

**The COVID-19 Pandemic
and a Rising Focus on
Women's Untapped
Healthcare Needs are
Transforming the Global
Femtech Solutions
Industry**

**The Healthcare Needs of the
XXXX Billion Global Female
Population Creates New
Growth Opportunities**

**Global Transformational Health
Research Team at Frost & Sullivan**

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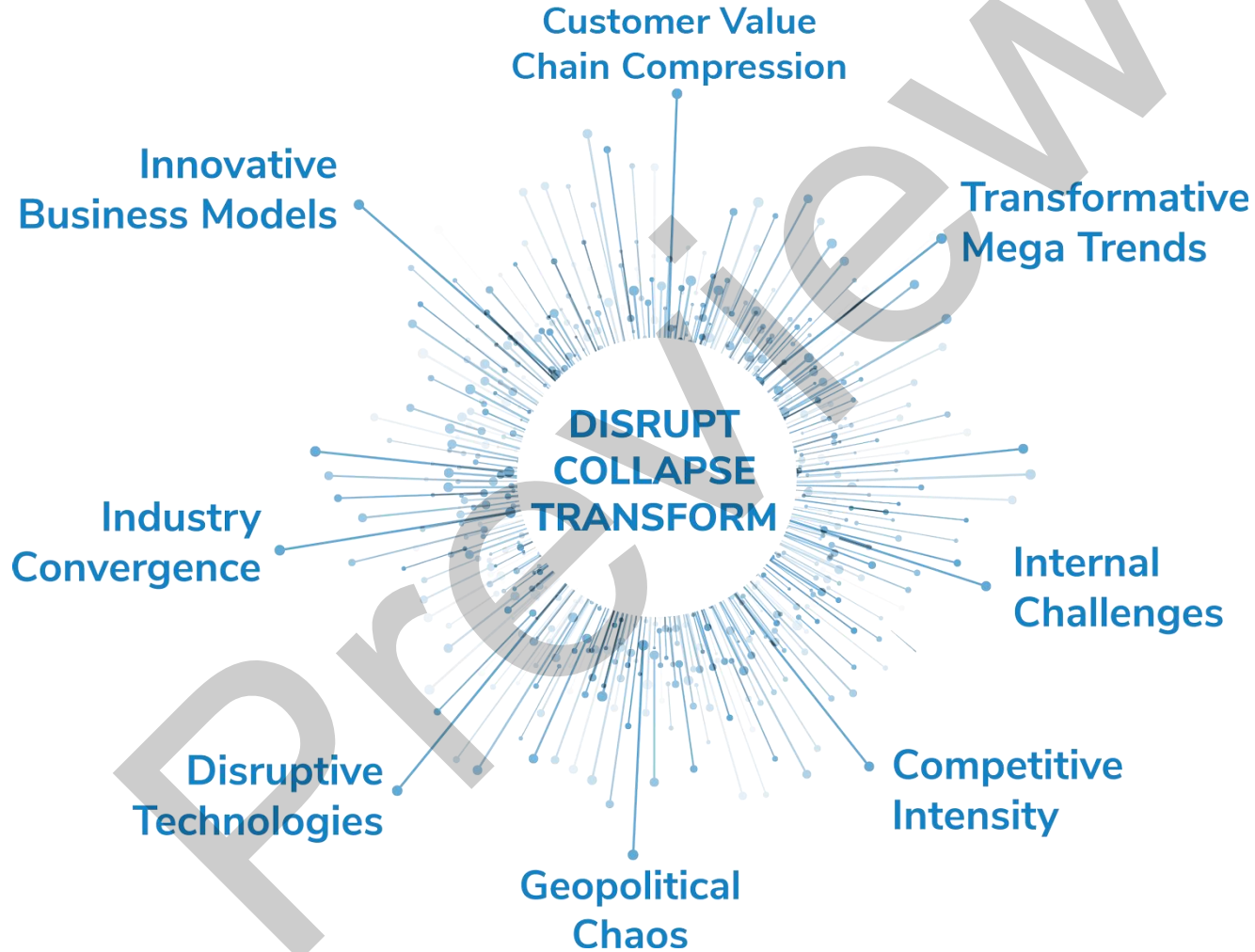
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Strategic Imperatives

Why is it Increasingly Difficult to Grow?

The Strategic Imperative 8™: Factors Creating Pressure on Growth



Source: Frost & Sullivan

The Strategic Imperative 8™

Innovative Business Models

A new revenue model that defines how a company creates and capitalizes economic value, typically impacting its value proposition, product offering, operational strategies, and brand positioning.

Customer Value Chain Compression

Customer value chain compression as a result of advanced technologies, internet platforms, and other direct-to-consumer models that enables reduction in friction and the number of steps in customer journeys.

Transformative Mega Trends

Global forces that define the future world with their far-reaching impact on business, societies, economies, cultures, and personal lives.

Internal Challenges

The internal organizational behaviors that prevent a company from making required changes.

Competitive Intensity

A new wave of competition from start-ups and digital business models that challenge the standing conventions of the past, compelling established industries to re-think their competitive stance.

Geopolitical Chaos

Chaos and disorder arising from political discord, natural calamities, pandemics, and social unrest that impact global trade, collaboration, and business security.

Disruptive Technologies

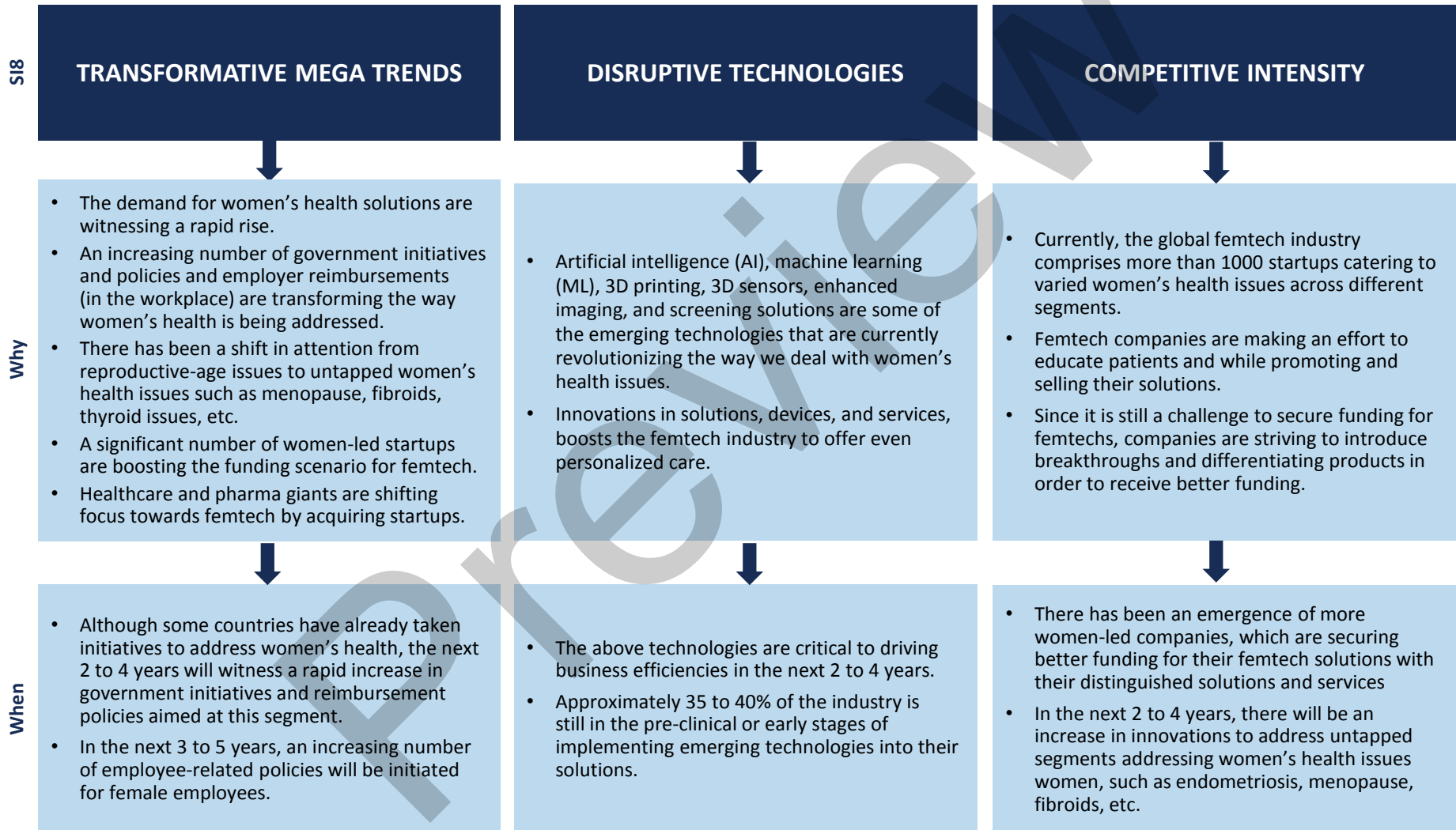
New, disruptive technologies that are displacing the old, and significantly altering the way consumers, industries, or businesses operate.

Industry Convergence

Collaboration between previously disparate industries to deliver on whitespace cross-industry growth opportunities.

Source: Frost & Sullivan

The Impact of the Top Three Strategic Imperatives on Global Femtech Solutions Industry

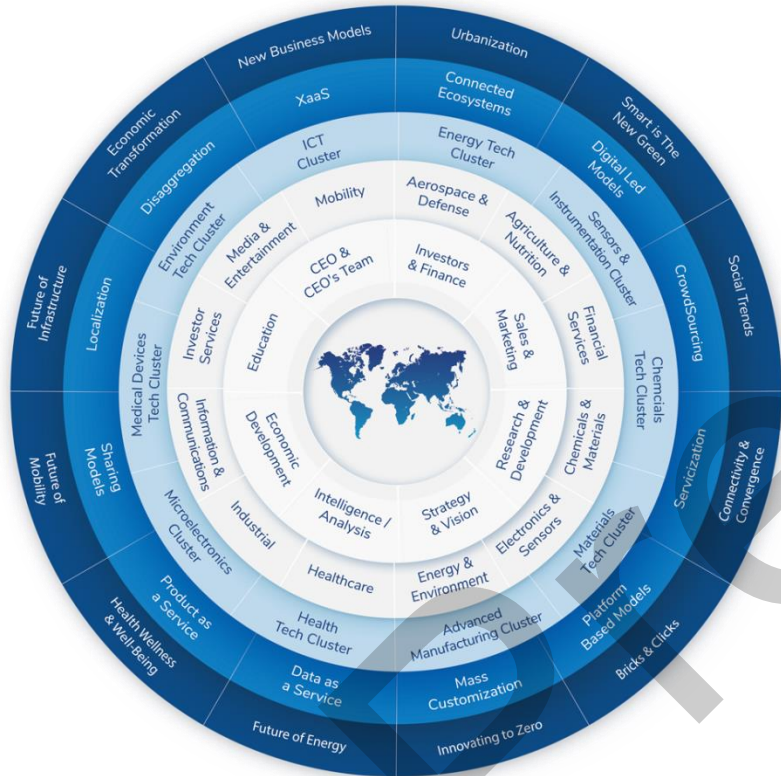


Source: Frost & Sullivan

Growth Opportunities Fuel the Growth Pipeline Engine™



The Innovation Generator™



Analytical Perspectives



The Growth Pipeline Engine™



Source: Frost & Sullivan

The background features a complex financial visualization with a blue and green color palette. It includes a bar chart with several bars of varying heights, a line graph with a red line showing an upward trend, and a candlestick chart on the right side. A numerical value '+11,000.00' is displayed in the middle-left area. The overall aesthetic is high-tech and data-driven.

Growth Opportunity Analysis—Global Femtech Solutions Market

Femtech Solutions Scope of Analysis

Frost & Sullivan defines femtech, short for female technology, in the context of healthcare, as a term that encompasses any device, diagnostic, product, software, app or service, or any combination thereof, that uses technology to focus exclusively on women's health.

Segments covered:

- Pre-menopause (adolescent phase and reproductive phase)
- Menopause
- Post-menopause and geriatric
- Cancer and other chronic diseases
- General health and wellness (novel solutions and services not overlapping with other segments)

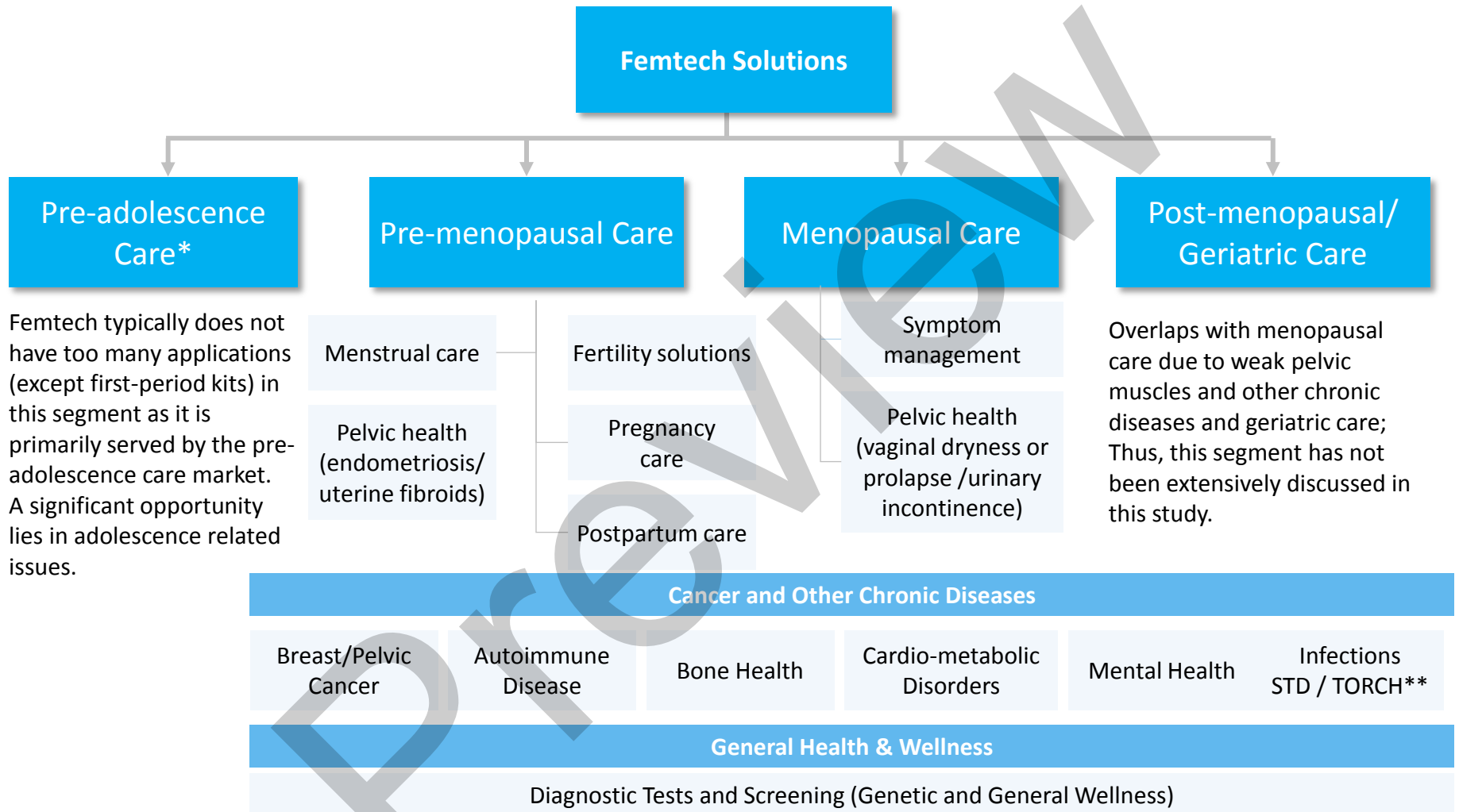
This study excludes:

- Pharmaceutical products
- Infant or baby care products and solutions
- Sexual health

Scope	
Geographic Coverage	Global
Study Period	2019–2025
Base Year	2020
Forecast Period	2021–2025
Monetary Unit	US Dollars

Source: Frost & Sullivan

Femtech Solutions Segmentation



Source: Frost & Sullivan

Growth Drivers for Femtech Solutions Market

Femtech Solutions Market: Growth Drivers, Global, 2021–2025

Driver	1–2 Years	3–4 Years	5th Year
The surge in women entrepreneurs and the emergence of more women-led startups are driving the femtech industry with innovative solutions to address long-standing women health and hygiene issues.	High	High	High
The growing awareness among women regarding health and wellness is boosting the femtech solutions industry. Also, the tech-savvy younger generation is more likely to adopt femtech solutions.	Medium	High	High
The push towards personal women’s health and wellness solutions has triggered the entry of large tech giants such as Apple and Fitbit into this market, with menstrual cycle tracking solutions.	Medium	High	High
There has been a rise in the number of female-focused investment VCs that are specifically focused on exclusively funding women’s health ventures. Portfolia, Fermata, and Avestria Ventures are such entities.	Medium	High	High
Untapped women’s health issues such as menopause, fibroids, and endometriosis are also witnessing traction.	Medium	Medium	High
Women’s empowerment is leading to a larger number of women in the workforce, which, in turn, has been increasing women’s purchasing power, resulting in an increased number of femtech solutions. Women’s empowerment is also making women more aware of health and hygiene issues as well as of technology that can help provide solutions.	Medium	Medium	High
The pharma industry is gaining interest in femtech. For instance, Bayer has shifted from focusing on contraception to focusing on non-hormonal menopausal symptoms by acquiring KaNDy Therapeutics Ltd. in August 2020.	Low	Medium	High
The United States introduced reimbursements for telehealth or remote patient monitoring (RPM) during the pandemic; it is expected that other parts of the world will gradually follow suit.	Low	Medium	Medium

Source: Frost & Sullivan

Growth Restraints for Femtech Solutions Market

Femtech Solutions Market: Growth Restraints, Global, 2021–2025

Restraint	1–2 Years	3–4 Years	5th Year
There is a lack of education and awareness about femtech among end-users . Currently, most femtech companies are having to educate the end users about the existence of their products in order to sell them. It's a difficult, time-consuming, and expensive process.	High	Medium	Medium
There is a lack of awareness amongst doctors and the care delivery community about innovative femtech solutions. A large part of the medical care community is still dependent on age-old solutions and there is, therefore, an unwillingness to experiment with new ones.	High	Medium	Medium
There is a gender bias among male investors, most of whom are unwilling to discuss women's health products.	Medium	Medium	Low
Femtech companies must overcome social stigma and taboo in order to get their message heard and find greater acceptance and adoption among potential end users	Medium	Medium	Low
The very term "femtech" limits its application only among cisgender women . There's a huge potential in the LGBTQ+ community, particularly among transmen. The term "femtech", therefore can be alienating for a sizeable potential end-user community.	Medium	Medium	Low
There is a dearth of clinical evidence to support the efficacy, and therefore the commercialization of femtech solutions. There is also a lack of appropriate business models and/or reimbursement policies to promote scalability.	Medium	Medium	Low

Source: Frost & Sullivan

The background features a complex financial visualization with a blue and green color palette. It includes a bar chart with a red line graph overlaid, a candlestick chart on the right, and various data points and grid lines. A prominent watermark 'FROST & SULLIVAN' is visible across the center. A dark blue horizontal bar contains the main title text.

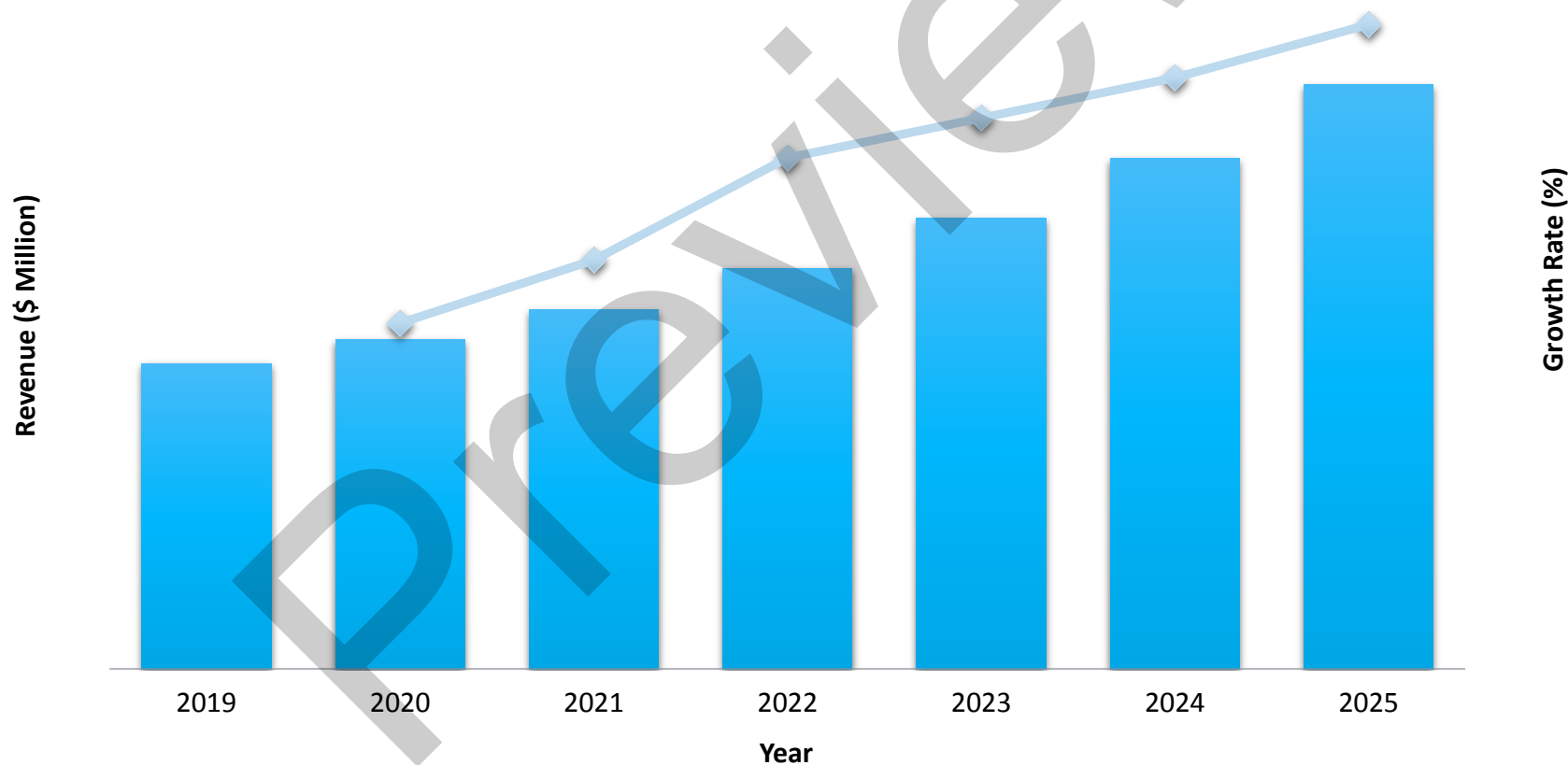
Impact of COVID-19 Pandemic on Femtech Solutions Market

Revenue Forecast—Femtech Solutions, Global, 2019–2025

Key Takeaway: Growth is being boosted by fertility, pregnancy, and menstrual care solutions segment, along with a surge in the menopausal solution segments, which recently started gaining traction with new services and solutions.

Femtech Solutions Market: Revenue Forecast, Global, 2019–2025

Revenue CAGR, 2020–2025 = 12.2%



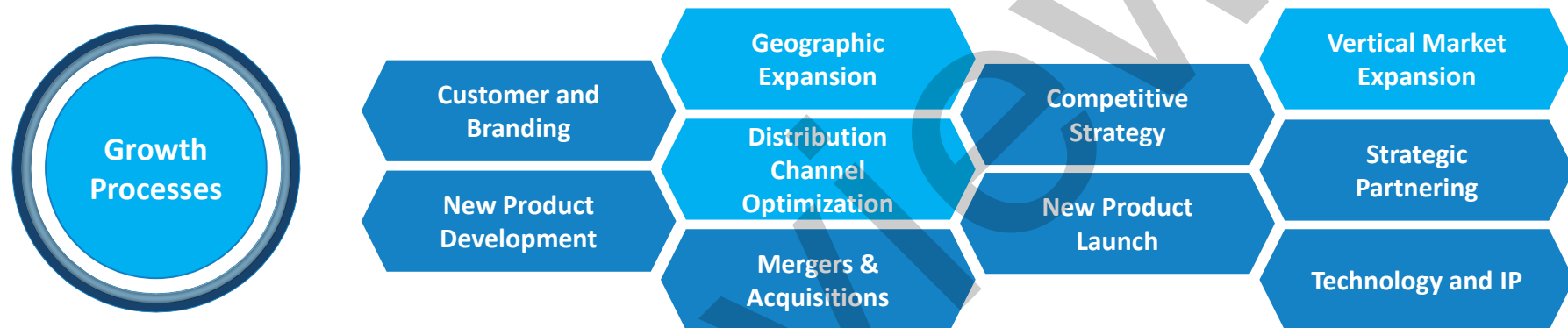
Note: All figures are rounded. The base year is 2020. Source: Frost & Sullivan



Growth Opportunity Universe—Global Femtech Solutions Market

Growth Opportunity 1: Affordable and Holistic Personalized Care for Women of All Ages Beyond Fertility and Pregnancy Care, 2020

Frost & Sullivan has identified 10 Growth Processes that serve as levers for determining and evaluating new Growth Opportunities.

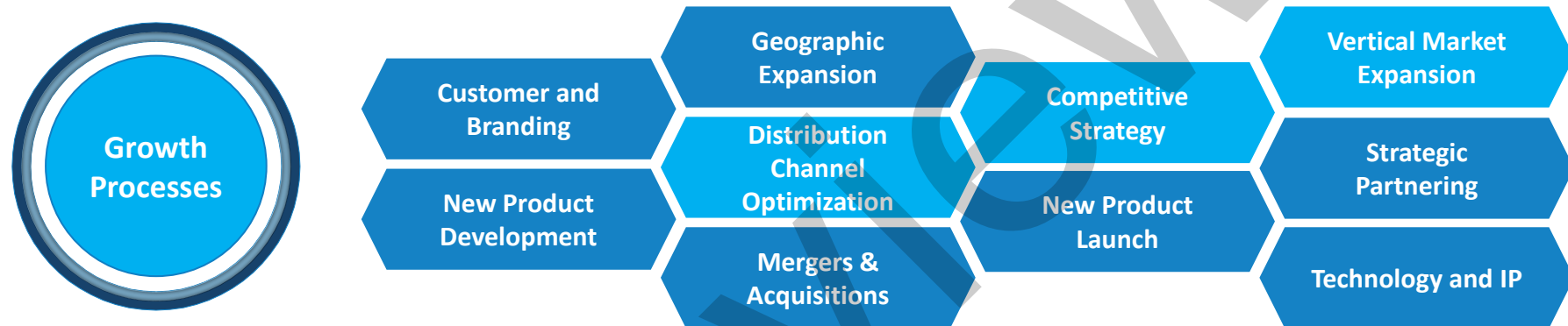


Opp. Size in 5 Years	\$100 M– \$500 M	Relevant Industries for this Growth Opportunity			Applicable Regions	
Timeline for Action	2 Years	Industrial Automation	Commercial Mobility	Security	North America	South Asia
		Environmental	Chemicals & Materials	Communications Tech	Latin America	Middle East
		Oil & Gas	Ag., Food & Nutrition	Information Tech	Cent/East Europe	European Union
		Building Technologies	Test & Measurement	Pharma & Biotech	Asia-Pacific	UK
		Consumer Electronics	Aerospace	Advanced Medtech	Africa	Japan
Base Year	2020	Consumer Mobility	Defense	Fintech	China	Oceania

Source: Frost & Sullivan

Growth Opportunity 2: Reviewing Predictors of Future Health for Women from Symptoms and Issues During Reproductive Phase, 2020

Frost & Sullivan has identified 10 Growth Processes that serve as levers for determining and evaluating new Growth Opportunities.

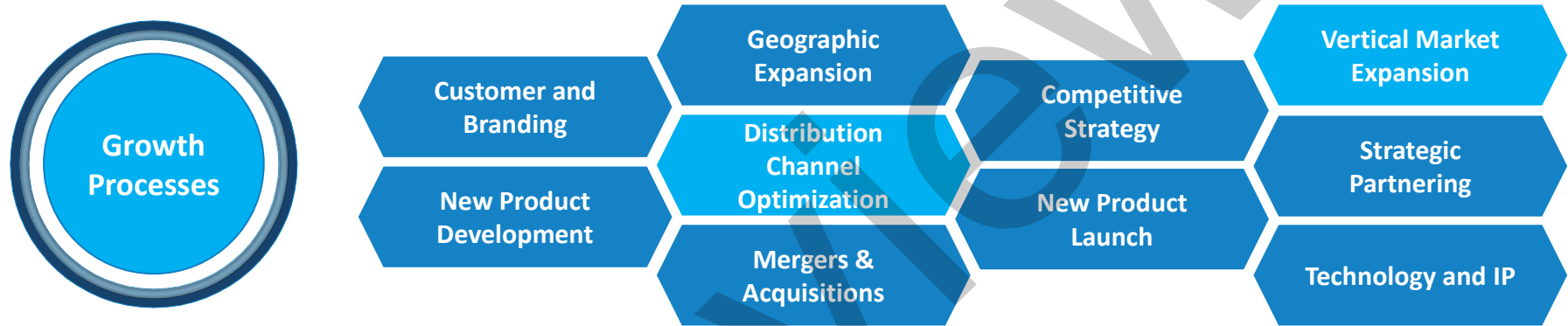


Opp. Size in 5 Years	\$100 M– \$500 M	Relevant Industries for this Growth Opportunity			Applicable Regions	
Timeline for Action	2 Years	Industrial Automation	Commercial Mobility	Security	North America	South Asia
		Environmental	Chemicals & Materials	Communications Tech	Latin America	Middle East
		Oil & Gas	Ag., Food & Nutrition	Information Tech	Cent/East Europe	European Union
Base Year	2020	Building Technologies	Test & Measurement	Pharma & Biotech	Asia-Pacific	UK
		Consumer Electronics	Aerospace	Advanced Medtech	Africa	Japan
		Consumer Mobility	Defense	Fintech	China	Oceania

Source: Frost & Sullivan

Growth Opportunity 3: Menopause Unveils Itself as the Next Big Opportunity in Global Femtech, 2020

Frost & Sullivan has identified 10 Growth Processes that serve as levers for determining and evaluating new Growth Opportunities.



Opp. Size in 5 Years	\$100 M– \$500 M	Relevant Industries for this Growth Opportunity			Applicable Regions	
Timeline for Action	2 Years	Industrial Automation	Commercial Mobility	Security	North America	South Asia
		Environmental	Chemicals & Materials	Communications Tech	Latin America	Middle East
		Oil & Gas	Ag., Food & Nutrition	Information Tech	Cent/East Europe	European Union
		Building Technologies	Test & Measurement	Pharma & Biotech	Asia-Pacific	UK
		Consumer Electronics	Aerospace	Advanced Medtech	Africa	Japan
Base Year	2020	Consumer Mobility	Defense	Fintech	China	Oceania

Source: Frost & Sullivan

Growth Opportunity 4: Innovative and AI-enabled Cancer Care Solutions to Enable Early Diagnosis and Address Issues Related to Survivors, 2020

Frost & Sullivan has identified 10 Growth Processes that serve as levers for determining and evaluating new Growth Opportunities.

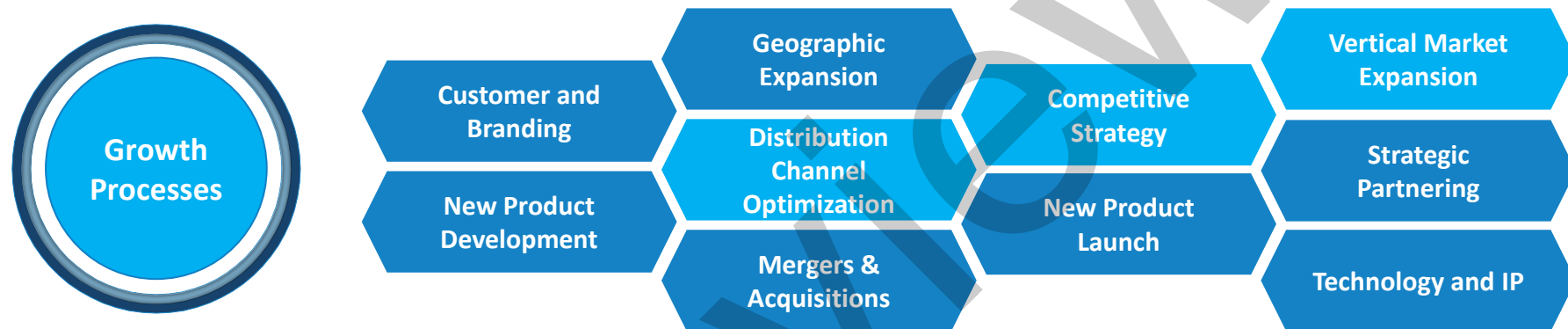


Opp. Size in 5 Years	\$100 M– \$500 M	Relevant Industries for this Growth Opportunity			Applicable Regions	
Timeline for Action	3 Years	Industrial Automation	Commercial Mobility	Security	North America	South Asia
		Environmental	Chemicals & Materials	Communications Tech	Latin America	Middle East
		Oil & Gas	Ag., Food & Nutrition	Information Tech	Cent/East Europe	European Union
		Building Technologies	Test & Measurement	Pharma & Biotech	Asia-Pacific	UK
		Consumer Electronics	Aerospace	Advanced Medtech	Africa	Japan
Base Year	2020	Consumer Mobility	Defense	Fintech	China	Oceania

Source: Frost & Sullivan

Growth Opportunity 5: Targeting the Employer Health Insurance Market to Improve Their Women Employees Health, 2020

Frost & Sullivan has identified 10 Growth Processes that serve as levers for determining and evaluating new Growth Opportunities.



Opp. Size in 5 Years	\$100 M– \$500 M	Relevant Industries for this Growth Opportunity			Applicable Regions	
Timeline for Action	3 Years	Industrial Automation	Commercial Mobility	Security	North America	South Asia
		Environmental	Chemicals & Materials	Communications Tech	Latin America	Middle East
		Oil & Gas	Ag., Food & Nutrition	Information Tech	Cent/East Europe	European Union
		Building Technologies	Test & Measurement	Pharma & Biotech	Asia-Pacific	UK
		Consumer Electronics	Aerospace	Advanced Medtech	Africa	Japan
Base Year	2020	Consumer Mobility	Defense	Fintech	China	Oceania

Source: Frost & Sullivan

Next Steps

Why Frost, Why Now?

Our Expertise

EXPERIENCE

- 60 years of proven global experience
- Trusted partner of investors, corporates, and governments

COVERAGE

- Industry convergence through comprehensive coverage
- Global footprint to match client needs

ANALYTICS

- Innovation Generator™ driving 6 analytical perspectives
- Proprietary growth tools and frameworks

BEST PRACTICES

- Growth Pipeline Engine™ and Companies to Action™
- 10 Growth Processes: Best practices foundation

Client Impact

- **FUTURE GROWTH POTENTIAL:** Maximized through collaboration
- **GROWTH PIPELINE™:** Continuous flow of growth opportunities
- **GROWTH STRATEGIES:** Proven best practices
- **INNOVATION CULTURE:** Optimized customer experience
- **ROI & MARGIN:** Implementation excellence
- **TRANSFORMATIONAL GROWTH:** Industry leadership

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