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Global ICSI Injection and Holding Pipettes Market Growth 2026-2032

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Abstracts

The global ICSI Injection and Holding Pipettes market size is predicted to grow from US$ 135 million in 2025 to US$ 190 million in 2032; it is expected to grow at a CAGR of 5.1% from 2026 to 2032.

ICSI Injection and Holding Pipettes are a complementary pair of ultra-precision micromanipulation tools exclusively designed for Intracytoplasmic Sperm Injection (ICSI), a core assisted reproductive technology (ART) used to treat male infertility by enabling direct sperm delivery into an oocyte. The ICSI Holding Pipette—typically crafted from high-purity borosilicate glass or medical-grade plastic for biocompatibility and optical clarity—features a blunt, slightly rounded tip with a calibrated inner diameter and connects to a micromanipulator with adjustable negative pressure; its primary role is to gently but securely immobilize the oocyte during the procedure, stabilizing it without damaging the delicate zona pellucida, plasma membrane, or internal structures. In contrast, the ICSI Injection Pipette (made from the same biocompatible materials) has a sharp, needle-like tip with a much smaller inner diamete and a 30°–40° beveled or spiked geometry, engineered for precise penetration of the oocyte's protective layers; it aspirates a single sperm (even those with low motility or abnormal morphology) before piercing the zona pellucida and oolemma, then delivers the sperm directly into the oocyte's cytoplasm. Both pipettes undergo rigorous quality control—including gamma irradiation sterilization, endotoxin testing, and adherence to ISO 13485 medical device standards—and rely on optical transparency for real-time visualization under high-magnification microscopy (e.g., differential interference contrast, DIC).

In 2024, global ICSI Injection and Holding Pipettes production reached approximately 10,917 K units, with an average global market price of around US$ 12 per unit. The single-line production capacity of ICSI Injection and Holding Pipettes is 482 K units per

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year, the average gross profit margin was 34% .

The supply chain for ICSI Injection and Holding Pipettes is structured around upstream suppliers providing high-purity borosilicate glass, medical-grade plastics (e.g., polypropylene), biocompatible coatings, and specialized manufacturing equipment (e.g., pipette pullers, electron-beam machining tools), which are processed by midstream manufacturers through precision glass pulling, tip shaping (e.g., heat-polishing, laser-cutting), sterilization (gamma irradiation), and rigorous quality control (endotoxin testing, ISO 13485 compliance) to produce pipettes with calibrated tip geometries (e.g., 4.5–7 ?m inner diameter for injection pipettes); these are then distributed downstream via specialized logistics (cold-chain storage, sterile packaging) to fertility clinics, research institutions, and biotech firms, supported by post-sales services like technical calibration and disposal guidelines, with feedback loops optimizing upstream material sourcing (e.g., eco-friendly coatings) and midstream process efficiency (e.g., automated tip profiling) to meet evolving clinical demands for high-precision, biocompatible tools in assisted reproductive technologies.

Report Scope

LP Information, Inc. (LPI) ' newest research report, the “ICSI Injection and Holding Pipettes Industry Forecast” looks at past sales and reviews total world ICSI Injection and Holding Pipettes sales in 2025, providing a comprehensive analysis by region and market sector of projected ICSI Injection and Holding Pipettes sales for 2026 through 2032. With ICSI Injection and Holding Pipettes sales broken down by region, market sector and sub-sector, this report provides a detailed analysis in US$ millions of the world ICSI Injection and Holding Pipettes industry.

This Insight Report provides a comprehensive analysis of the global ICSI Injection and Holding Pipettes landscape and highlights key trends related to product segmentation, company formation, revenue, and market share, latest development, and M&A activity. This report also analyzes the strategies of leading global companies with a focus on ICSI Injection and Holding Pipettes portfolios and capabilities, market entry strategies, market positions, and geographic footprints, to better understand these firms’ unique position in an accelerating global ICSI Injection and Holding Pipettes market.

This Insight Report evaluates the key market trends, drivers, and affecting factors shaping the global outlook for ICSI Injection and Holding Pipettes and breaks down the forecast by Type, by Application, geography, and market size to highlight emerging pockets of opportunity. With a transparent methodology based on hundreds of bottom-

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up qualitative and quantitative market inputs, this study forecast offers a highly nuanced view of the current state and future trajectory in the global ICSI Injection and Holding Pipettes.

This report presents a comprehensive overview, market shares, and growth opportunities of ICSI Injection and Holding Pipettes market by product type, application, key manufacturers and key regions and countries.

Market Segmentation

Segmentation by Type:

ICSI Injection Pipettes

ICSI Holding Pipettes

Segmentation by Application:

Clinical ICSI

Research & Developmental Biology

Others

This report also splits the market by region:

Americas

United States

Canada

Mexico

Brazil

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APAC

China

Japan

Korea

Southeast Asia

India

Australia

Europe

Germany

France

UK

Italy

Russia

Middle East & Africa

Egypt

South Africa

Israel

Turkey

GCC Countries

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The below companies that are profiled have been selected based on inputs gathered from primary experts and analysing the company's coverage, product portfolio, its market penetration.

Vitrolife

Kitazato Corporation

Cook Medical

Sunlight Medical

VITROMED

Optimas

Astec

Monash Biotech

CooperSurgical, Inc.

Clunbury Scientific LLC

F&D

Microtech IVF

Shivani Scientific

Cryo Bio System

Synga

Key Questions Addressed in this Report

What is the 10-year outlook for the global ICSI Injection and Holding Pipettes

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market?

What factors are driving ICSI Injection and Holding Pipettes market growth, globally and by region?

Which technologies are poised for the fastest growth by market and region?

How do ICSI Injection and Holding Pipettes market opportunities vary by end market size?

How does ICSI Injection and Holding Pipettes break out by Type, by Application?

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