

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

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Abstracts

GCC in-vitro fertilization market was valued at USD 993.05 million in 2022 and is further anticipated to grow at a CAGR of 6.75% during the forecast period owing to rising reproductive tourism and the increasing cases of male and female infertility. This can be ascribed to the availability of funding and an increase in research activities to improve the culture media across the region, and industry players are introducing disposable devices, such as needles, slides, and chambers, to meet the sterility and regulatory requirements. Also, the increasing adoption of disposable IVF devices will further drive the growth of the GCC in-vitro fertilization market during the forecast period.

Additionally, the rising demand for ART treatments and the increasing number of fertility clinics and ART centers are influencing the growth of the GCC in-vitro fertilization

market over the years. Also, increasing accessibility and availability of potential treatments are fueling the growth of the market over the years. Furthermore, the increasing infertility rate due to changes in lifestyles, such as the increased prevalence of obesity and stress, lack of exercise, improper eating habits, and lack of nutrition, are the major factors driving the growth of the market. According to a research article, the total fertility rate has declined in the UAE since 2000, with the average number of births per woman falling from 2.7 to 1.5 in 2020.

Increasing Infertility Rate

Rising infertility rates play a crucial role in accelerating the growth of the GCC in-vitro fertilization market. Infertility is defined as the inability of a couple to conceive after a year of regular, unprotected intercourse. Different factors, such as increasing obesity rate and leading sedentary lifestyle, contribute to increasing infertility rates in the region, and these factors have a direct impact on the demand for fertility treatments, particularly IVF. As infertility rates increase, there is a larger pool of couples seeking solutions to their fertility challenges. This expanding demographic of potential patients directly drives the demand for IVF services in the GCC. The need to address infertility issues creates a significant market opportunity for IVF clinics and providers in the region. According to an article, the current fertility rate for Kuwait in 2023 is 2.031 births per woman, a 0.68% decline from 2022.

Social and cultural changes in the GCC have led to a trend of delayed childbearing. Many couples are choosing to focus on their careers and personal development, resulting in delayed attempts to conceive. However, female fertility declines with age, and as more couples postpone parenthood, they may encounter difficulties getting pregnant naturally. IVF becomes a viable option for those seeking to overcome age-related fertility challenges. Lifestyle factors such as stress, sedentary lifestyles, poor diet, and obesity can contribute to infertility. The prevalence of these factors in the GCC region can lead to higher rates of infertility. So, more couples turn to IVF as a potential solution, propelling the growth of the GCC in-vitro fertilization market. Some environmental factors, including exposure to pollutants and chemicals, may also contribute to infertility. The rapid urbanization and industrialization in some GCC countries can potentially impact reproductive health, leading to increased infertility rates. In cases where natural conception or other fertility treatments prove ineffective, IVF remains a widely accepted and effective option for achieving pregnancy. The limited availability of alternative treatments for severe cases of infertility makes IVF a more sought-after solution, further driving the growth of the GCC in-vitro fertilization market.

Growing Support from the Government

Supportive government initiatives play a crucial role in influencing the growth of the GCC in-vitro fertilization market. The governments of the Gulf Cooperation Council (GCC) countries have recognized the importance of healthcare and reproductive services, including assisted reproductive technologies such as in-vitro fertilization (IVF). By implementing policies and offering support in various ways, these governments have contributed to the expansion and accessibility of IVF services. Some GCC governments provide financial support or subsidies to couples undergoing fertility treatments, including IVF. Financial assistance can significantly reduce the economic burden of IVF procedures, making them more accessible to a broader segment of the population. Subsidies or insurance coverage for IVF treatments encourage more couples to seek fertility assistance, thereby driving the demand for IVF services in the region. Since 2022, Saudi Arabia's Health Insurance Council has been carrying out studies regarding infertility treatment under the coverage of medical insurance.

GCC governments have invested in the development of modern healthcare infrastructure, including specialized facilities for IVF treatments. This investment ensures that there are well-equipped and state-of-the-art IVF clinics across the region capable of providing advanced fertility treatments. Improved infrastructure enhances the overall healthcare system's capabilities and attracts both local and international patients seeking IVF services. By promoting awareness and understanding of IVF, these campaigns help reduce the stigma associated with infertility and encourage more couples to seek professional help. Greater awareness leads to an increased demand for fertility services, which, in turn, will boost the growth of the GCC in-vitro fertilization market during the projected years.

Growing Advancements in IVF Technology

Advancements in IVF technology have a profound impact on influencing the growth of the GCC in-vitro fertilization market. As research and innovations in reproductive medicine progress, the efficiency, safety, and success rates of IVF procedures improve, making the treatment more attractive to individuals and couples facing infertility challenges. Improved IVF techniques and technologies, such as preimplantation genetic testing (PGT), time-lapse imaging, and advanced embryo selection methods, have led to higher success rates in IVF procedures. Higher success rates instill confidence in prospective patients, making IVF a more appealing and reliable option for those seeking fertility treatments. As word spreads about the improved outcomes, the demand for IVF services rises, contributing to the growth of the GCC in-vitro fertilization market.

Innovations such as the vitrification of embryos (a technique used for cryopreservation) have significantly improved the survival rate of frozen embryos and reduced the risk of multiple pregnancies during IVF treatments. As IVF becomes safer and less invasive, more individuals are encouraged to undergo fertility treatments, driving the expansion of the GCC in-vitro fertilization market. The integration of cutting-edge technology in IVF allows for the customization of treatment plans based on each patient's specific needs and medical history. This personalized approach increases the chances of successful outcomes and minimizes the risk of unnecessary procedures, making IVF a more attractive option for couples with varying infertility issues. As personalized treatment becomes more widely available, the demand for IVF services grows. In June 2023, the Oman International Hospital assisted reproductive technology treatment services center, which was officially inaugurated by HH Sayyida Hujaija Jaifer Aal. The hospital provides fertility treatment services using cutting-edge technology from Vitrolife and Olympus, as well as an advanced infrastructure and a multidisciplinary team of consultants and embryologists.

Growing Reproductive Tourism

Medical tourism plays a substantial role in influencing the growth of the GCC in-vitro fertilization market. The region has become an increasingly popular destination for international patients seeking fertility treatments, including in vitro fertilization (IVF). Medical tourism attracts a significant number of patients from neighboring countries and beyond GCC IVF centers. These patients often travel to the region seeking high-quality, cost-effective, and technologically advanced IVF treatments that may not be readily available or affordable in their home countries. The influx of international patients boosts the demand for IVF services in the GCC, leading to the expansion of the GCC in-vitro fertilization market.

Medical tourism, including fertility treatments such as IVF, contributes significantly to the GCC's healthcare industry and economy. The revenue generated from international patients seeking IVF services helps enhance the financial viability of IVF clinics and facilities in the region. The additional revenue allows for further investments in advanced technology, infrastructure, and staff training, ultimately improving the quality of IVF services offered. A strong reputation for offering high-quality IVF treatments to international patients can boost the credibility and accreditation of IVF centers in the GCC. Positive experiences and successful outcomes shared by medical tourists contribute to the centers' recognition and draw in more patients, including locals, who are influenced by the reputation of these facilities. Medical tourists often require various

ancillary services, such as accommodation, transportation, and post-treatment care. This increased demand creates opportunities for related industries, including hospitality and travel, leading to economic growth in the region. The presence of a thriving medical tourism sector complements the growth of the GCC in-vitro fertilization market.

Recent Developments

In 2021, HealthPlus Fertility Centers announced that they were planning to establish 3 more centers in the Kingdom of Saudi Arabia (KSA) by the end of 2022.

On November 23, 2020, United Eastern Medical Services (UEMedical), a prominent healthcare group in the UAE, joined the growing list of healthcare providers who have embraced Okadoc's personalized booking and telemedicine system and successfully implemented the Okadoc system for two of its subsidiaries in the UAE, Health Plus Network of Specialty Centers and Danat Al Emarat Hospital and Clinics.

Market Segmentation

The GCC in-vitro fertilization market can be segmented by technique, reagent, instruments, infertility, embryo, application, end-user, and country. Based on technique, the market can be divided into ICSI IVF, non-ICSI/traditional IVF. Based on the reagent, the market can be segmented into embryo culture media, cryopreservation media, sperm processing media, and ovum processing media. Based on instruments, the market can be segmented into imaging systems, sperm separation systems, ovum aspiration pumps, incubators, micromanipulator systems, cryo-systems, and others. Based on infertility, the market can be divided into female and male. Based on embryos, the market can be divided into frozen-thawed embryos and fresh embryos. Based on application, the market can be segmented into fertility clinics, hospitals, and others. Based on end-user, the market can be differentiated into locals, expats, and medical tourists. Based on countries, the market can be categorized into Saudi Arabia, UAE, Oman, Kuwait, Qatar, and Bahrain.

Market Players

HealthPlus Fertility & Women's Health Center, King Faisal Specialist Hospital and Research Center (KFSH&RC), Thuriyah Medical Center, Fakhri IVF Fertility Center, ART

Fertility Clinics, New Hope IVF, AlReem Medical Center, Wara Hospital, Royale Hayat Hospital, Quttainah Specialized Hospital, The 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, and Al Tai Medical Center are some of the leading players operating in the GCC in-vitro fertilization market.

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 IVF

Non-ICSI/Traditional IVF

GCC In-Vitro Fertilization Market, By Reagent:

Embryo Culture Media

Cryopreservation Media

Sperm Processing Media

Ovum Processing Media

GCC In-Vitro Fertilization Market, By Instruments:

Imaging Systems

Sperm Separation Systems

Ovum Aspiration Pumps

Incubators

Micromanipulator Systems

Cryo-systems

Others

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 Application:

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:

With the given market data, TechSci 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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