

Surrogacy Market Report by Type (Gestational Surrogacy, Traditional Surrogacy), Technology (IVF with ICSI, IVF without ICSI, Intrauterine Insemination), Service Provider (Hospitals, Fertility Clinics, and Others), and Region 2024-2032

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Abstracts

The global surrogacy market size reached US\$ 183.4 Million in 2023. Looking forward, IMARC Group expects the market to reach US\$ 306.9 Million by 2032, exhibiting a growth rate (CAGR) of 5.8% during 2024-2032. The rapid expansion of fertility tourism, rising inability to conceive, easy availability of cost-effective surrogacy, and favorable reimbursement policies offered by governing authorities of numerous countries are some of the major factors propelling the market.

Surrogacy is a reproductive arrangement in which a woman, known as the surrogate or gestational carrier, agrees to carry and give birth to a child for another individual or couple. This method is often sought by individuals or couples facing fertility challenges or medical conditions that prevent pregnancy. There are two primary types of surrogacy: traditional surrogacy, where the surrogate's egg is used, and gestational surrogacy, where the embryo is created using either the intended mother's egg or a donor egg, and then implanted into the surrogate's uterus. Surrogacy involves legal agreements, medical procedures, and emotional considerations, and its legality varies across jurisdictions.

The increasing awareness of fertility challenges and the rising acceptance of non-traditional family structures will stimulate the growth of the surrogacy market during the forecast period. Couples and individuals facing reproductive obstacles see surrogacy as a viable solution to fulfill their desire for parenthood. Moreover, numerous advancements in reproductive technologies and medical procedures, coupled with

improved legal frameworks in certain regions, that facilitate safer and more reliable surrogacy arrangements are positively influencing the market growth. Apart from this, rapid globalization and ease of international travel have enabled intended parents to explore surrogacy options in countries with favorable regulations and lower costs, thereby propelling the market growth. Additionally, the growing support networks, advocacy groups, and online platforms provide information and emotional assistance to those considering surrogacy has accelerated the product adoption rate. Furthermore, the evolving cultural shift toward delayed parenthood and the rising instances of infertility are contributing to the market growth.

Surrogacy Market Trends/Drivers:

Increasing Acceptance and Awareness

The surrogacy market is experiencing a transformative shift due to the expanding acceptance and awareness of surrogacy as a legitimate path to parenthood. With evolving social attitudes and a more open discourse around fertility challenges, surrogacy has gained immense credibility and recognition across the globe. This trend is underpinned by a growing recognition of diverse family structures and an increased willingness to embrace alternative reproductive methods. As a result, more individuals and couples are exploring surrogacy as a viable solution, creating a broader and more receptive market for surrogacy services.

Advancements in medical technology

The surrogacy landscape has been revolutionized by significant advancements in medical technology. Techniques such as in vitro fertilization (IVF) and gestational surrogacy have become increasingly sophisticated and accessible worldwide. These innovations enable precise control over the surrogacy process, contributing to improved success rates and reduced medical risks for both surrogate mothers and intended parents. Advanced prenatal testing and medical monitoring further enhance the safety and success of surrogacy arrangements. This trend empowers individuals with fertility challenges and positions surrogacy as a more viable and efficient option within the broader spectrum of assisted reproduction.

Rising cross-border surrogacy arrangements

The surrogacy market is marked by a notable rise in cross-border arrangements, driven by the disparities in surrogacy laws across different countries. Intended parents from various nations with restrictive surrogacy regulations are seeking surrogacy services in

jurisdictions with more favorable legal environments. This has spurred the need for expert consulting services that navigate the complex web of legal, cultural, and logistical considerations in international surrogacy journeys. It underscores the global nature of the surrogacy market and emphasizes the necessity for a well-informed approach when pursuing cross-border surrogacy, ensuring compliance with legal frameworks while safeguarding the interests of all stakeholders involved.

Surrogacy Industry Segmentation:

IMARC Group provides an analysis of the key trends in each segment of the global surrogacy market report, along with forecasts at the global, regional and country levels from 2024-2032. Our report has categorized the market based on type, technology and service provider.

Breakup by Type:

Gestational Surrogacy

Traditional Surrogacy

Gestational surrogacy dominates the market

The report has provided a detailed breakup and analysis of the market based on the type. This includes gestational surrogacy and traditional surrogacy. According to the report, gestational surrogacy represented the largest segment.

Gestational surrogacy method, where a surrogate carries a pregnancy conceived using the intended parents' or donors' eggs and sperm, offers distinct advantages. It minimizes genetic ties between the surrogate and the child, addressing legal and emotional complexities. Gestational surrogacy also opens doors for individuals and couples facing fertility challenges, same-sex couples, and those seeking genetic diversity.

Moreover, the increasing precision of assisted reproductive technologies, such as in vitro fertilization (IVF), is propelling the success rates of gestational surrogacy. As a result, it provides a viable solution for intended parents and fosters a broader acceptance of surrogacy due to its streamlined legal and genetic frameworks, thus playing a pivotal role in driving the market forward.

Breakup by Technology:

IVF with ICSI

IVF without ICSI
Intrauterine Insemination

IVF with ICSI holds the largest share in the market

A detailed breakup and analysis of the market based on the technology has also been provided in the report. This includes IVF with ICSI, IVF without ICSI, and intrauterine insemination. According to the report, IVF with ICSI accounted for the largest market share.

IVF with Intracytoplasmic Sperm Injection (ICSI) is an advanced assisted reproductive technique that addresses male infertility challenges by directly injecting a single sperm into an egg, optimizing fertilization. This precision enhances the chances of obtaining viable embryos for transfer, thus increasing the success rates of surrogacy arrangements. IVF with ICSI enables intended parents to overcome complex fertility issues, expanding the pool of potential clients for surrogacy services.

Moreover, the higher success rates associated with this technique encourage intended parents to consider surrogacy as a reliable pathway to parenthood, fostering greater demand within the surrogacy market. The integration of IVF with ICSI enhances the medical feasibility of surrogacy and strengthens its reputation as an effective solution, fueling the market growth.

Breakup by Service Provider:

Hospitals
Fertility Clinics
Others

Fertility Clinics represent the most popular service provider

The report has provided a detailed breakup and analysis of the market based on the service provider. This includes hospitals, fertility clinics, and others. According to the report, fertility clinics represented the largest segment.

Fertility clinics play a pivotal role in propelling the market growth by providing essential medical expertise and infrastructure. These clinics offer a spectrum of advanced reproductive technologies, including in vitro fertilization (IVF) and embryo transfer procedures, which are fundamental to surrogacy. Their specialized services cater to

individuals and couples facing infertility challenges, making surrogacy a viable option. Fertility clinics provide comprehensive medical assessments, personalized treatment plans, and close monitoring throughout the surrogacy journey, ensuring the best possible outcomes.

Additionally, these clinics often collaborate with surrogacy agencies and legal experts, creating a seamless experience for intended parents and surrogates. As hubs of medical innovation and support, fertility clinics significantly the market growth by enabling successful pregnancies, facilitating family expansion, and nurturing the partnership between intended parents and surrogates.

Breakup by Region:

North America

United States

Canada

Asia-Pacific

China

Japan

India

South Korea

Australia

Indonesia

Others

Europe

Germany

France

United Kingdom

Italy

Spain

Russia

Others

Latin America

Brazil

Mexico

Others

Middle East and Africa

North America exhibits a clear dominance in the market

The report has also provided a comprehensive analysis of all the major regional markets, which include North America (the United States and Canada); Asia Pacific (China, Japan, India, South Korea, Australia, Indonesia, and others); Europe (Germany, France, the United Kingdom, Italy, Spain, Russia, and others); Latin America (Brazil, Mexico, and others); and the Middle East and Africa. According to the report, North America accounted for the largest market share.

North America held the biggest share in the market due to its favorable legal, medical, and social landscape. The region's well-established regulatory frameworks in countries like the United States and Canada provide a secure environment for surrogacy arrangements, assuring the rights of intended parents and surrogates, thereby propelling the market growth in North America. Advanced medical facilities and expertise in assisted reproductive technologies, coupled with a culturally accepting environment in North America, attract both domestic and international individuals and couples seeking surrogacy services.

Additionally, the region's diverse population and evolving perspectives on family structures has accelerated the adoption of surrogacy. As a result, North America emerges as a prominent hub within the surrogacy domain, catering to a wide range of intended parents while upholding ethical standards and legal protections.

Competitive Landscape:

Key players in the market are driving innovation through a range of strategies. Prominent surrogacy agencies are embracing digital platforms, streamlining communication between intended parents, surrogates, and medical professionals. They are also integrating advanced embryo screening techniques to enhance success rates and reduce the likelihood of genetic disorders. Some key players are exploring eco-friendly practices by incorporating sustainable approaches in fertility treatments. Collaborations with fertility clinics and legal experts are becoming more prevalent to ensure adherence to evolving regulatory frameworks. These innovations collectively underscore the commitment of key players to continually elevate the surrogacy experience through technological, medical, and holistic advancements. We also expect the market to witness new entrants, consolidation of portfolios, and increased collaborations to drive healthy competition within the domain.

The report has provided a comprehensive analysis of the competitive landscape in the market. Detailed profiles of all major companies have also been provided. Some of the key players in the market include:

Bourn Hall Clinic
CARE Fertility
Circle Surrogacy & Egg Donation
Extraordinary Conceptions
Growing Generations LLC
Houston Fertility Center
IVIRMA Global
Max Healthcare
New Hope Fertility Center
Nova IVF
Ovation Fertility
Scanfert Clinic

Recent Developments:

In June 2021, Circle Surrogacy & Egg Donation sponsored A Lifetime of Pride and Joy, a campaign that celebrates and encourages family equality by raising awareness around the accessibility of fertility care among the LGBTQ+ population. This impactful campaign is dedicated to the celebration and advancement of family equality, while also shedding light on the crucial aspect of accessible fertility care. By participating in this campaign, Circle Surrogacy takes a resolute stance in promoting inclusivity and understanding, embracing the diversity of modern families.

In June 2023, AHH's Nova IVF Fertility, a pioneering name in the realm of assisted reproductive healthcare, unveiled an ambitious roadmap that envisages the establishment of an impressive network of 100 centers within the next four years. This strategic expansion plan, as reported by the Economic Times, reflects the organization's unwavering commitment to providing accessible and advanced fertility care across India.

In October 2022, Ovation Fertility, a leading name in the field of assisted reproductive technology, unveiled an exciting and transformative partnership with Genomic Prediction. This collaboration marks a significant milestone in the realm of genetic testing, as it promises to not only enhance but also expand the horizons of genetic assessment within the domain of fertility and family planning. The alliance between Ovation® Fertility and Genomic Prediction showcases a shared commitment to leveraging cutting-edge scientific advancements to empower intended parents with a deeper understanding of their genetic profile and reproductive options.

Key Questions Answered in This Report

1. What was the size of the global surrogacy market in 2023?

2. What is the expected growth rate of the global surrogacy market during 2024-2032?
3. What are the key factors driving the global surrogacy market?
4. What has been the impact of COVID-19 on the global surrogacy market?
5. What is the breakup of the global surrogacy market based on the type?
6. What is the breakup of the global surrogacy market based on the technology?
7. What is the breakup of the global surrogacy market based on the service provider?
8. What are the key regions in the global surrogacy market?
9. Who are the key players/companies in the global surrogacy market?

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