

Indonesia Syringe Market - Strategic Insights and Forecasts (2026-2031)

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Abstracts

The Indonesia Syringe market is forecast to grow at a CAGR of 5.6%, reaching USD 305.8 million in 2031 from USD 232.8 million in 2026.

The Indonesia syringe market is expanding steadily, driven by a confluence of demographic growth, rising chronic disease prevalence, accelerating healthcare infrastructure investment, and a national policy commitment to universal health coverage. As one of Southeast Asia's largest and most populous economies, Indonesia presents a substantial and growing demand base for injectable drug delivery systems across hospital, clinic, and community health settings. The market is undergoing a structural shift toward prefilled, Auto-Disable, and safety-engineered syringe formats, reflecting both regulatory direction and evolving clinical standards. A strengthening domestic manufacturing base, alongside the continued presence of established multinational medical device companies, shapes a moderately fragmented and competitive supply landscape.

Market Drivers

Indonesia's aging population is a primary structural driver of syringe demand. The population aged 65 and above grew from 18.559 million in 2021 to 19.459 million in 2023, with the total population expected to reach 286.1 million by end-2025. Aging directly correlates with rising incidence of chronic non-communicable diseases including diabetes, cardiovascular disease, cancer, hypertension, and respiratory conditions, all of which require routine injectable medication administration. Indonesia holds the fifth-highest number of adults with diabetes globally, with 20.4 million cases recorded in 2024 according to the International Diabetes Federation. Diabetes prevalence among adults aged 20 to 79 is projected to rise from 19,465 per thousand in 2021 to 28,570 per

thousand by 2045, sustaining long-term structural demand for insulin syringes.

Rapid expansion of the healthcare sector reinforces market growth. Indonesia's national health insurance scheme, Jaminan Kesehatan Nasional, covered over 79% of the population by 2024, substantially increasing formal healthcare utilization and associated consumption of medical devices. Local healthcare production grew from USD 2,331 million in 2021 to USD 2,808 million in 2023. Government-backed multilateral financing partnerships with the World Bank, Asian Infrastructure Investment Bank, Asian Development Bank, and Islamic Development Bank, totaling USD 3.996 billion, are supporting a comprehensive Health System Strengthening project that will expand facility capacity, increase patient throughput, and drive syringe consumption volumes across the healthcare system.

The growing shift toward prefilled syringes, driven by the expansion of biologics and self-injection therapies, is elevating average unit values and diversifying the product mix. In December 2022, Gan and Lee Pharmaceuticals partnered with an Indonesian pharmaceutical company to introduce locally filled insulin glargine and insulin aspart prefilled pen formats, reflecting the commercial trajectory of advanced delivery systems in the market.

Market Restraints

Uneven healthcare access across Indonesia's archipelagic geography remains a meaningful constraint. Despite national insurance coverage expansion, physical access to modern healthcare facilities is limited in rural and remote regions due to insufficient hospital and clinic density, low health literacy, and administrative barriers within government-sponsored healthcare programs. Significant segments of the population continue to rely on traditional medicine as a primary care modality, limiting syringe consumption in underserved areas. These structural access gaps dampen the full market potential that demographic and disease burden indicators would otherwise suggest.

Technology and Segment Insights

The insulin syringe segment is experiencing strong demand growth, directly linked to Indonesia's surging diabetes caseload. The segment's expansion is further supported by new product introductions in prefilled and pen-compatible insulin delivery formats. Conventional syringes, including Luer lock, catheter tip, and eccentric tip variants, serve the broadest clinical application base across hospital procedures, diagnostic blood

collection, and therapeutic injections. Auto-Disable syringes are gaining institutional procurement priority, driven by government mandates aimed at eliminating syringe reuse and reducing needlestick-related infection risk in clinical settings. By material, plastic syringes dominate volume, while glass prefillable syringes are growing in relevance for biologic and vaccine applications. In September 2024, BD commercially launched the Neopak XtraFlow Glass Prefillable Syringe, designed for high-viscosity biologic drugs, reinforcing the premium segment's development trajectory. The October 2024 BPOM approval of SK Bioscience's SKYCellflu quadrivalent cell-cultured influenza vaccine for the Indonesian market also signals growth in the prefilled vaccine delivery segment.

Competitive and Strategic Outlook

The market features a dual-tier competitive structure comprising domestic manufacturers and multinational medical device companies. PT Oneject Indonesia is among the country's largest domestic syringe manufacturers and a pioneer in Auto-Disable syringe production, holding a strategically important position in government and public health procurement. PT Becton Dickinson Indonesia and PT Nipro Indonesia Jaya serve as local subsidiaries of global leaders, offering broad product portfolios with international quality assurance and regulatory approvals. PT Terumo Indonesia, B. Braun SE, and ICU Medical serve complementary clinical and hospital supply segments. Domestic manufacturers benefit from government preference for locally produced medical devices, while multinational players compete on product innovation, quality certification, and established relationships with large hospital groups and pharmaceutical partners.

Key Takeaways

The Indonesia syringe market is on a clear and well-supported growth trajectory through 2031, underpinned by demographic expansion, a rapidly growing chronic disease burden, government-led healthcare access programs, and the structural shift toward advanced syringe formats. Market participants that align product development with regulatory priorities, invest in local manufacturing capacity, and build distribution networks suited to Indonesia's diverse geography will be best positioned to capture the market's long-term commercial opportunity.

Key Benefits of this Report

Insightful Analysis: Gain detailed market insights across regions, customer

segments, policies, socio-economic factors, consumer preferences, and industry verticals.

Competitive Landscape: Understand strategic moves by key players to identify optimal market entry approaches.

Market Drivers and Future Trends: Assess major growth forces and emerging developments shaping the market.

Actionable Recommendations: Support strategic decisions to unlock new revenue streams.

Caters to a Wide Audience: Suitable for startups, research institutions, consultants, SMEs, and large enterprises.

What businesses use our reports for

Industry and market insights, opportunity assessment, product demand forecasting, market entry strategy, geographical expansion, capital investment decisions, regulatory analysis, new product development, and competitive intelligence.

Report Coverage

Historical data from 2021 to 2025 and forecast data from 2026 to 2031

Growth opportunities, challenges, supply chain outlook, regulatory framework, and trend analysis

Competitive positioning, strategies, and market share evaluation

Revenue growth and forecast assessment across segments and regions

Company profiling including strategies, products, financials, and key developments

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