

# **Pen Needles Market Forecasts to 2032 – Global Analysis By Type (Standard Pen Needles, Safety Pen Needles, Short Pen Needles, Long Pen Needles, and Other Types), Needle Length, Distribution Channel, Application, End Users and By Geography**

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## **Abstracts**

According to Statistics MRC, the Global Pen Needles Market is accounted for \$2.48 billion in 2025 and is expected to reach \$4.54 billion by 2032 growing at a CAGR of 9.0% during the forecast period. Pen needles are small, hollow, and thin needles designed for use with insulin pens or other injectable devices to administer medications, such as insulin, in a precise and controlled manner. They come in various lengths and gauges to suit different patient needs, ensuring comfortable and effective injections. Pen needles are commonly used by individuals with diabetes to manage their condition by delivering insulin subcutaneously. They are also used in the administration of other injectable treatments, offering convenience and reducing the need for syringes.

According to data published by Ypsomed in November 2023, the demand for its pen injections, UnoPen and YpsoPen, increased significantly in the past years, and sales exceeded 100 million units of Uno (now part of MTD Medical Technology and Devices S.p.A.) Pen and 10 million units of YpsoPen.

Market Dynamics:

Driver:

Rising adoption of home healthcare

The growing elderly population, coupled with the rising prevalence of diabetes, has

amplified the demand for self-administration of insulin using pen needles. Advancements in needle design, such as thinner and shorter needles, have improved patient comfort and adherence to insulin therapy. Additionally, the shift from conventional syringes to insulin pens has enhanced dosing accuracy and ease of use, further supporting market growth. Government initiatives promoting home-based care and the expansion of telehealth services have also contributed to this trend.

#### Restraint:

##### Lack of training and awareness

Improper handling and administration techniques can lead to needlestick injuries, infections, and suboptimal glycemic control. In developing regions, limited access to diabetes education programs exacerbates this issue, leading to poor adherence to insulin therapy. Additionally, misconceptions about pain and discomfort associated with pen needles discourage some patients from adopting them. Healthcare systems in low-income areas often lack structured training programs for insulin delivery devices. Addressing these educational gaps is crucial to maximizing the potential of pen needles in diabetes management.

#### Opportunity:

##### Growing awareness of diabetes management

Public health campaigns and initiatives by organizations like the International Diabetes Federation (IDF) are raising awareness about modern insulin administration methods. Technological advancements, such as safety-engineered pen needles, are gaining traction due to their ability to reduce needlestick injuries and improve patient safety. The integration of digital health tools, including smart insulin pens, further enhances diabetes management by tracking doses and providing reminders. Emerging markets with rising diabetes prevalence offer untapped potential for market expansion.

#### Threat:

##### Risk of needlestick injuries

Improper disposal and handling of used needles can lead to accidental punctures, increasing the risk of bloodborne infections such as HIV and hepatitis. Regulatory bodies are enforcing stricter guidelines on needle safety, but compliance varies across

regions. The high cost of safety-engineered pen needles also limits their adoption in low-resource settings. Additionally, patient reluctance to use safety mechanisms due to perceived complexity further exacerbates the issue. Addressing these challenges requires continuous innovation in needle design and stronger enforcement of safety protocols.

#### Covid-19 Impact:

The COVID-19 pandemic had a mixed impact on the pen needles market, with disruptions in supply chains and reduced hospital visits initially slowing growth. However, the increased focus on home-based diabetes management during lockdowns boosted demand for insulin pens and pen needles. Patients preferred self-administration to avoid frequent hospital visits, reducing exposure risks. Post-pandemic, the emphasis on chronic disease management and preventive healthcare continues to drive market expansion. Manufacturers are now prioritizing resilient supply chains and digital health integration to meet evolving patient needs.

The safety pen needles segment is expected to be the largest during the forecast period

The safety pen needles segment is expected to account for the largest market share during the forecast period, driven by stringent regulatory guidelines promoting needlestick injury prevention in healthcare settings. Innovations such as retractable needles, automatic shielding mechanisms, and passive safety designs enhance user protection, particularly for healthcare workers and home caregivers. The growing preference for painless and ultra-thin needles further boosts adoption among diabetes patients. Additionally, increasing reimbursement policies for safety-engineered devices in developed regions support market expansion.

The hospitals segment is expected to have the highest CAGR during the forecast period

Over the forecast period, the hospitals segment is predicted to witness the highest growth rate attributed to the rising number of diabetes-related hospital admissions and the increasing use of insulin pens in clinical settings. The integration of electronic health records (EHRs) with smart insulin pens enhances medication adherence and monitoring. Furthermore, government initiatives to standardize diabetes care in hospitals and the growing trend of value-based healthcare contribute to segment growth.

#### Region with largest share:

During the forecast period, the Asia Pacific region is expected to hold the largest market share, driven by the high and growing prevalence of diabetes in countries like India and China. Increasing healthcare expenditure, government-led diabetes awareness programs, and improving access to insulin delivery devices support market growth. The expansion of telemedicine and home healthcare services in the region further boosts demand for pen needles. Additionally, local manufacturers are introducing cost-effective products, making them accessible to a larger patient population.

Region with highest CAGR:

Over the forecast period, the North America region is anticipated to exhibit the highest CAGR, owing to advanced healthcare infrastructure, high adoption of safety pen needles, and strong regulatory support for needlestick injury prevention. The U.S. dominates the regional market due to widespread health insurance coverage for diabetes management devices and increasing patient awareness. Technological advancements, such as connected insulin pens and AI-driven dose tracking, are gaining traction. Additionally, rising investments in diabetes research and digital health solutions contribute to market acceleration.

Key players in the market

Some of the key players in Pen Needles Market include Novo Nordisk, Shanghai United Injection Device Co., Ltd., Becton, Dickinson and Company (BD), Ypsomed AG, Terumo Corporation, Mylan N.V., Medtronic, Owen Mumford, Sun Pharma, Diabetes Care, Roche Holding AG, Eli Lilly and Company, Smiths Medical, Injecto Pharmaceuticals, and Antares Pharma.

Key Developments:

In March 2025, Novo Nordisk A/S and United Laboratories International Holdings Limited (TUL) announced that Novo Nordisk and TUL's wholly-owned subsidiary The United Bio-Technology (Hengqin) Co., Ltd., have entered into an exclusive license agreement for UBT251, a triple agonist of the receptors for GLP-1, GIP, and glucagon in early-stage clinical development for the treatment of obesity, type 2 diabetes, and other diseases.

In February 2025, Terumo Vietnam Medical Equipment (Terumo Vietnam) and Daiichi Sankyo Vietnam have signed a Memorandum of Understanding (MoU) to collaborate on

advancing cardiovascular expertise in Vietnam. The initiative aims to support healthcare professionals in updating their knowledge and skills in interventional cardiology.

#### Types Covered:

Standard Pen Needles

Safety Pen Needles

Short Pen Needles

Long Pen Needles

Other Types

#### Needle Lengths Covered:

Short Length

Medium Length

Long Length

#### Distribution Channels Covered:

Retail Pharmacies

Direct Sales

Online Sales

Medical Distributors

Other Distribution Channels

#### Applications Covered:

Diabetes Treatment

Growth Hormone Therapy

Infertility Treatment

Other Applications

End Users Covered:

Hospitals

Clinics

Home Care

Ambulatory Surgical Centers (ASCs)

Other End Users

Regions Covered:

North America

US

Canada

Mexico

Europe

Germany

UK

Italy

France

Spain

Rest of Europe

#### Asia Pacific

Japan

China

India

Australia

New Zealand

South Korea

Rest of Asia Pacific

#### South America

Argentina

Brazil

Chile

Rest of South America

#### Middle East & Africa

Saudi Arabia

UAE

Qatar

South Africa

Rest of Middle East & Africa

What our report offers:

- Market share assessments for the regional and country-level segments
- Strategic recommendations for the new entrants
- Covers Market data for the years 2024, 2025, 2026, 2028, and 2032
- Market Trends (Drivers, Constraints, Opportunities, Threats, Challenges, Investment Opportunities, and recommendations)
- Strategic recommendations in key business segments based on the market estimations
- Competitive landscaping mapping the key common trends
- Company profiling with detailed strategies, financials, and recent developments
- Supply chain trends mapping the latest technological advancements

Free Customization Offerings:

All the customers of this report will be entitled to receive one of the following free customization options:

#### Company Profiling

Comprehensive profiling of additional market players (up to 3)

SWOT Analysis of key players (up to 3)

#### Regional Segmentation

Market estimations, Forecasts and CAGR of any prominent country as per the client's interest (Note: Depends on feasibility check)

#### Competitive Benchmarking

Benchmarking of key players based on product portfolio, geographical presence, and

strategic alliances

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