

ACCESS TO
NUTRITION
INITIATIVE

Benchmarking of Commercially Produced Complementary Foods (CPCF) companies in Indonesia

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Abbreviations

ATNI	Access to Nutrition Initiative
CPCF	Commercially Produced Complementary Foods
FOP	Front of pack
NPM	Adapted WHO Europe nutrient profile and promotion model for CPCF
UNICEF	United Nations Children's Fund
WHO	World Health Organization

About the Access to Nutrition Initiative

Access to Nutrition Initiative (ATNI) is an independent, not-for-profit organization established in 2013. It publishes independent, comprehensive analyses and commentary on companies' efforts to improve consumers' access to nutritious foods and beverages, both globally and within specific markets. Assessing producers of breast-milk substitutes and complementary foods is an integral part of ATNI's work. In the course of its research, ATNI collaborates with a wide range of stakeholders, including the investment community, to ensure that its Indexes and reports are useful tools as they engage with and invest in companies.

About the Southeast Asia Consortium for Improving Complementary Foods (COMMIT)

The COMMIT initiative is a consortium of organizations^a that have been working together since 2020 to improve the quality of Commercially Produced Complementary Foods (CPCF) in Southeast Asia. COMMIT aimed to address the need for a strong evidence base on CPCF through different workstreams, including reviews of existing national legislation and standards for CPCF, micronutrient landscape analyses, understanding caregivers' perceptions of CPCF, and assessments using an adapted World Health Organization (WHO) Europe nutrient profile and promotion model for CPCF (NPM) for these products sold in the capital cities and through online retailers in seven Southeast Asian countries. COMMIT's work spans across the following countries: Cambodia, Indonesia, Lao PDR, Malaysia, Philippines, Thailand, and Viet Nam. The findings from COMMIT's different workstreams will be used to provide technical support for improving complementary feeding through three main platforms, namely strengthening, or developing government regulations on CPCF, building consumer awareness on CPCF, and encouraging industry reformulation of CPCF to meet nutrient composition and labeling requirements.

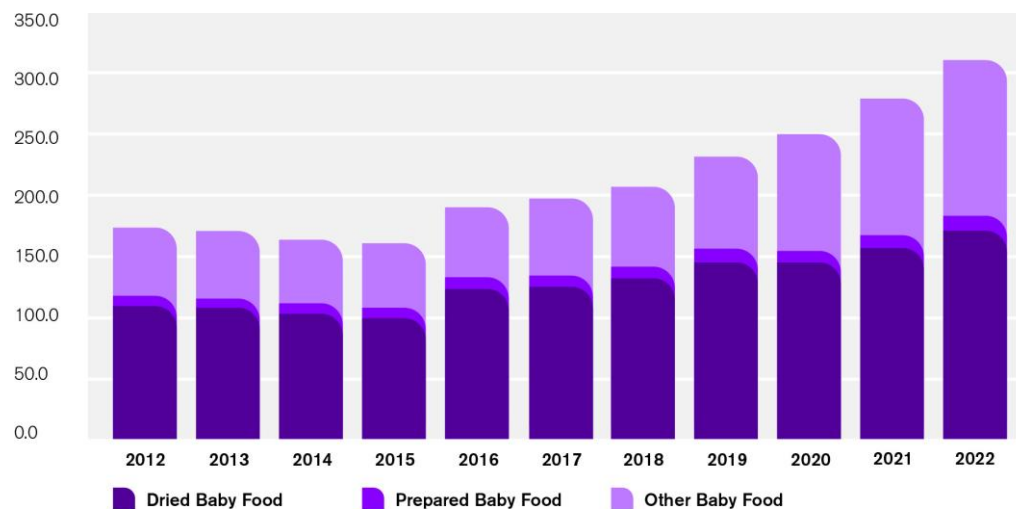
^a COMMIT partners include Access to Nutrition Index; Alive & Thrive; Helen Keller International; JB Consultancy; School of Food Science, University of Leeds; UNICEF East Asia and the Pacific Regional Office; World Food Programme Asia Pacific Regional Bureau; and WHO Southeast Asia Regional Office (observer)



1. Context: Indonesia's complementary foods market

The market for CPCF is well-established in Indonesia, it reached over USD 310 million in sales in 2022, based on Euromonitor International data (see Figure 1). Sales of CPCF almost doubled during the past 10 years, particularly in the category of 'other' baby foods (see Box 1 for CPCF categories as defined in the Euromonitor International database), which has seen a continuous rise in sales since 2016. However, in 2022, the highest sales were in the 'dried' baby food category (over USD 170 million), followed by 'other' baby foods (over USD 125 million) and 'prepared' baby foods categories (over USD 11 million), i.e., ready-to-eat foods.

Figure 1. CPCF market size in Indonesia, 2012-2022 (USD million)



Box 1. Euromonitor International baby food category definitions

Baby food: This is the aggregation of milk formula, prepared, dried, and other baby food.

Dried baby food: Products which require the addition of water before consumption, and which are usually sold in packets. Cereals and dehydrated soups are also included. Please note that retail volumes are shown in terms of as sold and are not reconstituted volumes.

Prepared baby food: Baby products sold in jars, cans, or retort flexible pouches which do not require any cooking preparation other than heating. Includes puréed food, yogurts, chilled desserts, soup, desserts, and ice cream marketed for babies.

Other baby food: Any other products marketed for babies are included here; examples may include baby rusks, teething biscuits, baby fruit juices, baby herbal tea, etc.

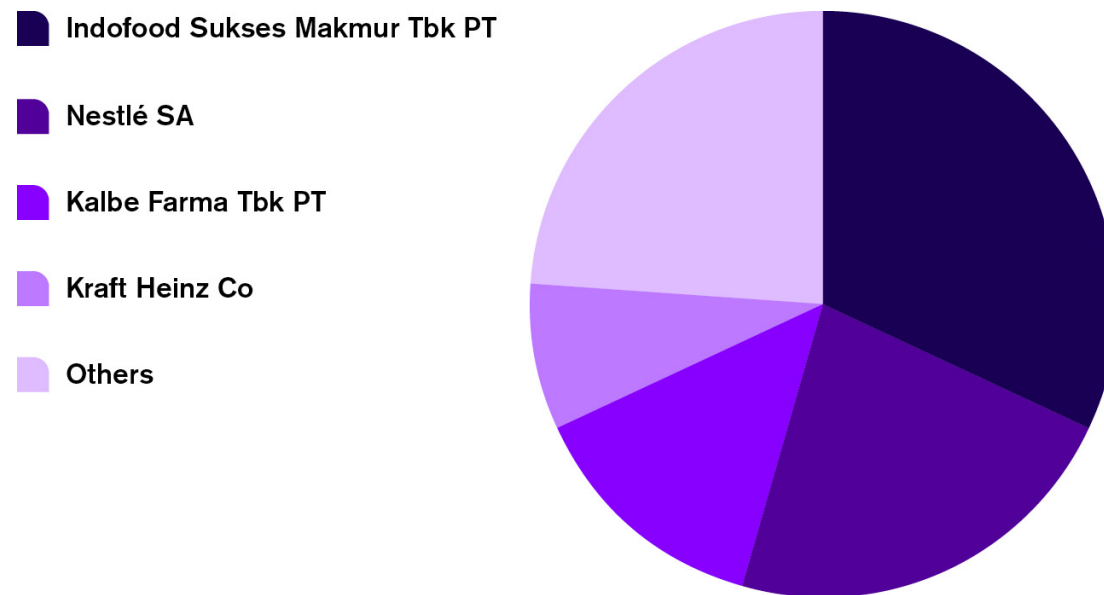
Note: Euromonitor International's categorization of CPCF does not align with WHO Europe's CPCF categorization as described in its draft nutrient profiling model.

*Source: Euromonitor International 2012-2022. Note this data is modelled and, therefore, there may be inaccuracies due to the limited resources available for data collection.



Over 50% of the CPCF market in Indonesia is comprised of products from two companies: PT Indofood CBP Sukses Makmur Tbk, a local CPCF company, and Nestlé, a non- local company. Another two companies, PT Kalbe Farma Tbk, another local company, and the global CPCF company Kraft Heinz Co., make up 22% of Indonesia's CPCF market (Figure 2).

Figure 2. Company shares of the CPCF market in Indonesia in 2022 (USD million)



Source: Euromonitor International 2022



2. Findings

2.1 Products by company

The study used a cross-sectional design to gather data on the nutrient content and labeling practices of CPCF sold in Jakarta, Indonesia. The nutrient content and labeling data were extracted from the information provided on CPCF product labels. In Indonesia, a total of 281 unique CPCF products were identified for inclusion in the study. However, nine of these products were excluded from the analysis because:

- Four CPCF did not provide the required label information in Bahasa Indonesia or English
- Two CPCF did not include nutrient information.
- One CPCF had the nutrient information covered with a sticker.
- Two CPCF were missing photographs from their back panel.

A final count of 272 unique CPCF were included in the study. As shown in Table 1, the 272 products were manufactured by 22 companies and compromised by 24 brands. Half of the companies were based outside of Indonesia, and the other 11 companies were local companies. Almost half (47%) of the 272 products identified belonged to Indonesian companies. The remaining CPCF belonged to companies based in Singapore (~14%), Switzerland (11%), Thailand (~9%), Korea (8.5%), and the United States (7%). Only around 3% CPCF belonged to companies based in Italy and Malaysia (Table 1).

Of these, 122 were identified as 'snacks and finger foods', and 112 'dry, powdered, and instant cereal/starchy food'. The remaining products were 'soft-wet spoonable' foods (n=33), 'juices and other drinks'(n=1) and 'other's (n=4). There were no 'meals with chunky pieces' identified in Indonesia (Annex 1).

Of these products, a total of 259 were assessed against the NPM. Thirteen were not assessed further (i.e., no nutrient composition or labeling assessment was undertaken). Nine of these products (manufactured by Ivenet (n=5), Peachy Village Co., Ltd. (n=1), and Yummy Bites Holding Ltd (n=3)) automatically 'failed' the NPM for CPCF as they were category 4.1 (confectionery, sweet spreads and fruit chews) or category 5.1 (single or mixed fruit juices, vegetable juices, or other non-formula drinks) products which should not be promoted to children under 3 years of age. An additional four products were not assessed for nutrient composition and labeling practices as they did not fall under any of the defined NPM for CPCF categories and were therefore categorized as category 6.1 'other' products which are not assessed. The four 'other' products were multi-vitamin honey by Ultra Sakti; coconut oil by PT Deva Oil and sesame oil and seaweed sprinkles by Ivenet.

Table 1. CPCF by parent company name, headquarters, and brand name (grouped by headquarter location in alphabetical order) *

Parent company	Headquarters	Brand name	% (n)	Category of products (n)
CV. Jasmine Yogyakarta	Indonesia	Omo!	2.9% (8)	4: finger foods and snacks (8)
CV. Shinta Rama	Indonesia	Hotel Quality Brand	1.8% (5)	1: dry instant starch (5)
Gasol Pertanian Organik	Indonesia	Gasol Pertanian Organik	2.9% (8)	1: dry instant starch (8)
Kalbe Farma Tbk PT.	Indonesia	Milna	14.7% (40)	1: dry instant starch (23) 2: soft wet spoonable (3) 4: finger foods and snacks (14)
PT Deva Oil	Indonesia	Con Cos	0.4% (1)	? 6: others (1)
PT Hassana Boga Sejahtera	Indonesia	Nayz	1.1% (3)	1: dry instant starch (3)
PT. Indofood CBP Sukses Makmur Tbk	Indonesia	Promina	11.8% (32)	1: dry instant starch (20) 4: finger foods and snacks (12)
		SUN	6.6% (18)	1: dry instant starch (15) 4: finger foods and snacks (3)
PT. Monde Mahkota Biskuit	Indonesia	Monde	0.4% (1)	4: finger foods and snacks (1)
PT Mulyatek Bakeri	Indonesia	Alamil	1.5% (4)	4: finger foods and snacks (4)
Ultra Sakti	Indonesia	Tresno Joyo	0.4% (1)	? 6: others (1)
Lo Bello Fosfovit	Italy	Lo Bello	1.5% (4)	4: finger foods and snacks (4)
Earth Living Sdn. Bhd.	Malaysia	Earth Living	0.4% (1)	1: dry instant starch (1)
Everprosper Food Industries Sdn. Bhd.	Malaysia	Golden Noodle	1.1% (3)	1: dry instant starch (3)
Ivenet	Republic of Korea	Ivenet	7.0% (19)	4: finger foods and snacks (17) X 5 of those were '4.1' ? 6: others (2)
The HI Co., Ltd.	Republic of Korea	Bebidang	1.5% (4)	4: finger foods and snacks (4)
Yummy Bites Holding Ltd.	Singapore	Yummy Bites	14.3% (39)	1: dry instant starch (11) 2: soft wet spoonable (5) 4: finger foods and snacks (23) X 3 of those were '4.1'
Nestlé	Switzerland	Cerelac	7.7% (21)	1: dry instant starch (19) 4: finger foods and snacks (2)
		Gerber	3.3% (9)	4: finger foods and snacks (9)
Healthy Foods Co. Ltd.	Thailand	Apple Monkey	2.6% (7)	4: finger foods and snacks (7)
Namchow (Thailand) Co. Ltd.	Thailand	Namchow	0.7% (2)	4: finger foods and snacks (2)
Peachy Village Co. Ltd.	Thailand	Peachy	5.9% (16)	2: soft wet spoonable (12) 4: finger foods and snacks (3) X 5: juices and other drinks (1)
Happy Tummy	Indonesia	Happy Tummy	2.6% (7)	1: dry instant starch (4) 4: finger foods and snacks (3)
Kraft Heinz Co	United States	Heinz	7.0% (19)	2: soft wet spoonable (13) 4: finger foods and snacks (6)
Total number of unique CPCF			100.0% (272)	

*Note products highlighted in light purple were identified as local companies. In this report, local companies refer to companies headquartered in Indonesia.

X = These products fell under the 4.1 (confectionery, sweet spreads, and fruit chews), 5.1 (single or mixed fruit juices, vegetable juices, or other non-formula drinks) or 5.2 (cow's milk and milk alternatives with added sugar or sweetening agent) categories which should not be promoted to children < 3 years of age and thus automatically 'failed' the NPM.

? = These products are of the 6.1 'other' category of the NPM which are not assessed against the nutrient composition and labelling requirements. These products were multi-vitamin honey, coconut oil, sesame oil, and seaweed sprinkles.

2.2 Combined results: nutrient composition and labeling practices

A total of 20 companies produced the 259 CPCF assessed using the adapted NPM for CPCF. As shown in Table 2, **none** of the companies' assessed CPCF products met both the nutrient composition and labeling requirements of the NPM for CPCF. Thus, no CPCF were found to be suitable for promotion for older infants and young children between six and 36 months of age. None of the products passed all labeling requirements. However, some companies performed better than others against the nutrition composition criteria:

- Only 41 assessed CPCF products met **all nutrient composition thresholds**, and based on the NPM for CPCF, were considered of appropriate nutrient content.
- Among the products that met all relevant nutrient composition requirements (n=41), most belonged to the following CPCF categories: 'dry or instant cereals/starch' (n=25), followed by 'fruit purée' (n=7) and 'snacks and finger foods' (n=6).
- The Malaysian company Earth Living Sdn. Bhd. is the only company whose assessed product (n=1) met all applicable nutrient composition thresholds,
- Six companies had none of their products (n= 68) meet all applicable nutrient composition requirements. Half of these were Indonesian companies; PT Indofood CBP Sukses Makmur Tbk, PT. Monde Mahkota Biskuit, and PT. Mulyatek Bakeri. The other three included two companies in Thailand (Healthy Foods Co., Ltd. and Namchow (Thailand) Co., Ltd.) and the Italian company Lo Bello Fosfovit.
- Six companies had over 55% of their assessed CPCF meet all applicable nutrient composition thresholds.
- Five companies had between 12% and 33% of their products meet the nutrient composition thresholds.
- Three companies had between 5% and 7.5% of their products meet the nutrient composition thresholds.
- Of the products that did not meet all nutrient composition requirements (n=218), the majority belonged to the 'snacks and finger foods' category (n=108), followed by the 'dry or instant cereals/starch' category (n=87).



Table 2. Nutrient composition and labeling practices assessment, combined nutrient profiling outcome (n=259)

Company	Number of products	% met all relevant nutrient composition requirements	% met all relevant labeling requirements	% met all requirements
CV. Jasmine Yogyakarta	8	12.5%	0.0%	0.0%
CV. Shinta Rama	5	60.0%	0.0%	0.0%
Earth Living Sdn. Bhd.	1	100.0%	0.0%	0.0%
Everprosper Food Industries Sdn. Bhd.	3	33.3%	0.0%	0.0%
Gasol Pertanian Organik	8	62.5%	0.0%	0.0%
Healthy Foods Co. Ltd.	7	0.0%	0.0%	0.0%
Ivenet	12	16.7%	0.0%	0.0%
Kalbe Farma Tbk PT.	40	7.5%	0.0%	0.0%
Kraft Heinz Co	19	5.3%	0.0%	0.0%
Lo Bello Fosfovit	4	0.0%	0.0%	0.0%
Namchow (Thailand) Co. Ltd	2	0.0%	0.0%	0.0%
Nestlé	30	6.7%	0.0%	0.0%
Peachy Village Co..Ltd.	15	26.7%	0.0%	0.0%
PT Hassana Boga Sejahtera	3	66.7%	0.0%	0.0%
PT. Indofood CBP Sukses Makmur Tbk	50	0.0%	0.0%	0.0%
PT. Monde Mahkota Biskuit	1	0.0%	0.0%	0.0%
PT Mulyatek Bakeri	4	0.0%	0.0%	0.0%
The HI Co., Ltd.	4	75.0%	0.0%	0.0%
Happy Tummy	7	57.1%	0.0%	0.0%
Yummy Bites Holding Ltd.	36	25.0%	0.0%	0.0%
Total number of products meeting NPM requirements	259	15.8% (41)	0.0% (0)	0.0% (0)



2.3 Nutrient composition results

Table 3 sets out the proportion of each company's CPCF products that met each of the seven nutrient composition thresholds in the NPM. With regards to thresholds applicable to all CPCF product types:

- Most products (~90%) met the total fat threshold requirement although, compared to other companies, the Korean company Ivenet had relatively fewer products meeting this requirement (<17%).
- Almost half of all the products (~48%) met sodium requirements, only four companies had all their assessed products meet sodium thresholds, and another four companies had none of their products meet this requirement. Among the remaining companies, seven had 50% or less of their CPCF products meet sodium thresholds, and five had 60% or more of their products 'passing' this requirement.
- Only a third of the CPCF (~34%) met the 'no added sugar/sweeteners' requirement. Seven companies had all of their products meet this requirement, while four companies had none of their products passing the no added sugar/sweeteners: Healthy Foods Co., Ltd., Lo Bello Fosfovit, Namchow (Thailand) Co., Ltd., and PT. Monde Mahkota Biskuit.

For the criteria assessed for specific CPCF categories:

- Among the relevant products (n=129), almost 94% met the requirement of having 'low/no added fruit'. Among the 12 companies whose CPCF were assessed on this requirement, seven companies had all of their products meet this threshold, while the other five companies had over 60% of their products meeting this threshold.
- Approximately 55% of products categorized as 'snacks and finger foods' had less than 15% of their total energy from total sugar content. Three companies – Kraft Heinz Co., Lo Bello Fosfovit, and PT Monde Mahkota Biskuit – had all their 'snacks and finger foods' *exceeding* this threshold, while five companies (CV. Jasmine Yogyakarta, Ivenet, Peachy Village Co., Ltd., PT Mulyatek Bakeri, and The HI Co., Ltd.) had all their products meet this requirement. As shown in Table 3, companies' performance on this threshold varied.
- A little over half of the puréed CPCF (54.5%) met the applicable energy density requirements. Only one company – PT Kalbe Farma Tbk – had all its purées meeting caloric requirements.
- The majority of protein-based puréed meals and dry/instant cereals with milk (~97%) met protein requirements.



Table 3. Proportion of products that met applicable nutrient thresholds per company*

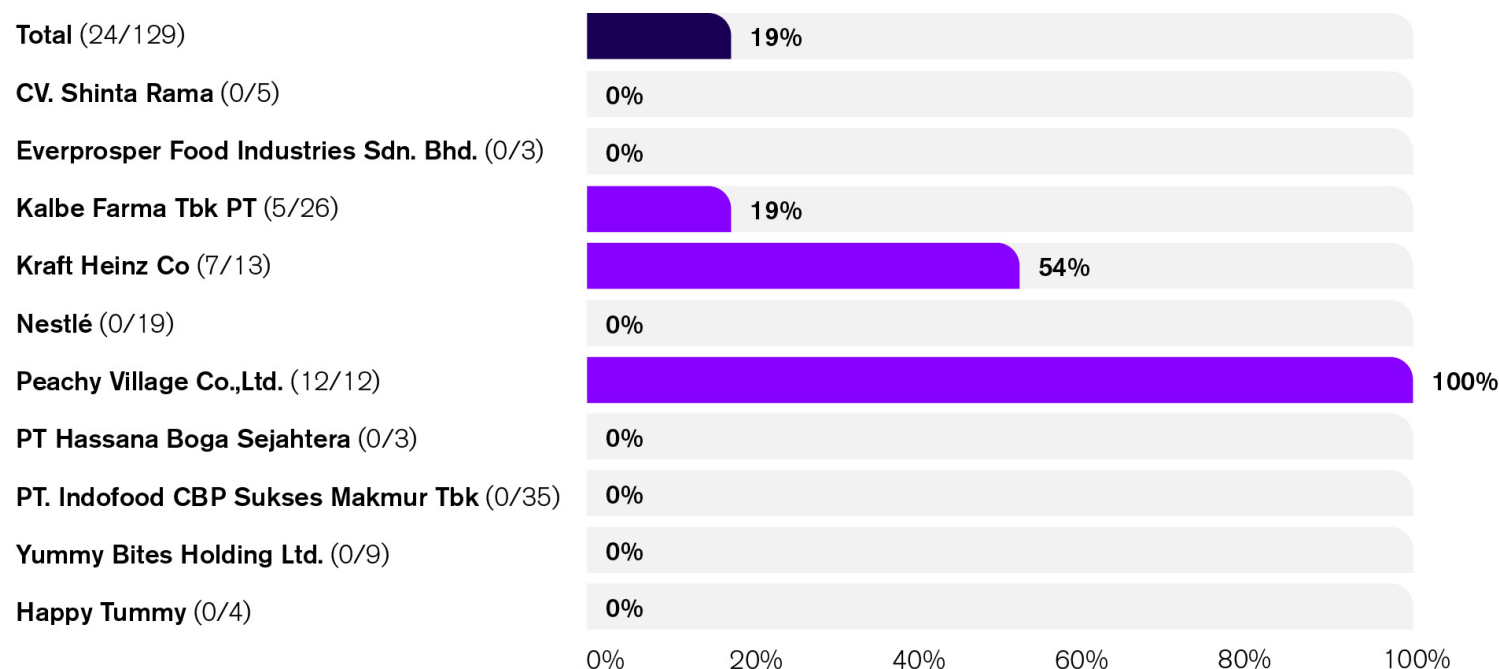
Company	Number of products	Criteria assessed for all categories			Criteria assessed for specific categories			
		% products with no added sugar/ sweeteners	% products meeting sodium thresholds	% products meeting total fat thresholds	Products with low/no added fruit % (n)	Products with <15% total E from total sugar % (n)	Products meeting E density thresholds % (n)	Products meeting protein thresholds % (n)
CV. Jasmine Yogyakarta	8	75.0%	12.5%	100.0%	-	100.0% (8)	-	-
CV. Shinta Rama	5	100.0%	60.0%	100.0%	100.0% (5)	-	-	100.0% (5)
Earth Living Sdn. Bhd.	1	100.0%	100.0%	100.0%	100.0% (1)	-	-	100.0% (1)
Everprosper Food Industries Sdn. Bhd.	3	100.0%	33.3%	100.0%	100.0% (3)	-	-	100.0% (3)
Gasol Pertanian Organik	8	100.0%	100.0%	75.0%	87.5% (7)	-	-	100.0% (8)
Healthy Foods Co..Ltd.	7	0.0%	0.0%	71.4%	-	71.4% (5)	-	-
Ivenet	12	25.0%	16.7%	16.7%	-	100.0% (12)	-	-
Kalbe Farma Tbk PT.	40	7.5%	40.0%	100.0%	100.0% (23)	21.4% (3)	100.0% (3)	100.0% (23)
Kraft Heinz Co	19	42.1%	73.7%	94.7%	100.0% (9)	0.0% (0)	53.8% (7)	75.0% (3)
Lo Bello Fosfovite	4	0.0%	0.0%	100.0%	-	0.0% (0)	-	-
Namchow (Thailand) Co. Ltd	2	0.0%	50.0%	100.0%	-	50.0% (1)	-	-
Nestlé	30	13.3%	76.7%	93.3%	94.7% (18)	18.2% (2)	-	100.0% (19)
Peachy Village Co..Ltd.	15	73.3%	73.3%	100.0%	66.7% (2)	100.0% (3)	41.7% (5)	33.3% (1)
PT Hassana Boga Sejahtera	3	100.0%	66.7%	100.0%	100.0% (3)	-	-	100.0% (3)
PT. Indofood CBP Sukses Makmur Tbk	50	12.0%	30.0%	100.0%	97.1% (34)	40.0% (6)	-	100.0% (35)
PT. Monde Mahkota Biskuit	1	0.0%	0.0%	100.0%	-	0.0% (0)	-	-
PT Mulyatek Bakeri	4	100.0%	0.0%	50.0%	-	100.0% (4)	-	-
The HI Co., Ltd.	4	100.0%	100.0%	75.0%	-	100.0% (4)	-	-
Happy Tummy	7	57.1%	100.0%	100.0%	100.0% (4)	66.7% (2)	-	100.0% (4)
Yummy Bites Holding Ltd.	36	38.9%	44.4%	80.6%	75.0% (12)	65.0% (13)	60.0% (3)	93.3% (14)
Total products that meet applicable nutrient thresholds	259	33.6% (87)	48.3% (125)	89.6% (232)	93.8% (121)	55.3% (63)	54.5% (18)	96.7% (119)
Total products applicable to each assessed requirement		259	259	259	129	114	33	123

*Note where no value is presented, the '-' indicates that the NPM requirement was not applicable to the company's CPCF product category(s).



The NPM for CPCF also assessed products to determine whether they would require a front-of-pack (FOP) 'high sugar' warning label. A 'high sugar' warning label would be required if the percentage energy from total sugar content exceeds category-specific thresholds. The 'high sugar' warning applied to all categories of CPCF products, except for category 4.3 'snacks/finger foods', to which a total sugar threshold was applied (as seen in Table 3). A total of 129 CPCF product labels declared total sugar content and were thus assessed against this additional threshold. Of the 129 products, 18.6% would require a 'high sugar' FOP warning as the energy percentage from total sugar content exceeded the category-specific thresholds (Figure 3). Products belonging to seven companies did not require a 'high sugar' FOP label, but all 12 products belonging to Peachy Village Co., Ltd. required such a warning label. Two other companies – PT Kalbe Farma Tbk and Kraft Heinz Co. – had CPCF requiring a 'high sugar' FOP label, as shown in Figure 3.

Figure 3. Percentage of products that required a 'high sugar' FOP label*

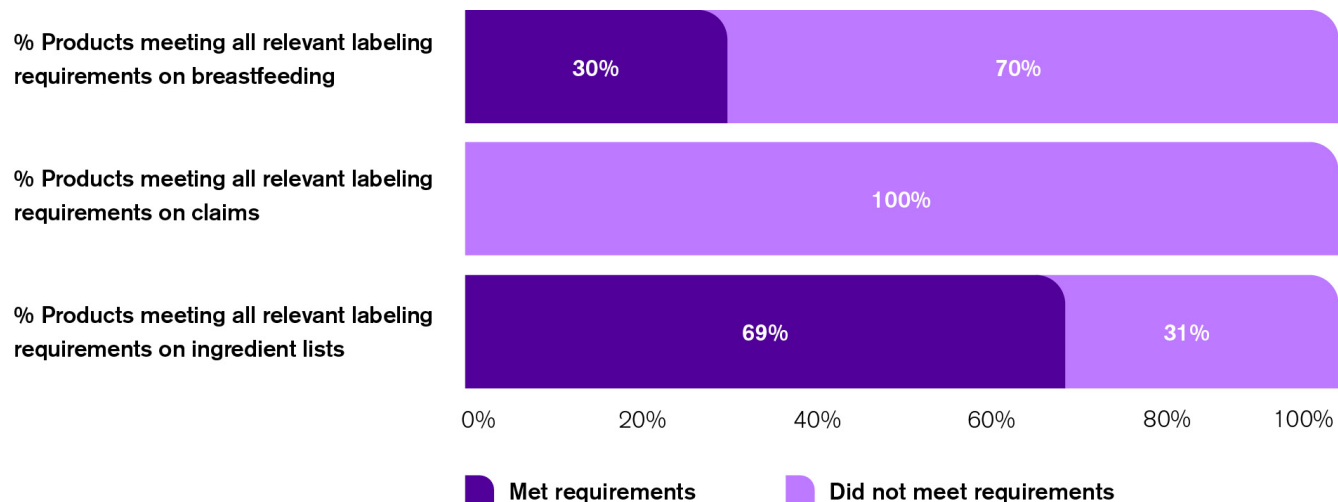


*Note out of 129 applicable products that declared total sugar content on labels, 24 require this warning label. FOP 'high sugar' warning was required if the percentage energy from total sugar content is \geq the threshold for that product category: 1.1: 40%; 2.2/2.3: 30%; 2.4: 20%; 2.6/2.7/3.1: 15%.

2.4 Labeling assessment results

None of the companies' products met all labeling requirements (i.e. protection and promotion of breastfeeding, claims and ingredient list clarity). As seen in Figure 4, only 30% CPCF met labeling requirements on the protection and promotion of breastfeeding, while only one product (0.4%) met all labeling requirements on claims. However, almost 70% CPCF met all relevant labeling requirements related to ingredient list clarity.

Figure 4. Percentage of products meeting all labeling requirements on the protection and promotion of breastfeeding, claims and ingredient lists clarity.



2.4.1 Labeling requirements on the protection and promotion of breastfeeding

Thirteen companies had none of their products that meet any of the labeling requirements on the protection and promotion of breastfeeding. Only one company – Ivenet - had all 12 CPCF meet all labeling criteria related to breastfeeding. Of the 259 products, none of the products suggested **superiority or equivalence to breast milk** (100% 'passed' this requirement) and most did not **recommend or promote bottle feeding** (98.5%), except for the products by Lo Bello Fosfovit. Half of the companies (n=10) had all their CPCF pass the requirement of including a **minimum recommended age of introduction of at least six months**, but performance varied among the other companies' CPCF in meeting this requirement – overall, 76% of products assessed did include the minimum recommended age of six months. Around 68% CPCF were **not marketed as being suitable for consumption by infants younger than six months**.



Company performance also varied on this requirement, but two companies - Gasol Pertanian Organik and PT Hassana Boga Sejahtera had none of their products meet this criterion. More than half of the companies (n=11) did not have **a message on the importance of continued breastfeeding for up to two years of age or beyond** on any of their products. Of all the CPCF assessed, around 40% met this requirement and only two companies – Ivenet and Happy Tummy – had this message on all their products (See Annex 2 for specific criteria).

2.4.2 Labeling requirements on claims

Only one product by Kraft Heinz Co. met all labeling requirements on claims (i.e. non-permitted compositional claims, no nutrient content claims, no nutrient function claims, no disease risk reduction claims and no other claims). Few products did not include any **non-permitted compositional** claims or **'other'** claims – only around 16% and 7% of assessed CPCF met these labeling requirements, respectively. Companies varied considerably in the proportion of their products that did not have **nutrient content** claims but, overall, approximately 31% of the total products did not carry such claims. Many products (~65%) did not have **nutrient function** claims and most companies (n=14) did not have any products with such claims. The majority of CPCF (~99%) did not include **disease risk reduction** claims on their labels but two companies – Earth Living Sdn. Bhd. and Yummy Bites Holding Ltd. did have CPCF products with labels carrying disease risk reduction claims. (See Annex 3 for specific criteria.)

2.4.3 Labeling requirements on product name and ingredient list clarity

Almost 70% CPCF met all relevant labeling requirements on product name and ingredient list clarity (i.e. product name reflects ingredients in descending order as per ingredient list; fruit stated on ingredient list; percentage of added water stated on ingredient list; and percentage of protein stated on ingredient list) - five companies had all their products meeting these requirements. Three companies – Kraft Heinz Co., Peachy Village Co., Ltd., and Yummy Bites Holding Ltd., which had CPCF requiring the **percentage of protein** to be stated on the ingredient list, met this criterion for all applicable products (100%). Most companies' products (92%) also met the requirement of stating the **percentage of fruit** in the ingredient list, except for PT Mulyatek Bakeri, which did not have this stated on any of its relevant CPCF. There was variability in the proportion of companies' CPCF product **names reflecting ingredients in descending order** (as per ingredient list), with an average 80% of products meeting this requirement. Three companies had CPCF assessed for the **percentage of added water** stated on the ingredient list. Products from – Kraft Heinz Co. (n=19) and Yummy Bites Holding Ltd. (n=36) had none of their products meet this requirement, while 75% of Peachy Village Co., Ltd.'s CPCF (11/15) had this percentage stated (See Annex 4 for specific criteria).

2.4.4 Labeling requirements for blended/puréed products

Only four companies were found to have blended/puréed products: PT Kalbe Farma Tbk, Kraft Heinz Co., Peachy Village Co., Ltd., and Yummy Bites Holding Ltd. However, none of their products met the requirement of including the **maximum recommended age of use of 12 months**. In addition, only PT Kalbe Farma Tbk and Peachy Village Co., Ltd.'s blended/puréed products had a spout – but neither of their spouted products included the recommended message stating children should **not suck from the container**, nor did they have any **choking hazard warning label** (See Annex 5 for specific criteria).



Summary

- The CPCF market in Indonesia has almost doubled during the past 10 years, reaching more than USD 310 million in 2022. The findings of this research show that none of the companies' assessed CPCF products fully met the nutrient and labeling requirements based on the NPM for CPCF. Therefore, none of the products are considered suitable to be marketed to older infants and young children between six months and up to three years of age.
- Approximately a third of the unique CPCF found in Jakarta belonged to local companies PT Indofood CBP Sukses Makmur Tbk (n=50) and PT Kalbe Farma Tbk (n=40). Sixty nine out of 272 CPCF belonged to Singaporean company Yummy Bites Holding Ltd. (n=39) and Swiss company Nestlé (n=30).
- Each of the four companies listed above, which collectively represent over 75% of Indonesia's CPCF market share, had less than 10% of their CPCF fully meet the NPM for CPCF nutrient requirements.
- Thirteen of the 272 unique CPCF were not assessed: nine products by three companies (Ivenet, Peachy Village Co., Ltd., and Yummy Bites Holding Ltd) were foods that should not be promoted to children under three years of age and therefore automatically 'failed' the NPM for CPCF. Meanwhile, two products (multi-vitamin honey and coconut oil) by two other companies did not fall within the categories defined by the NPM for CPCF for assessment.

Nutrient composition

- Only around 16% (n=41) of the 259 assessed CPCF met all relevant nutrient thresholds and were thus considered appropriate nutrient content.
- Most products (~90%) met the requirements for **total fat** and almost half (~48%) met the **sodium** thresholds, but only around a third of the CPCF (~34%) had **no added sugar/sweeteners**.
- Among the 15 companies selling 'snacks and finger foods', five had all their products meeting the requirement of limiting **total sugar** content to less than 15% of total energy. Yet, three companies had all their 'snacks and finger foods' exceed this threshold (overall ~55% of all the relevant assessed CPCF 'passed' this criterion).
- Although some companies' 'snacks and finger foods' did not meet the latter total sugar requirement, e.g., Nestlé, PT Indofood CBP Sukses Makmur Tbk, and Yummy Bites Holding Ltd., their other CPCF product types met applicable total sugar thresholds – and would not require a '**high sugar**' FOP **warning label**. Three out of the 10 companies assessed on the FOP warning requirement – PT Kalbe Farma Tbk, Kraft Heinz Co. and Peachy Village Co., Ltd. had CPCF requiring 'high sugar' warning labels.
- With regards to meeting requirements specific to CPCF category types, most of the relevant CPCF met **protein thresholds** (~97% of 123 products) and **fruit** content requirements (~94% of 129 products). However, only around 54% of the 33 purées met **energy density** requirements.

Labeling practices

- None of the companies' products met all labeling requirements.



- Only around 30% of CPCF met labeling requirements on the **protection and promotion of breastfeeding**, with only one company – Ivenet – having all 12 of its products meet these requirements. The majority of companies were missing **a message on the importance of continued breastfeeding up to two years of age or beyond** on their CPCF, with only around 40% of products meeting this requirement.
- All products – except for one CPCF by Kraft Heinz Co. – did not fully meet the labeling requirements around **claims**. Although the majority of the CPCF were without **disease risk reduction claims** (~99%), many companies' products did not meet the requirements of not having **non-permitted compositional claims** and **other claims** with only around 16% and 7% of CPCF meeting these labeling criteria, respectively.
- Almost 70% of CPCF met all relevant labeling requirements on **ingredient lists**. However, many products were lacking the **percentage of added water** on the ingredient list (only ~17% CPCF had this stated on their labels).
- None of the blended/puréed CPCF met any of the relevant labeling requirements, including those specific to such products with a spout.

3. Annexes

Annex 1: Commercial complementary foods per NPM-defined category and subcategory (n=272)

Category	Subcategory	% (n)
Category 1: Dry, powdered, and instant cereal/starchy food		41.2% (112)
Category 1.1	Dry or instant cereals/starch	41.2% (112)
Category 2: Soft-wet spoonable, ready-to-eat foods, typically smooth or semi-puréed packaged in jars or pouches and can be spoon-fed		12.1% (33)
Category 2.1	Dairy-based desserts and cereal products	1.5% (4)
Category 2.2	Fruit purée with or without addition of vegetables, cereals, or milk	5.9% (16)
Category 2.3	Vegetable only purée	0.4% (1)
Category 2.4	Puréed vegetables and cereals	0.4% (1)
Category 2.5	Puréed meal with cheese (but not meat or fish) mentioned in the name	0.4% (1)
Category 2.6	Puréed meal with meat or fish mentioned as first food in product name	3.3% (9)
Category 2.7	Puréed meals with meat or fish (but not named first in product name)	0.4% (1)
Category 2.8	Purées with only meat, fish or cheese in the name	0.0% (0)
Category 3: Meals with chunky pieces, often sold in trays or pots for older infants and young children		0.0% (0)
Category 3.1	Meat, fish, or cheese-based meal with chunky pieces	0.0% (0)
Category 3.2	Vegetable-based meal with chunky pieces	0.0% (0)
Category 4: Dry finger foods and snacks		44.9% (122)
Category 4.1	Confectionery, sweet spreads and fruit chews	2.9% (8)
Category 4.2	Fruit (fresh or dry whole fruit or pieces)	0.0% (0)
Category 4.3	Other snacks and finger foods	41.9% (114)
Category 5: Juices and other drinks		0.4% (1)
Category 5.1	Single or mixed fruit juices, vegetable juices, or other non-formula drinks	0.4% (1)
Category 5.2	Cow's milk and milk alternatives with added sugar or sweetening agent	0.0% (0)
Category 6: Other		1.5% (4)
Category 6.1	Other	1.5% (4)
Total unique CPCF		100.0% (272)

Annex 2. Labeling requirements on breastfeeding per company (n=259)

Company	Number of products	% Products meeting all relevant labeling requirements on breastfeeding	% Products with minimum recommended age of introduction of at least 6 months	% Products not marketed as suitable for < 6 mo	% Products with a message on importance of breastfeeding ≥2y	% Products that do not suggest superiority or equivalence to breastmilk	% Products that do not recommend or promote bottle feeding
CV. Jasmine Yogyakarta	8	0.0%	50.0%	37.5%	0.0%	100.0%	100.0%
CV. Shinta Rama	5	0.0%	100.0%	100.0%	0.0%	100.0%	100.0%
Earth Living Sdn. Bhd.	1	0.0%	0.0%	100.0%	0.0%	100.0%	100.0%
Everprosper Food Industries Sdn. Bhd.	3	0.0%	100.0%	100.0%	0.0%	100.0%	100.0%
Gasol Pertanian Organik	8	0.0%	100.0%	0.0%	0.0%	100.0%	100.0%
Healthy Foods Co..Ltd.	7	0.0%	0.0%	100.0%	42.9%	100.0%	100.0%
Ivenet	12	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%
Kalbe Farma Tbk PT.	40	0.0%	65.0%	62.5%	0.0%	100.0%	100.0%
Kraft Heinz Co	19	0.0%	63.2%	73.7%	78.9%	100.0%	100.0%
Lo Bello Fosfovite	4	0.0%	100.0%	100.0%	0.0%	100.0%	0.0%
Namchow (Thailand) Co. Ltd	2	50.0%	50.0%	100.0%	50.0%	100.0%	100.0%
Nestlé	30	70.0%	100.0%	70.0%	70.0%	100.0%	100.0%
Peachy Village Co..Ltd.	15	80.0%	93.3%	100.0%	80.0%	100.0%	100.0%
PT Hassana Boga Sejahtera	3	0.0%	100.0%	0.0%	0.0%	100.0%	100.0%
PT. Indofood CBP Sukses Makmur Tbk	50	22.0%	100.0%	66.0%	42.0%	100.0%	100.0%
PT. Monde Mahkota Biskuit	1	0.0%	0.0%	100.0%	0.0%	100.0%	100.0%
PT Mulyatek Bakeri	4	0.0%	0.0%	100.0%	0.0%	100.0%	100.0%
The HI Co., Ltd.	4	0.0%	100.0%	100.0%	0.0%	100.0%	100.0%
Happy Tummy	7	85.7%	100.0%	85.7%	100.0%	100.0%	100.0%
Yummy Bites Holding Ltd.	36	11.1%	41.7%	41.7%	38.9%	100.0%	100.0%
Total products that meet labeling requirements on breastfeeding	259	30.1% (78)	76.4% (198)	67.6% (175)	40.9% (106)	100.0% (259)	98.5% (255)



Annex 3. Labeling requirements on claims per company (n=259)

Company	Number of products	% Products meeting all relevant labeling requirements on claims	% Products without non-permitted compositional claims	% Products with no nutrient content claims	% Products with no nutrient function claims	% Products with no disease risk reduction claims	% Products with no other claims
CV. Jasmine Yogyakarta	8	0.0%	0.0%	12.5%	100.0%	100.0%	0.0%
CV. Shinta Rama	5	0.0%	0.0%	100.0%	100.0%	100.0%	0.0%
Earth Living Sdn. Bhd.	1	0.0%	0.0%	0.0%	100.0%	0.0%	0.0%
Everprosper Food Industries Sdn. Bhd.	3	0.0%	0.0%	100.0%	100.0%	100.0%	0.0%
Gasol Pertanian Organik	8	0.0%	0.0%	100.0%	100.0%	100.0%	100.0%
Healthy Foods Co.Ltd.	7	0.0%	0.0%	42.9%	71.4%	100.0%	0.0%
Ivenet	12	0.0%	0.0%	16.7%	100.0%	100.0%	8.3%
Kalbe Farma Tbk PT.	40	0.0%	32.5%	7.5%	15.0%	100.0%	0.0%
Kraft Heinz Co	19	5.3%	26.3%	84.2%	84.2%	100.0%	42.1%
Lo Bello Fosfovit	4	0.0%	0.0%	0.0%	100.0%	100.0%	0.0%
Namchow (Thailand) Co. Ltd	2	0.0%	0.0%	100.0%	100.0%	100.0%	0.0%
Nestlé	30	0.0%	0.0%	3.3%	20.0%	100.0%	0.0%
Peachy Village Co..Ltd.	15	0.0%	13.3%	86.7%	100.0%	100.0%	0.0%
PT Hassana Boga Sejahtera	3	0.0%	33.3%	0.0%	100.0%	100.0%	0.0%
PT. Indofood CBP Sukses Makmur Tbk	50	0.0%	14.0%	0.0%	56.0%	100.0%	0.0%
PT. Monde Mahkota Biskuit	1	0.0%	0.0%	0.0%	100.0%	100.0%	0.0%
PT Mulyatek Bakeri	4	0.0%	0.0%	25.0%	100.0%	100.0%	0.0%
The HI Co., Ltd.	4	0.0%	75.0%	100.0%	100.0%	100.0%	0.0%
Happy Tummy	7	0.0%	0.0%	100.0%	100.0%	100.0%	0.0%
Yummy Bites Holding Ltd.	36	0.0%	27.8%	33.3%	86.1%	94.4%	0.0%
Total products that meet labeling requirements on claims	259	0.4% (1)	15.8% (41)	31.3% (81)	65.3% (169)	98.8% (256)	6.6% (17)

Annex 4. Product name and ingredient list clarity*

Company	Number of products	% Products meeting all relevant labeling requirements on ingredient lists	% Products where product name reflects ingredients in descending order as per ingredient list	% Products with % of fruit ¹ stated on ingredient list	% Products with % of added water ² stated on ingredient list	% Products with % of protein ³ stated on ingredient list
CV. Jasmine Yogyakarta	8	87.5%	87.5%	100.0%	-	-
CV. Shinta Rama	5	100.0%	100.0%	-	-	-
Earth Living Sdn. Bhd.	1	0.0%	0.0%	-	-	-
Everprosper Food Industries Sdn. Bhd.	3	100.0%	100.0%	-	-	-
Gasol Pertanian Organik	8	100.0%	100.0%	100.0%	-	-
Happy Tummy	7	85.7%	100.0%	-	-	-
Healthy Foods Co.,Ltd.	7	71.4%	71.4%	100.0%	-	-
Ivenet	12	91.7%	91.7%	100.0%	-	-
Kalbe Farma Tbk PT.	40	75.0%	75.0%	92.3%	-	-
Kraft Heinz Co	19	47.4%	68.4%	100.0%	0.0%	100.0%
Lo Bello Fosfovit	4	75.0%	75.0%	100.0%	-	-
Namchow (Thailand) Co. Ltd	2	100.0%	100.0%	100.0%	-	-
Nestlé	30	60.0%	63.3%	84.6%	-	-
Peachy Village Co.,Ltd.	15	40.0%	40.0%	100.0%	75.0%	100.0%
PT Hassana Boga Sejahtera	3	100.0%	100.0%	-	-	-
PT. Indofood CBP Sukses Makmur Tbk	50	74.0%	76.0%	90.9%	-	-
PT. Monde Mahkota Biskuit	1	0.0%	0.0%	-	-	-
PT Mulyatek Bakeri	4	75.0%	100.0%	0.0%	-	-
The HI Co., Ltd.	4	75.0%	75.0%	-	-	-
Yummy Bites Holding Ltd.	36	58.3%	75.0%	87.5%	0.0%	100.0%
Total products that meet all labeling requirements on product name and ingredient list clarity	259	69.5% (180)	74.5% (193)	92.2% (83)	16.7% (3)	100.0%(10)

* Note where no value is presented, the '-' indicates that the NPM requirement was not applicable to the company's CPCF product type(s).

¹All products excluding category 2.3 products were assessed against this requirement.

²All products excluding category 1 and 4 products were assessed against this requirement.

³Only categories 2.6, 2.7, and 3 products were assessed against this requirement.

Annex 5. Messages on blended/puréed products*

Company	Number of blended/puréed products	% Products with maximum recommended age of use of 12 months ¹	Number of products with spouts	% Products with spout stating not to suck from the container ²	% Products with spout warning that cap is a choking hazard ²
Kalbe Farma Tbk PT.	3	0.0%	3	0.0%	0.0%
Kraft Heinz Co	13	0.0%	0	-	-
Peachy Village Co.,Ltd.	12	0.0%	12	0.0%	0.0%
Yummy Bites Holding Ltd.	5	0.0%	0	-	-
Total products that meet applicable labeling requirements	33	0.0% (0)	15	0.0% (0)	0.0% (0)

* Note where no value is presented, the '-' indicates that the NPM requirement was not applicable to the company's CPCF product type(s).

¹Only category 2 products (n=33) were assessed against this requirement.

²Only category 2 products with spouts (n=15) were assessed against these criteria.

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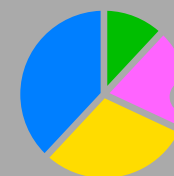
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