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Global Obstetric Vacuum Cup Supply, Demand and Key Producers, 2026-2032

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Abstracts

The global Obstetric Vacuum Cup market size is expected to reach $ 82.62 million by 2032, rising at a market growth of 3.6% CAGR during the forecast period (2026-2032).

Obstetric Vacuum Cups are specialized obstetric medical devices used to apply controlled vacuum-assisted traction to the fetal head during assisted delivery. The cup is placed on the fetal scalp and connected either to an external vacuum source or to an integrated manual vacuum mechanism, enabling the clinician to assist fetal descent and extraction under controlled traction. The FDA classifies the broader fetal vacuum extractor category as a Class II device and describes the suction cup as the key patient-contacting component used to transmit traction to the fetal head. The market covered in this study focuses on the vacuum cup and cup-centered assemblies, including standalone reusable cups, disposable cups, cup assemblies, and integrated single-use vacuum delivery devices. Commercial products include soft, semi-rigid and rigid designs; bell-shaped, mushroom-shaped, Bird and Malmström-type configurations; and products manufactured from medical-grade silicone, thermoplastic elastomers, rigid polymers and stainless steel. Major use remains vacuum-assisted vaginal delivery, while selected specialized cups are also designed for fetal-head assistance during cesarean delivery. Current commercial portfolios demonstrate both single-use and reusable product architectures and cup diameters commonly concentrated around the 40–70 mm range.

Key Findings

In 2025, the global weighted average selling price of obstetric vacuum cups was approximately US$45–55 per unit.

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Asia is the largest regional market.

Vacuum-assisted vaginal delivery remains the largest application.

Silicone is the primary material for reusable soft cups, while integrated single-use products have higher unit values.

Product development is increasingly focused on cup compliance, traction control, and integrated vacuum-control functions.

Market Trends

The principal product trend is the coexistence of two increasingly differentiated models: reusable standalone cups designed around cost efficiency and long service life, and higher-value disposable or integrated systems designed around procedural convenience, sterility and standardized operation. Current commercial portfolios include reusable soft silicone cups, reusable rigid metal cups, sterile single-use thermoplastic cups and one-piece systems combining the cup with a manual vacuum pump. Soft and semi-rigid cup designs are gaining strategic importance because manufacturers increasingly compete on the balance between traction performance, cup placement, fetal-scalp contact and reduction of unnecessary tissue trauma. The market is therefore evolving through incremental improvements in ergonomics, materials, pressure management and integrated product design rather than through fundamental changes in the clinical principle of vacuum-assisted delivery.

Market Dynamics

Drivers

Demand is supported by the continuing clinical role of operative vaginal delivery when labor requires assisted progression but immediate cesarean delivery is not selected. In the United States, CDC data recorded 82,628 vacuum-assisted vaginal births in 2023, equivalent to 2.3% of total births, while Australia reported a substantially higher 6.6% vacuum-assisted birth rate in 2023. These differences demonstrate that clinical practice patterns rather than birth volume alone determine market demand. Additional demand drivers include the expansion of institutional maternity care, replacement of reusable

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cups, increasing preference for sterile single-use products in higher-income markets, and adoption of integrated devices that reduce setup requirements and improve procedural standardization.

Restraints

The most important structural restraint is the increasing use of cesarean delivery, which reduces the number of births potentially eligible for vacuum-assisted vaginal intervention. WHO reports that the worldwide cesarean rate increased from around 7% in 1990 to about 21% and is projected to continue rising, with particularly high rates expected in Eastern Asia, Latin America, Western Asia and Southern Europe. The market is also constrained by the need for trained operators, institutional protocols governing operative vaginal delivery, liability concerns, and the fact that reusable cups can serve multiple procedures and therefore generate substantially lower replacement volumes than single-use devices.

Opportunities

The strongest commercial opportunities lie in product-mix upgrading rather than rapid expansion in underlying birth volumes. Integrated disposable devices can capture higher value per procedure through sterile packaging, built-in vacuum generation, pressure control and simplified setup, while cost-sensitive healthcare systems continue to create demand for reusable medical-grade silicone cups. Specialized products for difficult fetal positions and selected cesarean-assisted fetal-head delivery procedures provide additional niche opportunities; current manufacturer portfolios already include dedicated posterior-position and cesarean-use designs. Asia offers the largest absolute demand pool in the report model and combines large obstetric volumes with expanding domestic manufacturing capability, creating room for locally produced single-use products to replace imported systems in selected markets.

Challenges

Patient-contacting performance, mechanical integrity and post-market surveillance remain central industry challenges. In 2026, an FDA Class II recall covered 49,175 disposable vacuum delivery devices after complaints involving potential breakage at the traction-force-gauge-to-handle joint, illustrating how a single mechanical weakness can create significant regulatory and supply-chain consequences in an established product

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category. Manufacturers must therefore maintain tight control over molding, bonding, traction components, pressure-control mechanisms, sterilization and packaging integrity. Clinical outcomes also depend heavily on cup selection, correct placement, applied traction and operator experience, meaning product engineering alone cannot eliminate procedure-related risk.

Industry Chain Analysis

The upstream supply chain consists primarily of medical-grade silicone and other elastomers, polycarbonate and other rigid medical polymers, stainless steel, medical tubing, valves, handles, traction components and, for integrated products, manual vacuum pumps and pressure-control components. Commercial portfolios confirm the use of medical-grade silicone, thermoplastic elastomer, polycarbonate and autoclavable stainless steel across different cup configurations. Midstream manufacturers perform product design, molding or machining, assembly, pressure and traction testing, sterilization, sterile packaging and regulatory quality management. Downstream channels are concentrated in hospitals, maternity centers and obstetric departments, with distributors and medical-device procurement systems playing an important role in international markets. Product configuration determines supply-chain complexity: standalone reusable cups have relatively simple material and manufacturing structures, whereas one-piece disposable systems incorporate additional pump, gauge, valve, handle and packaging components.

Value Chain Analysis

Value creation increases significantly as products move from standalone reusable cups toward integrated disposable delivery devices. The lower end of the value chain is represented by reusable silicone cups, where material processing, durability and sterilization compatibility are the primary value drivers; Chinese procurement benchmarks of RMB285.67 per reusable silicone cup illustrate this lower unit-value structure. Integrated single-use products capture substantially more value through device engineering, sterile packaging, manual vacuum generation, traction handles, pressure management and procedural convenience, with Chinese procurement benchmarks reaching RMB968–1,280 per unit or set for disposable products. Regulatory registration, clinical acceptance, quality assurance, hospital access and established distribution channels also contribute materially to final product value, particularly in developed healthcare markets.

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Segment Insights

The most robust segmentation dimensions are By Reusability, By Product Configuration, By Cup Shape, By Primary Cup Material, By Cup Diameter, By Cup Compliance and By Primary Delivery Application. Single-use and reusable products form two clearly differentiated commercial models. Standalone cups remain important in reusable systems, while cup assemblies and integrated one-piece vacuum devices occupy higher-value positions. Bell-shaped and mushroom-shaped cups represent major modern geometries, while Bird and Malmström-type cups remain established traditional designs. Silicone dominates reusable soft-cup offerings, with thermoplastic elastomers and rigid polymers increasingly used in disposable products and stainless steel retained in reusable rigid cups. Commercial diameters are concentrated mainly between 40 mm and 70 mm. Vacuum-assisted vaginal delivery accounts for the principal application base, while cesarean-assisted fetal-head delivery remains a specialist niche.

Downstream Market Opportunities

Hospitals and maternity departments remain the primary downstream demand base. In mature healthcare systems, opportunities are concentrated in replacement purchasing, conversion from reusable to sterile single-use products, and premium integrated devices that simplify preparation and pressure control. Australia illustrates the potential of markets with comparatively high operative vaginal delivery utilization: vacuum assistance accounted for 6.6% of births in 2023 and reached 11% among women who had not previously given birth. In emerging markets, the opportunity structure is more diversified: reusable silicone cups remain attractive where procurement budgets and sterilization infrastructure favor multi-use devices, while locally manufactured disposable products can expand as hospital infection-control practices and standardized maternity-care protocols improve.

Regional Insights

Asia represents the largest regional revenue opportunity in the report model, with manufacturer-level market value estimated at approximately US$31.34 million in 2025, supported by its very large birth base and a supply structure spanning imported premium systems, Chinese single-use products, Japanese specialty silicone cups,

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Taiwanese medical-silicone manufacturing and a fragmented Indian reusable-cup manufacturing base. Europe is estimated at approximately US$14.53 million and retains relatively strong demand for reusable and specialized vacuum-assisted delivery systems. North America is estimated at approximately US$7.22 million and is characterized by a higher-value product mix and stronger penetration of integrated single-use systems. Clinical utilization varies substantially even among developed markets: U.S. vacuum-assisted deliveries represented 2.3% of births in 2023, compared with 6.6% in Australia, confirming that regional procedure patterns and product mix are as important as birth volume in determining market value.

Competitive Landscape Analysis

The competitive landscape is specialized rather than broadly diversified. North America is strongest in higher-value integrated and disposable vacuum delivery devices, supported by established regulatory registrations, hospital channels and clinically standardized product platforms. Europe retains strength in complete vacuum-assisted delivery systems, reusable cups and specialist cup configurations. China is developing a more visible domestic supply base in disposable fetal-head vacuum devices and represents an important localization market, while Japan and Taiwan maintain smaller specialist positions in reusable medical-grade silicone products. India has the broadest fragmented base of traditional silicone, Bird and Malmström-type cup manufacturers, but individual suppliers are generally smaller and more export-oriented. Competition is therefore increasingly split between globally distributed, higher-value integrated systems and regional manufacturers focused on cost-effective standalone or reusable cups, with regulatory quality, clinical acceptance, product reliability and distribution access remaining more important competitive barriers than raw-material technology alone.

Report Scope

This report studies the global Obstetric Vacuum Cup production, demand, key manufacturers, and key regions.

This report is a detailed and comprehensive analysis of the world market for Obstetric Vacuum Cup 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 Obstetric Vacuum Cup that contribute to its increasing demand across many markets.

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Highlights and key features of the study

Global Obstetric Vacuum Cup total production and demand, 2021-2032, (K Units)

Global Obstetric Vacuum Cup total production value, 2021-2032, (USD Million)

Global Obstetric Vacuum Cup production by region & country, production, value, CAGR, 2021-2032, (USD Million) & (K Units), (based on production site)

Global Obstetric Vacuum Cup consumption by region & country, CAGR, 2021-2032 & (K Units)

U.S. VS China: Obstetric Vacuum Cup domestic production, consumption, key domestic manufacturers and share

Global Obstetric Vacuum Cup production by manufacturer, production, price, value and market share 2021-2026, (USD Million) & (K Units)

Global Obstetric Vacuum Cup production by Type, production, value, CAGR, 2021-2032, (USD Million) & (K Units)

Global Obstetric Vacuum Cup production by Application, production, value, CAGR, 2021-2032, (USD Million) & (K Units)

This report profiles key players in the global Obstetric Vacuum Cup 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 LABORIE Medical Technologies Corp., The Cooper Companies, Inc., Medela AG, Utah Medical Products, Inc., SOFT MEDICAL CO., LTD., Beijing HangTian KaDi Technology R&D Institute, Jiangsu Ebay Medical Technology Co., Ltd., Kewei Medical Devices (Tianjin) Co., Ltd., FORTUNE MEDICAL INSTRUMENT CORP., GPC Medical Ltd., etc.

This report also provides key insights about market drivers, restraints, opportunities, new product launches or approvals.

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Stakeholders would have ease in decision-making through various strategy matrices used in analyzing the World Obstetric Vacuum Cup market

Detailed Segmentation:

Each section contains quantitative market data including market by value (US$ Millions), volume (production, consumption) & (K 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 Obstetric Vacuum Cup Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Market Segmentation

Global Obstetric Vacuum Cup Market, Segmentation by Type:

Single-use Vacuum Cups

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Reusable Vacuum Cups

Others

Global Obstetric Vacuum Cup Market, Segmentation by Cup Shape:

Bell-shaped Cups

Mushroom-shaped Cups

Bird and Malmström Type Cups

Others

Global Obstetric Vacuum Cup Market, Segmentation by Primary Cup Material:

Silicone

Other Elastomers

Rigid Thermoplastics

Metal

Others

Global Obstetric Vacuum Cup Market, Segmentation by Cup Diameter:

<50 mm

50–<60 mm

60–<70 mm

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?70 mm

Others

Global Obstetric Vacuum Cup Market, Segmentation by Application:

Vacuum-assisted Vaginal Delivery

Caesarean-assisted Fetal Head Delivery

Others

Companies Profiled:

LABORIE Medical Technologies Corp.

The Cooper Companies, Inc.

Medela AG

Utah Medical Products, Inc.

SOFT MEDICAL CO., LTD.

Beijing HangTian KaDi Technology R&D Institute

Jiangsu Ebay Medical Technology Co., Ltd.

Kewei Medical Devices (Tianjin) Co., Ltd.

FORTUNE MEDICAL INSTRUMENT CORP.

GPC Medical Ltd.

Deluxe Scientific Surgico Pvt. Ltd.

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IndoSurgicals Private Limited

Apothecaries Sundries Manufacturing Co.

Anand Medicaids Private Limited

Kay & Company

Ajanta Export Industries

Key Questions Answered

1. How big is the global Obstetric Vacuum Cup market?
2. What is the demand of the global Obstetric Vacuum Cup market?
3. What is the year over year growth of the global Obstetric Vacuum Cup market?
4. What is the total value of the global Obstetric Vacuum Cup market?
5. Who are the Major Players in the global Obstetric Vacuum Cup market?
6. What are the growth factors driving the market demand?

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