

Global Subretinal Cell Delivery Cannula Market 2026 by Manufacturers, Regions, Type and Application, Forecast to 2032

<https://marketpublishers.com/r/G2182D27FCEBEN.html>

Date: August 2026

Pages: 103

Price: US\$ 3,480.00 (Single User License)

ID: G2182D27FCEBEN

Abstracts

According to our (Global Info Research) latest study, the global Subretinal Cell Delivery Cannula market size was valued at US\$ 29.84 million in 2025 and is forecast to a readjusted size of US\$ 80.26 million by 2032 with a CAGR of 14.8% during review period.

Subretinal cell delivery cannulas are ultra-fine microinjection devices used in vitreoretinal microsurgery to place RPE cells, photoreceptor precursor cells, stem cell-derived cell suspensions, or related gene and biologic payloads into the subretinal space. They typically combine a 23G/25G/27G entry cannula, a 38G-41G or finer microtip, a Luer connector, extension tubing, and a manual or foot-controlled microinjection interface, with key requirements including sterile single-use supply, low dead volume, visible tip design, stable flow, low shear, and compatibility with vitrectomy platforms, with a composite gross margin of about 55%.

Demand is driven by the need for precise local delivery in inherited retinal diseases, age-related macular degeneration, retinal pigment epithelium degeneration, and submacular disorders. Cell therapy, ocular gene therapy, and complex vitreoretinal surgery all require stable and controllable subretinal bleb formation in a very small anatomical space, moving the cannula from a general surgical consumable to a critical device affecting dose consistency, cell viability, and procedural safety.

Product upgrades are focused on finer tips, lower dead volume, smoother micro-flow control, extendible structures, visible tip materials, and system compatibility with microinjection pumps or vitrectomy platforms. Companies such as DORC, MedOne, and Bausch + Lomb have established capabilities in disposable microtips, extendible

cannulas, and integrated microinjection solutions, while cell delivery use cases further support low-shear channels, anti-clogging design, and optimized pre-surgical loading workflows.

The market remains concentrated in advanced ophthalmic centers, gene therapy centers, and clinical research institutions in Europe and the United States, and commercialization depends on the clinical progress, regulatory access, and reimbursement capacity of ophthalmic cell therapies. Key risks include high surgical training requirements, limited eligible cases, and different payload viscosity and cell concentration requirements, while customized cannulas, closed-system handling, and robot or iOCT-guided delivery create new premium product opportunities.

This report is a detailed and comprehensive analysis for global Subretinal Cell Delivery Cannula market. Both quantitative and qualitative analyses are presented by manufacturers, by region & country, by Type and by Application. As the market is constantly changing, this report explores the competition, supply and demand trends, as well as key factors that contribute to its changing demands across many markets. Company profiles and product examples of selected competitors, along with market share estimates of some of the selected leaders for the year 2025, are provided.

Key Features:

Global Subretinal Cell Delivery Cannula market size and forecasts, in consumption value (\$ Million), sales quantity (Units), and average selling prices (US\$/Unit), 2021-2032

Global Subretinal Cell Delivery Cannula market size and forecasts by region and country, in consumption value (\$ Million), sales quantity (Units), and average selling prices (US\$/Unit), 2021-2032

Global Subretinal Cell Delivery Cannula market size and forecasts, by Type and by Application, in consumption value (\$ Million), sales quantity (Units), and average selling prices (US\$/Unit), 2021-2032

Global Subretinal Cell Delivery Cannula market shares of main players, shipments in revenue (\$ Million), sales quantity (Units), and ASP (US\$/Unit), 2021-2026

The Primary Objectives in This Report Are:

To determine the size of the total market opportunity of global and key countries

To assess the growth potential for Subretinal Cell Delivery Cannula

To forecast future growth in each product and end-use market

To assess competitive factors affecting the marketplace

This report profiles key players in the global Subretinal Cell Delivery Cannula market based on the following parameters - company overview, sales quantity, revenue, price, gross margin, product portfolio, geographical presence, and key developments. Key companies covered as a part of this study include MedOne Surgical, DORC, Bausch + Lomb, Katalyst Surgical, Accutome, Corza Eye, Orbit Biomedical, etc.

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

Market Segmentation

Subretinal Cell Delivery Cannula market is split by Type and by Application. For the period 2021-2032, the growth among segments provides accurate calculations and forecasts for consumption value by Type, and by Application in terms of volume and value. This analysis can help you expand your business by targeting qualified niche markets.

Market segment by Type

Fixed Microtip Cannula

Extendible Microtip Cannula

Dual-Bore Vented Cannula

Suprachoroidal Delivery System

Cell Sheet Delivery Cannula

Other Delivery Structures

Market segment by Entry Gauge

20G Entry Cannula

23G Entry Cannula

25G Entry Cannula

27G Entry Cannula

Other Entry Gauge

Market segment by Tip Material

Polyimide Tip

Metal Beveled Tip

PTFE Tip

Silicone Soft Tip

Other Tip Materials

Market segment by Delivery Mode

Manual Syringe Delivery

Foot-Controlled Microinjection

Vitreotomy Platform-Compatible Delivery

Suprachoroidal Access Delivery

Robotic or iOCT-Guided Delivery

Other Delivery Modes

Market segment by Application

Retinal Cell Therapy

Ocular Gene Therapy

Subretinal Drug Delivery

Submacular Hemorrhage and PFCL Management

Preclinical Retina Research

Other Applications

Major players covered

MedOne Surgical

DORC

Bausch + Lomb

Katalyst Surgical

Accutome

Corza Eye

Orbit Biomedical

Market segment by region, regional analysis covers

North America (United States, Canada, and Mexico)

Europe (Germany, France, United Kingdom, Russia, Italy, and Rest of Europe)

Asia-Pacific (China, Japan, Korea, India, Southeast Asia, and Australia)

South America (Brazil, Argentina, Colombia, and Rest of South America)

Middle East & Africa (Saudi Arabia, UAE, Egypt, South Africa, and Rest of Middle East & Africa)

The content of the study subjects, includes a total of 15 chapters:

Chapter 1, to describe Subretinal Cell Delivery Cannula product scope, market overview, market estimation caveats and base year.

Chapter 2, to profile the top manufacturers of Subretinal Cell Delivery Cannula, with price, sales quantity, revenue, and global market share of Subretinal Cell Delivery Cannula from 2021 to 2026.

Chapter 3, the Subretinal Cell Delivery Cannula competitive situation, sales quantity, revenue, and global market share of top manufacturers are analyzed emphatically by landscape contrast.

Chapter 4, the Subretinal Cell Delivery Cannula breakdown data are shown at the regional level, to show the sales quantity, consumption value, and growth by regions, from 2021 to 2032.

Chapter 5 and 6, to segment the sales by Type and by Application, with sales market share and growth rate by Type, by Application, from 2021 to 2032.

Chapter 7, 8, 9, 10 and 11, to break the sales data at the country level, with sales quantity, consumption value, and market share for key countries in the world, from 2021 to 2026. and Subretinal Cell Delivery Cannula market forecast, by regions, by Type, and by Application, with sales and revenue, from 2027 to 2032.

Chapter 12, market dynamics, drivers, restraints, trends, and Porters Five Forces analysis.

Chapter 13, the key raw materials and key suppliers, and industry chain of Subretinal Cell Delivery Cannula.

Chapter 14 and 15, to describe Subretinal Cell Delivery Cannula sales channel, distributors, customers, research findings and conclusion.

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