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Assisted Reproductive Technology Market: Current Analysis and Forecast (2025-2033)

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Abstracts

Assisted Reproductive Technology (ART) encompasses all technologies that modify gametes outside the body. Infertile women are typically treated for superovulation, which occasionally entails patient risk. The rate of abortion and congenital abnormalities is slightly greater than the general population, and this is correlated with the female partner's age rather than the procedure itself. The use of assisted reproductive technologies has not only allowed for the creation of families but also opened up new possibilities for struggling infertile couples. Any device that manipulates gametes outside of the body is referred to as assisted reproductive technology (ART). It excludes procedures like intrauterine insemination (IUI), in which only spermatozoa are altered. The various procedures of ART include: In-vitro fertilization and embryo transfer (IVF &ET), Gamete Intrafallopian transfer (GIFT), Pronucleate or Zygote intra-fallopian transfer (PROT, ZIFT), Intracytoplasmic sperm injection (ICSI), Round nuclei injection (ROSNI) or spermatid injection, Assisted hatching, etc.

The Assisted Reproductive Technology Market is expected to grow with a significant CAGR of 9.56% during the forecast period (2025- 2033F). The rising prevalence of infertility across the population, technological developments in assisted reproductive technology, demographic shifts toward acceptance of ART, and increased awareness of ART are all contributing factors to the assisted reproductive technology market. Further inability of parents to conceive their child, increased rate of diseases such as greater body mass index, chronic hypertension, diabetes, and thyroid problems, are projected to expedite the exponential expansion worldwide. Additionally, ART success rates and higher disposable income in developing nations are some of the factors that are anticipated to propel industry expansion throughout the forecast period. The rising rates of infertility as a result of shifting lifestyles, increased public stress, and growing government programs to promote fertility services are driving the market growth.

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Sexually transmitted infections (STIs), rising cigarette smoking rates, obesity, endometriosis, PCOS, POC, and other conditions are further factors contributing to this market's significant rise. Additionally, the development of sophisticated assisted reproductive technologies, including frozen embryo transfer (FET), GIFT, and intracytoplasmic sperm injection (ICSI), backed by promising clinical outcomes, is driving the expansion of the assisted reproductive technology market.

Based on product, the market is segmented into instruments, accessory & disposable, and reagents & media. Among these, the instrument assisted reproductive technology market has the largest share in the assisted reproductive technology market because of its leadership in fertility treatment and the ongoing evolution of reproductive technology. Instruments such as Incubators, micromanipulators, imaging devices, and cryopreservation equipment are required for processes such as freezing sperm or eggs, embryo cultivation, and in vitro fertilization (IVF). Higher accuracy, automation, and efficiency in ART labs are also driving the usage of advanced instruments. Reproductive medicine research, ART success rates, and the growth in fertility clinics are other factors driving this market. Their market position is becoming dominant as the demand for high-quality instruments continues to rise, as ART procedures become more complex and common.

Based on technology, the market is segmented into in-vitro fertilization (IVF), artificial insemination, and others. Among these, the largest portion of global revenue in 2024 came from the IVF category and has become the most successful method of treating infertility, addressing many factors such as older mother age, male factor, and unexplained infertility because of its high success rates, widespread use, and continuous technological advancements. Due to its great success, time-lapse imaging, embryo freezing, and preimplantation genetic screening are increasingly being used as the preferred ART method. Increased awareness of fertility treatment, increased infertility rates, and delayed conception are all contributing causes to the need for IVF worldwide. The development of fertility clinics worldwide, government support for ART therapy, and the rise in medical tourism are other factors driving the market leadership. According to the National Library of Medicine, in 2021, a total of 601 fertility clinics in Japan performed treatments of assisted reproductive technology (ART). Thus, the aforementioned factors are expected to augment the segmental growth.

Based on the end-user, the market is segmented into hospitals, fertility clinics,

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and others. In 2024, the fertility clinics held the dominant share of the assisted reproductive technology market. The segment is anticipated to continue growing at the quickest rate, maintaining its top spot in the industry for the duration of the forecast. The requirement for a specialist location to perform ART and the increase in infertility cases are the reasons for the high share and quick growth. As fertility clinics provide customized options such as genetic testing, storing embryos, and donating eggs and sperm to people in need of reproductive aid, it is catalyzing the assisted reproductive technology market. For instance, according to the National Institutes of Health, in 2023, India is witnessing a surge in IVF clinics and chains, with an estimated 2500 clinics functional across India and the second largest number of cycles of treatment after the United States, which is fueled by the growing private equity investors.

For a better understanding of the market, the growth of the assisted reproductive technology market is analyzed based on their worldwide demand in regions such as North America (U.S., Canada, and the Rest of North America), Europe (Germany, France, U.K., Spain, Italy, Rest of Europe), Asia-Pacific (China, Japan, India, Rest of Asia-Pacific), Rest of World. It is anticipated that growing ART research and technological developments will accelerate the market's expansion in Asia Pacific owing to rising infertility rates, greater awareness of fertility treatments, and improved healthcare infrastructure. Asia-Pacific is expected to develop at the fastest rate in the assisted reproductive technology (ART) market during the projected years, driven by delayed childbirth, changes in lifestyle, and stress-related infertility. For instance, according to the Japan Society of Obstetrics and Gynecology, in 2021, the number of children born through in vitro fertilization as part of infertility treatment increased by 9,416 from the previous year to a record high of 69,797 in Japan. Further, the market is also inflating due to government regulations supporting infertility treatment, an increase in the number of fertility clinics, and advancements in reproductive technologies. The region's market is expanding due to the affordability of ART operations in comparison to Western countries and rising medical tourism. As per the World Bank 2024, 74 women die per 100,000 live births due to pregnancy-related causes in East Asia & Pacific. According to Economist Impact 2024, the fertility rates of many countries in the Asia Pacific region (APAC) have been drastically declining over the past 70 years. This has had an impact not only on the population size of these countries but also on the structure of the population. South Korea has the lowest total fertility rate (TFR) in the world at 0.8, well below the replacement rate of 2.1, and Singapore and Japan are not much higher, at 1.1 and 1.3, respectively.

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Some of the major players operating in the market include Thermo Fisher Scientific, Inc., Merck KGaA (E. Merck KG), and Vitrolife AB. (Vitrolife Group), FUJIFILM Irvine Scientific. (FUJIFILM Holdings Corporation), Hamilton Thorne Ltd., CooperSurgical, Inc. (The Cooper Companies, Inc.), Kitazato Corporation, NidaCon International AB., Gynotec, and Esco Medical.

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