# U.S. Fertility Clinics & Infertility Services: An Industry Analysis  
(October 2013)

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* Industry evolution – when clinics first appeared  
* Market demand and potential: Number and percent of women of childbearing age infertile, increase in IVF procedures from 1987-2011, reasons for continued growth, past estimates of industry size  
* Insurance coverage: typical fees and client affordability, state mandated coverage, financing  
* Pending legislation: The Family Act, Personhood bills.  
* Causes of infertility: discussion of main reasons for infertility in men and women, treatment methods (HSG procedures, lap and dye procedures – description, cost, estimated number of procedures). Tubal reversal surgeries (description of, success rates, costs, percent of women having procedure, estimated number of surgeries).  
* IVF procedures: discussion of procedure, cost. GIFT procedures: discussion of procedure, cost, number of procedures.  
* Ethical guidelines and government regulation of clinics: status report.

**Customer Demographics**  ($150)

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* Recent birth rate/birth control trends: analysis of why birth control rises during recession and birth rates fall, effect of last recession  
* Delayer boom: more educated women have children later in life  
* IVF tourism increases for European couples due to U.S. economy and progressive laws  
* Health status: percent of women age 18-44 reporting receiving infertility services (by race, age, type service)  
* Fertility of American women: 2008 Report (U.S. Census Bureau – highlights of the report) (birth rates and fertility rates by race, education, state, income), level of childlessness by age, race  
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* Current fertility rates
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* Marital status and cohabitation
* Citizenship status, race and Hispanic origin
* Educational attainment
* Birth rates: data for 2011 – report highlights regarding number of births, total births in the United States, crude birth rate, general fertility rate

Tables:
- Women aged 18-44 who have ever received infertility services, by race/ethnicity
- Women aged 18-44 who have had an infertility related medical appointed in the past year, by age
- Number of married women 15-44 years of age and percentage who have had a sterilizing operation by type of operation and percentage whose husband has had a vasectomy, by selected characteristics: United States
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* Marketdata estimate of mkt. size in 1999, by diagnostic procedure, IVF, drugs, surgeries
* Harvard Business School estimate for 2004
* Discussion of no. of IVF clinics 1985-2011, avg. revenues, value of this segment
* 2018 Forecast: Factors affecting current and future industry growth: IVF tourism, economic recovery, public policy, improved success rates, gay/lesbian use of IVF, etc.

*Status of the European Market*, report of ESHRE, IVF volume, percent distribution of IVF vs. ICSI (1997-2009), which nations infertile couples come from, reasons, reimbursement ESHRE headquarters address.

Tables:
- Size of fertility services industry – 1999: diagnostic & therapeutic procedures (no. performed, avg. cost, estd. $ value: office consultations, semen analysis, hormone evaluations, tubal reversals, IVF & GIFT procedures, fertility drugs, donor eggs, donor sperm, surrogacies)
- No. of IVF procedures performed: 1998-2011 (CDC data)
- Size of fertility services industry – 20012 vs. 2008: diagnostic & therapeutic procedures (no. performed, avg. cost, estd. $ value) – breakdowns as above
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* Summary of the U.S. & global fertility drugs market: estimated size, key competitors (Organon, Merck Serono, Ferring)
* Outlook and sales results from Merck’s 1995-2012 annual reports for North America versus rest of world, outlook for Gonal-f and Pergoveris
* Estimated market share for Merck Serono, $ sales
* Discussion of increase in illicit drug market developing between buyers and sellers

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Sperm Banks
* Summary and discussion: number of U.S. sperm banks, typical fees, main activities
* How the process works: requirements and screening of sperm donors, who typical donors are, fees, contracts
* Estimated value of the market: 2004 – 2018F
* Market trends – why market is flat, gray market sperm
* Major competitor Profiles: Cryos International Sperm Bank (Denmark), California Cryobank – typical procedures and requirements of donors, findings of phone interview

Egg Donation
* Discussion of egg donors, fees, who they are, differentiated pricing structure, estimated market Value: why this is a strong growth market, foreign demand, market size: 2004-2018 Forecast.

Surrogacy Programs: Discussion of the need for it, mkt. size, fees, etc.

Findings of 2011 vs. 2007 CDC ART Surveys on Assisted Reproductive Technology - Success Rates ($100)  87-99

* Findings of 2011 survey: success rates, by age of woman, fresh & frozen embryos from nondonor eggs, donor eggs, percent of clinics offering services by type.
* Discussion/analysis of: type ART procedure used, pregnancy success rates, ART cycles using frozen embryos, ART cycles using donor eggs, ART cycles using nondonor eggs and embryos, success rates by women’s age

Tables and analyses of 2011 report: National Summary
* Total no. of ART procedures performed, % by type.
* No. of infants born through ART
* Percent multiple birth deliveries
* Percent of ART transfers resulting in a pregnancy.

Text, analyses & discussion covering these topics: (2001-2010 long-term trend data)
- Is the use of ART increasing? Is the use of ICSI increasing?
- Have there been changes in the type of ART cycles performed among women who used fresh or frozen nondonor eggs or embryos?
- Improvements in % of transfers resulting in live/singleton births among women using fresh/frozen eggs (by age group)
- Has the no. of embryos transferred in fresh non-donor cycles changed?
- Has the no. of embryos transferred in each ART cycle changed for women under 35?
- Have there been improvements in ART success rates by no. of embryos transferred?
- Has the % of multiple-infant live births changed?
- Has the % of singletons, twins and triplets or more changed for ART cycles using fresh non-donor eggs or embryos?
**Fertility Clinics Business Operating Ratios**  ($50)  
Results of custom Marketdata survey  (June-July 2009)

- Number of new patient visits per year
- Average cost of new patient consult
- Average cost of a semen analysis
- Average cost of a hormone evaluation
- Average cost of a HSG
- Average cost of a tubal reversal surgery

**Major Competitor Profiles**  ($150)

Summary: discussion of consolidation, how larger clinics are capturing greater share of the market

Tables:
- Ranking of top 21 IVF clinics, by. no. of cycles performed and estd. revenues per clinic in 2011

Descriptions of activities, specialties, mission, 2006-2008 revenues if available, address, for:
- Resolve
- Allan Guttmacher Institute
- Genetics and IVF Institute
- IntegraMed America, Inc.

**Industry Reference Directory**

* List of adoption and fertility services industry trade groups, associations, surveys, consultants, and other sources.