



Specialist Investment Banking for
Healthcare and Life Sciences

US \$15 bn Opportunity by 2030: Software for Pharma Labs, Diagnostic Labs and Clinical Trials

An Analysis of Key Trends and M&A Deal Activity

November 2024

About TH Healthcare

TH Healthcare & Life Sciences is a division of **Technology Holdings, a global investment bank** focused exclusively on providing M&A advisory, growth equity solutions, private equity advisory and growth consulting to **Healthcare & Life Sciences**, technology services, business process management, consulting and technology companies globally.

TH has a global team of over 80 people across nine countries including UK, USA, France, Germany, Sweden, Canada, Spain, India and Australia.

Our focus, with a 23-year track record...



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INTRODUCTION:

SECTION 1: MARKET OVERVIEW

- **Market Snapshot:** An in-depth look at the current state of the market, highlighting key players, technological advancements, and market size
- **2023 Trends and 2024 Outlook:** Analyze the major developments of 2023 and provide an informed outlook for 2024, focusing on continued innovations and market shifts

SECTION 2: M&A ACTIVITY ANALYSIS

- **Recent Transactions Review:** Examine M&A transactions over the last three years, identifying critical trends and notable deals that illustrate the market's trajectory
- **M&A Trends:** Utilize data-driven insights to highlight recurring themes and strategic moves within the M&A landscape and provide a perspective on how these trends provide investment opportunities and challenges in the evolving life sciences tools sector

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Introduction

This research report from TH Healthcare & Life Sciences analyses software solutions within Pharma R&D labs, Diagnostic labs, and Clinical Trial Suites; we explore market opportunities, technology trends, and M&A activities shaping these sub-sectors within healthcare and life sciences.

For the purposes of this report, we classify and define the categories as follows.

DIAGNOSTIC LABORATORIES

It specialize in performing tests on biological specimens, such as blood, tissue, and urine, to detect, diagnose, and monitor diseases. These labs provide essential data for patient care and disease management. ***Diagnostic lab software*** typically includes laboratory information systems (LIS) and automation solutions for workflow management, test reporting, and integration with healthcare information systems (HIS).

PHARMACEUTICAL LABORATORIES

These are facilities where scientists and researchers conduct experiments and analyses to discover, develop, and test new drugs and therapies. These labs focus on chemical and biological processes, including drug formulation, quality control, and stability testing. ***Software solutions in pharma labs*** include laboratory information management systems (LIMS), electronic laboratory notebooks (ELNs), and scientific data management systems (SDMS), which streamline data collection, analysis, and regulatory compliance.

CLINICAL TRIAL SOFTWARE

It refer to the comprehensive software systems used to manage the various stages of clinical research, from trial design to data collection and regulatory submission. These solutions include clinical trial management systems (CTMS), electronic data capture (EDC) platforms, and randomization and trial supply management (RTSM) tools. They ensure the accurate execution, monitoring, and reporting of clinical trials in compliance with regulatory standards.

DRUG DISCOVERY SOFTWARE

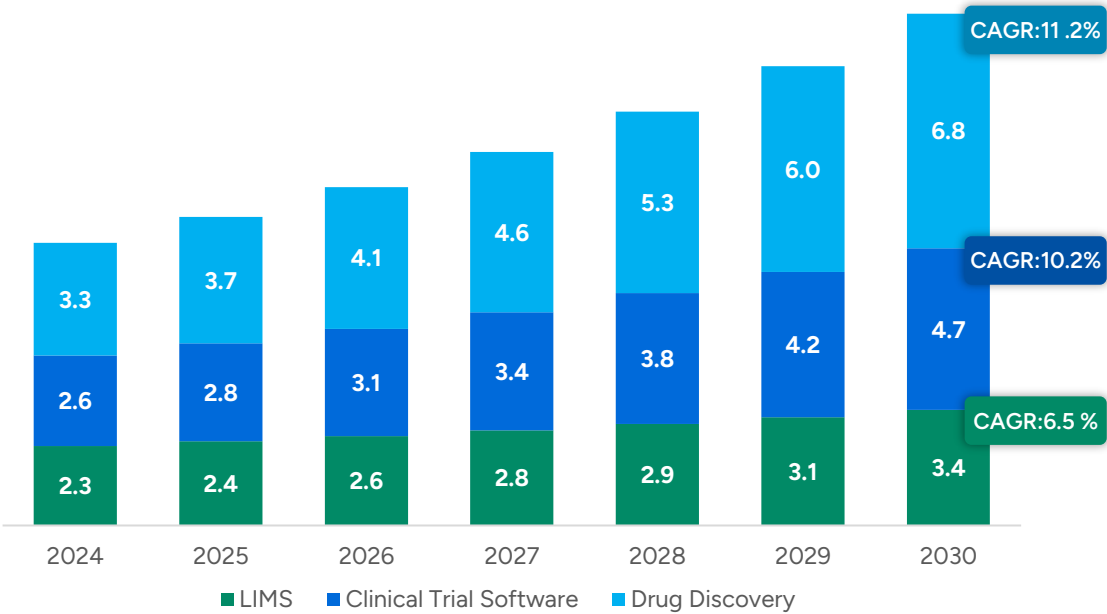
It refers to specialized tools designed to accelerate the identification, testing, and development of new drug candidates. These software solutions facilitates key processes such as molecular modeling, virtual screening, structure-activity relationship (SAR) analysis, and bioinformatics. Drug discovery platforms integrate computational chemistry, simulation tools, and data analysis to streamline workflows, optimize compound design, and predict drug interactions. These solutions play a critical role in reducing the time and cost associated with bringing new therapies to market.

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Market Snapshot : The Growth Trajectory of the Life Sciences Tools Market (2024-2030)

Market Size Growth	Combined market size for LIMS, Clinical Trial Software, and Drug Discovery expected to grow from \$8.2 bn in 2024 to 14.8 bn by 2030
LIMS Expansion	Driven by rising lab automation, regulatory compliance demands, and technological advancements, growing from \$2.3 bn to \$3.4 bn by 2030
Clinical Trials Software Surge	Market expected to rise from \$2.6 bn in 2024 to \$4.7bn by 2030, fueled by regulatory changes, pharma sponsor priorities and decentralized trials
Drug Discovery Tools Growth	Projected to increase from \$3.3 bn in 2024 to \$6.8 bn by 2030, driven by AI, in-silico modeling, and COVID-19 efforts
Technological Advances	Innovations like next-generation sequencing and CRISPR-Cas9 are driving demand for advanced life sciences tools
Impact of Digital Collaboration	Accelerated vaccine development during COVID-19 showcased the importance of digital tools in life sciences
Personalized Medicine	Rising demand for personalized treatments continues to fuel the growth of specialized diagnostic and therapeutic tools
Government and Industry Synergy	Collaboration among academia, industry, and government boosts innovation, particularly in clinical trials and LIMS

Life Sciences Tools and Software Market Size and Growth in \$ Bn





Automation



Data Analysis



Single Cell Analysis



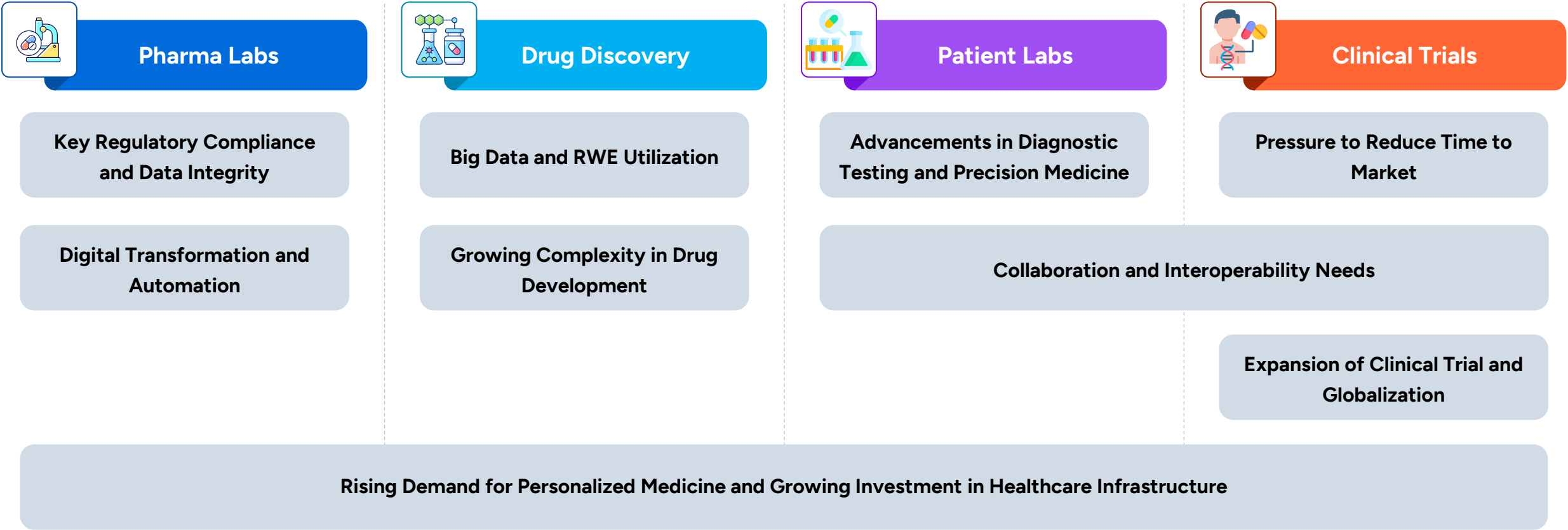
CRISPR Technology



Multi-Omics Approaches

Driving the Future by Innovation, Collaboration and Market Expansion in Life Sciences – From \$8.2 bn to \$14.8 bn

Drivers Shaping Software and Tools in Patient Labs, Clinical Trials, Pharma Labs & Drug Discovery



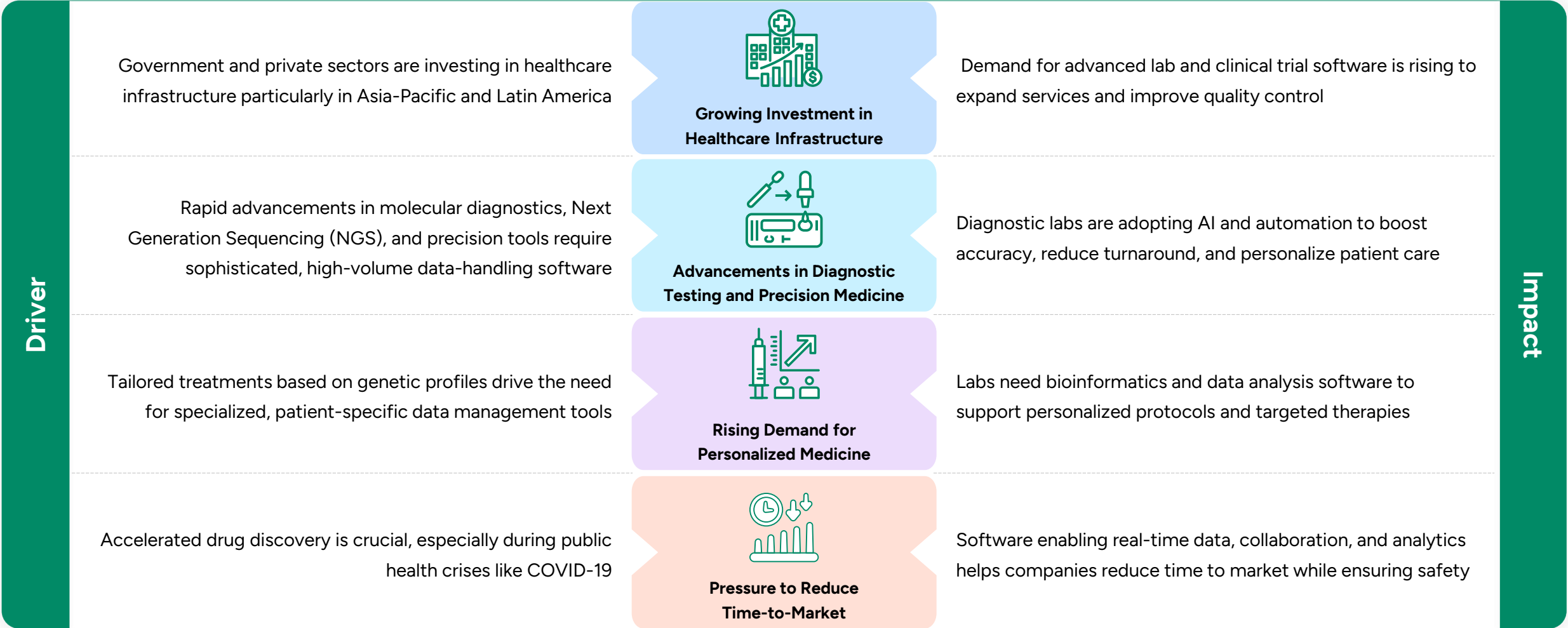
Personalization and digitization driving efficiencies – Preparing for a data-driven globalized future

Key Macro Drivers & Their Impact on Pharma Labs & Drug Discovery Software

Driver	Rising GxP, HIPAA, and GDPR requirements drive adoption of advanced data management solutions for compliance and patient privacy	 Regulatory Compliance and Data Integrity	Sophisticated software enhances data integrity, provides audit trails, and ensures regulatory compliance, aiding certification	Impact
	Industry-wide digitalization is pushing pharma and diagnostics toward IoT, cloud, and big data integration	 Digital Transformation and Automation	Automated workflows, real-time data processing, and cross-platform integration streamline operations, reduce errors, and boost efficiency	
	Personalized medicine and biologics demand advanced data analysis, automation, and real-time tracking in labs and trials	 Growing Complexity in Drug Development	LIMS, CTMS, and bioinformatics tools manage vast data, accelerate development, and enhance accuracy	
	The use of real-world data in trials is driving demand for systems that manage large, complex datasets	 Big Data and Real-World Evidence (RWE) Utilization	Advanced analytics, AI, and ML optimize RWE, speeding up drug development and decision-making	
	Increased collaboration across pharma, CROs, and diagnostics requires interoperable software for data integration	 Collaboration and Interoperability Needs	Cloud-based, open-architecture solutions enable seamless data exchange, real-time collaboration, and shared insights	

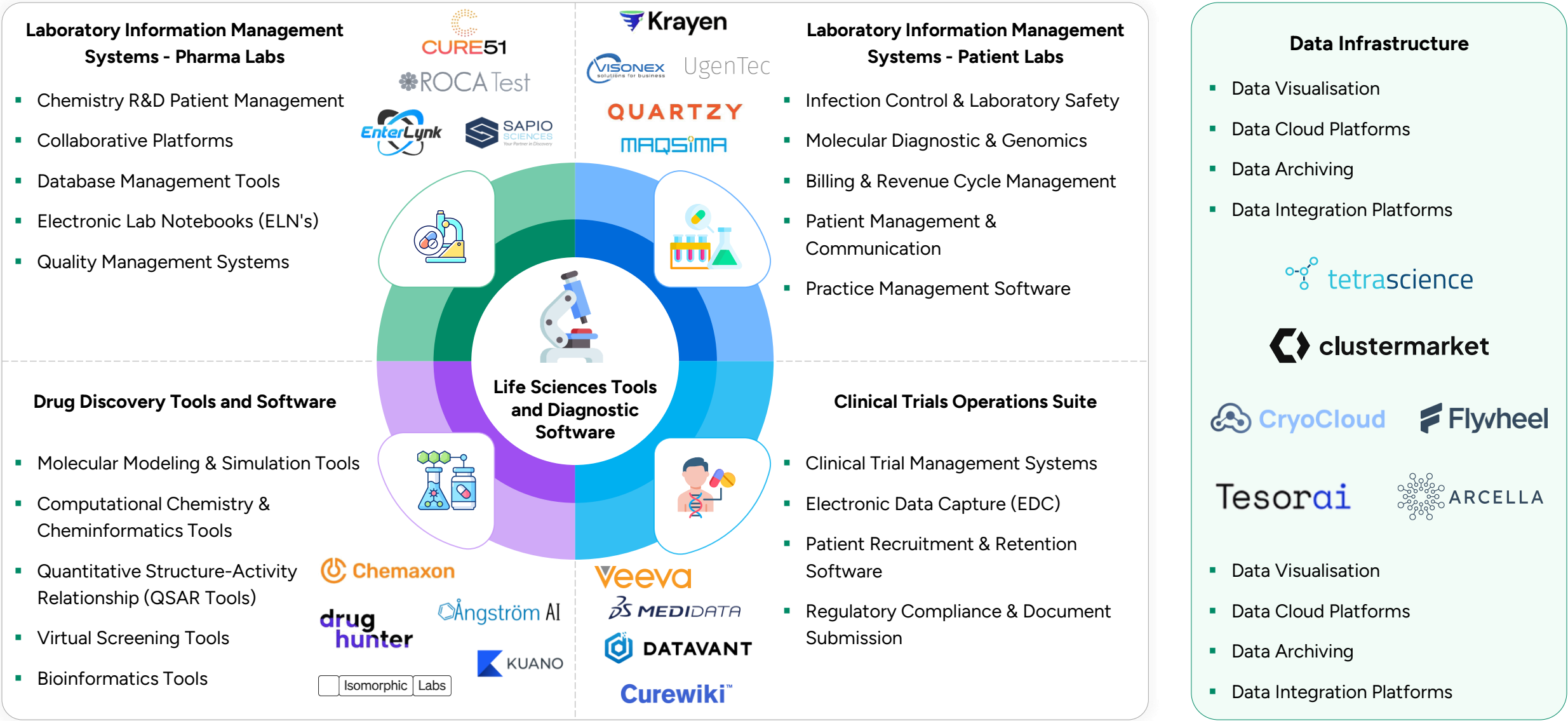
From compliance to collaboration – leveraging data and technology for innovation.

Key Macro Drivers & Their Impact on Patient Labs & Clinical Trials Software



Driving innovation in Patient Labs and Clinical Trials: Investing in technology to accelerate personalized care and time to market

Life Sciences Tools by Market Segments

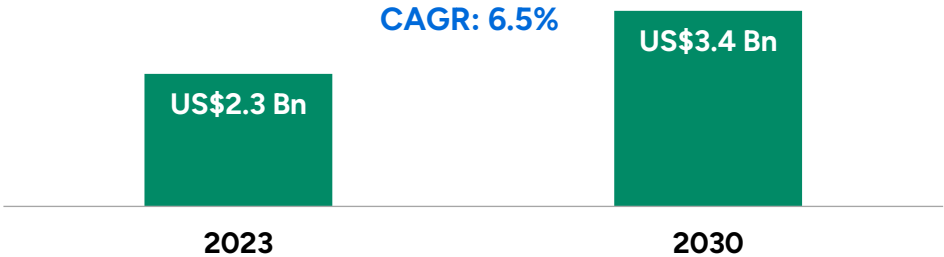


Market Size and Growth by Life Science Segments

Laboratory Information Management Systems - Pharma Labs

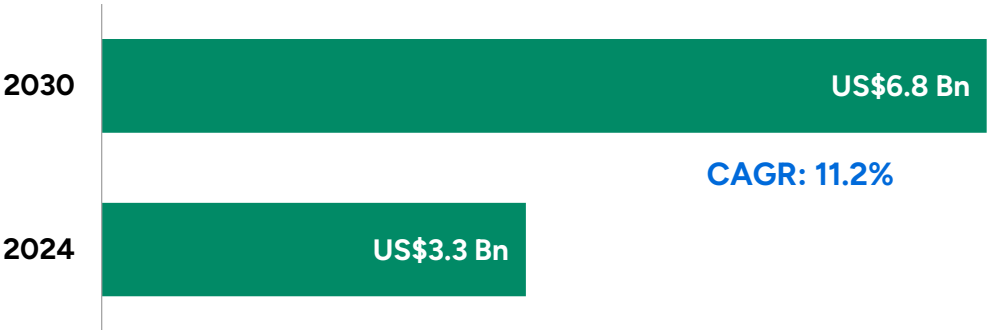


Laboratory Information Management Systems - Patient Labs



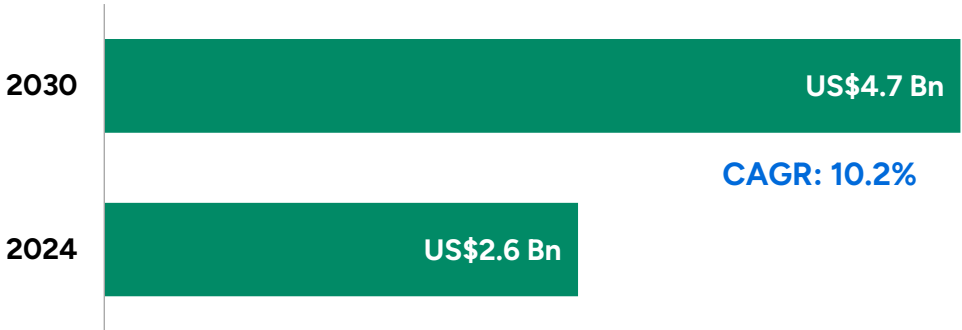
Source: LIMS Global Market Report 2024, The Business Research Company

Drug Discovery Tools and Software



Source: Drug Discovery Outsourcing Market Size, 2024. Precedence Research

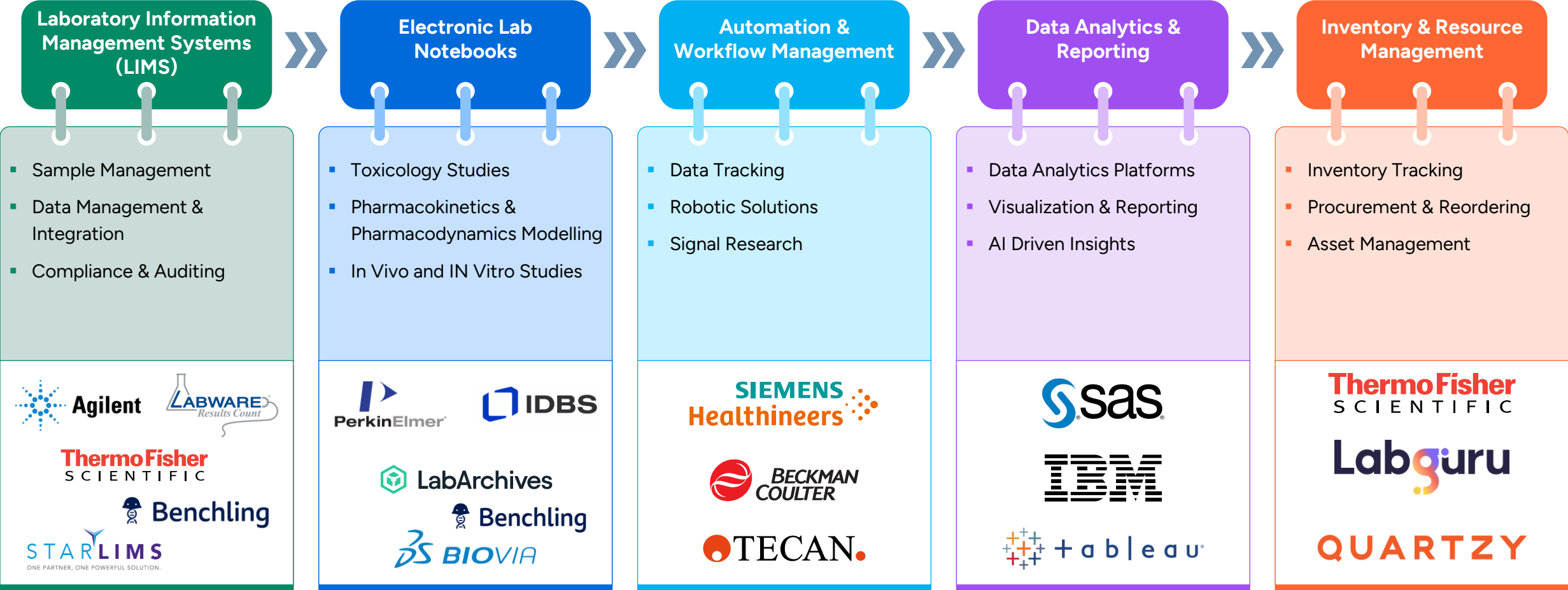
Clinical Trials Operations Suite



Source: Clinical Trial Management System Market Size., Grandview Research

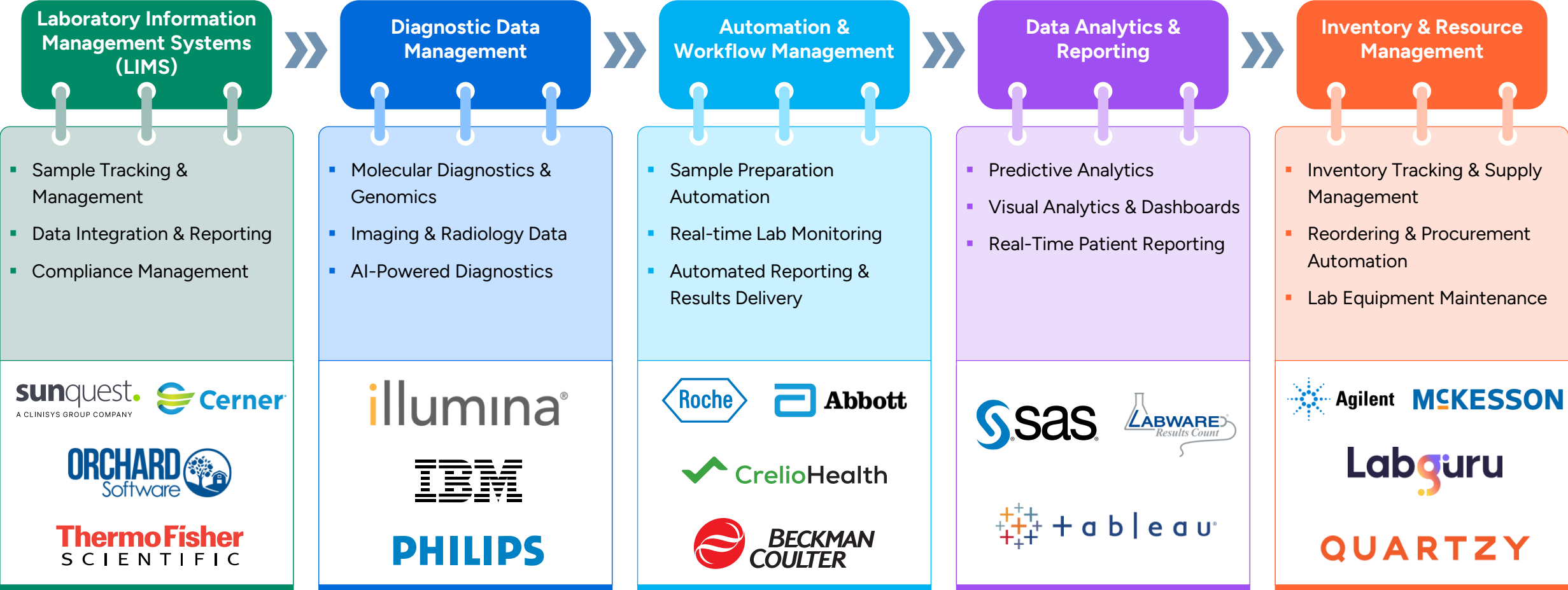
Life sciences software segments project robust growth, driven by innovation in LIMS, drug discovery and clinical trials solutions

Pharma Labs Software Value Chain: Enhancing Workflow and Productivity



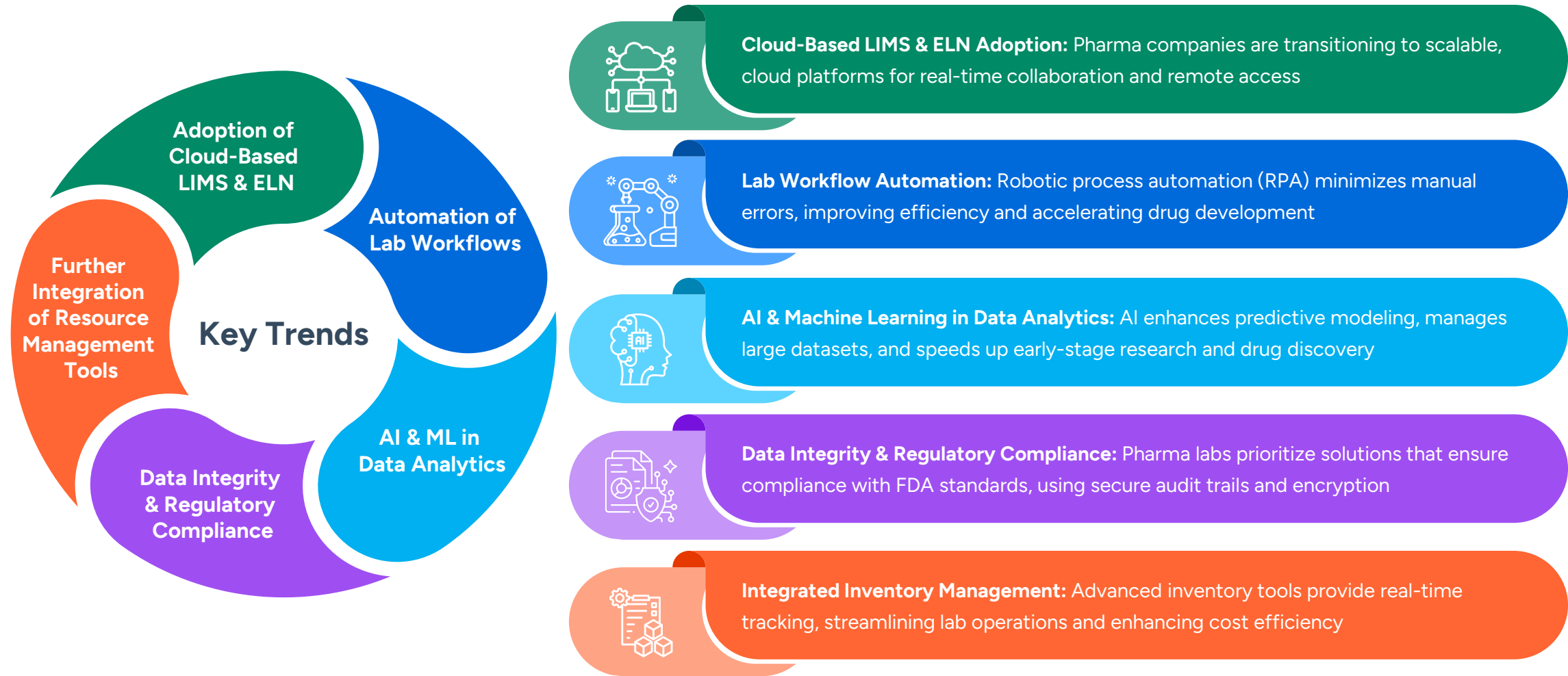
Optimizing lab operations through advanced workflow solutions: Driving efficiency, automation, data management in pharma labs

Patient Labs Software Value Chain: Enhancing Workflow and Diagnostic Efficiency



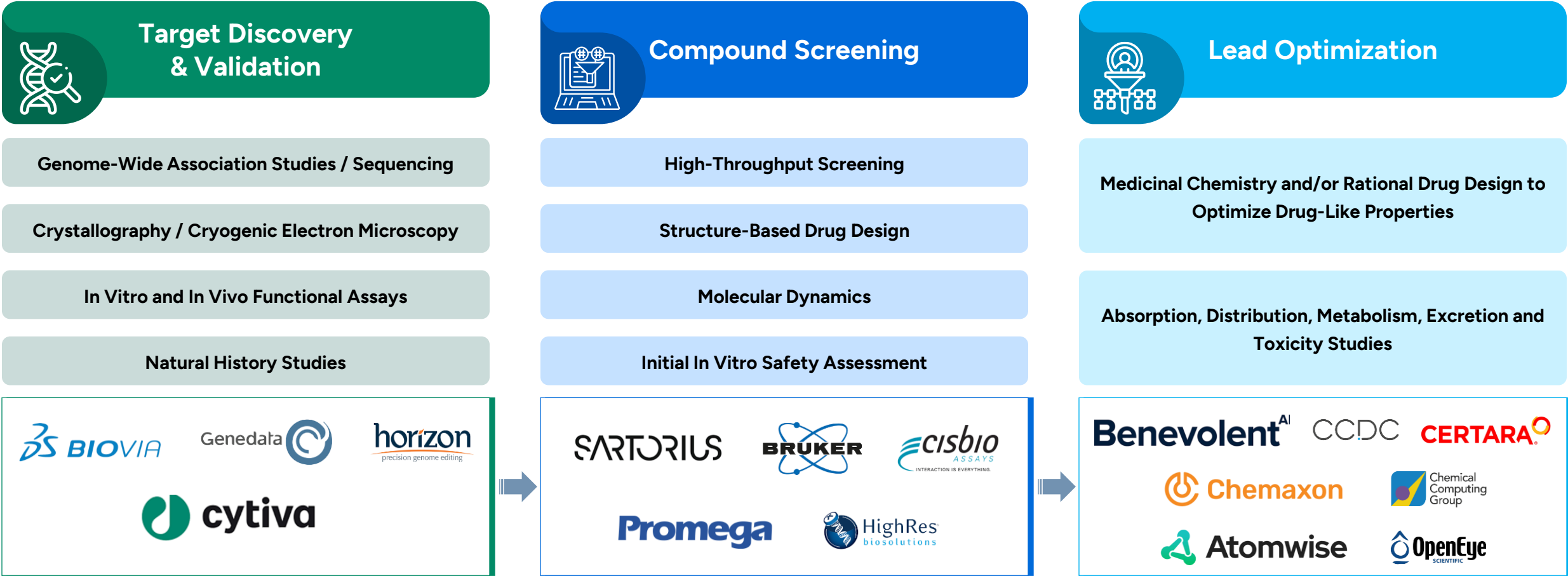
Driving Efficiency in Patient Labs: Advanced Software Solutions for Diagnostic Precision and Workflow Automation

Key Trends Powering Growth and Innovation in Pharma R&D & Patient Diagnostic Labs



Cloud, Automation and AI are reshaping lab operations – Improving efficiency, compliance and collaboration

Drug Discovery Software Across the Processes: Bringing Efficiency and Accuracy



Driving Innovation in Drug Discovery: From target identification to lead optimization through advanced technologies

Revolutionizing Drug Discovery: Advanced Technologies Set to Propel Market Growth

Key Trends Driving Growth of Drug Discovery Software



AI and Machine Learning in Drug Discovery

AI is transforming drug discovery by analyzing **large datasets, predicting drug-target interactions**, and **optimizing lead compounds**, significantly shortening early-stage timelines



Rise of Phenotypic Screening Over Traditional Target-Based Screening

The resurgence of **phenotypic screening** allows for the discovery of new drug mechanisms by assessing compounds' overall biological effects, pushing innovation in first-in-class drugs



CRISPR and Gene Editing Technologies for Target Validation

CRISPR-Cas9 and other gene-editing technologies are accelerating target validation by enabling precise manipulation of genes, confirming the role of specific proteins in disease mechanisms

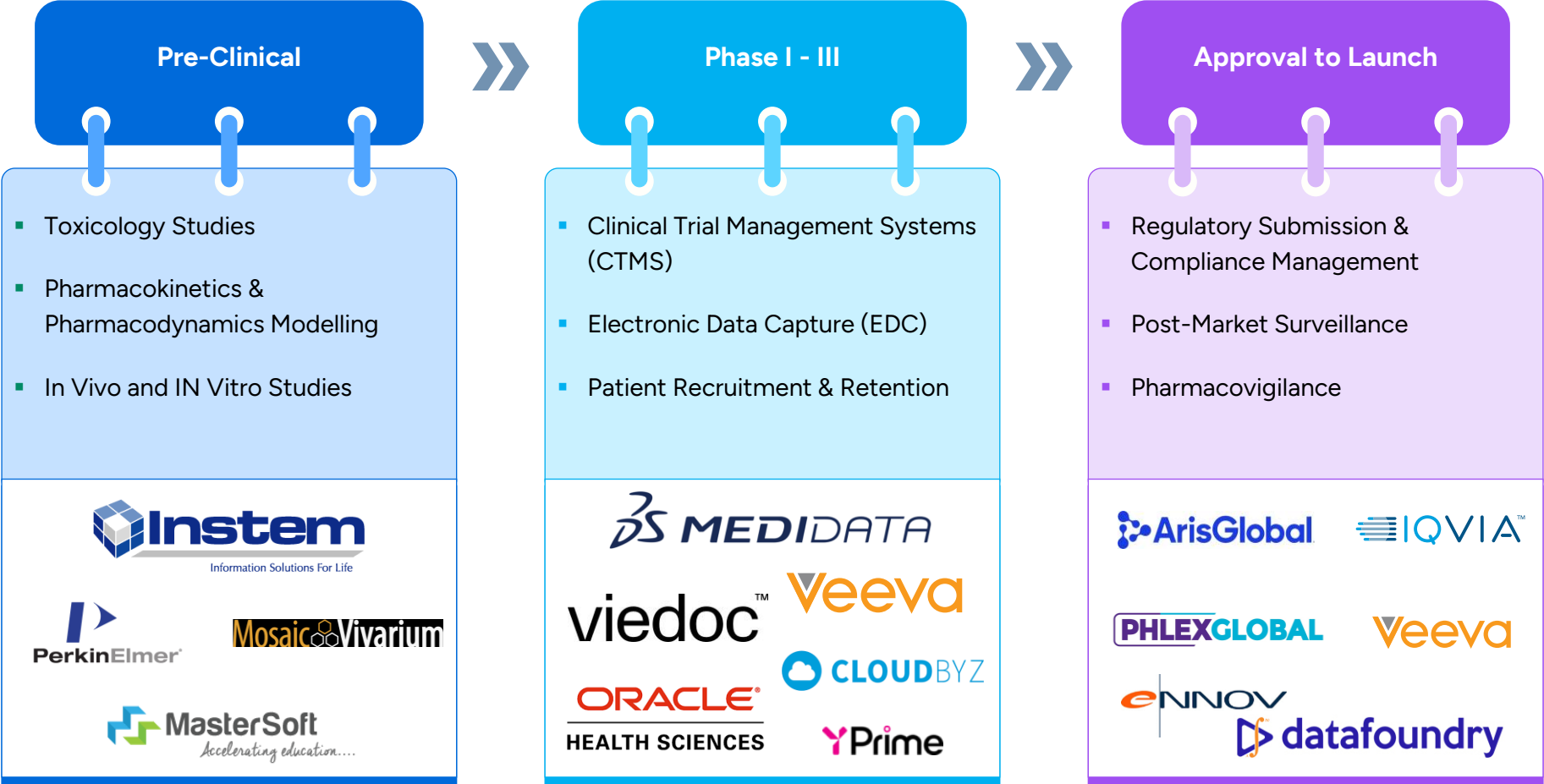


High-Throughput and Automation in Compound Screening

HTS combined with robotics and automation speeds up compound screening, allowing for cost-effective testing of vast libraries, which enhances the drug discovery pipeline from hit identification to lead optimization.

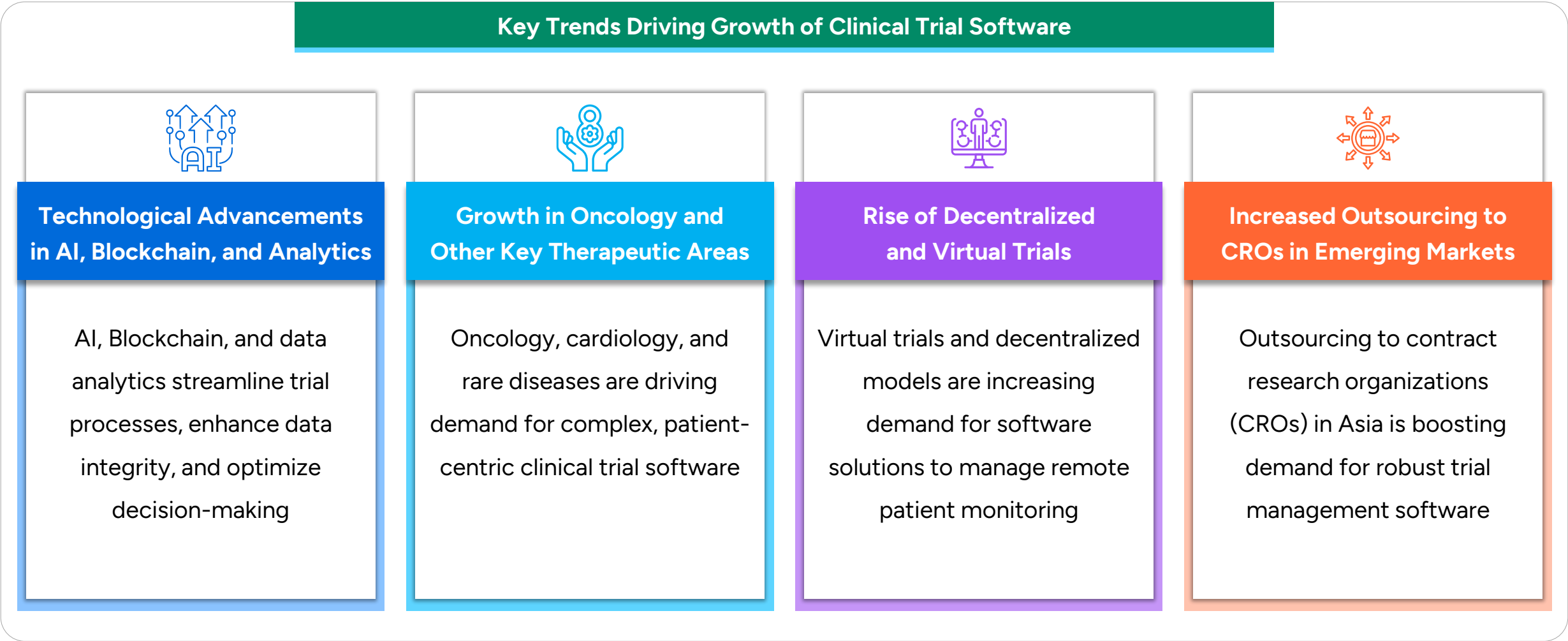
AI, CRISPR and automation are transforming drug discovery, driving innovation and accelerating market expansion

Clinical Trials Value Chain: Key Functions and Technology Solutions



Enabling Innovation and Efficiency: Technology driving clinical trials from lead optimization to market approval

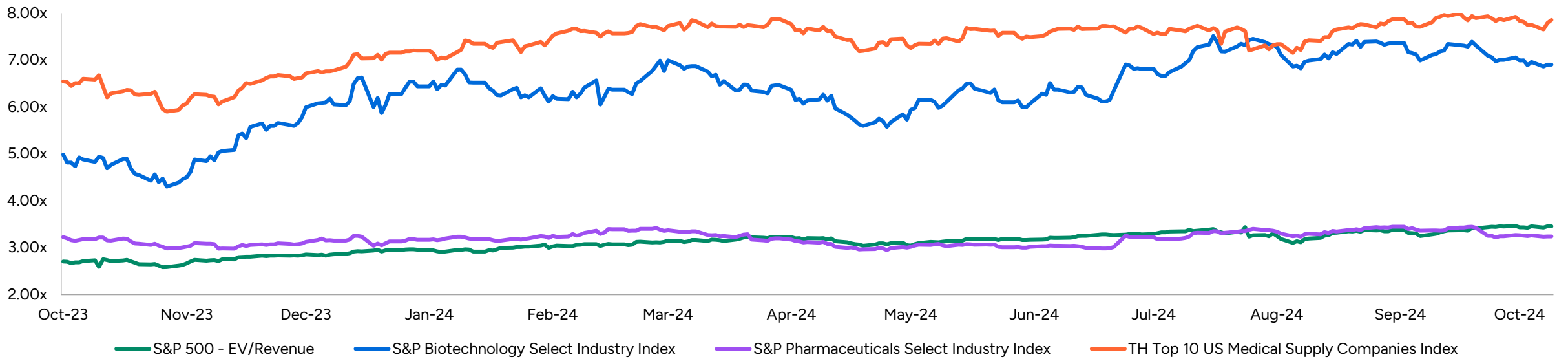
Key Trends Fuelling Growth in the Clinical Trial Software Market



Emerging technologies, therapeutic advances and decentralized trials are shaping the future of clinical trials

Valuation Dynamics: EV/Revenue Trends Across Life Sciences and Broader Markets

Revenue Multiples Comparison for Select Life Sciences Sectors Index



- S&P 500 saw a consistent rise, peaking at 7.3x in September 2024, driven by earnings and resilience
- S&P Pharmaceuticals Index remained stable, moving from 3.23x in 2023 to 3.24x in October 2024
- **S&P Biotechnology Index** rose from 2.71x to 3.47x, fueled by investments in personalized medicine and novel therapies
- **TH Top 10 Medical Supply Index** showed steady growth, driven by innovation and demand in medical technologies

TH Top 10 US Medical Supply Companies Index

Abbott

INTUITIVE

stryker

GE HealthCare

Boston Scientific

BD

IDEXX LABORATORIES

Medtronic

Edwards

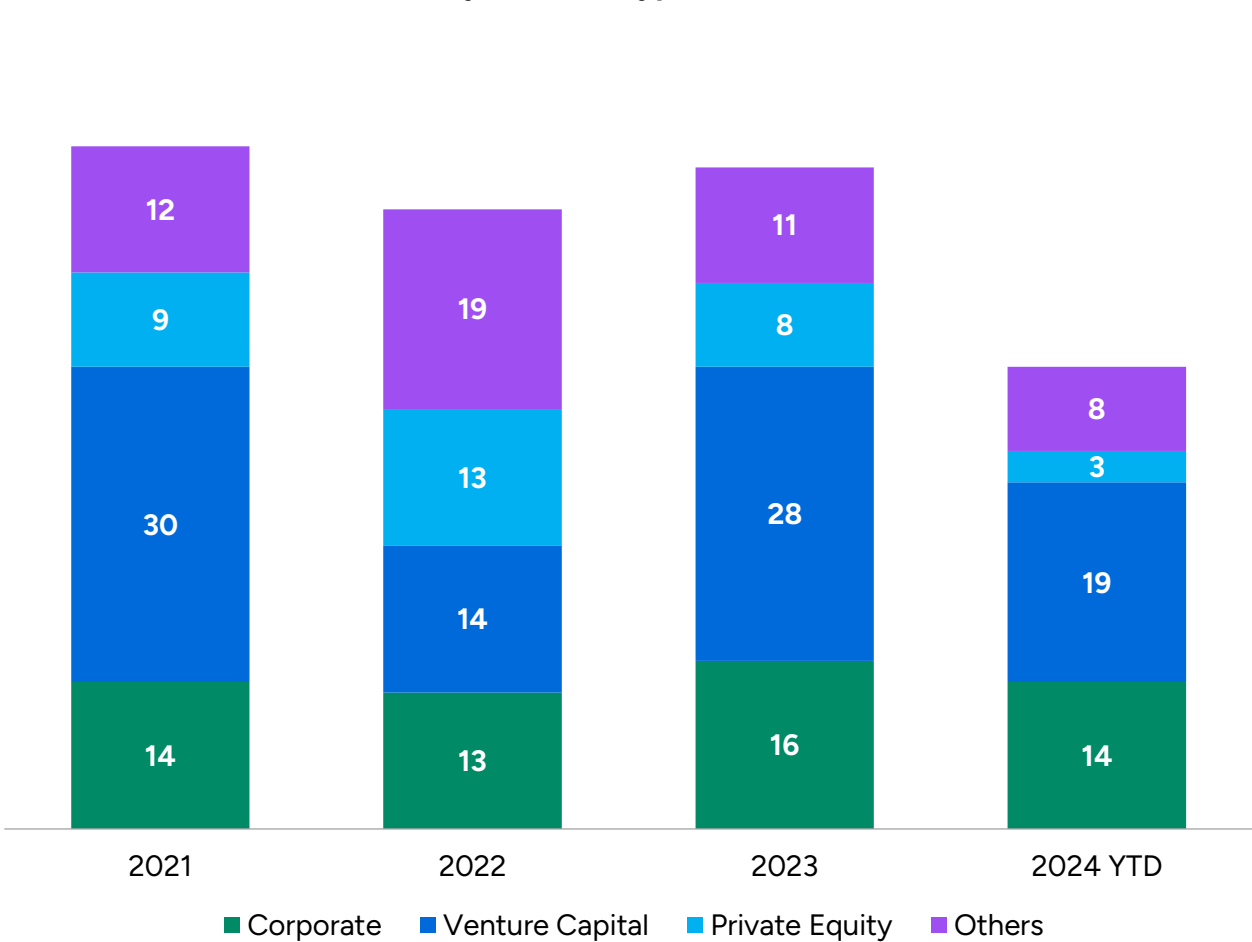
ResMed

Valuations in Life Sciences show consistent growth, driven by earning resilience, innovation and investments in personalized medicine and novel therapies.

M&A Activity Trends in Life Science Tools & Diagnostics (2021-2024)

- Corporate deals showed fluctuation, peaking at **16 deal activity in 2023** and remaining steady in 2024
- Venture capital funding saw a **decline from 30 deals** in 2021 to **19 deals** in 2024
- Other investor types, including debt companies, exhibited variability across the years
- Highlight deal: ChemAxon acquired by Certara for **\$90 mn** in 2024, strengthening its foothold into drug discovery biosimulation

Number of M&A Transactions by Investor Type



Year-Wise M&A Transactions

231
2021-YTD 24

59
2022

63
2023

44
2024 (YTD)

Analyzing investor trends in M&A activities reveals strategic shifts and market dynamics

M&A Activity by Subsegment in Life Sciences Tools & Diagnostics (2021-2024)

Clinical Trial Operations Suite:

- 42 deals in 2021, declining to 11 YTD 2024
- Positioned for growth amidst rising R&D spend and trial complexity

LIMS Pharma Labs:

- Stable M&A activity with 7 deals in 2021 and 7 YTD 2024.
- Trends include integration with instruments and AI/ML adoption.

LIMS Patient Labs:

- Growing from 3 deals in 2021 to 6 YTD 2024
- Focus on infection control, genomics, and revenue cycle management

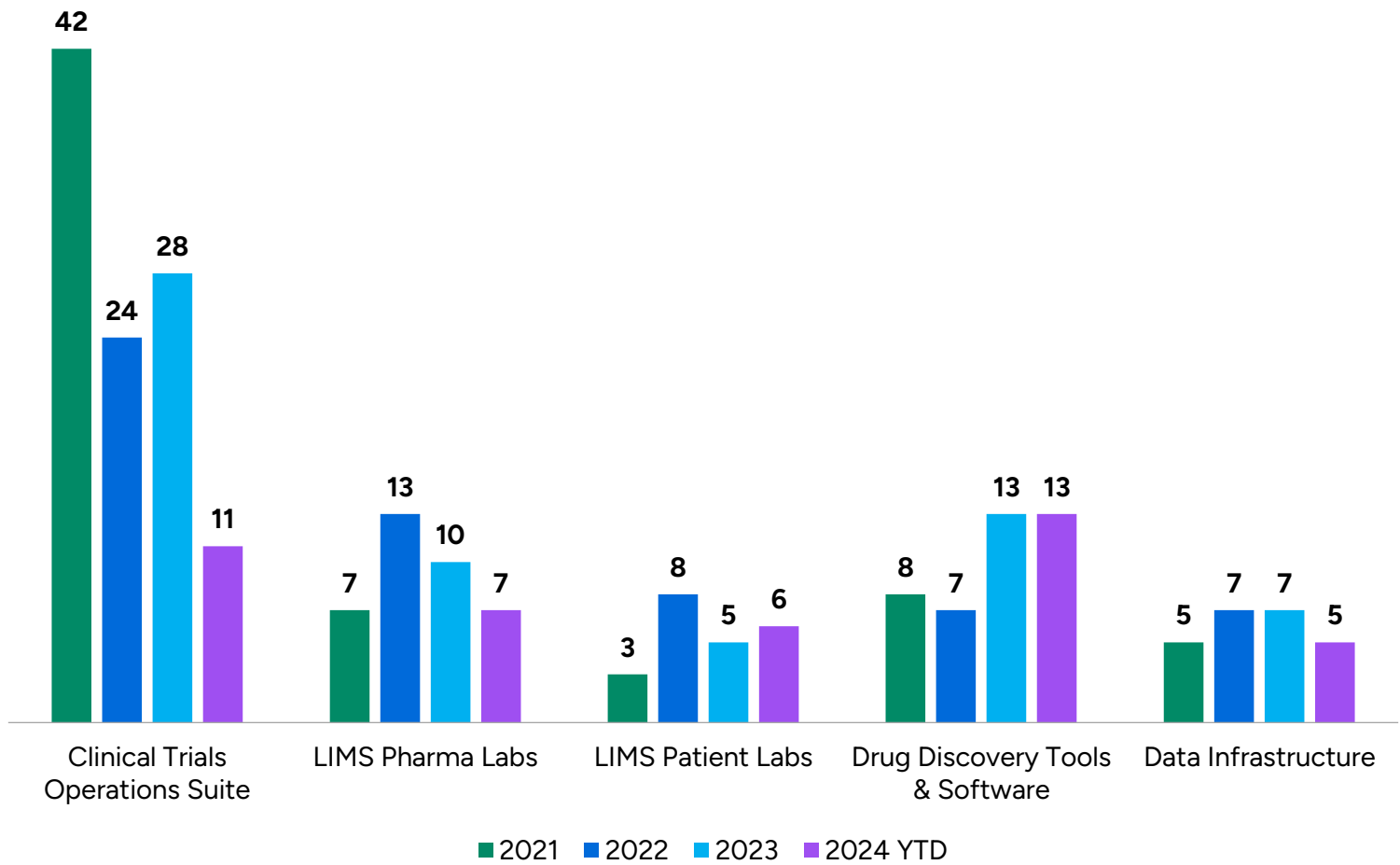
Drug Discovery Tools & Software:

- Consistently growing, 13 deals as of September 2024
- Driven by advancements in molecular modeling and AI applications

Data Infrastructure:

- Consistent activity, with 5 deals annually
- Emphasis on data integration and cloud platforms for enhanced analytics

M&A Activity by Life Sciences Sub-segments

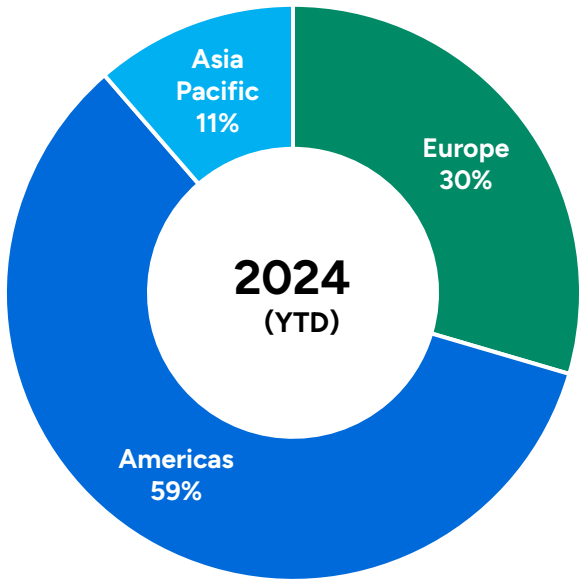
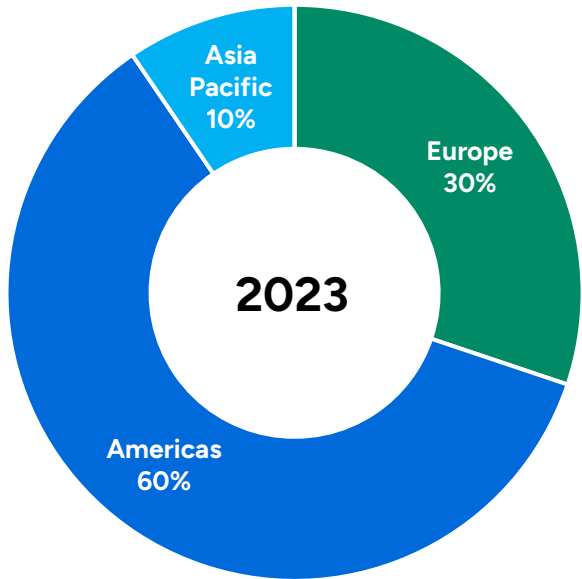


Analyzing M&A trends in subsegment reveals strategic priorities ana market dynamics

M&A Activity by Geography

- **Americas Shift:** Share adjusted from **60%** in 2023 to **59% YTD 2024**, reflecting evolving global dynamics in healthcare investments and digital transformation
- **European Growth:** Stable at **30%** in 2023 and YTD 2024, driven by regulatory initiatives and advancements in clinical trial efficiencies
- **Asia Pacific Expansion:** Slight rise from **10%** in 2023 to **11% YTD 2024**, highlighting the region's emergence as a pivotal player in global clinical research and AI integration
- **Strategic Investments:** North America's leadership in CTMS underscores its pivotal role in global clinical trial management, attracting significant M&A interest
- **Regional Dynamics:** Europe's regulatory frameworks and technological innovations enhance market attractiveness, influencing strategic M&A decisions
- **Emerging Markets:** Asia Pacific's rapid expansion reflects a shifting global landscape towards decentralized trials and advancements in AI-driven healthcare solutions

M&A Deal Activity (%) by Geography



North America

Leading in Clinical Trials Management Systems adoption with advanced research institutions and supportive policies fostering clinical trials and digital health innovation

Europe

Growing adoption of Clinical trials management systems driven by regulatory support and technological advancements, particularly in the UK and Germany

Asia Pacific

Rapidly expanding CTMS and drug discovery market driven by robust research activities, AI investments, and partnerships, particularly in China and Japan

We see an increased appetite for consulting and data analytics services specialists

Strategic Acquisition: Scaling Innovation in Life Sciences with GHO Capital and Certara

 Acquired by 	 Company Specialization  Innovative Technology  Unique Impact  Strategic Importance  Investor Motivation  Outcome for Investors	 Acquired by 	Chemaxon provides cheminformatics software used by major pharmaceutical companies for molecular design and drug development Chemaxon’s Marvin software helps estimate the physicochemical properties of molecules, streamlining drug design and discovery Integration with Certara’s AI capabilities enhances Chemaxon’s ability to incorporate machine learning, speeding up drug development decisions Certara acquires Chemaxon to strengthen its drug research software portfolio, focusing on biosimulation and generative AI capabilities Certara aims to reduce drug development costs and risks while accelerating the process with Chemaxon’s innovative solutions The acquisition enables Certara to integrate AI and cheminformatics, enhancing their ability to deliver cutting-edge drug development tools
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Fuelling growth through innovation: M&A strategies shaping the future of drug discovery and lab informatics

M&A Activity Analysis: (Jan 2023 – Sep 2024) (1/5)

Deal Date	Companies	Investors	Segmentation	Deal Size*	HQ
Strategic Acquisition					
Sep 2024			Clinical Trials Operations Suite	NA	
Aug 2024			Drug Discovery Tools & Software	\$688.0	
Jul 2024			Drug Discovery Tools & Software	€44.0	
Jul 2024			LIMS Patient Labs	KRW 12.3	
Jun 2024			LIMS Patient Labs	NA	
Jun 2024			LIMS Pharma Labs	NA	
Apr 2024			LIMS Pharma Labs	NA	
Mar 2024			LIMS Patient Labs	NA	
Mar 2024			LIMS Pharma Labs	CNY 4.5	
Feb 2024			Drug Discovery Tools & Software	NA	
Feb 2024			Drug Discovery Tools & Software	\$2.4	
Jan 2024		Undisclosed Investors	LIMS Patient Labs	£7.9	

M&A Activity Analysis: (Jan 2023 – Sep 2024) (2/5)

Deal Date	Companies	Investors	Segmentation	Deal Size*	HQ
Strategic Acquisition					
Jan 2024			Data Infrastructure	NA	
Sep 2023			Data Infrastructure	NA	
Jul 2023			Clinical Trials Operations Suite	NA	
Jul 2023			LIMS Pharma Labs	NA	
Jun 2023			LIMS Patient Labs	\$392.0	
May 2023			Clinical Trials Operations Suite	NA	
May 2023			LIMS Patient Labs	\$40.0	
Apr 2023			Drug Discovery Tools & Software	KRW 23.0	
Feb 2023			LIMS Patient Labs	NA	
Feb 2023		Undisclosed Investors	LIMS Pharma Labs	NA	
Jan 2023			LIMS Pharma Labs	NA	
Jan 2023			LIMS Patient Labs	NA	

M&A Activity Analysis: (Jan 2023 – Sep 2024) (3/5)

Deal Date	Companies	Investors	Segmentation	Deal Size*	HQ
Venture Capital Investment Activity					
Sep 2024	Qualifyze	INSIGHT PARTNERS	Drug Discovery Tools & Software	\$54	
Sep 2024	LedgerRun	BLUE STAR INNOVATION PARTNERS	Clinical Trials Operations Suite	NA	
Jun 2024	Formation Bio	andreessen horowitz Emerson Collective fpv LACHY GROOM sanofi SVAngel SEQUOIA THRIVE CAPITAL	Clinical Trials Operations Suite	\$372.0	
Jun 2024	Qubit PHARMACEUTICALS	European Innovation Council	Drug Discovery Tools	€8.7	
Jun 2024	RIBO	Gaingels	Drug Discovery Tools	NA	
May 2024	Pyte	innovation endeavors Liberty Mutual STRATEGIC VENTURES MYRIAD pillar	Data Infrastructure	\$5.00	
Apr 2024	Labguru	Battery	LIMS Pharma Labs	NA	
Apr 2024	Tesorai	NEW STACK VENTURES NG VP	Data Infrastructure	\$0.16	
Mar 2024	CURE51	CENTRE BERARD LEON HITACHI Inspire the Next kima ventures LifeX Ventures Sofinnova partners	LIMS Pharma Labs	€15.0	
Mar 2024	drug hunter	Undisclosed	Drug Discovery Tools	\$0.8	
Mar 2024	DentiQube	CNT TECH theventures	LIMS Patient Labs	NA	
Feb 2024	Beyond Therapeutics PLC	ROOT/VENTURES	Drug Discovery Tools	NA	

M&A Activity Analysis: (Jan 2023 – Sep 2024) (4/5)

Deal Date	Companies	Investors	Segmentation	Deal Size*	HQ
Venture Capital Investment Activity					
Feb 2024		 Alumni Ventures IAG CAPITAL PARTNERS   GRADIENT  	Data Infrastructure	\$227.4	
Nov 2023		 WENDEL 	Drug Discovery Tools	€32.3	
Nov 2023		Undisclosed Investors	LIMS Pharma Labs	\$6.7	
Oct 2023		Undisclosed Investors	Clinical Trials Operations Suite	NA	
Aug 2023		 BlackRock   Harpoon  	Drug Discovery Tools	\$224.0	
Aug 2023		Undisclosed Investors	Drug Discovery Tools	NA	
Aug 2023		 CREANDUM   Seedcamp 	Clinical Trial Operations Suite	£17.6	
Aug 2023	Decode.bio	 	Drug Discovery Tools	NA	
Aug 2023		Undisclosed Investors	Clinical Trials Operations	NA	
Jun 2023		   Hewlett Packard Enterprise     	Data Infrastructure	\$54.3	
Apr 2023	Within3	Undisclosed Investors		NA	
Apr 2023		 	Data Infrastructure	£2.0	

M&A Activity Analysis: (Jan 2023 – Jul 2024) (5/5)

Deal Date	Companies	Investors	Segmentation	Deal Size*	HQ
Private Equity Investment Activity					
Jul 2024			Clinical Trail Operations Suit	NA	
Nov 2023			Clinical Trail Operations Suit	£248.9	
Nov 2023			Data Infrastructure	NA	
Oct 2023			Clinical Trail Operations Suit	NA	
Sep 2023			Clinical Trial Operations Suit	NA	
Sep 2023		 	LIMS Patient Land	NA	
Apr 2023	 		Clinical Trials Operations Suite	NA	
Feb 2023			LIMS Pharma Labs	NA	

Key Takeaways

The life sciences tools and diagnostics market is set for sustained growth, driven by increasing R&D investments, advancements in precision medicine, and technological innovations like AI and automation. This growth is reflected across key segments such as patient labs, pharma labs, and drug discovery, each evolving rapidly with specific trends and drivers



Patient Labs

- **Growth Drivers:** Rising demand for personalized medicine and advancements in diagnostic technologies like NGS and AI-powered diagnostics
- **.Key Trends:** Automation of workflows, real-time reporting, and increasing integration with healthcare systems



Pharma Labs & Drug Discovery

- **Growing use of cloud-based LIMS** and ELN systems for scalability and real-time collaboration.
- **AI and machine learning** enhance predictive modeling, accelerating drug discovery and early-stage research
- **Increased focus on data integrity** and regulatory compliance to meet FDA and other global standards



Clinical Trials

- Decentralized and patient-centric trials drive demand for clinical trial management software (CTMS)
- AI, Blockchain, and IoT improve trial logistics, patient monitoring, and data security, optimizing trial success rates
- Investment in specialized therapeutic areas like oncology is expanding, fuelling trial software innovations



M&A Activity

2024 M&A deals: 44 M&A deal activity by Q3 2024, showing an increasing trend in strategic acquisitions.

Notable deals include **Certara's** acquisition of **Chemaxon** and **GHO Capital's** investment in **Sapio Sciences**.

The surge in M&A activity is driven by growing demand for **advanced life sciences tools and technologies**

TH Healthcare & Life Sciences' Transaction Track Record

Technology Holdings (TH) is exclusively focused on **M&A and capital raising advisory services to Healthcare Life Sciences, technology services, business process management, consulting and technology companies**. Over the last 23 years, TH has closed transaction with the most reputed healthcare and life sciences strategic buyers and private equity funds globally in 24 countries.

**Information Technology**
Deal of the Year
(under US \$100m)

**Professional Services**
Deal of the Year
(over US \$100m)

**Boutique Investment**
Bank of the Year Award

**Boutique Investment**
Bank of the Year Award

**M&A Deal of the Year Award**
(US \$100M –US \$250M)

**Cross-Border**
Deal of the Year Award

**Mid-Market M&A Advisory**
Firm of the Year Award

Life Sciences Transactions

MAY 2024



**THE KINETIX GROUP**

Has been acquired by

**petaurihealth**

**OAK HILL CAPITAL**
Portfolio Company

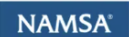
Life Sciences Commercialization & Marketing

MAR 2023



**SUAZIO**

Has been acquired by

**NAMSA**

**ARCHIMED**
PORTFOLIO COMPANY

Life Sciences & MedTech Consulting

JUN 2022



**C-CLEAR**
PARTNERS

Has been acquired by

**valantic**

Salesforce, Veeva & Microsoft Consulting

AUG 2022



**ATOM IDEAS**

Has been acquired by

**valantic**

Marketing Automation

DEC 2020



**WORRELL**

Has been acquired by

**Veranex**

**SUMMIT PARTNERS**
PORTFOLIO COMPANY

MedTech Design & Innovation Consulting

DEC 2020



**ACROSS HEALTH**

Has been acquired by

**PRECISION MEDICINE GROUP**

**Blackstone**
Portfolio Company

Life Sciences Omnichannel Consulting & Insights IP

AUG 2019



**U-sight**
A Design Innovation Consultancy

Has been acquired by

**Nemera**

Healthcare Innovation Consulting

DEC 2018



**blue latitude health**

Has been acquired by

**FISHAWACK HEALTH**

Strategic Healthcare Marketing Consultancy

JAN 2015



**DATA INTELLIGENCE**

Has been acquired by

**SCIO health analytics**

Life Sciences Analytics

NOV 2014



**Millennium**
Practice Management Associates, Inc.

Has been acquired by

**MediGain**
Gain Insight. Maximize Profit.

Healthcare Revenue Cycle Management

FEB 2011



**National Audit**
Healthcost Precision

Has been acquired by

**SCIO health analytics**

Health Claims Audit & Recovery

JUN 2008



**SCIO health analytics**

Has been acquired by

**SOLUCIA**

Healthcare Analytics & Consulting

MAY 2008



**SOCRATES, INC.**

Has been acquired by

**SCIO health analytics**

Payor Subrogation

CLICK HERE

TO VIEW ALL TRANSACTIONS

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