

Global Subcutaneous Drug Delivery Equipment Supply, Demand and Key Producers, 2026-2032

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Abstracts

The global Subcutaneous Drug Delivery Equipment market size is expected to reach \$ 60014 million by 2032, rising at a market growth of 8.0% CAGR during the forecast period (2026-2032).

Subcutaneous Drug Delivery Equipment refers to a class of drug delivery devices or systems that administer drugs into the subcutaneous tissue, with the core value of bypassing the skin's stratum corneum barrier to achieve efficient drug absorption. From an industry perspective, this field encompasses three major technological forms. The first is traditional needle-based devices such as auto-injectors and prefilled syringes. The second is on-body injectors, which are wearable devices that adhere to the skin and can be programmed to automatically complete subcutaneous delivery of large-volume or high-viscosity drugs. The third is implantable devices such as subcutaneous implants and implantable infusion ports. The subcutaneous tissue lies beneath the dermis and consists of loose connective tissue and adipose tissue, rich in capillaries and lymphatic vessels, allowing drugs to rapidly enter systemic circulation after injection while exhibiting low local proteolytic enzyme activity, making it particularly suitable for the delivery of large-molecule drugs. In recent years, with the explosive growth of biologics, subcutaneous drug delivery has transitioned from a complementary approach to intravenous infusion into the core infrastructure for biologic commercialization. This shift not only compresses the single administration time from tens of minutes for intravenous infusion to minutes, but also drives the migration of treatment settings from hospitals to homes, enabling patients or their caregivers to perform administration, thereby reshaping the competitive landscape of the global pharmaceutical industry.

Market Development Opportunities and Key Drivers

The mature application of recombinant human hyaluronidase has enabled single subcutaneous injection volume to surpass the traditional 1.5 mL limit, removing barriers for subcutaneous administration of biologics such as monoclonal antibodies and peptides. The rising global prevalence of chronic diseases is driving rigid demand for home-use drug delivery devices. In 2024, the U.S. Food and Drug Administration consecutively approved multiple subcutaneous tumor immunotherapy products, while China's National Medical Products Administration included subcutaneous drug delivery formulations in the expansion categories for generic drug consistency evaluation. Large pharmaceutical companies are treating subcutaneous drug delivery platforms as strategic assets to extend core product lifecycles through acquisitions and collaborations.

Market Challenges and Risks

As drug-device combination products, subcutaneous drug delivery equipment must satisfy dual regulatory review requirements for both pharmaceuticals and devices, and divergent interpretations of the primary mode of action across jurisdictions often lead to extended review cycles. The European Medical Device Regulation has elevated auto-injectors to Class III status while notified body certification capacity remains constrained. Wearable injectors carry high costs, making widespread adoption difficult in self-pay dominant markets, and U.S. payers commonly require prior authorization for biologics with high annual costs. Critical components remain concentrated among a limited number of suppliers, making supply chain geopolitical risks a concern.

Downstream Demand Trends

Large pharmaceutical companies are treating subcutaneous drug delivery platforms as strategic assets to counter biosimilar competition through acquisitions and licensing. In 2025, Enable Injections' enFuse system received regulatory approvals from both Brazil and the United Kingdom, signaling that wearable large-volume subcutaneous injection technology is gaining global regulatory acceptance. Chronic disease patients favor wearable injectors that can be worn for hours to automatically complete drug delivery, while oncology patients value the reduction of treatment time from half a day to minutes. The United Kingdom government has initiated a multi-billion pound program to promote hybrid closed-loop insulin systems, reflecting public payers' confidence in home-based subcutaneous drug delivery models.

Regional Trends

North America continues to dominate innovation and early commercialization, leveraging its dense biopharmaceutical clusters and mature drug-device combination review experience, with the U.S. Food and Drug Administration approving multiple subcutaneous tumor immunotherapy products in 2024. Europe emphasizes real-world evidence and health technology assessment, with Germany's Federal Joint Committee imposing stricter requirements for additional benefit assessment of novel drug-device combination products, positioning the region as a critical proving ground for clinical and economic value. China and the broader Asia-Pacific region are transitioning from generic following to integrated innovation, with large chronic disease patient populations and rapidly iterating manufacturing capabilities providing unique engineering advantages for local companies.

This report studies the global Subcutaneous Drug Delivery Equipment production, demand, key manufacturers, and key regions.

This report is a detailed and comprehensive analysis of the world market for Subcutaneous Drug Delivery Equipment 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 Subcutaneous Drug Delivery Equipment that contribute to its increasing demand across many markets.

Highlights and key features of the study

Global Subcutaneous Drug Delivery Equipment total production and demand, 2021-2032, (Units)

Global Subcutaneous Drug Delivery Equipment total production value, 2021-2032, (USD Million)

Global Subcutaneous Drug Delivery Equipment production by region & country, production, value, CAGR, 2021-2032, (USD Million) & (Units), (based on production site)

Global Subcutaneous Drug Delivery Equipment consumption by region & country, CAGR, 2021-2032 & (Units)

U.S. VS China: Subcutaneous Drug Delivery Equipment domestic production, consumption, key domestic manufacturers and share

Global Subcutaneous Drug Delivery Equipment production by manufacturer, production, price, value and market share 2021-2026, (USD Million) & (Units)

Global Subcutaneous Drug Delivery Equipment production by Type, production, value, CAGR, 2021-2032, (USD Million) & (Units)

Global Subcutaneous Drug Delivery Equipment production by Application, production, value, CAGR, 2021-2032, (USD Million) & (Units)

This report profiles key players in the global Subcutaneous Drug Delivery Equipment 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 Becton Dickinson, Ypsomed, SHL Medical, West Pharmaceutical Services, Gerresheimer, Owen Mumford, Novo Nordisk, Nemera, Tandem Diabetes Care, Enable Injections, 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 Subcutaneous Drug Delivery Equipment market

Detailed Segmentation:

Each section contains quantitative market data including market by value (US\$ Millions), volume (production, consumption) & (Units) and average price (USD/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 Subcutaneous Drug Delivery Equipment Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Global Subcutaneous Drug Delivery Equipment Market, Segmentation by Type:

Syringe

Injection Pen

Implantable Device

Global Subcutaneous Drug Delivery Equipment Market, Segmentation by Delivery Mechanism:

Manual Injection Device

Spring Driven Device

Motor Driven Device

Gas-Powered Device

Global Subcutaneous Drug Delivery Equipment Market, Segmentation by Drug Type:

Small Molecule Device

Peptide and Protein Device

Nucleic Acid Device

Global Subcutaneous Drug Delivery Equipment Market, Segmentation by Reusability:

Disposable Device

Reusable Device

Global Subcutaneous Drug Delivery Equipment Market, Segmentation by Application:

Disease Treatment

Vaccination

Aesthetics and Cosmetics

Companies Profiled:

Becton Dickinson

Ypsomed

SHL Medical

West Pharmaceutical Services

Gerresheimer

Owen Mumford

Novo Nordisk

Nemera

Tandem Diabetes Care

Enable Injections

Stevanato Group

MicroPort

Weigao Group

Key Questions Answered:

1. How big is the global Subcutaneous Drug Delivery Equipment market?
2. What is the demand of the global Subcutaneous Drug Delivery Equipment market?
3. What is the year over year growth of the global Subcutaneous Drug Delivery Equipment market?
4. What is the production and production value of the global Subcutaneous Drug Delivery Equipment market?
5. Who are the key producers in the global Subcutaneous Drug Delivery Equipment market?
6. What are the growth factors driving the market demand?

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