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Global ICSI Micropipette Market Growth 2026-2032

https://marketpublishers.com/r/G2B6AD09626FEN.html
Date: October 2026
Pages: 155
Price: US$ 3,660.00 (Single User License)
ID: G2B6AD09626FEN

Abstracts

The global ICSI Micropipette market size is predicted to grow from US$ 37.88 million in 2025 to US$ 55.37 million in 2032; it is expected to grow at a CAGR of 5.6% from 2026 to 2032.

ICSI Micropipette 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 ?m form the core configuration of mainstream clinical ICSI micropipettes

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

Market Trends

The ICSI Micropipette 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

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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.

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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 ?m and those from 5.0 to below 6.0 ?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

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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,

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Gyn?tics, 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

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

This Insight Report provides a comprehensive analysis of the global ICSI Micropipette 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 Micropipette portfolios and capabilities, market entry strategies, market positions, and geographic footprints, to better understand these firms’ unique position in an accelerating global ICSI Micropipette market.

This Insight Report evaluates the key market trends, drivers, and affecting factors shaping the global outlook for ICSI Micropipette 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-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 Micropipette.

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

Market Segmentation

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Segmentation by Type:

Spiked

Non-Spiked

Segmentation by Inner Diameter:

<5.0 ?m

5.0–<6.0 ?m

?6.0 ?m

Segmentation by Taper Design:

Long Parallel-Wall

Short Parallel-Wall

Rigid-Taper

Segmentation by Application:

Fertility Clinics and IVF Centers

Hospital-Based Reproductive Medicine Centers

Academic and Research Laboratories

Others

This report also splits the market by region:

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Americas

United States

Canada

Mexico

Brazil

APAC

China

Japan

Korea

Southeast Asia

India

Australia

Europe

Germany

France

UK

Italy

Russia

Middle East & Africa

Egypt

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South Africa

Israel

Turkey

GCC Countries

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.

CooperSurgical

Nexpring Health

Vitrolife

Kitazato

Sunlight Medical

VITROMED

ASTEC

Labotect

Thomas Medical

Microtech IVF

Synga

ARSCI

Optimas

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ICSION Medical

Monash Biotech

Reproline medical

TechBruein

SASOmed

VitaVitro

DEWIN

WEGO Shingene Medical

Lingen Precision Medical Products

Diagens Bio

Minvitro

Key Questions Addressed in this Report

What is the 10-year outlook for the global ICSI Micropipette market?

What factors are driving ICSI Micropipette market growth, globally and by region?

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

How do ICSI Micropipette market opportunities vary by end market size?

How does ICSI Micropipette break out by Type, by Application?

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Contents

1 SCOPE OF THE REPORT

1.1 Market Introduction
1.2 Years Considered
1.3 Research Objectives
1.4 Market Research Methodology
1.5 Research Process and Data Source
1.6 Economic Indicators
1.7 Currency Considered
1.8 Market Estimation Caveats

2 EXECUTIVE SUMMARY

2.1 World Market Overview
  2.1.1 Global ICSI Micropipette Annual Sales 2021-2032
  2.1.2 World Current & Future Analysis for ICSI Micropipette by Geographic Region, 2021, 2025 & 2032
  2.1.3 World Current & Future Analysis for ICSI Micropipette by Country/Region, 2021, 2025 & 2032
2.2 ICSI Micropipette Segment by Type
  2.2.1 Spiked
  2.2.2 Non-Spiked
  2.2.3 ICSI Micropipette Sales by Type
    2.2.3.1 Global ICSI Micropipette Sales Market Share by Type (2021-2026)
    2.2.3.2 Global ICSI Micropipette Revenue and Market Share by Type (2021-2026)
    2.2.3.3 Global ICSI Micropipette Sale Price by Type (2021-2026)
2.3 ICSI Micropipette Segment by Inner Diameter
  2.3.1 <5.0 ?m
  2.3.2 5.0–<6.0 ?m
  2.3.3 ?6.0 ?m
  2.3.4 ICSI Micropipette Sales by Inner Diameter
    2.3.4.1 Global ICSI Micropipette Sales Market Share by Inner Diameter (2021-2026)
    2.3.4.2 Global ICSI Micropipette Revenue and Market Share by Inner Diameter (2021-2026)
    2.3.4.3 Global ICSI Micropipette Sale Price by Inner Diameter (2021-2026)
2.4 ICSI Micropipette Segment by Taper Design
  2.4.1 Long Parallel-Wall

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2.4.2 Short Parallel-Wall
2.4.3 Rigid-Taper
2.4.4 ICSI Micropipette Sales by Taper Design
2.4.4.1 Global ICSI Micropipette Sales Market Share by Taper Design (2021-2026)
2.4.4.2 Global ICSI Micropipette Revenue and Market Share by Taper Design (2021-2026)
2.4.4.3 Global ICSI Micropipette Sale Price by Taper Design (2021-2026)
2.5 ICSI Micropipette Segment by Application
2.5.1 Fertility Clinics and IVF Centers
2.5.2 Hospital-Based Reproductive Medicine Centers
2.5.3 Academic and Research Laboratories
2.5.4 Others
2.5.5 ICSI Micropipette Sales by Application
2.5.5.1 Global ICSI Micropipette Sale Market Share by Application (2021-2026)
2.5.5.2 Global ICSI Micropipette Revenue and Market Share by Application (2021-2026)
2.5.5.3 Global ICSI Micropipette Sale Price by Application (2021-2026)

3 GLOBAL BY COMPANY

3.1 Global ICSI Micropipette Breakdown Data by Company
3.1.1 Global ICSI Micropipette Annual Sales by Company (2021-2026)
3.1.2 Global ICSI Micropipette Sales Market Share by Company (2021-2026)
3.2 Global ICSI Micropipette Annual Revenue by Company (2021-2026)
3.2.1 Global ICSI Micropipette Revenue by Company (2021-2026)
3.2.2 Global ICSI Micropipette Revenue Market Share by Company (2021-2026)
3.3 Global ICSI Micropipette Sale Price by Company
3.4 Key Manufacturers ICSI Micropipette Producing Area Distribution, Sales Area, Product Type
3.4.1 Key Manufacturers ICSI Micropipette Product Location Distribution
3.4.2 Players ICSI Micropipette Products Offered
3.5 Market Concentration Rate Analysis
3.5.1 Competition Landscape Analysis
3.5.2 Concentration Ratio (CR3, CR5 and CR10) & (2024-2026)
3.6 New Products and Potential Entrants
3.7 Market M&A Activity & Strategy

4 WORLD HISTORIC REVIEW FOR ICSI MICROPIPETTE BY GEOGRAPHIC REGION

+357 96 030922
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4.1 World Historic ICSI Micropipette Market Size by Geographic Region (2021-2026)
4.1.1 Global ICSI Micropipette Annual Sales by Geographic Region (2021-2026)
4.1.2 Global ICSI Micropipette Annual Revenue by Geographic Region (2021-2026)
4.2 World Historic ICSI Micropipette Market Size by Country/Region (2021-2026)
4.2.1 Global ICSI Micropipette Annual Sales by Country/Region (2021-2026)
4.2.2 Global ICSI Micropipette Annual Revenue by Country/Region (2021-2026)
4.3 Americas ICSI Micropipette Sales Growth
4.4 APAC ICSI Micropipette Sales Growth
4.5 Europe ICSI Micropipette Sales Growth
4.6 Middle East & Africa ICSI Micropipette Sales Growth

5 AMERICAS

5.1 Americas ICSI Micropipette Sales by Country
5.1.1 Americas ICSI Micropipette Sales by Country (2021-2026)
5.1.2 Americas ICSI Micropipette Revenue by Country (2021-2026)
5.2 Americas ICSI Micropipette Sales by Type (2021-2026)
5.3 Americas ICSI Micropipette Sales by Application (2021-2026)
5.4 United States
5.5 Canada
5.6 Mexico
5.7 Brazil

6 APAC

6.1 APAC ICSI Micropipette Sales by Region
6.1.1 APAC ICSI Micropipette Sales by Region (2021-2026)
6.1.2 APAC ICSI Micropipette Revenue by Region (2021-2026)
6.2 APAC ICSI Micropipette Sales by Type (2021-2026)
6.3 APAC ICSI Micropipette Sales by Application (2021-2026)
6.4 China
6.5 Japan
6.6 South Korea
6.7 Southeast Asia
6.8 India
6.9 Australia
6.10 China Taiwan

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info@marketpublishers.com

7 EUROPE

7.1 Europe ICSI Micropipette by Country
  7.1.1 Europe ICSI Micropipette Sales by Country (2021-2026)
  7.1.2 Europe ICSI Micropipette Revenue by Country (2021-2026)
7.2 Europe ICSI Micropipette Sales by Type (2021-2026)
7.3 Europe ICSI Micropipette Sales by Application (2021-2026)
7.4 Germany
7.5 France
7.6 UK
7.7 Italy
7.8 Russia

8 MIDDLE EAST & AFRICA

8.1 Middle East & Africa ICSI Micropipette by Country
  8.1.1 Middle East & Africa ICSI Micropipette Sales by Country (2021-2026)
  8.1.2 Middle East & Africa ICSI Micropipette Revenue by Country (2021-2026)
8.2 Middle East & Africa ICSI Micropipette Sales by Type (2021-2026)
8.3 Middle East & Africa ICSI Micropipette Sales by Application (2021-2026)
8.4 Egypt
8.5 South Africa
8.6 Israel
8.7 Turkey
8.8 GCC Countries

9 MARKET DRIVERS, CHALLENGES AND TRENDS

9.1 Market Drivers & Growth Opportunities
9.2 Market Challenges & Risks
9.3 Industry Trends

10 MANUFACTURING COST STRUCTURE ANALYSIS

10.1 Raw Material and Suppliers
10.2 Manufacturing Cost Structure Analysis of ICSI Micropipette
10.3 Manufacturing Process Analysis of ICSI Micropipette
10.4 Industry Chain Structure of ICSI Micropipette

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11 MARKETING, DISTRIBUTORS AND CUSTOMER

11.1 Sales Channel
  11.1.1 Direct Channels
  11.1.2 Indirect Channels
11.2 ICSI Micropipette Distributors
11.3 ICSI Micropipette Customer

12 WORLD FORECAST REVIEW FOR ICSI MICROPIPETTE BY GEOGRAPHIC REGION

12.1 Global ICSI Micropipette Market Size Forecast by Region
  12.1.1 Global ICSI Micropipette Forecast by Region (2027-2032)
  12.1.2 Global ICSI Micropipette Annual Revenue Forecast by Region (2027-2032)
12.2 Americas Forecast by Country (2027-2032)
12.3 APAC Forecast by Region (2027-2032)
12.4 Europe Forecast by Country (2027-2032)
12.5 Middle East & Africa Forecast by Country (2027-2032)
12.6 Global ICSI Micropipette Forecast by Type (2027-2032)
12.7 Global ICSI Micropipette Forecast by Application (2027-2032)

13 KEY PLAYERS ANALYSIS

13.1 CooperSurgical
  13.1.1 CooperSurgical Company Information
  13.1.2 CooperSurgical ICSI Micropipette Product Portfolios and Specifications
  13.1.3 CooperSurgical ICSI Micropipette Sales, Revenue, Price and Gross Margin (2021-2026)
  13.1.4 CooperSurgical Main Business Overview
  13.1.5 CooperSurgical Latest Developments
13.2 Nexpring Health
  13.2.1 Nexpring Health Company Information
  13.2.2 Nexpring Health ICSI Micropipette Product Portfolios and Specifications
  13.2.3 Nexpring Health ICSI Micropipette Sales, Revenue, Price and Gross Margin (2021-2026)
  13.2.4 Nexpring Health Main Business Overview
  13.2.5 Nexpring Health Latest Developments
13.3 Vitrolife
  13.3.1 Vitrolife Company Information

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13.3.2 Vitrolife ICSI Micropipette Product Portfolios and Specifications
13.3.3 Vitrolife ICSI Micropipette Sales, Revenue, Price and Gross Margin (2021-2026)
13.3.4 Vitrolife Main Business Overview
13.3.5 Vitrolife Latest Developments
13.4 Kitazato
13.4.1 Kitazato Company Information
13.4.2 Kitazato ICSI Micropipette Product Portfolios and Specifications
13.4.3 Kitazato ICSI Micropipette Sales, Revenue, Price and Gross Margin (2021-2026)
13.4.4 Kitazato Main Business Overview
13.4.5 Kitazato Latest Developments
13.5 Sunlight Medical
13.5.1 Sunlight Medical Company Information
13.5.2 Sunlight Medical ICSI Micropipette Product Portfolios and Specifications
13.5.3 Sunlight Medical ICSI Micropipette Sales, Revenue, Price and Gross Margin (2021-2026)
13.5.4 Sunlight Medical Main Business Overview
13.5.5 Sunlight Medical Latest Developments
13.6 VITROMED
13.6.1 VITROMED Company Information
13.6.2 VITROMED ICSI Micropipette Product Portfolios and Specifications
13.6.3 VITROMED ICSI Micropipette Sales, Revenue, Price and Gross Margin (2021-2026)
13.6.4 VITROMED Main Business Overview
13.6.5 VITROMED Latest Developments
13.7 ASTEC
13.7.1 ASTEC Company Information
13.7.2 ASTEC ICSI Micropipette Product Portfolios and Specifications
13.7.3 ASTEC ICSI Micropipette Sales, Revenue, Price and Gross Margin (2021-2026)
13.7.4 ASTEC Main Business Overview
13.7.5 ASTEC Latest Developments
13.8 Labotect
13.8.1 Labotect Company Information
13.8.2 Labotect ICSI Micropipette Product Portfolios and Specifications
13.8.3 Labotect ICSI Micropipette Sales, Revenue, Price and Gross Margin (2021-2026)
13.8.4 Labotect Main Business Overview

+357 96 030922
info@marketpublishers.com

13.8.5 Labotect Latest Developments
13.9 Thomas Medical
13.9.1 Thomas Medical Company Information
13.9.2 Thomas Medical ICSI Micropipette Product Portfolios and Specifications
13.9.3 Thomas Medical ICSI Micropipette Sales, Revenue, Price and Gross Margin (2021-2026)
13.9.4 Thomas Medical Main Business Overview
13.9.5 Thomas Medical Latest Developments
13.10 Microtech IVF
13.10.1 Microtech IVF Company Information
13.10.2 Microtech IVF ICSI Micropipette Product Portfolios and Specifications
13.10.3 Microtech IVF ICSI Micropipette Sales, Revenue, Price and Gross Margin (2021-2026)
13.10.4 Microtech IVF Main Business Overview
13.10.5 Microtech IVF Latest Developments
13.11 Synga
13.11.1 Synga Company Information
13.11.2 Synga ICSI Micropipette Product Portfolios and Specifications
13.11.3 Synga ICSI Micropipette Sales, Revenue, Price and Gross Margin (2021-2026)
13.11.4 Synga Main Business Overview
13.11.5 Synga Latest Developments
13.12 ARSCI
13.12.1 ARSCI Company Information
13.12.2 ARSCI ICSI Micropipette Product Portfolios and Specifications
13.12.3 ARSCI ICSI Micropipette Sales, Revenue, Price and Gross Margin (2021-2026)
13.12.4 ARSCI Main Business Overview
13.12.5 ARSCI Latest Developments
13.13 Optimas
13.13.1 Optimas Company Information
13.13.2 Optimas ICSI Micropipette Product Portfolios and Specifications
13.13.3 Optimas ICSI Micropipette Sales, Revenue, Price and Gross Margin (2021-2026)
13.13.4 Optimas Main Business Overview
13.13.5 Optimas Latest Developments
13.14 ICSION Medical
13.14.1 ICSION Medical Company Information
13.14.2 ICSION Medical ICSI Micropipette Product Portfolios and Specifications

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13.14.3 ICSION Medical ICSI Micropipette Sales, Revenue, Price and Gross Margin (2021-2026)
13.14.4 ICSION Medical Main Business Overview
13.14.5 ICSION Medical Latest Developments
13.15 Monash Biotech
13.15.1 Monash Biotech Company Information
13.15.2 Monash Biotech ICSI Micropipette Product Portfolios and Specifications
13.15.3 Monash Biotech ICSI Micropipette Sales, Revenue, Price and Gross Margin (2021-2026)
13.15.4 Monash Biotech Main Business Overview
13.15.5 Monash Biotech Latest Developments
13.16 Reproline medical
13.16.1 Reproline medical Company Information
13.16.2 Reproline medical ICSI Micropipette Product Portfolios and Specifications
13.16.3 Reproline medical ICSI Micropipette Sales, Revenue, Price and Gross Margin (2021-2026)
13.16.4 Reproline medical Main Business Overview
13.16.5 Reproline medical Latest Developments
13.17 TechBruein
13.17.1 TechBruein Company Information
13.17.2 TechBruein ICSI Micropipette Product Portfolios and Specifications
13.17.3 TechBruein ICSI Micropipette Sales, Revenue, Price and Gross Margin (2021-2026)
13.17.4 TechBruein Main Business Overview
13.17.5 TechBruein Latest Developments
13.18 SASOmed
13.18.1 SASOmed Company Information
13.18.2 SASOmed ICSI Micropipette Product Portfolios and Specifications
13.18.3 SASOmed ICSI Micropipette Sales, Revenue, Price and Gross Margin (2021-2026)
13.18.4 SASOmed Main Business Overview
13.18.5 SASOmed Latest Developments
13.19 VitaVitro
13.19.1 VitaVitro Company Information
13.19.2 VitaVitro ICSI Micropipette Product Portfolios and Specifications
13.19.3 VitaVitro ICSI Micropipette Sales, Revenue, Price and Gross Margin (2021-2026)
13.19.4 VitaVitro Main Business Overview
13.19.5 VitaVitro Latest Developments

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13.20 DEWIN
13.20.1 DEWIN Company Information
13.20.2 DEWIN ICSI Micropipette Product Portfolios and Specifications
13.20.3 DEWIN ICSI Micropipette Sales, Revenue, Price and Gross Margin (2021-2026)
13.20.4 DEWIN Main Business Overview
13.20.5 DEWIN Latest Developments
13.21 WEGO Shingene Medical
13.21.1 WEGO Shingene Medical Company Information
13.21.2 WEGO Shingene Medical ICSI Micropipette Product Portfolios and Specifications
13.21.3 WEGO Shingene Medical ICSI Micropipette Sales, Revenue, Price and Gross Margin (2021-2026)
13.21.4 WEGO Shingene Medical Main Business Overview
13.21.5 WEGO Shingene Medical Latest Developments
13.22 Lingen Precision Medical Products
13.22.1 Lingen Precision Medical Products Company Information
13.22.2 Lingen Precision Medical Products ICSI Micropipette Product Portfolios and Specifications
13.22.3 Lingen Precision Medical Products ICSI Micropipette Sales, Revenue, Price and Gross Margin (2021-2026)
13.22.4 Lingen Precision Medical Products Main Business Overview
13.22.5 Lingen Precision Medical Products Latest Developments
13.23 Diagens Bio
13.23.1 Diagens Bio Company Information
13.23.2 Diagens Bio ICSI Micropipette Product Portfolios and Specifications
13.23.3 Diagens Bio ICSI Micropipette Sales, Revenue, Price and Gross Margin (2021-2026)
13.23.4 Diagens Bio Main Business Overview
13.23.5 Diagens Bio Latest Developments
13.24 Minvitro
13.24.1 Minvitro Company Information
13.24.2 Minvitro ICSI Micropipette Product Portfolios and Specifications
13.24.3 Minvitro ICSI Micropipette Sales, Revenue, Price and Gross Margin (2021-2026)
13.24.4 Minvitro Main Business Overview
13.24.5 Minvitro Latest Developments

14 RESEARCH FINDINGS AND CONCLUSION

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List Of Tables

LIST OF TABLES

Table 1. ICSI Micropipette Annual Sales CAGR by Geographic Region (2021, 2025 & 2032) & ($ millions)
Table 2. ICSI Micropipette Annual Sales CAGR by Country/Region (2021, 2025 & 2032) & ($ millions)
Table 3. Major Players of Spiked
Table 4. Major Players of Non-Spiked
Table 5. Global ICSI Micropipette Sales by Type (2021-2026) & (K Units)
Table 6. Global ICSI Micropipette Sales Market Share by Type (2021-2026)
Table 7. Global ICSI Micropipette Revenue by Type (2021-2026) & ($ million)
Table 8. Global ICSI Micropipette Revenue Market Share by Type (2021-2026)
Table 9. Global ICSI Micropipette Sale Price by Type (2021-2026) & (US$/Unit)
Table 10. Major Players of <5.0 ?m
Table 11. Major Players of 5.0–<6.0 ?m
Table 12. Major Players of ?6.0 ?m
Table 13. Global ICSI Micropipette Sales by Inner Diameter (2021-2026) & (K Units)
Table 14. Global ICSI Micropipette Sales Market Share by Inner Diameter (2021-2026)
Table 15. Global ICSI Micropipette Revenue by Inner Diameter (2021-2026) & ($ million)
Table 16. Global ICSI Micropipette Revenue Market Share by Inner Diameter (2021-2026)
Table 17. Global ICSI Micropipette Sale Price by Inner Diameter (2021-2026) & (US$/Unit)
Table 18. Major Players of Long Parallel-Wall
Table 19. Major Players of Short Parallel-Wall
Table 20. Major Players of Rigid-Taper
Table 21. Global ICSI Micropipette Sales by Taper Design (2021-2026) & (K Units)
Table 22. Global ICSI Micropipette Sales Market Share by Taper Design (2021-2026)
Table 23. Global ICSI Micropipette Revenue by Taper Design (2021-2026) & ($ million)
Table 24. Global ICSI Micropipette Revenue Market Share by Taper Design (2021-2026)
Table 25. Global ICSI Micropipette Sale Price by Taper Design (2021-2026) & (US$/Unit)
Table 26. Global ICSI Micropipette Sale by Application (2021-2026) & (K Units)
Table 27. Global ICSI Micropipette Sale Market Share by Application (2021-2026)
Table 28. Global ICSI Micropipette Revenue by Application (2021-2026) & ($ million)

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Table 29. Global ICSI Micropipette Revenue Market Share by Application (2021-2026)
Table 30. Global ICSI Micropipette Sale Price by Application (2021-2026) & (US$/Unit)
Table 31. Global ICSI Micropipette Sales by Company (2021-2026) & (K Units)
Table 32. Global ICSI Micropipette Sales Market Share by Company (2021-2026)
Table 33. Global ICSI Micropipette Revenue by Company (2021-2026) & ($ millions)
Table 34. Global ICSI Micropipette Revenue Market Share by Company (2021-2026)
Table 35. Global ICSI Micropipette Sale Price by Company (2021-2026) & (US$/Unit)
Table 36. Key Manufacturers ICSI Micropipette Producing Area Distribution and Sales Area
Table 37. Players ICSI Micropipette Products Offered
Table 38. ICSI Micropipette Concentration Ratio (CR3, CR5 and CR10) & (2024-2026)
Table 39. New Products and Potential Entrants
Table 40. Market M&A Activity & Strategy
Table 41. Global ICSI Micropipette Sales by Geographic Region (2021-2026) & (K Units)
Table 42. Global ICSI Micropipette Sales Market Share Geographic Region (2021-2026)
Table 43. Global ICSI Micropipette Revenue by Geographic Region (2021-2026) & ($ millions)
Table 44. Global ICSI Micropipette Revenue Market Share by Geographic Region (2021-2026)
Table 45. Global ICSI Micropipette Sales by Country/Region (2021-2026) & (K Units)
Table 46. Global ICSI Micropipette Sales Market Share by Country/Region (2021-2026)
Table 47. Global ICSI Micropipette Revenue by Country/Region (2021-2026) & ($ millions)
Table 48. Global ICSI Micropipette Revenue Market Share by Country/Region (2021-2026)
Table 49. Americas ICSI Micropipette Sales by Country (2021-2026) & (K Units)
Table 50. Americas ICSI Micropipette Sales Market Share by Country (2021-2026)
Table 51. Americas ICSI Micropipette Revenue by Country (2021-2026) & ($ millions)
Table 52. Americas ICSI Micropipette Sales by Type (2021-2026) & (K Units)
Table 53. Americas ICSI Micropipette Sales by Application (2021-2026) & (K Units)
Table 54. APAC ICSI Micropipette Sales by Region (2021-2026) & (K Units)
Table 55. APAC ICSI Micropipette Sales Market Share by Region (2021-2026)
Table 56. APAC ICSI Micropipette Revenue by Region (2021-2026) & ($ millions)
Table 57. APAC ICSI Micropipette Sales by Type (2021-2026) & (K Units)
Table 58. APAC ICSI Micropipette Sales by Application (2021-2026) & (K Units)
Table 59. Europe ICSI Micropipette Sales by Country (2021-2026) & (K Units)
Table 60. Europe ICSI Micropipette Revenue by Country (2021-2026) & ($ millions)
Table 61. Europe ICSI Micropipette Sales by Type (2021-2026) & (K Units)

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Table 62. Europe ICSI Micropipette Sales by Application (2021-2026) & (K Units)
Table 63. Middle East & Africa ICSI Micropipette Sales by Country (2021-2026) & (K Units)
Table 64. Middle East & Africa ICSI Micropipette Revenue Market Share by Country (2021-2026)
Table 65. Middle East & Africa ICSI Micropipette Sales by Type (2021-2026) & (K Units)
Table 66. Middle East & Africa ICSI Micropipette Sales by Application (2021-2026) & (K Units)
Table 67. Key Market Drivers & Growth Opportunities of ICSI Micropipette
Table 68. Key Market Challenges & Risks of ICSI Micropipette
Table 69. Key Industry Trends of ICSI Micropipette
Table 70. ICSI Micropipette Raw Material
Table 71. Key Suppliers of Raw Materials
Table 72. ICSI Micropipette Distributors List
Table 73. ICSI Micropipette Customer List
Table 74. Global ICSI Micropipette Sales Forecast by Region (2027-2032) & (K Units)
Table 75. Global ICSI Micropipette Revenue Forecast by Region (2027-2032) & ($ millions)
Table 76. Americas ICSI Micropipette Sales Forecast by Country (2027-2032) & (K Units)
Table 77. Americas ICSI Micropipette Annual Revenue Forecast by Country (2027-2032) & ($ millions)
Table 78. APAC ICSI Micropipette Sales Forecast by Region (2027-2032) & (K Units)
Table 79. APAC ICSI Micropipette Annual Revenue Forecast by Region (2027-2032) & ($ millions)
Table 80. Europe ICSI Micropipette Sales Forecast by Country (2027-2032) & (K Units)
Table 81. Europe ICSI Micropipette Revenue Forecast by Country (2027-2032) & ($ millions)
Table 82. Middle East & Africa ICSI Micropipette Sales Forecast by Country (2027-2032) & (K Units)
Table 83. Middle East & Africa ICSI Micropipette Revenue Forecast by Country (2027-2032) & ($ millions)
Table 84. Global ICSI Micropipette Sales Forecast by Type (2027-2032) & (K Units)
Table 85. Global ICSI Micropipette Revenue Forecast by Type (2027-2032) & ($ millions)
Table 86. Global ICSI Micropipette Sales Forecast by Application (2027-2032) & (K Units)
Table 87. Global ICSI Micropipette Revenue Forecast by Application (2027-2032) & ($ millions)

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Table 88. CooperSurgical Basic Information, ICSI Micropipette Manufacturing Base, Sales Area and Its Competitors
Table 89. CooperSurgical ICSI Micropipette Product Portfolios and Specifications
Table 90. CooperSurgical ICSI Micropipette Sales (K Units), Revenue ($ Million), Price (US$/Unit) and Gross Margin (2021-2026)
Table 91. CooperSurgical Main Business
Table 92. CooperSurgical Latest Developments
Table 93. Nexpring Health Basic Information, ICSI Micropipette Manufacturing Base, Sales Area and Its Competitors
Table 94. Nexpring Health ICSI Micropipette Product Portfolios and Specifications
Table 95. Nexpring Health ICSI Micropipette Sales (K Units), Revenue ($ Million), Price (US$/Unit) and Gross Margin (2021-2026)
Table 96. Nexpring Health Main Business
Table 97. Nexpring Health Latest Developments
Table 98. Vitrolife Basic Information, ICSI Micropipette Manufacturing Base, Sales Area and Its Competitors
Table 99. Vitrolife ICSI Micropipette Product Portfolios and Specifications
Table 100. Vitrolife ICSI Micropipette Sales (K Units), Revenue ($ Million), Price (US$/Unit) and Gross Margin (2021-2026)
Table 101. Vitrolife Main Business
Table 102. Vitrolife Latest Developments
Table 103. Kitazato Basic Information, ICSI Micropipette Manufacturing Base, Sales Area and Its Competitors
Table 104. Kitazato ICSI Micropipette Product Portfolios and Specifications
Table 105. Kitazato ICSI Micropipette Sales (K Units), Revenue ($ Million), Price (US$/Unit) and Gross Margin (2021-2026)
Table 106. Kitazato Main Business
Table 107. Kitazato Latest Developments
Table 108. Sunlight Medical Basic Information, ICSI Micropipette Manufacturing Base, Sales Area and Its Competitors
Table 109. Sunlight Medical ICSI Micropipette Product Portfolios and Specifications
Table 110. Sunlight Medical ICSI Micropipette Sales (K Units), Revenue ($ Million), Price (US$/Unit) and Gross Margin (2021-2026)
Table 111. Sunlight Medical Main Business
Table 112. Sunlight Medical Latest Developments
Table 113. VITROMED Basic Information, ICSI Micropipette Manufacturing Base, Sales Area and Its Competitors
Table 114. VITROMED ICSI Micropipette Product Portfolios and Specifications
Table 115. VITROMED ICSI Micropipette Sales (K Units), Revenue ($ Million), Price

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(US$/Unit) and Gross Margin (2021-2026)
Table 116. VITROMED Main Business
Table 117. VITROMED Latest Developments
Table 118. ASTEC Basic Information, ICSI Micropipette Manufacturing Base, Sales Area and Its Competitors
Table 119. ASTEC ICSI Micropipette Product Portfolios and Specifications
Table 120. ASTEC ICSI Micropipette Sales (K Units), Revenue ($ Million), Price (US$/Unit) and Gross Margin (2021-2026)
Table 121. ASTEC Main Business
Table 122. ASTEC Latest Developments
Table 123. Labotect Basic Information, ICSI Micropipette Manufacturing Base, Sales Area and Its Competitors
Table 124. Labotect ICSI Micropipette Product Portfolios and Specifications
Table 125. Labotect ICSI Micropipette Sales (K Units), Revenue ($ Million), Price (US$/Unit) and Gross Margin (2021-2026)
Table 126. Labotect Main Business
Table 127. Labotect Latest Developments
Table 128. Thomas Medical Basic Information, ICSI Micropipette Manufacturing Base, Sales Area and Its Competitors
Table 129. Thomas Medical ICSI Micropipette Product Portfolios and Specifications
Table 130. Thomas Medical ICSI Micropipette Sales (K Units), Revenue ($ Million), Price (US$/Unit) and Gross Margin (2021-2026)
Table 131. Thomas Medical Main Business
Table 132. Thomas Medical Latest Developments
Table 133. Microtech IVF Basic Information, ICSI Micropipette Manufacturing Base, Sales Area and Its Competitors
Table 134. Microtech IVF ICSI Micropipette Product Portfolios and Specifications
Table 135. Microtech IVF ICSI Micropipette Sales (K Units), Revenue ($ Million), Price (US$/Unit) and Gross Margin (2021-2026)
Table 136. Microtech IVF Main Business
Table 137. Microtech IVF Latest Developments
Table 138. Synga Basic Information, ICSI Micropipette Manufacturing Base, Sales Area and Its Competitors
Table 139. Synga ICSI Micropipette Product Portfolios and Specifications
Table 140. Synga ICSI Micropipette Sales (K Units), Revenue ($ Million), Price (US$/Unit) and Gross Margin (2021-2026)
Table 141. Synga Main Business
Table 142. Synga Latest Developments
Table 143. ARSCI Basic Information, ICSI Micropipette Manufacturing Base, Sales Area

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and Its Competitors
Table 144. ARSCI ICSI Micropipette Product Portfolios and Specifications
Table 145. ARSCI ICSI Micropipette Sales (K Units), Revenue ($ Million), Price (US$/Unit) and Gross Margin (2021-2026)
Table 146. ARSCI Main Business
Table 147. ARSCI Latest Developments
Table 148. Optimas Basic Information, ICSI Micropipette Manufacturing Base, Sales Area and Its Competitors
Table 149. Optimas ICSI Micropipette Product Portfolios and Specifications
Table 150. Optimas ICSI Micropipette Sales (K Units), Revenue ($ Million), Price (US$/Unit) and Gross Margin (2021-2026)
Table 151. Optimas Main Business
Table 152. Optimas Latest Developments
Table 153. ICSION Medical Basic Information, ICSI Micropipette Manufacturing Base, Sales Area and Its Competitors
Table 154. ICSION Medical ICSI Micropipette Product Portfolios and Specifications
Table 155. ICSION Medical ICSI Micropipette Sales (K Units), Revenue ($ Million), Price (US$/Unit) and Gross Margin (2021-2026)
Table 156. ICSION Medical Main Business
Table 157. ICSION Medical Latest Developments
Table 158. Monash Biotech Basic Information, ICSI Micropipette Manufacturing Base, Sales Area and Its Competitors
Table 159. Monash Biotech ICSI Micropipette Product Portfolios and Specifications
Table 160. Monash Biotech ICSI Micropipette Sales (K Units), Revenue ($ Million), Price (US$/Unit) and Gross Margin (2021-2026)
Table 161. Monash Biotech Main Business
Table 162. Monash Biotech Latest Developments
Table 163. Reproline medical Basic Information, ICSI Micropipette Manufacturing Base, Sales Area and Its Competitors
Table 164. Reproline medical ICSI Micropipette Product Portfolios and Specifications
Table 165. Reproline medical ICSI Micropipette Sales (K Units), Revenue ($ Million), Price (US$/Unit) and Gross Margin (2021-2026)
Table 166. Reproline medical Main Business
Table 167. Reproline medical Latest Developments
Table 168. TechBruein Basic Information, ICSI Micropipette Manufacturing Base, Sales Area and Its Competitors
Table 169. TechBruein ICSI Micropipette Product Portfolios and Specifications
Table 170. TechBruein ICSI Micropipette Sales (K Units), Revenue ($ Million), Price (US$/Unit) and Gross Margin (2021-2026)

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Table 171. TechBruein Main Business
Table 172. TechBruein Latest Developments
Table 173. SASOmed Basic Information, ICSI Micropipette Manufacturing Base, Sales Area and Its Competitors
Table 174. SASOmed ICSI Micropipette Product Portfolios and Specifications
Table 175. SASOmed ICSI Micropipette Sales (K Units), Revenue ($ Million), Price (US$/Unit) and Gross Margin (2021-2026)
Table 176. SASOmed Main Business
Table 177. SASOmed Latest Developments
Table 178. VitaVitro Basic Information, ICSI Micropipette Manufacturing Base, Sales Area and Its Competitors
Table 179. VitaVitro ICSI Micropipette Product Portfolios and Specifications
Table 180. VitaVitro ICSI Micropipette Sales (K Units), Revenue ($ Million), Price (US$/Unit) and Gross Margin (2021-2026)
Table 181. VitaVitro Main Business
Table 182. VitaVitro Latest Developments
Table 183. DEWIN Basic Information, ICSI Micropipette Manufacturing Base, Sales Area and Its Competitors
Table 184. DEWIN ICSI Micropipette Product Portfolios and Specifications
Table 185. DEWIN ICSI Micropipette Sales (K Units), Revenue ($ Million), Price (US$/Unit) and Gross Margin (2021-2026)
Table 186. DEWIN Main Business
Table 187. DEWIN Latest Developments
Table 188. WEGO Shingene Medical Basic Information, ICSI Micropipette Manufacturing Base, Sales Area and Its Competitors
Table 189. WEGO Shingene Medical ICSI Micropipette Product Portfolios and Specifications
Table 190. WEGO Shingene Medical ICSI Micropipette Sales (K Units), Revenue ($ Million), Price (US$/Unit) and Gross Margin (2021-2026)
Table 191. WEGO Shingene Medical Main Business
Table 192. WEGO Shingene Medical Latest Developments
Table 193. Lingen Precision Medical Products Basic Information, ICSI Micropipette Manufacturing Base, Sales Area and Its Competitors
Table 194. Lingen Precision Medical Products ICSI Micropipette Product Portfolios and Specifications
Table 195. Lingen Precision Medical Products ICSI Micropipette Sales (K Units), Revenue ($ Million), Price (US$/Unit) and Gross Margin (2021-2026)
Table 196. Lingen Precision Medical Products Main Business
Table 197. Lingen Precision Medical Products Latest Developments

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Table 198. Diagens Bio Basic Information, ICSI Micropipette Manufacturing Base, Sales Area and Its Competitors
Table 199. Diagens Bio ICSI Micropipette Product Portfolios and Specifications
Table 200. Diagens Bio ICSI Micropipette Sales (K Units), Revenue ($ Million), Price (US$/Unit) and Gross Margin (2021-2026)
Table 201. Diagens Bio Main Business
Table 202. Diagens Bio Latest Developments
Table 203. Minvitro Basic Information, ICSI Micropipette Manufacturing Base, Sales Area and Its Competitors
Table 204. Minvitro ICSI Micropipette Product Portfolios and Specifications
Table 205. Minvitro ICSI Micropipette Sales (K Units), Revenue ($ Million), Price (US$/Unit) and Gross Margin (2021-2026)
Table 206. Minvitro Main Business
Table 207. Minvitro Latest Developments

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List Of Figures

LIST OF FIGURES

Figure 1. Picture of ICSI Micropipette
Figure 2. ICSI Micropipette Report Years Considered
Figure 3. Research Objectives
Figure 4. Research Methodology
Figure 5. Research Process and Data Source
Figure 6. Global ICSI Micropipette Sales Growth Rate 2021-2032 (K Units)
Figure 7. Global ICSI Micropipette Revenue Growth Rate 2021-2032 ($ millions)
Figure 8. ICSI Micropipette Sales by Geographic Region (2021, 2025 & 2032) & ($ millions)
Figure 9. ICSI Micropipette Sales Market Share by Country/Region (2025)
Figure 10. ICSI Micropipette Sales Market Share by Country/Region (2021, 2025 & 2032)
Figure 11. Product Picture of Spiked
Figure 12. Product Picture of Non-Spiked
Figure 13. Global ICSI Micropipette Sales Market Share by Type in 2026
Figure 14. Global ICSI Micropipette Revenue Market Share by Type (2021-2026)
Figure 15. Product Picture of <5.0 ?m
Figure 16. Product Picture of 5.0–<6.0 ?m
Figure 17. Product Picture of ?6.0 ?m
Figure 18. Global ICSI Micropipette Sales Market Share by Inner Diameter in 2026
Figure 19. Global ICSI Micropipette Revenue Market Share by Inner Diameter (2021-2026)
Figure 20. Product Picture of Long Parallel-Wall
Figure 21. Product Picture of Short Parallel-Wall
Figure 22. Product Picture of Rigid-Taper
Figure 23. Global ICSI Micropipette Sales Market Share by Taper Design in 2026
Figure 24. Global ICSI Micropipette Revenue Market Share by Taper Design (2021-2026)
Figure 25. ICSI Micropipette Consumed in Fertility Clinics and IVF Centers
Figure 26. Global ICSI Micropipette Market: Fertility Clinics and IVF Centers (2021-2026) & (K Units)
Figure 27. ICSI Micropipette Consumed in Hospital-Based Reproductive Medicine Centers
Figure 28. Global ICSI Micropipette Market: Hospital-Based Reproductive Medicine Centers (2021-2026) & (K Units)

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Figure 29. ICSI Micropipette Consumed in Academic and Research Laboratories
Figure 30. Global ICSI Micropipette Market: Academic and Research Laboratories (2021-2026) & (K Units)
Figure 31. ICSI Micropipette Consumed in Others
Figure 32. Global ICSI Micropipette Market: Others (2021-2026) & (K Units)
Figure 33. Global ICSI Micropipette Sale Market Share by Application (2025)
Figure 34. Global ICSI Micropipette Revenue Market Share by Application in 2025
Figure 35. ICSI Micropipette Sales by Company in 2025 (K Units)
Figure 36. Global ICSI Micropipette Sales Market Share by Company in 2025
Figure 37. ICSI Micropipette Revenue by Company in 2025 ($ millions)
Figure 38. Global ICSI Micropipette Revenue Market Share by Company in 2025
Figure 39. Global ICSI Micropipette Sales Market Share by Geographic Region (2021-2026)
Figure 40. Global ICSI Micropipette Revenue Market Share by Geographic Region in 2025
Figure 41. Americas ICSI Micropipette Sales 2021-2026 (K Units)
Figure 42. Americas ICSI Micropipette Revenue 2021-2026 ($ millions)
Figure 43. APAC ICSI Micropipette Sales 2021-2026 (K Units)
Figure 44. APAC ICSI Micropipette Revenue 2021-2026 ($ millions)
Figure 45. Europe ICSI Micropipette Sales 2021-2026 (K Units)
Figure 46. Europe ICSI Micropipette Revenue 2021-2026 ($ millions)
Figure 47. Middle East & Africa ICSI Micropipette Sales 2021-2026 (K Units)
Figure 48. Middle East & Africa ICSI Micropipette Revenue 2021-2026 ($ millions)
Figure 49. Americas ICSI Micropipette Sales Market Share by Country in 2025
Figure 50. Americas ICSI Micropipette Revenue Market Share by Country (2021-2026)
Figure 51. Americas ICSI Micropipette Sales Market Share by Type (2021-2026)
Figure 52. Americas ICSI Micropipette Sales Market Share by Application (2021-2026)
Figure 53. United States ICSI Micropipette Revenue Growth 2021-2026 ($ millions)
Figure 54. Canada ICSI Micropipette Revenue Growth 2021-2026 ($ millions)
Figure 55. Mexico ICSI Micropipette Revenue Growth 2021-2026 ($ millions)
Figure 56. Brazil ICSI Micropipette Revenue Growth 2021-2026 ($ millions)
Figure 57. APAC ICSI Micropipette Sales Market Share by Region in 2025
Figure 58. APAC ICSI Micropipette Revenue Market Share by Region (2021-2026)
Figure 59. APAC ICSI Micropipette Sales Market Share by Type (2021-2026)
Figure 60. APAC ICSI Micropipette Sales Market Share by Application (2021-2026)
Figure 61. China ICSI Micropipette Revenue Growth 2021-2026 ($ millions)
Figure 62. Japan ICSI Micropipette Revenue Growth 2021-2026 ($ millions)
Figure 63. South Korea ICSI Micropipette Revenue Growth 2021-2026 ($ millions)
Figure 64. Southeast Asia ICSI Micropipette Revenue Growth 2021-2026 ($ millions)

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Figure 65. India ICSI Micropipette Revenue Growth 2021-2026 ($ millions)
Figure 66. Australia ICSI Micropipette Revenue Growth 2021-2026 ($ millions)
Figure 67. China Taiwan ICSI Micropipette Revenue Growth 2021-2026 ($ millions)
Figure 68. Europe ICSI Micropipette Sales Market Share by Country in 2025
Figure 69. Europe ICSI Micropipette Revenue Market Share by Country (2021-2026)
Figure 70. Europe ICSI Micropipette Sales Market Share by Type (2021-2026)
Figure 71. Europe ICSI Micropipette Sales Market Share by Application (2021-2026)
Figure 72. Germany ICSI Micropipette Revenue Growth 2021-2026 ($ millions)
Figure 73. France ICSI Micropipette Revenue Growth 2021-2026 ($ millions)
Figure 74. UK ICSI Micropipette Revenue Growth 2021-2026 ($ millions)
Figure 75. Italy ICSI Micropipette Revenue Growth 2021-2026 ($ millions)
Figure 76. Russia ICSI Micropipette Revenue Growth 2021-2026 ($ millions)
Figure 77. Middle East & Africa ICSI Micropipette Sales Market Share by Country (2021-2026)
Figure 78. Middle East & Africa ICSI Micropipette Sales Market Share by Type (2021-2026)
Figure 79. Middle East & Africa ICSI Micropipette Sales Market Share by Application (2021-2026)
Figure 80. Egypt ICSI Micropipette Revenue Growth 2021-2026 ($ millions)
Figure 81. South Africa ICSI Micropipette Revenue Growth 2021-2026 ($ millions)
Figure 82. Israel ICSI Micropipette Revenue Growth 2021-2026 ($ millions)
Figure 83. Turkey ICSI Micropipette Revenue Growth 2021-2026 ($ millions)
Figure 84. GCC Countries ICSI Micropipette Revenue Growth 2021-2026 ($ millions)
Figure 85. Manufacturing Cost Structure Analysis of ICSI Micropipette in 2026
Figure 86. Manufacturing Process Analysis of ICSI Micropipette
Figure 87. Industry Chain Structure of ICSI Micropipette
Figure 88. Channels of Distribution
Figure 89. Global ICSI Micropipette Sales Market Forecast by Region (2027-2032)
Figure 90. Global ICSI Micropipette Revenue Market Share Forecast by Region (2027-2032)
Figure 91. Global ICSI Micropipette Sales Market Share Forecast by Type (2027-2032)
Figure 92. Global ICSI Micropipette Revenue Market Share Forecast by Type (2027-2032)
Figure 93. Global ICSI Micropipette Sales Market Share Forecast by Application (2027-2032)
Figure 94. Global ICSI Micropipette Revenue Market Share Forecast by Application (2027-2032)

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