

FemTech Industry Analytical Framework

www.femtech.health

www.frameworks.technology

www.dkv.global

FemTech Industry Framework

FemTech Investors

Venture Capital Funds

Accelerators and Incubators

Angel Groups

Family Investment Offices

Private Equity Firms

Government Offices & University Programs

Investment Banks

FemTech Companies

Reproductive Health & Contraception

General Healthcare

Pregnancy & Nursing

Women's Longevity

Menstrual Health

Mental Health

Pelvic & Uterine Healthcare

Sexual Health

Menopause Care

Women's Wellness

Product Types Across Subsectors

Diagnostics

Telehealth

Devices (Wearables, Hardware, etc.)

Drugs, Vitamins & Supplements

Services

Apps / Software

Consumer Products

Digital Platform

FemTech Hubs & Communities

Partnership and Networking

Startups Support Programs and Platforms

Events, Media and Marketing

FemTech R&D Centers and Labs

Clinical and Scientific Medical Centers

Research, Policy and Education Institutions

R&D of Innovative Products and Services

FemTech Companies

Reproductive Health & Contraception

- Fertility and infertility care and treatment; ovulation monitoring; pregnancy testing; ovarian reserve diagnostics; novel contraception and birth control products.
- Assisted reproductive technologies: artificial insemination – intrauterine insemination (IUI), intracervical insemination (ICI), intravaginal insemination (IVI), in vitro fertilization (IVF), intracytoplasmic sperm injection (ICSI), etc.; egg and embryo testing, freezing and preservation, frozen embryo transfer (FET), egg donation.
- Digital tools to improve women's reproductive health education and knowledge, engage with peer community, and overcome challenges.
- Subsector product types: in-clinic services and procedures, at-home fertility care platforms, medical devices, wearables, tests, apps, teleconsultation, consumer products, drugs, vitamins and supplements.

Menstrual Health

- Products, services and initiatives that address issues of menstruators through the four phases of the menstrual cycle – menstruation, the follicular phase, ovulation and the luteal phase, to achieve the complete physical, mental, and social well-being.
- This category also considers menstrual femcare products such as innovative, natural and sustainable hygienic pads, tampons, cups, period-proof underwear, etc, as well as sanitary waste solutions.
- Subsector product types: consumer products (including subscription-based home delivery kits), dispensers for public spaces, period tracking apps, wearables (e.g. for period pain-relief, tracking cycle), medical devices (e.g. for treatment of Heavy Menstrual Bleeding (HMB), for monitoring vaginal effluents), educational digital platforms, drugs, vitamins and supplements, virtual and in-clinic services.

Pregnancy & Nursing

- A variety of solutions on maternal, fetal, neonatal and child health to assist throughout the pregnancy, post-natal and childcare period and help to be connected to healthcare professionals.
- Technologies addressing the decrease of maternal and child mortality, preterm births; prenatal genetic screening and carrier testing; physical and mental female wellness during pregnancy, postpartum and parenting; education on pregnancy, lactation and breastfeeding, etc.
- Subsector product types: apps and software (e.g. for pregnancy monitoring, mental health, feeding time and child well-being tracking), diagnostic tools, devices, digital platforms, telehealth, consumer products, services, drugs, vitamins and supplements.

Pelvic & Uterine Healthcare

- Technologies to improve pelvic organs, at any life stage, as it plays vital role in complete physical, mental, social, and sexual well-being.
- Preventive care, treatment, diagnostics, testing and screening of pelvic organs (uterus, cervix, ovaries). Conditions are, but not limited to: prolapse or sagging of the organs; weakening of pelvic muscles and connective tissues, incontinence; problems with bladder and bowel function; cancers; other affecting the proper function of a woman's pelvic organs.
- Subsector product types: devices (wearables, hardware, etc.), diagnostics, digital platforms, apps and software, telemedicine, drugs and supplements, consumer products.

FemTech Companies

Women's Longevity

- Technologies to advance women's healthspan and increase longevity throughout different stages in life.
- The Longevity category includes preventive medicine, solutions for detection, monitoring, and treatment of genetic and chronic diseases, as well as biometrics and lifestyle solutions.
- Subsector product types: diagnostics, drugs, vitamins and supplements, services, wearables (e.g. health trackers), apps and software, digital platforms.

Menopause Care

- Start-ups address the symptoms of menopause in innovative ways to improve life for those who are experiencing menopause later in life, as well as better predict when it is likely to hit the menopause phases, how menopause could be affected due to experiences in other life phases (menstruation, fertility, pregnancy, etc.), and better community support for those who are experiencing menopause at this stage of life.
- Subsector product types: digital platforms, apps, supplements, telehealth, consumer products, wearables.

General Healthcare

- Holistic health promotion, preventive care (immunization, general health screening), hormonal health, treatment of acute and chronic illness, autoimmune diseases, breast cancer, and appropriate referral for more specialized needs where required.
- The category embraces any health conditions, not included in other specific subsector.

Mental Health

- Technologies to improve emotional, psychological, and social well-being. It affects how women think, feel, and act.
- These companies also help determine how women handle stress, relate to others, and make choices, as well as empowerment solutions.
- Does not include solutions for mental wellness of pregnant and postpartum people.
- Subsector product types: apps, digital platforms, teleconsultation, wearables, vitamins and supplements.

Sexual Health

- Companies focus on the physical, emotional, mental and social well-being related to sexuality and sex and intimate hygiene.
- Sexual health is another area continuing to emerge with new mobile app solutions to help women obtain contraception, innovative hardware to achieve orgasms, prevent, test and treat STDs and access sex education tools and resources.
- Subsector product types: consumer products, devices (wearables, hardware, etc.), digital platforms, apps, telehealth.

Women's Wellness

- Companies that encourage a holistic approach to female wellness.
- Innovative femcare products and clothes (except period products).
- Nutrition & Fitness comprises solutions specific for women with a focus on body positivity, fitness apps that adjust workouts to health condition/cycle, and nutritional programs/apps specific to women's health realities.

FemTech Investors

Venture Capital Funds

- Venture funds deploying capital in high-growth companies that significantly improve access, care, and outcomes in women's health.
- These funds aim to accelerate breakthroughs in different areas of female health and make them more widely available and affordable.
- Although access to VC funding is a key challenge in the FemTech space, venture capital is the most widespread source of funding among all investors types.

Angel Groups & Family Investment Offices

- Focus on emerging technologies, products, and services improving women's health and wellness for all age categories.
- Within FemTech, include mainly female angel investors who are primarily interested in female-founded, female-led start-ups.
- Family-owned investment funds create value by helping FemTech startups and early-stage companies become market leaders.

Private Equity Firms

- Private equity firms provide capital to women's health and female-led companies in FemTech involved in health care, technology and services.
- They usually provide growth capital, strategic support and value-added partnership to the most promising companies and focus on delivering sustainable returns over the long term.

Accelerators and Incubators

- Accelerators and incubators play significant role in the FemTech sector, providing seed- and early-stage companies with access to funding, mentorship, and network to help them grow and thrive.
- There are also philanthropic portfolios addressing the key women's health issues through grants, investments, convenings, and advocacy, motivated by reaching inclusivity, accessibility and affordability, filling gaps in healthcare for women, social & gender equality.

Government Offices and University Programs

- Financial, R&D and innovation support to projects and companies that show promise of commercial and societal impact in women's health space.
- Provide strategic capital to companies in high-tech industries; promote science-based innovation in the interests of the industry and society.

Investment Banks

- Investment banks are valuable source of funding instruments providing business banking products and services to small and middle-market FemTech companies.

FemTech Hubs & Communities

Partnership and Networking

- Associations, societies and communities, usually referring to a certain country or region, building ecosystem of founders, investors, researchers, healthcare professionals, industry experts, and enthusiasts, operating in FemTech.
- They aim to inspire, support and connect members, build networks and empower business partnerships across the FemTech industry.

Startups Support Programs and Platforms

- Hubs and organizations committed to accelerating the development of the FemTech industry, reducing the funding gap for FemTech startups and turning them into fundable and commercially viable companies.
- Their acceleration programs and platforms provide advisory and pitching tools that help FemTech entrepreneurs launch, grow, and get funding ready, empowering today's motivated technology innovators turn their transformative ideas into breakthroughs.

Events, Media and Marketing

- Organizations engaged into advancing and promoting the FemTech sector through knowledge-sharing events like conferences, summits, webinars, workshops, panel discussions, and also insightful newsletters, media materials and marketing, consulting and educational services.

FemTech R&D Centers and Labs

Clinical and Scientific Medical Centers

- Clinical trials and research centers and laboratories aiming to improve aspects of health exclusively found in women (e.g. breast, uterine, ovarian issues), predominantly found in women (e.g. osteoporosis, hypothyroidism) or misdiagnosed in women (e.g. heart disease).

Research, Policy and Education Institutions

- Organizations narrowly focused on women's health through science, policy, and education or bring together interdisciplinary specialists researching sex and gender differences in health and disease in order to address unmet needs and research gaps in women's health.

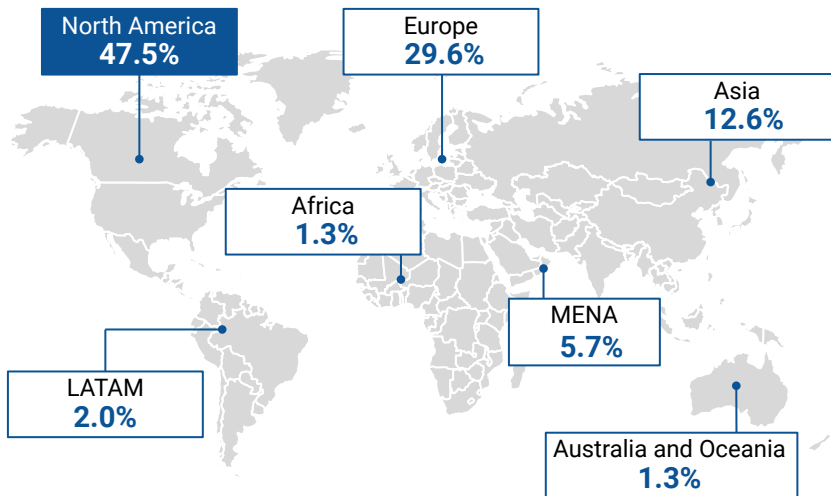
R&D of Innovative Products and Services

- Organizations refer to research and development of innovative products and services based on new technologies which are focused on women's health.

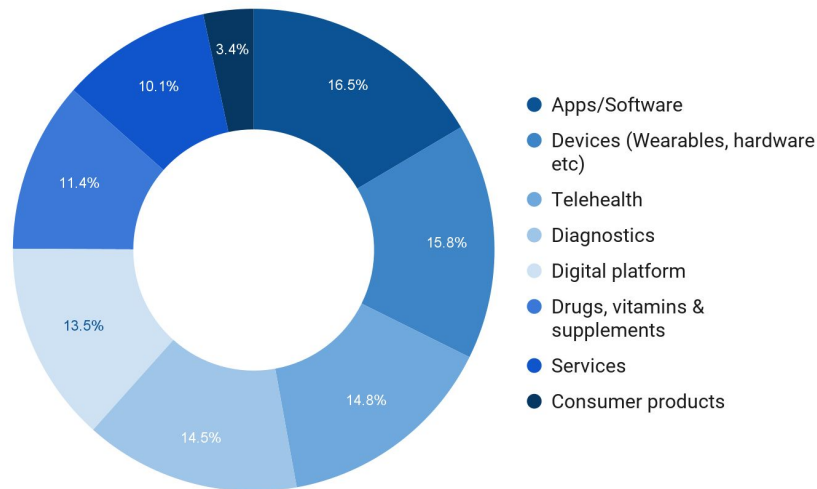
Reproductive Health & Contraception

The Reproductive Health & Contraception segment of FemTech covers a range of products and services, such as fertility and infertility care and treatment, ovulation monitoring, pregnancy testing, ovarian reserve diagnostics, and novel contraception and birth control products.

Distribution of Reproductive Health & Contraception Companies by Region, %



Distribution of Reproductive Health & Contraception Companies by Product Type, %



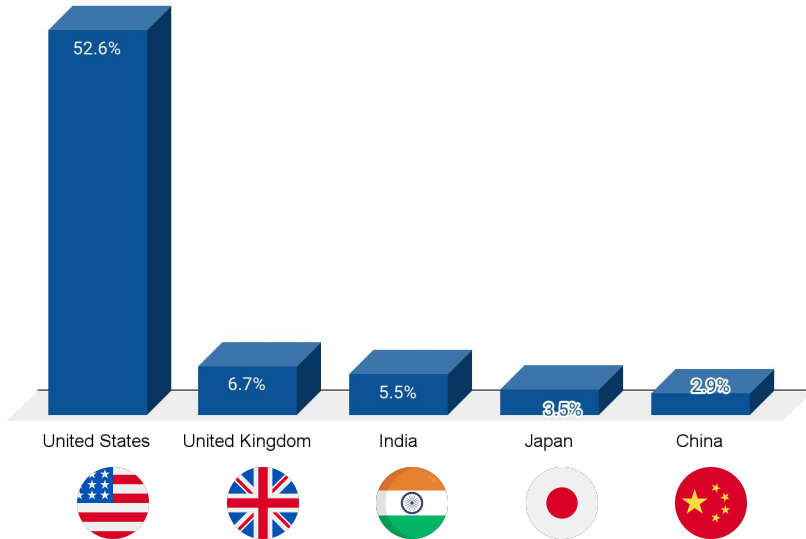
Selected Reproductive Health & Contraception Companies



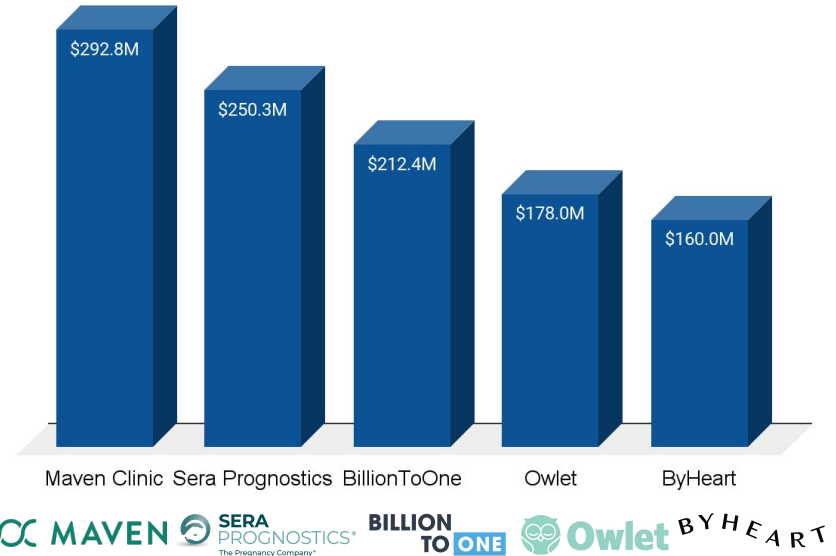
Pregnancy & Nursing

The Pregnancy & Nursing segment of FemTech provides a range of solutions focused on maternal, fetal, neonatal, and child health. These solutions assist throughout the pregnancy, post-natal, and childcare period and help individuals to stay connected to healthcare professionals.

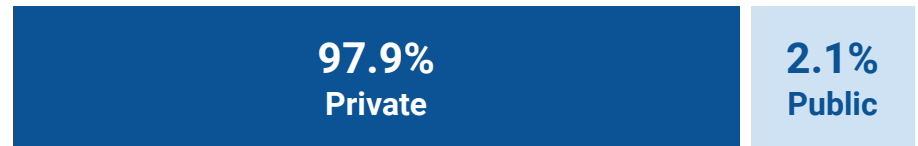
Top 5 Countries by the Number of Pregnancy & Nursing Companies, %



Top 5 Pregnancy & Nursing Companies by Total Funding, \$M



Number of Pregnancy & Nursing Companies by IPO Status



Pelvic & Uterine Healthcare

The Pelvic & Uterine Healthcare segment of FemTech provides technologies to improve the health of pelvic organs at any life stage, as it plays a vital role in complete physical, mental, social, and sexual well-being.

Pelvic & Uterine Healthcare Companies by Product Type

Apps/Software **MY**™
COREFLOOR

Consumer products **EVB**™

Devices (Wearables,
hardware etc) **CALDERA**
MEDICAL

Diagnostics **DotLab**

Digital platform **Amara**
therapeutics

Drugs, vitamins
& supplements – **Gynica**

Services **Alma**

Telehealth **Origin.**

Top 5 Pelvic & Uterine Healthcare Companies by Total Funding, \$M



sword **viveve** **elvie** **minerva** The Uterine Health Company **LUMENIS**

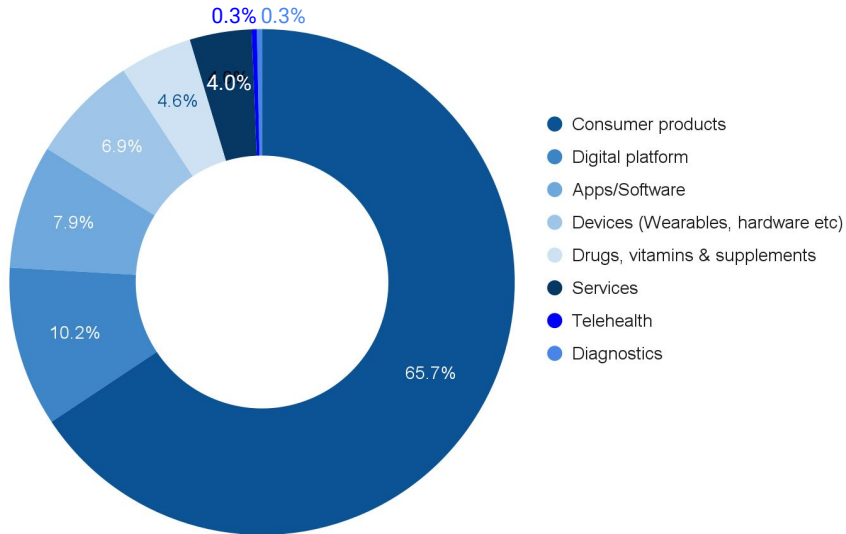
Number of Pelvic & Uterine Healthcare Companies by Funding Status, %

51.9% Seed	19.3% M&A	13.5% Early Stage Venture
9.6% Late Stage Venture	3.8% IPO	1.9% Series A

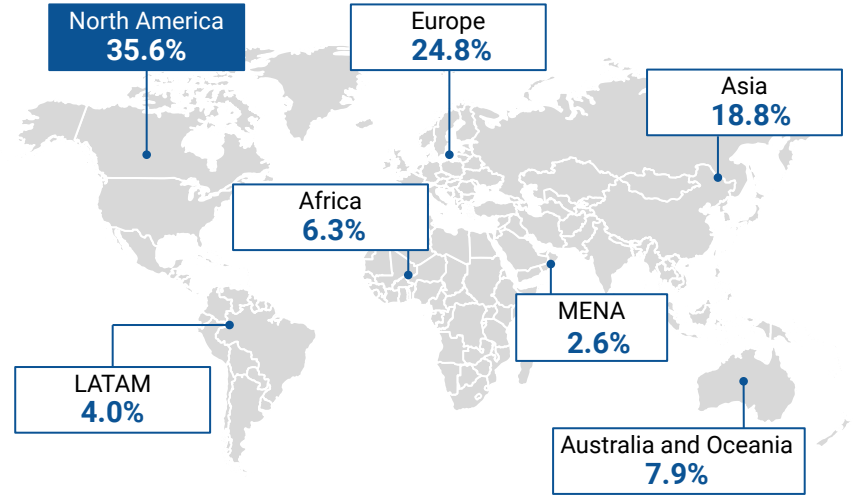
Menstrual Health

The Menstrual Health segment of FemTech encompasses products, services, and initiatives that address the needs of menstruators throughout the four phases of the menstrual cycle. The goal is to achieve complete physical, mental, and social well-being.

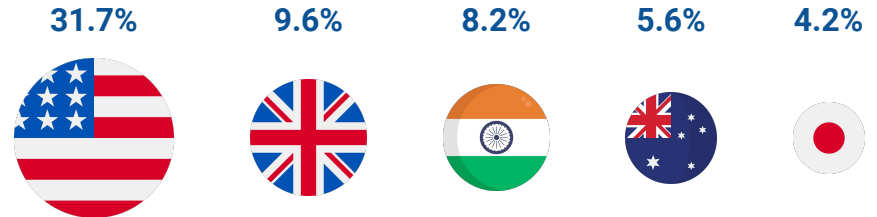
Distribution of Menstrual Health Companies by Product Type, %



Distribution of Menstrual Health Companies by Region, %



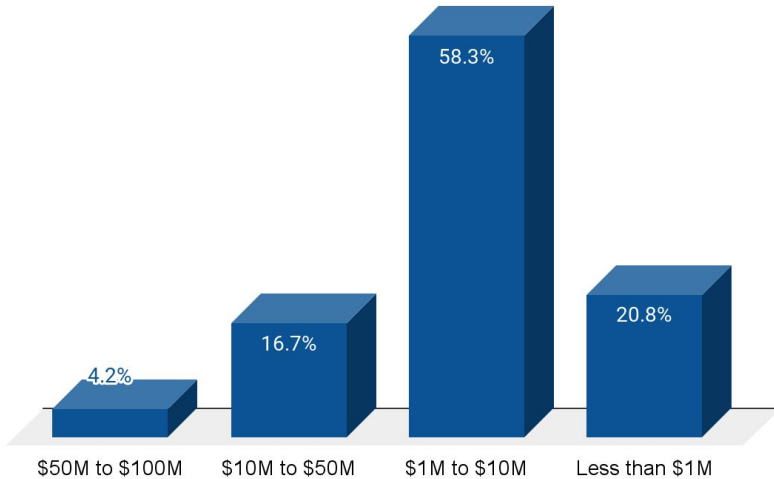
Top 5 Countries by the Number of Menstrual Health Companies



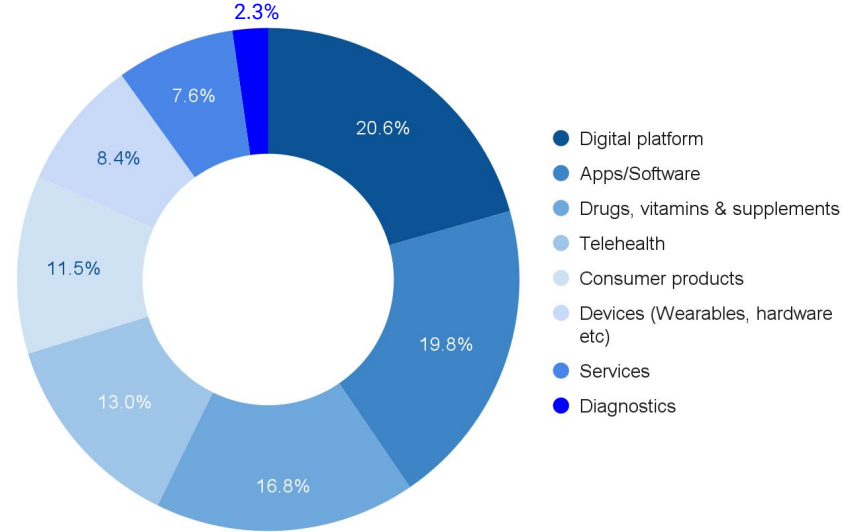
Menopause Care

Startups in the menopause care category aim to improve the quality of life for women experiencing menopause by addressing its symptoms in innovative ways. They also seek to predict when menopause is likely to occur, how it could be affected by experiences in other life phases, and provide better community support for those going through menopause.

Distribution of Menopause Care Companies by Revenue



Distribution of Menopause Care Companies by Product Type, %



Number of Menopause Care Companies by IPO Status, %

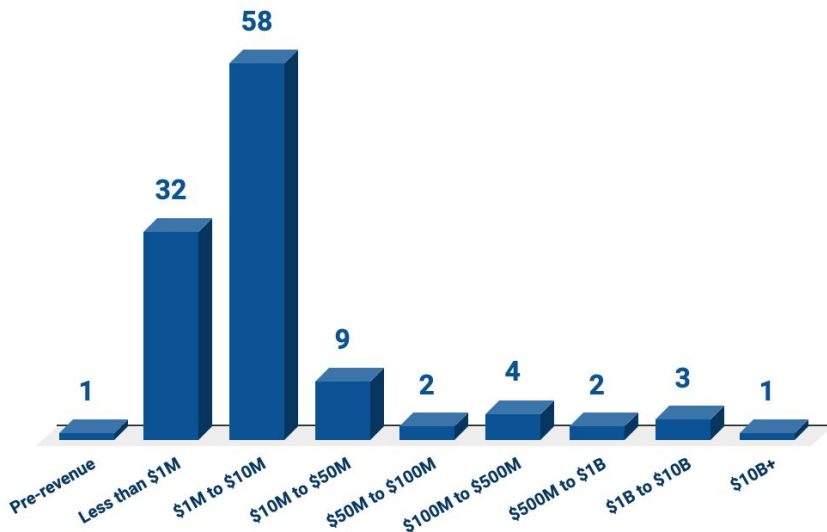
98.7%
Private

1.3%
Public

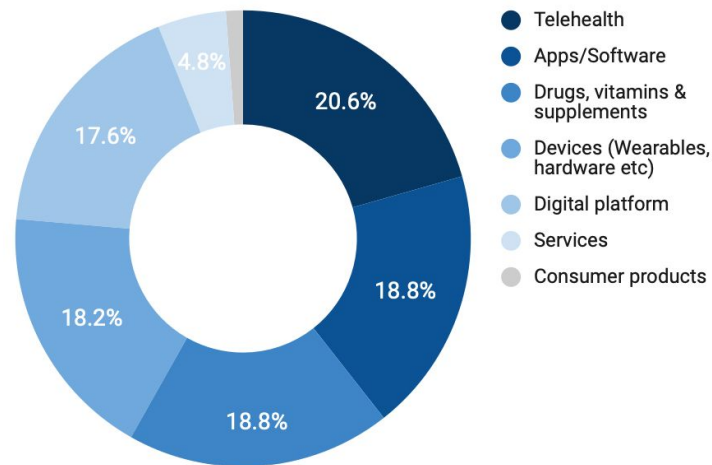
General Healthcare

The General Healthcare sector in FemTech includes a wide range of products and services that are designed to improve women's health and wellbeing. These technologies are focused on helping women to monitor and manage their health, and to access high-quality healthcare services.

Distribution of General Healthcare Companies by Revenue Range



Distribution of General Healthcare Companies by Product Type



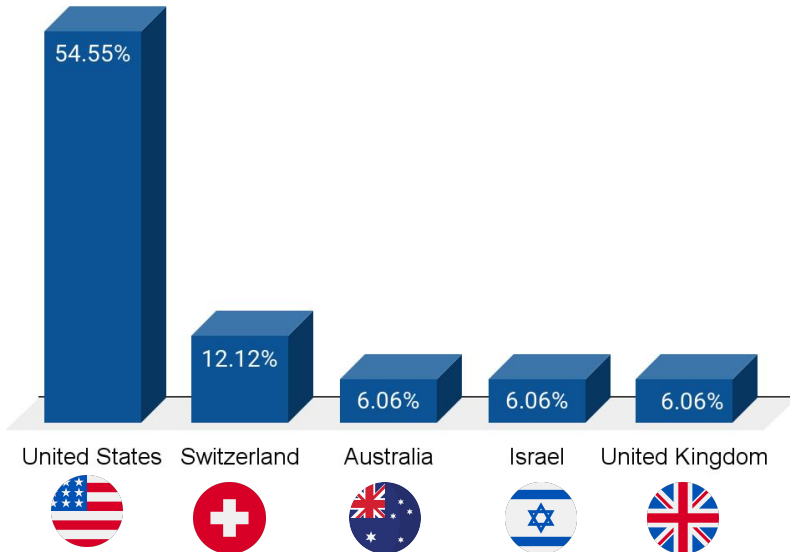
Selected General Healthcare Companies



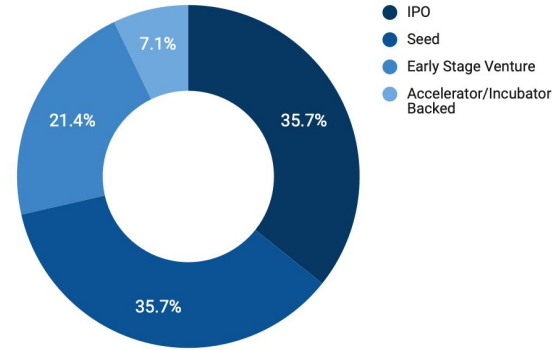
Women's Longevity






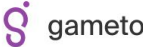

The Women's Longevity sector in FemTech is focused on developing technologies and products that promote women's health and wellness, with the goal of extending their lifespan and improving their quality of life as they age.

Distribution of Women's Longevity Companies by Country



Distribution of Women's Longevity Companies by Funding Status

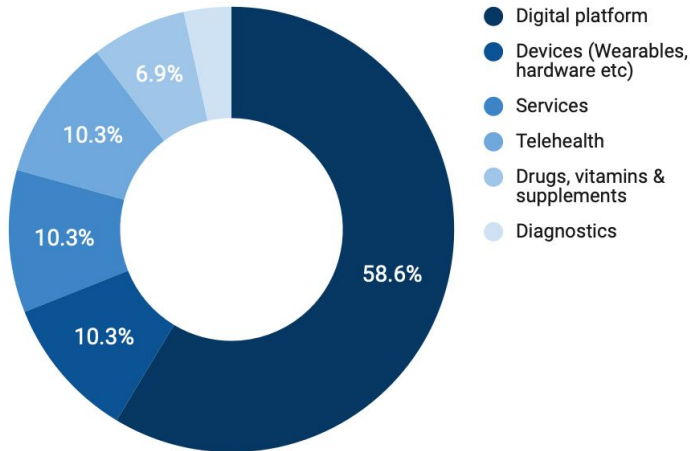


	IPO	
	Seed	
	Early Stage Venture	
	Accelerator/Incubator Backed	

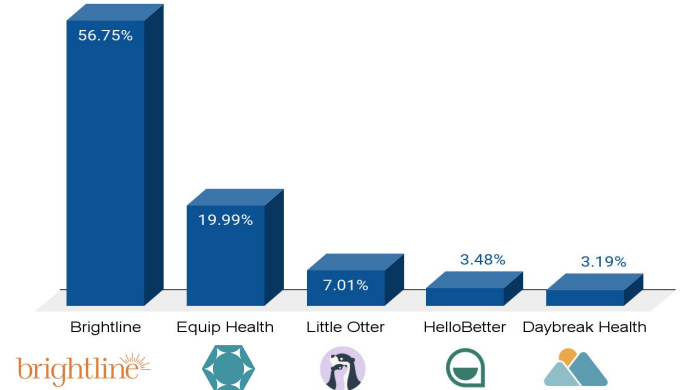
Mental Health

The Mental Health sector within FemTech is an area that has seen significant growth in recent years, with a number of companies developing products and services to support women's mental health.

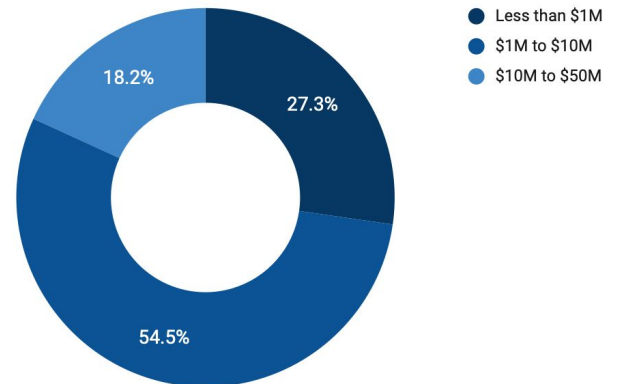
Distribution of Mental Health Companies by Product Type



Distribution of Mental Health Companies by Total Funding Amount



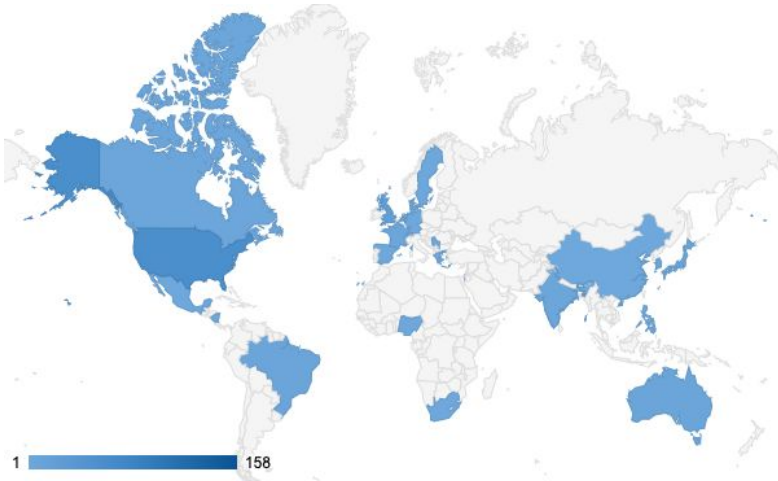
Distribution of Mental Health Companies by Revenue Range



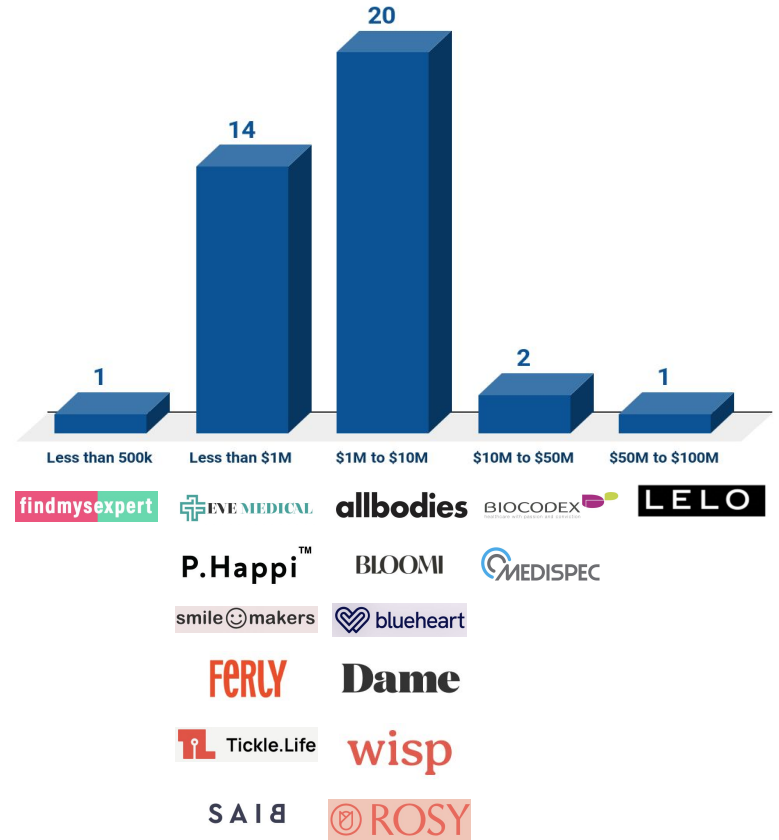
Sexual Health

The Sexual Health sector within FemTech has grown significantly in recent years, with a focus on developing products and services to support women's sexual health and wellness. It is focused on providing women with accessible, affordable, and personalized solutions for their sexual health needs.

Distribution of Sexual Health Companies by Country



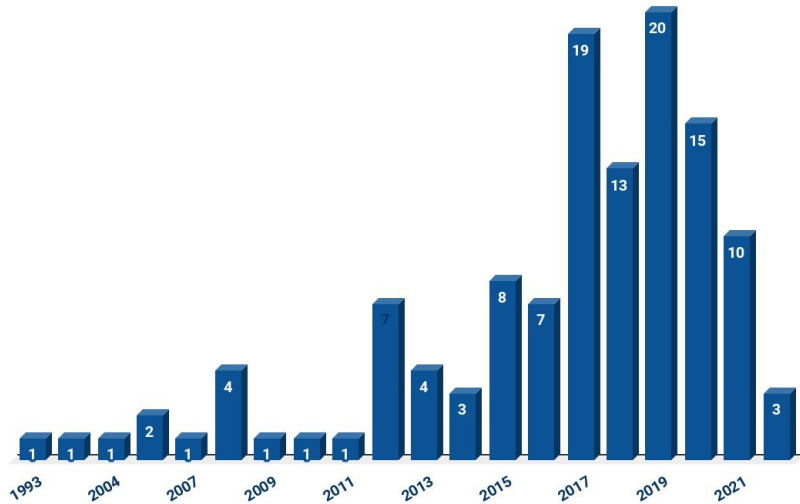
Distribution of Sexual Health Companies by Revenue Range



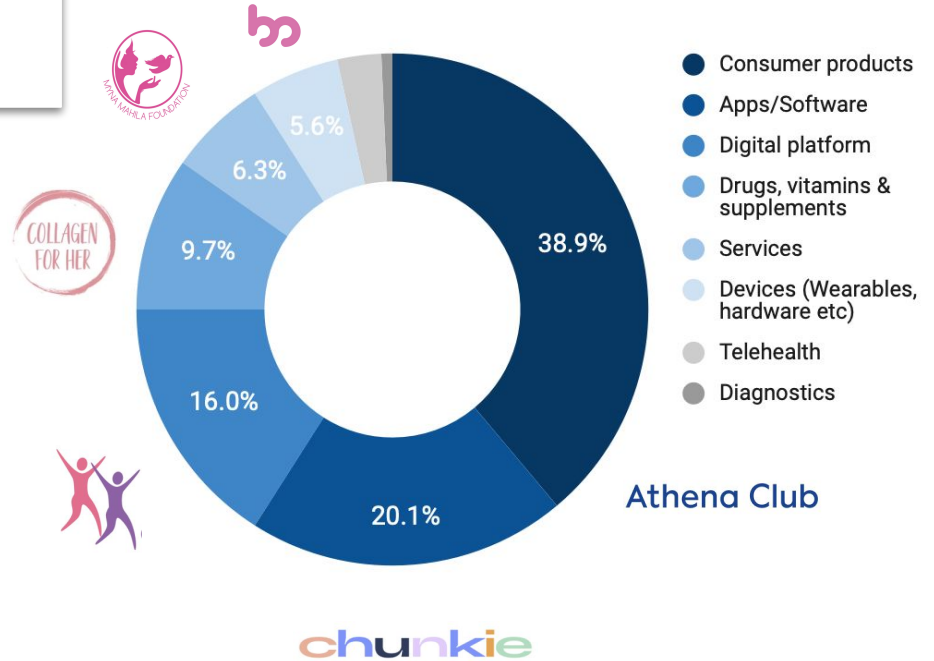
Women's Wellness

Women's Wellness is the holistic approach to the health and well-being of women. It encompasses physical, mental, emotional, and spiritual health, and it is focused on preventive measures to maintain optimal health and wellness throughout a woman's life.

Distribution of Women's Wellness Companies by Founded Year



Distribution of Women's Wellness Companies by Product Types



Deep Knowledge Group

