

Indonesian Medical Equipment

WHAT'S INSIDE

In this initial edition of 2015, DGNEP introduces Indonesian medical equipment as one of prospective commodities. Its export performance has not been outstanding, yet the local industry show significant progress. Also, the implementation of ASEAN Economic Community provides more advantages to take.

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Indonesian Medical Equipment Industry:

Getting prepared to welcome ASEAN Economic Community

Dear Valued Readers,

Time flies. Here we are in 2015. The traffic in international trade has become more frequent with more exporters exist, more products and services are being offered, and obviously more challenges to deal with. Moreover, 2015 is the initial year for the implementation of the ASEAN Economic Community (AEC).

Practically, the AEC will commence in December 2015. In other words, we still have 11 months to go. In reality, however, 11 months might not be long enough to cope with the upcoming obstacles in a free ASEAN regional market. Thus, it is inevitable that all stakeholders have to prepare themselves by broadening their knowledge, increasing self-capacity, and always be enthusiast to gain updated information.

To address the new opportunities and challenges, the government of Indonesia has taken some efforts in order to welcome the AEC. For example, the government has enacted national trade regulations that do not conflict AEC regulations and standards. Furthermore, the government also intensifies cooperation with trade and industry associations. More importantly, the government also attempts to elevate the quantity and quality of local small and medium enterprises (SMEs) as the main beneficiaries in the AEC.

One of Indonesian commodities which has the potentials to be developed in overseas market is medical equipment. This sector is being discussed in the January edition of Export News so that readers can have a better information on Indonesian medical equipment industry, which has yet to become a leading sector. However, the industry's progress shows a sustainable development in accordance with the government's efforts to improve health services, and raise the public awareness to maintain their health individually. Hence, medical instruments for both personal and hospital usages have the potentials to move forwards.

With AEC implementation, the development of Indonesian medical equipment industry can be benefited from free tariff-barrier, and the opening of a larger market in ASEAN region. The regional market is more advantageous since the AEC determines health care as one of high-priority sectors to be dealt with. Shortly, with sufficient information and adequate preparation to embark into new markets, Indonesia is likely to dominate the ASEAN market for medical equipment and other commodities as well.

The Directorate General of National Export Development (DGNEDE) – Ministry of Trade of the Republic of Indonesia supports the development of Indonesian export by publishing this monthly Export News bulletin. As usual, this bulletin also includes a list of exporters and producers of medical equipment so that readers can directly contact them for fruitful and mutually beneficial deals.

Thank You

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hot issue

ASEAN Economic Community Opportunities and Challenges for Indonesian Medical Equipment Industry

One of the important moment in newly started 2015 is the implementation of the ASEAN Economic Community (AEC), in which all ASEAN countries have agreed to establish an integrated community

and eventually generate a region of prosperous and competitive ASEAN. Basically, AEC scheme is arranged to reduce the number of poverty and inequal economy between ASEAN countries.

There are four pillars in AEC implementation: (1) single market and production base, (2) competitive economic region, (3) equitable economic development, and (4) fully integrated region in the global economy. These pillars are set out to develop ASEAN economy and creating ASEAN countries as promising destinations for global investment. In other words, all ASEAN countries, including Indonesia, can take advantages from the realization of AEC in terms of developing national economy, enhancing international trade and driving foreign investment. By using a single regulation, the position of ASEAN countries will be strengthened and more capable to deal competitively in the global market. Under AEC scheme that will start in December 2015, all ASEAN countries are expected to gain more benefits to accelerate economic growths, social progress and cultural development. Business players from small and medium enterprises (SMEs) are designed to be the main beneficiaries in trade relations and cooperation in ASEAN. Therefore, building a "Think ASEAN" mindset prior to AEC implementation is important in order to maximally explore the ASEAN market and to become an outstanding player regionally. Hence, Indonesia may have a stronger foothold to make further steps in international markets.

The implementation of AEC will provide more opportunities for SMEs as the population of ASEAN is more than 600 million people with a growing number of middle-class people. According to the Asian Development Bank (ADB), this social class will reach 65% in 2030. Moreover, the elimination of tariff-barrier among ASEAN countries will also enlarge market potentials. Besides that, the concept of "production base" in AEC is also an opportunity for Indonesia to develop more industrial centers to meet higher demands in both domestic and regional markets.

However, there are also a number of challenges that Indonesia has to cope with. Since AEC scheme allows goods, services, investments and skilled workers to move freely, the competition in the regional markets become higher. Only the best will be the winner in the market. Therefore, Indonesian entrepreneurs have to take sufficient preparation. On the other

hand, the Indonesian government must also assist SMEs to produce better goods, provide better services and create workers with higher capacity.

Health Care Issue

Health care is one of important issues in human life. Only healthy people can carry out their plans and possibly achieve their goals. Therefore, the government should prioritize the development in health care system and services to create a healthy young generation.

In Indonesia, the development of medical equipment industry is not solely to boost export performance. It is also developed to maintain citizens' health. Thus, the manufacture of medical instrument is not only for hospital use but also for personal use. The development is conducted to improve health facilities in hospitals, and also to educate the public on how to prevent illnesses and disease and what to do when they happen. For example, when asthma attacks, it is important for the sufferers to know what to do immediately, before asking medical personnel for help. In this case, a person with asthma problem has to have a nebulizer in his or her possession.

Improvements in health care industry in ASEAN have resulted in successful inventions of medical treatment, including sophisticated technology for health care. Additionally, most cities in ASEAN are becoming busier, causing the people to have less time to take care of themselves. As a result, stress is getting widely recognized so it is important for governments to provide outstanding health services in order to increase productivity and quality of life.

Therefore, health care is placed as a high priority sector under AEC scheme. To elevate the health level of people in Southeast Asia, AEC has set a standardization and regulation which is governed in the ASEAN Medical Device Directive (AMDD). In summary, in order to win the competition in ASEAN markets, Indonesia must fulfill the standards required for exporting medical equipment. By following AMDD, it is expected that medical devices exported from Indonesia can improve patient safety standards in ASEAN region.



INDONESIAN Medical Equipment

Encouraging local industry
to enlarge overseas markets

Indonesian Medical Equipment Industry Profile

According to export product classification established by the Ministry of Trade of Republic of Indonesia, medical equipment is categorized as one of the country's 10 potential commodities. An Indonesian commodity is designated as a potential commodity when the export value is not significant, yet the local industry is growing significantly. Hence, the products have huge potentials to be developed in overseas markets. The primary export destinations for Indonesian medical equipment are Singapore, Germany, Japan, the United States, India, China, the Netherlands, Malaysia, Afghanistan, Thailand, Taiwan, Kenya, Iran, Canada, Hong Kong, France, Australia, East Timor, Saudi Arabia and the Philippines.

In accordance with the Indonesian government's effort to intensively improve public health service, the local demand for medical equipment is predicted to increase significantly. As the realization of the commitment to improve medical equipment industry for better health service, the Ministry of Health of Republic of Indonesia has enacted the Regulation of Health Minister No. 86/2013 titled "The Road Map of Medical Equipment Industry". This regulation, which was issued in August 2014, aims to ensure the industry will move forward as planned, and able to generate an integrated cooperation between stakeholders.

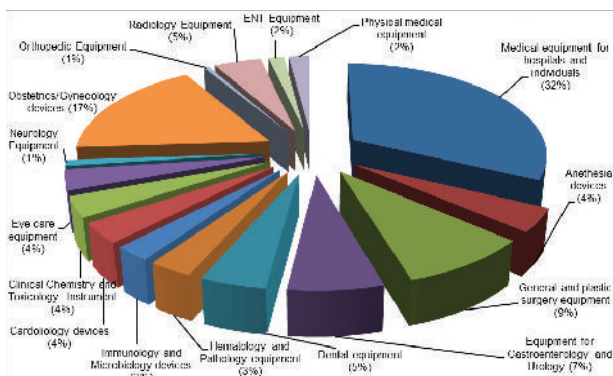
In order to intensify communications and interactions between stakeholders known by its acronym BARU (Business, Academics, Regulator and User), a working group has been created with the title the Task Force of the Development of Indonesian Medical Equipment facilitated by Ministry of Higher Education, Research and Technology. The task force has a vision to enhance

competitiveness and independency of medical equipment in Indonesia. The task force members comprises officials and representatives from key agencies such as the Ministry of Finance, the Ministry of Higher Education, Research and Technology which represents academics or universities, the Ministry of Trade, the Ministry of Health, the Ministry of Industry, Association of Indonesian Medical Equipment Companies and Laboratories (Gakeslab – *Gabungan Perusahaan Alat Kesehatan dan Laboratorium Indonesia*), Association of Indonesian Medical Equipment Producers (ASPAKI – *Asosiasi Produsen Alat Kesehatan Indonesia*), Indonesian Hospital Association (PERSI – *Persatuan Rumah Sakit Indonesia*) and Association of Provincial Hospital in Indonesia (ARSADA – *Asosiasi Rumah Sakit Daerah Seluruh Indonesia*).

The task force' role is to identify problems, propose solutions and remedies, and also submit recommendations regarding the solutions and make efforts to increase product competitiveness. In addition to competitiveness, the recommendations also should correlate with the independency of cross-sectoral medical equipment industry which covers research, development, modification, engineering, resources, industry, trade, standardization, regulation, control, incentive and other related sectors. In terms of research, the researchers must focus on market-oriented research, standardization, quality management, accreditation for examination institutes, individual certification agencies, also incentive and promotion activities which one of the roles of the Ministry of Trade.

Based on the results of a survey in 13 regencies and cities, there are 160 companies in Indonesia that produce medical equipment. Those companies are further classified into 16 types of medical equipment. Three major productions of medical equipment in Indonesia are medical equipment for hospitals and individuals; obstetrics and gynecology equipment; and surgical instrument either general or plastic surgery.

Classification of Indonesian Medical Companies (Based on production)



In the future, medical equipment industry in Indonesia is expected to become one of the mainstay industries as the foundation of Indonesian economy. Therefore, the government provides supports by facilitating various activities of research and development to elevate the quality of medical equipment from Indonesia. The medical equipment produced in Indonesia is marketed in both domestic and foreign markets. The Ministry of Trade is involved in the implementation of the Regulation of Health Minister No. 86/2013, titled “The Road Map of Medical Equipment Industry, in terms of trade activities locally and internationally. Particularly, the duty to increase export performance annually suits the current development agenda, which set out in “**Nawacita: 9 Priority Agendas**” at point No. 6 which aims to bring the people’s productivity forward and competitiveness in international market.

The growing number of hospitals or other health centers in Indonesia has led to the rising number of medical equipment industry. The growth in 2014 was approximately between 20-25%. On the other side, Indonesian export performance for medical equipment commodity also exhibited a positive trend. In 2009, the export value for this commodity was US\$197.52 million while the figure in 2013 jumped to US\$298.91 million, with a growth trend

of 9.35%. Meanwhile, the data from January to October 2014 showed that Indonesia’s export value was US\$ 231.23 million. The main export destination for Indonesian medical equipment in 2013 were Singapore, Germany, Japan, the United States, China, the Netherlands, India, Malaysia, Myanmar and Afghanistan.

For specific ASEAN market, Indonesia has gained 20% of market share in the region. Thus, in respond to AEC implementation in 2015, the Indonesian government and other stakeholders have prepared a set of strategies to anticipate the distribution of imported medical products from other ASEAN countries. The strategies include regulations and also reliable business practitioners to reduce imports and increase export performance.

Under AEC scheme, health and medical devices remains a high-priority sector. ASEAN country members have undertaken meetings and trainings to harmonize regulations related with health and medical devices. The harmonized regulation, the ASEAN Medical Device Directive (AMDD), functions to ensure that all ASEAN countries implement standardized medical device classification criteria and device placement system. Moreover, the AMDD was designed to improve access to medical technologies for ASEAN people. Therefore, in order to be successful in ASEAN and other global markets, Indonesia needs to harmonize its national regulations and standards with ASEAN ones.

**Indonesian Exports of Medical Equipment
Jan – Oct 2014
By Country of Destination**

Country	Value (US Dollar thousand)
Singapore	176.450
Germany	21.067
Japan	11.209
United States	8.295
China	2.907
Netherlands	2.251
India	1.206
Malaysia	819
Myanmar (formerly Burma)	667
Afghanistan	525

Source: BPS-Statistics Indonesia

World Market Opportunities for Medical Equipment

The world trade of medical equipment showed a significant progress each year from 2009-2013. The international market is dominated by the United States, Germany, the Netherlands, Belgium, Switzerland, Ireland, France, China, Japan and Mexico. By 2017, the total international trade is estimated to reach a value of US\$434,4 billion.

Medical equipment industry is likely to provide vast market opportunity for items that are pocket size, portable, intended for prevent illnesses and maintain an individual's health and also easy-access to the Internet. In other words, the items are designed

to be small, light, easy to use, comfortable and affordable. Some of medical devices that already have market potentials are disposable products (such as catheter, anti bacteria masks, PVC tubes, blood lines for HD and blood bags) and electro-medical equipment (including Doppler, ECG, USG, nebulizer, and oxygen concentrator to name a few). Not only for hospital use, medical equipment is also used personally such as wheelchair, patient aid/walker, sphygmomanometer, stethoscope, glucose meter, nebulizer, oxygenator and weighing scale.

A condition that needs to be taken into account is the consumers' shifting usage from conventional to more-sophisticated devices and instruments. Information technology base and patient empowering are two factors that are influential to the development of medical equipment. This shift makes it possible for patients to increase participation in their health care by utilizing information technology for medical devices.

No	Countries	Exported value (US Dollar thousand)				
		2009	2010	2011	2012	2013
	All Countries	136.015.053	149.914.400	165.576.287	170.935.053	177.930.803
1	United States of America	32.097.164	34.872.428	36.812.259	38.854.791	39.720.496
2	Germany	18.470.579	19.803.577	22.889.570	22.957.686	24.300.439
3	Netherlands	10.816.537	12.892.477	15.531.655	15.664.121	16.075.919
4	Belgium	6.277.021	7.122.123	8.219.340	8.477.548	10.009.601
5	Switzerland	8.138.946	8.494.860	9.546.644	9.295.227	9.832.388
6	Ireland	7.286.272	7.727.555	8.181.517	8.517.536	8.889.586
7	France	8.219.213	8.648.468	8.463.094	7.989.022	8.161.869
8	China	4.109.406	4.961.964	5.988.929	6.935.912	7.478.590
9	Japan	5.581.912	6.478.688	6.878.153	7.105.026	6.679.910
10	Mexico	4.577.813	5.191.877	5.445.538	5.606.141	6.015.709

Source: Trademap

The Future of Indonesian Medical Equipment Commodity

The competition in the world market of medical equipment has become fiercer. Since Indonesia has capable human resources and plenty of natural resources, the Indonesian government is optimistic to win the global competition. One of the efforts that has been taken was the participation of the Directorate General of National Export Development (DGNED) – Ministry of Trade of Republic of Indonesia, in the Saudi Health 2013. With the theme of “Preparing Today for a Healthy Tomorrow”, Indonesia drove investment by enhancing co-operations in pharmacy and medical equipment.

Furthermore, DGNED also participated in Africa Health 2014. The Director General of National Export Development, Nus Nuzulia Ishak, said that DGNED in cooperation with ASPAKI, the Indonesian Trade Promotion Center (ITPC) in Johannesburg and also the Indonesian Embassy in Pretoria, facilitated a number of Indonesian companies to take part in Africa Health last year. The Indonesian delegation also conducted one-on-one business meetings between Indonesian companies and buyers from South Africa and the neighboring countries such as Botswana, Namibia, Zimbabwe, the Kingdom of Lesotho, and the Kingdom of Swaziland. Thus, Nus explained, South Africa is a potential gate to enlarge Indonesia’s export market of medical equipment to targeted countries.



LIST OF EXPORTERS

CITOSE INDONESIA MANUFACTURING

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Fax : (62-22) 6031855
Email : export@chitose-indonesia.com,
jess@chitose-indonesia.com
Website : <http://www.chitose-indonesia.com>
Product : *Metal/Iron Furniture; Mattress Supports; Oth. Medical, Surgical, Dental or Veterinary Furniture*

CITRA MEDIKA LESTARI

Jl. Cempaka Putih Tengah No. 43 B,
Central Jakarta 10510 Indonesia
Phone : (62-21) 42802001, 4263088
Fax : (62-21) 4245418
Email : bambang_shima@citramel.co.id, citrane@indo.net.id
Website : <http://www.citramel.co.id>
Product : *Other Medical Instruments & Appliances; Oth. Medical, Surgical, Dental or Veterinary Furniture*

CONTINENTAL PANJI PRATAMA

Jl. Kayu Besar III No. 8, Tegal Alur, West Jakarta 11820 Indonesia
Phone : (62-21) 5552207
Fax : (62-21) 5552208
Email : cpp@president-luggage.com
Product : *Medical Bags/Cases*

DHARMA POLIMETAL

Jl. Raya Serang Km. 24, Balaraja,
Tangerang, Banten 15610 Indonesia
Phone : (62-21) 5951630 (Hunting)
Fax : (62-21) 5951564
Email : infodp@dharmap.com, info@dp.dharmap.com
Website : <http://www.dharmap.com>
Product : *Invalid Carriage Not Mechanically Propelled; Oth. Invalid Carriage; Parts & Access. of Invalid Carriage; Parts suitable for use solely or principally with the machinery of heading 84.27; Blood Pressure, Parts; Crutch of Medical Appliance; Oth. Medical, Surgical, Dental or Veterinary Furniture; Not mechanically propelled*

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Email : mak@cbn.net.id, marketing@mak-techno.com, yogya@mak-techno.com, export@mak-techno.com
Website : <http://www.mak-techno.com>
Product : *Invalid Carriage Not Mechanically Propelled; Oth. Medical, Surgical, Dental or Veterinary Furniture*

TESENA INOVINDO

Jl. H. Jusin No. 43, Kel. Susukan Ciracas, Pasar Rebo
East Jakarta 13750 , Indonesia
Phone : (62-21) 8401325, 8412414, 87792140
Fax : (62-21) 87792140
Email : tesena88@yahoo.com, tesena@centrin.net.id
Website : <http://www.tesena.co.id>
Product : *Infant Incubator; Ultra-violet & Infra-red Ray Apparatus; Apparatus X-Ray for Medical, Surgical or Veterinary Uses (X-ray Tubes, Radiations, etc); Parts & Acc; Oth. Medical, Surgical, Dental or Veterinary Furniture*

TRIMITRA GARMEDINDO INTERBUANA

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West Java 40391 Indonesia
Phone : (62-22) 2787555
Fax : (62-22) 2787666
Email : info@trimed.co.id
Website : <http://www.trimed.co.id>
Product : *Plastic Product; Trunks suit-cases holsters containers bags boxes; Inst./appl. used in med./surg./dental/ veterinary sciences; Medical Bags/Cases*

SARANDI KARYA NUGRAHA

Ruko Tanjung Mas - Jl. Komplek Tanjung Mas Raya B1/31,
Tanjung Barat, South Jakarta 12530, Indonesia
Phone : (62-21) 78842435
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Email : info@sarandi.co.id
Website : <http://www.sarandi.co.id>
Product : *Oth. Medical, Surgical, Dental or Veterinary Furniture: Surgical Lamps*

SHIMA PRIMA UTAMA

Jl. Sebatok No. 76 A, Taman Kenten, Palembang
South Sumatera 30114, Indonesia
Phone : (62-711) 713229, 716654
Fax : (62-711) 713229, 720708
Email : support@shima-indonesia.com
Website : <http://www.shima-indonesia.com>
Product : *Oth. Medical, Surgical, Dental or Veterinary Furniture*

SUGIH INSTRUMENTO ABADI

Jl. Tembokan Rt 1/01, Ds. Cipeundeuy, Padalarang,
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Phone : (62-22) 6865318
Fax : (62-22) 6865315
Email : secretary@sugih.co.id, marketing@sugih.co.id
Website : <http://www.abnmedical.com>
Product : *Stethoscope; Medical Bags/Cases; Gauge Meter; Other Medical Instruments & Appliances*



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