

MARKET REPORT



Fertilization Technique Market, By Technique (In Vitro Fertilization, Partial Zona Dissection, Subzonal Sperm Injection, Intracytoplasmic Sperm Injection), By End-Use (Fertility Centers, Hospital & Clinics, and Home Care Settings) and By Geography (EU, NA, APAC, LATAM, and MEA) – Analysis, Size, Share, Trends, & Forecast from 2020-2026

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REPORT HIGHLIGHT

The fertilization technique market was valued at USD XX billion by 2019, growing with XX% CAGR during the forecast period, 2020-2026.

The fertilization technique is the process of combining sperm fertilizing an egg in the female ovaries in an internal and external way. The internal fertilization process can be done by the three methods such as ovoviviparity in this egg held within females, oviparity in which egg laid outside female body, and the last viviparity in which the development occurs within female followed by live birth. As the name suggests, external fertilization is carried out in the external environment by a combination of egg and sperm outside the organism. These processes are carried out with the help of different techniques such as intrauterine insemination (IUT), subzonal sperm insemination (SUZI), intracytoplasmic injection of sperm (ICSI), embryo transfer (IVF/ET), and gamete intrafallopian transfer (GIFT).

Among the above-mentioned techniques, ICSI is the most common method of fertilization technique which is widely adopted among the sub-fertile women across the globe. Furthermore, in animals, the fertilization technique plays a vital role in the production of cows or bulls as it helps in the fulfillment of the dairy need of human beings.

Market Dynamics

A growing number of infertility cases in men due to low sperm count is one of the major driving factors for the development of the global fertilization technique market. For example, recently in 2019, the World Health Organization (WHO) stated that around 60–80 million couples (8%–10% of couples in the world) are being affected with infertility every year. Hence, the demand for different fertilization techniques is increasing among the infertility couple.

In addition, favorable government initiatives coupled with the introduction of new and advanced techniques fuel the industry growth to a great extent. For instance, in 2020, the government of the UK's Human Fertilisation and Embryology Authority (HFEA) in collaboration with the Competition and Markets Authority (CMA) developed guidance for IVF clinics. This collaboration was aimed to improve the success rate of fertility testing and develop effective IVF 'add-on' treatments. Furthermore, other factors such as advancement in technologies, increasing research, and development activities coupled with the rising number of U.S. FDA approvals will support the industry growth. Conversely, the risk associated while taking birth, high cost of treatment, lack of skilled healthcare workers for animal breeding, and high risk of the infections are likely to hamper the market growth in the coming future.

Technique Takeaway

In terms of technique, the worldwide fertilization technique market is categorized into Partial Zona Dissection (PZD), Subzonal Sperm Injection (SUZI), and Intracytoplasmic Sperm Injection (ICSI). Out of these, the ICSI category accounted for the majority of market share in 2019 and is anticipated to witness noteworthy growth during the study period. This is mainly due to the highest pregnancy rate provided with the ICSI technique. Through this test-tube fertilization technique, a single sperm cell is injected into the cytoplasm of an egg to achieve fertilization. On the contrary, segments such as PZD, and SUZI are projected to expand at the highest CAGR by the end of 2026.

End-user Takeaway

By end-user, the global market is classified into fertility centers, home care settings, and hospitals & clinics. Among which, the fertility centers have the majority of share for fertilization technique market owing to the presence of a number of the fertility center. On the flip side, hospitals & clinics are growing at a faster pace for the new childbirth owing to rising hospital expenditure all over the world.

Regional Takeaway

Regionally, the overall market is divided into North America, Middle East & Africa, Asia Pacific, Latin America, and Europe. North America is a dominating region for the growth of the fertilization technique market. Regional growth is attributed to the development of assisted reproductive technology using the IVF and ICSI techniques coupled with a rising number of infertility cases. As per the Center for Chronic Disease Control and Prevention (CDC), in the U. S., from 2011 to 2015, more than 61 million women (age group 15–44 years) were suffering from infertility out of which more than 7 million had received infertility services. Other factors such as a decline in fertility rate, a busy lifestyle, coupled with rising demand will create huge demand for this industry.

On the contrary, the Asia Pacific region is projected to grow with the fastest-growing rate throughout the forecast period. Favorable government policies are considered to be one of the important driving factors for Asia Pacific industry growth. For example, in the Asia Pacific region, recently in 2020, the Indian government has passed the assisted reproductive technology bill to regulate the in-vitro fertilization (IVF) clinics in the country. As per the bill estimated by the Indian government the IVF clinic business is valued USD 700 million and is expected to reach USD 1.45 Billion by 2026.

COVID-19 Impact

The fertilization technique market is adversely affected due to the sudden outbreak of COVID-19 all over the globe as this technique needs precautions and a certain environment to carry out. During the COVID-19, humans and animals may be subjected to a high risk of infection for the birth. Hence, the government has suggested stopping and freezing treatment for some time to avoid the infection to the child.

This has drastically been impacted due to the fear and issued certain guidelines to avoid the contact of corona-virus infection on a child's birth all over the world. For example recently in 2020, the American Society of Reproductive Medicine (ASRM) has been suggested to suspend initiation of new treatment cycles including IVF, ICSI, and other advanced techniques for childbirth. The organization also has been issued new guidelines like minimizing in-person interactions and increase utilization of telehealth with advice to avoid starting new treatment cycles.

Key Vendor Takeaway

The leading players of the global fertilization technique market include Virtus Health, Ovascience, Inc., Irvine Scientific, Thermo Fisher Scientific, Inc., Genea Biomedx, Organon & Co. (Merck Company), Boston IVF Fertility Clinic, CooperSurgical Fertility & Genomic Solutions, and Bayer AG.

Companies are actively involved in strategic joint ventures, collaboration, mergers, and acquisitions to capture a large customer base. In March 2018, Virtus Health Limited has been completed almost 90% stake of Complete Fertility Limited (CFL) with valued USD 6.95 Million to enhance the fertility care services in the UK. Furthermore, in Jan 2020, Bayer Ag has been expanded with collaboration of Evotec with a focus on women's pregnancy drugs.

The market size and forecast for each segment and sub-segments has been considered as below:

Historical Year - 2015 to 2018

Base Year - 2019

Estimated Year - 2020

Projected Year - 2026

TARGET AUDIENCE

Traders, Distributors, and Suppliers

Manufacturers

Government and Regional Agencies

Research Organizations

Consultants

Distributors

SCOPE OF THE REPORT

The scope of this report covers the market by its major segments, which include as follows:

GLOBAL FERTILIZATION TECHNIQUE MARKET KEY PLAYERS

Genea Biomedx Pty Ltd

Organon & Co. (Merck Company)

Boston IVF Fertility Clinic

Virtus Health

OvaScience

FUJIFILM Irvine Scientific, Inc.

Thermo Fisher Scientific, Inc.

CooperSurgical Fertility & Genomic Solutions

Bayer AG

Others

GLOBAL FERTILIZATION TECHNIQUE MARKET, BY TECHNIQUE

In Vitro Fertilization (IVF)

Partial Zona Dissection (PZD)

Subzonal Sperm Injection (SUZI)

Intracytoplasmic Sperm Injection (ICSI)

GLOBAL FERTILIZATION TECHNIQUE MARKET, BY END USERS

Home Care Settings

Fertility Centers

Hospital & Clinics

Others

GLOBAL FERTILIZATION TECHNIQUE MARKET, BY REGION

North America

The U.S.

Canada

Europe

Germany

France

Italy

Spain

United Kingdom

Rest of Europe

Asia Pacific

India

China

South Korea

Japan

Singapore

Rest of APAC

Latin America

Brazil

Mexico

Argentina

Rest of LATAM

The Middle East and Africa

Saudi Arabia

United Arab Emirates

Rest of MEA

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It is also our goal to help our clients ignore traditional research methods that require a large amount of capital, manpower, and most important of it all - the time. We know that these factors are precious to a company and always follow the latest research techniques that produce the required result in a short span of time.

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