

# Indonesia's Pharmaceutical Cold Storage Market Gathers Momentum with 8.78% Export Surge and Vaccine Storage Demand

*Indonesia sees strong growth in pharma cold storage, driven by an 8.78% export rise, vaccine storage demand, and increased foreign investments*

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[Indonesia's pharmaceutical cold storage market](#) is witnessing robust growth fueled by increased pharmaceutical exports, expanded warehousing infrastructure, and

favorable foreign investment policies. According to a recent study by Makreo Research, Indonesia is emerging as a key regional hub for temperature-sensitive pharmaceutical logistics.

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The surge in pharma exports and rising cold storage demand reflect Indonesia's growing role in regional pharmaceutical logistics and the need for robust cold chain infrastructure.”

*Ruchika Rana*



In 2023 alone, Indonesia's pharmaceutical exports rose by 8.78%, primarily directed towards the Philippines, India, Japan, Singapore, and Nigeria. These exports encompass both chemical and traditional medicines and underline the increasing importance of efficient cold storage systems to maintain product integrity throughout the supply chain.

**Indonesia's Pharma Companies Leading Cold Chain Operations -**

Indonesia's pharmaceutical companies are at the forefront of managing their distribution networks, including cold chains and cold storage solutions specifically for

temperature-sensitive products. Most companies operate insulated vehicles and smaller containers to preserve cold temperatures during transit. Due to the specialized nature of distribution, leading pharmaceutical manufacturers such as PT Kalbe Farma, PT Kimia Farma, PT Bio Farma, and PT Pharos have formed subsidiary arms dedicated to distribution logistics.

## Foreign Investment Drivers in Indonesia's Pharmaceutical Sector -

- Growing Prospects in API and Raw Material Production

Despite having 241 drug manufacturers (2021), only 17 produce pharmaceutical raw materials. This reliance on imports for APIs highlights a strategic gap—creating strong investment potential for global firms in raw material and API production.

- Simplified Licensing through Digital Platforms

Indonesia's OSS platform, managed by BKPM, now enables pharma and medical firms to secure licenses within 24 hours. This digital overhaul accelerates operations and eases entry into regulated sectors, addressing pandemic-era supply chain challenges.

- Open to 100% Foreign Ownership

The government's Positive Investment List allows full foreign ownership in key pharmaceutical segments, encouraging integrated investments in production and cold storage supporting growth across the Indonesia pharmaceuticals cold storage market.

- Vaccine Storage Demand Fuels Cold Chain Growth

A 35% rise in small vaccine storage units, driven by biologics and immunization programs, is fueling demand for modular cold storage, boosting Indonesia's pharma cold chain market.

## Leading Pharma Companies in Indonesia: Warehousing & Cold Chain Facilities -

### Kimia Farma –

- Operates five key production and distribution sites across major cities.
- While cold storage specifics are not public, its wide network supports nationwide pharmaceutical access.

### Kalbe Farma –

- Reaches over 1 million retail outlets through its expansive logistics arm.
- Cold chain details remain undisclosed, but scale and reach indicate strong capability in temperature-sensitive distribution.

### Bio Farma –

- State-owned vaccine manufacturer with a vital role in national immunization.



- Distribution infrastructure supports widespread vaccine delivery, though storage figures are not publicly shared.

#### Zuellig Pharma Indonesia –

- Operates a 39,930 sqm National Distribution Centre in West Java.
- Houses three advanced temperature-controlled zones with real-time monitoring.
- A benchmark in the Indonesia cold chain market, serving both local and global pharmaceutical needs.

Twelve major distributors control 65% of Indonesia's pharmaceutical market, ensuring nationwide reach, while smaller distributors serve the remaining 35% with regional and niche focus.

Notable names among these top-tier distributors include -

- Merap
- Anugrah Argon Medica (AAM)
- Anugerah Pharmindo Lestari (APL)

Their extensive distribution networks and long-standing partnerships with global and domestic pharmaceutical manufacturers make them integral to Indonesia's pharmaceutical logistics and warehousing ecosystem.

#### Key Players and Facilities in Indonesia's Cold Storage and Pharmaceutical Distribution Sector -

Several companies are leading the development of cold storage facilities tailored for pharmaceutical needs:

- PT Kiat Ananda Group: A cold chain specialist with a robust network of third-party warehouses and a storage capacity of 150,000 pallets across Indonesia.
- PT Mulia Bosco Logistik (MGM Bosco): The second-largest cold chain provider in Indonesia, offering end-to-end services and covering nearly all regions with over 20 years of industry experience.
- PT Enseval Putra Megatrading Tbk: Recently opened a new warehouse in Bandung in November 2024 to accommodate growing distribution needs in the pharmaceutical sector.

#### Challenges Facing Indonesia's Pharmaceutical Cold Chain Market

Despite growth, the industry faces challenges:

- Infrastructure Gaps: Around 40% of cold storage needs remain unmet, especially in rural and remote regions, limiting access to temperature-sensitive medicines and vaccines.
- Operational Costs: High energy consumption and maintenance costs in cold storage facilities are impacting overall profitability for businesses in the sector.
- Standardization Issues: The lack of standardized practices and regulations across the cold chain network results in operational inefficiencies and potential quality control problems.

Indonesia's pharmaceutical cold storage market is poised for growth, driven by rising healthcare needs, innovation, and investment though infrastructure and standardization remain key

challenges.

Looking Ahead: Market Outlook for Indonesia Pharmaceutical Cold Storage by 2028 - Makreo Research's latest report, "Indonesia Pharmaceutical Cold Storage Market Size and Forecast (2019-2028)", offers a comprehensive analysis of the Indonesian pharmaceutical cold storage market. The report explores the historical performance and current landscape of the market, while identifying key growth drivers and emerging opportunities that will shape its future trajectory.

The report begins with an overview of Indonesia's broader cold chain market, covering key metrics, demand-supply gaps, and emerging trends, before narrowing its focus to the Indonesia pharmaceutical cold storage market. It examines market segmentation and its link to pharmaceutical trade flows. Additionally, the study analyzes major players, M&A activity, and funding milestones to map the competitive landscape. This concise yet detailed analysis offers actionable insights for strategic decision-making and investment in the Indonesia pharma cold storage market.

#### Period of Study

- 2019 - 2023: Past and Present Scenario
- 2023 – Base year of study
- 2024 – 2028: Future Outlook

#### Types of Warehouses

- Specialized Warehouses
- Cold storage
- Container Freight Stations (CFS)
- Retail

#### By Cold Chain Services

- Cold Storage
- Cold Transport

#### Company Covered:

- Linc Group (PT LAUTAN LUAS Tbk)
- PT CKB Logistics (PT ABM Investama Tbk)
- PT Samudera Indonesia Tbk
- PT BGR Logistik Indonesia
- PT Iron Bird (BlueBird)

#### Related Reports:

[Indonesia Logistics and Warehousing Market Forecast \(2018-2028\)](#)

[Philippines Warehousing and Cold Chain Market Size and Forecast \(2019-2030\)](#)- Second Edition

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