



The role of traceability in Cambodian consumers' red meat decision-making



MLA research introduction

MLA secured a grant from DAFF and the Australian government for building trust in **Australian** Agricultural traceability and credentials



Objective: To promote Australian red meat traceability and credentials in Southeast Asia



Coverage: 7 countries, including Cambodia, 4 X focus groups with purchasers of imported red meat



Outcome: Enhance market access, premium pricing, and regional capability



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Key Take-Aways

Quality is the top factor for Cambodian consumers buying red meat

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Australia's **traceability system** supports trust, providing safety and credibility

Country of Origin links closely to Quality and underpins Trust Trust in red meat is built on quality consistency and safety

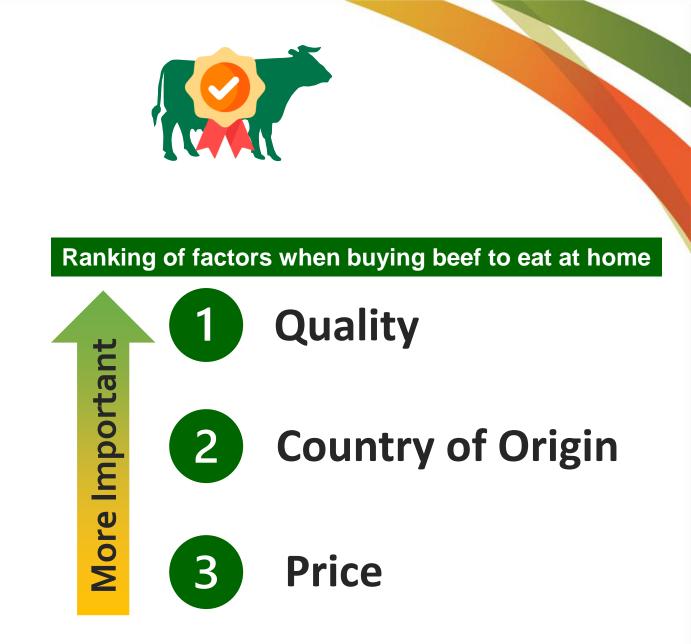
Australia is highly trustworthy, with a strong positive reputation



Quality is Cambodian consumers' top consideration factor when buying beef to eat at home.

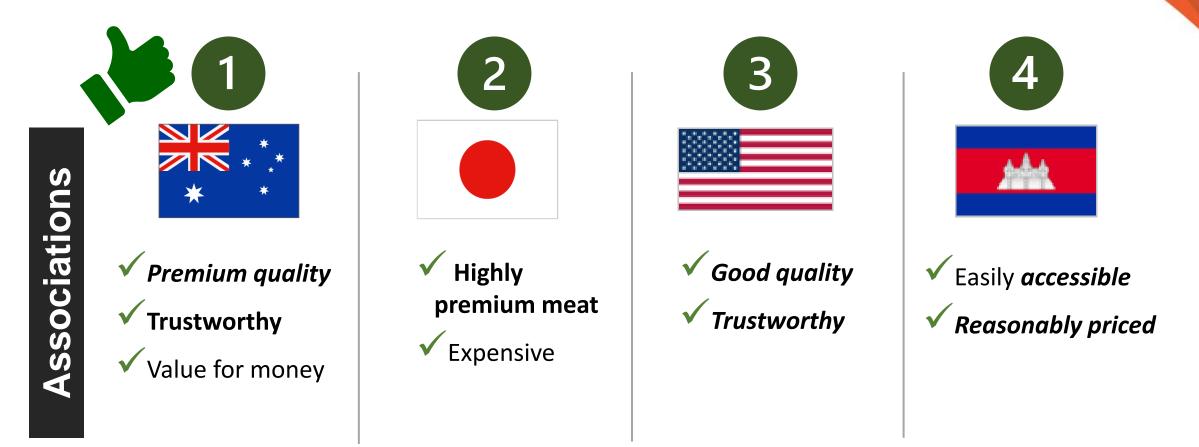
Next is Country of Origin, which delivers a level of trust to the consumer.







Country-of-origin is closely linked in Cambodian consumers' minds with beef **Quality** and **Australia is the #1 choice**





Trust shapes Cambodian consumers' red meat decision-making by providing assurance of **quality**, taste and nutrition Indicators of Trust:

Trust Quality and reputation Clear packaging, country of origin, > Quality reassurance certifications and positive experiences Retailer reputation Reduced risk on quality Past experiences and safety Simplifies decisions Consumers say they're willing to pay higher prices for a **Trusted** option vs a less



Source: 2024 MLA research into consumer purchase decision drivers for imported red meat in South-East Asia, conducted under the DAFF grant "Building Trust in Australian Agricultural Traceability and Credentials in Southeast Asia"

credible product

Traceability is seen by Cambodian consumers as a support for Trust in red meat product safety and quality consistency

Traceability

^{*} វាជម្រុញខ្ញុំអោយទិញព្រទីនជាងមុន ដោយសារដឹងពីការតាមដានសត្វ វាធ្វើអោយគុណ កាពកាន់តែកើនឡើងជាងមុន។ តម្លៃគួរតែសមរម្យ និងមានត្រប់កន្លែង" "It will encourage me to buy more because traceability is proof of quality. The price should be reasonable and the product widely available though!" (Younger, Phnom Penh) ✓ Safety

✓Quality

✓ Credibility

✓ Transparency

Ethical standards

Transparency of verifiable information across the supply chain

Source: 2024 MLA research into consumer purchase decision drivers for imported red meat in South-East Asia, conducted under the DAFF grant "Building Trust in Australian Agricultural Traceability and Credentials in Southeast Asia"



Trust

Australian beef is the best among direct* competitors, underpinned by consumers' trust in quality, prestige and nutrition

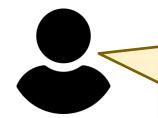
Cambodia consumer's imported Beef ranking – Top 3 Factors	
LOWER	HIGHER Aussie beef is
QUALITY - K	Australian meat tastes sweeter and is only a level below Japanese Wagyu
TRUST	Australia is slightly more trusted as sales staff can provide more compelling information about Australian products
Health & Mutrition	Australia has favourable conditions for cattle production - no natural disasters like Japan and climate similar to Cambodia
"ញុំ សាច់មកពីអូស្ត្រលី មកពីយើងជឿជាក់ និងធ្លាប់បានញុំហើយ ក៏ដូចជា មានការផ្សព្វផ្សាយ និងការចិញ្ចឹមគេ មានស្តងងររ" "I eat Australian beef because I trust it – I'm used to eating are advertisements about it and their feeding follows a high (Older group, Phnom Penh)	

Source: 2024 MLA research into consumer purchase decision drivers for imported red meat in South-East Asia, conducted under the DAFF grant "Building Trust in Australian Agricultural Traceability and Credentials in Southeast Asia" *Japanese wagyu is considered an aspirational luxury niche product consumed only on very special occasions



Lamb is not widely consumed by Cambodians. The odor of lamb is a barrier for some.

Quality is a key factor for home consumption, and linked to Freshness, which is judged by visual cues like meat colour.



" ខ្ញុំចូលចិត្តស៊ុបចៀម ឬ ក៏ឆាដូចសាច់គោដែរ។ រសជាតិអម" "I like to make lamb sour soup or stir-fried lamb, just like I do with beef. The taste with lamb is richer." (Younger, Phnom Penh)





- Country of Origin is highly important due to link with health, taste and nutrition
- Reputable countries such as Australia have less smelly & higher quality lamb compared to others

ាច់ចៀមអូស្ត្រលីមានគុណភាពល្អ ទន់ និងរសជាតិជាងសាច់ចៀមប្រភេទផ្សេងទៀត ដូចដែលខ្ញុំបានភ្នក់ នៅក្នុងអាជនីយដ្ឋាន["]"Australian lamb is softer than other lamb, which shows the good quality when I tried in hot pot buffet" (Younger, Phnom Penh)

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For more resources:

South-East Asia Red Meat Market Snapshots









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