



VACCINE
WORLD ASIA CONGRESS 2026
South East Asia

BIOLOGICS
WORLD
SOUTH EAST
ASIA 2026

WHY INDONESIA IS THE NEXT GROWTH MARKET FOR VACCINES & BIOLOGICS IN SEA



1

One of the Largest and Fastest-Growing Healthcare Markets in South East Asia

With a population of over **270 million**, Indonesia has one of the largest vaccine demand bases globally, driven by national immunisation programs and expanding healthcare access.

Example:

- ▶ Indonesia's **routine national immunisation programme** covers millions of children annually, creating sustained demand for vaccines such as DTP, measles, and polio
- ▶ During COVID-19, Indonesia became one of the **largest vaccine deployment markets globally**, demonstrating its scale and infrastructure readiness

What this means:

Companies entering Indonesia are tapping into **high volume, long term demand**.

2

Strong Government Push for Local Manufacturing & Self-Sufficiency

Indonesia is actively reducing reliance on imports by strengthening **domestic vaccine and biologics production capabilities**.

Example:

- ▶ **Bio Farma** plays a central role as a state-owned vaccine manufacturer supplying both domestic and international markets
- ▶ Indonesia has been actively promoting technology **transfer partnerships** to build local fill-finish and manufacturing capabilities

What this means:

Opportunities for:

- CDMOs
- Equipment providers
- Bioprocessing & manufacturing tech companies

3

Increasing Foreign Investment Accelerating Biologics Growth

Indonesia is attracting growing interest from **international biopharma companies**, particularly from North Asia, as they look to expand manufacturing and establish a presence in Southeast Asia.

This influx of foreign investment is accelerating the development of **local biologics capabilities, technology transfer, and manufacturing infrastructure**.

Example:



South Korean companies such as **Daewoong Pharmaceutical** and **CKD Pharma** have established operations in Indonesia to expand their biologics and pharmaceutical footprint



Chinese vaccine and biotech players such as **Sinovac** have collaborated with Indonesia during COVID-19, supporting vaccine supply and local capabilities



China-based companies like **Walvax Biotechnology** are actively expanding internationally, with Southeast Asia (including Indonesia) as a key target market for partnerships and market entry



These investments focus on:

- Local manufacturing
- Biosimilars and biologics production
- Strategic partnerships with Indonesian players

What this means:

- Indonesia is becoming a **preferred expansion market for global and regional biopharma players**
- Increased opportunities for:
 - Joint ventures
 - Technology transfer
 - Contract manufacturing partnerships

Foreign investment is not just entering the market, it is actively **shaping Indonesia's biologics ecosystem**.

4

Rapid Evolution Towards Advanced Biologics & Next-Gen Therapies

Indonesia is moving beyond traditional vaccines into **higher-value biologics and innovation-driven therapeutics**.

Example:



Local companies such as **Kalbe Farma and its biologics arm (KGbio)** are investing in **biosimilars and monoclonal antibodies**



Increasing interest in **cell & gene therapy readiness** across APAC is influencing Indonesia's long-term direction

What this means:

Early entrants can:

- Capture first-mover advantage
- Shape the future biologics landscape in Indonesia

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