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Global Subretinal Cell Delivery Cannula Market Growth 2026-2032

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Abstracts

The global Subretinal Cell Delivery Cannula market size is predicted to grow from US$ 28.37 million in 2025 to US$ 80.07 million in 2032; it is expected to grow at a CAGR of 15.8% from 2026 to 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

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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.

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

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

This Insight Report evaluates the key market trends, drivers, and affecting factors shaping the global outlook for Subretinal Cell Delivery Cannula 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 Subretinal Cell Delivery Cannula.

This report presents a comprehensive overview, market shares, and growth opportunities of Subretinal Cell Delivery Cannula market by product type, application, key manufacturers and key regions and countries.

Segmentation by Type:

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Fixed Microtip Cannula

Extendible Microtip Cannula

Dual-Bore Vented Cannula

Suprachoroidal Delivery System

Cell Sheet Delivery Cannula

Other Delivery Structures

Segmentation by Entry Gauge:

20G Entry Cannula

23G Entry Cannula

25G Entry Cannula

27G Entry Cannula

Other Entry Gauge

Segmentation by Tip Material:

Polyimide Tip

Metal Beveled Tip

PTFE Tip

Silicone Soft Tip

Other Tip Materials

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Segmentation by Delivery Mode:

Manual Syringe Delivery

Foot-Controlled Microinjection

Vitrectomy Platform-Compatible Delivery

Suprachoroidal Access Delivery

Robotic or iOCT-Guided Delivery

Other Delivery Modes

Segmentation by Application:

Retinal Cell Therapy

Ocular Gene Therapy

Subretinal Drug Delivery

Submacular Hemorrhage and PFCL Management

Preclinical Retina Research

Other Applications

This report also splits the market by region:

Americas

United States

Canada

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- Mexico
- Brazil

APAC

- China
- Japan
- Korea
- Southeast Asia
- India
- Australia

Europe

- Germany
- France
- UK
- Italy
- Russia

Middle East & Africa

- Egypt
- South Africa
- Israel
- Turkey

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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.

MedOne Surgical

DORC

Bausch + Lomb

Katalyst Surgical

Accutome

Corza Eye

Orbit Biomedical

Key Questions Addressed in this Report

What is the 10-year outlook for the global Subretinal Cell Delivery Cannula market?

What factors are driving Subretinal Cell Delivery Cannula market growth, globally and by region?

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

How do Subretinal Cell Delivery Cannula market opportunities vary by end market size?

How does Subretinal Cell Delivery Cannula break out by Type, by Application?

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