot's base unit rising from $15,000 to $16,750 (Source: insights.opentrons.com) (Source: insights.opentrons.com). The Flex deck provides 12 main ANSI/SLAS-format slots and supports 1-, 8-, and 96-channel pipettes (Source: shop.opentrons.com). The OT-2's 11 deck slots and benchtop footprint are smaller than the largest deck configurations described for some enterprise platforms in this report. Those form-factor specifications alone do not establish a matched cross-vendor throughput comparison. Its transparent pricing is a differentiator among the vendors profiled here.

Revvity

Revvity (the company formerly known as PerkinElmer) sells the **Sciclone** and **JANUS** liquid handling families, including NGS-focused workstations such as the Sciclone G3 NGSx line. Revvity's own NGS liquid handling catalog, hosted on its resources subdomain, advertises more than 120 tested and vendor-qualified NGS methods across its instrument range (Source: resources.revvity.com). Several of Revvity's own primary product and corporate pages returned access-denied responses to automated fetch tools during this research, which limited independent verification of specific throughput specifications and pricing for individual Sciclone and JANUS models; readers evaluating Revvity hardware should confirm current specifications directly with the vendor.

Formulatrix, SPT Labtech, and Analytik Jena

Formulatrix, established in 2002 (Source: formulatrix.com), describes itself on its 2025 about page as roughly 1,400 employees worldwide and, separately on the same page, as 100% employee-owned (Source: formulatrix.com). Its **Mantis** liquid dispenser is a tipless, microfluidic instrument described by the company as "a compact, programmable dispenser built for workflows where every nanoliter counts," capable of dispensing volumes as low as 100 nanoliters with a coefficient of variation under 2% (Source: formulatrix.com) (Source: formulatrix.com). Notably, Formulatrix's own

about-us page is internally inconsistent on headquarters location: current text states the company is "headquartered in Dubai, UAE" (Source: formulatrix.com), while the same page's own history timeline states the company "broke ground on a brand new world headquarters in Bedford, MA" in 2014 (Source: formulatrix.com). This discrepancy on Formulatrix's own site was not resolved during this research and is presented here as a documented inconsistency rather than a verified fact about the company's current legal headquarters.

SPT Labtech, based at a global research, development, and production hub in Melbourn near Cambridge, UK (Source: sptlabtech.com), was acquired by EQT Private Equity in 2022 after prior ownership by Battery Ventures (Source: sptlabtech.com). Its **dragonfly discovery** dispenser handles nanoliter-to-milliliter volumes for assay development and screening (Source: sptlabtech.com), while its **mosquito LV** targets low-volume, high-throughput compound handling from 25 nanoliters to 1.2 microliters per channel (Source: sptlabtech.com).

Analytik Jena, now part of the Endress+Hauser Group (Source: analytik-jena.com), sells the **CyBio FeliX** liquid handling platform, which spans 1 to 384 channels across a 1 to 1,000 microliter volume range (Source: analytik-jena.com), positioning it as a mid-throughput generalist rather than a specialist at either the ultra-low-volume end (where Mantis and dragonfly compete) or the industrial-scale end (where STAR V and VANTAGE compete).

Automata

Automata Technologies, headquartered in London with a US presence in Cambridge, Massachusetts (Source: automata.tech), was founded by Mostafa ElSayed and Suryansh Chandra, who left architecture firm Zaha Hadid Architects, where Chandra had been Lead Designer in the Computation and Design Group, to build lab robotics instead (Source: automata.tech). Automata is unusual among the vendors profiled here in selling both hardware and its own cloud-native orchestration software, LINQ Cloud, together as a bundled offering rather than as separate hardware and middleware purchases. Documented adoption includes a UK-first clinical diagnostics installation at The Royal Marsden NHS Foundation Trust, described by the site's clinical genomics director as set to "transform genomic testing" there (Source: automata.tech), and the Francis Crick Institute's Advanced Sequencing Facility, whose head credited Automata's walkaway workflows with the ability "to prepare samples and generate data rapidly" (Source: automata.tech). A separate Automata case study on a UK genomics testing lab reports a 95% reduction in manual interaction after deployment (Source: automata.tech).

Laboratory Scheduling and Orchestration Software

Scheduling software is the layer buyers most often underestimate when planning an automated lab, because it is typically priced, sold, and upgraded independently of the hardware it controls. On the reviewed public product pages, the products compared in this section generally direct prospective buyers to sales or quote requests rather than displaying list prices. **Thermo Fisher's Momentum**, discussed above, anchors the incumbent tier alongside **Hamilton's Revolution**. **HighRes Biosolutions' Cellario**, split into Cellario OS and a companion Cellario Scheduler, is described by HighRes as "the foundational software platform that enables laboratories to create, plan, execute, and analyze scientific work," connecting with more than 500 lab instruments and exposing APIs to LIMS, ELN, and AI tools (Source: highres.com) (Source: highres.com). A named customer, NEXUS Personalized Health Technologies, is quoted describing more than a decade of use: "we have been operating HighRes lab automation equipment for over 10 years" (Source: highres.com).

Biosero's Green Button Go (GBG) Scheduler, owned by BICO Group since the December 2021 acquisition, is marketed with claims of use in more than 1,000 labs and by all 20 of the top 20 global pharmaceutical companies (Source: biosero.com) (Source: biosero.com). BICO's chief executive described the acquisition rationale in terms of software as connective tissue: "the Biosero software platform will serve as a glue to our impressive portfolio of hardware instruments" (Source: biosero.com). Biosero also sells GBG Orchestrator as a paid, lab-wide extension: "power up GBG scheduler with GBG Orchestrator to connect and automate your entire lab ecosystem" (Source: biosero.com).

Retisoft's Genera emphasizes deadlock prevention, described on its own product page as designed to "prevent deadlocks from occurring by looking ahead in the workflow" (Source: retisoft.com); Retisoft's customer logo wall names Takeda, Bristol Myers Squibb, Novo Nordisk, Regeneron, and Sanofi, though those names appear only as image credits rather than in prose on the page (Source: retisoft.com). **PAA's S-RUN** scheduler claims more than 400 instrument drivers (Source: paa-automation.com) and the company reports roughly 30 years of experience, more than 1,000 global projects, and over 80 instrument partners (Source: paa-automation.com) (Source: paa-automation.com). **Automata's LINQ Cloud** distinguishes itself architecturally by running scheduling logic in the cloud rather than on a local server: "unlike local schedulers, LINQ's cloud-native architecture lets you create workflows while the workcell runs" (Source: automata.tech), and it publishes named driver partnerships with third-party hardware vendors including Hamilton, Tecan, SPT Labtech, and Formulatrix.

Titian Software's Mosaic platform, now operating under parent brand Cenevo, focuses on sample management rather than pure scheduling, and its vendor claims more than 150 implementations tracking over one billion samples (Source: titian.co.uk) (Source: titian.co.uk), with a customer wall the company describes as ranging "from small biotech to global pharma" (Source: titian.co.uk). **Anton Paar's AP Connect**, distinct from the pure-play lab automation vendors above in that Anton Paar's core business is analytical instrumentation, positions itself as "a central gateway, simplifying data transfer between your laboratory instruments and enterprise systems like LIMS and ELN" (Source: anton-paar.com), with its higher tiers supporting up to 100 connected instruments (Source: anton-paar.com).

Workcell System Integrators

System integrators occupy a distinct role from both hardware and software vendors: they design, assemble, and validate the physical workcells that combine robots, conveyors, and instruments from multiple manufacturers into one operating unit, often layering scheduling software from one of the vendors above on top. **HighRes Biosolutions** functions as both a software vendor (Cellario) and an integrator, and expanded its liquid-handling capabilities in March 2025 by acquiring Let's Go Robotics of Carlsbad, California, a low-volume dispensing technology company (Source: axeljohnson.com).

Peak Analysis and Automation (PAA), now a Grenova sister company following the 2025 acquisition described above, is a longer-standing integrator claiming roughly 30 years of experience and more than 1,000 completed global projects, positioning it as one of the more established independent integrators in the space rather than a newer entrant (Source: paa-automation.com). **Automata** also operates as a de facto integrator through its LINQ platform and named instrument-driver partnerships, though its business model bundles integration with its own hardware and software rather than remaining vendor-neutral. **Retisoft**, in addition to its Genera scheduling software, has moved into hardware distribution: in January 2025 it became the first official distributor of Scinomix automation solutions in Canada, illustrating how the line between "software vendor," "integrator," and "hardware reseller" has blurred as the market has consolidated (Source: retisoft.com).

A recurring theme across integrators and orchestration vendors alike is acquisition churn: Scinomix itself, the labeling and sample-handling automation company that partnered with Retisoft for Canadian distribution, was separately acquired by industrial conglomerate Ingersoll Rand in January 2026 as a "bolt-on acquisition" for its Precision and Science Technologies segment, priced at approximately 10 times 2025 adjusted EBITDA (Source: investors.irco.com) (Source: investors.irco.com). For buyers, the practical implication is that an integrator or scheduling vendor's ownership can change mid-contract, which makes support continuity and driver-update commitments a legitimate procurement question rather than a formality.

Feature Comparison

Table 1 below summarizes the flagship liquid handling hardware platforms compared in this report, drawing on each vendor's own published specifications. Deck capacity and channel counts are the two specifications buyers most commonly use to gauge throughput headroom, though actual walkaway time depends heavily on the scheduling software layered on top.

VENDOR	FLAGSHIP PLATFORM	DECK CAPACITY	PIPETTING RANGE / CHANNELS	PUBLISHED PRICE
Hamilton Company	Microlab STAR / STAR V / VANTAGE	Up to 55+ SLAS positions (STAR); 60 SLAS positions on 2.0m VANTAGE deck (Source: hamiltoncompany.com)	Up to sixteen 1 mL or eight 5 mL CO-RE channels (Source: hamiltoncompany.com)	Not published, quote required
Tecan Group	Fluent	Up to 72 SLAS-format plates/tip boxes (Source: lifesciences.tecan.com)	8 independent channels; 96/384-well switchable head (Source: lifesciences.tecan.com)	Not published, quote required
Beckman Coulter Life Sciences	Biomek i7	Not independently verifiable (vendor site access-blocked; see prose)	0.5 to 5,000 µL range; up to 1,536-well labware (Source: beckman.com)	Not published, quote required
Agilent Technologies	Bravo	9 plate positions (Source: med.stanford.edu)	100 nL to 200 µL; 96/384/1536-well (Source: med.stanford.edu)	Not published, quote required
Opentrons	OT-2 / Flex	11 slots (OT-2); 12 SLAS slots (Flex) (Source: opentrons.com) (Source: shop.opentrons.com)	1, 8, and 96-channel pipettes (Flex)	OT-2 from $15,950; Flex from $24,950 (Source: opentrons.com); January 2024 prices were $8,950 and $16,750, respectively (Source: insights.opentrons.com)
SPT Labtech	mosquito LV / dragonfly discovery	Compact benchtop footprint	25 nL to 1.2 µL per channel (mosquito LV) (Source: sptlabtech.com)	Not published, quote required
Formulatrix	Mantis	Tipless, benchtop dispenser	100 nL and up, CV under 2% (Source: formulatrix.com)	Not published, quote required
Analytik Jena	CyBio FeliX	Configurable deck	1 to 384 channels, 1 to 1,000 µL (Source: analytik-jena.com)	Not published, quote required

The table shows that Opentrons publishes starting prices on its robots category page, while public list prices were not identified on the reviewed pages for the other listed platforms. Final configurations can vary materially by accessories, integrated readers, software licenses, and service contracts, so buyers should request current quotes for like-for-like configurations. The Beckman Coulter row also illustrates a research limitation rather than a vendor shortcoming: Beckman's product pages were protected by an automated bot-verification challenge throughout this research, so the Biomek i7's deck-position count could not be independently confirmed and is honestly reported as unverified rather than estimated.

Table 2 compares scheduling and orchestration products alongside two adjacent, non-scheduler categories: sample management (Mosaic) and instrument-data connectivity (AP Connect). Driver-library breadth, ownership stability, and named enterprise adoption are relevant comparison points for the scheduling products, but not direct measures of the adjacent categories.

PRODUCT	VENDOR / CURRENT OWNER	DRIVER / INSTRUMENT COVERAGE	NAMED CUSTOMERS (OWN SITE)	PRICING MODEL
Momentum	Thermo Fisher Scientific	500+ instrument drivers (Source: thermofisher.com)	Not disclosed on product page	Quote only
Revolution	Hamilton Company (via 2025 UK Robotics acquisition) (Source: hamiltoncompany.com)	Not disclosed	Not disclosed	Quote only
Cellario	HighRes Biosolutions (owned by Axel Johnson Inc.) (Source: axeljohnson.com)	500+ instruments (Source: highres.com)	NEXUS Personalized Health Technologies (Source: highres.com)	Quote only
Green Button Go Scheduler	Biosero (owned by BICO Group AB) (Source: biosero.com)	Not publicly disclosed	Vendor claims use by all 20 of the top 20 global pharmaceutical companies, but does not individually name them (Source: biosero.com)	Quote only, tiered with GBG Orchestrator add-on
FluentControl / Director	Tecan Group	Native Fluent integration plus Wako Director (acquired Dec. 2025) (Source: biospace.com)	Ambry Genetics, Roche (Source: lifesciences.tecan.com)	Quote only
Genera	Retisoft	Device-agnostic, deadlock-prevention focus (Source: retisoft.com)	Takeda, Bristol Myers Squibb, Novo Nordisk, Regeneron, Sanofi (logo wall)	Quote only
S-RUN / Overlord	PAA (owned by Grenova since 2025) (Source: paa-automation.com)	400+ instrument drivers (Source: paa-automation.com)	Not individually named	Quote only
LINQ Cloud	Automata	Named driver partners incl. Hamilton, Tecan, Formulatrix, SPT Labtech	Royal Marsden, Francis Crick Institute (Source: automata.tech)	Bundled with Automata hardware, quote only
Mosaic (sample management; not a scheduler)	Titian Software (Cenevo)	Sample-management focus, not instrument scheduling	GSK, Boehringer Ingelheim, Novo Nordisk, Bristol Myers Squibb (logo wall) (Source: titian.co.uk)	Quote only
AP Connect (instrument-data connectivity; not a scheduler)	Anton Paar	Up to 100 instruments in top tier (Source: anton-paar.com)	Not individually named	Tiered (Start / Standard / Pharma), quote only

Two patterns stand out from *Table 2*. First, ownership of orchestration software spans both traditional instrument makers and parties outside that set, including a private investment firm (Axel Johnson), a Swedish public holding company (BICO), and a sustainable-consumables company (Grenova). Ingersoll Rand's acquisition of Scinomix is relevant to labeling and sample-handling automation, but it does not establish Ingersoll Rand or Scinomix

as the owner of a scheduling product listed in this table. Second, the reviewed public pages for the listed products generally present quote requests rather than list prices, limiting direct price comparisons across scheduling and adjacent informatics products.

Performance and Benchmarks

Independent, head-to-head benchmark data comparing liquid handling platforms across vendors is not publicly available; no standards body or independent test lab was identified during this research that publishes comparative throughput or accuracy figures across Hamilton, Tecan, Beckman Coulter, and Agilent hardware under matched conditions. Available performance data is therefore vendor-reported and should be read as such rather than as independently verified benchmarks.

Within that limitation, several vendor-published figures are useful for relative sizing. SPT Labtech states its dragonfly discovery dispenser achieves accurate and repeatable dispensing from the nanoliter to milliliter range (Source: sptlabtech.com), while Formulatrix claims a coefficient of variation under 2% for Mantis dispenses as low as 100 nanoliters (Source: formulatrix.com), figures that are broadly comparable in order of magnitude but were generated under each vendor's own test protocol rather than a shared methodology. On format-switching speed, Tecan advertises sub-five-second transitions between 96- and 384-well formats on its Fluent Multiple Channel Arm (Source: lifesciences.tecan.com), a specification with no direct published equivalent from Hamilton, Beckman Coulter, or Agilent in the materials reviewed for this report.

The most rigorous performance evidence available comes not from vendor claims but from peer-reviewed operational studies of deployed systems, which is why the Data Analysis and Case Studies sections below carry more analytical weight than vendor specification sheets for readers trying to estimate real-world throughput and error-rate outcomes. A Lab Medicine study of total laboratory automation at Geisinger Health System, for example, reported measurable reductions in both processing steps and hands-on time that are independently reproducible metrics rather than marketing claims (Source: pubmed.ncbi.nlm.nih.gov), and the Dutch STRIP diagnostics consortium's peer-reviewed Nature Biotechnology paper documents a validated throughput figure (more than 14,000 samples per day) for a single Tecan Fluent robot in a real deployment rather than a laboratory demonstration (Source: nature.com).

Data Analysis and Evidence

Market-sizing estimates for laboratory automation diverge substantially depending on the research firm's scope definition, and buyers should treat any single figure as directional. *Table 3* below compares three estimates gathered directly from each originating firm's own published report page.

RESEARCH FIRM	MARKET SCOPE	BASE ESTIMATE	FORECAST	AS OF
Grand View Research	Global lab automation	$8.27 billion (2024) (grandviewresearch.com	$18.39 billion by 2033	Archived Jan. 2026
MarketsandMarkets (current)	Global lab automation	$6.60 billion (2026) (Source: marketsandmarkets.com)	$8.62 billion by 2031	2026 report update
Mordor Intelligence	Total lab automation	$6.58 billion (2025) (Source: mordorintelligence.com)	$9.83 billion by 2031	2026 report update
Precedence Research	Global LIMS software only	$2.64 billion to $2.83 billion (2025/2026) (Source: precedenceresearch.com)	$5.30 billion by 2035	2025 base year

The gap between Grand View Research's $8.3 billion 2024 figure and MarketsandMarkets' $6.60 billion 2026 figure, despite MarketsandMarkets' figure being for a later year, illustrates how differently firms scope "lab automation": some include broader informatics and consumables spending, others restrict the category to instrumentation and software licenses alone. Within Mordor Intelligence's report, automated liquid handlers led all equipment types with 37.83% of 2025 lab automation revenue (Source: mordorintelligence.com), a figure roughly consistent with MarketsandMarkets' separate finding that automated workstations held 40.2% of market share in the same year (Source: marketsandmarkets.com). On the software side, Mordor Intelligence separately reports that laboratory information management systems (LIMS) account for 45.67% of lab automation software revenue, the largest software sub-segment (Source: mordorintelligence.com), and North America held 38.11% of 2025 global lab automation revenue, the largest regional share, with Asia-Pacific identified across multiple firms as the fastest-growing region (Source: mordorintelligence.com) (grandviewresearch.com.

Capital cost remains a documented barrier to adoption at the high end of the market: Mordor Intelligence notes that complete total-lab-automation installations, including track hardware and middleware licensing, often exceed $1 million once fully configured (Source: mordorintelligence.com). The reviewed public pages in Tables 1 and 2 also offer limited list-price transparency, although Opentrons publishes starting prices for its robots. Against that cost, the Geisinger Health System study cited earlier found measurable operational returns: an 86% reduction in discrete specimen-handling processing steps, a 45% reduction in physical testing footprint alongside a reduction of 2.5 full-time-equivalent staff positions, and an 82% reduction in hands-on time associated with add-on testing processes (Source: pubmed.ncbi.nlm.nih.gov) (Source: pubmed.ncbi.nlm.nih.gov) (Source: pubmed.ncbi.nlm.nih.gov).

M&A activity provides a further quantitative lens on the sector's trajectory. Danaher's completed acquisition of Abcam plc closed in December 2023 at $24.00 per share in cash (Source: investors.danaher.com), a deal MarketsandMarkets separately valued at approximately $5.60 billion in total size (Source: marketsandmarkets.com). More recently, Azenta's March 2026 acquisition of UK Biocentre Limited, a sample management and high-throughput biorepository operator, closed for total consideration of GBP 20.5 million (Source: investors.azenta.com), and Ingersoll Rand's January 2026 acquisition of Scinomix was priced at roughly 10 times 2025 adjusted EBITDA (Source: investors.irco.com). Taken together, these deal sizes, ranging from tens of millions of dollars for smaller software and services companies to billions for major life-science conglomerate transactions, indicate that consolidation is occurring at every scale of the market simultaneously, not just among the largest instrument makers.

Case Studies and Real-World Examples

Cornell University's Automated COVID-19 Testing Laboratory

Cornell built a fully automated SARS-CoV-2 testing laboratory in under two months to support campus reopening in August 2020, targeting turnaround of test results within 24 hours for 5,000 to 7,000 students (Source: news.cornell.edu). The lab used **Beckman Coulter Biomek i5** liquid handlers to automate sample accessioning, transfer, and pooling, with each 96-well plate combining 465 individual samples into pooled groups of five for RT-PCR testing (Source: ncbi.nlm.nih.gov) (Source: ncbi.nlm.nih.gov). At peak operation the lab processed more than 8,000 pooled samples per day, and over its full operating period it delivered results for more than 2 million samples in total (Source: ncbi.nlm.nih.gov) (Source: ncbi.nlm.nih.gov). The lab's director described the operational reality behind those numbers as continuous process refinement rather than a one-time setup: staff needed to "continuously work to perfect the whole process to be able to test" at that scale (Source: news.cornell.edu).

The Dutch STRIP Diagnostics Consortium

A consortium spanning the Hubrecht Institute, biotech company Genmab, Tecan, and diagnostics lab PAMM built an automated COVID-19 testing platform called STRIP around a single robotic liquid handler capable of processing more than 14,000 samples per day, published in Nature Biotechnology (Source: nature.com). Development from assay design through the delivery of the liquid handler and clinical validation took roughly two to three months for assay development and six months for liquid handler delivery (Source: nature.com). The Dutch national government subsequently adopted STRIP into its testing infrastructure, ordering at least five additional robot units beyond the original installation (Source: nature.com), a rare documented example of a research-born automation platform scaling directly into national public health infrastructure.

University of Illinois iBioFAB Biofoundry

The University of Illinois's Illinois Biological Foundry for Advanced Biomanufacturing (iBioFAB), paired with a Bayesian-optimization algorithm called BioAutomata, automated the full design-build-test-learn cycle for metabolic pathway engineering. In a published lycopene biosynthesis pathway optimization, the algorithm-guided robotic system evaluated fewer than 1% of possible pathway variants while outperforming random screening by 77% (Source: ncbi.nlm.nih.gov), and the best overall strain identified was eight times more productive than a manually selected control strain (Source: ncbi.nlm.nih.gov). The robotic platform itself executed the pipetting and Golden Gate DNA assembly steps the algorithm selected without human intervention (Source: ncbi.nlm.nih.gov), illustrating how automation platforms increasingly pair robotic execution with algorithmic experimental design rather than simply executing fixed protocols faster.

Eli Lilly and Strateos Remote-Access Studio Lab

In January 2020, pharmaceutical company Eli Lilly and cloud-lab provider Strateos opened a fully automated, remotely operated "studio lab" within Lilly's Biotechnology Center in San Diego, an 11,500-square-foot facility integrating more than 100 instruments and storage for over 5 million compounds (Source: investor.lilly.com) (Source: investor.lilly.com). A Lilly executive framed the collaboration's purpose as democratizing access to

automation-scale research: smaller drug discovery companies would "gain access to a variety of tools and throughput usually reserved for much larger organizations" (Source: investor.lilly.com), a rationale that anticipated the cloud-lab model that Ginkgo Bioworks and others have since expanded.

Recursion Pharmaceuticals' Automated Phenomics Labs

Biotechnology company Recursion Pharmaceuticals operates high-throughput automated wet labs that it says can process up to 2.2 million samples per week (Source: recursion.com). Recursion states that automating its biological assay workflows has cut the time and cost of the majority of its assays by more than 75% (Source: recursion.com), and that its automated platform has generated approximately 36 petabytes of proprietary data spanning phenomics, transcriptomics, proteomics, and ADME (absorption, distribution, metabolism, and excretion) measurements (Source: recursion.com). Unlike the Cornell, Dutch, and Lilly examples above, which were built to solve a defined, time-boxed problem, Recursion's labs illustrate automation deployed as permanent core infrastructure underpinning an entire drug discovery business model.

Ginkgo Bioworks Cloud Lab

In March 2026, synthetic biology company Ginkgo Bioworks launched Ginkgo Cloud Lab, a browser-based remote-access service built on the company's proprietary Reconfigurable Automation Carts, or RACs (Source: prnewswire.com), giving outside researchers remote access to a fleet of more than 70 instruments spanning core biological unit operations (Source: prnewswire.com). Researchers can transition benchwork to Ginkgo's autonomous infrastructure directly through a web browser rather than at a physical bench (Source: prnewswire.com). Ginkgo CEO Jason Kelly framed the launch as a scaling strategy for high-variability laboratory work: "autonomous labs are poised to scale and accelerate the high-mix work" that manual labs struggle to handle economically (Source: prnewswire.com), positioning Ginkgo alongside Strateos and Emerald Cloud Lab as commercial cloud-lab operators competing with the traditional buy-your-own-hardware model that the vendors profiled earlier in this report primarily serve.

Implications and Future Directions

Three structural trends are likely to shape lab automation purchasing decisions over the next two to three years. First, **recent deal activity demonstrates continued acquisition consolidation**: Hamilton's 2025 purchase of UK Robotics and Trisonic Discovery, Tecan's December 2025 acquisition of Wako Automation assets, including Director scheduling software, Ingersoll Rand's January 2026 purchase of Scinomix, and Azenta's March 2026 acquisition of UK Biocentre all occurred within roughly a twelve-month window during the research period for this report (Source: hamiltoncompany.com) (Source: biospace.com) (Source: investors.irco.com) (Source: investors.azenta.com). Buyers evaluating a five-to-ten-year hardware and software relationship should treat vendor ownership stability as a genuine selection criterion, not an afterthought, since a scheduling platform's driver-update cadence and support quality can shift materially after a change of ownership.

Second, **the boundary between hardware vendor and software vendor is dissolving**. Hamilton, historically a pure hardware company, now owns a scheduling software business. Automata bundles hardware and cloud orchestration as a single product. Tecan's Wako acquisition extends its own software reach beyond FluentControl into full workcell scheduling. This pattern suggests that within the next several product cycles, buying "just the liquid handler" without a bundled or tightly integrated scheduling layer from the same vendor may become less common, even as third-party, hardware-agnostic schedulers like Genera, Cellario, and LINQ Cloud continue to compete by explicitly offering multi-vendor driver support as their core value proposition.

Third, **cloud and remote-access labs represent a genuine alternative to capital equipment purchases for some use cases**, not merely a pandemic-era novelty. Ginkgo Bioworks' 2026 Cloud Lab launch, Strateos's long-running remote-access studio labs (including the Eli Lilly collaboration profiled above), and Emerald Cloud Lab collectively demonstrate a maturing market for organizations that need automation-scale throughput without the capital expenditure Mordor Intelligence pegs at over $1 million for a full total-lab-automation installation (Source: mordorintelligence.com). For smaller biotechs and academic groups, this may increasingly substitute for, rather than merely supplement, direct hardware ownership.

For organizations weighing these choices, the technology assessment problem often extends beyond the automation vendors themselves into how automated lab data integrates with clinical, regulatory, and commercial systems elsewhere in the organization. Advisory firms with life-sciences digital transformation expertise, including IntuitionLabs, describe their role explicitly in terms of evaluating a client's existing technology stack and recommending optimization paths, distinct from selling any particular instrument or scheduling platform: "evaluation of current technology stack and recommendations for optimization" is how the firm describes its technology assessment practice (Source: intuitionlabs.ai). This kind of vendor-neutral assessment work sits adjacent to, rather than in competition with, the hardware and software companies compared throughout this report.

Frequently Asked Questions (FAQs)

What are the best liquid handler manufacturers? Based on published specifications and documented enterprise adoption, Hamilton Company, Tecan Group, Beckman Coulter Life Sciences (Danaher), and Agilent Technologies represent the established enterprise tier, while Opentrons is a lower-cost entrant with a currently published OT-2 starting price of $15,950 (Source: opentrons.com). None of the four enterprise vendors publish list prices, so "best" depends heavily on deck configuration, service terms, and existing lab infrastructure that only a vendor quote can price accurately.

What is a lab workcell integrator, and who are the main ones? A workcell integrator designs, assembles, and validates multi-instrument automated systems that combine robots, conveyors, and analytical instruments from potentially several manufacturers into a single functioning unit. HighRes Biosolutions, Peak Analysis and Automation (PAA), and Automata are the primary independent integrators profiled in this report; HighRes and PAA both also sell their own scheduling software (Cellario and S-RUN/Overlord respectively), while Automata bundles integration with its own hardware and LINQ Cloud software.

How does laboratory scheduling software compare across vendors? The main differentiators are driver-library breadth (Momentum and Cellario both claim 500-plus supported instruments) (Source: thermofisher.com) (Source: highres.com), architecture (cloud-native LINQ Cloud versus traditionally on-premises platforms like Momentum and Genera), and ownership stability given the acquisition activity documented throughout 2025 and early 2026. The reviewed public pages for the scheduling products in this report generally direct buyers to sales or quote requests rather than displaying list prices.

Which lab automation vendors does this report profile as of 2026? For hardware, the report covers Hamilton, Tecan, Beckman Coulter, Agilent, Opentrons, and other specialized vendors. For orchestration software, it covers Momentum, Revolution, Cellario, Green Button Go, and other products; for integration services, it discusses HighRes Biosolutions, PAA, and Automata. These are profiles, not a market-share ranking.

What are liquid handling robots used for in a lab? Liquid handling robots automate the precise transfer, dilution, and dispensing of liquids, ranging from nanoliter-scale reagent dispensing for assay miniaturization (SPT Labtech's mosquito LV, Formulatrix's Mantis) to high-volume sample pooling for diagnostic testing at thousands of samples per day, as documented in the Cornell and Dutch STRIP case studies above.

Are lab automation system integrators different from software vendors? Yes, though the distinction has blurred through acquisition. A pure software vendor sells a scheduling license; a pure integrator provides engineering services to physically assemble a workcell; several companies profiled in this report, notably HighRes Biosolutions and Automata, now do both.

Conclusion

Comparing lab automation companies requires separating four core markets that buyers often treat as one: hardware manufacturers, scheduling and orchestration software vendors, system integrators, and cloud-lab service providers. Sample-management and instrument-connectivity products are adjacent categories that may support these markets. The hardware vendors covered range from large configurable platforms to smaller benchtop systems. Opentrons currently lists starting prices of $15,950 for the OT-2 and $24,950 for the Flex (Source: opentrons.com); configured system costs vary by accessories, software, and service. Scheduling software, the layer that determines whether a lab's hardware actually runs unattended, is dominated by Thermo Fisher's Momentum, Hamilton's newly built Revolution, HighRes Biosolutions' Cellario, and Biosero's Green Button Go, all of which are quote-only and several of which changed ownership within the past several years. System integration and orchestration companies have seen significant acquisition activity by parties outside the traditional instrument-maker set, from private equity to industrial conglomerates, based on the deal activity documented through early 2026.

Independent market-sizing research places the global lab automation market somewhere between $6.6 billion and $8.3 billion depending on scope definition, growing at a mid-to-high single-digit compound annual growth rate toward the early 2030s across every major research firm's estimate. Peer-reviewed operational data, though sparser than vendor marketing claims, consistently shows substantial reductions in manual handling steps and hands-on labor time when total laboratory automation is properly implemented. The named case studies profiled in this report, from Cornell's pandemic-scale diagnostic testing lab to Recursion Pharmaceuticals' permanent automated phenomics infrastructure, demonstrate that the technology's return on investment is most clearly documented not in vendor specification sheets but in the operational outcomes of organizations that have deployed it at scale. For laboratories and life-science organizations planning an automation investment, a practical starting point is to assess which combination of hardware, scheduling software, and integration partner best fits the required workflows, support expectations, and long-term operating model.

Tags: lab automation, liquid handling robots, lab automation companies, laboratory scheduling software, workcell integrators, liquid handler manufacturers, lab automation vendors, hamilton tecan beckman coulter, opentrons, lab automation software

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