

India In-vitro Fertilization Market By Technique (ICSI IVF, Non-ICSI/ Traditional IVF), By Product (IVF Culture Media, ICSI Machine, IVF Incubators, Cryosystem, Others), By Donor (Fresh Non-donor, Frozen Non-donor, Fresh Donor, Frozen Donor), By Infertility (Male, Female), By Embryo (Fresh Embryo, Frozen-thawed Embryo), By End User (Fertility Clinics, Hospitals, Others), By Region, Competition, Forecast & Opportunities, 2019-2019F

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Abstracts

India In-vitro Fertilization Market has valued at USD 845.07 Million in 2023 and is anticipated to project impressive growth in the forecast period with a CAGR of 8.92% through 2029. In vitro fertilization (IVF), a type of assisted reproductive technology (ART), has revolutionized the field of infertility treatment. It offers a glimmer of hope to couples struggling to conceive by providing a way to overcome various fertility concerns. The process begins with the extraction of eggs and sperm, which are then carefully fertilized in a state-of-the-art laboratory. The resulting embryos are meticulously evaluated before being delicately implanted into the uterus.

IVF is a comprehensive and intricate procedure that requires patience and emotional resilience. It offers particular benefits to individuals with blocked fallopian tubes or diminished ovarian reserve, as well as to couples grappling with male infertility. While IVF is not without risks and potential side effects, it has paved the way for countless success stories, enabling many individuals to fulfill their dreams of parenthood. This groundbreaking technique has not only provided the means to achieve a healthy pregnancy but has also given hope to those facing seemingly insurmountable fertility

challenges. The advancements in IVF technology continue to push the boundaries of what is possible, offering new possibilities and renewed optimism to couples worldwide.

Key Market Drivers

Growing Success Rate of IVF Technology

The growing success rate of in-vitro fertilization (IVF) technology is fueling a significant increase in the demand for IVF procedures in India. IVF has revolutionized fertility treatment and has become a beacon of hope for couples struggling with infertility. As the effectiveness and safety of IVF procedures have improved over the years, more couples in India are turning to this assisted reproductive technology to fulfill their dreams of parenthood.

One of the key drivers of the rising demand for IVF in India is the increased awareness and accessibility of these procedures. Couples are now better informed about the options available to them, thanks to advancements in medical communication and patient education. This awareness has led to a surge in couples seeking IVF treatments, especially among those who previously may have been unaware of or hesitant to explore this option. Moreover, advancements in IVF techniques, including improved laboratory protocols, better cryopreservation methods, and genetic screening technologies, have significantly enhanced the success rates of IVF. Couples are more likely to achieve successful pregnancies, increasing their confidence in the procedure and thus driving up demand.

Additionally, societal changes, such as delayed marriages and childbearing, have led to an increased prevalence of age-related infertility, making IVF a crucial option for older couples who may have difficulty conceiving naturally. As the average age of first-time parents in India continues to rise, the demand for IVF is likely to grow further. The success stories of couples who have successfully conceived through IVF have also played a role in destigmatizing infertility treatments and encouraging more individuals to seek help. As IVF continues to offer hope and a higher probability of success, its demand is expected to rise, and the technology's continued advancement will likely contribute to even more positive outcomes for couples facing infertility in India.

Increasing Awareness about IVF Technology

The increasing awareness about in-vitro fertilization (IVF) technology is undeniably

driving a substantial increase in the demand for IVF procedures in India. IVF, a revolutionary assisted reproductive technology, has emerged as a beacon of hope for couples grappling with infertility. As awareness about IVF and its success stories continues to spread, more couples across India are exploring this option to fulfill their dreams of parenthood. The internet, social media, and television have played pivotal roles in educating people about IVF, its benefits, and the success stories of couples who have successfully conceived through these procedures. This heightened awareness has empowered couples to proactively seek IVF treatments, particularly those who may have been previously uninformed or hesitant.

Moreover, healthcare providers and fertility clinics are also contributing to increased awareness by conducting awareness campaigns, seminars, and workshops, thereby demystifying the IVF process and addressing misconceptions. This proactive engagement by medical professionals is fostering greater trust in IVF as a viable solution for infertility. Changing societal norms, including delayed marriages and childbearing, have resulted in a higher incidence of age-related infertility. Couples, especially older ones, are now more informed about the potential challenges of conceiving naturally at an older age and are thus turning to IVF as a viable option.

As the discourse surrounding infertility and IVF becomes more open and supportive, the demand for IVF in India is expected to continue its upward trajectory. The increasing awareness about IVF is not only empowering couples to seek fertility treatment but also contributing to a broader acceptance of infertility as a medical condition, further reducing the stigma associated with it. In sum, the growing awareness about IVF is positively impacting the demand for these procedures and offering hope to countless couples facing infertility challenges in India.

Delayed Onset of Pregnancies

The delayed onset of pregnancies in India is a significant factor contributing to the increasing demand for in-vitro fertilization (IVF) procedures. Changing societal norms, career aspirations, and lifestyle choices have led many couples to delay their plans for starting a family. As a result, a growing number of individuals and couples in India are experiencing age-related fertility challenges, making IVF an essential option for achieving parenthood. As individuals invest more time in their education and careers, they tend to postpone starting a family until later in life. However, fertility declines with age, particularly for women, as ovarian reserve decreases and the likelihood of reproductive issues increases.

Additionally, changing societal expectations have led to delayed marriages, further contributing to delayed pregnancies. Couples are now choosing to marry at older ages, which naturally leads to a delay in their plans for parenthood. IVF has emerged as a vital solution for couples facing age-related fertility challenges. It offers the possibility of conceiving even when natural conception becomes more difficult due to age-related factors. IVF's success rates have improved significantly over the years, making it a viable and increasingly preferred option for couples seeking to overcome age-related infertility.

Furthermore, the increasing awareness about IVF and its success stories has encouraged more individuals and couples to explore this assisted reproductive technology. As the understanding of IVF grows, so does the willingness to consider it as a means to achieve the dream of parenthood, despite the challenges posed by delayed pregnancies. The delayed onset of pregnancies in India, driven by various societal and lifestyle factors, is a significant driver of the rising demand for IVF procedures. IVF provides hope to couples facing age-related fertility issues, offering a pathway to parenthood that aligns with their life goals and aspirations.

Increasing Cases of Infertility

The increasing cases of infertility in India are undeniably driving a significant surge in the demand for in-vitro fertilization (IVF) procedures. Infertility, which affects a substantial portion of the population, has become a pressing concern in the country. As more couples and individuals grapple with fertility challenges, IVF has emerged as a crucial and increasingly popular option for achieving parenthood.

Several factors contribute to the rising cases of infertility in India, including changing lifestyles, environmental factors, stress, and delayed pregnancies. Lifestyle factors such as obesity, smoking, and poor diet can have adverse effects on fertility, while environmental factors like pollution can also impact reproductive health. These challenges have led to an increase in the incidence of infertility. IVF has gained prominence as a highly effective solution for overcoming infertility. It offers hope to individuals and couples who may have previously believed parenthood was out of reach. The advanced techniques and technologies used in IVF procedures, including intracytoplasmic sperm injection (ICSI) and preimplantation genetic testing (PGT), have significantly improved success rates, making IVF a viable option for a broader range of infertility cases.

Moreover, the increasing awareness and accessibility of IVF have played a pivotal role

in the growing demand for these procedures. Information dissemination through the internet, social media, and medical professionals has empowered couples to explore IVF as a potential solution. As a result, individuals and couples are proactively seeking IVF treatments, including those in remote or underserved areas of India. As infertility cases continue to rise, the demand for IVF is expected to grow even further, highlighting the importance of accessible and quality reproductive healthcare services in India. IVF has become a beacon of hope for individuals and couples longing for the joys of parenthood amid the increasing prevalence of infertility.

Key Market Challenges

Complications Associated with In Vitro Fertilization

The demand for in-vitro fertilization (IVF) in India, while significant, is impacted by concerns related to complications associated with the procedure, and this has led to certain challenges in its widespread adoption. IVF, while a highly effective method for treating infertility, is not without risks, and these concerns have contributed to a more cautious approach among potential patients. Multiple pregnancies, such as twins or triplets, are more likely with IVF due to the transfer of multiple embryos to increase the chances of success. While some couples may desire twins, multiple pregnancies carry a higher risk of complications, including preterm birth and low birth weight, which can impact both the mother and babies. This concern has led to careful consideration and discussion between patients and healthcare providers when deciding the number of embryos to transfer.

Ovarian hyperstimulation syndrome (OHSS) is another complication associated with IVF that raises concerns among prospective patients. OHSS can result from the hormonal stimulation used in IVF and can lead to symptoms ranging from mild discomfort to severe complications, including abdominal pain, fluid retention, and blood clotting issues. The risk of OHSS is a point of concern for some couples contemplating IVF. Additionally, the cost of IVF treatments, along with concerns about its emotional and physical toll on patients, can deter some individuals from pursuing this option. The emotional strain of multiple failed attempts and the invasive nature of the procedure may lead to apprehension among those considering IVF.

To address these concerns and increase the demand for IVF in India, it is essential for healthcare providers and fertility clinics to prioritize patient education, counseling, and risk mitigation strategies. By providing comprehensive information about the procedure, managing expectations, and emphasizing personalized care, the fertility industry can

help individuals make informed decisions about IVF while mitigating concerns about potential complications.

Social Stigma, Ethical, and Legal Issues Associated with In Vitro Fertilization

Social stigma, ethical concerns, and legal issues associated with in-vitro fertilization (IVF) have had a notable impact on the demand for IVF in India. While IVF is a highly effective fertility treatment, these factors have contributed to a certain degree of hesitancy and decreased adoption of the procedure in the country. Social stigma remains a significant barrier to IVF utilization in India. Infertility can be viewed as a taboo subject in many Indian communities, and individuals and couples facing fertility challenges may experience societal pressure and discrimination. This stigma can deter people from seeking IVF treatment due to concerns about social judgment and ostracization.

Ethical dilemmas surrounding IVF procedures also influence the demand. Questions related to embryo selection, disposal, and the possibility of multiple pregnancies raise complex moral and ethical considerations. Some individuals may be hesitant to pursue IVF due to concerns about these ethical issues and the perceived moral implications of the treatment. Legal uncertainties and gaps in IVF regulations in India have further compounded the challenges. While there are guidelines and recommendations in place, comprehensive and enforceable legislation is lacking. This legal ambiguity can create confusion and anxiety for both patients and healthcare providers, leading to a decreased demand for IVF services.

Key Market Trends

Increasing Government Support

The Indian government's proactive initiatives to provide better healthcare facilities and streamline regulations for IVF (in vitro fertilization) are playing a crucial role in driving the significant growth of this market. By focusing on improving access to quality healthcare services and creating a favorable environment for assisted reproductive technologies, the government is empowering individuals and couples to overcome fertility challenges and fulfill their dreams of parenthood. Moreover, the government's efforts include the establishment of specialized fertility centers equipped with state-of-the-art technology and highly skilled medical professionals. These centers offer a wide range of fertility treatments and services, including advanced reproductive procedures, genetic testing, and personalized care.

Additionally, the government is actively investing in research and development in the field of reproductive healthcare, encouraging collaborations between academia, industry, and healthcare providers. This collaborative approach aims to push the boundaries of scientific knowledge and innovation, leading to breakthroughs in assisted reproductive technologies and improving success rates for couples undergoing fertility treatments. Overall, this supportive ecosystem created by the Indian government is not only fostering innovation but also attracting investments from both domestic and international players. The growth of the IVF market in India is not only transforming the lives of individuals and couples struggling with fertility issues but also contributing to the advancement of reproductive healthcare as a whole in the country.

Emergence of Fertility Tourism

India is increasingly emerging as a preferred destination for fertility treatments, attracting individuals from around the world. This is primarily due to its exceptional medical facilities that boast state-of-the-art technology and equipment. With cutting-edge advancements in reproductive medicine, India offers a wide range of fertility treatments, including in vitro fertilization (IVF), intracytoplasmic sperm injection (ICSI), and egg donation.

Moreover, the country is home to highly skilled and experienced fertility professionals who provide personalized and compassionate care. These experts understand the emotional journey of individuals and couples struggling with infertility, offering support and guidance throughout the entire process. With their expertise and dedication, they strive to fulfill the dreams of parenthood for every patient. Not only does India offer top-notch medical expertise, but it also provides cost-effective solutions, making fertility treatments more accessible to a wider range of individuals. The affordable cost of treatments, combined with the high success rates, has made India a favorable choice for those seeking fertility solutions. Furthermore, the warm and welcoming hospitality of the country adds to the overall experience, creating a comfortable and stress-free environment for patients.

As a result, there has been a significant rise in fertility tourism, with people choosing India as their destination to embark on their journey towards parenthood. The combination of world-class medical facilities, skilled professionals, cost-effectiveness, and compassionate care has made India a global hub for fertility treatments. Individuals from different corners of the world are now finding hope and realizing their dreams of starting a family in the welcoming embrace of India. Whether it's the advanced

technology, the expertise of the fertility professionals, or the inclusive and supportive environment, India has become a beacon of hope for individuals and couples seeking fertility treatments. With its comprehensive range of services and unwavering commitment to patient care, India continues to pave the way for a brighter future in reproductive healthcare.

Segmental Insights

Donor Insights

Based on donor, in the year 2022, the segment of fresh non-donor IVF cycles emerged as the dominant force in the India In-vitro Fertilization Market. This can be attributed to the remarkable success rate associated with fresh non-donor IVF cycles, which have shown consistent positive outcomes in helping couples achieve their dream of parenthood. With their high success rate and the ease of implantation they offer, fresh non-donor IVF cycles have become the preferred choice for both patients and medical professionals. The effectiveness and efficiency of this approach have not only provided hope and happiness to countless individuals and families but have also significantly advanced the field of fertility treatment. By continuously improving and refining the techniques involved, fresh non-donor IVF cycles have set a new standard for reproductive medicine, ensuring a brighter future for those seeking assisted reproductive technologies.

End User Insights

Based on end user, in 2022, the fertility clinics segment emerged as the dominant force in the market, capturing the largest market share. This remarkable achievement can be primarily attributed to the unprecedented global expansion of fertility clinics, which have witnessed substantial growth in recent years. The increasing awareness and acceptance of assisted reproductive technologies, particularly in vitro fertilization (IVF), have played a pivotal role in shaping consumers' decisions to pursue IVF treatment at these clinics. The availability of advanced reproductive technologies, such as preimplantation genetic testing and embryo cryopreservation, has further enhanced the appeal of fertility clinics. These cutting-edge techniques offer improved success rates and higher chances of positive outcomes, instilling confidence in individuals and couples seeking fertility treatments. With the continuous advancements in medical research and technology, fertility clinics have become a beacon of hope for those longing to start or expand their families.

As a result, the demand for IVF services has been steadily increasing, propelling the growth of fertility clinics worldwide. The comprehensive range of services offered, including personalized treatment plans, state-of-the-art laboratory facilities, and experienced medical professionals, further contribute to the rising popularity of these clinics. With their unwavering commitment to patient care and success, fertility clinics continue to revolutionize the field of reproductive medicine and provide new opportunities for individuals and couples striving to fulfill their dreams of parenthood.

Regional Insights

The western region of India, particularly Maharashtra and Gujarat, is expected to have a strong and influential presence in the Indian In-vitro Fertilization (IVF) market. This dominance can be attributed to a combination of factors that contribute to the region's remarkable growth in this field. One of the key factors is the high per capita income in Maharashtra and Gujarat, which enables a significant portion of the population to afford IVF procedures. This financial capability, coupled with increasing awareness about the benefits and success rates of IVF treatments, has led to a surge in demand for such procedures in the region.

Moreover, the western region is home to several reputable fertility clinics that have established a strong reputation for providing high-quality IVF services. These clinics offer state-of-the-art treatment facilities, advanced medical technologies, and experienced fertility specialists who are dedicated to helping couples achieve their dream of parenthood. Mumbai, the bustling metropolis in Maharashtra, stands out as a hub for IVF centers, with a significant number of clinics offering comprehensive and personalized treatment options. The combination of these factors has created a favorable environment for the growth of the Indian IVF market in the western region. As more individuals and couples turn to IVF as a viable solution for their fertility challenges, the market is poised for further expansion and advancements in the years to come.

Key Market Players

Merck India

ORIGIO India Pvt Ltd.

IMV India Pvt. Ltd.

Thermo Fisher Scientific India Pvt. Ltd.

Travancore Trade Links

Cook Medical India

Morpheus Life Sciences Pvt. Ltd.

Max Healthcare Institute Limited

Olympus Medical Systems India Pvt Ltd.

FUJIFILM India Pvt Ltd.

Report Scope:

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

India In-vitro Fertilization Market, By Technique:

ICSI IVF

Non-ICSI/ Traditional IVF

India In-vitro Fertilization Market, By Product:

IVF Culture Media

ICSI Machine

IVF Incubators

Cryosystem

Others

India In-vitro Fertilization Market, By Donor:

Fresh Non-donor

Frozen Non-donor

Fresh Donor

Frozen Donor

India In-vitro Fertilization Market, By Fertility:

Male

Female

India In-vitro Fertilization Market, By Embryo:

Fresh Embryo

Frozen-thawed Embryo

India In-vitro Fertilization Market, By End User:

Fertility Clinics

Hospitals

Others

India In-vitro Fertilization Market, By Region:

North

South

West

East

Competitive Landscape

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

Available Customizations:

India 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).

Contents

1. PRODUCT OVERVIEW

- 1.1. Market Definition
- 1.2. Scope of the Market
 - 1.2.1. Markets Covered
 - 1.2.2. Years Considered for Study
 - 1.2.3. Key Market Segmentations

2. RESEARCH METHODOLOGY

- 2.1. Objective of the Study
- 2.2. Baseline Methodology
- 2.3. Key Industry Partners
- 2.4. Major Association and Secondary Sources
- 2.5. Forecasting Methodology
- 2.6. Data Triangulation & Validations
- 2.7. Assumptions and Limitations

3. EXECUTIVE SUMMARY

- 3.1. Overview of the Market
- 3.2. Overview of Key Market Segmentations
- 3.3. Overview of Key Market Players
- 3.4. Overview of Key Regions/Countries
- 3.5. Overview of Market Drivers, Challenges, Trends

4. VOICE OF CUSTOMER

5. INDIA IN-VITRO FERTILIZATION MARKET OUTLOOK

- 5.1. Market Size & Forecast
 - 5.1.1. By Value
- 5.2. Market Share & Forecast
 - 5.2.1. By Technique (ICSI IVF, Non-ICSI/ Traditional IVF)
 - 5.2.2. By Product (IVF Culture Media, ICSI Machine, IVF Incubators, Cryosystem, Others)
 - 5.2.3. By Donor (Fresh Non-donor, Frozen Non-donor, Fresh Donor, Frozen Donor)

- 5.2.4. By Infertility (Male, Female)
 - 5.2.5. By Embryo (Fresh Embryo, Frozen-thawed Embryo)
 - 5.2.6. By End User (Fertility Clinics, Hospitals, Others)
 - 5.2.7. By Region
 - 5.2.7.1. By State (Top 3 States)
 - 5.2.8. By Company (2022)
- 5.3. Market Map

6. NORTH INDIA IN-VITRO FERTILIZATION MARKET OUTLOOK

- 6.1. Market Size & Forecast
 - 6.1.1. By Value
- 6.2. Market Share & Forecast
 - 6.2.1. By Technique
 - 6.2.2. By Product
 - 6.2.3. By Donor
 - 6.2.4. By Infertility
 - 6.2.5. By Embryo
 - 6.2.6. By End User

7. WEST INDIA IN-VITRO FERTILIZATION MARKET OUTLOOK

- 7.1. Market Size & Forecast
 - 7.1.1. By Value
- 7.2. Market Share & Forecast
 - 7.2.1. By Technique
 - 7.2.2. By Product
 - 7.2.3. By Donor
 - 7.2.4. By Infertility
 - 7.2.5. By Embryo
 - 7.2.6. By End User

8. SOUTH INDIA IN-VITRO FERTILIZATION MARKET OUTLOOK

- 8.1. Market Size & Forecast
 - 8.1.1. By Value
- 8.2. Market Share & Forecast
 - 8.2.1. By Technique
 - 8.2.2. By Product

- 8.2.3. By Donor
- 8.2.4. By Infertility
- 8.2.5. By Embryo
- 8.2.6. By End User

9. EAST INDIA IN-VITRO FERTILIZATION MARKET OUTLOOK

- 9.1. Market Size & Forecast
 - 9.1.1. By Value
- 9.2. Market Share & Forecast
 - 9.2.1. By Technique
 - 9.2.2. By Product
 - 9.2.3. By Donor
 - 9.2.4. By Infertility
 - 9.2.5. By Embryo
 - 9.2.6. By End User

10. MARKET DYNAMICS

- 10.1. Drivers
- 10.2. Challenges

11. MARKET TRENDS & DEVELOPMENTS

- 11.1. Recent Development
- 11.2. Mergers & Acquisitions
- 11.3. Product Launches

12. INDIA IN-VITRO FERTILIZATION MARKET: SWOT ANALYSIS

13. PORTER'S FIVE FORCES ANALYSIS

- 13.1. Competition in the Industry
- 13.2. Potential of New Entrants
- 13.3. Power of Suppliers
- 13.4. Power of Customers
- 13.5. Threat of Substitute Products

14. COMPETITIVE LANDSCAPE

- 14.1. Merck India
 - 14.1.1. Business Overview
 - 14.1.2. Service Offerings
 - 14.1.3. Recent Developments
 - 14.1.4. Key Personnel
 - 14.1.5. SWOT Analysis
- 14.2. ORIGIO India Pvt Ltd.
 - 14.2.1. Business Overview
 - 14.2.2. Service Offerings
 - 14.2.3. Recent Developments
 - 14.2.4. Key Personnel
 - 14.2.5. SWOT Analysis
- 14.3. IMV India Pvt. Ltd.
 - 14.3.1. Business Overview
 - 14.3.2. Service Offerings
 - 14.3.3. Recent Developments
 - 14.3.4. Key Personnel
 - 14.3.5. SWOT Analysis
- 14.4. Thermo Fisher Scientific India Pvt. Ltd.
 - 14.4.1. Business Overview
 - 14.4.2. Service Offerings
 - 14.4.3. Recent Developments
 - 14.4.4. Key Personnel
 - 14.4.5. SWOT Analysis
- 14.5. Travancore Trade Links
 - 14.5.1. Business Overview
 - 14.5.2. Service Offerings
 - 14.5.3. Recent Developments
 - 14.5.4. Key Personnel
 - 14.5.5. SWOT Analysis
- 14.6. Cook Medical India
 - 14.6.1. Business Overview
 - 14.6.2. Service Offerings
 - 14.6.3. Recent Developments
 - 14.6.4. Key Personnel
 - 14.6.5. SWOT Analysis
- 14.7. Morpheus Life Sciences Pvt. Ltd.
 - 14.7.1. Business Overview

- 14.7.2. Service Offerings
- 14.7.3. Recent Developments
- 14.7.4. Key Personnel
- 14.7.5. SWOT Analysis
- 14.8. Max Healthcare Institute Limited
 - 14.8.1. Business Overview
 - 14.8.2. Service Offerings
 - 14.8.3. Recent Developments
 - 14.8.4. Key Personnel
 - 14.8.5. SWOT Analysis
- 14.9. Olympus Medical Systems India Pvt Ltd.
 - 14.9.1. Business Overview
 - 14.9.2. Service Offerings
 - 14.9.3. Recent Developments
 - 14.9.4. Key Personnel
 - 14.9.5. SWOT Analysis
- 14.10. FUJIFILM India Pvt Ltd.
 - 14.10.1. Business Overview
 - 14.10.2. Service Offerings
 - 14.10.3. Recent Developments
 - 14.10.4. Key Personnel
 - 14.10.5. SWOT Analysis

15. STRATEGIC RECOMMENDATIONS

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