In-Vitro Fertilization (IVF) Market Analysis by Procedures, By Types of Cycles, By Instruments And Segment Forecasts to 2022

Description:

Global In-Vitro Fertilization (IVF) market is expected to reach USD 27 billion by 2022. The market is driven by the increasing incidence of infertility owing to, lifestyle changes, expansion of fertility procedures for treating male infertility such as ICSI, government initiatives to provide better reimbursement policies, and continuous efforts by the industry contributors.

Moreover, the availability of genomic testing enabling the prevention of the transfer of genetic disease during IVF use is further expected to drive the market demand. The increase in the number of IVF treatment has led more insurance players to cover the IVF procedures. This has ultimately led to competitive pricing and has moderated the treatment costs as IVF has been a successfully practiced technology. This will most likely drive the market by introducing treatment standardization and automation.

The behavioral shift in the society is a major factor contributing to the decreased Total Fertility Rate (TFR). These factors include an increasing number of women in the labor force, the increased age of the first birth, a shift from rural to urban societies, lower marriage rates, postponement of marriage, and greater levels of education for women.

Obesity is another factor, which has led to an increase in infertility in the population. This is due to the fact that the fat deposited on women's abdomen prevents follicular stimulation and produces male hormones. In the case of males, the rising fat decreases testosterone levels causing a problem in sperm production. Doctors have started recommending weight loss in men prior to fertility treatments along with proper Body Mass Index (BMI) maintenance. The U.S. Endocrine Society has established the use of Letrozole to increase the testosterone levels in obese patients.

Further key findings from the report suggest:

Intracytoplasmic Sperm Injection (ICSI) dominated the market in 2014. ICSI was introduced in the year 1992 and boosted the fertility rates from 50% to 80%, according to the American Society for Reproductive Medicine. In April 2016, Nigeria recorded its first successful delivery from a frozen egg. Bridge Clinic has stored the eggs using the flash-freezing technique. With this birth, Nigeria has put itself on the global map as it now offers IVF through frozen eggs. The eggs were then fertilized using the ICSI technique.

Frozen Embryo Replacement (FER) technique is expected to witness a rapid rise in demand. Conventionally, most embryos were transferred through fresh cycles. However, with technology refinement, the number of frozen embryo transfers and the success rates have increased. Moreover, the policy of freezing the embryos has also reduced the chances of ovarian hyper-stimulation. The frozen embryo transfers enable single egg transfer, thus, giving enough time for the endometrial layer to heal from the medicine stimulation effect. This ensures higher success rates.

Culture media dominated the overall market in terms of revenue in 2014. With the increasing government funding and industrial support for employees for egg/sperm freezing, the demand for cryopreservation and the needed media for it is expected to witness growth. There has been an increase in the research activities undertaken to improve the culture media and to procure maximum boar sperms or eggs, spurring market growth. Moreover, the increasing number of egg/sperm donor banks is expected to drive the demand for sperm, egg, and embryo processing media during the forecast period.

Europe dominated the IVF market in 2014. High quality of treatment offered at the most economical price, and the adherence to medical standards have contributed to its market leadership. In Europe, the NHS covers three IVF cycles and has also started providing coverage for gametes freezing. Moreover, the region is an attraction for international clients as countries, such as Spain, have the highest number of egg donors. The clinics also provide sex identification and other IVF treatments, which are not offered in North America.

North America also accounted for a significant share of the market in 2014. The standardization of procedures through automation, regulatory reforms, government funding for egg/sperm storage, and industry players introducing more IVF treatments are some contributing factors for North America.
dominating the IVF market.

The presence of favorable reimbursement framework (implementation of USD 50 million 5-year plans by the U.S Department of Defense for sperm/egg freezing coverage) is also expected to drive regional market growth over the next six years. The increasing number of clinics undertaking newer industrial techniques to offer better fertility success rates is also expected to boost the regional market demand.

The demand for IVF treatment is expected to boom in APAC owing to fertility tourism, increasing foreign industries trying to penetrate the economically developing countries and the changing regulatory landscape.

The Asia Pacific Initiative on Reproduction (ASPIRE), the task force of clinicians and scientists is involved in the monitoring and management of fertility and Assisted Reproductive Technology (ART). Such initiatives promote awareness levels thereby, driving growth.

Industry contributors are introducing newer automation to shift the IVF treatment from invasive to a minimally invasive or non-invasive procedure. The industry players are also trying technologies, which can enable older women to have enhanced fertility rates. For instance, in August 2015, OvaScience announced the results of its first published analysis comparing AUGMENT fertility treatment with a standard IVF. The results showed a significantly higher rate of selection and transfer of embryos as compared to the standard treatment.

Some key players in this market include EMD Serono Inc., Boston IVF, OvaScience, Thermo Fisher Scientific Inc., Vitrolife AB, Irvine Scientific, CooperSurgical, Inc., Cook Medical Inc., Genea Biomedx and Progyny Inc.

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