

A Plethora of Brand Variants Flooding a Kretek-Dominated Market: Findings From the Tobacco Pack Surveillance System (TPackSS) in Indonesia, 2022

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Background

Flavors and concept descriptors on tobacco packs are unregulated in Indonesia—one of the largest global tobacco markets. Among Indonesians who smoke, 73% use kreteks—a type of clove-mixed cigarettes that are taxed at lower rates than cigarettes. This study examines the variation in Indonesian tobacco packs' features and prices in 2022.

Methods

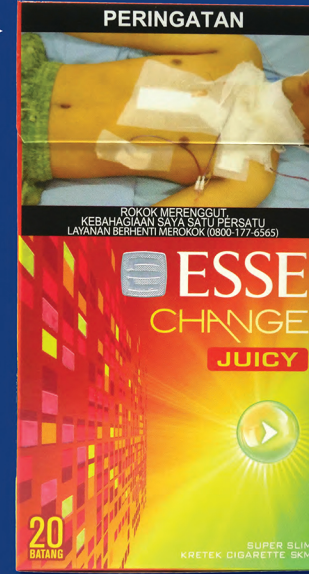
- Used a systematic protocol to purchase tobacco packs (Sept 2022) in a range of neighborhoods in three of the most populous cities in Indonesia: Jakarta, Medan, and Surabaya
- Purchased “unique” tobacco packs, i.e., packs with at least one difference in exterior pack feature (e.g., brand, # sticks, color)
- Packs assessed for a range of features, including product type, price, brand family, and capsule image
- Calculated median prices and their lower (Q1) and upper (Q3) quartiles

In Indonesia, transnational tobacco companies have adapted to the local market by **producing kretek versions of popular brands** and introducing **capsule technology** to kretek products.

Camel kretek pack (product of R.J. Reynolds) featuring a purple ball capsule image and “option purple” concept descriptor



Esse kretek pack (product of KT&G) featuring a play button capsule image and “juicy” concept descriptor



◀ View more kretek packs from Indonesia

Results

- Of 314 unique packs collected, most (83%; n=260) were kreteks, followed by cigarettes (17%, n=54)
- Of the international brands (n=51), most were kreteks (n=30) (e.g., Camel, Esse, Marlboro)
- 24 kretek packs (9%) and seven (13%) cigarette packs had capsule images that included different symbols (e.g., power switch, play button), colors, flavors (e.g., mango, caramel), and concept descriptors (e.g., “tropical sensation,” “option yellow”)
- Of the 31 packs with capsules, 20 were international brands, of which 14 were kreteks
- Kreteks were cheaper (median price IDR 19,000 or \$1.21 USD (Q1-Q3: \$0.89-1.47 USD) than cigarettes (median price IDR 29,540 or \$1.89 USD; Q1-Q3: \$1.47-2.30 USD)

Conclusions

Kreteks were predominant among the great variety of unique tobacco packs that were found in Indonesia. Transnational tobacco companies have adapted to the local Indonesia market by producing kretek versions of popular brands and/or by including capsules in kretek products. Indonesia should consider adopting plain and standardized tobacco packaging.

Authors

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