

# Global Micromanipulation Pipettes for IVF Supply, Demand and Key Producers, 2026-2032

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## Abstracts

The global Micromanipulation Pipettes for IVF market size is expected to reach \$ 57.16 million by 2032, rising at a market growth of 5.3% CAGR during the forecast period (2026-2032).

Micromanipulation Pipette for IVF is a specialized micromanipulation tool used in assisted reproductive laboratories for intracytoplasmic sperm injection. It is typically manufactured from fine glass capillary tubing with a sharp, beveled or spiked tip and is operated together with a micromanipulator and microinjection system. Its primary function is to aspirate and control a selected and immobilized single sperm under microscopic observation, penetrate the zona pellucida and oolemma of a stabilized oocyte, and release the sperm directly into the ooplasm to complete intracytoplasmic sperm injection. Product design focuses on tip configuration, lumen geometry, taper profile, bending angle, surface finish and manufacturing consistency to provide reliable sperm handling, controlled oocyte penetration and precise cytoplasmic injection while minimizing mechanical damage to the oocyte. ICSI micropipettes are specialized consumables for assisted reproductive micromanipulation and are functionally distinct from holding pipettes, which are used to stabilize the oocyte during the injection procedure.

## Key Findings

ICSI accounts for around 73% of fertilization treatments worldwide and remains the dominant assisted fertilization technique

Mainstream international channel prices are approximately US\$18–20 per

micropipette, commonly supplied in packs of ten

Spiked designs and inner diameters below 6 µm form the core configuration of mainstream clinical ICSI micropipettes

Fertility clinics and IVF centers constitute the primary downstream users, while hospital reproductive centers provide another major demand base

## Market Trends

The Micromanipulation Pipette for IVF market is evolving from basic glass injection tools toward highly standardized microtools optimized for reproducibility, lower oocyte trauma and embryologist-specific handling preferences. Major suppliers increasingly offer multiple combinations of spike design, lumen diameter, taper geometry, bend angle and tip-to-bend distance rather than a single universal specification. Long parallel-wall and slim designs are being developed to improve fluid control and reduce entry diameter, while rigid short-taper designs remain important for users seeking greater puncture stiffness. Large-bore models address surgically retrieved sperm, and flat-tip or dedicated Piezo injection pipettes are expanding the technical range of the market. Manufacturing is also becoming more controlled: CooperSurgical uses automated production and repeated dimensional inspection, while Kitazato and ASTEC emphasize individually inspected precision manufacturing and ICSION offers customized specifications. Cleanroom manufacture, individual sterile packaging, traceability, MEA and endotoxin testing are increasingly becoming core purchasing considerations rather than secondary features.

## Market Dynamics

### Drivers

Demand is fundamentally supported by the large and recurring global ART treatment base and the high penetration of ICSI within assisted fertilization. ESHRE reports more than three million registered ART cycles annually worldwide and estimates actual activity at around four million cycles after allowing for incomplete registry coverage; ICSI accounts for about 73% of fertilization treatments. Male-factor infertility remains the core clinical foundation for ICSI, while previous poor or failed fertilization and selected use after oocyte cryopreservation provide additional procedure demand. Because ICSI

requires direct sperm aspiration and oocyte injection through a precision microtool, each expansion in the number of ICSI-performing embryology laboratories generates recurring demand for sterile single-use injection micropipettes.

## Restraints

The market is constrained by the already-high penetration of ICSI, slowing ART growth in some mature markets and the relatively low value of each disposable micropipette. ESHRE notes that ART cycle growth in many developed countries has historically been in the mid- to high-single-digit range but is showing signs of moderation, while CooperSurgical also reported periods of softer fertility activity during 2025. In addition, broader use of ICSI is not automatically supported for every non-male-factor IVF cycle; the 2026 ASRM committee opinion continues to distinguish clearly indicated ICSI from routine use in patients with normal semen parameters. These factors limit the extent to which growth can be generated simply by increasing ICSI penetration, making treatment volume, geographic expansion and supplier share gains more important.

## Opportunities

The strongest opportunities lie in geographic expansion, localized manufacturing and increasingly differentiated microtool designs. Major suppliers are expanding distribution into North America, Europe and Asia, while Chinese manufacturers such as VitaVitro, DEWIN and Minvitro have established domestic ICSI injection or micromanipulation product lines, creating additional substitution opportunities in a market historically led by imported microtools. Product-level opportunities are emerging around lower-trauma slim designs, customized dimensions, large-bore pipettes for surgically retrieved sperm and Piezo-compatible injection pipettes. ICSION already supplies dedicated Piezo injection models and CooperSurgical offers flat-tip products for Piezo-ICSI, while DEWIN also includes Piezo tools within its micromanipulation portfolio. Customized production is particularly attractive because embryologists often maintain strong preferences for taper stiffness, fluid response, spike shape and bend geometry.

## Challenges

ICSI micropipettes are structurally simple but demanding to manufacture consistently because minute variations in inner diameter, bevel, spike formation, taper length, bend angle or surface defects can materially change handling characteristics during

microinjection. Suppliers must therefore combine precision glass processing with cleanroom control, dimensional inspection, sterilization and embryo-compatible biological testing. CooperSurgical performs full visual inspection throughout production and uses gamma sterilization together with MEA and LAL testing, while Labotect uses individually sterile packaging and validated electron-beam sterilization. Another challenge is that embryologist preference is highly operator-specific: flexible long-parallel tapers, rigid short tapers, spiked tips and non-spiked tips can all be preferred in different laboratories. This limits complete SKU standardization, increases high-mix manufacturing requirements and makes clinical familiarity, training, distributor support and reliable supply important competitive factors alongside price.

## Industry Chain Analysis

The upstream chain is centered on high-purity borosilicate glass capillary tubing, polymer holders and protective packaging, precision forming and inspection equipment, cleanroom infrastructure and sterilization services. Midstream production involves capillary cleaning, heating and pulling, taper formation, lumen control, beveling and spike fabrication, bending, polishing, dimensional inspection, cleaning, sterile packaging and biological quality control. CooperSurgical explicitly identifies cleaning, heating and sonication of borosilicate capillaries as part of its process, while VITROMED manufactures injection pipettes from specially cleaned borosilicate glass under cleanroom conditions. Finished products reach users through global direct-sales organizations and specialist IVF distributors, with independent fertility clinics, IVF centers and hospital reproductive medicine laboratories forming the principal clinical customer base and academic or research laboratories representing a smaller specialized segment. The value added is concentrated less in raw glass cost than in precision processing, process reproducibility, quality assurance, regulatory compliance and dependable global distribution.

## Segment Insights

By tip configuration, spiked ICSI micropipettes remain the mainstream architecture. CooperSurgical states that most of its ORIGIO ICSI micropipettes use fine spikes, while Vitrolife and Kitazato maintain extensive spiked product ranges; non-spiked products remain relevant for embryologists preferring a sharp bevel without an additional spike. By inner diameter, products below 5.0  $\mu\text{m}$  and those from 5.0 to below 6.0  $\mu\text{m}$  cover the core conventional ICSI range, reflecting the need to balance sperm aspiration, fluid

control and a small oocyte entry point. Products at 6.0 ?m and above form a more specialized segment, including designs intended to facilitate handling of surgically retrieved sperm or spermatids. By taper design, long parallel-wall products emphasize fine fluid control and flexibility, short parallel-wall products provide a different balance between control and stiffness, and rigid-taper designs serve embryologists who prefer greater tip rigidity during penetration. The continued coexistence of these designs indicates that operator preference and laboratory technique remain important determinants of product selection.

## **Downstream Market Opportunities**

Independent fertility clinics and IVF centers account for the principal commercial demand because ICSI is performed routinely in dedicated embryology laboratories equipped with inverted microscopes, micromanipulators and injection systems. Hospital-based reproductive medicine centers constitute another important customer segment, particularly in markets where ART services are concentrated in university hospitals, maternity hospitals or large medical systems. Academic and research laboratories represent a much smaller but technically important market for micromanipulation research, embryology training and method development. Future downstream opportunities are increasingly associated with large IVF clinic groups seeking standardized consumables across multiple laboratories, expansion of ART capacity in emerging markets, increasing treatment of complex male-factor infertility and greater demand for product traceability and consistent handling performance. Specialized clinical scenarios such as surgically retrieved sperm and Piezo-ICSI also support higher product differentiation even though they remain smaller than conventional ICSI.

## **Regional Insights**

Europe and North America remain major high-value markets for ICSI Micropipettes because of their mature ART infrastructure, extensive clinic networks and established use of regulated single-use laboratory consumables. Europe represents an exceptionally large documented ART base, while the United States combines substantial procedure volume with relatively high consumable pricing. Asia-Pacific provides the largest long-term volume opportunity through major ART markets including China and Japan, although near-term treatment growth can vary significantly by country. ESHRE identifies China at around one million ART cycles annually and Japan as one of the world's most active officially reported ART markets, while Kitazato

identifies the United States, Europe, China and other overseas markets as strategic areas for continued expansion. Regional competition is also becoming more localized: European and North American brands retain strong premium positions, while Chinese suppliers are broadening domestic ICSI microtool portfolios and international registrations.

## Competitive Landscape Analysis

The competitive landscape combines diversified global ART platforms with highly specialized micropipette manufacturers and increasingly capable regional suppliers. CooperSurgical has one of the strongest manufacturing positions, producing more than 1.5 million ORIGIO micropipettes annually across ICSI and other micromanipulation applications, while Vitrolife and Kitazato combine ICSI microtools with broader IVF consumable portfolios. Nexpring Health has emerged as an important consolidated ART platform incorporating Cook Reproductive Health, Hamilton Thorne, Gynemed, Gynetics, IVFtech, Planer and Irvine Scientific. Sunlight Medical, VITROMED, ASTEC, Labotect, Microtech IVF, Synga, ICSION Medical, ARSCI and Optimas compete through specialist microtool know-how, customization and embryologist-oriented designs. Chinese producers including VitaVitro, DEWIN, WEGO Shingene Medical, Lingen Precision Medical Products and Minvitro are strengthening domestic supply and widening the competitive field. Competition therefore centers on dimensional consistency, tip design, biological safety testing, clinical familiarity, specification breadth, distributor reach and reliable supply rather than on price alone.

## Report Scope

This report studies the global Micromanipulation Pipettes for IVF production, demand, key manufacturers, and key regions.

This report is a detailed and comprehensive analysis of the world market for Micromanipulation Pipettes for IVF and provides market size (US\$ million) and Year-over-Year (YoY) Growth, considering 2025 as the base year. This report explores demand trends and competition, as well as details the characteristics of Micromanipulation Pipettes for IVF that contribute to its increasing demand across many markets.

## Highlights and key features of the study

Global Micromanipulation Pipettes for IVF total production and demand, 2021-2032, (K Units)

Global Micromanipulation Pipettes for IVF total production value, 2021-2032, (USD Million)

Global Micromanipulation Pipettes for IVF production by region & country, production, value, CAGR, 2021-2032, (USD Million) & (K Units), (based on production site)

Global Micromanipulation Pipettes for IVF consumption by region & country, CAGR, 2021-2032 & (K Units)

U.S. VS China: Micromanipulation Pipettes for IVF domestic production, consumption, key domestic manufacturers and share

Global Micromanipulation Pipettes for IVF production by manufacturer, production, price, value and market share 2021-2026, (USD Million) & (K Units)

Global Micromanipulation Pipettes for IVF production by Type, production, value, CAGR, 2021-2032, (USD Million) & (K Units)

Global Micromanipulation Pipettes for IVF production by Application, production, value, CAGR, 2021-2032, (USD Million) & (K Units)

This report profiles key players in the global Micromanipulation Pipettes for IVF market based on the following parameters - company overview, production, value, price, gross margin, product portfolio, geographical presence, and key developments. Key companies covered as a part of this study include CooperSurgical, Nexpring Health, Vitrolife, Kitazato, Sunlight Medical, VITROMED, ASTEC, Labotect, Thomas Medical, Microtech IVF, etc.

This report also provides key insights about market drivers, restraints, opportunities, new product launches or approvals.

Stakeholders would have ease in decision-making through various strategy matrices used in analyzing the World Micromanipulation Pipettes for IVF market

## Detailed Segmentation:

Each section contains quantitative market data including market by value (US\$ Millions), volume (production, consumption) & (K Units) and average price (US\$/Unit) by manufacturer, by Type, and by Application. Data is given for the years 2021-2032 by year with 2025 as the base year, 2026 as the estimate year, and 2027-2032 as the forecast year.

## Global Micromanipulation Pipettes for IVF Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

## Market Segmentation

### Global Micromanipulation Pipettes for IVF Market, Segmentation by Type:

Spiked

Non-Spiked

## **Global Micromanipulation Pipettes for IVF Market, Segmentation by Inner Diameter:**

<5.0 ?m

5.0—<6.0 ?m

?6.0 ?m

## **Global Micromanipulation Pipettes for IVF Market, Segmentation by Taper Design:**

Long Parallel-Wall

Short Parallel-Wall

Rigid-Taper

## **Global Micromanipulation Pipettes for IVF Market, Segmentation by Application:**

Fertility Clinics and IVF Centers

Hospital-Based Reproductive Medicine Centers

Academic and Research Laboratories

Others

## **Companies Profiled:**

CooperSurgical

Nexpring Health

Vitrolife

Kitazato

Sunlight Medical

VITROMED

ASTEC

Labotect

Thomas Medical

Microtech IVF

Synga

ARSCI

Optimas

ICSION Medical

Monash Biotech

Reproline medical

TechBruein

SASOMed

VitaVitro

DEWIN

WEGO Shingene Medical

Lingen Precision Medical Products

Diagens Bio

Minvitro

## Key Questions Answered

1. How big is the global Micromanipulation Pipettes for IVF market?
2. What is the demand of the global Micromanipulation Pipettes for IVF market?
3. What is the year over year growth of the global Micromanipulation Pipettes for IVF market?
4. What is the total value of the global Micromanipulation Pipettes for IVF market?
5. Who are the Major Players in the global Micromanipulation Pipettes for IVF market?
6. What are the growth factors driving the market demand?

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