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ASSOCIATION
ASIA

SEPTEMBER 2026

Insights into the Femtech Landscape in Southeast Asia

INDONESIA | MALAYSIA | SINGAPORE
THAILAND | THE PHILIPPINES | VIETNAM



About the Study

- Femtech Awareness & Familiarity
- Usage and Spending Habits Among Current Femtech Users
- Femtech Non-Users Future Intentions
- Women's Health Education
- Openness in Discussing Women's Health Issues
- Media Influence on Women's Health Issues
- Religious Influence on Women's Health Issues
- Maternal & Reproductive Health
- Hormonal Health / Menopause

The core research specifications are outlined in the table below and is based on a natural fallout of the online female population (aged 18 years+) with interlocking age quotas

Markets covered	Indonesia, Malaysia, Singapore, Thailand, The Philippines, Vietnam
Sample size	N=6,000 females overall (N=1,000 female citizens aged 18+ in each of Indonesia, Malaysia, Singapore, Thailand, The Philippines and Vietnam)
Fieldwork dates	12 Feb - 4 March 2026
Survey length	41 questions



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Femtech Awareness & Familiarity



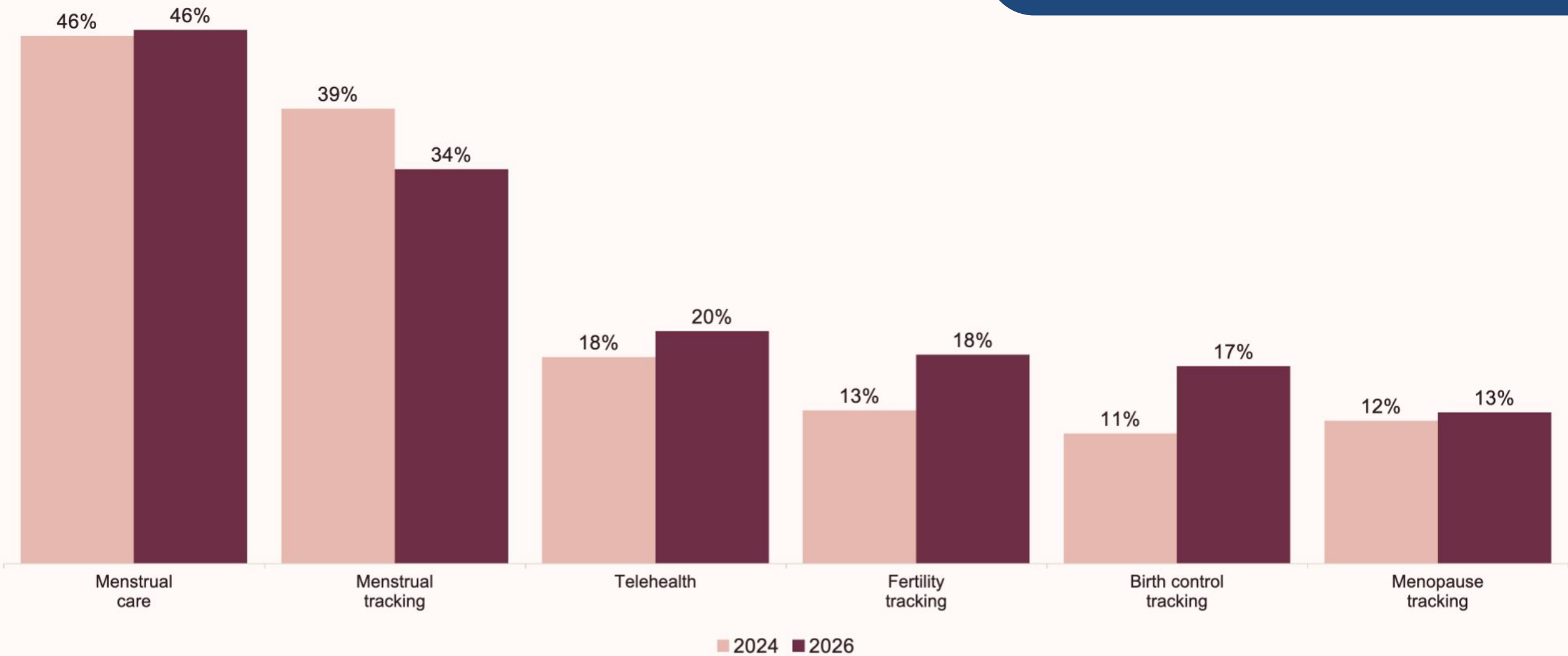
Southeast Asian women understand femtech more, and more broadly

Regional averages across Indonesia, Malaysia, Singapore, Thailand, The Philippines and Vietnam

27%
of SEA women now recognise the term “femtech” — up from 25% in 2024, with gains in almost every market

25%
say they don't recognise any femtech category — down slightly from 26% in 2024, suggesting overall category awareness remains broadly stable

Category recognition is broadening beyond period care



Recognition is still anchored in menstrual care, but the fastest gains, birth control tracking and fertility tracking show women's understanding of femtech is stretching into reproductive planning and virtual care.

 **Did you know?**
27% of femtech startups across these Southeast Asian markets focus on menstrual care



Users are moving from generic tracking to targeted solutions

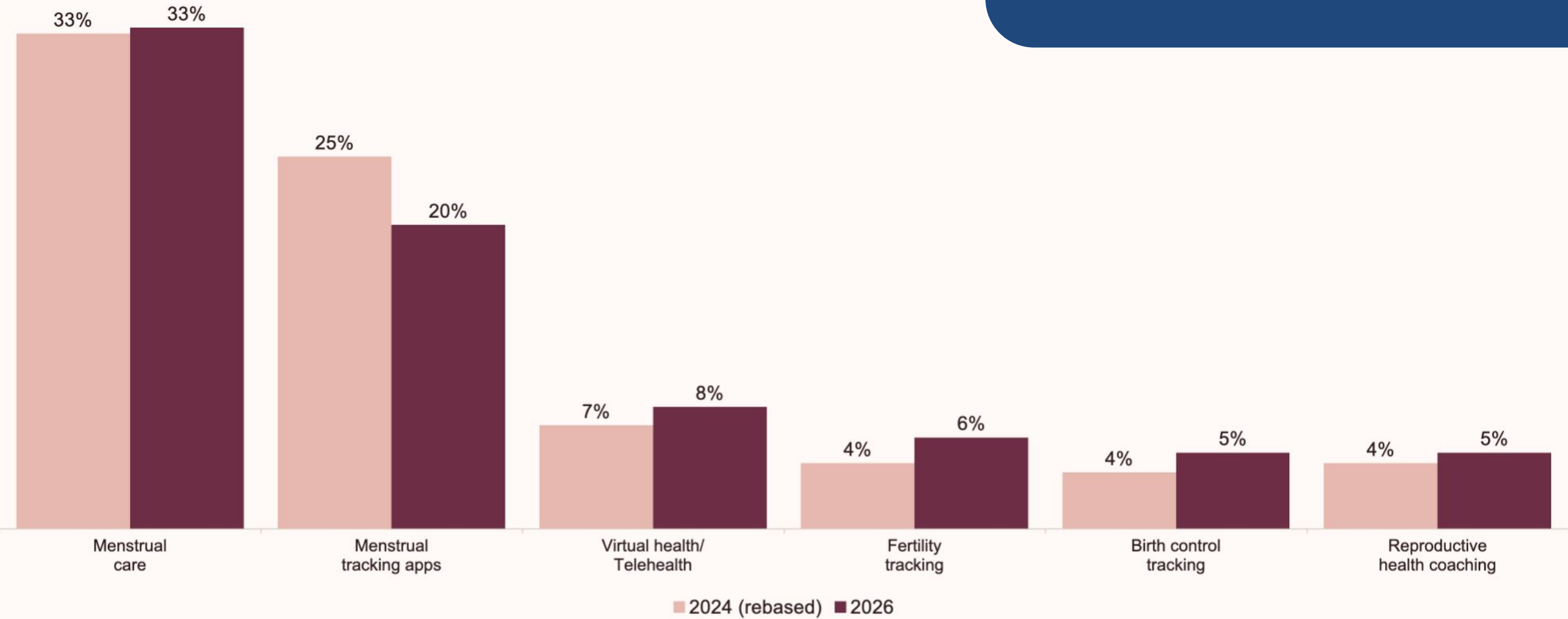
Usage and spending habits among current femtech users, regional average, 2024 vs 2026

+39%
relative growth in fertility-tracking app usage — the fastest-growing category among current users

+35%
relative growth in birth control & contraception tracking app usage since 2024

78%
of current users still plan to spend more on femtech — nearly unchanged from 79% in 2024

Category usage share, among all SEA women



2024 figures **rebased** to the full sample for comparability — the original 2024 question was asked only of the 74% of respondents who recognised a femtech category.

**Did you know?**

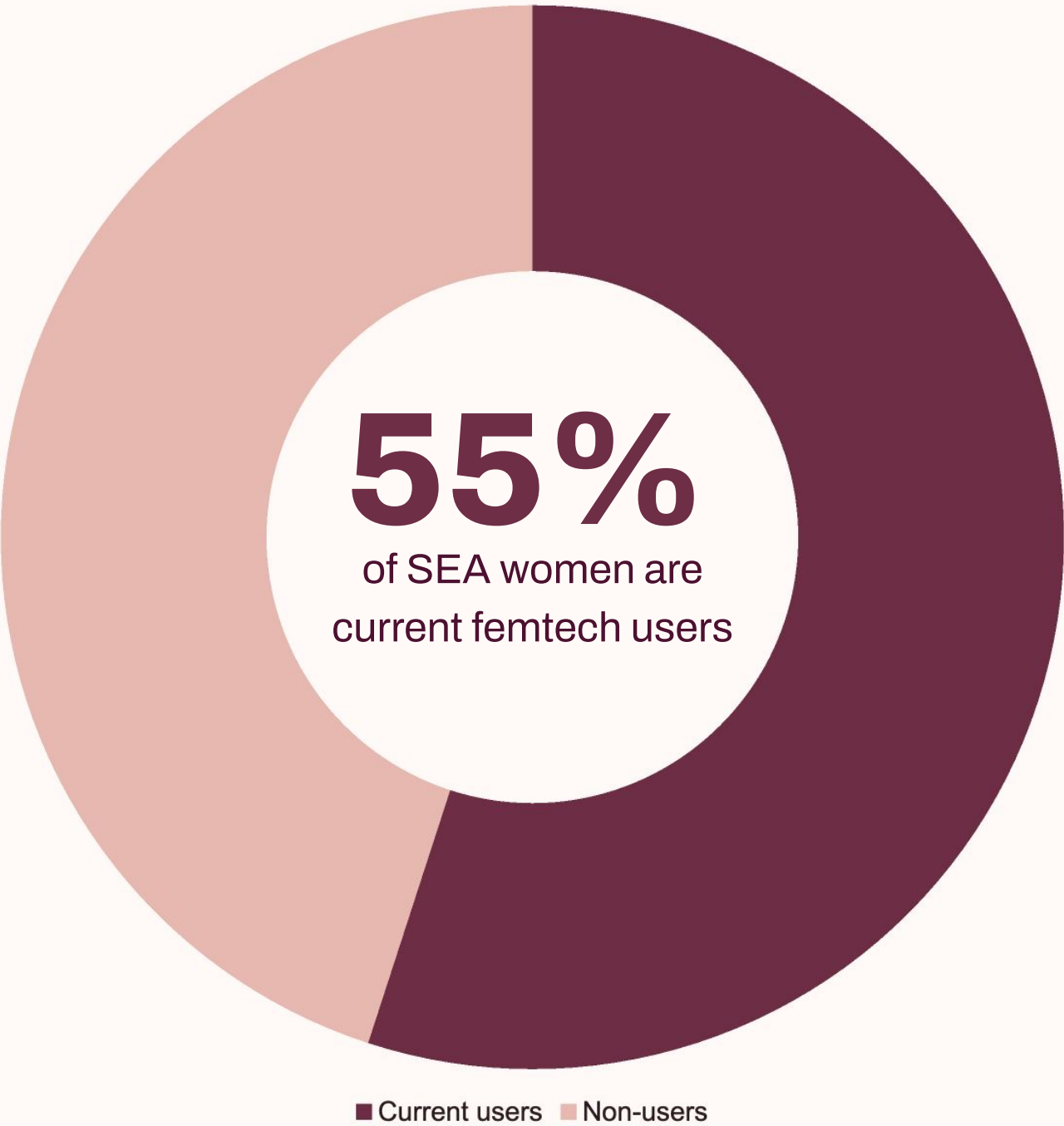
Only 7% of femtech startups across these Southeast Asian markets focus on fertility



2026 insight: Usage isn't shrinking, it's diversifying — as reliance on generic menstrual tracking apps eases, current users are picking up more targeted tools for fertility, contraception and virtual care, while remaining are just as willing to spend.

The user base has matured, not shrunk

Femtech users vs non-users, Southeast Asia, 2026



SINCE 2024

Close to 6 in 10 women were femtech users in 2024. In 2026, that's held at just over 5 in 10 — a modest easing, not a slowdown, as the category settles into the mainstream.

58%

2024 user share
(rebased to full sample)

55%

2026 user share

–3pts

change — a plateau,
not a decline

2024 figure rebased to the full sample for comparability with 2026 (see methodology note).

2026 insight: With just over half of SEA women now using femtech, the region's next wave of growth is set to come from spending depth among existing users, not from recruiting new ones.

Spending outpaced even our own 2024 forecast

Femtech consumer spending, Southeast Asia, 2024 vs 2026 (USD)

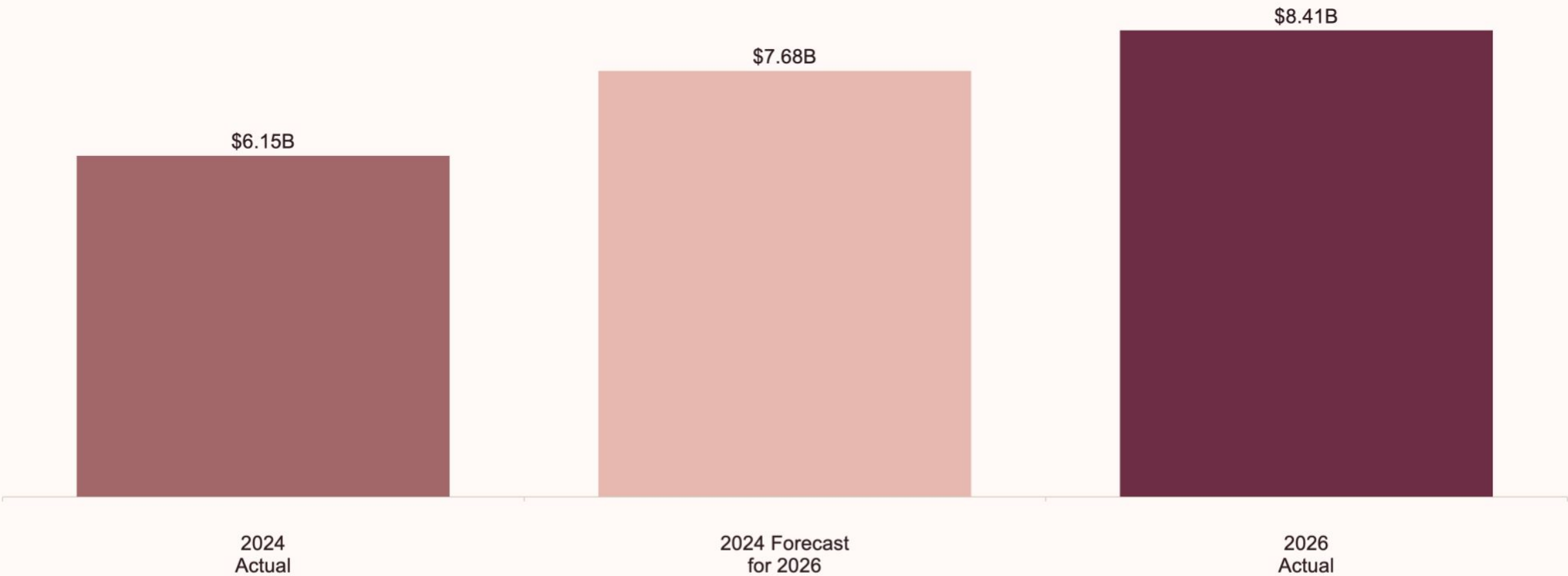
\$8.4B

2026 market size — up 36.7% from \$6.15B in 2024

+\$730M

ahead of the region's own 2024 growth forecast — 9.5% above projection

Market size: actual vs. 2024's own forecast (USD Billion)



2024 forecast built from: **current users' projected spending increase (+\$330M)** + **new entrants from intending non-users (+\$1.2B)**

2026 insight: The region's femtech market didn't just meet its 2024 growth forecast* — it beat it by over \$700M, showing consumer appetite is compounding faster than the industry itself anticipated. *Source: Insights into the Femtech Landscape in Southeast Asia 2024*

Exploring Potential Femtech Adoption Among Non-Users



For non-users, it's less about barriers, more about relevance

Main barriers to femtech adoption among non-users, Southeast Asia, 2026

36%

say they simply don't need femtech — by far the single largest response

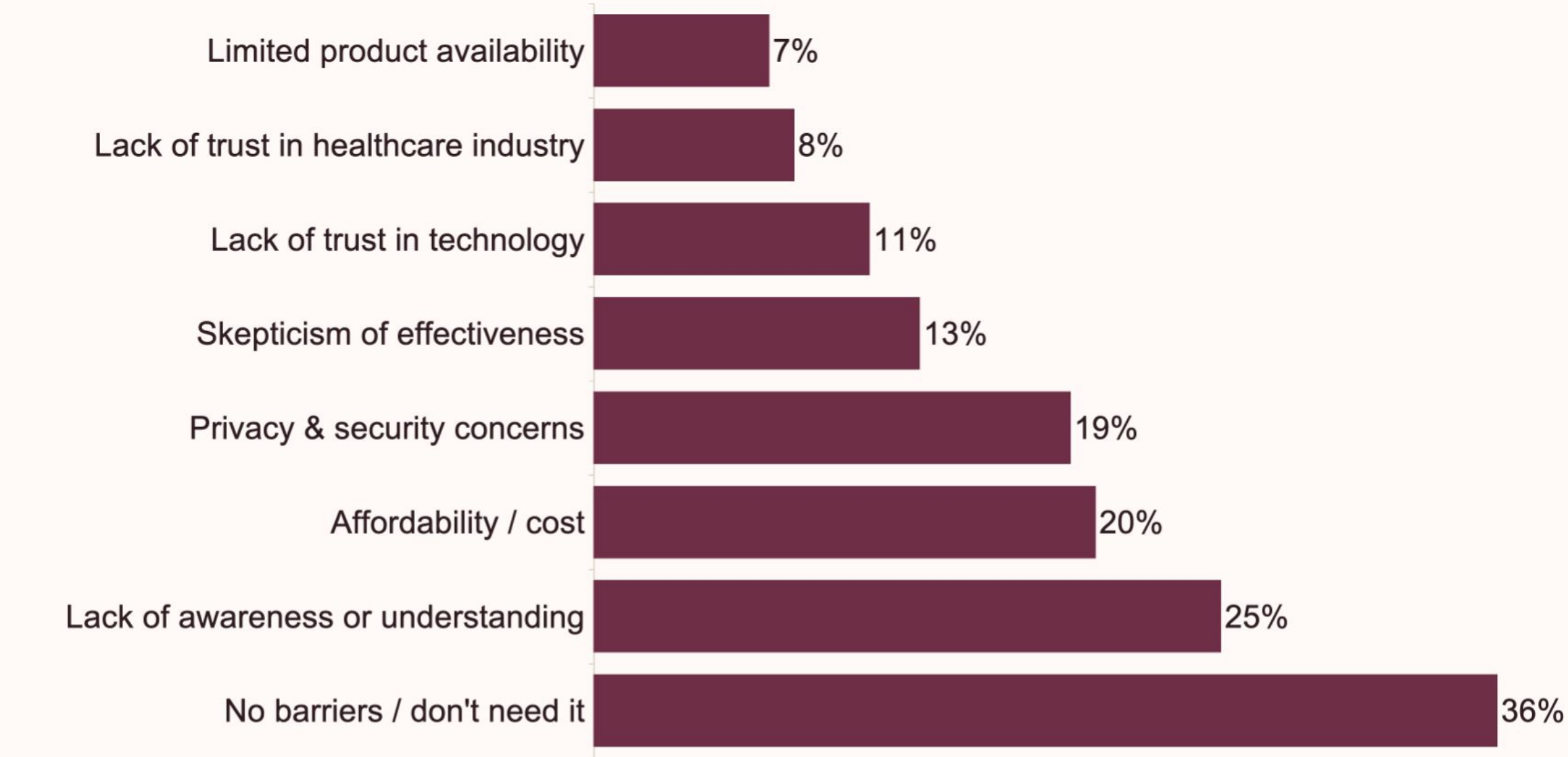
25%

still cite lack of awareness or understanding — the clearest remaining education gap

20%

point to affordability and cost as a barrier to trying femtech products

Top barriers cited by non-users, 2026



2024 flashback: “Lack of awareness” was the #1 barrier at 42%. In 2026, it has fallen to a distant second, while “no barriers / don’t need it” is now the most common response.

School still leads women’s health education, but the internet is catching up fast

Where women learned about women's health topics, Southeast Asia, 2026

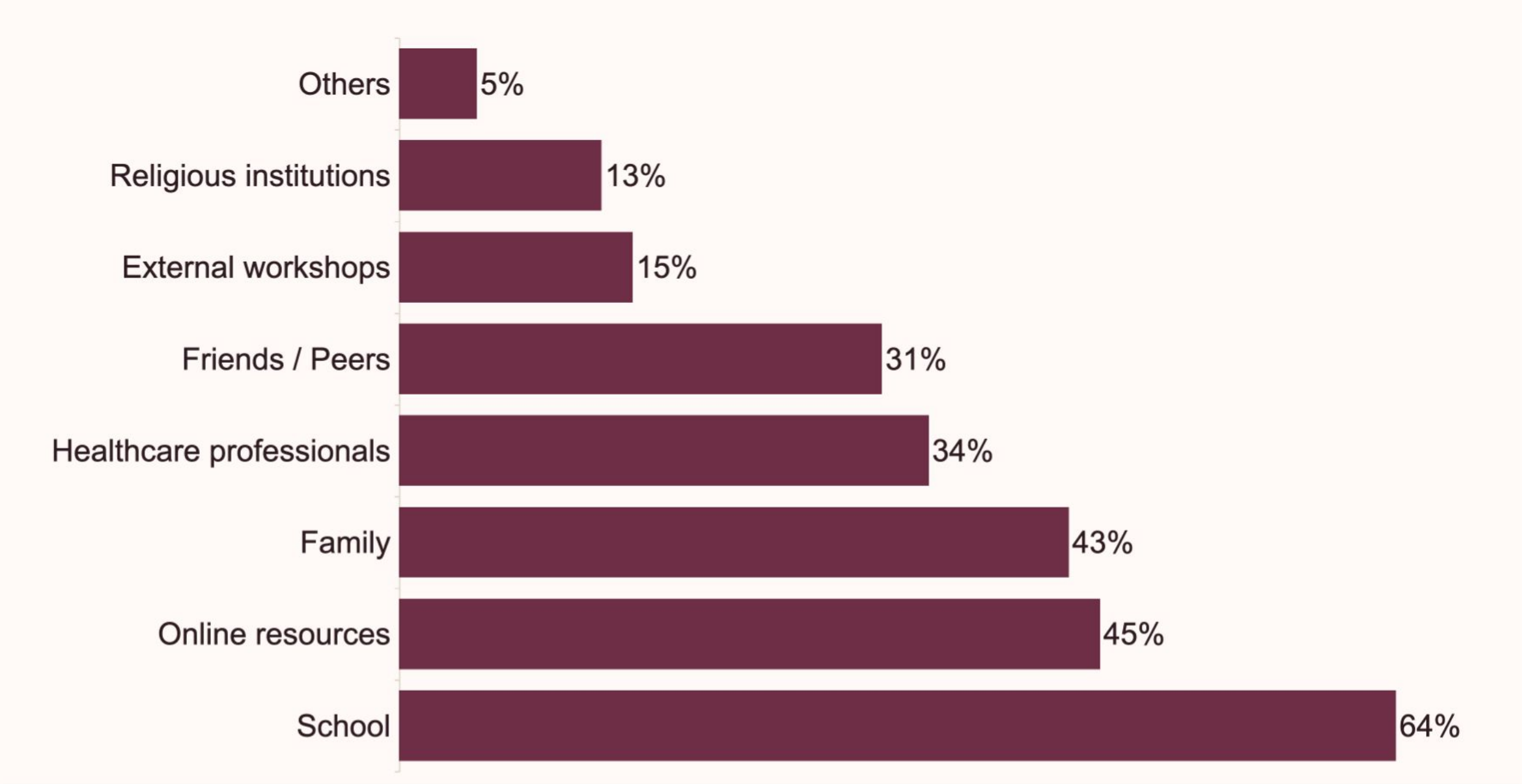
64%

of women learned about women’s health at school — still the single biggest channel by far

45% vs 43%

online resources now edge out family as the #2 source of health education

Sources of women's health education, regional average



2026 insight: Formal education still sets the foundation, but online resources have become a near-equal source to family — a growing digital front door for femtech brands to reach women with credible information.

Fear of judgment is still the biggest barrier to speaking up

Key challenges to openly discussing women's health issues, Southeast Asia, 2026

46%

cite fear of judgment or shame — the single most-cited barrier to speaking up

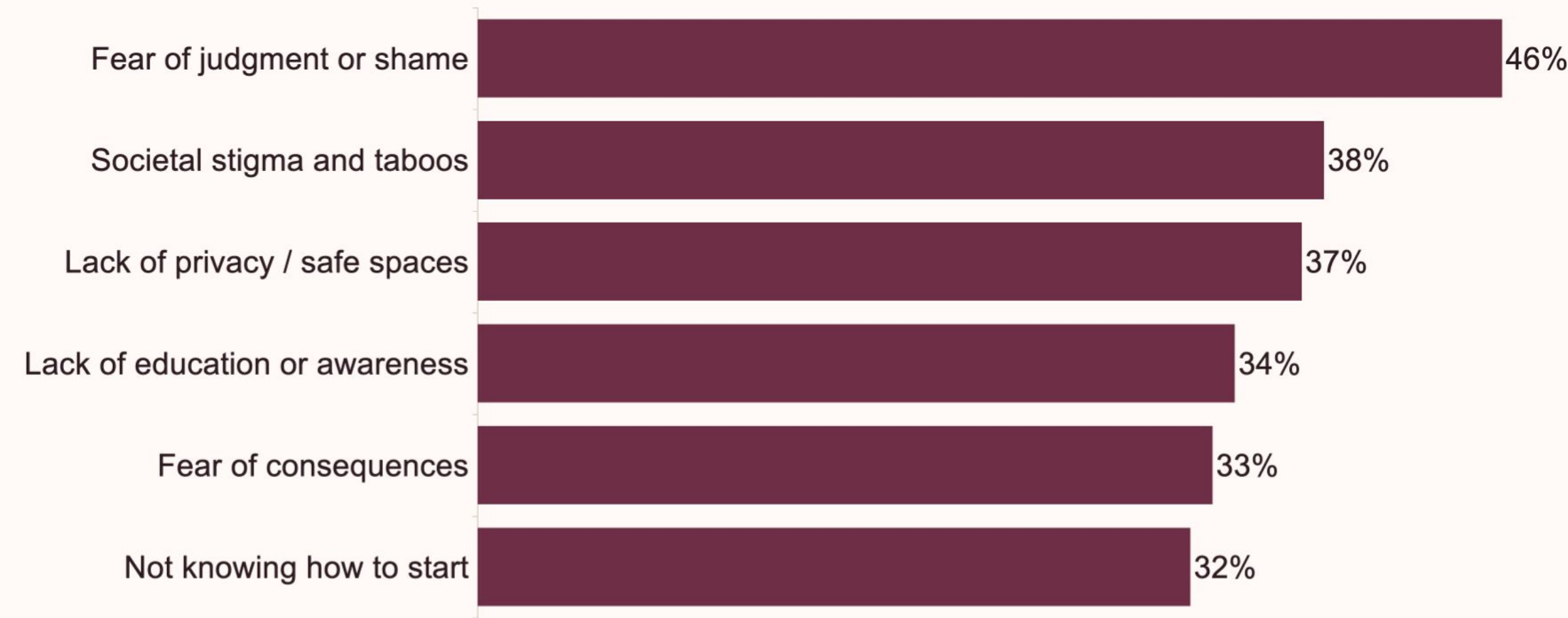
38%

point to societal stigma and taboos — the second most-cited challenge

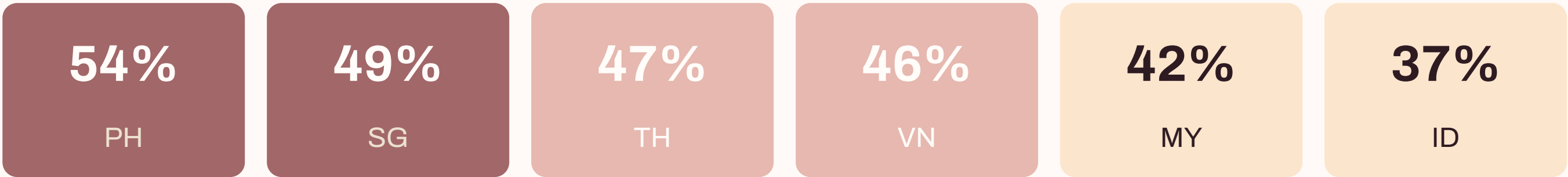
17pts

gap on “fear of judgment” between the highest (Philippines) and lowest (Indonesia) markets

Top challenges cited by women, regional average (2026)

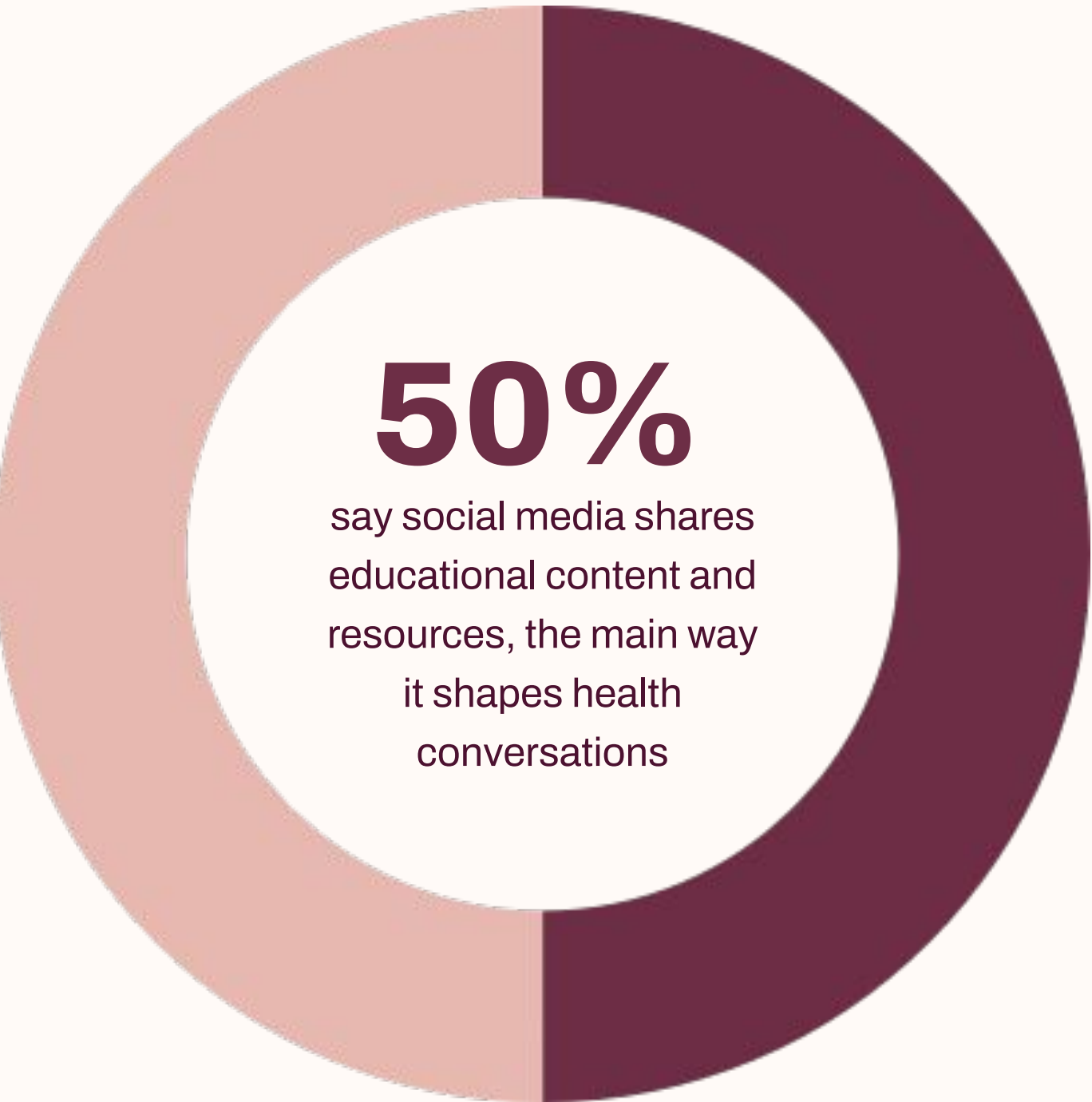


2026 country spotlight — % citing fear of judgment or shame as a barrier



Social media is still where SEA women turn for health information

How social media shapes women's health conversations, Southeast Asia, 2026



Other ways social media shapes the conversation

- 40%** Provides a platform for sharing personal experiences
- 37%** Facilitates open conversations via online communities
- 37%** Influences societal perceptions of women's health
- 35%** Increases awareness through hashtags and trends
- 34%** Increases awareness through influencers/celebrities

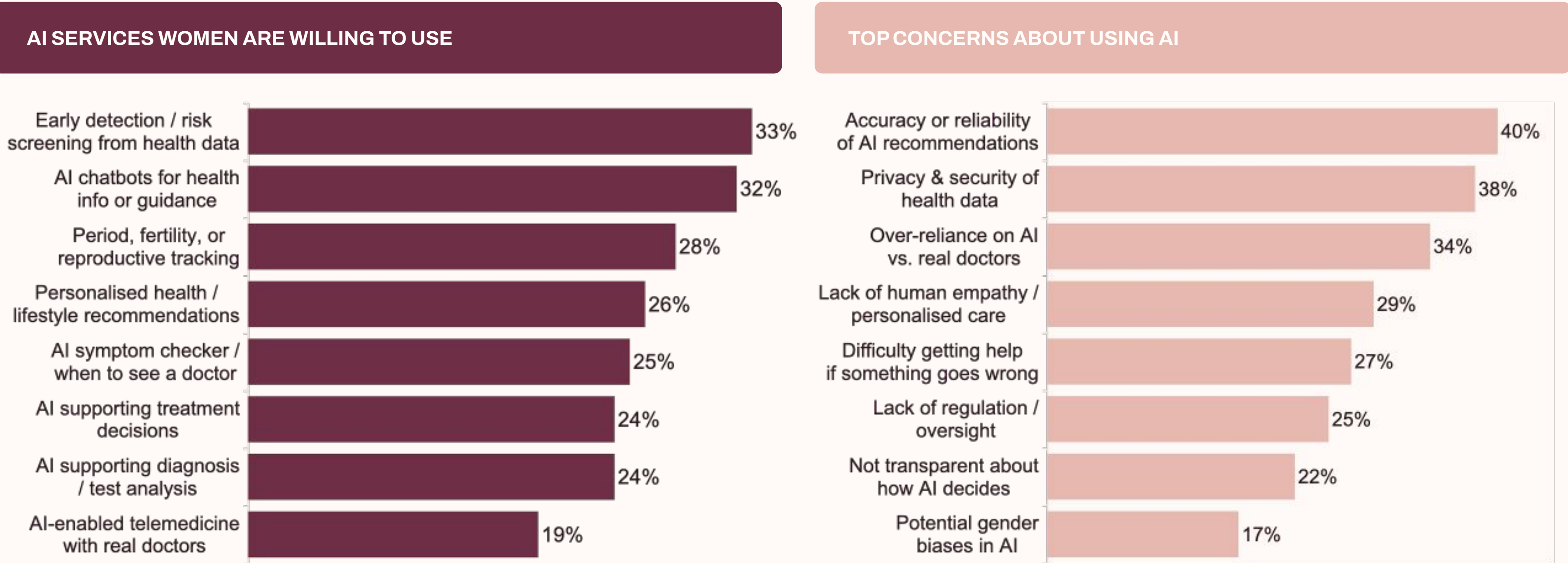
2024 flashback: Educational content was already the top response in 2024 at 53% — the role social media plays has stayed consistent, even as most category figures eased slightly.

The Future of Women's Health Support



High interest in AI, but consumers are held back by one trust question: *is it accurate?*

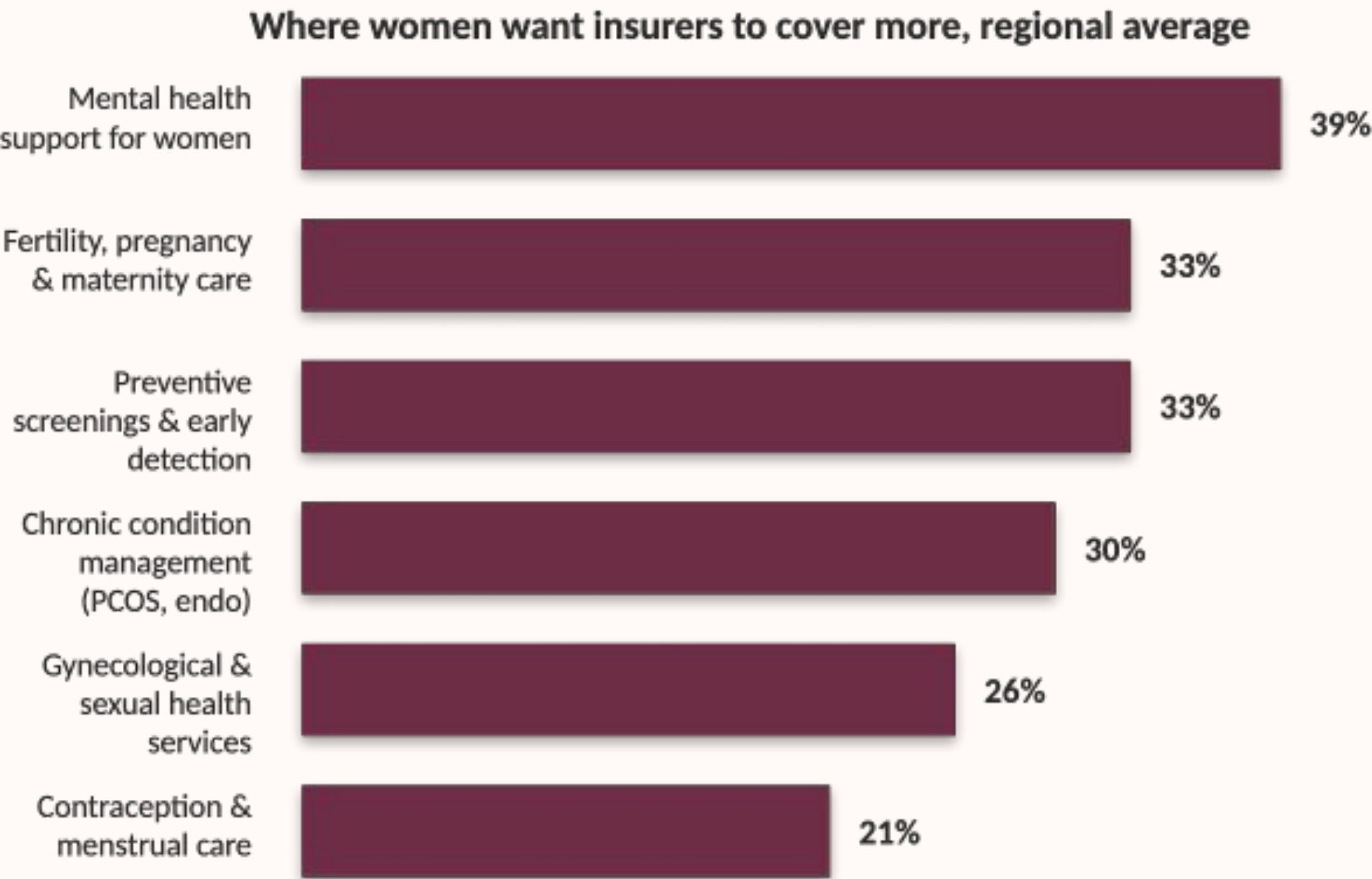
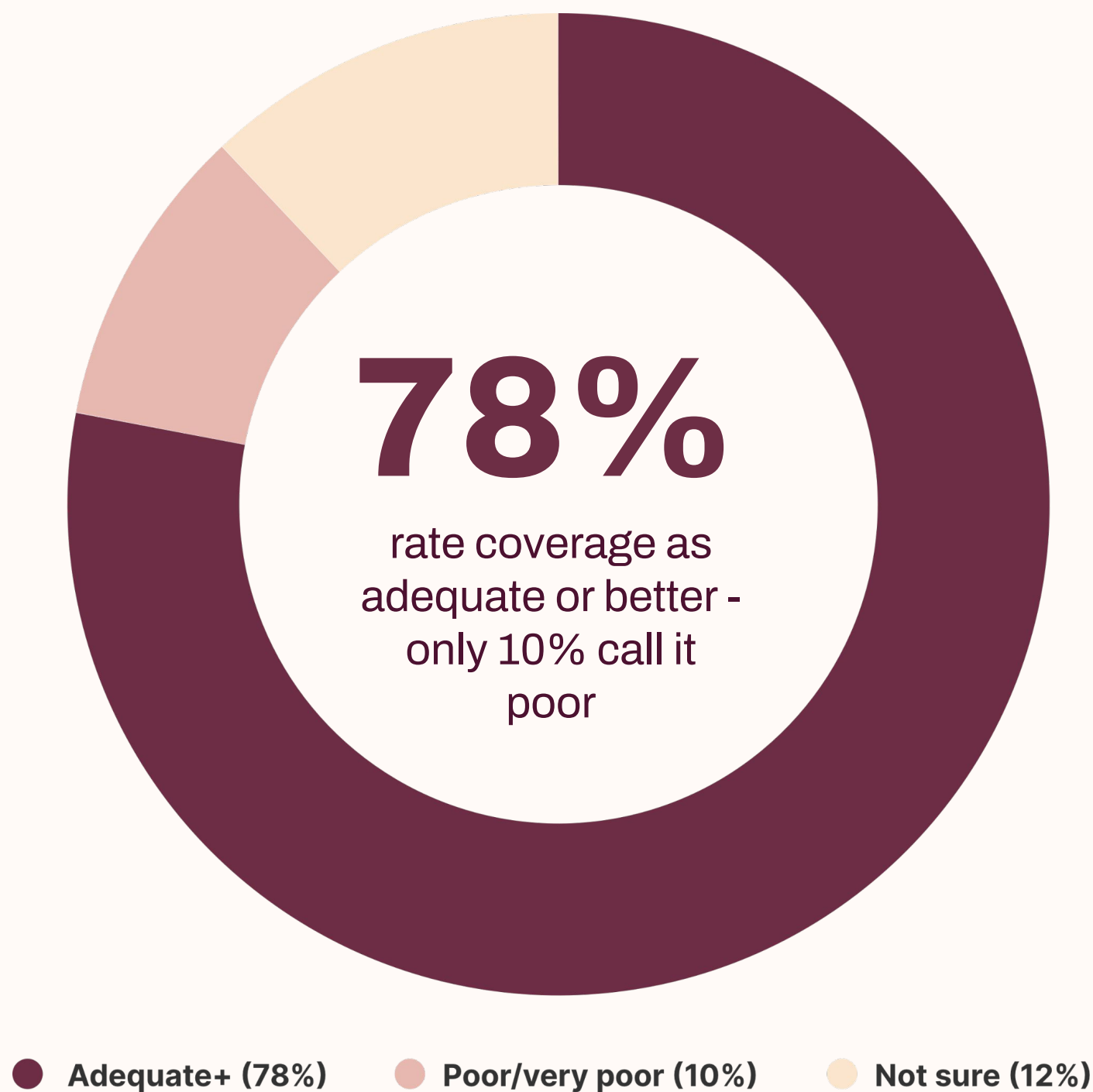
Willingness to use AI for women's health needs vs. concerns, Southeast Asia, 2026



2026 insight: 78% of women are open to at least one AI health use case, led by early detection and risk screening (33%) — but accuracy (40%) and privacy (38%) are the two proof points femtech and health brands need to earn before that interest converts to use.

Coverage is workable, but mental health is the clear gap

Health insurance adequacy and coverage gaps for women's health, Southeast Asia, 2026



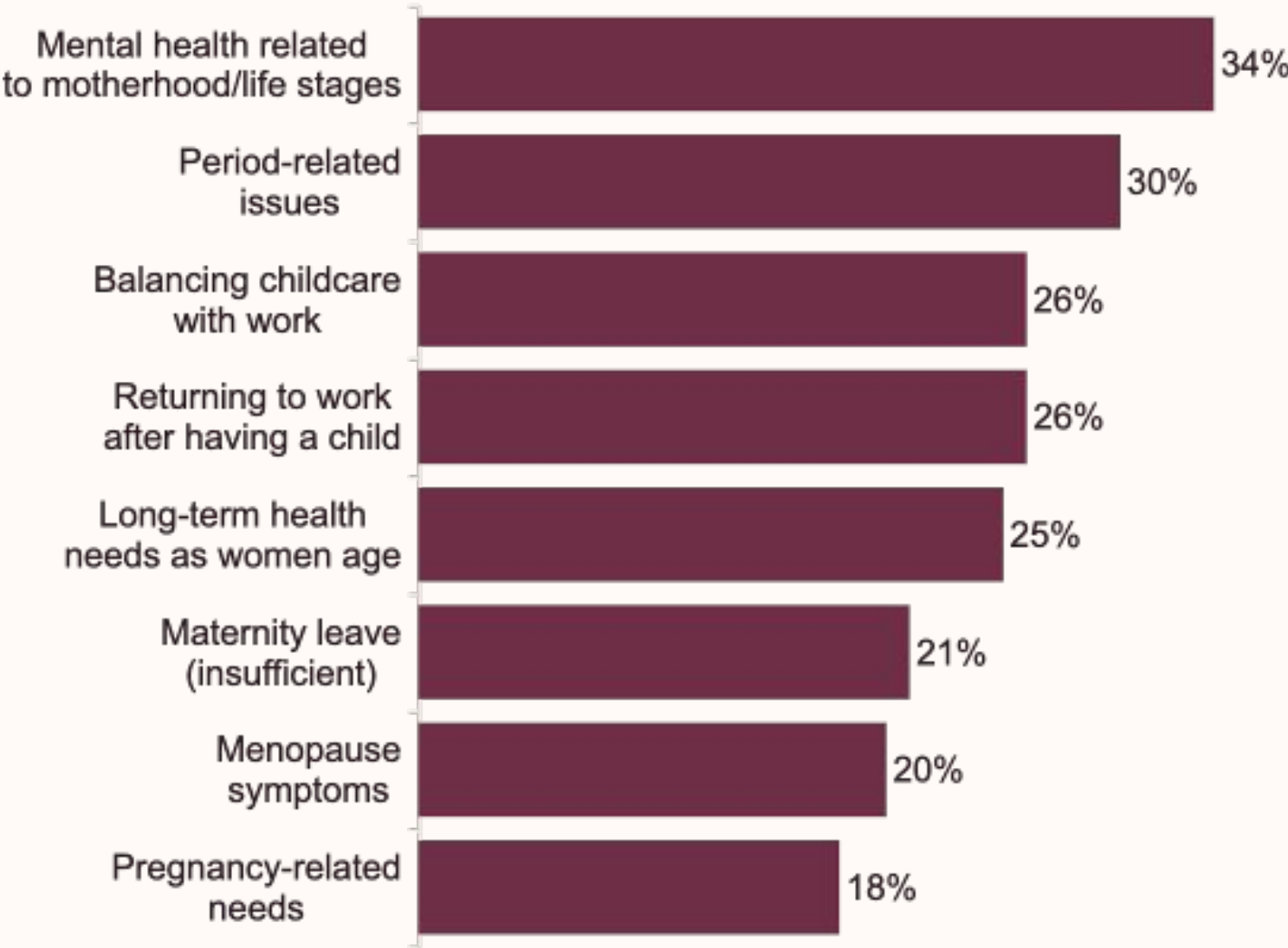
2026 insight: Insurance isn't broken for most women, but it's not built around them either — mental health support (39%) outranks even fertility and chronic condition coverage as the gap they most want closed.

Women know the fix: flexibility

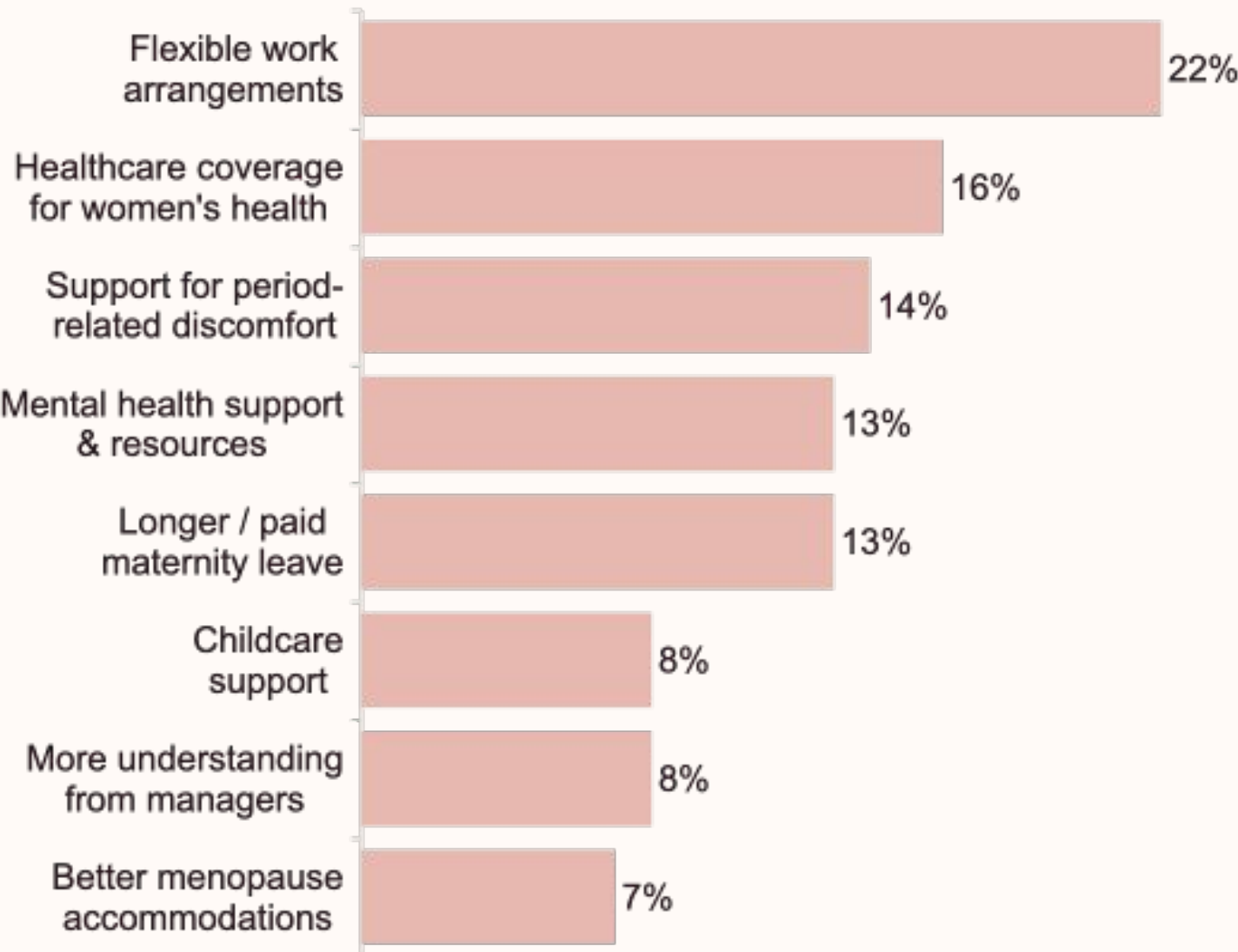
Mental health support lags furthest behind

Workplace support for women's health needs, Southeast Asia, 2026

LEAST SUPPORTED IN THE WORKPLACE
(Select up to 3)



THE ONE FIX WITH THE BIGGEST IMPACT
(Single choice)





Did you know?

Menopause support in the workplace

2026

- Very supportive - 18%
- Somewhat supportive - 48%
- Not very supportive - 19%
- Not supportive at all - 3%
- Unsure - 12%

2024

- Yes - 31%
- No - 31%
- Unsure - 38%

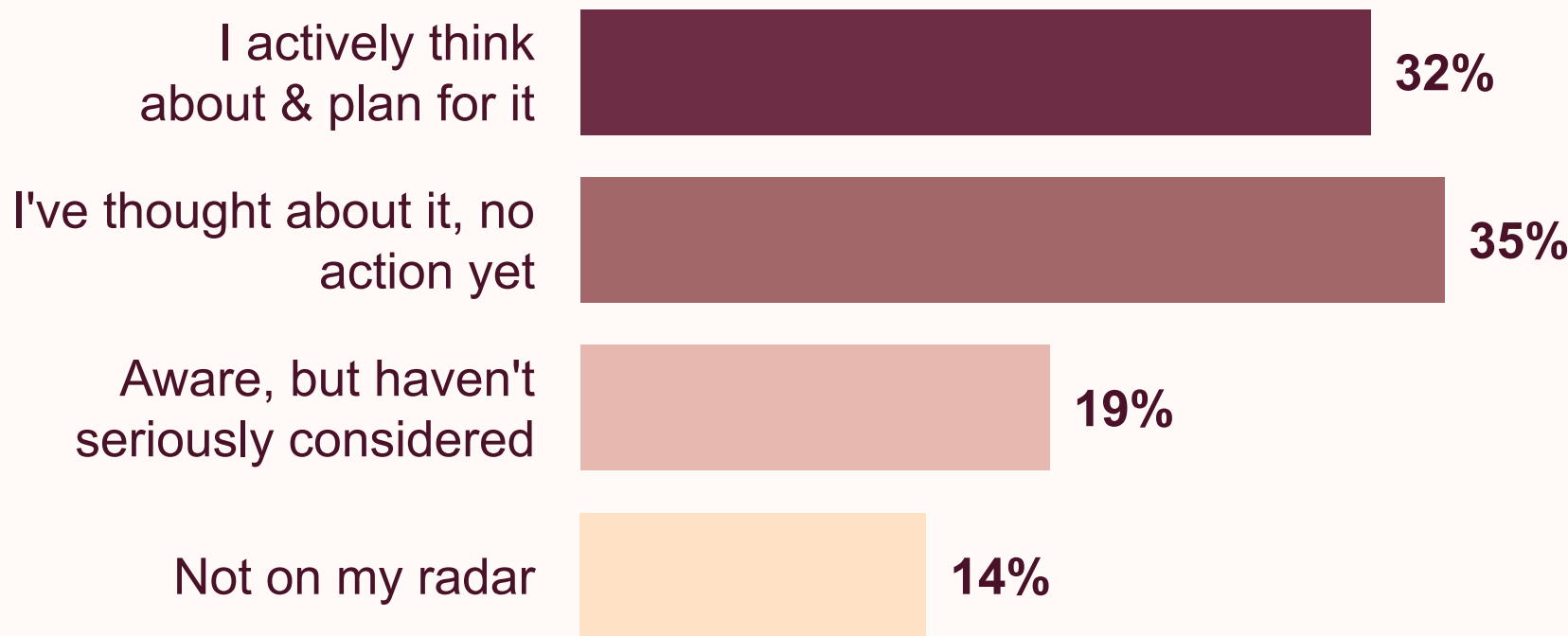


2026 insight: The single most-wanted fix, flexible work arrangements (22%), is a policy lever companies can pull today — but it won't close the region's biggest gap: support for mental health tied to motherhood and life stages (34%), which needs its own dedicated investment.

Longevity Is Trending, But Planning Lags Behind

Proactivity About Healthspan

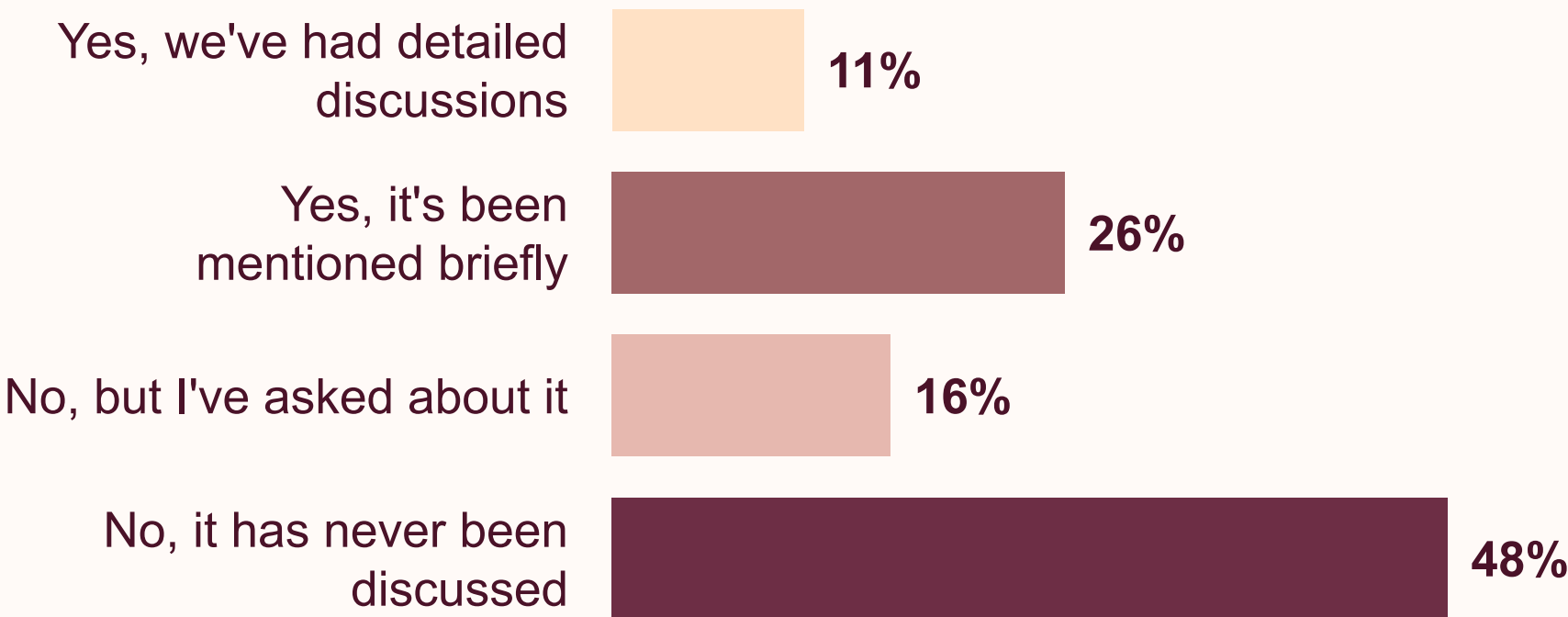
“How much have you thought about or planned for maintaining your healthspan as you age?”



Base: All respondents, n = 6,000 (2026)

Discussed Longevity With a Doctor?

“Have you ever discussed ‘healthspan’ or longevity planning with a healthcare provider?”



“Healthspan” = the number of years you live in good health, free from chronic disease or disability.

Key takeaway: Only 1 in 3 women is actively planning for their long-term health, and nearly half have never raised longevity with a healthcare provider — a clear gap between rising interest in the topic and real conversations or action.

FemTech Association Asia is the gateway to the femtech industry in Asia as the region's first and largest industry network with the core focus on improving women's health through technology solutions. This award-winning organisation currently represents 80+ femtech companies across 10 countries in Asia, and continues to grow through the pillars of advisory, thought leadership, programming, amplification and community-building.

The mission of FemTech Association Asia is to drive collaboration within Asia's femtech & women's health industry to accelerate the creation of more healthcare solutions with the ultimate vision of available, accessible and affordable healthcare for every woman at each stage of life.

Visit www.femtechassociation.com or email: info@femtechassociation.com for more information.



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