

Vaginal Slings Market – Global Industry Size, Share, Trends, Opportunity, & Forecast 2019-2029

Segmented By Product (Tension-Free Vaginal Tape Slings, Transobturator Slings, Mini-Slings), By Type (Midurethral Sling, Traditional Sling), By End-User (Hospitals, Clinics, Ambulatory Surgical Centers), By Region, Competition

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Abstracts

Global Vaginal Slings Market was valued at USD 1.78 billion in 2023 and is anticipated to project steady growth in the forecast period with a CAGR of 4.68% through 2029. The Global Vaginal Slings Market is a crucial segment of the broader healthcare industry, catering to women's health needs, specifically addressing stress urinary incontinence (SUI) and pelvic organ prolapse (POP). Vaginal slings are medical devices used to provide support to the urethra or other pelvic organs, restoring continence and improving patients' quality of life.

Due to hectic schedules, many individuals struggle to maintain a balanced diet, resulting in nutrient deficiencies. Consequently, there has been a significant rise in the consumption of Vaginal Slings to fulfill daily nutrient and vitamin requirements, promoting overall health and vitality. Furthermore, the increasing healthcare expenditure worldwide is anticipated to drive the demand for Vaginal Slings. Additionally, the growing elderly population in both developed and developing economies presents lucrative opportunities for market players in the forecast period. The senior population, in particular, relies on Vaginal Slings to meet their dietary needs, promote bone health, and support overall well-being.

Key Market Drivers

Increasing Prevalence of Stress Urinary Incontinence (SUI)

The increasing prevalence of Stress Urinary Incontinence (SUI) is a significant market driver for the growth of the global vaginal slings market. Stress urinary incontinence is a medical condition characterized by the involuntary leakage of urine during activities that raise intra-abdominal pressure, such as coughing, sneezing, laughing, or physical exertion. This condition primarily affects women and is often associated with factors like age, childbirth, obesity, and hormonal changes. SUI is a widespread medical issue, particularly among women. As per epidemiological studies, a significant percentage of women, especially those who have gone through childbirth or are in the later stages of life, experience symptoms of SUI. This data underscores the substantial target market for products like vaginal slings.

The global population is aging, and older women are more susceptible to SUI. As life expectancy increases in many regions, a larger portion of the population falls into the age group where SUI risk is higher. This demographic trend directly contributes to the growth of the SUI patient population. Modern lifestyle factors such as increased rates of obesity and sedentary living can exacerbate the prevalence of SUI. Obesity, in particular, is strongly correlated with SUI, as excess weight places added pressure on the pelvic floor muscles. The rise in obesity rates in many parts of the world has contributed to the increased incidence of SUI, further driving the need for treatment options.

Pregnancy and childbirth can weaken the pelvic floor muscles, leading to SUI. With a rising global population, the number of pregnancies and childbirths also increases, leading to a higher likelihood of SUI development. This connection between childbirth and SUI prevalence makes it a critical driver for the vaginal slings market. SUI significantly affects a woman's quality of life, often causing embarrassment, discomfort, and limitations on daily activities. As a result, many women seek medical treatment to address these issues. The desire for an improved quality of life propels the demand for effective solutions like vaginal slings.

Advancements in Surgical Techniques and Product Innovation

Advancements in surgical techniques and product innovation play a pivotal role in driving the growth of the global vaginal slings market. Vaginal slings are a medical solution used to treat stress urinary incontinence (SUI) in women, and improvements in the surgical approach and product design have significantly impacted the market.

Modern surgical techniques have shifted towards minimally invasive approaches, such as the use of vaginal slings. Traditional surgeries for SUI often required larger incisions and longer recovery times. Minimally invasive procedures involve smaller incisions, resulting in reduced post-operative pain, shorter hospital stays, and quicker recovery. These advancements have improved patient satisfaction and expanded the pool of potential candidates for SUI treatment. Product innovation in the form of synthetic and biologic slings has revolutionized the field. Synthetic slings, made from materials like polypropylene, are durable and provide long-term support to the urethra. Biologic slings, on the other hand, use natural tissue or animal-derived material to support the pelvic organs. This diversity in sling types allows surgeons to tailor treatment to the patient's specific needs and preferences, leading to better outcomes.

Recent innovations include adjustable slings that offer surgeons the ability to fine-tune the tension of the sling post-implantation. This adjustability ensures a more precise fit, reducing the risk of overcorrection or undercorrection. It also provides a more personalized approach to SUI treatment, enhancing the effectiveness of the procedure. Advances in product design have led to a decrease in complications associated with vaginal slings. Improved materials and manufacturing techniques have made slings more biocompatible, reducing the risk of adverse reactions or complications. This has bolstered patient confidence and contributed to the growth of the market.

Enhanced surgical techniques and innovative sling designs have resulted in shorter recovery periods. Patients can return to their regular activities sooner, reducing the disruption to their daily lives. This aspect has increased the overall appeal of vaginal sling procedures and encouraged more women to seek treatment. Product innovation has also led to improved success rates in treating SUI. Enhanced slings can provide better anatomical support, resulting in a higher likelihood of symptom resolution. The ability to fine-tune the sling's tension, as with adjustable slings, can further improve success rates and patient satisfaction.

Growing Awareness and Acceptance of Treatment Options

The growing awareness and acceptance of treatment options is a significant driver for the growth of the global vaginal slings market. Vaginal slings are medical devices used to treat stress urinary incontinence (SUI) in women. Increased awareness of this condition and the available treatment options, combined with greater acceptance of these options, have contributed to the expansion of the market. Numerous educational initiatives by healthcare organizations, advocacy groups, and pharmaceutical companies have been instrumental in raising awareness about SUI. These initiatives

provide information on SUI symptoms, risk factors, and available treatment options, including vaginal slings. This educational content empowers women to recognize their condition and seek help, driving the demand for treatment.

Public health campaigns, often in collaboration with celebrities or well-known figures, have drawn attention to the prevalence of SUI and the impact it can have on women's lives. These campaigns destigmatize the condition and encourage open conversations about seeking treatment, leading to higher awareness and acceptance of treatment options. Healthcare professionals play a crucial role in disseminating information about SUI and its treatment. Gynecologists, urologists, and primary care physicians routinely discuss SUI with their patients and recommend suitable treatments, including vaginal slings. This medical guidance encourages patients to consider treatment options and fosters greater acceptance.

Online and offline forums and support groups dedicated to women's health topics have provided platforms for women to share their SUI experiences and treatment journeys. These communities offer emotional support and information exchange, empowering women to seek treatment and share their successes, which, in turn, promote acceptance of vaginal slings. The reduction of stigma associated with SUI has been crucial in increasing awareness and acceptance. As conversations surrounding SUI become more normalized, women are more inclined to discuss their symptoms with healthcare providers and explore available treatment options, including vaginal slings.

Aging Population and Female Empowerment

The aging population and female empowerment are significant market drivers for the growth of the global vaginal slings market. Vaginal slings are medical devices used to treat stress urinary incontinence (SUI) in women, and these two factors play a critical role in shaping the market's dynamics. SUI is more common in older women due to factors like weakening pelvic muscles and hormonal changes. As the global population continues to age, there is a growing pool of women who are at a higher risk of developing SUI, creating a larger target market for vaginal slings.

Improvements in healthcare and living conditions have led to longer life expectancies in many regions. With aging populations, there is a higher likelihood of age-related health issues, including SUI, driving the demand for effective treatment options like vaginal slings. Older individuals tend to utilize healthcare services more frequently. This demographic's willingness to seek medical treatment for their health concerns contributes to the growth of the vaginal slings market as they become a prominent

patient group.

Female empowerment and increased autonomy in healthcare decision-making have encouraged women to seek treatment for conditions like SUI. Women today are more likely to advocate for their health and well-being, leading to a higher rate of diagnosis and treatment for SUI. Empowerment has played a role in reducing the stigma associated with SUI. Women are more open to discussing their health concerns, even those related to sensitive topics like incontinence. This openness fosters a more receptive environment for treatment, including vaginal slings. Empowered women are more inclined to prioritize their quality of life. SUI often has a profound impact on daily activities and self-esteem. Women are now more willing to seek treatment for SUI as it promises an improvement in their overall well-being and quality of life. As women have gained economic independence, they have more resources to invest in their healthcare. This financial independence allows them to consider elective treatments, including vaginal slings, as a means to enhance their quality of life.

Female empowerment has led to increased advocacy for women's health issues. Women's health organizations and advocates are working to raise awareness about SUI and its available treatments. This advocacy helps ensure that more women are informed about the condition and the options for addressing it. The demand for more effective and minimally invasive treatments, driven by empowered women, has prompted research and development efforts in the field. As a result, there is a continuous stream of innovative products and procedures, further expanding the market.

The empowerment of women has also led to improvements in healthcare access. Empowered women are more likely to actively engage with healthcare systems and seek appropriate treatments, driving the demand for SUI interventions like vaginal slings..

Key Market Challenges

Regulatory and Safety Concerns

One of the most critical challenges facing the vaginal slings market is concerns over product safety. Some vaginal sling products have been associated with adverse events, such as mesh erosion, infections, and other complications. These issues have led to regulatory scrutiny and even product recalls in some cases. Ensuring the safety and effectiveness of vaginal sling products is paramount to gain and maintain market trust.

Regulatory authorities, such as the U.S. FDA, have implemented stricter regulations and post-market surveillance requirements for pelvic mesh products, including vaginal slings. These regulations, aimed at enhancing patient safety, can slow down the market's growth by making it more challenging and time-consuming for manufacturers to bring new products to market. The legal landscape surrounding vaginal slings is complex, with various lawsuits filed by patients who claim to have suffered harm due to these devices. Legal proceedings can be protracted and costly, potentially impacting manufacturers' finances and reputation, and leading to hesitancy in product development.

Alternative Treatment Options

The availability of alternative non-surgical and non-mesh treatments for SUI poses a challenge to the vaginal slings market. These alternatives include physical therapy, lifestyle modifications, and non-invasive medical devices. Some women may prefer non-surgical options, especially if they are concerned about the risks associated with surgical procedures or vaginal slings.

Medications for managing SUI symptoms, such as anticholinergic drugs, are also in competition with vaginal slings. Some women may opt for pharmaceutical treatment due to its non-invasive nature and lower risk profile. The competition with medications may limit the market growth of vaginal slings.

Stigma and Awareness

Despite efforts to reduce stigma, SUI is still a condition associated with embarrassment and shame. This stigma can deter some women from seeking treatment or discussing their symptoms with healthcare providers. Overcoming this stigma and increasing awareness about the condition and available treatments is a significant challenge for the market.

While growing awareness is considered a driver, there is still a significant portion of the population that remains unaware of SUI and its treatment options, including vaginal slings. A lack of awareness among women and healthcare providers can lead to delayed or inadequate treatment. Inadequate patient and healthcare provider education can result in misunderstandings about the risks and benefits of vaginal sling procedures. Filling these educational gaps is essential to foster informed decision-making among women considering treatment.

Key Market Trends

Minimally Invasive Surgical Approaches

A notable trend in the vaginal slings market is the increasing adoption of minimally invasive surgical techniques. Laparoscopic and robotic-assisted procedures have gained prominence as they offer several advantages, including smaller incisions, reduced post-operative pain, shorter hospital stays, and quicker recovery times for patients. These less invasive approaches are appealing to both surgeons and patients, contributing to the growth of the vaginal slings market.

Transvaginal mesh procedures have also gained popularity as minimally invasive treatments for stress urinary incontinence. The use of synthetic or biologic mesh materials during these procedures provides long-lasting support to the urethra and pelvic organs. This trend in surgical techniques has expanded the range of treatment options available to patients, further fueling the market's growth.

Technological Advancements and Product Innovation

Ongoing research and development have led to the introduction of advanced sling materials that are more biocompatible, durable, and effective. These innovative materials offer improved anatomical support and reduce the risk of complications. Additionally, adjustable slings that allow for post-implantation tension adjustments have gained popularity, ensuring a more precise fit and enhancing treatment outcomes.

Biologic slings, made from natural or animal-derived tissues, have become a significant trend. These materials offer an alternative to synthetic slings and have found favor among some patients who prefer more natural options. Biologic slings may offer comparable efficacy with reduced risks, and their use continues to expand in the market. The trend toward personalized medicine has influenced the vaginal slings market. Surgeons are increasingly tailoring treatment to individual patient needs, selecting the most appropriate type of sling material and technique for each case. This approach not only enhances treatment outcomes but also contributes to market growth by addressing patient preferences.

Expanding Patient Demographics and Geographic Reach

The vaginal slings market is experiencing growth in different regions worldwide. As

healthcare infrastructure improves and awareness about SUI and its treatments increases, more women are seeking medical help for the condition. This expansion is notable in emerging markets and regions where healthcare access has historically been limited.

The global population is aging, with a significant proportion of older women who are at higher risk of developing stress urinary incontinence. As a result, there is a growing target demographic for the vaginal slings market. These older women, with a desire for an improved quality of life, are increasingly seeking SUI treatment options, which is driving market growth. The trend of patient awareness and empowerment continues to play a critical role in market growth. Women are becoming more proactive in discussing their health concerns with healthcare providers and seeking solutions for SUI. They are also advocating for their right to access the latest treatment options and technologies, further stimulating market demand.

Segmental Insights

Product Insights

Based on the category of Product, the transobturator slings segment emerged as the dominant player in the global market for Vaginal Slings in 2023. Transobturator slings have demonstrated their effectiveness in the treatment of SUI. These slings provide support to the urethra and bladder neck, helping to prevent urine leakage during activities that increase intra-abdominal pressure. The efficacy of transobturator slings in relieving SUI symptoms has made them a preferred choice among healthcare professionals and patients.

Transobturator sling procedures are minimally invasive, which is a significant advantage. During these procedures, small incisions are made in the groin area to insert the sling. This approach reduces post-operative pain, hospitalization duration, and recovery time when compared to traditional surgical techniques. Patients often prefer minimally invasive procedures, contributing to the popularity of transobturator slings.

Transobturator slings are associated with a lower risk of certain complications, such as mesh erosion and damage to nearby organs, when compared to other types of vaginal slings. This improved safety profile enhances patient and surgeon confidence in using transobturator slings for SUI treatment. Transobturator slings are available in a variety of materials, including synthetic and biologic options. This diversity allows healthcare providers to choose the most suitable sling material for each patient, taking into account

factors such as the patient's anatomy and individual preferences. This flexibility contributes to the widespread adoption of transobturator slings. These factors are expected to drive the growth of this segment.

Type Insight

Based on the category of Type, the Midurethral sling segment emerged as the dominant player in the global market for Vaginal Slings in 2023. Midurethral slings have been extensively researched and clinically tested, consistently demonstrating their effectiveness in treating SUI. They provide anatomical support to the midurethra, helping to prevent urine leakage during activities that increase intra-abdominal pressure. Their reliable efficacy has earned the trust of both healthcare professionals and patients.

Midurethral sling procedures are minimally invasive, which offers several advantages. During the procedure, healthcare providers make small incisions to insert the sling, resulting in reduced post-operative pain, shorter hospital stays, and quicker recovery times compared to more invasive surgical methods. Patients tend to prefer minimally invasive treatments, making midurethral slings a popular choice.

Midurethral slings are associated with a relatively low risk of complications compared to other types of vaginal slings. This includes a lower risk of complications such as mesh erosion or injury to adjacent structures. The improved safety profile of midurethral slings has boosted patient and surgeon confidence in using them for SUI treatment. Midurethral slings are available in a range of materials, including synthetic and biologic options. This diversity allows healthcare providers to select the most suitable sling material for each patient, considering factors such as individual anatomy and patient preferences. The flexibility in material choice contributes to the widespread adoption of midurethral slings. These factors are expected to drive the growth of this segment.

End-User Insights

Based on the category of End-User, the Hospital & Clinic slings segment emerged as the dominant player in the global market for Vaginal Slings in 2023. Hospitals and clinics typically have advanced medical equipment and facilities required for the diagnosis, preoperative evaluations, surgical procedures, and postoperative care related to vaginal slings. These facilities are essential for ensuring that the entire process, from diagnosis to recovery, is well-managed and efficient.

These healthcare settings often house a diverse range of medical specialists, including urologists, gynecologists, and pelvic health experts. The treatment of SUI often involves collaboration among these specialists, allowing for a comprehensive approach to patient care. Hospitals and clinics usually have experienced surgeons with expertise in the placement of vaginal slings. Surgeons specializing in female urology and pelvic floor disorders are often part of the team. Their specialized skills and experience are crucial for achieving successful surgical outcomes. In these settings, patients can receive thorough preoperative evaluations to determine the most suitable type of vaginal sling and surgical approach based on their specific needs and medical history. This personalized approach enhances patient outcomes. Hospitals and clinics are equipped to provide postoperative care and monitoring, ensuring that patients recover safely and effectively. This comprehensive approach to care reduces the risk of complications and enhances patient satisfaction. These factors collectively contribute to the growth of this segment.

Regional Insights

Europe emerged as the dominant player in the global Vaginal Slings market in 2023, holding the largest market share in terms of value. Europe has a significant aging population, and aging is a major risk factor for stress urinary incontinence (SUI). With more elderly individuals at risk of developing SUI, there is a higher demand for SUI treatments, including vaginal slings. This demographic shift has contributed to the market's growth. European countries boast robust healthcare infrastructures, with well-established hospitals, clinics, and medical facilities. This strong healthcare network allows for timely diagnosis and effective treatment of SUI, including the use of vaginal slings. European countries are home to several leading medical device manufacturers and research institutions specializing in pelvic health. This emphasis on research and development has led to the creation of innovative and effective vaginal sling products, cementing Europe's position as a hub for medical advancements in the field. Many European countries offer comprehensive healthcare coverage, including coverage for SUI treatments. This financial support encourages patients to seek medical assistance for their SUI symptoms and opt for treatments such as vaginal slings. European nations have made significant strides in raising awareness about SUI and its available treatments. Patients in Europe are more likely to seek medical advice and are well-informed about the condition. This increased awareness and acceptance have propelled the growth of the vaginal slings market.

The Asia-Pacific market is poised to be the fastest-growing market, offering lucrative growth opportunities for Vaginal Slings players during the forecast period. Factors such

as Asia Pacific are home to a large and rapidly growing population. With an increase in the number of women in the region, there is a higher prevalence of SUI cases. This demographic trend has resulted in an expanding patient pool seeking SUI treatment, including vaginal slings. The rising middle class in Asia Pacific has led to increased healthcare spending. As more individuals in the region gain access to healthcare services, they are more likely to seek treatment for SUI. This trend fuels the demand for vaginal slings. Emerging economies in Asia Pacific, such as India, China, and Southeast Asian countries, have witnessed significant improvements in healthcare infrastructure and accessibility. These countries have made strides in providing advanced medical treatments, including SUI management, contributing to market growth. Efforts to raise awareness about SUI and available treatments are gaining traction in Asia Pacific. As awareness grows, more women are recognizing the condition and seeking medical advice. The resulting demand for treatments like vaginal slings is propelling market growth. Asia Pacific has become a hub for medical tourism, attracting patients from around the world. The availability of high-quality medical facilities and competitive pricing for medical procedures, including vaginal sling surgeries, is contributing to the region's market growth.

Key Market Players

Boston Scientific Corporation

Coloplast Corp

Promedon S.A.

A.M.I. GmbH

Johnson & Johnson Services Inc.

Betatech Medical

Caldera Medical Inc

Neomedic International

Cousin Surgery SAS

Lotus Surgicals Pvt Ltd

Report Scope:

In this report, the Global Vaginal Slings Market has been segmented into the following categories, in addition to the industry trends which have also been detailed below:

Vaginal Slings Market, By Product:

Tension-Free Vaginal Tape Slings

Transobturator Slings

Mini-Slings

Vaginal Slings Market, By Type:

Midurethral Sling

Traditional Sling

Vaginal Slings Market, By End-User:

Hospitals & Clinics

Ambulatory Surgical Centers

Vaginal Slings Market, By Region:

North America

United States

Canada

Mexico

Europe

France

United Kingdom

Italy

Germany

Spain

Asia-Pacific

China

India

Japan

Australia

South Korea

South America

Brazil

Argentina

Colombia

Middle East & Africa

South Africa

Saudi Arabia

UAE

Competitive Landscape

Company Profiles: Detailed analysis of the major companies present in the Global Vaginal Slings Market.

Available Customizations:

Global Vaginal Slings market report with the given market data, Tech Sci Research offers customizations according to a company's specific needs. The following customization options are available for the report:

Company Information

Detailed analysis and profiling of additional market players (up to five).

Contents

- 1. Product Overview
 - 1.1. Market Definition
 - 1.2. Scope of the Market
 - 1.2.1. Markets Covered
 - 1.2.2. Years Considered for Study
 - 1.2.3. Key Market Segmentations

2. RESEARCH METHODOLOGY

- 2.1. Objective of the Study
- 2.2. Baseline Methodology
- 2.3. Key Industry Partners
- 2.4. Major Association and Secondary Sources
- 2.5. Forecasting Methodology
- 2.6. Data Triangulation & Validation
- 2.7. Assumptions and Limitations

3. EXECUTIVE SUMMARY

- 3.1. Overview of the Market
- 3.2. Overview of Key Market Segmentations
- 3.3. Overview of Key Market Players
- 3.4. Overview of Key Regions/Countries
- 3.5. Overview of Market Drivers, Challenges, Trends

4. VOICE OF CUSTOMER

5. GLOBAL VAGINAL SLINGS MARKET OUTLOOK

- 5.1. Market Size & Forecast
 - 5.1.1. By Value
- 5.2. Market Share & Forecast
 - 5.2.1. By Product (Tension-Free Vaginal Tape Slings, Transobturator Slings, Mini-Slings)
 - 5.2.2. By Type (Midurethral Sling, Traditional Sling)
 - 5.2.3. By End-User (Hospitals, Clinics, Ambulatory Surgical Centers)
 - 5.2.4. By Region

- 5.2.5. By Company (2023)
- 5.3. Market Map

6. NORTH AMERICA VAGINAL SLINGS MARKET OUTLOOK

- 6.1. Market Size & Forecast
 - 6.1.1. By Value
- 6.2. Market Share & Forecast
 - 6.2.1. By Product
 - 6.2.2. By Type
 - 6.2.3. By End-User
 - 6.2.4. By Country
- 6.3. North America: Country Analysis
 - 6.3.1. United States Vaginal Slings Market Outlook
 - 6.3.1.1. Market Size & Forecast
 - 6.3.1.1.1. By Value
 - 6.3.1.2. Market Share & Forecast
 - 6.3.1.2.1. By Product
 - 6.3.1.2.2. By Type
 - 6.3.1.2.3. By End-User
 - 6.3.2. Canada Vaginal Slings Market Outlook
 - 6.3.2.1. Market Size & Forecast
 - 6.3.2.1.1. By Value
 - 6.3.2.2. Market Share & Forecast
 - 6.3.2.2.1. By Product
 - 6.3.2.2.2. By Type
 - 6.3.2.2.3. By End-User
 - 6.3.3. Mexico Vaginal Slings Market Outlook
 - 6.3.3.1. Market Size & Forecast
 - 6.3.3.1.1. By Value
 - 6.3.3.2. Market Share & Forecast
 - 6.3.3.2.1. By Product
 - 6.3.3.2.2. By Type
 - 6.3.3.2.3. By End-User

7. EUROPE VAGINAL SLINGS MARKET OUTLOOK

- 7.1. Market Size & Forecast
 - 7.1.1. By Value

7.2. Market Share & Forecast

7.2.1. By Product

7.2.2. By Type

7.2.3. By End-User

7.2.4. By Country

7.3. Europe: Country Analysis

7.3.1. Germany Vaginal Slings Market Outlook

7.3.1.1. Market Size & Forecast

7.3.1.1.1. By Value

7.3.1.2. Market Share & Forecast

7.3.1.2.1. By Product

7.3.1.2.2. By Type

7.3.1.2.3. By End-User

7.3.2. United Kingdom Vaginal Slings Market Outlook

7.3.2.1. Market Size & Forecast

7.3.2.1.1. By Value

7.3.2.2. Market Share & Forecast

7.3.2.2.1. By Product

7.3.2.2.2. By Type

7.3.2.2.3. By End-User

7.3.3. Italy Vaginal Slings Market Outlook

7.3.3.1. Market Size & Forecast

7.3.3.1.1. By Value

7.3.3.2. Market Share & Forecast

7.3.3.2.1. By Product

7.3.3.2.2. By Type

7.3.3.2.3. By End-User

7.3.4. France Vaginal Slings Market Outlook

7.3.4.1. Market Size & Forecast

7.3.4.1.1. By Value

7.3.4.2. Market Share & Forecast

7.3.4.2.1. By Product

7.3.4.2.2. By Type

7.3.4.2.3. By End-User

7.3.5. Spain Vaginal Slings Market Outlook

7.3.5.1. Market Size & Forecast

7.3.5.1.1. By Value

7.3.5.2. Market Share & Forecast

7.3.5.2.1. By Product

7.3.5.2.2. By Type

7.3.5.2.3. By End-User

8. ASIA-PACIFIC VAGINAL SLINGS MARKET OUTLOOK

8.1. Market Size & Forecast

8.1.1. By Value

8.2. Market Share & Forecast

8.2.1. By Product

8.2.2. By Type

8.2.3. By End-User

8.2.4. By Country

8.3. Asia-Pacific: Country Analysis

8.3.1. China Vaginal Slings Market Outlook

8.3.1.1. Market Size & Forecast

8.3.1.1.1. By Value

8.3.1.2. Market Share & Forecast

8.3.1.2.1. By Product

8.3.1.2.2. By Type

8.3.1.2.3. By End-User

8.3.2. India Vaginal Slings Market Outlook

8.3.2.1. Market Size & Forecast

8.3.2.1.1. By Value

8.3.2.2. Market Share & Forecast

8.3.2.2.1. By Product

8.3.2.2.2. By Type

8.3.2.2.3. By End-User

8.3.3. Japan Vaginal Slings Market Outlook

8.3.3.1. Market Size & Forecast

8.3.3.1.1. By Value

8.3.3.2. Market Share & Forecast

8.3.3.2.1. By Product

8.3.3.2.2. By Type

8.3.3.2.3. By End-User

8.3.4. South Korea Vaginal Slings Market Outlook

8.3.4.1. Market Size & Forecast

8.3.4.1.1. By Value

8.3.4.2. Market Share & Forecast

8.3.4.2.1. By Product

- 8.3.4.2.2. By Type
- 8.3.4.2.3. By End-User
- 8.3.5. Australia Vaginal Slings Market Outlook
 - 8.3.5.1. Market Size & Forecast
 - 8.3.5.1.1. By Value
 - 8.3.5.2. Market Share & Forecast
 - 8.3.5.2.1. By Product
 - 8.3.5.2.2. By Type
 - 8.3.5.2.3. By End-User

9. SOUTH AMERICA VAGINAL SLINGS MARKET OUTLOOK

- 9.1. Market Size & Forecast
 - 9.1.1. By Value
- 9.2. Market Share & Forecast
 - 9.2.1. By Product
 - 9.2.2. By Type
 - 9.2.3. By End-User
 - 9.2.4. By Country
- 9.3. South America: Country Analysis
 - 9.3.1. Brazil Vaginal Slings Market Outlook
 - 9.3.1.1. Market Size & Forecast
 - 9.3.1.1.1. By Value
 - 9.3.1.2. Market Share & Forecast
 - 9.3.1.2.1. By Product
 - 9.3.1.2.2. By Type
 - 9.3.1.2.3. By End-User
 - 9.3.2. Argentina Vaginal Slings Market Outlook
 - 9.3.2.1. Market Size & Forecast
 - 9.3.2.1.1. By Value
 - 9.3.2.2. Market Share & Forecast
 - 9.3.2.2.1. By Product
 - 9.3.2.2.2. By Type
 - 9.3.2.2.3. By End-User
 - 9.3.3. Colombia Vaginal Slings Market Outlook
 - 9.3.3.1. Market Size & Forecast
 - 9.3.3.1.1. By Value
 - 9.3.3.2. Market Share & Forecast
 - 9.3.3.2.1. By Product

9.3.3.2.2. By Type

9.3.3.2.3. By End-User

10. MIDDLE EAST AND AFRICA VAGINAL SLINGS MARKET OUTLOOK

10.1. Market Size & Forecast

10.1.1. By Value

10.2. Market Share & Forecast

10.2.1. By Product

10.2.2. By Type

10.2.3. By End-User

10.2.4. By Country

10.3. MEA: Country Analysis

10.3.1. South Africa Vaginal Slings Market Outlook

10.3.1.1. Market Size & Forecast

10.3.1.1.1. By Value

10.3.1.2. Market Share & Forecast

10.3.1.2.1. By Product

10.3.1.2.2. By Type

10.3.1.2.3. By End-User

10.3.2. Saudi Arabia Vaginal Slings Market Outlook

10.3.2.1. Market Size & Forecast

10.3.2.1.1. By Value

10.3.2.2. Market Share & Forecast

10.3.2.2.1. By Product

10.3.2.2.2. By Type

10.3.2.2.3. By End-User

10.3.3. UAE Vaginal Slings Market Outlook

10.3.3.1. Market Size & Forecast

10.3.3.1.1. By Value

10.3.3.2. Market Share & Forecast

10.3.3.2.1. By Product

10.3.3.2.2. By Type

10.3.3.2.3. By End-User

11. MARKET DYNAMICS

11.1. Drivers

11.2. Challenges

12. MARKET TRENDS & DEVELOPMENTS

- 12.1. Recent Developments
- 12.2. Product Launches
- 12.3. Mergers & Acquisitions

13. GLOBAL VAGINAL SLINGS MARKET: SWOT ANALYSIS

14. COMPETITIVE LANDSCAPE

- 14.1. Boston Scientific Corporation
- 14.2. Coloplast Corp
- 14.3. Promedon S.A.
- 14.4. A.M.I. GmbH
- 14.5. Johnson & Johnson Services Inc.
- 14.6. Betatech Medical
- 14.7. Caldera Medical Inc
- 14.8. Neomedic International
- 14.9. Cousin Surgery SAS
- 14.10. Lotus Surgical Pvt Ltd

15. STRATEGIC RECOMMENDATIONS

16. ABOUT US & DISCLAIMER

Figures and Tables

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Product name: Vaginal Slings Market – Global Industry Size, Share, Trends, Opportunity, & Forecast 2019-2029 Segmented By Product (Tension-Free Vaginal Tape Slings, Transobturator Slings, Mini-Slings), By Type (Midurethral Sling, Traditional Sling), By End-User (Hospitals, Clinics, Ambulatory Surgical Centers), By Region, Competition

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