

UK In Vitro Fertilization - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts 2019 - 2029

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Report description:

The United Kingdom in vitro fertilization (IVF) market is expected to register a CAGR of 7.6% over the forecast period.

Key Highlights

-During the initial phases of the COVID-19 pandemic, many IVF clinics in the United Kingdom temporarily suspended their services or rescheduled non-urgent procedures. This was primarily due to prioritizing resources for COVID-19 patients, reducing the risk of virus transmission, and adhering to government-imposed restrictions. For instance, according to the article published by the National Center for Biotechnology Information (NCBI) in March 2021, the IVF treatment procedures were postponed from April to June months of the pandemic in the United Kingdom. Therefore, the postponement of IVF procedures significantly impacted the market growth initially. However, with the decrease in COVID-19 cases and the uplifting of lockdown restrictions in the country, the IVF market in the country picked up a significant pace and is expected to do the same during the forecast period.

-The major factors driving the market growth include the rising success rate of IVF technology, increasing awareness about IVF procedures, and delayed onset of pregnancy. In addition, the rising number of patients undergoing IVF treatment is also projected to augment market growth during the forecast period. For instance, according to the data released by the Human Fertilisation & Embryology Authority (HFEA) in June 2023, approximately 55,000 patients underwent IVF or donor insemination (DI) treatment at HFEA-licensed fertility centers in the United Kingdom in 2021. Therefore, this substantial number of patients seeking fertility treatments highlights the country's growing demand for assisted reproductive technologies. With advancements in medical technology, increasing awareness, and changing societal trends, the United Kingdom IVF market is poised for growth. This will likely lead to an expansion of fertility centers and the development of innovative treatments to cater to the rising demand, ultimately driving market growth. Furthermore, the surging government initiatives in the United Kingdom are also projected to drive market growth during the forecast period.

-For instance, in July 2022, the Government of the United Kingdom established the Women's Health Strategy in England to tackle

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the gender health gap, which is likely to drive the growth of the country's IVF market. The strategy aims to address the gender health gap and improve women's reproductive health and access to fertility treatments. By prioritizing women's health and reproductive rights, government regulation is expected to increase awareness and funding for IVF treatments. This could lead to improved accessibility and affordability of IVF services, encouraging more individuals and couples to seek fertility treatments. Consequently, the demand for IVF is likely to increase, driving the growth of the IVF market in the country.

-Therefore, factors such as the rising number of IVF procedures and surging government initiatives to support IVF in the country are expected to drive market growth during the forecast period. However, social stigma and ethical and legal issues associated with in vitro fertilization are estimated to hinder the market growth during the forecast period.

UK In Vitro Fertilization Market Trends

The Sperm Separation Systems Segment is Expected to Show Significant Growth During the Forecast Period

- Sperm separation systems are specialized medical devices or techniques used to separate sperm cells from other components of semen for various purposes, such as fertility treatments or reproductive technologies. These systems are designed to isolate high-quality sperm cells with optimal motility, morphology, and genetic characteristics. The separated sperm can then be used for various IVF techniques, such as conventional IVF, intracytoplasmic sperm injection (ICSI), or other advanced procedures, to improve the chances of successful fertilization and embryo development.

- The major factor driving the segment growth in the country includes the adoption of advanced sperm separation instruments in the country for the separation of sperm cells coupled with the growing adoption of IVF treatments. For instance, Care Fertility, one of the largest private fertility clinics in the United Kingdom, adopted Zymot for sperm separation. The introduction of innovative technologies like Zymot in the field of sperm separation systems is expected to drive the growth of the segment in the United Kingdom's IVF market. Zymot, a novel sperm selection device, offers potential benefits such as improved sperm quality, higher fertilization rates, and enhanced embryo development. These advantages can increase success rates in IVF procedures, attracting patients and fertility clinics to adopt this advanced sperm separation system.

- Patients seeking IVF treatments are increasingly aware of these advancements and may choose clinics or providers that offer state-of-the-art technologies like Zymot. The adoption of such advanced systems also stimulates competition among fertility clinics, prompting them to invest in infrastructure upgrades and offer the latest technologies to attract patients and stay ahead in the market. This overall trend is expected to fuel the growth of the sperm separation systems segment in the country during the forecast period.

- Furthermore, various companies present in the United Kingdom are starting to offer fertility benefits to their employees, which is projected to drive the demand for sperm separation systems in the country during the forecast period. For instance, according to an article published by Fertility First UK in February 2022, companies like Virgin Group are financially supporting IVF and other assisted fertility procedures like sperm separation systems in the nation.

- As per the same source, in the United Kingdom, other companies like NatWest, Centrica, Clifford Chance, and Cooley have also started offering similar fertility treatment benefits, with some providing up to GBP 45,000 (USD 57,808.4) towards medical bills. Therefore, with more companies embracing fertility benefits, it is likely to drive growth in the United Kingdom's In Vitro Fertilization (IVF) market by increasing access to funding for fertility treatments, which is projected to lead to higher demand for IVF and related services.

Fertility Clinics Segment is Expected to Hold the Significant Share of the Market During the Forecast Period

- Fertility clinics, also known as reproductive clinics or assisted reproductive technology (ART) clinics, are specialized healthcare

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facilities offering a range of fertility and reproductive health services. These clinics provide diagnosis, treatment, and support for individuals and couples experiencing difficulties in conceiving or having reproductive concerns.

- The factors driving the growth of the fertility clinics segment in the country include increasing demand for assisted reproductive technologies, advancements in reproductive technologies, and supportive government policies. For instance, according to the data published by the Human Fertilization & Embryology Authority (HFEA) in November 2021, there were around 103 fertility clinics licensed by the HFEA in the United Kingdom during 2020-2021 offering IVF treatment.
- As per the same source, there were 16 establishments licensed in the country during 2020-2021 to undertake research involving human embryos. Hence, the presence of a significant number of licensed fertility clinics, particularly privately owned ones, in the country enhances accessibility and fosters competition among clinics, driving growth in the fertility clinics segment.
- Furthermore, the decrease in the fertility rate in the country is also expected to drive segment growth during the forecast period. For instance, according to the article published by the University of Oxford in June 2023, the total fertility rate fell from 1.94 in 2010 to 1.55 in 2021 in the United Kingdom. Thus, as the fertility rate declines, more individuals and couples may face difficulties conceiving naturally, leading them to seek assistance from fertility centers. The demand for fertility treatments, including IVF and other assisted reproductive technologies, is likely to increase as a result.
- Fertility centers would be positioned to cater to this growing demand, leading to the expansion of their services, adoption of advanced technologies, and potentially attracting more investments and partnerships. Thus, a decrease in the fertility rate can drive the growth of fertility centers by responding to the population's rising need for fertility treatments, in turn driving the growth of the segment during the forecast period.

UK In Vitro Fertilization Industry Overview

The United Kingdom In Vitro Fertilization (IVF) market is moderately consolidated due to a limited number of companies that manufacture and distribute IVF products. The competitive landscape includes analyzing companies that hold notable market shares and are well known, including Vitrolife, CooperSurgical, Inc., Merck KGaA, IBSA Pharma Ltd, and Ferring Pharmaceuticals Ltd, among others.

Additional Benefits:

- The market estimate (ME) sheet in Excel format
- 3 months of analyst support

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