Factsheet

Packaged Foods in Indonesia: Mintel Data Analysis 2018–2024

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Key Facts

- Most packaged food products in Indonesia exceed the nutrient thresholds under WHO SEARO and PAHO Nutrient Profile Model (NPM), thus meeting the criteria for regulatory measures.
- Packaged beverages are one of the main unhealthy products, with more than 80% of products high in sugar or containing sweeteners.
- The lower proportion of products classified as Nutri-Level D highlights potential gaps in the current national thresholds compared with the PAHO and WHO SEARO models.
- These findings reinforce the urgency of the national Nutrient Profile Model (NPM). The findings are also consistent with evidence from CISDI's NPM study, highlighting the need for an evidence-based NPM to inform a comprehensive package of healthy food policies, including sugar-sweetened beverage (SSB) taxes, front-of-pack labelling (FOPL), and marketing restrictions.

Packaged food consumption in Indonesia is rapidly increasing and contributing to high exposure to sugar, salt, and fat, which are major risk factors for non-communicable diseases (NCDs). However, information on the nutritional content and quality of products circulating in the market remains limited. Currently, the Nutri-Level thresholds are proposed for use in Indonesia. To better understand the extent to which products exceed nutrient levels of concern, this factsheet presents the results of an analysis comparing three systems: (1) Nutri-Level FOPL proposed thresholds; (2) WHO South-East Asia Regional Office (SEARO) NPM; and (3) Pan American Health Organization (PAHO) NPM.

The analysis was conducted by the Global Food Research Program (GFRP) at the University of North Carolina at Chapel Hill using Mintel Global New Products Database (GNPD) data for packaged food and beverage products launched in Indonesia between 2018 and 2024. Such analyses can help identify products that may need regulatory attention and support the development of comprehensive policies to promote healthier food environments.

The analysis was based on the nutrient and ingredient information listed on product labels captured through Mintel for a total of 5,180 products in six food categories (candy, cookies, crackers, desserts, cheese and instant noodles) and five beverage categories (juices, milk, flavored waters, coffee/tea, and non-dairy beverages). The Mintel data used reflects packaged products that are new to the market, reformulated or have packaging changes, so the analysis results reflect the profile of some product offerings, not consumption patterns.

Despite these limitations, analyses based on large commercial product databases such as Mintel GNPD provide valuable large-scale evidence to assess the healthiness of the packaged food environment and have been widely used to inform nutrition policy development in other countries (Pandav et al., 2021). Nevertheless, these findings provide an important insight into the quality of the food environment and can be used as a basis for consideration by policymakers in designing strategies to regulate sugar, salt, and fat (SSF) and create a healthier food environment.

These differences in classification approaches help explain the variation in results across models. The key characteristics of the WHO SEARO, PAHO, and Nutri-Level systems are summarised in the table below.

	WHO SEARO NPM	PAHO NPM	Nutri-Level
Criteria of products	All types of processed foods	Processed and ultra-processed foods	All types of processed foods
Nutrients of concern	Sugar, sodium, total fat, saturated fat (thresholds vary by category)	Free sugars, sodium, total fat, saturated fat, trans fat	Sugar, sodium and total fat
Non-sugar sweeteners	Presence triggers regulation	Presence triggers regulation	Nutri-Level A: contains no natural or artificial sweetener Nutri-Level B: contains only natural sweetener Nutri-Level C and D: contains natural and/or artificial sweeteners and requires mandatory FOPL

[1] *Nutrient Profile Model (NPM) is a tool that classifies foods and beverages according to their nutritional composition and establishes thresholds for nutrients or ingredients of concern (e.g., sugar, sodium, and saturated fat). NPM provides a basis for policies such as front-of-pack labelling, marketing restrictions, and taxation aimed at reducing population exposure to unhealthy food and supporting healthier diets to prevent non-communicable diseases.*

Threshold structure	Absolute thresholds per 100g/100ml by category	Combination of total energy and absolute limits	Absolute cut-offs per 100 ml or 100 gr determining A, B, C, or D[2]
Outcome classification	Eligible vs. not eligible for marketing to children, with possible adaptation for other regulation	"Excess in" one or more nutrients	A (healthiest) to D (least healthy); C & D trigger mandatory labeling and restriction[2]
Alignment with the WHO population nutrient intake goals	Aligned for all nutrients of concern	Aligned for all nutrients of concern	Not fully aligned, uses tiered system with less strict thresholds

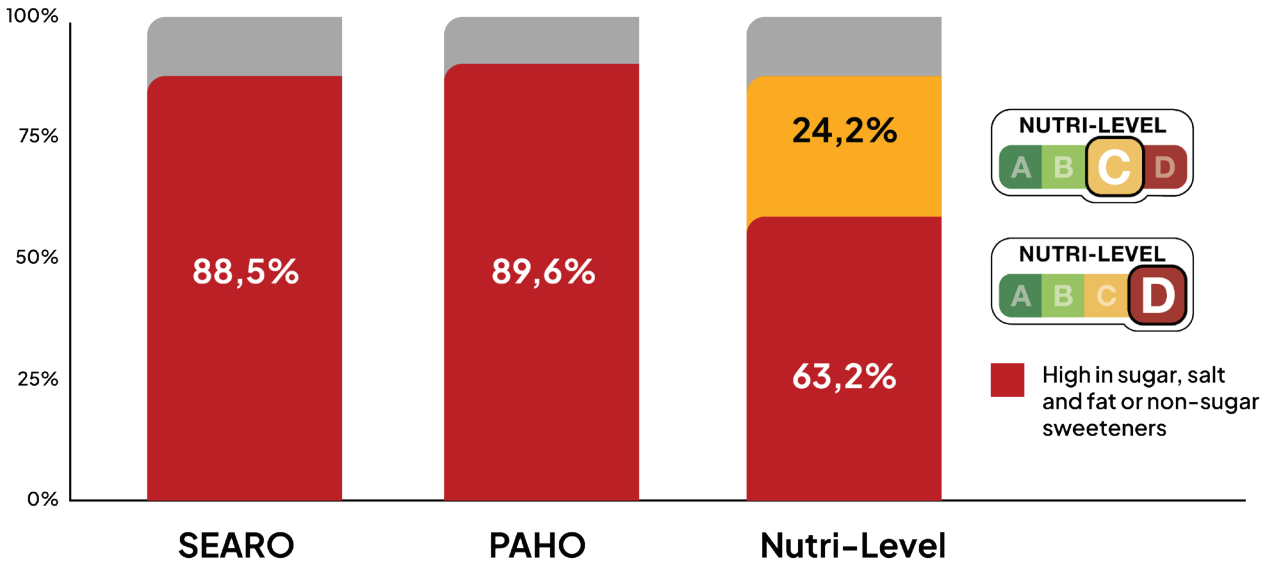
[2] The nutrients of concern threshold for food and beverages is not clear.

KEY FINDINGS

1 Most packaged food and beverages products assessed contain high levels of sugar, salt, and fat.

Figure 1

Proportion of Food and Beverages High in Sugar, Salt and Fat or Containing Non-Sugar Sweeteners (n=1580)



The analysis results showed that 63.2% of products were classified as Nutri-Level D, the category subject to the strictest regulatory measures, while 89.8% of products under

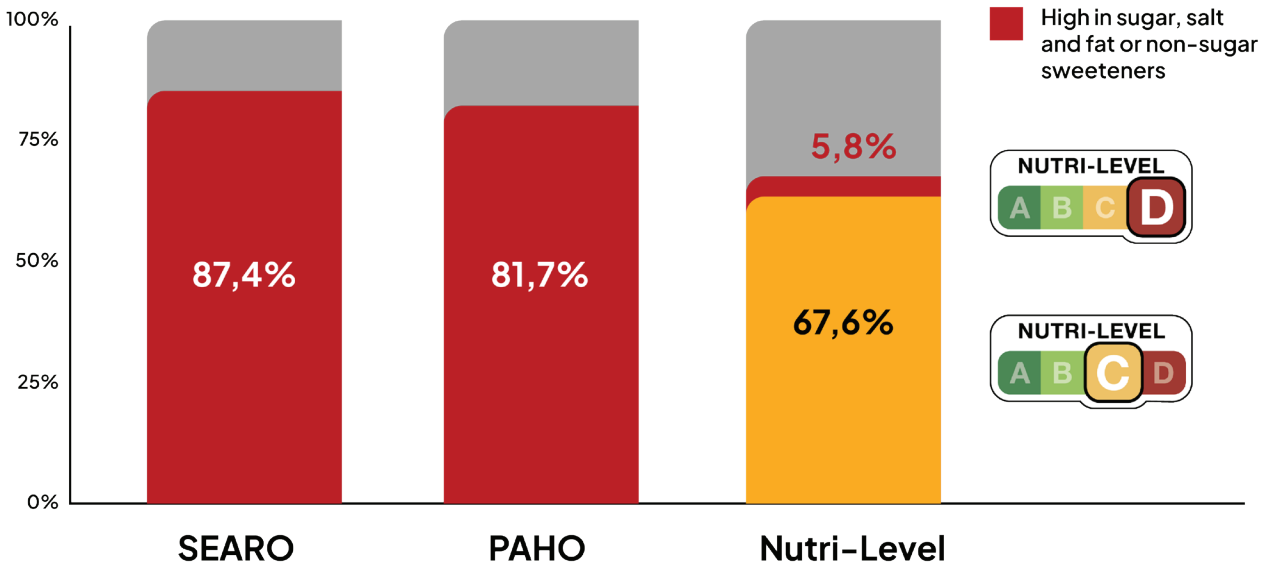
the PAHO model and 88.5% of products under WHO SEARO model exceeded at least one nutrient threshold. (**Figure 1**). This indicates that PAHO and WHO SEARO models capture a larger proportion of products with excessive nutrients of concern compared with Nutri-level D threshold, suggesting that the current proposed Nutri-Level thresholds may not as comprehensively identify products high in nutrients of concern.

In addition, 24.2% of products fall into Nutri-Level C. Although this level represents products considered "healthier" than Nutri-Level D within the Nutri-Level system, a portion of these products exceed nutrient thresholds under WHO SEARO and PAHO NPMs. This potentially weakens Nutril-Level's ability to signal unhealthy products, as these items would be classified in the most restrictive category under global standards.

2 The majority of packaged beverages are unhealthy.

Figure 2

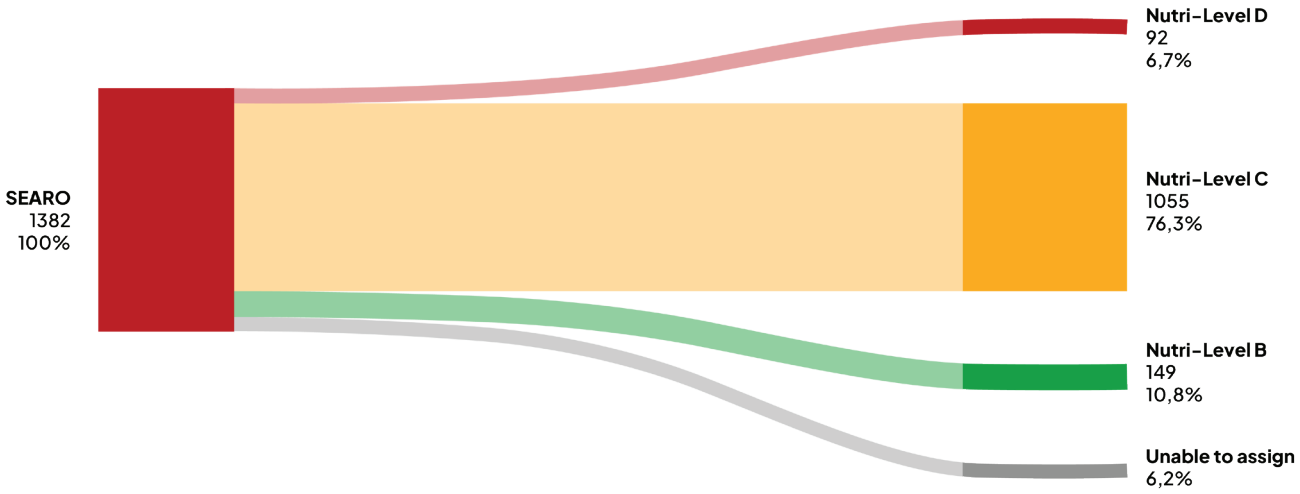
Proportion of Beverages High in Sugar, Salt and Fat or Containing Non-Sugar Sweeteners (n=1581)



These products include sweetened beverages, flavored milk drinks, ready-to-drink coffee and tea, and juices. As shown in **Figure 2**, among 1581 beverage products, only 5.8% are classified as Nutri-Level D, while 81.7% under the PAHO model and 87.4% under the SEARO model are identified as exceeding nutrient thresholds. This indicates that a much smaller proportion of beverages are captured under Nutri-level D compared with exceeding the NPM PAHO and WHO SEARO models. As shown in **Figure 3**, among the beverages classified as unhealthy under the WHO SEARO NPM (n= 1,382), only 6.7% exceed Nutri-Level D thresholds (92 out of 1,382 products).

Figurer 3

Proportion of Beverages High in Sugar, Salt, Fat, or Containing Non-Sugar Sweetener according to SEARO Identified as Nutri-Level (n=1382)



The Nutri-Level model is less strict in identifying unhealthy beverages compared with the other models. Under Nutri-Level, beverages have higher sugar thresholds compared to those used in the PAHO and WHO SEARO models, and may still be placed in Category C rather than in Category D, the most restrictive model. In contrast, the PAHO and WHO SEARO models apply a binary approach, where exceeding any single nutrient of concern threshold or containing any non-sugar sweeteners directly places a product within the scope of regulatory attention. Similar comparative analyses have been used in other countries to support food policy development.

The analysis conducted in India, where application of the WHO SEARO model to over 31,000 packaged food products demonstrated its suitability for regulatory assessment [1]. In addition, countries such as Chile and Mexico have used NPM to determine which products require front-of-pack warning labels and marketing restrictions, while the United Kingdom applies NPM to regulate advertising of foods high in fat, sugar and salt [2]. These experiences demonstrate that the clearer and stricter nutrient classification systems provide a stronger regulatory basis for protecting public health.

POLICY RECOMMENDATIONS

Adopt an evidence-based nutrient profile model (NPM)

The Indonesian government should adopt a conflict-of-interest free NPM aligned with global best practices such as those recommended by WHO (e.g. PAHO or WHO SEARO models), to support public health policies aimed at reducing population consumption of sugar, salt, and fat and preventing diet-related NCDs.

Reassess the proposed Nutri-level FOPL system and thresholds

The proposed Nutri-Level FOPL system thresholds identify fewer products high in nutrients of concern when compared with global best practices NPM and it may reduce regulatory and consumer clarity. The current design risks under-identifying products that warrant public health attention. The system should therefore be reassessed and strengthened to align with international best practices, ensuring clearer identification of unhealthy products and more effective consumer protection, in support of Indonesia's public health priorities, including the Golden Generation 2045 vision.

Implement warning front-of-pack labelling

Under the current Nutri-Level system, some products classified in Category C may already be high in sugar, salt, or fat according to global standards, yet are presented as less concerning. This may create a misleading perception that such products are healthier options. Implementing a simple, mandatory and interpretive warning label based on an evidence-based NPM would more clearly identify products high in sugar, salt, and fat, improve consumer understanding, and strengthen effectiveness of other policy measures.

Implement a comprehensive policy package

Nutrient profiling should be part of a broader set of policies, including front-of-pack labelling, marketing restrictions, and fiscal measures like sugary sweet beverages tax. Together, these can help reduce exposure to unhealthy products and support healthier choices.

REFERENCES

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