

MARKET REPORT



Disposable Tips For Automated Liquid Handlers Trends 2016

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Disposable Tips For Automated Liquid Handlers Trends 2016

HTStec's Disposable Tips For Automated Liquid Handlers Trends 2016 report was published on 23 June 2016. This 51 page market report summarizes the results of HTStec's industry-wide global web-based benchmarking survey on disposable pipette tips for automated liquid handling instrumentation carried out in June 2016. The survey was initiated by HTStec as part of its tracking of emerging life science marketplaces and in response to calls from automated liquid handler vendors to obtain recent market information about automation consumables, particularly disposable tips. The questionnaire was compiled to meet the needs, requirements and interests of the automated liquid handling vendor community. The main objective was to gain a better understanding of the dynamics associated with disposable tip usage, storage, purchase and acquisition. The report is based on 65 responses mainly from University Research, Pharma and Biotech labs globally.

Executive Summary

- This market report summarizes the results of HTStec's industry-wide global web-based benchmarking survey on disposable pipette tips for automated liquid handling instrumentation carried out in June 2016.
- The survey was initiated by HTStec as part of its tracking of emerging life science marketplaces and in response to calls from automated liquid handler vendors to obtain recent market information about automation consumables, particularly disposable tips.
- The questionnaire was compiled to meet the needs, requirements and interests of the automated liquid handling vendor community. The main objective was to gain a better understanding of the dynamics associated with disposable tip usage, storage, purchase and acquisition.
- Equal emphasis was given to soliciting opinion from all areas and organisations where automated liquid handlers utilising disposable pipette tips are used irrespective of application.
- The survey looked at the following aspects of disposable pipette tips for automated liquid handlers as practiced today (2016) and in some cases as predicted/wanted for the future (2018): level of liquid handling expertise; vendors' automated liquid handling systems for which respondents purchase disposable pipette tips; frequency of purchasing automation disposable pipette tips, are tips automatically reordered at fixed intervals, do they take into account the "shelf life" of purchased pipette tip stock; which job roles can reorder existing disposable pipette tips and who has the authority to switch disposable pipette tip supplier; how much pipette tip stock is stored in the lab close to an automated liquid handler; are disposable tip purchases consolidated to bulk buy with others in an organisation; has the lab decided to standardise on a specific vendor's automated liquid handling instruments; approximate annual budget for automated liquid handler disposable tips; % of budget allocated to tips from the liquid handling instrument manufacturer versus tips from 3rd party plastic companies/secondary suppliers; what is driving respondents to find alternative third party "compatible" disposable pipette tips; most purchased from 3rd party plastic companies/secondary suppliers; what influences a decision to purchase specific third party "compatible" disposable pipette tips; notice taken of vendor statements about tips that must be used; whether respondents feel it would compromise the quality of their pipetting by using compatible tips; whether respondents verify the performance of compatible pipette tips before changing suppliers; evaluation process used in verifying the performance of compatible tips; experience of using compatible tips; quality bio-certifications of disposable tips that are an absolute requirement for respondent's work; application areas that require the highest quality/bio-certified tips; number of high quality/bio-certified tips used on a daily basis; whether respondents have investigated disposable tips for extractables (leachables); value placed on 'so-called' low retention tips; use of disposable black conductive pipette tips with liquid level sensing capabilities; use of automated liquid handlers featuring positive displacement pipette tips; importance that pipette tips are guaranteed fully traceable from the mould to the bench; extent to which running costs feature in any future decision to purchase/choose a new automated liquid handler; whether the cost of pipette tips has led respondents to consider an acoustic liquid handler; whether disposable tips are reused; use of tip regeneration methods; and any unmet needs/other issues encountered related to sourcing or using disposable tips.

- The main questionnaire consisted of 30 multi-choice questions and 2 open-ended question. In addition, there were 6 questions related solely to survey demographics.
- The survey collected 65 validated responses, of these 72% provided comprehensive input.
- Survey responses were geographically split: 42% Europe; 42% North America; 13% Asia (excluding Japan & China); and 3% Japan.
- Respondents came from 29 University/Research Institute/Government Labs/Not-for-Profit; 16 Pharmaceutical; 8 Biotech; 4 Diagnostics; 3 Medical School/Hospital/Clinic; 2 Food & Beverage; 1 Agrochemical/Agri-Biotech Company; 1 Animal Health; and 1 Other.
- Most survey respondents had a senior job role or position which was in descending order: 20 research scientists; 14 lab managers; 6 senior scientists/researchers; 5 lab technicians; 4 principal investigators; 3 section/group leaders; 3 professors/assistant professors; 3 directors; 2 graduate/ PhD students; 2 postdocs; 2 department heads; and 1 other.
- Survey results were expressed as an average of all survey respondents. In addition, where appropriate the data was fully reanalyzed after sub-division into the following 5 survey groups: 1) Expert User; 2) Industry; 3) University Research; 4) Europe; and 5) North America.
- The majority of survey respondents were expert users (i.e. very familiar with most aspects of automated liquid handling).
- The vendor's automated liquid handling systems for which respondents most purchase disposable tips came from Beckman Coulter, Thermo Scientific, Eppendorf and Tecan.
- The median frequency of disposable tip ordering/purchase was every 3 months.
- The majority do not automatically reorder disposable tips at fixed intervals.
- The majority do not take into account the 'shelf life' of disposable tips.
- The lab role that most reordered existing disposable tips was the lab scientist/associate.
- The lab role that were most authorised to switch tip supplier was the lab head/manager.
- The median disposable tip stock stored in respondent's lab close to their automated liquid handler was sufficient for 1 month's operation.
- The majority do not consolidate disposable tip purchases to bulk buy with other users.
- The majority have decided not to standardise on a specific vendor's automated liquid handler.
- The median budget allocated in 2016 for automation disposable tips was \$5K-\$10K. The greatest share of this budget was allocated to purchase tips from the liquid handling instrument manufacturer.
- Feedback on what has driven respondents to source automation pipette tips from third party plastic companies/secondary suppliers was documented.
- Instrument vendor tip pricing is too high was ranked the greatest influence in driving respondents to find alternative third party 'compatible' disposable pipette tips.
- Axygen was the 3rd party plastic company from which respondents have most purchased tips.
- Cost was rated the main influence on a decision to purchase a specific 3rd party 'compatible' disposable pipette tips.
- Most respondents reported it makes good sense to take notice of instrument vendor statements on the use of their tips.

- The majority feel that using 3rd party 'compatible' disposable pipette tips would compromise to some extent the quality of their pipetting.
- The majority carry out extensive in house validation of performance before switching tip supplier, and details of the processes used to verify 3rd party 'compatible' were documented.
- Respondents previous experience of 3rd party 'compatible' disposable tips was adequate (i.e. some limitations, but useful for most applications).
- The majority have not used a mobile app to help choose the best 'compatible' disposable pipette tips for their liquid handler.
- The majority picked DNase-free and sterility as the quality bio-certifications or features of disposable tips most needed in their work.
- The application area/process where respondents intend to make most use of high quality/bio-certified disposable tips was PCR/qPCR & NGS assay setup.
- A median of 101-500 high quality/bio-certified tips were used per 8h day today (2016).
- Most have not evaluated or verified the effect of extractables from tips on assay performance.
- Most place moderate value (i.e. sounds useful and worth evaluating) on 'so-called' low retention tips.
- Most do not use disposable black conductive pipette tips with liquid level sensing capabilities.
- The majority do not use automated liquid handlers featuring positive displacement tips.
- Most place no importance on pipette tips being guaranteed fully traceable from mould to the bench.
- The majority place moderate importance on running costs in any future decision to purchase/choose a new automated liquid handler.
- Cost of pipette tips has led some respondents to consider purchasing an acoustic liquid handler.
- The majority never reuse disposable tips i.e. they use for one liquid handling step then discard.
- The majority have not used or considered tip regeneration methods to reduce disposable tip costs.
- A bottom-up model was developed to estimate the market for disposable tips for automated liquid handlers using respondent data on their budgets derived from this survey. In 2015 the market was estimated to be in the region of \$200M.
- Some feedback on unmet needs or issues encountered related to sourcing or using disposable tips for automated liquid handlers was documented.
- The full report provides the data, details of the breakdown of the responses for each question, its segmentation and the estimates for the future (2018). It also highlights some interesting differences between survey groups.
- PLEASE NOTE: This survey covers disposable pipette tips used with automated liquid handling instruments.

It does NOT cover pipette tips used with hand-held (manual and electronic) pipettors.

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