

Your market crystal ball: Insights found in tender analysis

By Tony Collins and Natalia Pan, GAMBICA



How procurement transparency is revealing laboratory market changes in the UK and Ireland

Public procurement has long been an important market for laboratory suppliers across the UK and Ireland. For years, public bodies have relied on formal tendering, while universities – often operating through individual institutions or even departments – often pursued their own smaller, decentralised purchasing routes.

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That divide is now narrowing. Stricter procurement rules and, notably, the rapid expansion of shared purchasing frameworks across university groups and public organisations have accelerated the shift toward formal tendering. As these frameworks gain traction, tender activity is rising, reshaping how laboratory suppliers need to approach access to and compete in the public sector market.

Particularly following the introduction of the UK Procurement Act 2023, improvements in procurement transparency have increased the availability and consistency of contract award information, making it possible to observe market trends with greater clarity than before.

Data analysis: Key trends identified

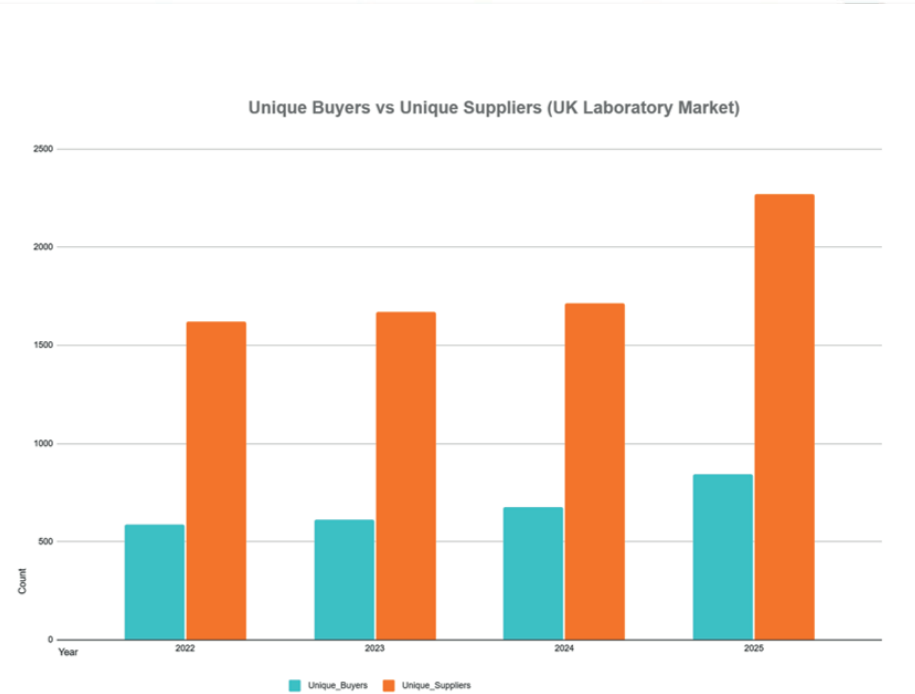
Analysis by GAMBICA of publicly available procurement data between 2022 and 2025 suggests that the laboratory market is not simply growing but widening. More organisations are purchasing laboratory equipment and services, and demand is emerging from a broader range of sectors than traditionally associated with laboratory procurement.

Healthcare organisations and government may still dominate laboratory purchasing by tender, but they're no longer the only players shaping demand. Procurement activity is now increasingly coming from public agencies, research initiatives and bodies with analytical or testing needs far beyond traditional lab settings. It's a shift fuelled by wider public sector investment in diagnostics, environmental monitoring and research infrastructure.

What stands out in the data is not just growth in procurement volumes, but a change in where that growth is coming from. While healthcare and academic institutions remain steady buyers, a rising share of laboratory related tenders is now driven by organisations operating in adjacent or emerging sectors. For suppliers, this marks a structural pivot: opportunity is expanding into areas where purchasing behaviour, competitive pressures and engagement timelines follow a very different rhythm to the traditional laboratory market.

The pool of suppliers competing for laboratory related contracts has grown noticeably, signalling a market that is both more open and more crowded. Greater transparency around contract awards now gives vendors earlier visibility of upcoming opportunities – and with that, the contest for business increasingly begins long before any tender officially appears.

Total contract values have risen noticeably in recent years, but the headline numbers don't always tell the full story. Large framework agreements and dynamic purchasing systems can inflate annual totals, even when day to day buying grows at a steadier pace. When contract awards are viewed alongside participation data, a clearer picture emerges: the market is expanding not because of a few oversized deals, but because more buyers and more suppliers are active in the system. The growth, in other words, is structural rather than sporadic – driven by a broader and increasingly diverse procurement base.



Strategic implications for suppliers

In recent years, both the number and value of framework agreements have grown, reflecting a shift toward structured, multi year procurement. Access to public sector opportunities now often depends on securing a place on these frameworks, which grants eligibility for call off contracts. Those not on a framework may find many opportunities closed to them.

For contracting authorities, frameworks offer efficiency and continuity; for suppliers, early engagement is increasingly essential. Relying solely on published contract notices is no longer enough. Suppliers should monitor early signals—such as UK2 preliminary market engagement notices—to prepare, clarify scope, and engage with buyers before competitions begin.

Framework titles do not always clearly indicate included products or services, and relevant opportunities may appear under broader categories—for example, a “Total Surgical Instruments Solutions” framework might include sterilisation or decontamination lots. A thorough search strategy that looks beyond titles and tracks early notices is therefore critical to identifying suitable opportunities.

As procurement data becomes more accessible, the challenge for suppliers is no longer finding tenders, but interpreting market signals early enough to act on

them. Increasingly, procurement information is being used not only to respond to active opportunities but to understand purchasing patterns, identify repeat buyers and anticipate future demand.

What can suppliers do?

We have shown that the laboratory procurement landscape across the UK and Ireland is becoming increasingly dynamic and competitive. As transparency improves under the Procurement Act, the ability to analyse procurement data and identify structural shifts in demand is becoming essential for suppliers aiming to spot opportunities and plan strategically.

This activity can be time consuming, particularly for

smaller companies; however, GAMBICA's Tender Alert Service (TAS) streamlines the process by organising and interpreting publicly available procurement data, helping suppliers track evolving demand across sectors.

As part of their membership, all GAMBICA members receive tailored UK and EU tender alerts twice a week, free of charge. These alerts exclude irrelevant opportunities and can be supplemented with customised reports on competitor activity and laboratory construction projects, helping companies build stronger pipelines and identify new prospects.

The GAMBICA Tender Alert Service is only open to members, but if you would like to discuss joining the association call Tony on 07861 218819 or email lab@gambica.org.uk to start the conversation.



Tony Collins is the newly appointed Joint Head of Laboratory Technology at GAMBICA, the UK trade association for instrumentation, control, automation and laboratory technology. He previously served

as Managing Director of Priorclave, a laboratory autoclave manufacturer supplying research facilities in the UK and internationally.



Natalia Pan is a sales and procurement specialist with extensive experience in the laboratory and power sectors in Ukraine. Now based in the UK, she works as an independent consultant and leads the GAMBICA Tender Alert Service (TAS). She provides an expert review of publicly available tenders, ensuring that only relevant opportunities aligned with GAMBICA members' criteria are included. Her deep understanding of procurement processes and

broad industry expertise make her a valuable resource for organisations aiming to improve their success in public tenders across the UK and EU.

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