

# Indonesia Pharmaceuticals and Healthcare Report Q3 2016

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## Abstracts

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**BMI View:** The Indonesian medical landscape will see a larger presence of private healthcare providers over medium term. Underpinning this expansion is the robust prospects for the industry, with the introduction of a Coordination of Benefits scheme allowing patients to supplement their coverage under the universal healthcare programme with private insurance. In addition, private firms will be able to fill the gap in Indonesia's medical system which continues to suffer from the uneven distribution of resources. For pharmaceutical firms, this has the potential to facilitate a shift in patient flow away from public hospitals, which will require companies to adapt their marketing strategies.

### Headline Expenditure Projections

Pharmaceuticals: IDR77.6trn (USD5.8bn) in 2015 to IDR85.6trn (USD6.0bn) in 2016; +10.2% growth in local currency terms and +3.3% in US dollar terms.

Healthcare: IDR328.1trn (USD24.5bn) in 2015 to IDR358.6trn (USD25.1bn) in 2016; +9.3% growth in local currency terms and +2.4% in US dollar terms.

Forecast revised after new data from World Health Organization.

## Contents

### BMI Industry View

Table: Headline Pharmaceuticals & Healthcare Forecasts (Indonesia 2014-2020)

### SWOT

### Industry Forecast

### Pharmaceutical Market Forecast

Table: Pharmaceutical Sales, Historical Data And Forecasts (Indonesia 2012-2020)

### Healthcare Market Forecast

Table: Healthcare Expenditure Trends, Historical Data And Forecasts (Indonesia 2012-2020)

Table: Government Healthcare Expenditure Trends, Historical Data And Forecasts (Indonesia 2012-2020)

Table: Private Healthcare Expenditure Trends, Historical Data And Forecasts (Indonesia 2012-2020)

### Prescription Drug Market Forecast

Table: Prescription Drug Market Indicators, Historical Data And Forecasts (Indonesia 2012-2020)

### Patented Drug Market Forecast

Table: Patented Drug Market Indicators, Historical Data And Forecasts (Indonesia 2012-2020)

### Generic Drug Market Forecast

Table: Generic Drug Market Indicators, Historical Data And Forecasts (Indonesia 2012-2020)

### OTC Medicine Market Forecast

Table: Over-The-Counter (OTC) Medicine Market Indicators, Historical Data And Forecasts (Indonesia 2012-2020)

### Pharmaceutical Trade Forecast

Table: Pharmaceutical Trade Data And Forecasts (Indonesia 2014-2020)

Table: Pharmaceutical Trade Data And Forecasts local currency (Indonesia 2014-2020)

### Industry Risk/Reward Index

### Asia Pacific Risk/Reward Index - Q3 2016

### Indonesia Risk/Reward Index

### Rewards

### Risks

### Regulatory Review

### Intellectual Property Issues

### Halal Medicine Regulations

Labelling Requirements

Compulsory Licensing

Counterfeit Drugs

Generic Drug Legislation

Pricing Regime

Reimbursement Regime

Industry Trends And Developments

Market Overview

Table: UN Millennium Development Goals For Indonesia

Healthcare System

Table: Healthcare Resources (Indonesia 2010-2015)

Table: Healthcare Personnel (Indonesia 2010-2015)

Table: Healthcare Activity (Indonesia 2010-2015)

Research & Development

Clinical Trials

Epidemiology

Table: Estimated Number Of New Cases Of Cancer In Indonesia

Competitive Landscape

Research-Based Industry

Table: Selected List Of Pharmaceutical Business Areas With Restricted Conditions

Table: Multinational Market Activity

Generic Drugmakers

Pharmaceutical Wholesale

Pharmaceutical Retail

Company Profile

Bayer

Darya-Varia Group

GlaxoSmithKline

Indopharma

Kimia Farma

Merck & Co

Merck Group

Novartis

Pfizer

PT Biofarma

PT Kalbe Farma

Sanofi

Soho Group

Demographic Forecast

## Demographic Outlook

Table: Population Headline Indicators (Indonesia 1990-2025)

Table: Key Population Ratios (Indonesia 1990-2025)

Table: Urban/Rural Population & Life Expectancy (Indonesia 1990-2025)

Table: Population By Age Group (Indonesia 1990-2025)

Table: Population By Age Group % (Indonesia 1990-2025)

## Glossary

## Methodology

Pharmaceutical Expenditure Forecast Model

Healthcare Expenditure Forecast Model

Notes On Methodology

Risk/Reward Index Methodology

## Index Overview

Table: Pharmaceutical Risk/Reward Index Indicators

Indicator Weightings

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