

Project Tracy

Consumer insights and trends in relation to the purchase of red meat in key SE Asian markets

REPORT

CAMBODIA



13 DECEMBER 2024

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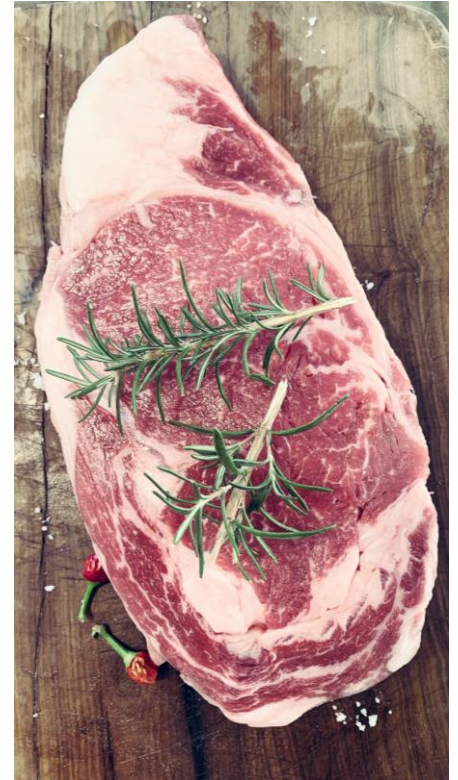
Background, Objectives & Methodology

BACKGROUND: MLA is working with the Australian Department of Agriculture, Fisheries and Forestry on The National Agriculture Traceability Grants Program

As outlined in the brief, the grant's primary purpose is to:

1. Support the ongoing development, implementation and improvement of agricultural supply chain traceability systems and arrangements for Australian agricultural exports, and enable market access and premium pricing for such exports,
2. Promote and showcase Australian agricultural traceability and credentials in Southeast Asia markets to influence uptake of agricultural traceability systems and tools that support Australia's trade agenda,
3. Build trust in Brand Australia,
4. Build regional capability, business-to-business, through technical demonstration and information sharing and engagement to enable the uptake of efficient and transparent supply chain practices in a way that is verifiable and secure, including through access to information relevant to supply chain traceability (including market intelligence and research into emerging trends) and online tools that provide research and modelling on consumer trends and commercial trading partner requirements.

With respect to MLA's project mandate in the context of the grant program's intention this is informed by the project's title: **Showcasing Australian Red Meat Integrity Systems & Credentials in Southeast Asia**



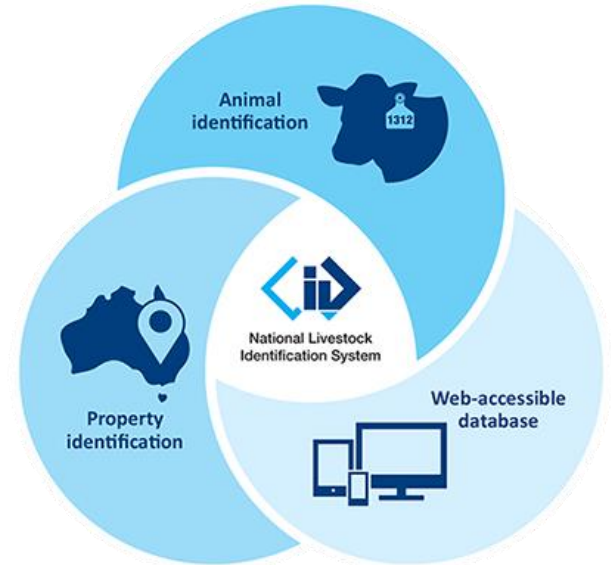
The Australian red meat industry has developed a red meat traceability system that can track all Australian red meat from birth to slaughter

The National Livestock Identification System (NLIS) is able to identify and trace cattle, sheep and goats throughout the lifespan

NLIS reflects Australia's commitment to biosecurity and food safety and provides a competitive advantage in a global market. It combines 3 elements to enable the lifetime traceability of animals:

1. All livestock are identified by a visual or electronic eartag/device.
2. All physical locations are identified by means of a Property Identification Code (PIC)
3. All livestock location data and movements are recorded in a central database

The trust placed in the Australian Red Meat sector stems from these integrity systems, which support our product's provenance and the value that arises from our commitment to animal welfare, food safety, environmental stewardship—including sustainability—and biosecurity credentials.



Source: <https://www.integritysystems.com.au/identification--traceability/national-livestock-identification-system/>

Research & Business Objectives

The overall objective is to identify drivers of consideration and trust for the Australian Red Meat (Beef, Lamb, Goat) in the context of traceability, provenance, food safety and sustainability credentials

- 1 Red meat purchase decision making
- 2 Understanding trust and quality for consumers
- 3 Importance of traceability
- 4 Perceptions towards Australian red meat

Business Objectives:

To promote and showcase Australia's red meat traceability and integrity credentials to drive greater trade between Australia and SEA. This project aims to gain a deeper understanding of how consumers perceive Australian traceability, provenance, food safety and sustainability credentials, and to leverage this knowledge to drive demand, grow preference for Australian red meat across Southeast Asia and willingness to pay a premium.

Research findings will benefit SEA and Australian businesses where results can be used to inform marketing messaging and strategies, business investment decisions to lead to competitive advantage and price premium; as well as feed into red meat industry R&D activities

Online Consumer Focus Groups were conducted in 7 key Southeast Asian markets

A total of 4 groups in each market

Respondent profile:

- Main grocery buyers, regular consumers/ purchasers of imported (including AU) beef and lamb – likely skew female
 - All to have purchased imported red meat (beef and/or lamb) mainly from modern retail but can also purchase from other retail channels - we recommend at least purchasing once per month
 - Please note, for Vietnam, as lamb consumption is lower, it was 100% beef consumers
- Income group / social class: Assume A/A+ or B+ in each market
- Age range: 18-49 years
- Ethnicity – across countries, we will mix ethnicity as per natural fallout.
 - For Malaysia specifically, we will ensure mix (Malay, Chinese, Indian) & conduct research in English



GROUP STRUCTURE: ONLINE FOCUS GROUP DISCUSSION (FGDs) – Each group will be 2 hours in length and will consist of 6 consumers	 Singapore (Singapore)	 Malaysia (KL)	 Philippines (Manila)	 Indonesia (Jakarta)	 Vietnam (HCMC)	 Thailand (Bangkok)	 Cambodia (Phenom Penh)
YOUNGER - 18-30 years (single/married, early career / 1 st jobber etc)	2 FGDs	2 FGDs	2 FGDs	2 FGDs	2 FGDs	2 FGDs	2 FGDs
OLDER 31 – 49 years (married with/without kids; mix working & housewife)	2 FGDs	2 FGDs	2 FGDs	2 FGDs	2 FGDs	2 FGDs	2 FGDs
DATES OF FOCUS GROUPS (2024)	25-26 Nov	22-23 Nov	21-22 Nov	21-22 Nov	18-19 Nov	25-26 Nov	19-20 Nov



RESEARCH FINDINGS

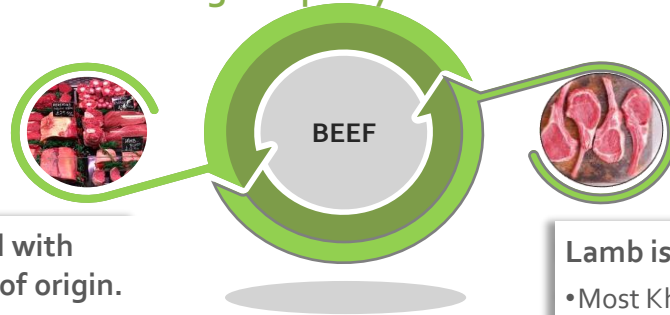


IMPORTED BEEF & LAMB CATEGORY UNDERSTANDING



Spontaneous associations – Beef more commonly consumed, while lamb is seldom chosen (only occasionally preferred by some males in the household)

Consumers perceive both imported beef and lamb has good quality



IMPORTED BEEF

- Imported beef is strongly associated with quality, closely linked to its country of origin.
- Australian beef (spontaneous recall) - has established itself as a reliable choice in the Cambodian market due to its long-standing presence and consistent quality perception among consumers at a reasonable price.
- Local meat is considered cheaper and widely available however its quality is not as reliable, nutritious and tender as imported beef.

"ខ្ញុំគិតពីសាច់ដោយស្រាល់បំផុត ដោយសារតែវាបង្ហាញឱ្យយើងឃើញ" / AU imported beef is first comes to my mind first as I have been eating it for a long time" (Older, Phnom Penh)

"ខ្ញុំប្រើវា ដោយសារវាមានសេវាជាតិជាច្រើនជាមួយភ្លើងក្រហម។ សាច់គា គឺល្អសម្រាប់សុខភាព។" / "I eat it because it is good with hotpot. It's also good for health like beef.." (Younger, Phnom Penh)

"វាគឺអ្វីដែលខ្ញុំមិនចូលចិត្ត ក៏ប៉ុន្តែខ្ញុំចូលចិត្ត ពីព្រោះខ្ញុំអាយតែងតែធ្វើវា។" / "It has strong smell that I do not like. My husband likes it so I sometimes cook for him only.." (Older, Phnom Penh)

IMPORTED LAMB

- Lamb is less often consumed by Cambodians:**
- Most Khmer dishes are prepared using beef, rather than lamb
 - Lamb is slightly more expensive than beef, more premium hence only consumed occasionally
 - Lamb also has an overpowering smell.
 - However, it has some appeal to some males (husbands of our respondents) - as they assume it has slight distinct (fatty) flavour

General Beef Usage – Mostly prepared in-home and menu usually decided by the housewife



Cambodian households primarily rely on home-cooked meals, with dining out reserved for special occasions. Family members contribute by suggesting the type of dish to prepare.

IN-HOME CONSUMPTION

- Housewives are the main decision maker in choosing meat. Husband, children and elderly sometimes will make suggestions.
- Imported meat considered more tender (so helps children who struggle to chew hard meat) and provides better nutrition.
- Word of Mouth from close friends/relatives (mostly living abroad) encourages to buy imported meat. The sellers at imported meat specialized stores and packaging label helps them as source of information.
- Generally, purchase of imported beef is 1-2 times a month and consumption is 3-5 times a month with roughly half kilo per time.
- Mostly used to make Khmer dishes such as stir-fried beef with vegetables, lok lak (Cambodian dish), beef soup, beef BBQ, steak.

OUT OF HOME CONSUMPTION

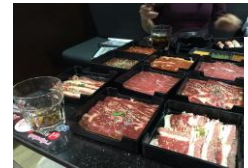
- Joint family decision to choose certain restaurants to go to.
- Most rarely eat out of home unless for special occasion – e.g. anniversary, birthday or special holiday
- When eating out, most will eat hot pot and BBQ buffet.
- Staff at the restaurant usually explain about the meat quality and the country of origin.
- After tasting the imported meat, it's different from local meat in tenderness (softness which melts in mouth), taste and there is no bad smell.
- One example mentioned is KungFu Kitchen restaurant, where they consume Australian beef.



“ខ្ញុំទិញសាច់សាបាតមកពីបរទេសមក ៗ ទិញពីផ្លូវលាភាព ៗ ព្រោះវាមានកាលបរិច្ឆេទ និងគុណភាពល្អជាងសាច់សាបាតក្នុងស្រុក បើយើងច្រឡំបានសាច់សាបាត” / “I buy beef for dishes like Lok Lak from Lucky mart as they have expiration date and the quality is better than local meat.” (Younger, Phnom Penh)



Lok Lak



“គេមានសាច់សាបាតប្រភេទនីមួយៗ ខ្ញុំចិនតែប្រើប្រាស់សាច់សាបាតប្រភេទនេះ ព្រោះវាងាយស្រួលធ្វើ និងទេ” / “They have imported beef mainly Australia in the menu. I always eat that because it is easy to boil/grill and it's soft.” (Older, Phnom Penh)



Types of dishes: Imported Beef – Quick & easy to prepare local dishes for daily consumption



For special occasions like wedding anniversaries or birthday parties, they favor Thai Mookata and hot pot or soup, which can be enjoyed with a large group.

LOCAL DISHES

DAILY BEEF DISHES



Beef Lok Lak



Beef Sour Soup



Stir fry

INTERNATIONAL DISHES



Steak

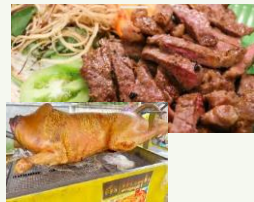
"អ្នកផ្ទះខ្ញុំចូលចិត្តញ៉ាំភាវីខ្មែរ" / "My family likes to eat stir fried." (Younger, Phnom Penh)

"ខ្ញុំទិញសាច់គោភាគច្រើនយកមកធ្វើម្ហូកខ្នុរ ។ ទិញពីផ្សារខ្នុរក៏ងាយយល់ថាមានថ្ងៃផុតកំណត់រួចហើយ បើយើងចង់បានសាច់គោល្អ" / "I buy beef for dishes like Lok Lak from Lucky mart as they have expiration date and the quality is better than local meat." (Younger, Phnom Penh)

SPECIAL BEEF DISHES FOR SPECIAL EVENTS



Roast Beef with Vegetable (Kor Loerng Phnom)



Beef BBQ



Khmer Soup Ya hon



Thai Mookata(BBQ)



Chinese Hot Pot

"ពេលមានកម្មវិធីសំខាន់ៗ យើងតែងតែទៅញ៉ាំប្រព័ន្ធសម្រាប់ ឬ ប្រព័ន្ធល្អិត ដើម្បីមានពេលវេលាជាមួយគ្នា និងសប្បាយ" / "At special occasions, we always go family eat out to BBQ or Hot Pot buffet. So we can enjoy the time together and be full." (Younger, Phnom Penh)

Beef and Lamb is interchangeable for International dishes only.. Consumers do not usually consume lamb for local dishes.



General Lamb Usage – Lamb is not widely consumed as Beef

Only 2 respondents consume lamb, and the consumption is very similar to beef but the barrier is the smell. Those who consume eat around 3-4 times a month.

IN-HOME CONSUMPTION

- Rarely consume lamb in-home because of the strong smell.
- Husband initiates to eat lamb as he has eaten outside and likes it.
- Type of dishes: Lamb sour soup and stir-fried mainly.
- Imported lamb is slightly more expensive than beef.



"ខ្ញុំចូលមិត្តភក្តិប្តីប្រពន្ធ ឬ គឺជាខ្លួនសាច់តោវែង។ រសជាតិអមផង" / "I like to make lamb sour soup or stir-fried with lamb just like beef. The taste is richer." (Younger, Phnom Penh)

"ខ្ញុំធំអីចង់ដោយអីក៏ខ្ញុំខ្លាច ដោយសារមិនចូលមិត្តភក្តិទេ វាមិនគ្រឿងទេ" / "I only cook for my husband, I do not like the smell of lamb, it's very strong unlike beef.." (Older, Phnom Penh)

OUT OF HOME CONSUMPTION

- It matches well with hotpot soup. The flavor is richer with lamb.
- Lamb BBQ and steak is also consumed at the buffets for the taste variety.
- Only occasional eat outs with family or friends.
- 1 plate(if there are 10-15 slices in a plate at restaurant) or 2-3 plates(3-4 slices in a plate at buffet).



"វាមានរសជាតិផ្កាញាញ់ល្អជាងប្រពន្ធក្នុងផ្ទះ។ វាធ្វើអោយមានកម្លាំង និងជំនួយសុខភាព." / "It tastes better in hot pot soup and it boosts energy and good for health." (Younger, Phnom Penh)



Imported meat purchase habits (for in-home) – specialized store purchase



Choronai stores are popular Cambodian premium meat and fish shops, especially for imported beef. Their strong social media presence and convenient market locations (close to popular wet markets) contribute to their popularity.



1

Choronai Stores

- ✓ Speciality- Choronai Stores offer premium beef, lamb, and seafood, especially imported beef and salmon.
- ✓ Differentiation- Their stores are designed to showcase these high-quality products using big signboards and vinyl and decent packaging design with expiration dates.
- ✓ In-person assistance- Their knowledgeable staff can provide detailed information on each product mentioning the type, origin and the quality.
- Source of information: . Conveniently located near markets and with a strong online presence, Choronai store makes it easy to purchase and learn about their offerings. There is a daily update of price and their available products on the store.

“សាច់មាត់ទៅទីផ្សារកម្រិត ខ្ញុំទិញនៅទីនោះតែណា គេដឹងណាមកពីទីនោះ ម្តាយក៏ដឹងពីទីនោះផងដែរ ព្រោះសាច់មាត់ទៅទីនោះ ព្រោះទីនោះគឺ ទីផ្សារជិតទីផ្សារ
 ជាតិមិនសូវមានប្រជាជនខ្លះទេ” / “For imported meat I go to Choronai stores, the staff
 can explain about the meat where it came from, how cows were fed and
 how the taste will be like for my dishes.” (Younger, Phnom Penh)

Sources of information for red meat – Country of origin, Nutrition and Price



Word of mouth, Country of Origin and Store physical and online presence are the key sources for in-home consumption. For out-of-home consumption, they are Menu, Staff recommendations and Influencers review.

IN-HOME CONSUMPTION

- Meat preference (according to the type of dish they are making) and meat quality is sought.
- Main sources of information
 1. Family members: Which meat to use in particular dish, e.g. Lok Lak should be made with beef.
 2. Wet market: Freshness, hygiene and price are sought and compared with imported beef.
 3. Supermarket: – country of origin, price, packaging details such as feeding regime of animal, expiration date, date of import.
 4. Recommendations from relatives abroad: credible source to understand about the nutrition (boost energy and increase red blood cells).
 5. Facebook pages (Choronai stores): Update about the availability, price, nutrition and type of meat to cook different dishes.



OUT OF HOME CONSUMPTION

- Meat quality and price is sought while eating out.
- Main sources of information:
 1. Menu description and pictures – mentions type of meat and origin.
 2. Mid and high-end restaurant staff recommendations – Explain about the softness, smell of the different types of meat.
 3. Influencer's review on Facebook – Influencers go to the BBQ/Hot Pot restaurants and order meat then explain about the nutrition of the meat and walk through the quality (softness/taste/smell) while eating. Sometimes also mention the price difference of meat in each restaurant so consumers can learn before going to the restaurant.

Purchase Decision Factors (Beef) – Quality of meat is often linked with the country of origin



In-home consumption is daily basis thus prioritizes quality + country of origin for health.

Out-of-home consumption is occasional and are tend to be expensive, thus, price is the most important factor.

IN-HOME CONSUMPTION

1

- **Quality of meat** – checked visually by the redness color, slight touch of blood to determine the freshness of beef. Using their prior experiences of buying at reliable store(Lucky,AEON) then cooking(less time consuming) and eating(softness, no smell).

2

- **Country of Origin** is important, as brings a level of trust
 - AU beef are very likely to be soft, takes less time to cook and the taste and smell is better than local beef however it's more expensive.
 - Sellers at the store, Facebook Pages and relatives who live abroad will tell them which country has the best meat quality and how it's nutritious to the body.

3

- **Price** – if too expensive, they might not be willing to buy (depending on quality). They will check the price on pack and online.

Rank by level of importance

OUT OF HOME CONSUMPTION

1

- **Price** – having budget constraint and look for products that fit with financial limits. Checking the price before ordering the type of beef to order.

2

- **Country of Origin**– show clear pictures of the food and meat(imported(AU) vs local). The colour, texture is better, and they have trust knowing that the imported beef will have better taste and takes less time to cook.

3

- **Social Influencer review** – trust the influencer's recommendation before going to the restaurant. They often mention the taste, smell and chewiness of the beef during their vlogs. So consumers have sense of social proof before ordering.
- Checking on social media like Restaurant Facebook pages to see the menu if they have imported beef and at what price.

Purchase Decision Factors (Lamb) – Driven by strong and rich Taste



Taste is the driver to interchange beef with lamb. However, smell is the key barrier for non-lamb consumers.

IN-HOME CONSUMPTION

- Quality of meat: The freshness (red colour of meat) is checked visually.
- Interchange beef with lamb into daily dishes such as sour soup and stir-fried with vegetable.
- As they have tried lamb at the restaurants, they try to cook it in home replacing beef.
- Most of the household members (especially females) do not like the smell of lamb.

*“មើលទៅលើពណ៌ស្រស់ និងគុណភាព ក៏ដូចជា តែមួយ តែមួយ មួយបើសិនជាទៅសាច់ជ្រូក ដោយសារតែមានរសជាតិខ្លាំង”
/ “Checking freshness and quality is the same as beef, I am just changing beef dishes into lamb dishes because of its rich taste.” (Younger, Phnom Penh)*

OUT OF HOME CONSUMPTION

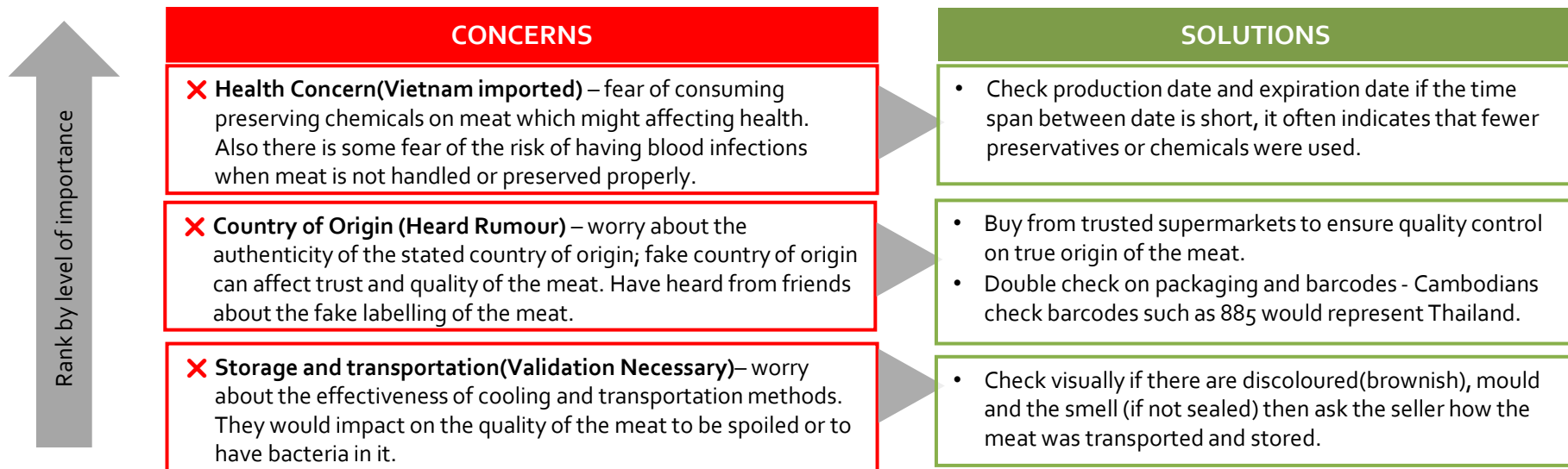
- Taste: Lamb consumers want to try the taste variety and they assume lamb tastes heavier and richer than beef.
- They tried it at the Hot Pot/BBQ buffet restaurants.
- Relatives also recommend to try it during the eat-outs.

*“បងប្អូនខ្ញុំនិយាយថាខ្ញុំចង់ ត្រូវបានណែនាំឱ្យសាកល្បង ដូច្នេះខ្ញុំសាកល្បង ហើយក៏ចូលចិត្ត.” / “My relatives say that it boosts energy, so I tried it and I like it.”
(Older, Phnom Penh)*

Concerns about red meat consumption – Health concerns (around preservatives) and authenticity on country-of-origin claims



The concerns raised, while mild and impersonal, stem from the potential risks of buying from unfamiliar stores



“វាអាចខុសទៅតាមប្រទេសនោះ បើបើប្រទេសណាមួយ ខ្ញុំមិនជឿទេដោយសារពួកគេក៏មិន
ត្រូវទេ” / *Depends on the country if Vietnam, cannot trust as they may contain chemicals.* (Older, Phnom Penh)

“ខ្ញុំធ្លាប់ឮថាមានមនុស្សម្នាក់ម្នាក់ទៀត ដោយដាក់ម្ជាញ់ក្នុងក្របខ្លួន មិនបរិយចាត់ខ្ញុំមិនហ៊ានទិញទៅទីកន្លែង
ទាបទេ” / *I have heard once that there are fake imported meat with fake label so I do not buy at other small marts.* (Older, Phnom Penh)

“ប្រសិនបើស្ថានភាពមិនស្អាត មិនត្រឹមត្រូវ មិនមានការត្រួតពិនិត្យ វាអាចខូចបាន វាអាចខូចបានដោយធម្មតា” / *If the meat is not stored in a clean and cooling storage, it can be spoiled. The meat can also be spoiled on the way to the store* (Younger, Phnom Penh)

“ខ្ញុំទៅហាងដែល មិនប្តី ទើបទិញសាច់ដា ដោយសារសាច់មានការត្រួតពិនិត្យ ដូចពាក្យនិយាយរបស់គេ មិនមែន
ទើបទិញទេ” / *I only go to the well-known stores to buy imported meat as they have QC checks like removing expired products on the shelf daily.* (Younger, Phnom Penh)



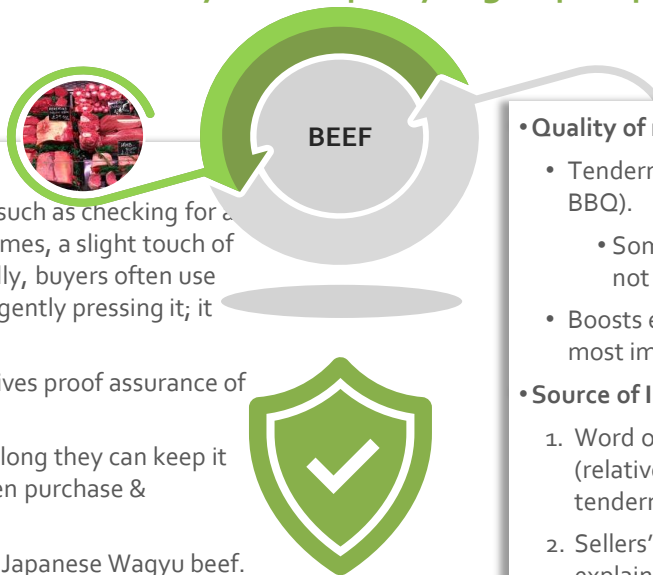
Understanding Quality, Trust & Traceability

Definitions of Quality – Consumers prioritize visual validation of freshness, expiration date, and country of origin



Freshness, country of origin and Expiration date mainly defines quality. Higher price points and storage method can also impact perceptions on quality

BEEF



Definition of Quality:-

1. **Freshness** is validated through visual inspection, such as checking for a bright red color and avoiding brown hues. Sometimes, a slight touch of blood is considered a sign of freshness. Additionally, buyers often use their experience to assess the meat's firmness by gently pressing it; it should be springy, not too soft.
2. **Country of Origin** - Japan, Australia or America gives proof assurance of good quality
3. **Expiration date** as a reference to determine how long they can keep it in the fridge and assess its freshness (time between purchase & expiration dates)
4. **Higher price point** can also indicate quality – e.g. Japanese Wagyu beef.
5. **Packaging & Storage** – Airtight sealing to prevent contamination. Must be kept in cold and clean place to maintain the quality at all time.

• Quality of meat is important because it impacts:

- Tenderness – must be easy to cook and chew (e.g. stir fry, steak, BBQ).
- Some claim that quality beef can be so soft that they do not need to boil much when preparing Hot pot (
- Boosts energy and provides nutrition to the body. Health is the most important for the family.

• Source of Information:

1. Word of mouth & recommendation from trusted people (relatives, especially those living abroad) told them the tenderness quality of the imported meat.
2. Sellers' recommendation (Choronai store, Makro), as they can explain in detail – which type of meat to use in which kind of dishes, etc.
3. Social media (seller's Facebook pages and Youtube ads) to check information in detail to see the price and the quality mentioned in the post.

"ខ្ញុំធ្លាប់ស្រាវជ្រាវម្តង ដូច្នោះហើយទើបខ្ញុំដឹងថាមានដើមទាល់ ហើយទុកតាមដងកាំ។ ម្តាប់មកខ្ញុំដឹងថាទាល់ដើម ប្រយោជន៍ មិនកាយដើមទាល់ទេ" // I have bought beef for a long time, so I check the colour and press it gently. Then I can check the product label to see Country of origin and expiration date." (Older, Phnom Penh)

Trusted recommendations, whether from sellers, relatives, or social media, further reinforce their confidence in making informed choices.

"សាច់គោមាត់ត្រូវបានកម្តៅ ដូច្នោះអាចមានផលប៉ះពាល់ដល់សុខភាព ហើយជីវិតមិនល្អ វាមិនផ្តល់ធនធានដល់សុខភាព ដែលធ្វើឱ្យមានផលប៉ះពាល់ដល់សុខភាព" // The good quality of beef will boost the energy and if it's not good it will have side-effect on health which is more costly." (Younger, Phnom Penh)



Definition of Trust – Key Finding

Trust is built by the history of importing the quality products only with no concern about the defects. Therefore, the company must provide consumers quality first and consumers will their give trust back.



- **Overview:** Trust depends on the quality, country of origin, detail information provided on the packaging and the actual experience after consuming the meat.
 - Packaging - Clear packaging helps ensure the meat's freshness displaying the redness of meat. Should include import details and expiration dates
 - Country of origin – The importing country's long-standing reputation and the popular choice of consumers.
 - Quality - Quality control checks from the Ministry of Health and Malls build trust.
 - **Trust is vital as it shapes repetitive purchase behaviour once established** – it gives assurance to buy the meat trusting it will taste good and nutritious.
 - Buyers are willing to pay a premium (e.g., \$2 more for \$7 meat) if trust is fully established after buying and consuming and gaining satisfaction.
- **Trust comes from Experience, Sellers at supermarket, and social media.**
 - **Experience** –After buying and consuming one time and the quality meets the expectation, trust is established.
 - Sellers – Reliable recommendations and provides quality
 - **Facebook Page**– Provides price and type of meat. Also provides detail information such as how the animals were fed, how they were kept in farm and how they were exported then imported to Cambodia.

Trust in imported meat hinges on quality, country of origin, and clear packaging details, such as expiration dates and QC checks. Familiarity with the brand, positive experiences, and reliable recommendations from sellers or social media foster confidence, even leading buyers to pay a premium for trusted products

"វាមានទម្រង់ប្រយោជន៍ គេត្រូវបានយកមកលក់ដោយយើង ហើយយើងនឹងផ្តល់ការជឿទុកចិត្តទៅក្រុមហ៊ុនវិញ" / "It's give and take. They provide the quality to us and we give the trust to them." (Older, Phnom Penh)

"សាច់គោអូស្ត្រាលីមានឆ្ងៃច្រើនហើយ និងមានតម្លៃថ្លៃថ្នូរល្អ ដូច្នេះហើយយើងមិនខ្លាចទេ" / "AU meat is here for a long time and many people like it already so it's trustworthy." (Older, Phnom Penh)

"វាជាសកលកម្មដូចជាដទៃទៀត ដូចជាយើងទុកចិត្តក្នុងការជឿជំនឿទៅក្រុមហ៊ុន គឺជាសាច់គោអូស្ត្រាលី វាជាស្តីប្រយោជន៍ស្រាប់ គុំគិតពីសាច់គោអូស្ត្រាលីមួយទៀត" / "After trying once and I'm satisfied with the taste, so I trust it enough to buy again E.g. AU beef whenever we talk about steak, it comes to my mind first." (Younger, Phnom Penh)

"វេជ្ជ យុវករមួយរូបមិនសូវ ដែលធ្លាប់ជឿទុកចិត្ត ណាម៉ែតាមការ គុំគិតទុកចិត្តក្នុងការ" / "My trusted Facebook Page/Influencer do food reviews so I think I can trust on them." (Younger, Phnom Penh)

Sources of Information about Trust – Mostly from personal experience, the seller reputation and social media exposure.



The familiarity, store reputation, information on the packaging label and social media exposure are the major drivers of trust.



Source	Information Received	Recalled Information	Credibility
Personal Experience	The famous marts and malls provide trust that has fostered already. The familiarity of the country of origin. Quality – The repeated buying behaviour validates the consistent quality of the imported meat.	Never had an experience with defects of product.	Most credible; based on direct outcomes.
Sellers - Supermarkets/Store Reputation	Suggests which meat is suitable for certain dishes. Recommend the quality based on the country of origin. Expiration dates on the label.	Trusted stores like Lucky, Aeon, Chip Mong are linked to quality and reliability. Stores in cool storage and are clean.	Highly credible; trusted for consistent standards. – Long lasting in the market, always dispose the expired products and are too big to fail.
Imported meat specialized shops	Product knowledge regarding the feeding regime, quality of meat and freshness of the display meat.	Transparency of quality and price.	Credible due to decent number of stores and always have fresh products with expiration dates.
Packaging Labels	Country of origin, Expiration date, date of import	How cows were fed The taste of meat	Credible if it was sold at the reputable supermarkets/stores
Social Media (Facebook)	Provides price and type of meat. Also provides detail information such as how the animals were fed, how they were kept in farm and how they were exported then imported to Cambodia.	Image, video contents with narration providing the transparency of the product quality and price. Sometimes live streaming.	Credible if there are high number of followers, engagement with comments and high responsiveness to customer order and feedback.

“សុខភាពគឺជាដំបូង ខ្ញុំតែងតែទិញម្ហូបល្អពីលក់ដាច់ដោយផ្ទាល់ខ្លួន ដើម្បីជៀសវាងការប្រើប្រាស់ផលិតផលដែលមានគុណភាពទាប ឬមានគុណភាពទាប។” *“As the health is important, I usually buy the food products at the famous marts and malls only”* (Older, Phnom Penh)

“ម៉ាកដូចជាឃ្លាក់ក៏ តែងតែផ្តល់សេវាដល់អតិថិជនរបស់ខ្លួនយើង និងទុកដាក់ជាលក់ដាច់ផ្ទាល់។” *“Marts like Lucky always keep good quality and they store well”.* (Younger, Phnom Penh)

“ខ្ញុំទិញនៅលើបណ្តាញដោយសារតែមានមនុស្សច្រើនទិញនៅលើបណ្តាញដូច្នោះ ហើយបុគ្គលិកនៅទីនោះក៏មានចំណេះដឹងខ្ពស់ ហើយមានការត្រួតពិនិត្យផលិតផលយ៉ាងហ្មត់ចត់។” *“I buy at Choranoi stores because they are specialised in imported meat and they have well-trained staff and decent storage for meat.”* (Older, Phnom Penh)

“ខ្ញុំតែងតែប្រុងប្រយ័ត្នខ្ពស់ ខ្ញុំតែងតែពិនិត្យមើល តើមានព័ត៌មានអំពីប្រភពដើម ឬទេ ហើយខ្ញុំតែងតែពិនិត្យមើល តើមានព័ត៌មានអំពីថ្ងៃផុតកំណត់ ហើយខ្ញុំតែងតែពិនិត្យមើល តើមានព័ត៌មានអំពីថ្ងៃផុតកំណត់ ហើយខ្ញុំតែងតែពិនិត្យមើល តើមានព័ត៌មានអំពីថ្ងៃផុតកំណត់។” *“I check the COO on the label and check expiration date and date of import. If anything is missing, it's not trustworthy.”* (Older, Phnom Penh)



Reputation of the country is important.

Consumers are highly aware of the COO and significantly enhances the purchase decision to buy from the reputable countries.



BEEF:

- The country of origin is highly correlated with meat quality. Reputable countries(AU, JP and USA) prioritize consumer health, recognizing it as a family's most valuable asset as it's expensive to maintain. The main sources of awareness are packaging label, sellers at supermarket and specialized stores, BBQ/Hot Pot restaurant menus, relatives from abroad and online sellers posting product and price on Facebook.

Highest awareness: Australia, Japan and Australia.



Lower awareness: Vietnam and India



Online shops selling red meat with country flags.



LAMB:

- Similar to beef, lamb's COO is highly important due to the same reasons such as health, taste and nutrition. The major difference is the smell, the reputable countries such as AU, JP and USA have less smelly meat compared to local lamb.

Highest awareness:



Lower awareness:







illuminate Packaging label displays the highest source of awareness. The importance of COO is driven by sellers' recommendation, word-of-mouth and online meat shops.

Spontaneous association of COO – Australia is best- associated with imported meat attribute



Australia is the most preferred for both beef followed by Japan and America.

Rank by level of preference overall

COUNTRY	ASSOCIATIONS:
 Australia	<ul style="list-style-type: none"> • Spontaneous associations – Good quality(soft) and tasty imported beef. • Overall – Best choice of imported meat for price to performance ratio. ✓ Positives – Value for money, consistent quality, trustworthy. ✗ Negatives – None. • Communications recalled –Product Label, Staff at the mart/restaurant recommendation and Facebook/YouTube contents.
 JAPAN	<ul style="list-style-type: none"> • Spontaneous associations – Care for health, High premium meat • Overall – Japan cares about health, and they have A5 Wagyu beef. ✓ Positives – No doubt about quality. ✗ Negatives – Very expensive. • Communications recalled -
 America	<ul style="list-style-type: none"> • Spontaneous associations – Durable quality(long lasting), Trustworthy. • Overall – Strong reputation ✓ Positives – Good quality, no side-effect to the health. ✗ Negatives – Buy cows from other countries and process in their countries. • Communications recalled -
 Cambodia	<ul style="list-style-type: none"> • Spontaneous associations – Cheap, not very hygienic. • Overall – Decent choice for day-to-day cooking. ✓ Positives – Price is reasonable and very widely available. ✗ Negatives – No QC check, no proper feeding regime and storage place is unsanitary.

គុណភាពសាច់ដាច់ដំបូងប្រទេសអូស្ត្រាលី គឺមានតម្លៃសមរម្យបំផុត។ គុណភាពសាច់ដាច់ដំបូង ក៏មានគុណភាពសាច់ដំបូងបំផុត និងគុណភាពសាច់ដាច់ដំបូងប្រទេសអូស្ត្រាលី។ ប្រភេទសាច់ដាច់ដំបូងប្រទេសដំបូងមានគុណភាពល្អបំផុត ប៉ុន្តែឆ្លាស់ពីពួកវាមានអ្វីខុសៗ (Younger, Phnom Penh) / *"AU meat quality is the best in the price range. USA meat quality is less than AU. Japan meat quality is good but have only tried at Udon shop"* (Younger, Phnom Penh)

“ចំណុចល្អ សាច់ដាច់ដំបូង មានគុណភាព ហើយ ប្រទេសនេះក៏សាងកេរ្តិ៍ឈ្មោះល្អមកហើយ” / *"The good point of meat from Japan is quality as this country have been building good reputation"* (Young, Phnom Penh)

“ចំណុច មិនល្អ សាច់ដាច់ដំបូង ព្រោះវាមានតម្លៃខ្ពស់ មិនសូវមានគុណភាព និង ពិបាកទិញ” / *"The bad point meat from Japan is it's really expensive and less people bring it sell in Cambodia also it dose not more available"* (Older, Phnom Penh)

Overview: Comparison of Countries on key factors (Beef) – AU leads the most factors except Price.



Australia leads due to its good relationship with Cambodia, similar climate and established consumer familiarity.

FACTOR	LOWER	HIGHER	REASON FOR AU RANK
QUALITY			<ul style="list-style-type: none"> AU meat tastes sweeter(natural) and it's only a level below Japanese Wagyu.
PRICE			<ul style="list-style-type: none"> It is cheaper than Japan and America, but the taste is sometimes better.
TRUST			<ul style="list-style-type: none"> AU is slightly more trusted as the staffs can clearly explain about the AU products more.
FOOD SAFETY			<ul style="list-style-type: none"> Australia is almost the same as Japan however Japan is well-known for its strict regulations regarding the health.
ANIMAL WELFARE			<ul style="list-style-type: none"> Proper feeding regime, decent farm space and health check for cows.
PRESTIGE / STATUS			<ul style="list-style-type: none"> Australia has good reputation and relationship with Cambodia regarding education.
HEALTH & NUTRITION			<ul style="list-style-type: none"> Australia do not have natural disasters like Japan. Its weather is similar; therefore, cows will grow up under the similar condition as Cambodia.

Trustworthiness of country of origin – Japan, Australia, or America are highly trustworthy country of origin



Trust in each country stems from product experience and reputation built via news and social media.



HIGH



LOW



For its high-grade Wagyu (very expensive and socially advertised as the premium meat) and other imported products such as skincare, cosmetics are trustworthy.



A long-time supplier at reasonable prices and widely available. Delivering consistent quality.



Good quality but not widely available and more expensive compared to AU.



Quality is not ideal and hygiene needs improvement but acceptable for its price range.



Have not tried personally however, India is perceived as not very hygienic and sanitary due to social media and news.



Do not trust the quality of Vietnamese products as most of household products do not last long.

“ប្តី សាច់មកពីអូស្ត្រាលី មកពីយើងរៀបចំ និងប្តាប់បាតប្តាប់ហើយ ក៏ដូចជា មានការផ្សព្វផ្សាយ និងការចិញ្ចឹមតាមស្តង់ដារ” / “I eat Australia meat because I trust on it and used to eat as well as there are advertisement about it and their feeding follow the standard” (Older group, Phnom Penh)

រៀបចំអីសាច់មកពីប្រទេសអូស្ត្រាលី ទាំងមកពីអាមេរិក ប្តីផ្លូវរៀបចំសាច់មកពីអូស្ត្រាលី ជាងគ្រោះទទួលបានខ្លះពីមាត់មាត់មិនត្រូវបានណែនាំពីអ្នកលក់អ្វីឡើយ (Younger, Phnom Penh) / “Trust both Australian and USA but Australia is slightly more as I have more information regarding Australian from the sellers.” (Younger, city)

“សាច់មកពីឥណ្ឌា ខ្ញុំគិត ថាដូចជា មិនសូវមានការផ្សព្វផ្សាយ មិនមានអ្នកលក់ចូលមកប្រើទេ ណាមួយ ការគិតរបស់យើង យល់ថា ឥណ្ឌាអត់ស្អាត មិនសូវមានអាយុវ័យ” / “I think I rarely see the advertisement meat import from India, and seems it's less import. The important thing is India is not clean and do not have sanitation” (Older group, Phnom Penh)

Overview: Comparison of Countries on key factors (Beef vs Lamb) – Consumer Verbatims



BEEF

LAMB

សាច់ត្រីអូស្ត្រាលីជាត្រីដ៏ស្រស់ និងផ្អែមជាងសាច់ត្រីអាមេរិក។ អាចទាក់ទុកជាប្រភេទសាច់ត្រីដ៏ល្អបំផុតក្នុងស្ថានភាពស្រស់។ (Older, Phnom Penh) / *Australian meat is tastier, it is sweeter than USA meat. It's a top-notch level* (Older, Phnom Penh)

ប្រជាជនអូស្ត្រាលីយកការថែទាំសុខភាពជាអាទិភាពខ្ពស់ ដូច្នេះពួកគេធ្លាក់ចុះទៅលើគុណភាព និងសុវត្ថិភាពនៃផលិតផលស្រស់ពួកគេហើយ។ (Older, Phnom Penh) / *Australian people prioritize their health so the meat they produce are very likely to be good for health too.* (Older, Phnom Penh)

សាច់ត្រីអូស្ត្រាលីគឺជាទំនុកចំណីប្រភេទសាច់ត្រីដ៏ល្អបំផុតក្នុងស្ថានភាពស្រស់ ពីព្រោះវាមានការវិភាគ និងការធ្វើត្រួតពិនិត្យជាប្រចាំ ការតាមដានសុខភាពសត្វចិញ្ចឹម និងទិន្នន័យវាយតម្លៃក្រុមហ៊ុនស្រដៀងគ្នាជាមួយការវិភាគគុណភាពសាច់ត្រី។ (Younger, Phnom Penh) / *Australian meat is considered premium because they follow international standard of feeding, monitor the health of cow and import officially through government QC checks.* (Younger, Phnom Penh)

សាច់ត្រីអូស្ត្រាលីមានតម្លៃថោកជាងសាច់ត្រីប្រទេសដទៃ។ តម្លៃរបស់វាសមរម្យ និងអាចទទួលយកបាន។ (Older, Phnom Penh) / *"Australian meat price is cheaper than other countries. Its price is reasonable and acceptable."* (Older, Phnom Penh)

ទឹកដីអូស្ត្រាលី និងអាកាសធាតុនៅទីនោះគឺមានភាពប្រហាក់ប្រហែលទៅនឹងប្រទេសយើងដែរ។ ប្រទេសអាមេរិក និងជប៉ុនជាប្រទេសត្រជាក់ ដូចនេះហើយការធ្វើត្រួតពិនិត្យសុខភាពសត្វចិញ្ចឹមដូចយើងឆ្លើយ។ (Older, Phnom Penh) / *"Australian land and weather is similar to us, USA and Japan are colder so the cows condition will not be the same to match with us."* (Older, Phnom Penh)

សាច់ត្រីអូស្ត្រាលីមានគុណភាពល្អ ទំនុកចំណីជាងសាច់ត្រីប្រទេសដទៃទៀត ដូចនេះស្ត្រីបានគូសក្រែងក្នុងការជិះម្នាក់ៗ។ *"AU lamb is softer than other lambs which shows the good quality when I tried in hot pot buffet"* (Younger, Phnom Penh)

"ខ្ញុំចង់បានសាច់ត្រីដ៏ស្រស់ដើម្បីប្រទេសដទៃ ខ្ញុំគ្រាន់តែទិញសាច់ត្រីអូស្ត្រាលីទៅពីពេលខ្ញុំស្ត្រីខ្ញុំចង់បានសាច់ត្រីដើម្បីប្រទេសដទៃទៀត ខ្ញុំគ្រាន់តែទិញសាច់ត្រីអូស្ត្រាលី។ " / *"I have not tried other countries lamb, I just buy Australian lamb when my husband asks me to cook lamb, because I have experience buying Australian beef"* (Older, Phnom Penh)

Australia on Trust & Quality – Trustworthy and Reliable Quality for Cambodians



Australia's reputation for trust and quality stems from consistent standards, strong traceability, and rich flavor, making it a preferred choice among Khmer consumers.



- **TRUST** – Well-established and reputable country.
 - Australia has a long-standing reputation among Khmer consumers, making it a trusted source for meat products.
 - Consistent quality and reasonable pricing.
 - Positive word-of-mouth: Sellers and relatives abroad often recommend AU meat for its reliability.
 - Strong traceability: Australia's strict adherence to international livestock standards, combined with similar climatic conditions to Cambodia, ensures the quality and safety of its beef.
 - Diplomatic ties: Australia's partnership with Cambodia in education programs further strengthens trust.
- **QUALITY** – Rich in flavour, tenderness, safety and hygiene.
 - Australian beef is renowned for its rich, sweet flavor, tender texture, and adherence to strict international quality control standard for consumption.
 - It is easy to chew and lack of unpleasant smell makes the children love it more.
 - Communication: Sellers and Facebook influencers mainly communicate that the AU meat for its taste, texture and price at the shop and on online(Facebook).

" អ្នកប្រើប្រាស់យើងតែងតែស្គាល់និងទទួលបាននូវគុណភាពខ្ពស់ និងមានសុវត្ថិភាពខ្ពស់ ដោយសារតែការគ្រប់គ្រងគុណភាពខ្ពស់របស់អ្នកប្រើប្រាស់យើងនេះគុណភាពគ្រប់គ្រងគុណភាពខ្ពស់របស់អ្នកប្រើប្រាស់ស្រាប់តែគុណភាពខ្ពស់បំផុត " / "Australian follows international standard of feeding and maintaining health of the cows, so the meat quality is reliable for our health" (Younger, Phnom Penh)

" ពួកយើងធ្លាប់ស្គាល់ និង ម្នាក់ៗក៏មានចំណេះដឹងអំពីសាច់គោអូស្ត្រាលី។ សាច់គោអូស្ត្រាលីមានតម្លៃខ្ពស់ជាងគោដទៃទៀត គុណភាពខ្ពស់បំផុត " / "We are more familiar, and sellers have more knowledge about the Australian meat. It has been around for a long time and the quality never changes" (Older, Phnom Penh)



Traceability – Spontaneously only few are aware of this term

Not very much aware of the term but consumers have heard similar to that after probing.

Traceability explains the clear process of imported meat which fosters trust and could influence purchase decisions.



SPONTANEOUS: Only a few of the consumers know right away that it is the ability to track from how cows were fed to how they were imported to Cambodia.

- Have heard about this kind of process from YouTube and the Chronai (imported meat specialized) stores. The sellers explain the process in detail to describe the quality of the meat and why is it suitable for the dishes. It helps consumers to make quicker decisions as it fosters trust on the quality of the meat due to transparency of the manufacturing process.

PROMPTED: Most of the consumers are aware of it but not used to the term.

- **Comprehension:** It has the international standard with the system of raising the cow which translates to the credibility of the meat.
- **Importance:** Most claim it is important to know detailed information of the food they will consume as it's directly related to their health. It can also help to make informed decisions as it fosters trust on the quality of the meat due to transparency of the manufacturing process.
- **Communication–** Most expect communication via social media (Facebook/YouTube) with videos. Sellers to provide product knowledge while shopping. Restaurant staffs to explain thoroughly before ordering.
- **Key messages**
 - Shows clear visualisation of the process (from physique of the cow, feeding regime & transportation methods) – better to display in video as they can listen to the narration and more interesting to watch the live action instead of pictures.
 - To enhance credibility, there should be Ministry of Health approval or the international organizations QC check process included

"យើងគួរដឹងពីប្រភពនៃសាច់ដដែលយើងទទួលបាន ដើម្បីធានាថា វាមានសុវត្ថិភាព និងមានផលប្រយោជន៍ដល់សុខភាពរបស់យើង" / "Knowing the source of meat that we put into our body is important. We can trust on how it will contribute to our health" (Older, Phnom Penh)

"យើងអាចដឹងពីសុខភាពរបស់វា និង ដឹងថាវាមានវ៉ាក់សាំង អត់" / "We can know the health of the cows and whether they're vaccinated or not" (Older, Phnom Penh)

"ក្នុងលីករមានព័ត៌មានលម្អិតល្អបំផុតប្រសិន ព្រមទាំងមានការពិពណ៌នាប្រយោជន៍សម្រាប់ការជ្រើសរើសម៉ាកដែលមាននិរន្តរ៍ប្រកបដោយសុវត្ថិភាព" / "Staffs at Chronai store explained to me like this, it makes me easier to choose the brand that is traceable" (Older, Phnom Penh)

"Traceability is the ability to trace and track meat products from their source animal from growth and feeding, slaughter, processing, and distribution, to the point of sale or consumption, in a comprehensive manner".

Aussie Beef & Lamb Labelling – Providing exact dates, bar code and Khmer description boosts consumers' confidence to purchase



Consumers do not understand the logo image due to its asymmetrical shape. However, the packaging label is unique for providing all necessary information (which is not seen much in the market) to build consumers' trust.



"ខ្ញុំស្រឡាតែអក្សរខ្មែរទេ គេដាក់ សាច់គោ និងសាច់ជ្រូកអូស្ត្រាលី" / "I only read the Khmer letters, it says beef and lamb from Australia" (Younger, Phnom Penh)

"ខ្ញុំមិនយល់រូបរាងសាច់គោ រហូតមិនចាប់អារម្មណ៍សម្រាប់ខ្ញុំទេ ។ គេគួរតែផ្លាស់ទៅលើទម្រង់ជាតិអូស្ត្រាលីប្លែកៗ, I do not understand the logo shape and it's not attractive for me. It should focus on Australian flag instead" (Older, Phnom Penh)



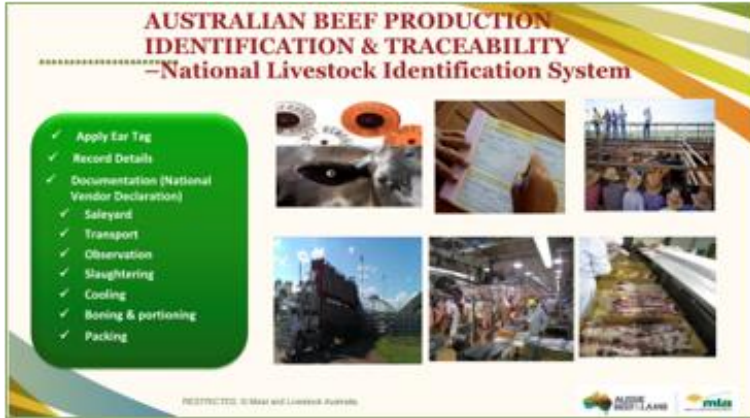
- Spontaneously consumers do not recall the brand name and logo
- Consumers understand it's Australian beef and lamb due to Khmer description. They tend to skip reading the English words.
 - The logo is not easy on the eyes for consumers (they don't recognise the Australian map). It is not proportionate enough to figure out what it's describing. They find it hard to explain/do not understand what the logo is.
- They think the logo itself is unique as most of them haven't seen such shape before. However, they usually do not look for the brand logo when purchasing, they mainly check the country flag instead.
- **Satisfaction:** The dates, bar code, feeding regime and QC check of the product on the label helps in making the informed decision based on the trust building factors.
- **Trust building factors(label):**
 - Khmer letters are easy to read, English would be difficult.
 - Exact dates of slaughter, packed and expiration date on the label to confirm the freshness.
 - Bar code to confirm the origin of country.
 - Nutrition of cow: cows were fed with grain, therefore more nutritious and healthier.
 - 9999 Australia Inspected: describing that it was quality control checked already.

- Improvements recommended:**
- To put QR code to gain more trust: as packaging label can be faked, QR code can validate the authenticity of the product by looking it up to see the brand's legitimate website/Facebook page /post
 - Australian flag: Not often check the brand name but check the flag instead to confirm COO at a glance. To help realize the country of origin for the ease of purchase decision making journey while choosing.



Australia's Red Meat Integrity System establishes trust, as it details transparency of the manufacturing process

Consumers are not very familiar but are aware of such system. Transparency is somehow translated to honesty which fosters trust in the consumers' mind regarding the welfare of the cow and transportation of the product.



"ព័រម្រូប្តូរខ្ពស់នៃការបញ្ជាក់ពីដំណើរការ អាចជួយកាត់បន្ថយការខ្វះខាតនៃការយល់ដឹងពីការធានាគុណភាព ព្រមទាំងជួយកាត់បន្ថយការខ្វះខាតនៃការយល់ដឹងពីការធានាគុណភាពក៏ដោយ។ តម្លៃខ្ពស់នៃការធានាគុណភាព គួរតែមានតម្លៃសមស្រប និងមានការយល់ដឹងគ្រប់គ្រាន់" / "It will push me to buy more because traceability proves quality. The price should be reasonable and widely available though"
(Younger, Phnom Penh)

"វាមានព័រម្រូប្តូរខ្ពស់នៃការបញ្ជាក់ពីដំណើរការ អាចជួយកាត់បន្ថយការខ្វះខាតនៃការយល់ដឹងពីការធានាគុណភាពក៏ដោយ។ តម្លៃខ្ពស់នៃការធានាគុណភាព គួរតែមានតម្លៃសមស្រប និងមានការយល់ដឹងគ្រប់គ្រាន់" / "There is enough information to trust and it's easy to understand. If only there is a video as a proof, I will trust 100%" (Younger, Phnom Penh)

- **Spontaneously, Cambodians appreciate the transparency** (honesty) of the system to educate the end consumers about the whole process.
- **Level of interest / appeal** – Highly interested to have this kind of information
 - ✓ The livestock process of the cows – how cows were kept and fed.
 - ✓ Transportation and transparency of storing and manufacturing processes to maintain the quality of meat all throughout the time.
 - ✓ Creates trust fully with no health concerns – e.g. unhygienic storage and packaging could cause bacteria and germs to stay on the meat which will make sick/diarrhea.
 - ✗ With such detail information showcasing the premium, the price would be high.
 - ✗ It might be niche market and not widely available.
- **The system is broadly credible**, driven by each photo to display the content such as “apply ear tag” and next to it is a cow with an ear tag. This clarifies the content with the visual aid which fosters trust at the same time
 - However, some suggest that videos would be preferred – they could watch the process in action and also listen to a narrative explanation (easier than reading)
- **Impact: Delivers high purchase intent** - This transparency into the production process gives sufficient information to provide higher levels of trust.

Australia's Red Meat Integrity System – Local Stimulus



ផលិតផលសាច់គោអូស្ត្រាលី មានការកំណត់អត្តសញ្ញាណ និង ការតាមដាន ដោយប្រព័ន្ធសម្គាល់សត្វចិញ្ចឹមថ្នាក់ជាតិ

- ✓ មានស្លាកសំគាល់លើត្រចៀក
- ✓ មានកំណត់ត្រាលំអិត
- ✓ មានឯកសារ (ការប្រកាសអ្នកលក់ថ្នាក់ជាតិ)
 - ✓ ទីតាំងលក់
 - ✓ ការដឹកជញ្ជូន
 - ✓ ការសង្កេត
 - ✓ ការធ្វើសត្វឃាត
 - ✓ ការធ្វើអោយកក
 - ✓ ការភ្ជួស់ឌីង និង កាត់ជាដុំ
 - ✓ ការដេចខ្ទប់



Communication Recommendations – Facebook is the easiest source of awareness.



Consumers seek for detail description on the label and gathers solid proof of information on the internet(via videos).

- **Most important aspects to communicate:** Quality Control standards are most important to communicate to validate the health safety and the good quality of meat. Both traceability and integrity system proves that it's processed as per standard protocols to produce the high-quality meat. High quality directly translates to trust.
 - Australian Flag (label) is recommended to communicate country of origin
 - Khmer description is necessary for consumers when doing advertisements or product knowledge to understand the information clearly.
 - Ministry of Health approval/Health certificate (label) that ensure the food safety and prevent the spread of diseases. This helps to establish concrete trust on the quality. Consumers are aware of this certificate from seller recommendation and word of mouth from their friends / family
- **Information sources –**
 - On pack - Short explanation on the packaging label, QR code (on the label) to link to the website/Facebook page for more information.
 - Seller's recommendation – In-store display and to provide sellers with product knowledge to explain to the end consumers.
 - Social media - Facebook Page and YouTube with video contents and narrations. To start an own Facebook Page to update information about the product and price.
 - Facebook Influencers like Tong Heng or Jimmy Meng to do review vlogs about the product and give product knowledge.
- **Impact on purchase decision making:** Can trust the brand due to its quality control standards. This can become the unique attraction point for consumers to choose amongst variety of imported red meats as they have not seen such standards being followed by the other brands in the market.

"គួរតែដាក់ទិន្នន័យកូដកូដ និង យូធូ ក្នុង ដើម្បីពន្យល់ អំពីគុណភាព ការប្រើប្រាស់កម្រិត គុណភាពប្រសិនបើមាន យូធូក្នុង ដែលទាក់ទងនឹងការយល់ យល់ អំពីប្រព័ន្ធប្រព័ន្ធ" / "Should include Australian flag and QR code that explains about the product information. It helps with the authenticity too, I can trust if QR code links to the website or Page" (Older, Phnom Penh)

"គួរតែដាក់អ្នកប្រើក្នុងបណ្តាញសង្គម ដូចជា គុន ហេង ឬ ជីមី មេង មកផ្សព្វផ្សាយ ឬរំលោភអំពីគុណភាព ដើម្បីអោយអ្នកប្រើដឹងបានច្បាស់" / "Use influencer like Tong Heng or Jimmy to advertise/review about the product so many people know about it." (Younger, Phnom Penh)

"មានវីដេអូ ពន្យល់អំពី គោ (គុណភាព អត្តប្រយោជន៍ និងការចិញ្ចឹមសាម៉ា ទៅលើប្រទេសប្រុក និងទឹកកក ក។." / "Make a short video to explain about the beef(quality, benefits and how cows were raised on Facebook and Tik Tok." (Older, Phnom Penh)



SUMMARY & WAY FORWARD

Cambodian consumers – Quality and Origin drive consumer preference for imported meat across meal occasions



Consumers' red meat preferences are driven by quality, country of origin, and health safety, with choices influenced by meal types, pricing, and value perceptions for in-home and out-of-home consumption

1

Red meat purchase decision making

- **In-home consumption:** Decision to choose the type of meat beef/pork/lamb and imported/local is based on the dish that the family asks for. E.g. Lok Lak should be made with beef only
- **Out-of-home consumption:** Usually eat hot pot/BBQ, thus, depending on the price of meat they choose imported/local. Sometimes choose the buffet restaurants to be value for money to eat imported meat.
- **Imported beef price** is slightly more expensive than local beef for in-home consumption but much more expensive in out-of-home consumption.
- **Quality and Country of Origin** are the key factors that provide the taste, softness (easy to chew and less time to cook) and smell of the dish.
- **All consumers mainly eat imported (mostly Australian) and local beef.** The main reasons of choosing imported meat are the quality of meat and reassurance on health & safety.
- Beef consumption is significantly higher than lamb due to preference in taste and smell.

Consumers prioritise quality and country of origin when choosing meat, as these factors impact taste, texture, and cooking ease. While imported meat is preferred for its quality and safety, choices vary between in-home and out-of-home consumption, influenced by dish requirements, pricing, and value for money

Quality beef – Quality anchors and Traceability reinforces the Trust



Freshness, country of origin and Expiration date mainly define quality, and the quality is directly linked to the Trust itself. Traceability enhances the consumer confidence in choice of brand.

2

Understanding trust and quality for consumers

3

Importance of traceability

- **QUALITY:** Attributed by Freshness, Necessary Information, COO, Sensory Attributes and Price
 - Air-tight transparent packaging showing the red colour of meat with expiration/imported date on the label and stored at cool & clean place validates the quality of meat.
 - Country of Origin such as Australia has been in the market for a long-time providing quality meat consistently.
 - After consuming, quality is confirmed by the sweet meat taste, texture (softness to chew and cooking ease) and no meaty smell
 - For some consumers, high price also means good quality (like Wagyu beef from Japan)
- **TRUST:** Quality is directly translated to Trust.
 - Country of Origin which has good reputation from sellers' recommendation and word-of-mouth such as Australia, Japan and USA provides trust.
 - On the label, certificates of QC checks by international standard and health certificate of ministry of Cambodia will significantly improve the trust.
- **TRACEABILITY:** A system that tracks the health of cows and maintains the quality of meat till the point of sale
 - Important to know if the food they consume has followed QC standards to ensure safety and health
 - Cow's physique and feeding regime is important to get nutritious meat and packaging/storage/transportation is important that the quality and health safety is well maintained.
 - Unique selling point for the consumers as most have heard from recommendation/Word of mouth only, not from the brand.

Perceptions of Australian red meat – Trustworthy, High-quality and Safe



Australian red meat is highly trusted by Cambodian consumers due to its consistent quality, safety perceptions, and adherence to international standards. The system's transparency and rigorous processes further enhance its reliability and appeal

4

Perceptions towards
Australian red meat

- **Key perceptions: Trustworthiness and Good Quality**
 - Australian meat is highly trusted by Khmer consumers due to Australia's long-standing reputation for consistent quality and reasonable pricing. Positive word-of-mouth from sellers and relatives abroad reinforces its reliability.
 - Australian meat is known for its rich flavour, tenderness, and hygiene, with attributes such as a sweet flavour and easy chewability, which makes it appealing to consumers, especially children.
 - Australia's strong adherence to international livestock standards and quality control, and favourable climatic conditions contribute to high-quality, safe meat that consumers can rely on. The meat's appeal is enhanced by the lack of unpleasant smells during cooking
- **Reaction to Integrity - Resolved the concern of food safety (chemicals) and storage/transportation however it might be expensive due to its strict process.**
 - **Food Safety:** Strict processes address concerns about chemicals and storage.
 - **Livestock Welfare and Quality Standards:** These practices build trust and address concerns about bacteria and germs, ensuring consumer health.
 - **Transparency:** Traceability from farm to table builds trust. Images and detailed documentation assure consumers of hygienic practices and quality.
- **Suggested Improvement**
 - **Visual Explanations:** Adding videos with narrations can enhance understanding and engagement.

Recommendation: Australia's reputation for quality builds trust in Cambodian markets



Using packaging label, Australian flag, and QR codes enhances legitimacy, while partnerships and digital marketing effectively communicate value

- **Most important to communicate: Country of Origin, Trust and its QC standards.**
 - Australia is a well-established country for Khmers already so leveraging its identity to prominently display the flag on all touchpoints.
 - Packaging label is more important than the brand logo itself. Add the Australian flag for more visibility and a QR code linking to the brand's website or Facebook page as a proof of legitimacy.
 - Traceability and Integrity systems to ensure that Australia not only follows the QC standards but also monitors the health of cows and maintain the quality of meat till the point of sales.
- **Communication and Marketing**
 - Sales representatives to be deployed at Lucky, AEON, Chip Mong and Makro to give product knowledge.
 - Collaborate with Choronai stores (specialised stores) to advertise the product unique selling points (traceability and integrity).
 - Utilise Facebook food bloggers and influencers to create engaging review videos and drive traffic to the brand's Facebook page by adding a link in their video description.
 - Create a Facebook Page to showcase the traceability and integrity processes transparently with the visual aids and Khmer narrations.
 - Leverage that page to update the product, price and availability at certain stores like Lucky, Choronai stores.

Thank You

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