

Indonesia Diabetes Care Device Market Segmented By Monitoring Devices (Self-monitoring Blood Glucose Devices {Glucometer Devices, Test Strips, Lancet}, Continuous Blood Glucose Monitoring {Sensor, Durables}), By Management Devices (Insulin Pump {Insulin Pump Device, Insulin Pump Reservoir, Infusion Set}, Insulin Syringe, Insulin Cartridges, Disposable Pens), By Region, Competition, Forecast & Opportunities, 2019-2029F

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Report description:

Indonesia Diabetes Care Device Market was valued at USD 129.48 Million in 2023 and is anticipated to project steady growth in the forecast period with a CAGR of 5.02% through 2029. The diabetes care device market in Indonesia is experiencing steady growth, fueled by the rising prevalence of diabetes across the nation. With one of the highest diabetes rates in Southeast Asia, the increasing incidence of both Type 1 and Type 2 diabetes has created a pressing demand for effective monitoring and management solutions. This health challenge has positioned diabetes care devices as essential tools in the Indonesian healthcare landscape.

Awareness and education have played a significant role in driving market adoption. Efforts to inform the public about diabetes management have encouraged the use of devices such as blood glucose meters and continuous glucose monitors (CGMs). These tools empower patients to take control of their health through self-monitoring, a critical component in managing this chronic condition. The market has also benefited from rapid technological advancements. New innovations have resulted in user-friendly and efficient devices that improve patient compliance and health outcomes. Features like real-time glucose tracking and automated insulin delivery systems are becoming increasingly popular, offering enhanced convenience and accuracy for users. Government initiatives have further bolstered market growth. The Indonesian government has implemented programs aimed at

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raising awareness and improving access to diabetes care devices, particularly in underserved communities. These initiatives are helping to reduce barriers to care and expand the reach of diabetes management solutions.

Key Market Drivers

Rising Diabetes Prevalence

The Indonesia diabetes care device market is undergoing substantial growth, largely driven by the rising prevalence of diabetes. As one of the countries with the highest diabetes rates in Southeast Asia, Indonesia faces an escalating public health crisis. This has created an urgent need for advanced solutions to manage diabetes effectively, with multiple factors contributing to this trend. Urbanization has brought profound changes to the lifestyles of Indonesians. With rapid expansion of cities, dietary habits have shifted toward increased consumption of processed and fast foods, which are often high in sugars and unhealthy fats. This, coupled with a decline in physical activity, has significantly increased the risks of obesity and type 2 diabetes. Urban residents are particularly vulnerable due to limited opportunities for exercise and an over-reliance on convenience-based dietary options. These trends have been instrumental in driving diabetes prevalence across the country. Genetic predisposition remains a significant factor in the rising diabetes rates. Individuals with a family history of diabetes are inherently at a higher risk. When combined with environmental factors such as poor nutrition and lack of physical activity, the likelihood of developing diabetes increases substantially. This interplay between genetic and external influences presents unique challenges for prevention and management efforts, requiring tailored approaches to care. The aging population in Indonesia further contributes to the growing diabetes burden. Advances in healthcare have extended life expectancy, resulting in a larger demographic reaching older age groups where the prevalence of diabetes is significantly higher. This has created a substantial demand for specialized diabetes management solutions tailored to meet the needs of elderly patients, a segment that continues to grow. Limited access to healthcare services in rural and underserved areas exacerbates the problem. Many individuals lack the means to receive timely diagnoses or implement effective treatment plans. This gap in healthcare infrastructure has led to numerous cases of undiagnosed or poorly managed diabetes. As a result, there is a heightened demand for accessible and user-friendly diabetes care devices that can empower patients in remote regions to manage their conditions independently.

Indonesia's obesity epidemic further complicates the diabetes landscape. Poor dietary habits, insufficient physical activity, and the availability of calorie-dense foods have led to a sharp increase in obesity rates. Since obesity is a significant risk factor for type 2 diabetes, addressing this issue is critical. However, while public health campaigns work to reduce obesity rates, the immediate demand for diabetes management tools continues to rise. The increasing prevalence of diabetes has driven demand for advanced care devices. The market includes products such as blood glucose meters, continuous glucose monitors (CGMs), insulin delivery systems, and related accessories. These tools are essential for helping patients monitor their blood sugar levels, follow treatment regimens, and mitigate complications. As the burden of diabetes grows, the market for these devices continues to expand. The Indonesia diabetes care device market is expected to grow robustly as it works to address the challenges posed by the rising diabetes prevalence. Manufacturers and healthcare providers have significant opportunities to introduce innovative solutions tailored to the local market. Affordable, user-friendly, and technologically advanced devices are key to improving diabetes outcomes and increasing patient adherence to care.

Technological Advancements

Technological innovation is revolutionizing the Indonesia diabetes care device market, creating a transformative shift in how diabetes is managed. These advancements have introduced more effective, user-friendly, and convenient solutions for individuals living with diabetes, enabling them to monitor and control their condition with greater precision and ease. The integration of technology into diabetes care has not only enhanced patient outcomes but also opened new avenues for market growth and product development. One of the most significant breakthroughs in diabetes management is the development of continuous glucose monitoring (CGM) systems. These devices use miniature sensors placed under the skin to provide real-time glucose readings, eliminating the need for frequent finger-stick tests. Recent advancements in CGM technology have improved the accuracy and reliability of these devices, offering users a more precise understanding of glucose fluctuations throughout the day. This real-time data enables individuals to make informed decisions about diet, exercise, and insulin dosing, ultimately improving glycemic control and reducing the risk of complications. The emergence of smart insulin pens represents another leap forward in diabetes care. These advanced devices are designed to deliver insulin doses with greater accuracy while integrating seamlessly with digital platforms. Many smart insulin pens are equipped with connectivity features that sync with mobile applications,

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allowing users to monitor insulin usage, track injection history, and receive dosing reminders. By reducing errors and improving adherence, smart insulin pens have become a valuable tool in effective diabetes management, particularly for those requiring insulin therapy. Mobile technology is playing an increasingly vital role in the Indonesia diabetes care device market. Smartphone applications now integrate with various diabetes devices, enabling users to track glucose levels, log meals, and set reminders for medications and lifestyle adjustments. These apps often include data analytics features that provide actionable insights and generate reports that can be shared with healthcare providers. This enhanced connectivity fosters better patient-provider collaboration, leading to personalized care plans and improved treatment outcomes.

The introduction of artificial pancreas systems, also known as closed-loop systems, marks a groundbreaking advancement in diabetes care. These systems combine CGM devices with insulin pumps to create an automated insulin delivery system. By continuously monitoring glucose levels and adjusting insulin doses in real-time, artificial pancreas systems alleviate the burden of constant monitoring and manual adjustments for users. This innovation not only improves glycemic control but also significantly reduces the risk of hyperglycemia and hypoglycemia, making it a promising solution for patients seeking greater convenience and peace of mind. Telemedicine has become an integral component of diabetes management in Indonesia, particularly in the wake of the global shift toward remote healthcare solutions. Through telemedicine platforms, individuals can consult with healthcare professionals, receive guidance on device usage, and adjust treatment plans without the need for in-person visits. This approach is especially valuable in rural or underserved areas where access to specialized care may be limited. The integration of telemedicine with diabetes care devices ensures continuity of care and supports more proactive management of the condition. Wearable technology, including smartwatches and fitness trackers, is increasingly incorporating features tailored to diabetes management. These devices now offer continuous glucose monitoring alongside traditional health metrics like heart rate and activity levels. By providing a holistic view of an individual's health, wearables enable users to better understand how lifestyle factors influence their glucose levels. This all-in-one approach to health monitoring aligns with the growing demand for convenient, multifunctional devices in the Indonesian market.

The interoperability of diabetes care devices and electronic health records (EHRs) is rapidly improving, making it easier for individuals to share data with their healthcare providers. This seamless integration ensures that care teams have access to comprehensive and up-to-date information, enabling more accurate diagnoses and personalized treatment plans. Improved data sharing capabilities also enhance patient engagement, as individuals can see the impact of their efforts in real-time and adjust their behaviors accordingly. As technological advancements continue to reshape the Indonesia diabetes care device market, the focus is shifting toward creating solutions that are both patient-centered and highly effective. Innovations such as artificial intelligence (AI) in data analysis, predictive analytics, and the miniaturization of devices are expected to drive future growth. These developments will further empower individuals with diabetes, helping them achieve better control over their condition while improving their quality of life.

Government Initiatives

The Indonesian government has played a critical role in shaping the diabetes care device market, recognizing the urgent need to address the country's growing diabetes epidemic. Through a series of targeted initiatives, the government has sought to improve diabetes prevention, diagnosis, and management, fostering a more supportive ecosystem for individuals living with the condition. These efforts have significantly influenced the demand for diabetes care devices while paving the way for future market growth. One of the cornerstone strategies implemented by the government has been the launch of widespread public awareness campaigns. These campaigns aim to educate the public on the importance of diabetes prevention, early detection, and effective management. By promoting healthier lifestyles, such as balanced diets and regular physical activity, these campaigns seek to curb the rising prevalence of diabetes. Additionally, they encourage individuals to undergo regular health check-ups, emphasizing the benefits of early diagnosis. These awareness initiatives have not only empowered individuals with knowledge but have also boosted the adoption of diabetes care devices, such as glucose monitors, by highlighting their role in disease management. The government has made significant investments in expanding and modernizing healthcare infrastructure, with a focus on ensuring accessibility in both urban and rural areas. By establishing more healthcare facilities and clinics, especially in underserved regions, the government has improved the availability of diagnostic and treatment services for diabetes. This expansion supports early diagnosis and timely intervention, creating a growing need for reliable diabetes care devices. Enhanced healthcare infrastructure also facilitates the integration of advanced technologies, such as continuous glucose monitors (CGMs) and insulin

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delivery systems, into routine diabetes care. To address the challenge of undiagnosed diabetes, the government has initiated large-scale diabetes screening programs in communities and healthcare centers. These programs focus on identifying individuals at risk or in the early stages of the disease, enabling timely intervention and effective management. Early detection not only helps prevent complications but also encourages the use of monitoring devices, such as blood glucose meters, for continuous self-management. These screening efforts have significantly contributed to the rising demand for diabetes care products in Indonesia.

Recognizing the financial burden diabetes can place on individuals, the government has introduced programs to subsidize healthcare costs for patients. These subsidies include financial assistance for diabetes medications, insulin, and essential care devices, making them more accessible to low-income populations. By reducing the economic barriers to diabetes management, these initiatives have fostered greater adoption of care devices, ensuring broader access across socio-economic groups. This affordability drives market growth while improving health outcomes for individuals. The government has prioritized the development of telehealth and telemedicine services as a way to enhance diabetes care, especially during the COVID-19 pandemic. By enabling remote consultations with healthcare professionals, these platforms reduce the need for in-person visits and make diabetes management more convenient. Patients can receive guidance on device usage, adjust treatment plans, and monitor their progress from the comfort of their homes. This initiative has also driven the adoption of connected diabetes devices, such as CGMs and smart insulin pens, which integrate seamlessly with telehealth systems. To maintain the quality and reliability of diabetes care devices, the government has developed a robust regulatory framework. This framework ensures that devices available in the market meet strict safety and efficacy standards, fostering consumer trust. A regulated market not only protects patients but also encourages manufacturers to innovate and comply with high-quality standards. The emphasis on safety has enhanced the reputation of diabetes care devices and driven their acceptance in the market.

Key Market Challenges

Lack of Access in Rural Areas

The Indonesia diabetes care device market faces a critical challenge in extending its reach to rural regions, where access to diabetes management tools remains limited. Several key factors contribute to this gap, underscoring the need for strategic interventions to bridge the divide and ensure equitable healthcare access. Indonesia's vast archipelago and geographically diverse terrain create significant logistical challenges for distributing healthcare resources, including diabetes care devices. Many remote and rural areas lack the transportation networks and infrastructure necessary for efficient delivery, leading to delays and uneven access to essential devices.

Healthcare facilities in rural regions are often under-resourced and ill-equipped to diagnose and manage diabetes effectively. The limited availability of diabetes care devices, combined with a shortage of trained personnel to guide patients, exacerbates the access problem, leaving many individuals without adequate support. Low levels of awareness about diabetes and its complications are prevalent in rural communities. This lack of knowledge leads to delayed diagnoses and inadequate management, as individuals remain unaware of the importance of monitoring and the role of diabetes care devices in maintaining health. Economic disparities further hinder access to diabetes care devices in rural areas. Many individuals prioritize basic necessities over health-related expenditures, particularly when they lack awareness of the long-term benefits of diabetes management tools. High upfront costs of devices and limited financial support exacerbate this issue. A critical shortage of healthcare professionals in rural areas limits the availability of specialized diabetes care. The lack of trained personnel reduces opportunities for patients to receive guidance on using diabetes care devices effectively, further compounding access challenge.

Healthcare Workforce Training

Workforce training is a pivotal factor in the success of the Indonesia diabetes care device market. It equips healthcare professionals with the technical knowledge and practical skills needed to utilize, recommend, and support the use of diabetes care devices effectively. Comprehensive training programs are vital for addressing various critical aspects of diabetes management, ultimately enhancing patient outcomes and driving the adoption of advanced care solutions. Healthcare professionals require specialized training to operate a wide range of diabetes care devices, including blood glucose meters, insulin pumps, and continuous glucose monitors (CGMs). Proficiency in device usage ensures that these tools are deployed accurately and efficiently, minimizing errors and maximizing their therapeutic potential.

Modern diabetes care devices generate extensive data, from real-time blood glucose levels to long-term trend analytics. Training

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programs prepare healthcare providers to interpret this data effectively, enabling them to make precise adjustments to treatment plans, medications, and lifestyle recommendations based on individual patient needs. Healthcare professionals serve as the primary educators for patients managing diabetes. Training enables them to provide clear, actionable guidance on device operation, self-monitoring techniques, and the importance of understanding device-generated data. This ensures that patients are equipped to manage their condition proactively and independently. Every patient's diabetes management needs are unique. Training empowers healthcare providers to create personalized care plans, incorporating specific device recommendations and monitoring schedules. These tailored approaches optimize disease management and improve patient adherence to prescribed regimens.

Key Market Trends

Telehealth Integration

The integration of telehealth is revolutionizing the Indonesia diabetes care device market by leveraging digital technology to enhance access, efficiency, and effectiveness in diabetes management. In a geographically expansive and diverse country like Indonesia, where specialized healthcare services are often concentrated in urban centers, telehealth serves as a bridge to deliver critical diabetes care to underserved populations. Telehealth platforms enable individuals with diabetes to consult remotely with healthcare professionals, including endocrinologists, diabetes educators, and dietitians. These virtual consultations reduce the need for time-consuming and costly travel to medical facilities, particularly for patients in rural and remote areas. The integration of continuous glucose monitors (CGMs) and other diabetes care devices with telehealth systems facilitates real-time monitoring. Patients can share their glucose data with healthcare providers, allowing timely interventions and personalized adjustments to treatment plans based on accurate, up-to-date information.

Telehealth platforms support precise medication management, including insulin dose adjustments. Through virtual consultations, healthcare providers can guide patients on optimal dosing strategies, reducing the risks associated with over- or under-dosing and ensuring better glycemic control. Telehealth solutions provide comprehensive educational resources to patients, covering topics such as dietary planning, physical activity, and lifestyle modifications. These resources empower individuals to make informed decisions about their diabetes management, improving adherence and outcomes. Patients benefit from remote training sessions on the proper use of diabetes care devices. Healthcare professionals can demonstrate device operation, troubleshooting, and data interpretation through telehealth platforms, ensuring patients are confident in self-monitoring and management.

Wearable Diabetes Devices

Wearable diabetes devices are transforming diabetes management in Indonesia, offering patients innovative tools that provide convenience, real-time data, and proactive solutions for controlling their condition. These devices, designed to be worn on the body, empower users with critical insights and enhanced control, making them a cornerstone of modern diabetes care. Continuous glucose monitors represent a breakthrough in wearable diabetes technology. These devices use a sensor placed beneath the skin to provide continuous, real-time glucose readings. By tracking glucose trends throughout the day and night, CGMs allow users to identify fluctuations and act promptly to prevent episodes of hypoglycemia or hyperglycemia. This technology has become essential for individuals seeking precise, data-driven diabetes management. Insulin pumps have redefined insulin delivery by providing a wearable solution for precise, continuous administration. Through programmable basal and bolus dose settings, insulin pumps enable users to customize their insulin delivery based on specific needs, such as meal timing or physical activity. These devices offer unparalleled flexibility and control, significantly enhancing the quality of life for patients requiring insulin therapy. The integration of health monitoring features into smartwatches and fitness trackers has brought diabetes management into the mainstream of wearable technology. These devices track glucose levels, physical activity, and even sleep patterns, offering a holistic view of health that supports better overall management of diabetes. Mobile applications compatible with wearable diabetes devices further enhance their functionality. These apps enable users to log meals, track insulin dosing, and analyze trends in their glucose levels. Many also provide actionable insights, allowing users to identify patterns and make informed decisions to optimize their diabetes care. Wearable devices seamlessly integrate with telehealth platforms, enabling remote monitoring by healthcare providers. This connectivity allows medical professionals to track patient adherence to treatment plans, identify potential issues, and intervene promptly with personalized adjustments.

Segmental Insights

Monitoring Devices Insights

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In 2023, the Self-Monitoring Blood Glucose (SMBG) Devices segment currently dominates the Indonesia Diabetes Care Device Market and is projected to maintain its growth trajectory in the coming years. This segment has gained significant traction due to its crucial role in enabling individuals with diabetes to independently monitor their blood glucose levels at home. As the prevalence of diabetes continues to rise in Indonesia, the demand for these devices is expected to increase, driven by a growing awareness of the importance of regular monitoring in diabetes management.

Several factors contribute to the sustained growth of the SMBG devices market. The rising incidence of both type 1 and type 2 diabetes in Indonesia has led to an increasing number of individuals seeking reliable and accessible tools for glucose monitoring. SMBG devices offer a convenient and cost-effective solution for patients to keep track of their blood sugar levels, helping them manage their condition more effectively. With advancements in technology, these devices are becoming more accurate, user-friendly, and portable, further driving adoption among patients.

Regional Insights

In 2023, the Bali region held the largest revenue share in the Indonesia Diabetes Care Device Market, a position driven by a combination of factors that underscore its prominence in the sector. One of the key contributors to this market dominance is Bali's advanced healthcare infrastructure, which plays a crucial role in facilitating access to cutting-edge diabetes care devices and services. The region has witnessed significant investment in healthcare facilities, which are equipped with modern technologies that support the effective management of diabetes. This robust infrastructure ensures that residents and visitors alike can benefit from a wide range of healthcare services, including timely access to the latest diabetes care devices.

Additionally, Bali benefits from a stringent regulatory environment that prioritizes patient safety and the quality of care. The government's strong regulatory framework ensures that diabetes care devices available in the market meet high standards of safety and efficacy. These regulations foster consumer confidence and contribute to the steady demand for medical devices. As the region continues to uphold these standards, the quality of diabetes care in Bali is continually improving, attracting both domestic and international patients seeking reliable treatment options.

Key Market Players

- PT. Becton, Dickinson Indonesia
- Medtronic
- Tandem
- Sanofi
- PT Eli Lilly Indonesia
- PT Abbott Indonesia
- Roche
- PT Johnson & Johnson Indonesia
- Dexcom, Inc.
- PT Novo Nordisk Indonesia

Report Scope:

In this report, the Indonesia Diabetes Care Device Market has been segmented into the following categories, in addition to the industry trends which have also been detailed below:

- Indonesia Diabetes Care Device Market, By Monitoring Devices:
 - o Self-monitoring Blood Glucose Devices
 - o Continuous Blood Glucose Monitoring
- Indonesia Diabetes Care Device Market, By Management Devices:
 - o Insulin Pump
 - o Insulin Syringe
 - o Insulin Cartridges
 - o Disposable Pens
- Indonesia Diabetes Care Device Market, By Region:
 - o Bali
 - o Java

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- o Kalimantan
- o Sumatra

Competitive Landscape

Company Profiles: Detailed analysis of the major companies present in the Indonesia Diabetes Care Device Market.

Available Customizations:

Indonesia Diabetes Care Device Market report with the given market data, TechSci Research offers customizations according to a company's specific needs. The following customization options are available for the report:

Company Information

- Detailed analysis and profiling of additional market players (up to five).

Table of Contents:

1. Product Overview
 - 1.1. Market Definition
 - 1.2. Scope of the Market
 - 1.2.1. Markets Covered
 - 1.2.2. Years Considered for Study
 - 1.2.3. Key Market Segmentations
2. Research Methodology
 - 2.1. Objective of the Study
 - 2.2. Baseline Methodology
 - 2.3. Key Industry Partners
 - 2.4. Major Association and Secondary Types
 - 2.5. Forecasting Methodology
 - 2.6. Data Triangulation & Validation
 - 2.7. Assumptions and Limitations
3. Executive Summary
 - 3.1. Overview of the Market
 - 3.2. Overview of Key Market Segmentations
 - 3.3. Overview of Key Market Players
 - 3.4. Overview of Key Regions/Countries
 - 3.5. Overview of Market Drivers, Challenges, and Trends
4. Voice of Customer
5. Indonesia Diabetes Care Device Market Outlook
 - 5.1. Market Size & Forecast
 - 5.1.1. By Value
 - 5.2. Market Share & Forecast
 - 5.2.1. By Monitoring Devices (Self-monitoring Blood Glucose Devices, Continuous Blood Glucose Monitoring)
 - 5.2.1.1. By Self-monitoring Blood Glucose Devices (Glucometer Devices, Test Strips, Lancet)
 - 5.2.1.2. By Continuous Blood Glucose Monitoring (Sensor, Durables)
 - 5.2.2. By Management Devices (Insulin Pump, Insulin Syringe, Insulin Cartridges, Disposable Pens)
 - 5.2.2.1. By Insulin Pump (Insulin Pump Device, Insulin Pump Reservoir, Infusion Set)
 - 5.2.3. By Region (Bali, Java, Kalimantan, Sumatra)
 - 5.2.4. By Company (2022)
 - 5.3. Market Map
6. Bali Diabetes Care Device Market Outlook
 - 6.1. Market Size & Forecast
 - 6.1.1. By Value

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- 6.2. Market Share & Forecast
 - 6.2.1. By Monitoring Devices
 - 6.2.2. By Management Devices
- 7. Java Diabetes Care Device Market Outlook
 - 7.1. Market Size & Forecast
 - 7.1.1. By Value
 - 7.2. Market Share & Forecast
 - 7.2.1. By Monitoring Devices
 - 7.2.2. By Management Devices
- 8. Kalimantan Diabetes Care Device Market Outlook
 - 8.1. Market Size & Forecast
 - 8.1.1. By Value
 - 8.2. Market Share & Forecast
 - 8.2.1. By Monitoring Devices
 - 8.2.2. By Management Devices
- 9. Sumatra Diabetes Care Device Market Outlook
 - 9.1. Market Size & Forecast
 - 9.1.1. By Value
 - 9.2. Market Share & Forecast
 - 9.2.1. By Monitoring Devices
 - 9.2.2. By Management Devices
- 10. Market Dynamics
 - 10.1. Drivers
 - 10.2. Challenges
- 11. Market Trends & Developments
 - 11.1. Merger & Acquisition
 - 11.2. Product Development
 - 11.3. Recent Developments
- 12. Policy & Regulatory Landscape
- 13. Indonesia Economic Profile
- 14. Competitive Landscape
 - 14.1. PT. Becton, Dickinson Indonesia
 - 14.1.1. Business Overview
 - 14.1.2. Product & Service Offerings
 - 14.1.3. Recent Developments
 - 14.1.4. Key Personnel
 - 14.1.5. Financials (If Listed)
 - 14.1.6. SWOT Analysis
 - 14.2. Medtronic
 - 14.3. Tandem
 - 14.4. Sanofi
 - 14.5. PT Eli Lilly Indonesia
 - 14.6. PT Abbott Indonesia
 - 14.7. Roche
 - 14.8. PT Johnson & Johnson Indonesia
 - 14.9. Dexcom, Inc.
 - 14.10. PT Novo Nordisk Indonesia

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15. Strategic Recommendations
16. About Us & Disclaimer

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