

In-Vitro Fertilization Services Market Assessment, By Procedure Type [Fresh Donor IVF, Fresh Non-Donor IVF, Frozen Donor IVF, Frozen Non-Donor IVF, Natural Cycle IVF, Embryo Banking], By Service Provider [Fertility Clinics, Hospitals, Surgical Centers, Cryobanks], By End-user [Couples, Single Women, LGBTQ+ Community], By Region, Opportunities and Forecast, 2018-2032F

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Report description:

Global in-vitro fertilization services market is projected to witness a CAGR of 10.30% during the forecast period 2025-2032, growing from USD 23.67 billion in 2024 to USD 51.86 billion in 2032. Recent developments in in-vitro fertilization (IVF) methods and the rising need for effective solutions have seen a huge expansion in the global market for in-vitro fertilization services. Declining reproductive health in most of the population due to changing environmental factors and sedentary lifestyles is one of the main reasons driving market expansion. Most of the population has a disposable income to take care of their health and spend on their well-being especially when it comes to such critical and life-altering operations. In addition, government investments in healthcare infrastructure, technological improvements, and the increasing need for state-of-the-art technologies are reinforcing the market's growth trajectory. Fast improvements in healthcare in emerging regions, especially in Asia-Pacific, offer profitable opportunities. For example, Conceptions Reproductive Associates of Colorado (Conceptions) was acquired by Reproductive Medicine Associates (RMA) in August 2023. Four of Conceptions' fertility clinics in Colorado will join RMA as part of the transaction. Changing Lifestyles Among People Boost Market Growth

Lifestyle changes have greatly contributed to the increased demand for in vitro fertilization (IVF) services globally. The growing tendency of postponed motherhood, fueled by late marriages, financial preparation, and career goals, is one of the main causes. Fertility decreases with maternal age, which is why many couples turn to assisted reproductive technologies (ART) such as IVF. Furthermore, hormonal imbalances and issues related to the reproductive system in both men and women have been connected to contemporary lives marked by high levels of stress, erratic sleep patterns, and unhealthy eating habits. Fertility treatments are

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required because of disorders including polycystic ovarian syndrome (PCOS) and decreased sperm quality, which are further aggravated by sedentary behavior and rising obesity rates. Furthermore, environmental risks that have been linked to decreased reproductive health include exposure to radiation, pollution, and endocrine-disrupting chemicals (EDCs). Substance abuse, such as excessive drinking, smoking, and drug use, also impairs fertility, leading some people to turn to IVF as a remedy. The IVF market is also growing because of changing social conventions, such as the growing acceptance of single parents and same-sex couples choosing assisted reproduction.

The need for IVF services is anticipated to increase as these lifestyle factors continue to affect conception rates, propelling improvements in reproductive medicine and increasing access to fertility care globally. For instance, as of 2023, approximately 12 million children have been born through assisted reproductive technologies (ART), with over 500,000 IVF deliveries occurring annually.

Technological Development and Integration of AI Fuel Market Growth

Due to technological improvements that have improved treatment efficiency and success rates, the global market is expanding significantly. IVF has become a more dependable choice for infertile couples over the past years because of advancements such as time-lapse imaging, preimplantation genetic testing (PGT), and embryo vitrification, which have increased implantation rates and decreased miscarriage risks. In addition to boosting patient confidence, these technical advancements have broadened the pool of eligible patients to include people with age-related infertility or genetic problems.

IVF is further revolutionized by automation and artificial intelligence (AI), which minimize human error and optimize embryo selection. Due to AI-driven models' capacity to precisely assess embryo viability, pregnancy success rates are surging. Furthermore, patients can maintain their fertility for later use by using cryopreservation techniques, such as storing oocytes and embryos, which raises the need for IVF services. IVF treatments are now more widely available and reasonably priced because of these developments, growing awareness, and increased investments in fertility clinics. Therefore, technological advancements in IVF remain a major driver of the market's steady expansion. For instance, a company based in the field of AI-based solutions for IVF clinics, called AIVF Ltd., joined forces with Genea Biomedx Pty Ltd, a medical device provider for IVF laboratories, in May 2023, to create a comprehensive and cost-effective integrated systems solution for personalized IVF. The collaboration brought together Genea Biomedx's Geri time-lapse incubator and AIVF Ltd.'s EMA AI platform, creating a powerful suite that offers widespread access to personalized and optimized IVF treatments.

Frozen Non-Donor IVF Segment Spearheads the Market Growth

Considering the market size and popularity, frozen non-donor IVF dominates the other IVF procedures because of its higher success rates, cost-effectiveness, and flexibility compared to fresh cycles. In this process, a woman's embryos from a prior cycle are frozen and used for implantation later. Due to improvements in cryopreservation methods, especially vitrification, frozen embryo transfers now have success rates that are on par with or even greater than those of fresh embryo transfers. One of the main benefits of frozen non-donor IVF is that it lessens the financial and physical burden on patients. Frozen cycles do not require recurrent ovarian stimulation and egg retrieval, which makes the procedure less invasive and less expensive than fresh IVF cycles.

Furthermore, frozen embryos are frequently subjected to preimplantation genetic testing (PGT), which guarantees the selection of genetically sound embryos and raises the likelihood of a successful pregnancy while lowering the risk of miscarriage. The demand for this operation has been greatly increased by the growing trend of fertility preservation, in which women preserve their embryos for later use. Furthermore, frozen non-donor IVF is a key driver of development in the global IVF market owing to the growing awareness, accessibility, and success of frozen cycles, further expanding its usage globally. Ovation Fertility and US Fertility merged in May 2023 to build a fertility platform that provides IVF and advanced fertility care, such as Frozen Non-Donor IVF, in the United States.

North America Dominates In-Vitro Fertilization Services Market Share

Due to strong regulatory support, high infertility rates, and advanced healthcare infrastructure, North America leads the global in-vitro fertilization (IVF) market. Due to delayed parenthood, changing lifestyle patterns, and greater awareness of fertility treatments, the region, especially the United States and Canada, has seen an increase in demand for assisted reproductive technologies (ART).

Furthermore, infertility issues affect a sizable section of the population, with variables such as stress, obesity, and environmental

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contaminants contributing to dwindling fertility rates. Technological developments further improve IVF success rates in North America in Preimplantation Genetic Testing (PGT), embryo cryopreservation, and artificial intelligence (AI)-based embryo selection. IVF is now more accessible to a wider audience due to the widespread availability of fertility clinics and specialist IVF centers and rising insurance coverage for infertility treatments. Furthermore, the market's reach has been broadened by the increasing acceptance of IVF among single parents and the LGBTQ+ community.

Innovative fertility solutions have been developed more quickly due to government initiatives and strong R&D funding from the corporate and governmental sectors. For instance, the U.S. FDA regulates drugs and devices used in IVF, followed by the CDC's implementation of the Fertility Clinic Success Rate and Certification Act. Moreover, semen analysis and sperm function tests are high-complexity tests regulated by the Clinical Laboratory Improvement Amendments of 1988 (CLIA '88) in the U.S. Strict compliance with standards and on-site inspections are essential. Significant medical tourism is also drawn to the area, especially by individuals seeking advanced care. Together, these factors position North America as the largest IVF market, with further expansion anticipated in the future.

Future Market Scenario (2025 – 2032F)

Many factors claim the growth of the in-vitro fertilization services market. Technological advancements provide faster, more accurate and promising results. Opportunity also lies in the increasing number of populations aware of such alternatives and choosing to beat the taboo associated with it. Promising government encompass providing healthcare infrastructure, funds to carry on research and development on a large scale, and a reliable distribution channel that ensures the solution reaches everyone. For instance, the capabilities of FUJIFILM Irvine Scientific, Inc.'s Presagen's Life Whisperer platform were extended in June 2023 to support clinical decision-making in IVF.

Key Players Landscape and Outlook

Key service providers in the in-vitro fertilization services industry utilize strategies such as mergers, acquisitions, partnerships, and new product launches to improve their services and competitiveness. Such efforts will propel significant growth in the market, allowing large-cap industry players to increase their presence and, therefore, find new opportunities in this market.

For instance, Merck KGaA launched Fertility Counts in May 2023 to address the social, economic, and societal issues brought on by low birth rates in the Asia-Pacific area.

Furthermore, Boston IVF and Cryoport, Inc. signed a three-year supply chain solutions agreement in April 2023 to facilitate shipping reproductive materials across the United States.

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