Overview of Indonesia

- Indonesia is the 4th most populous nation in the world with >50% of the population under age 30
- Consuming class: 45 million forecast to increase to 135 million by 2030
- GDP growth: 5.6% in 2013 - will be world’s 7th largest economy by 2030
- Severe environmental pollution and climate change

Consumer Health / Trends

- Hectic and unhealthy lifestyles – increasing diabetes / high cholesterol / high blood pressure
  Population 15 years and above – 19% overweight and obese (43 million people)/ 15% under nourished
- Unpredictable climate change (extreme heat during the dry season and a prolonged rainy season) - leading to lower body immunity (cold & flu, coughs, diarrhoea and fever)
- Prevention is better than cure – considering the high cost of medication and seeing a doctor
- People are better informed about the possible side effects resulting from the long term use of standard medicine, therefore prefer herbal products as they are considered safer due to their natural ingredients
- Traditional medicine remains popular
- Current tobacco smoking (2011): males 67% / female 3% / one of the world’s highest rates of young smokers
- Raised blood pressure (2008): males 29% / females 26.6%

Multivitamin supplementation for environmental pollution

A study conducted on 350 employees in Jakarta examined whether multivitamins containing antioxidants can reduce the frequency of acute respiratory tract infection, diarrhoea and sick building syndrome (i.e. headache, watery eyes, throat irritation etc). The employees were given the multivitamins for 3 months while others not receiving the supplement acted as the control group. The micronutrient supplement group had 49% less headache, 45% less watery eyes, 52% less nasal congestion, 27% less respiratory infection, 41% less fatigue and over all 65% less SBS symptoms.

References:
1. Austrade, Exporting Consumer Health Products to Indonesia
2. Euromonitor, Vitamins and Dietary Supplements in Indonesia
3. Euromonitor, Herbal / Traditional Products in Indonesia
4. Obesity as a poverty-related emerging nutrition problems: the case of Indonesia
6. Multivitamin supplementation reduces sick building syndrome in employees in Jakarta, Indonesia
Economic burden of non-communicable diseases (such as cancer, high blood pressure, heart problems and diabetes)\textsuperscript{578}

- US$37.2 billion a year, about 7% of Indonesia’s gross domestic product
- Number of deaths due to NCDs: Around 1.1 million (582,300 men / 481,700 women)
- Proportional mortality: CVD 37% / Cancer 13%

The direct out-of-pocket (OOP) and indirect NCDs burden on Indonesian households (billion):

<table>
<thead>
<tr>
<th></th>
<th>In 2010</th>
<th>By 2020</th>
</tr>
</thead>
<tbody>
<tr>
<td>CVD</td>
<td>1.56</td>
<td>2.09 (increase by 34.4%)</td>
</tr>
<tr>
<td>Hypertension</td>
<td>1.36</td>
<td>1.99 (increase by 46.1%)</td>
</tr>
<tr>
<td>Diabetes</td>
<td>0.81</td>
<td>1.27 (increase by 56%)</td>
</tr>
<tr>
<td>Stroke</td>
<td>0.29</td>
<td>0.45 (increase by 56.9%)</td>
</tr>
<tr>
<td>Total:</td>
<td>4.02</td>
<td>5.8</td>
</tr>
</tbody>
</table>

Vitamins and Dietary Supplements\textsuperscript{2}

Rp 14 trillion (Growth of 15% in 2013) – reaching to middle to low-income consumers

- Paediatric vitamins and dietary supplements: highest current value growth of 19% in 2013
- Vitamin C: current value growth of 19% - most popular type of single vitamin - for immune system and to help in dealing with increasing pollution
- Omega 3-6-9: current value growth of 25% - the first growing category within dietary supplements in 2013 – Raising awareness of the benefits, such as lowering risk of CVD, Alzheimer, Osteoporosis, preventing asthma and relieving early symptoms of arthritis

Herbal / Traditional Products\textsuperscript{3}

Rp7 trillion (Growth of 14% in 2013)

- Herbal cough, cold and allergy remedies – highest current value growth in 2013 at 17%
- Getting more popular- consumers see herbal products as safe and having less side effects than chemical-based medicines.

\textsuperscript{8} The Economic Burden of Self-Reported and Undiagnosed Cardiovascular Diseases and Diabetes on Indonesian Households