

**The role of
traceability in South-
East Asian consumers'
red meat
decision-making**

April 2025

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Key Take-Aways

1. **Quality** is South-East Asian consumers' top consideration factor when purchasing imported red meat, which is closely connected to Freshness and Country of Origin.
2. Consumers look for red meat they can **Trust** to feel confident in their decision-making, which is built on consistently high Quality and Safety perceptions. **Country of Origin** is a highly important indicator of both Quality and Safety.
3. **Australia is ranked #1** for offering Trusted red meat that is consistently high quality, safe and delicious.
4. **Australia's Traceability system** can be leveraged as a strong support for Trust in, and authenticity of, Australian brands and products, as well as supporting a price premium.

Research introduction

MLA secured a grant from Department of Agriculture, Fisheries and Forestry (DAFF), Australian Government, **Building trust in Australian Agricultural Traceability and Credentials in Southeast Asia**, to promote and showcase Australian red meat traceability and credentials in South-East Asia. This is intended to further enable market access and premium pricing for Australia's red meat exports, as well as to further build trust in Brand Australia. The outcome is also intended to build regional capability through information sharing and engagement to enhance the take-up of transparent supply chain traceability.

The project comprises 3 pillars to drive demand for Australian red meat with Australia's traceability systems at the core:

Pillar 1: Conduct market research in South-East Asia to understand consumer insights and trends regarding Australian red meat.

Pillar 2: Use insights and technical resources to educate businesses through Aussie Meat Academies, fostering trade and investment.

Pillar 3: Enhance transparency and share information about Australia's systems via online resources and digital platforms.

Under Pillar 1, MLA conducted consumer research with the overall objective of identifying drivers of consideration and trust in Australian red meat in the context of traceability, provenance, food safety and sustainability credentials. This document contains a summary of the findings for the highlighted country.

Research coverage: Seven countries covered - Singapore, Malaysia, Philippines, Indonesia, Vietnam, Thailand and Cambodia

Research methodology: four qualitative online focus groups per country (28 in total)

Research timing: the consumer focus groups were conducted in November 2024

Respondent profile:

- Main grocery buyers, regular consumers/purchasers of imported (including Australian) beef and lamb
- All to have purchased imported red meat (beef and/or lamb) at least once a month mainly from modern retail but can also purchase from other retail channels
- Income group / social class: A/A+ or B+ in each country
- Age range: two focus groups were conducted with each age group per country - Younger 18-30 year olds and Older 31-49 year olds
- Ethnicity: a mix of ethnicities as per natural fall-out across countries

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Quality is consumers' top consideration factor when buying imported beef to eat at home, then Freshness and Country of Origin. Consumers lean on several information sources for reassurance and verification.









Ranking of factors South-East Asian consumers consider when purchasing beef to consume at home



- 1. Quality** – Essential for health, nutrition, enjoyment, ease of cooking and versatility
- 2. Freshness** – Key visual cues for health & safety (particularly prominent in Singapore, Malaysia and Thailand)
- 3. Country of Origin** – Closely linked to quality and safety
- 4. Intended usage** – Varies according to recipe and cooking method
- 5. Price** – Top-of-mind for more price-conscious consumers in Cambodia, Philippines, Malaysia and Thailand

Consumer Information Sources	Benefits
Packaging and Label	Immediate and factual
In-store Staff	Expertise, personalised advice, tips and feedback
Family and Friends	Trusted and credible based on locally-relevant cooking experiences
Point-of-Sale Materials and Displays	Complementary to packaging and labels
Social Media	Online communities offer current info and local views

Country-of-origin is closely linked in consumers' minds with beef Quality and Safety, and Australia ranks #1

Rank	Beef Country of Origin	Spontaneous Associations	
		↑ Positives	↓ Negatives
#1	 Australia	<ul style="list-style-type: none"> ✓ Consistently high quality ✓ Hygienic ✓ Trustworthy ✓ Widely available ✓ Established halal system 	<ul style="list-style-type: none"> ✗ Less marbled than Japanese ✗ Higher price than local
#2	 Japan	<ul style="list-style-type: none"> ✓ Exceptional quality for niche occasions ✓ High marbling and tenderness ✓ Meticulous farming practices 	<ul style="list-style-type: none"> ✗ Very expensive ✗ High fat content limits regular consumption
#3	 US	<ul style="list-style-type: none"> ✓ Reliable quality ✓ Widely available ✓ Popular for BBQ and hotpot 	<ul style="list-style-type: none"> ✗ Less fresh due to distance ✗ Industrial, unnatural production system
#4	 NZ	<ul style="list-style-type: none"> ✓ Natural farming practices ✓ Halal compliance 	<ul style="list-style-type: none"> ✗ Higher price than Australian meat ✗ Less familiar
#5	 Brazil	<ul style="list-style-type: none"> ✓ Low cost 	<ul style="list-style-type: none"> ✗ Lower quality due to price ✗ Limited awareness and availability
#6	 Local	<ul style="list-style-type: none"> ✓ Low cost ✓ Easily accessible ✓ Suitable for local dishes 	<ul style="list-style-type: none"> ✗ Inconsistent quality ✗ Poor hygiene

Confidence in consumers' red meat decision-making depends on Trust in the product's safety, quality and authenticity

Trust



Consumers constantly verify their level of Trust in red meat products using a combination of indicators:

- **Meat safety and quality** – visual freshness cues, clear product information labelling, including Country of Origin and certifications
- **Retailer reputation** – those that offer reassurance of their products' safety and quality

South-East Asian consumers' perception of Trust underpins their red meat purchase decision-making:

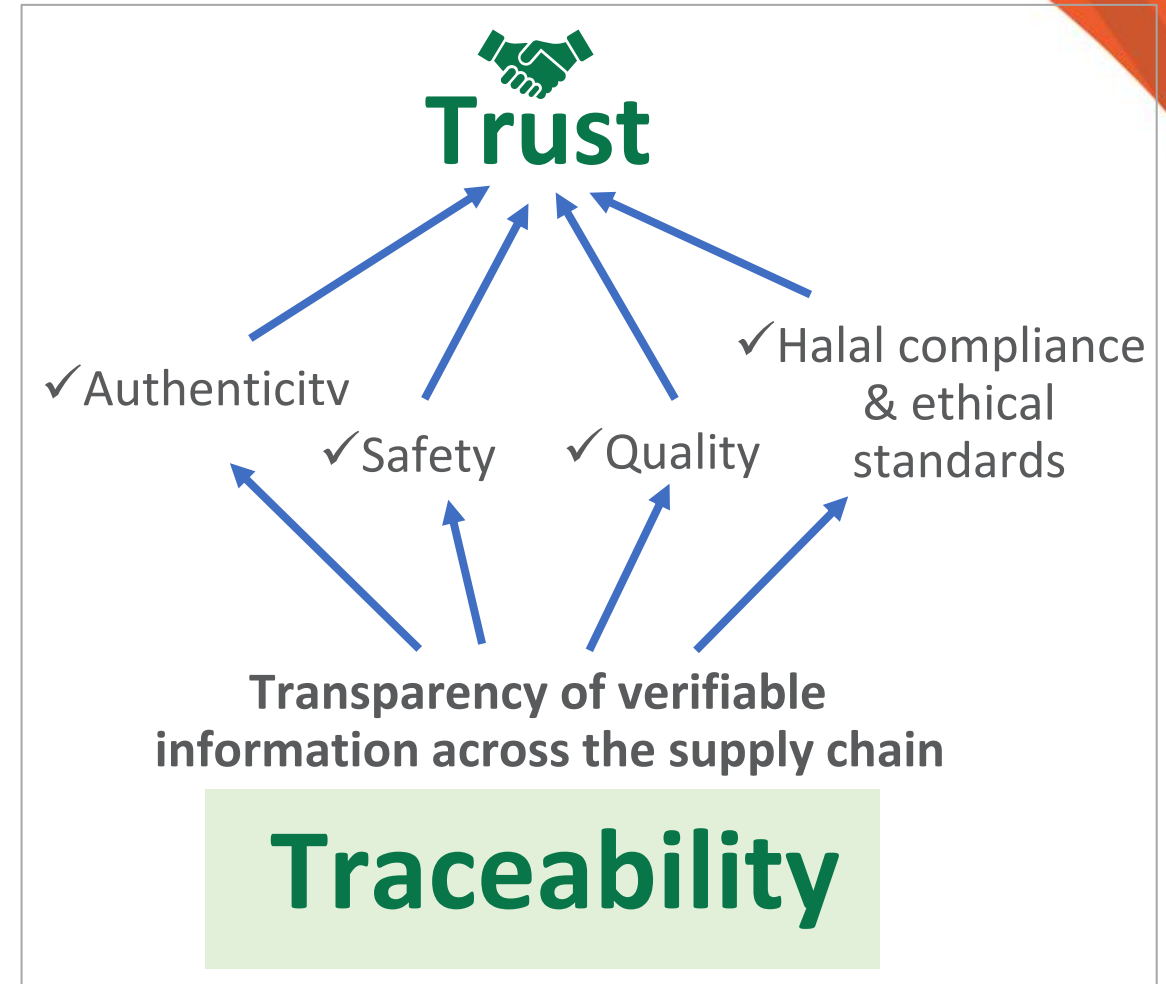
- Reassurance that the meat is safe and high quality for family consumption
- Enhances enjoyment in family meals
- Meets expectations on cooking results
- Simplifies purchase decision-making by reducing doubt



Most consumers say they **will pay a premium** of 10-30% for red meat they trust

Traceability is seen by South-East Asian consumers as a support for Trust in red meat product safety and authenticity

- South-East Asian consumers are not yet familiar with the concept of red meat Traceability
- However, the concept of Australia's Traceability System is considered to offer red meat supply chain transparency which, in turn, supports Trust in red meat product safety and authenticity
- Red meat traceability has even stronger appeal in regional markets where consumers have lower levels of trust in product safety and authenticity – such as Indonesia, Cambodia and Vietnam



When beef is consumed out-of-home, the reputation of the restaurant is the most important factor in consumers' perception of the beef quality

However, in premium restaurants, **Country of Origin** is often used as an effective marketing tool



Ranking of factors south-East Asian diners consider when ordering beef

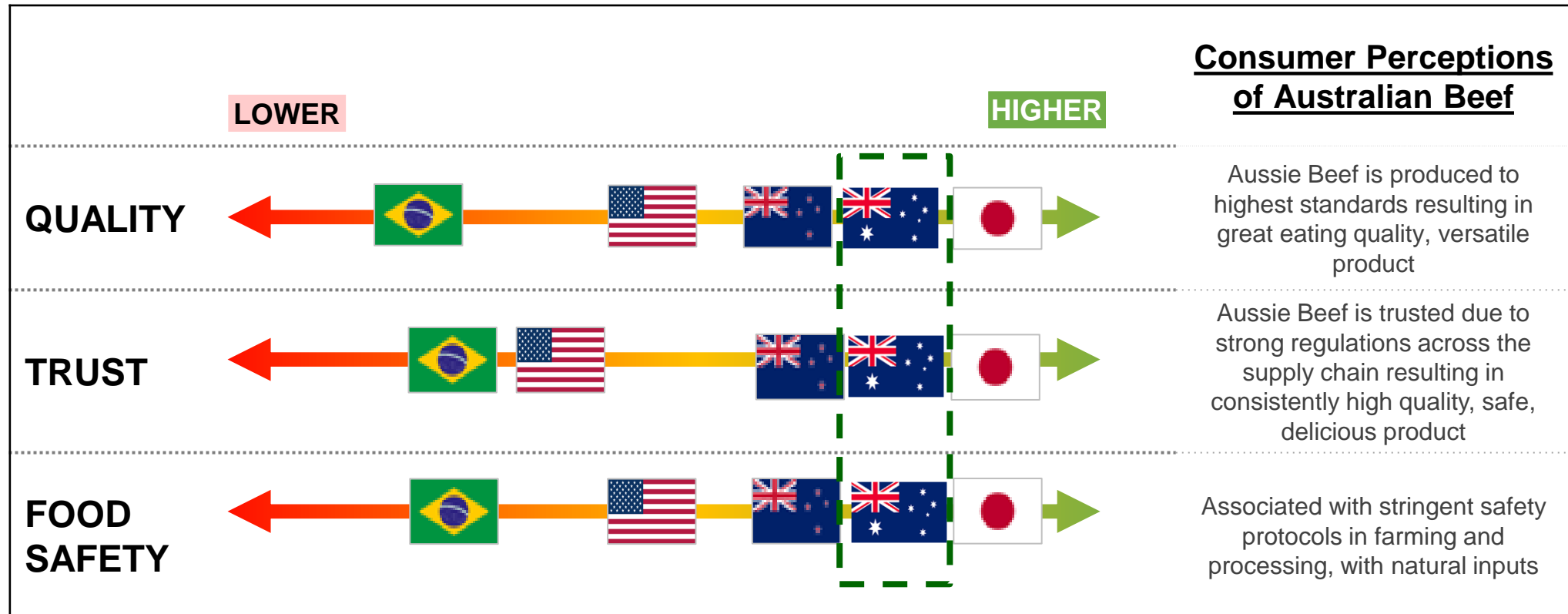
Importance ranking

- 1. Restaurant reputation** – Credibility and trust are built through reviews, word-of-mouth and transparency in sourcing
- 2. Value** – Premium offerings justify higher spending
- 3. Dish variety** – Diversity of dishes and cuisines offered
- 4. Country of Origin** – Consideration for beef-centric dishes
- 5. Reviews** – Influence perception of ingredient quality and dining experience (more important to younger diners)

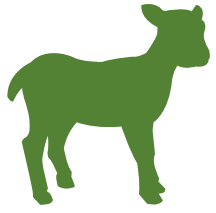


Australian beef is perceived as the best among direct* competitors, underpinned by consumers' trust in quality and safety systems

South-East Asia consumer's imported Beef ranking by factor



*Japanese wagyu is considered an aspirational luxury niche product consumed on very special occasions



Lamb is consumed on special occasions with cut type, quality and Country of Origin as the top purchase factors when deciding between products

Ranking of factors SEA consumers consider when purchasing lamb to consume at home

Importance ranking

- 1. Cut & intended use** – Consideration for limited and specific dishes and cooking styles
- 2. Quality** – Preference for sufficient fat for tenderness and flavour
- 3. Country of Origin** – Imported is preferred for tenderness, reliability and value for larger families
- 4. Ease of cooking** – Minimise the risk of poor eating quality results
- 5. Price** – Balancing quality and affordability, promotions influence purchase decisions due to high price point



Australia is the dominant supplier of lamb, valued for its natural and high-quality farming practices resulting in delicious product



NZ is associated with quality lamb but less familiar than Australian



Lower trust in local lamb - associated with strong, unpleasant odour and inconsistent quality

Key Take-Aways

Consumer red meat purchase decision-making

- ❖ **Quality** is South-East Asian consumers' top consideration factor when purchasing imported red meat, and is closely connected to Freshness and Country of Origin.
- ❖ **Trust** in the consistently high quality and safety of the red meat they purchase is critical for consumer confidence in their decision-making
- ❖ **Country of Origin** is a highly important indicator of both Quality and Safety.
- ❖ **Australia is ranked #1** for offering Trusted red meat that is consistently high quality, safe and delicious

Traceability

- ❖ Traceability is not currently a spontaneous factor South-East Asian consumers consider when purchasing red meat.
- ❖ But is seen as **value-added feature** that brings **transparency** to the red meat supply chain behind products.
- ❖ Traceability hence enhances **Trust** via the assurance of safety and quality, halal compliance, ethical standards and authenticity.
- ❖ As a strong support for red meat product trust and authenticity, Traceability can support consumers' **willingness to pay** a premium.
- ❖ As the most trusted country of origin, **Australia's Traceability system** further differentiates Australian red meat as the most trusted.

Way forward

- ❖ Australia's Traceability system can be leveraged as a strong support for Trust in, and authenticity of, Australian brands and products.
- ❖ This reassurance of Trust and Authenticity can be used to support a premium price point.
- ❖ This can be particularly appealing to less frequent or new buyers of Australian red meat and in markets with higher meat safety and authenticity concerns such as Cambodia, Vietnam and Indonesia.

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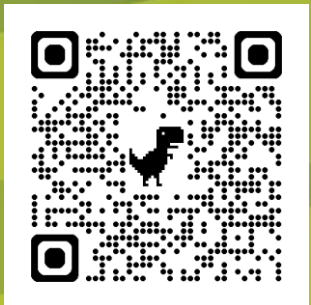
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For more resources:

[South-East Asia Red
Meat Market Snapshots](#)



[Aussie Meat Trade Hub](#)

