

Global Subretinal Cell Delivery Cannula Supply, Demand and Key Producers, 2026-2032

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Abstracts

The global Subretinal Cell Delivery Cannula market size is expected to reach \$ 80.26 million by 2032, rising at a market growth of 14.8% CAGR during the forecast period (2026-2032).

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 studies the global Subretinal Cell Delivery Cannula production, demand, key manufacturers, and key regions.

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

Highlights and key features of the study

Global Subretinal Cell Delivery Cannula total production and demand, 2021-2032, (Units)

Global Subretinal Cell Delivery Cannula total production value, 2021-2032, (USD Million)

Global Subretinal Cell Delivery Cannula production by region & country, production, value, CAGR, 2021-2032, (USD Million) & (Units), (based on production site)

Global Subretinal Cell Delivery Cannula consumption by region & country, CAGR, 2021-2032 & (Units)

U.S. VS China: Subretinal Cell Delivery Cannula domestic production, consumption, key domestic manufacturers and share

Global Subretinal Cell Delivery Cannula production by manufacturer, production, price, value and market share 2021-2026, (USD Million) & (Units)

Global Subretinal Cell Delivery Cannula production by Type, production, value, CAGR, 2021-2032, (USD Million) & (Units)

Global Subretinal Cell Delivery Cannula production by Application, production, value, CAGR, 2021-2032, (USD Million) & (Units)

This report profiles key players in the global Subretinal Cell Delivery Cannula 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 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.

Stakeholders would have ease in decision-making through various strategy matrices used in analyzing the World Subretinal Cell Delivery Cannula market

Detailed Segmentation:

Each section contains quantitative market data including market by value (US\$ Millions), volume (production, consumption) & (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 Subretinal Cell Delivery Cannula Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Global Subretinal Cell Delivery Cannula Market, Segmentation by Type:

Fixed Microtip Cannula

Extendible Microtip Cannula

Dual-Bore Vented Cannula

Suprachoroidal Delivery System

Cell Sheet Delivery Cannula

Other Delivery Structures

Global Subretinal Cell Delivery Cannula Market, Segmentation by Entry Gauge:

20G Entry Cannula

23G Entry Cannula

25G Entry Cannula

27G Entry Cannula

Other Entry Gauge

Global Subretinal Cell Delivery Cannula Market, Segmentation by Tip Material:

Polyimide Tip

Metal Beveled Tip

PTFE Tip

Silicone Soft Tip

Other Tip Materials

Global Subretinal Cell Delivery Cannula Market, Segmentation by Delivery Mode:

- Manual Syringe Delivery
- Foot-Controlled Microinjection
- Vitreotomy Platform-Compatible Delivery
- Suprachoroidal Access Delivery
- Robotic or iOCT-Guided Delivery
- Other Delivery Modes

Global Subretinal Cell Delivery Cannula Market, Segmentation by Application:

- Retinal Cell Therapy
- Ocular Gene Therapy
- Subretinal Drug Delivery
- Submacular Hemorrhage and PFCL Management
- Preclinical Retina Research
- Other Applications

Companies Profiled:

- MedOne Surgical
- DORC
- Bausch + Lomb
- Katalyst Surgical

Accutome

Corza Eye

Orbit Biomedical

Key Questions Answered:

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

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