

Pharmaceutical Business Competition in Indonesia: A Review

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ABSTRACT

The pharmaceutical industry scored a profit year on year (yoy) at a pandemic period of 10.3% while other companies were confirmed to be losing money. With the advancement of the times and the advancement of technology it is expected that pharmaceutical companies will survive to serve their consumers. product diversity strategies, managing the effectiveness of sales and marketing activities, and transforming the utilization of digital technology, are carried out so that pharmaceutical companies can serve business consumers to their businesses; i.e. pharmacies and drugstores; then pharmacies and drugstores can serve consumers eventually. In this paper, researchers used a qualitative approach to literature study methods. Where researchers collect writings or articles, books and all forms of sources related to research objects. The data is processed and analyzed to obtain a form of research results. In this paper, researchers consider the business strategies of pharmaceutical companies in Indonesia. The purpose of this research is to understand the competition of the pharmaceutical business with its marketing strategy in this era of intense competition. Changes in consumer behavior and the demand for a service more than the company usually provides, gaining momentum to create breakthrough services and products that suit consumers' wishes and are renewed. Absolute consumer satisfaction of the price that must be given by pharmaceutical companies or pharmacies in order for consumers to remain loyal to the company's products and services. Ease of technology, investment, and information become commonplace in an era of super-tight competition

Keywords: Pharmaceutical Companies, Competition, Strategy

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INTRODUCTION

The entry of Indonesia in the era of indsutri 4.0 revolution, marked by the increasing technology and convergence of digital, biological and physical innovations. Making Indonesia 4.0 is a form of commitment of President Joko Widodo in early April 2018. Indonesia is committed to implementing industry 4.0 to build a globally competitive manufacturing industry. Originally the Ministry of Industry (Kemenperin) established five sectors in the application of this industry 4.0, namely the food and beverage industry, textiles and clothing, chemical, electronic and automotive. In the course of this, there are two sectors in this industri 4.0, namely the medical devices and pharmaceutical sectors. The reason behind the addition is in addition to increasing the expansion of industry implementation 4.0, also in the demand of the last two sectors experienced increased demand

The development of industry in Indonesia, especially in the pharmaceutical and pharmaceutical sectors has created an increasingly intense competition, where currently the world of public health businesses, pharmaceutical

companies or drug companies is a commercial business company focused on researching, developing, and distributing drugs especially in terms of health (samisir 2015). Indonesia is the largest pharmaceutical market share in the Asean region reaching 27% of the total asean market share where 73% of the market share is dominated by local pharmaceutical companies (Mubarok 2017). Based on the above data, indonesia's pharmaceutical industry needs to be developed even better, for the following reasons; it turns out that Indonesians spend 1.4 billion US\$ just to enjoy health services abroad (source of IMS Health 2016), while from the social aspect, the need to develop the Indonesian pharmaceutical industry is the need for availability, independence, and consistency of the availability of such drugs, so that the cost of treatment can be more optimal; from the economic aspect; open export and import cooperation opportunities with other Countries, contribute to GDP and open new jobs; then from the technology aspect, the potential of Indonesia's natural resources both herbal and maritime, and the opportunity to transfer the latest pharmaceutical technology.

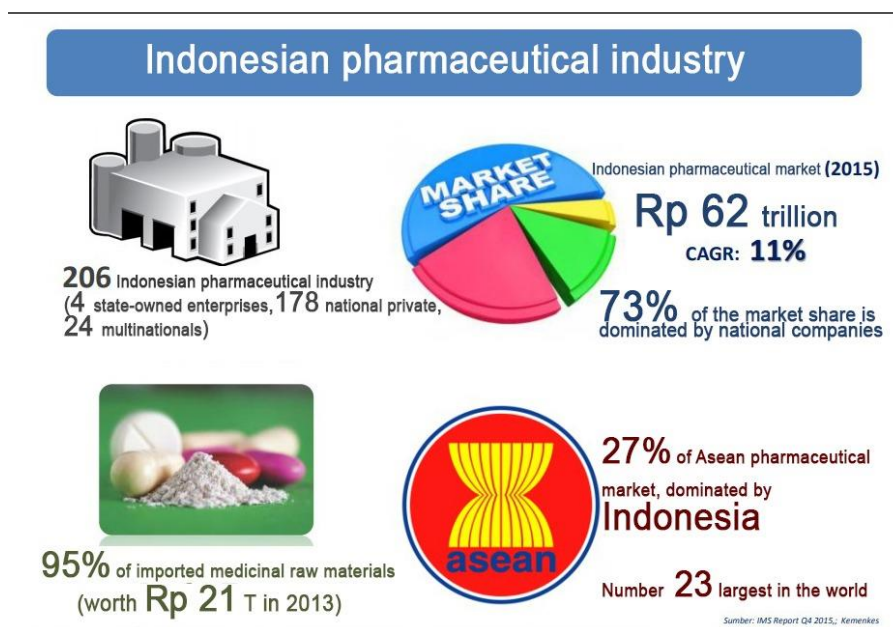


Figure 1. sourceIMS Report Q 4 Kemenkes

From the picture above we can see that the pharmaceutical industry in Indonesia is a very promising business, there are 206 players of the Indonesian pharmaceutical industry which is 73% dominated by National companies. And

became the world's number 23. However, the record is that 95% of the raw materials of the drug were still imported with a value of Rp 21 trillion in 2013.

TOTAL PASAR FARMASI NASIONAL								
2014			2015			2016		
Ranking	Perusahaan	Pangsa Pasar	Ranking	Perusahaan	Pangsa Pasar	Ranking	Perusahaan	Pangsa Pasar
1	KALBE FARMA	7,24%	1	KALBE FARMA	6,17%	1	KALBE FARMA	6,17%
2	SANBE FARMA	5,45%	2	SANBE FARMA	5,47%	2	SANBE FARMA	5,92%
3	DEXA MEDICA	4,00%	3	DEXA MEDICA	3,82%	3	DEXA MEDICA	3,82%
4	Pharos Indonesia	3,48%	4	Pharos Indonesia	3,32%	4	Pharos Indonesia	3,28%
5	Soho	3,25%	5	Tempo Scan Pacific	2,76%	5	Tempo Scan Pacific	2,58%
6	Tempo Scan Pacific	2,92%	6	Fahrenheit	2,63%	6	Kimia Farma	2,50%
7	Fahrenheit	2,44%	7	Soho	2,30%	7	Fahrenheit	2,44%
8	Konimex	2,35%	8	Biofarma	2,22%	8	Soho	2,28%
9	Hexpharm Jaya	2,23%	9	Novartis	2,18%	9	Novell Pharm	2,06%
10	Novartis	2,20%	10	Kimia Farma	2,05%	10	B. Ingelheim	2,05%
11	Bayer Indonesia	1,90%	11	Konimex	2,00%	11	Biofarma	1,99%
12	Darya Varia	1,85%	12	Darya Varia	1,93%	12	Darya Varia	1,93%
13	Kimia Farma	1,83%	13	Sanofi-Aventis	1,92%	13	Generic Manuf	1,92%
14	Lapi	1,79%	14	Novell Pharm	1,90%	14	Konimex	1,82%
15	Novell Pharm	1,77%	15	Bayer Indonesia	1,86%	15	Merck Indonesia	1,82%
16	Sanofi-Aventis	1,73%	16	Hexpharm Jaya	1,81%	16	Hexpharm Jaya	1,81%
17	Generic Manuf	1,66%	17	Merck Indonesia	1,76%	17	Lapi	1,79%

Sumber: IMS Quintiles

farmasiindustri.com

M. Fithrul Mubarak, S.Farm., Apt

Figure 2. Indonesia Pharmaceutical Market Share (www.pharmaboardroom.com)

It can be seen from the above image that positions number 1 to number 4 for three consecutive years there is no

change, while positions 6 to 10 tend to be dynamic, changing every year tends to be stiff competition

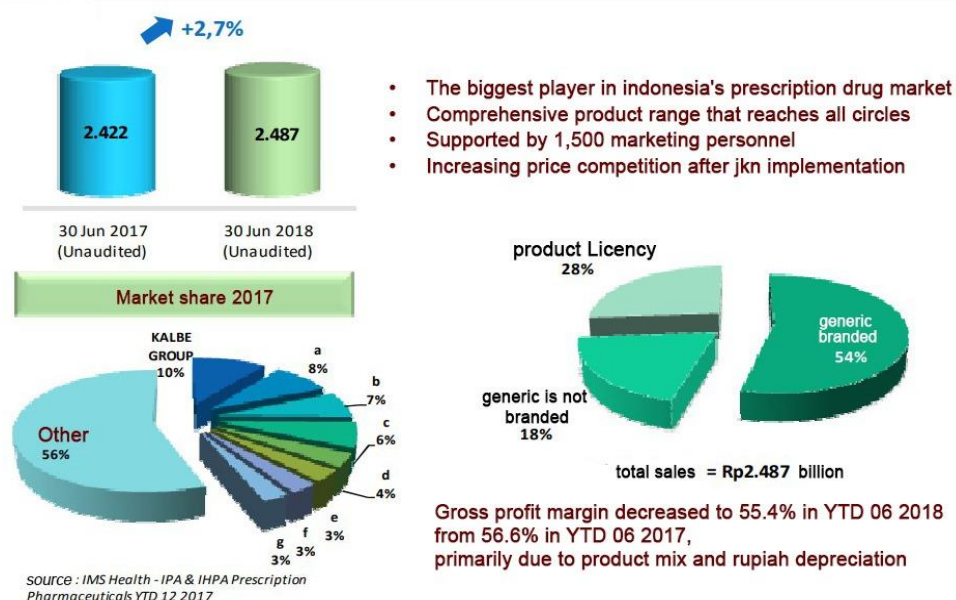


Figure 3. Kalbe Farma Prescription Drug Sales (idx.co.id)

Based on the picture above we can see that the pharmaceutical industry is a very promising industry. Kalbe Farma reported net sales growth of 3.8 percent year on year (yoy) to Rp11.60 trillion in the first half of 2020. Net income at a loss of 10.3 percent annually to Rp1.38 trillion as of June 30, 2020. "Although the impact of Covid-19 on Indonesia's macroeconomics in the second quarter of 2020 was challenging, the company was able to maintain positive and stable sales and net profit growth, higher net profit growth than net sales growth primarily due to increased efficiency in operating costs, exchange rate difference gains, and lower tax rates (market.bisnis.com). In addition, product diversity strategies are implemented, managing the effectiveness of sales and marketing activities, and transforming the utilization of digital technology.

In the pharmaceutical industry, retailers can be categorized into pharmacies (conventional), drugstores (conventional), and pharmacies or modern drugstores. As a legacy system of the Dutch colonial era, pharmaceutical retail activity began around the 1930s and the concept of pharmacies and drugstores was then arranged individually around the 1940s. The concept of pharmacies and modern drugstores was present around the early 1990s. This new concept incrementally affects the dynamics of the pharmaceutical industry from the traditional way of selling (based on the concept: there is a prescription and there is money, then there is goods) to modern competitive and marketing strategies (based on the concept of comprehensive strategy management) (Mustamu, R. H. 2000).

Business competition between pharmaceutical companies can lead to both categories, namely between drugstores or conventional pharmacies, and large drugstores and pharmacies with modern drugstores and pharmacies. Competition among conventional players is basically based only on pricing strategies, while large and modern players compete on a more complex basis (Mustamu, R. H. 2000). Every effort or step taken by the company is to satisfy consumers, the company is required to carry out the right marketing strategy in order to have a product that has the advantage of its competitors and also the

company must convey information about its products in order to attract potential consumers so as to maintain and increase the company's sales results (Mas'adi, M 2020). As well as pharmaceutical companies in Indonesia, with the easier it is for foreigners to invest in the country, the pharmaceutical company must think of the right strategy in order for its products to be accepted and survive in the pharmaceutical market share in Indonesia. Marketing is one of the important lines in the business, how a product is introduced until it is distributed until it reaches the hands of consumers is one of the tasks of the marketing department, currently there are many methods and ways that can be used to market a product of goods or services, but as the marketers are increasingly obliged to change the patterns and tactics of marketing in order to keep up with the development of the times and be able to compete in the free market with its competitors, one of them is to utilize digital marketing technology to complement existing conventional marketing strategies (Hariyanti, N. T., & Wirapraja, A. 2018).

METHOD

This research uses a qualitative approach, using literary study methods. Research data is obtained by collecting writings or articles, books and all forms of sources related to research objects. The data is processed and analyzed to obtain a form of research

RESULTS AND DISCUSSIONS

The economic success of a manufacturing company depends on the ability to identify customer needs, then quickly create products that can meet those needs at a low cost. This is not the responsibility of the marketing part, the manufacturing part, or the design part alone, but rather a responsibility that involves many of the functions that exist in the company. The method of product development based on the customer's request or requirements and product specifications is a good enough method, because based on the customer's wishes, the possibility of the product is not accepted by the customer becomes smaller

Product planning is the process of creating product ideas and following up until the product is introduced to the market. In addition, the company must have a backup strategy if the product fails in its marketing. Includes product extensions or improvements, distribution, price changes and promotions (Mas'adi, M, 2020).

Product diversity is a decision about the inward and widening diversity of the product, the variety of each product as well as the quality of the product. In addition to the diversity of products that show more options available, the possibility of meeting needs is greater, so that consumers do not have to spend time and energy to find the desired product (Rohmawati, Z. 2018).

Basically, a common sense of effectiveness indicates at the level of attainment of results, often or always associated with efficient understanding, although there is actually a difference between the two. Effectiveness emphasizes the results achieved, while efficiency looks more at how to achieve that result by comparing the in and out of goods (Fadli, A. M. 2014). Sales and marketing activities should refer to such effectiveness and efficiency. In terms of product sales, the results achieved must be in line with the company's targets, in order for the company's profit to increase. While the way to achieve these results must also be in accordance with the company's conditions, marketplace conditions, and consumer conditions with all changes

Sales and marketing activities within the company, are now inseparable. With integrated marketing, all elements within the company conduct marketing activities so that the company's goals are achieved, both profit goals and other goals of the company in order to always survive the competition. Another goal is to instill the company's value in the products sold. In such a competitive situation, to improve and increase its existence, a company needs to conduct a marketing effort and one of the marketing tools used to influence buying decisions is a marketing mix otherwise known as marketing mix where for the field of services consists of 7P namely product, price, place, promotion, people, process and physical evidence (Sudhana, P., Lukmandono, L., & Prabowo, R. 2018).

With the support of the government the big pharmaceutical companies will easily meet the market share. Especially with the national social security system program in the field of health, the consumption of drugs in the community will soar. The role of traditional or conventional drugstores will also be increasingly felt. Conventional drugstores can choose niche markets or niche markets that do not become a share for the market of large pharmaceutical companies. It is not possible that many Indonesians are reluctant to go to the hospital, and rely on self-service medicine, which relies on medicine and medicine without the supervision of a doctor. The role of marketing here will be tested and see how far it takes to master the battlefield. Marketers will increasingly be observant of the opportunity and observant to see who their consumers are.

In the world of marketing, many strategies are applied in its business competition. Both for market leaders and those playing in the market niche. Kalbe Farma with a conventional drugstore or pharmacy XYZ, will be different in running its business. But what's in common is that the two companies will try to survive the same storm, even if the strength is definitely different. Competition is certainly not only on all two examples but in almost all areas of business except monopoly.

One of the commonly applied strategies for market leaders is Innovation. Innovations in the field of products include completeness of products as well as the latest technology. This innovation will certainly only succeed in the market if the caring process (understanding the wishes of consumers) goes well. Product innovation in accordance with consumer expectations or new innovations that have more value for consumers. Medium for niche market players, the strategy that can be done is to master the segment in that niche market, in the hope that no other market participants enter this segment.

In Indonesia itself the application of innovation in the public sector has been developed in various sectors, including education, health, environment, infrastructure, and others (Eprilianto, D. F., Sari, Y. E. K., & Saputra, B. 2019). We know that the public sector is a sector whose organizational environment is very complex compared to the business sector. In the field of pharmaceutical innovation is indispensable considering the road map vision of Indonesia's pharmaceutical industry in 2015-2025, is to become the world's 15th largest pharmaceutical market by 2025 with a value of 800 trillion. Research and Development was developed with a pattern of cooperation and transfer of technology with more established institutions. After having and forming local competencies, R & D is done independently.

The development of technology is accompanied by the development of all aspects of life, both social and cultural. Not apart from the business world, there is a world of marketing. The use of the internet for the operation of a company is already a true partner for the company. Every corner of the world is so easy to reach and explore, not even more in a matter of minutes but seconds (Erlangga, H, 2020). For the pharmaceutical world, the right strategy is needed to keep the company and its product safe. The issue of holding pharmaceutical SOEs consists of Bio Farma as the parent, as well as Kimia Farma and Indofarma as its members, adding to the competition between conventional, and modern pharmaceutical players. The marketing potential of the modern era is dominated by marketing through social media accessed through personal devices (Hariyanti, N. T., & Wirapraja, A. 2018).

The rapid advancement of technology has an impact on all sectors of life. From the worlds of social, cultural, educational and even the business world. Changes in lifestyle from conventional to technologically smelling tendencies. Call it smartphones, social media, tablets, ipods and still many gadgets or platform business platforms that use the internet network. One of them is digital marketing, digital marketing is a promotional activity and market search through digital media online by utilizing various means e.g. social networks. Cyberspace is now no longer only able to connect people with devices, but also people with others all over the world (Purwana, D., Rahmi, R., & Aditya, S. 2017). One example of the development of technology in the pharmaceutical world is as follows, the benefits of pharmaceutical informatics among others (Dwiaini, I. 2019):

- a) Assisting pharmaceutical practitioners in several ways, both system design and management database that can streamline the process so that personnel are used more efficiently, and information is available on time
- b) Improve communication between pharmacists, doctors and other health workers, as well as patients.

- c) Able to increase the speed of diagnosis and check for possible drug interactions or allergies before a prescription is filled/written, Pharmaceutical Informatics allows patients to have a better understanding of the drugs they get and allows them to be an important asset in the treatment of their own.
- d) Pharmacists may also be able to assist doctors and others in finding the right prescription for certain conditions, which can reduce the need for multiple visits to a doctor's practice. This combined with low costs due to reduced visits to the doctor, the use of generic drugs, thus greatly reducing the cost of treatment for patients.

One of the objectives of switching business patterns and behaviors from conventional to digital is to make everything simple and easy for consumers. With the expectation of consumers remain loyal to the products sold by the company. Although there are still drugstores or pharmacies that still use manual notes in terms of their expenses and business income. But now it is an option for businesses whether to apply technology in their business or not, certainly with all the consequences. Or consumers who have moved on using the technology they need. It takes ugliness for businesses to choose their consumers who are literate about technology or who are still conventional.

In line with the development of science and technology that is increasingly advanced in the field of pharmaceuticals, there has been a shift in the orientation of pharmaceutical services from the beginning only drug management as a service to a comprehensive patient (Pharmaceutical Care). This is also due to the demands of patients and masyarakat more diverse on the quality of service so as to require a change in the service paradigm from an initial paradigm oriented towards drug products to a new paradigm oriented towards patients (Putri, D. R. 2017).

Competitive marketing strategy is not only the process of adjusting the behavior of the system, but also the process of continuous adaptation (Mas'adi, M 2019). Pharmaceutical companies must be able to adapt to the changing times and technology. Marketing through social media is one way of innovation in order to maintain the position of each pharmaceutical company. In addition to adapting in the marketing strategy of Indonesian pharmaceutical companies also need to adapt to their human resources. The development of competent and ready-made human resources both in quality and quantity, through a variety of ongoing programs and training.

In the pharmaceutical industry, the path of distribution of its products is to pass through the Pharmaceutical Big Merchant (PBM) first, before the pharmacy or drugstore sells to the end user or end consumer. Because the authority to sell to the end consumer is in a licensed pharmacy or drugstore. Sunarsi (2020) In the consumer pharmaceutical industry it is also very widespread, therefore pharmaceutical entrepreneurs and BUMN engaged in pharmaceuticals are very optimistic with this business. But like business, be it B2B (business to business) or B2C (business to customer), the key is in mutual understanding between the entrepreneur and the consumer, can not walk alone. Because as sophisticated as the technology is, if no loyal consumer, it will certainly be homework for the entrepreneur.

Customer loyalty is very important for the company that maintains the continuity of its business as well as the

continuity of its business activities. Loyal customers are those who are very satisfied with certain products and services, so have the enthusiasm to introduce them to whoever they are. The next stage of such loyal customers will expand their "loyalty" to other products made by the same manufacturer and eventually they are consumers who are loyal to a particular manufacturer or company for good (WS, F. S., & Municipality, S. 2018).

In terms of meeting the needs of consumers, the pharmaceutical industry is also limited by the reality of Indonesian cultural values, that not all citizens "believe" in farnasi products, many of us still believe in the sublime value of their culture. The treatment of self-healing, jamu or emponempon is still believed to cure the disease. Even in the era of pandemic covid 19, the price of emponempon or medicinal plants, soaring, because it is believed that consuming emponempon or herbal medicine can increase the endurance of the body. This is both a challenge and an input for the pharmaceutical industry. How to change consumers who are loyal to swamedikasi and jamu treatment, can switch to using pharmaceutical products. Changing perceptions, beliefs and expectations, even the belief in any product is very expensive, but it is well worth fighting for the survival of the company, products and consumer loyalty.

From the research that has been done it can be concluded that customer loyalty is influenced by customer satisfaction and trust in establishing relationships, where there is a positive influence between the two variables on loyalty variables. The purchase decision process is the solution of problems in order to meet the desires or needs of consumers (Jasmani, J., & Sunarsi, D. 2020). In addition, the quality of pharmaceutical services affects customer satisfaction and confidence, where when the quality of service provided by the service provider stipulated in this study is apotel to consumers in accordance with the expectations, there will be a sense of satisfaction and confidence from the pharmacy consumers. The trust factor is the strongest factor between the two variables in influencing loyalty (Putri, D. R. 2017).

CONCLUSION

This paper explains how pharmaceutical companies and pharmaceutical entrepreneurs in general use power, business strategies, marketing strategies, and also how consumer pharmaceutical companies contribute to those companies. Product diversity provides choice for consumers, so that there is convenience for consumers to choose the product. Marketing is done integratedly, so that the proceeds of the sale and planting of the company's value in its products can be maximized. In addition to profit from marketing that is done effectively and efficiently, the value of the company must be conveyed through the products sold. Market share of pharmaceutical companies read clearly. Conventional drugstores or pharmacies should accept playing in the niche market, whose strategy must be to master the share in that market. For market leaders, innovation is the price that the company has to pay, due to numerous attacks from rival competitors.

As technology and information advance, pharmaceutical companies adapt to these developments. Innovation continues to be made so that pharmaceutical companies, pharmacies and drugstores do not miss out on competition. Because the business that is not following the progress of the environment even the progress of its consumers, will certainly be abandoned by the consumer.

The ease with which technology is provided should serve as an opportunity to advance the company, the arrival of millennials who are adaptable to the advancement of technology should be absorbed by entrepreneurs large and small. Changes in consumer behavior and the demand for a service more than the company usually provides, gaining momentum to create breakthrough services and products that suit consumers' wishes and are renewed. Absolute consumer satisfaction of the price that must be given by pharmaceutical companies or pharmacies in order for consumers to remain loyal to the company's products and services. The ease of technology, investment, and information is commonplace in an era of super-tight competition.

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