

# **GCC In-Vitro Fertilization Market, By Technique (ICSI In-Vitro Fertilization, Non-ICSI/Traditional In-Vitro Fertilization), By Reagent (Embryo Culture Media, Cryopreservation Media, Sperm Processing Media, Ovum Processing Media), By Instruments (Imaging Systems, Sperm Separation Systems, Ovum Aspiration Pumps, Incubators, Micromanipulator Systems, Cryo-systems, Others), By Infertility (Female v/s Male), By Embryo (Frozen-Thawed Embryo v/s Fresh Embryo), By Application (Fertility Clinics, Hospitals, Others), By End-User (Locals, Expats, Medical Tourists), By Country and Competition, Forecast & Opportunities, 2018-2028F**

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## **Abstracts**

The GCC In-Vitro Fertilization Market was valued at USD 993.05 Million in 2022 and is anticipated to project robust growth in the forecast period with a CAGR of 6.75% through 2028. The In Vitro Fertilization (In-Vitro Fertilization) market in the Gulf Cooperation Council (GCC) region is experiencing significant growth and transformation, reflecting evolving societal trends and advances in reproductive medicine. GCC countries, including Saudi Arabia, the United Arab Emirates, Qatar, Oman, Bahrain, and Kuwait, have witnessed a notable rise in infertility rates, attributed to factors such as delayed childbearing, lifestyle changes, and increased awareness of fertility treatments. The GCC In-Vitro Fertilization market is characterized by an increasing demand for assisted reproductive technologies (ART), with a particular focus

on In-Vitro Fertilization procedures. This surge can be attributed to changing family dynamics, where couples are often opting for smaller families and postponing parenthood.

Furthermore, the region's healthcare infrastructure has seen substantial improvements, with a growing number of specialized fertility clinics and centers offering cutting-edge In-Vitro Fertilization treatments and services. Governments in the GCC have also recognized the importance of reproductive health, leading to favorable policies and regulations that support and regulate the In-Vitro Fertilization industry. Rapid advancements in In-Vitro Fertilization technology, including preimplantation genetic testing (PGT) and in vitro maturation (IVM), have bolstered the success rates of fertility treatments in the GCC. The market also benefits from increasing medical tourism, with individuals from neighboring regions seeking high-quality and accessible In-Vitro Fertilization services in the GCC. In conclusion, the GCC In-Vitro Fertilization market is poised for continued expansion, driven by changing demographics, improved healthcare infrastructure, favorable regulatory environments, and ongoing advancements in reproductive medicine. This sector is expected to play a pivotal role in addressing infertility-related challenges in the region.

## Key Market Drivers

### Rising Prevalence of Infertility is Thriving the GCC In-Vitro Fertilization Market

Infertility is highly prevalent today. According to Research gate, in the GCC countries, clinical fertility and the demographic fertility report as 17.2% and 38.5%, respectively. Infertility can be caused by many factors, including lifestyle changes, stress, hormonal imbalances, medical conditions, and aging. In GCC countries, changes in social conditions such as late marriage, work-oriented lifestyles, and urbanization are leading to an increase in infertility. The main symptom of infertility is the inability to conceive and about one-third of the infertility rises from female factors. In the remaining cases, the cause is either unknown or a combination of male and female infertility issues.

Factors such as rising obesity rates, sexually transmitted infections (STIs), and environmental pollution have also led to an increase in fertility problems in GCC countries. As per the National Library of Medicine, the prevalence of obesity among female children and adolescents in Gulf Countries ranged from 3% to 18% in 2020.

There are a number of factors which contribute to the growth of the GCC in-vitro fertilization market. Firstly, the increasing prevalence of infertility has led to a higher

demand for In-Vitro Fertilization treatments. Couples who are unable to conceive naturally are turning to In-Vitro Fertilization as a viable option to fulfill their desire to have a child. Additionally, advances in reproductive technology and increasing success rates of In-Vitro Fertilization have increased the confidence of couples seeking fertility treatments, further increasing the demand for In-Vitro Fertilization services in the GCC countries.

Secondly, the growing awareness and acceptance of infertility as a medical condition in the GCC have led to more couples seeking professional help. Earlier, infertility was often stigmatized or kept hidden due to cultural or societal reasons. However, with changing mindsets and increasing awareness about infertility and its treatments, more couples are coming forward to seek fertility treatments, including In-Vitro Fertilization, leading to increased adoption among people with infertility conditions.

According to research carried out by ART Fertility Clinics, infertility rates in GCC states in 2020 were as high as 35 to 40 percent. Furthermore, the prevalence of polycystic ovary syndrome among women in the GCC countries is contributing to the growth of the market. As per the National Library of Medicine, at least 20%-25% of women in the Gulf region suffer from PCOS.

### Rising Awareness and Literacy Rate in the GCC Region

One of the main drivers of the increased demand for In-Vitro Fertilization is the growing awareness of infertility and available treatment options. Changes in social norms and increased access to information via the internet and social media have led couples to more openly discuss fertility issues and seek help from fertility clinics. Moreover, the GCC has a strong culture of health promotion and many GCC organizations and NGOs are actively working to raise awareness in the field of infertility and pregnancy. Furthermore, celebrities and public figures openly sharing their In-Vitro Fertilization success stories have played a significant role in raising awareness and reducing the stigma associated with infertility.

For ensuring the safety and ethical practice of In-Vitro Fertilization, legal frameworks have also been developed by governments. These regulations assure that fertility centers adhere to comprehensive quality standards, protect patients' privacy and comply with proper procedures for processing and storage of embryos. It also contributed to the growing need for In-Vitro Fertilization, by building trust between couples that sought services in this area. For instance, Dubai Fertility Centre was established in collaboration between Dubai Health Authority and London Fertility

Centre. The Centre provides a comprehensive and Innovative range of infertility treatments solutions for couples who live in the United Arab Emirates, and visiting couples in the other countries, especially GCC. The center's objectives is to provide specialized fertility services within the Gulf region. Furthermore, the new In-Vitro Fertilization law was announced by the President of the United Arab Emirates, which allowed the fertility centers to freeze unfertilized eggs, sperms, and human embryos, thereby driving the growth of the GCC in-vitro fertilization market.

As per the National Library of Medicine, there is a direct relationship between the literacy and infertility rate, which show that the prevalence of infertility decreases significantly with the rising literacy rates in the GCC region. Moreover, it was found that high literacy rates were associated with a higher rate of infant survival. As per the United Nations Population Fund, Oman has the highest literacy rate of 93.3% in the GCC followed by Kuwait, that is 86.5%.

Women in resource-poor, predominantly immigrant communities seeking fertility treatment have greater knowledge gaps in fertility and lower levels of health literacy than women in well-resourced clinical settings. Hence, rising literacy levels especially among the women in GCC are expected to spur the growth of the GCC in-vitro fertilization market during the forecast period.

### Rising Reproductive Tourism

The number of medical tourists travelling to the United Arab Emirates for fertility treatment, especially In-Vitro Fertilization, is increasing. Medical tourists from all over the Gulf Cooperation Council, East and North Africa, the Indian subcontinent, and Asia prefer to travel to the United Arab Emirates for world class healthcare, ease of access and competitive affordability offered by the country, which is spurring the growth of the GCC in-vitro fertilization market.

To promote and develop the domestic medical tourism market, infertility centers in the GCC provides Skype consultations for patients, coordinates the stimulation process in their home countries, and also arranges medical visas, hotel accommodation and transportation, which augments the growth of the market. As per the Dubai Health Authority, medical tourist spending in Dubai was reported to be 198.75 million USD in 2021. In 2021, Dubai received 630,000 tourists from abroad for healthcare. In 2021, the top three regions for fertility treatment in Dubai were Asia (34%), Africa (24%), and Europe (19%).

As per the Medical Tourism Association (MTA), Abu Dhabi has been placed 8th out of 46 destinations in 2020 to 2021 health tourism rankings and 9th for quality of facilities and services. Several factors are responsible for increasing reproductive medical tourism in GCC. These include, high quality medical treatment, strict safety measures and regulatory, advanced medical technologies, easy accommodation, and the well certified and professional healthcare team, which attracts a large number of tourist around the globe for infertility treatment.

The Government of the United Arab Emirates launched Medical tourism portals (Abu Dhabi Medical Tourism portal, Dubai Health Experience) to allow international tourist to book appointment for various procedures, as well as access to a wide range of tourism services. Services range from direct contact with healthcare providers, visa issuance, reservation of accommodation and transport for travel to other recreational activities.

In addition, GCC countries are excellent destination for relaxing and recuperating from medical procedures due to the heat and humidity of their climate, which is responsible for attracting reproductive tourism, thereby driving the growth of the GCC in-vitro fertilization market.

## Key Market Challenges

### Lack of Skilled Professionals

The success of In-Vitro Fertilization treatment heavily relies on the expertise of skilled professionals and the availability of state-of-the-art infrastructure. The GCC countries face a shortage of skilled fertility specialists, embryologists, and nurses specialized in reproductive medicines. Inadequate training programs and limited professional development opportunities contribute to the scarcity of experienced professionals in the field. Additionally, the lack of well-equipped fertility clinics and laboratories poses challenges to the delivery of high-quality In-Vitro Fertilization services.

Unskilled healthcare professionals reduces the success rate of the treatment and are further deteriorating the fertility of people, which may hamper the growth of the market during the forecast period.

### Risks and Side Effects

In-Vitro Fertilization treatment increases the risks of congenital abnormalities in babies born through In-Vitro Fertilization. Also, embryonic arrest substantially reduces the

success rate of the treatment. Also, eggs quality and quantity are decreasing with the age of women. In-Vitro Fertilization also increases the probability of premature birth. As women age, it is well known that their chances of pregnancy decrease, which results in the discontinuation of the treatment.

Also, the serious side effects associated with the in-vitro fertilization ovarian hyperstimulation syndrome (OHSS), allergic reactions, hot flashes, bruising and soreness, nausea and vomiting, weight gain, and abnormal spotting are hampering couples from undergoing the In-Vitro Fertilization treatment, which may hamper the growth of GCC in-vitro fertilization market during the forecast period.

### High Cost

The high cost of In-Vitro Fertilization treatment acts as a barrier for many couples who may not have the financial means to pursue fertility treatments.

Also, the cost for every couple vary, depending upon the various health conditions, requirements and the number of In-Vitro Fertilization cycles opted by the patient, which adversely impacts the market growth. In-Vitro Fertilization procedures can be expensive, including costs associated with medications, laboratory procedures, and consultations. Additional ultrasounds and scans, further increase the overall cost of the treatment.

Limited insurance coverage for In-Vitro Fertilization procedures adds to the financial burden, making it difficult for a broader segment of the population to access In-Vitro Fertilization services. Such factors may hamper the growth of the market in the coming years.

### Key Market Trends

#### Increasing Insurance Coverage

The GCC in-vitro fertilization market is expanding as many insurance companies in the GCC are expanding coverage for infertility treatments, including In-Vitro Fertilization. This is making these treatments more accessible and affordable for a larger segment of the population, thereby driving market growth. For instance, comprehensive health insurance policies, including coverage for In-Vitro Fertilization treatments and conditions, can be provided by CCW global to the United Arab Emirates, which will further propel the growth of the market during the projected period.

## Improving Testing Techniques

Diagnostic techniques are an important integral part of the In-Vitro Fertilization process. The continuously evolving testing techniques have eventually led to the increasing pregnancy rates among the women. The development of new genetic test is prompting the demand for In-Vitro Fertilization treatment. The tests are now allowing embryos to be evaluated more deeply and for the detection of disease. For the purpose of detecting abnormalities, specific diseases and for the purpose of general screening, which can contribute to the growth of the GCC in-vitro fertilization market during the forecast period. If the cost is affordable, genetic testing will be carried out on all embryos. The ultimate goal of In-Vitro Fertilization continues to be the detection of the best embryo, but while this is improving, there is still a lack of a clinically relevant breakthrough in this area.

## Training and Infrastructure Development

Investing in training programs for healthcare professionals specializing in reproductive medicine is crucial. Additionally, improving the infrastructure and resources available in fertility clinics and laboratories can enhance the quality and accessibility of In-Vitro Fertilization services. Also, with the increasing certified healthcare professionals the success rate of the treatment will also increase, which will further attract more patients for undergoing In-Vitro Fertilization. There is also a growing emphasis on quality and accreditation in market. Clinics and fertility centers are focusing on obtaining internationally recognized accreditations and certifications to ensure patient safety, adhere to ethical standards, and enhance trust among prospective patients.

## Advances in Technology and Rising Innovations

Innovations associated with fertility treatment helps in the improvement of the health and wellbeing of the baby through genetic screening and testing. These innovations are also beneficial to reducing the risk of certain types of genetic disease, in addition to addressing fertility problems. Automatization of the In-Vitro Fertilization laboratory will give rise to another stage in In-Vitro Fertilization that is more accessible. It will be more reproducible, with a smaller variation in the centers. The emergence of innovative technologies is the latest development in embryo culture medium such as embryonic genetic testing, detection of genetic diseases before the transfer of embryos, and oocyte preservation, which are already creating standard shifts in the field of assisted reproduction technology.

## Favorable Laws and Regulatory

Governments and healthcare providers should explore options to reduce the financial burden of In-Vitro Fertilization treatment. This can include insurance coverage for fertility treatments or the establishment of financial assistance programs. Also, the new In-Vitro Fertilization law provides framework for intragovernmental consultation and decision making in the field of fertility treatment, which will allow increasing research into the area of the fertility treatments. Harmonizing In-Vitro Fertilization regulations across GCC countries can reduce inconsistencies and provide a clear legal framework for In-Vitro Fertilization practices. Regular review and updating of regulations can ensure they keep pace with advancements in reproductive technologies.

## Segmental Insights

### Technique Insights

Based on the technique, ICSI (Intracytoplasmic Sperm Injection) In-Vitro Fertilization has emerged as the dominant choice in the GCC In-Vitro Fertilization market for several compelling reasons. First and foremost, ICSI is highly effective in addressing male infertility issues, which are prevalent in the region. Lifestyle factors, such as high rates of obesity and tobacco use, have contributed to male fertility problems, making ICSI a preferred method for overcoming these challenges by directly injecting a single sperm into an egg, bypassing natural barriers.

Furthermore, ICSI is known for its high success rates, making it a preferred choice for couples seeking fertility treatment. Its precision and ability to enhance fertilization have made it a reliable option, especially in cases where conventional In-Vitro Fertilization techniques may have failed. This high success rate aligns with the aspirations of GCC couples who often seek fertility treatments with the expectation of successful outcomes. The GCC region's commitment to advanced healthcare and technology has also driven the popularity of ICSI In-Vitro Fertilization. Fertility clinics and centers in the GCC offer state-of-the-art facilities and well-trained medical professionals proficient in ICSI techniques. The growing medical tourism industry in the region attracts patients from neighboring countries, further promoting the dominance of ICSI In-Vitro Fertilization in the GCC In-Vitro Fertilization market. In summary, ICSI In-Vitro Fertilization's effectiveness in addressing male infertility, its high success rates, and the region's advanced healthcare infrastructure collectively contribute to its dominant position in the GCC In-Vitro Fertilization market, meeting the growing demand for effective fertility



treatments in the region.

## Reagent Insights

Based on the reagent, Embryo culture media holds a dominant position in the GCC In-Vitro Fertilization (In Vitro Fertilization) market due to its pivotal role in ensuring the successful development of embryos during the critical early stages of In-Vitro Fertilization treatment. Several factors contribute to its dominance: Embryo culture media provide a carefully controlled environment for embryos to thrive. In the GCC, where environmental conditions can be harsh, this level of control is crucial for maximizing the chances of successful embryo development. These media are designed to mimic the natural conditions of the female reproductive tract, promoting healthy embryo growth. In a region where infertility rates are on the rise, optimizing these conditions is paramount.

The use of high-quality embryo culture media has been linked to improved In-Vitro Fertilization success rates, aligning with the expectations of couples seeking fertility treatments in the GCC. GCC countries often have stringent regulations to ensure the safety and efficacy of medical products, including those used in In-Vitro Fertilization. The presence of reliable and approved embryo culture media in the market meets these regulatory standards.

Fertility clinics and centers in the GCC region have access to advanced technology and medical expertise, further emphasizing the importance of using quality embryo culture media to achieve optimal outcomes. In conclusion, embryo culture media's role in supporting healthy embryo development, its ability to enhance In-Vitro Fertilization success rates, and its alignment with regional regulations and clinical expertise make it the dominant choice in the GCC In-Vitro Fertilization market, offering hope and solutions to couples struggling with infertility.

## Country Insights

Saudi Arabia stands out as a dominant force in the GCC In-Vitro Fertilization (In Vitro Fertilization) market for several compelling reasons:

Saudi Arabia reports some of the highest infertility rates in the region, attributed to factors such as delayed childbearing and lifestyle changes. This elevated demand for fertility treatments makes the Saudi market one of the largest and most influential in the GCC. The country boasts a well-developed healthcare infrastructure, featuring state-of-

the-art fertility clinics and centers equipped with advanced technology and experienced medical professionals. This infrastructure enables the delivery of high-quality In-Vitro Fertilization services and attracts patients from neighboring countries. Saudi Arabia has implemented regulations and standards to ensure the safety and efficacy of In-Vitro Fertilization treatments, promoting the use of approved and reliable technologies and methodologies. The Saudi government has shown a commitment to supporting healthcare initiatives, including fertility treatments. This support encourages the growth and accessibility of In-Vitro Fertilization services within the country.

Cultural norms and religious beliefs in Saudi Arabia emphasize the importance of family and parenthood, driving individuals and couples to seek fertility treatments, including In-Vitro Fertilization, when faced with infertility issues. In summary, Saudi Arabia's high demand for fertility treatments, well-established healthcare infrastructure, regulatory support, government initiatives, and cultural factors collectively position it as the dominant player in the GCC In-Vitro Fertilization market, making it a key hub for individuals seeking solutions to infertility challenges.

#### Key Market Players

HealthPlus Fertility & Women's Health Center

King Faisal Specialist Hospital and Research Center (KFSH&RC)

Thuriah Medical Center

Fakih In-Vitro Fertilization Fertility Center

ART Fertility Clinics

New Hope In-Vitro Fertilization

AlReem Medical Center

Wara Hospital

Royale Hayat Hospital

Quttainah Specialized Hospital

Feto Maternal Medical Centre

Elite Medical Center

Bahrain Gynecology and Infertility Center

Al Baraka Fertility Hospital

Janeen Fertility & Genetics Centre

Dr. Sulaiman Al Habib Medical Group

Dr. Samir Abbas Hospital

Mediclinic Middle East

Al Ahli Hospital LLC

Al Tai Medical Center

Report Scope:

In this report, the GCC In-Vitro Fertilization Market has been segmented into the following categories, in addition to the industry trends which have also been detailed below:

GCC In-Vitro Fertilization Market, By Technique:

ICSI In-Vitro Fertilization

Non-ICSI/Traditional In-Vitro Fertilization

GCC In-Vitro Fertilization Market, By Reagent:

Embryo Culture Media

Cryopreservation Media

Sperm Processing Media

Ovum Processing Media

GCC In-Vitro Fertilization Market, By Infertility:

Female

Male

GCC In-Vitro Fertilization Market, By Embryo:

Frozen-Thawed Embryo

Fresh Embryo

GCC In-Vitro Fertilization Market, By Applications:

Fertility Clinics

Hospitals

Others

GCC In-Vitro Fertilization Market, By End User:

Locals

Expats

Medical Tourists

GCC In-Vitro Fertilization Market, By Country:

Saudi Arabia

UAE

Oman

Kuwait

Qatar

Bahrain

## Competitive Landscape

Company Profiles: Detailed analysis of the major companies present in the GCC In-Vitro Fertilization Market.

## Available Customizations:

The GCC In-Vitro Fertilization Market report with the given market data, Tech Sci Research offers customizations according to a company's specific needs. The following customization options are available for the report:

## Company Information

Detailed analysis and profiling of additional market players (up to five).

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