



2018 호주 및 세계 시장 동향 & 전망



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2018.March

아젠다

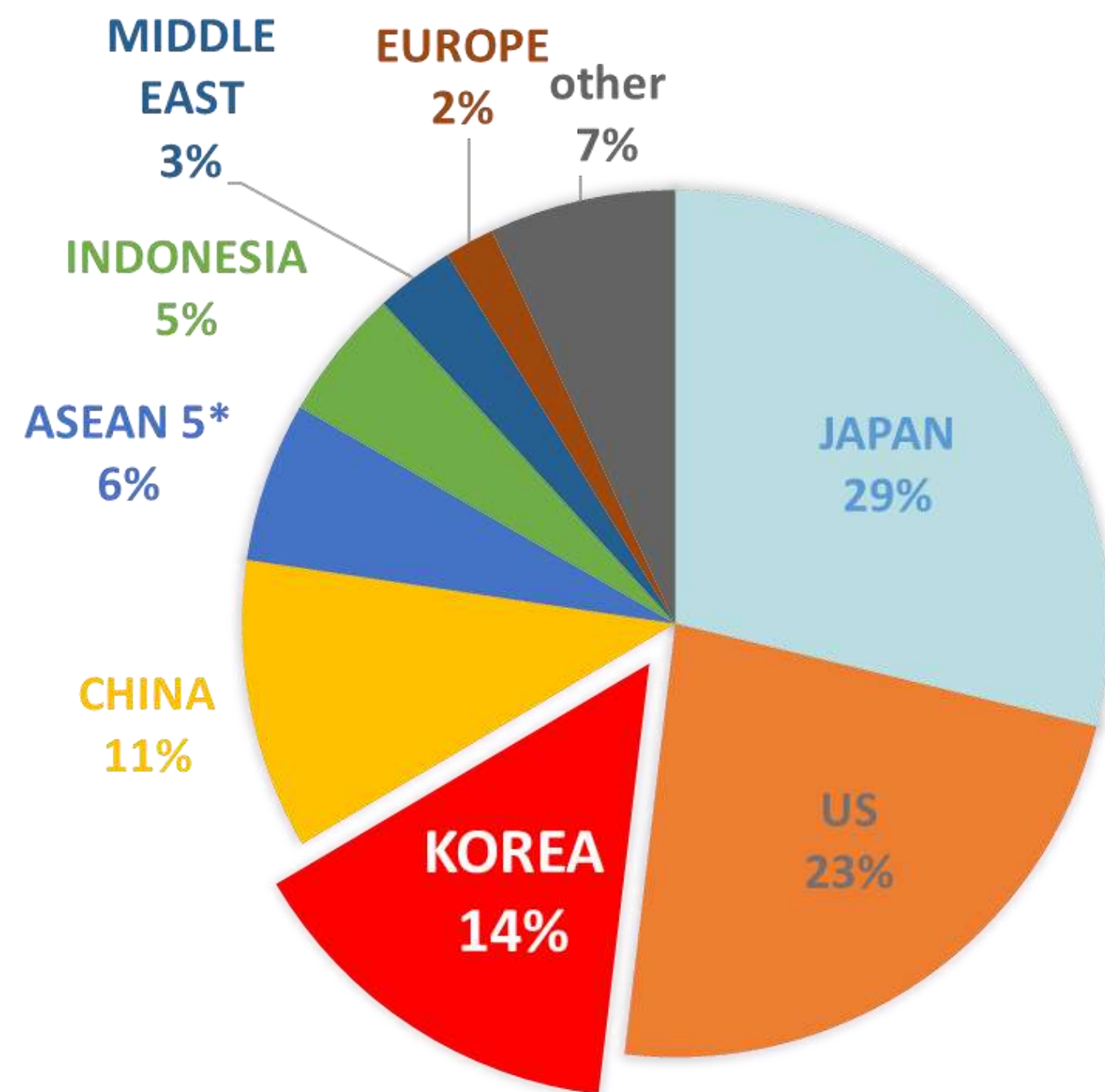
- 2018 호주 및 세계 시장 동향 & 전망
- 마케팅



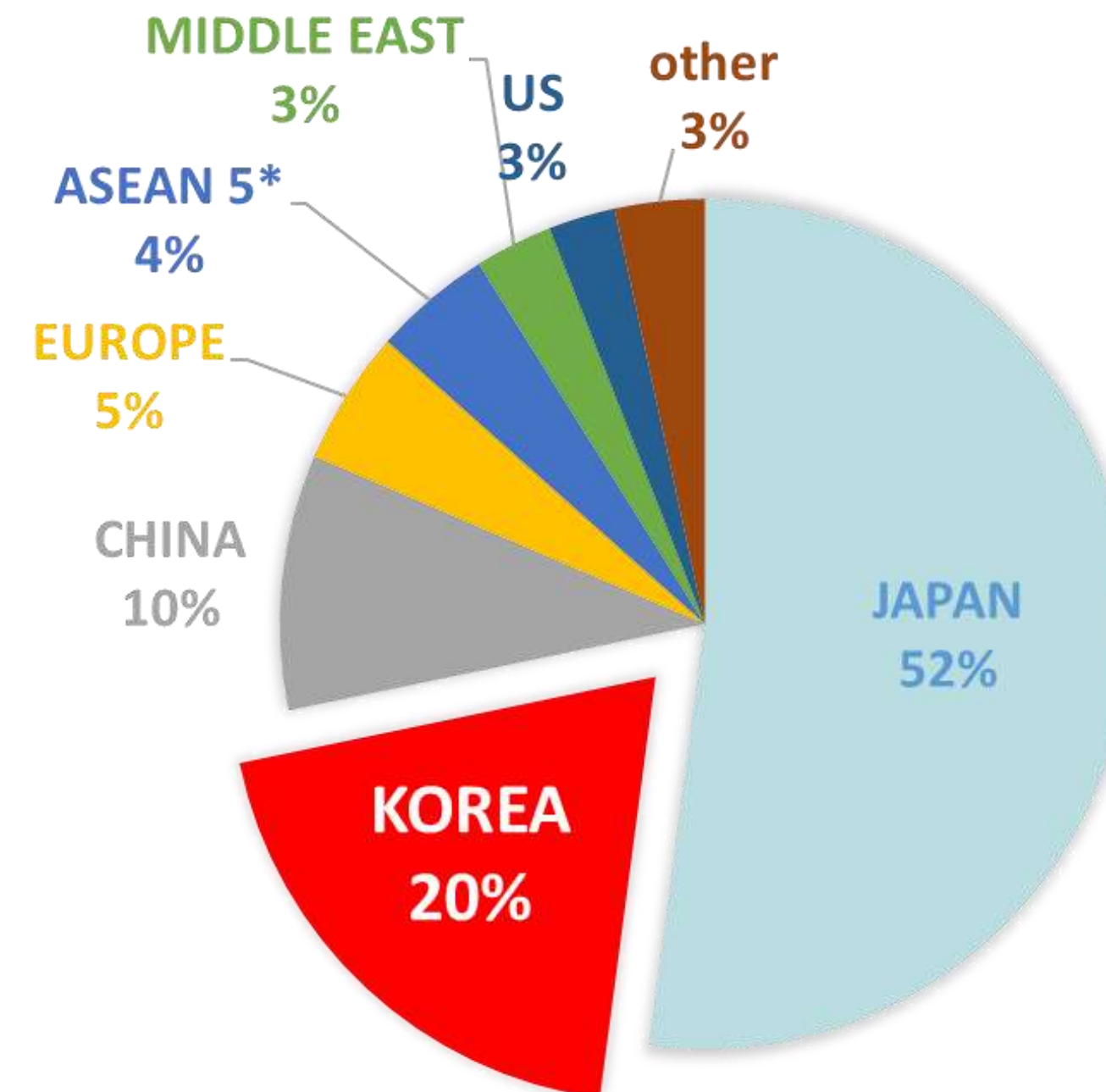
한국

- 한국 내 호주산 쇠고기의 판매량과 매출액이 전체 3위를 차지
- 곡물비육 쇠고기 전세계 2위 수출시장
- 매출액으로 호주산 부산물 수출시장 2위

총 쇠고기 수출 2017
1,014,915 톤 swt



총 곡물비육 쇠고기 수출 2017
272,682 톤 swt

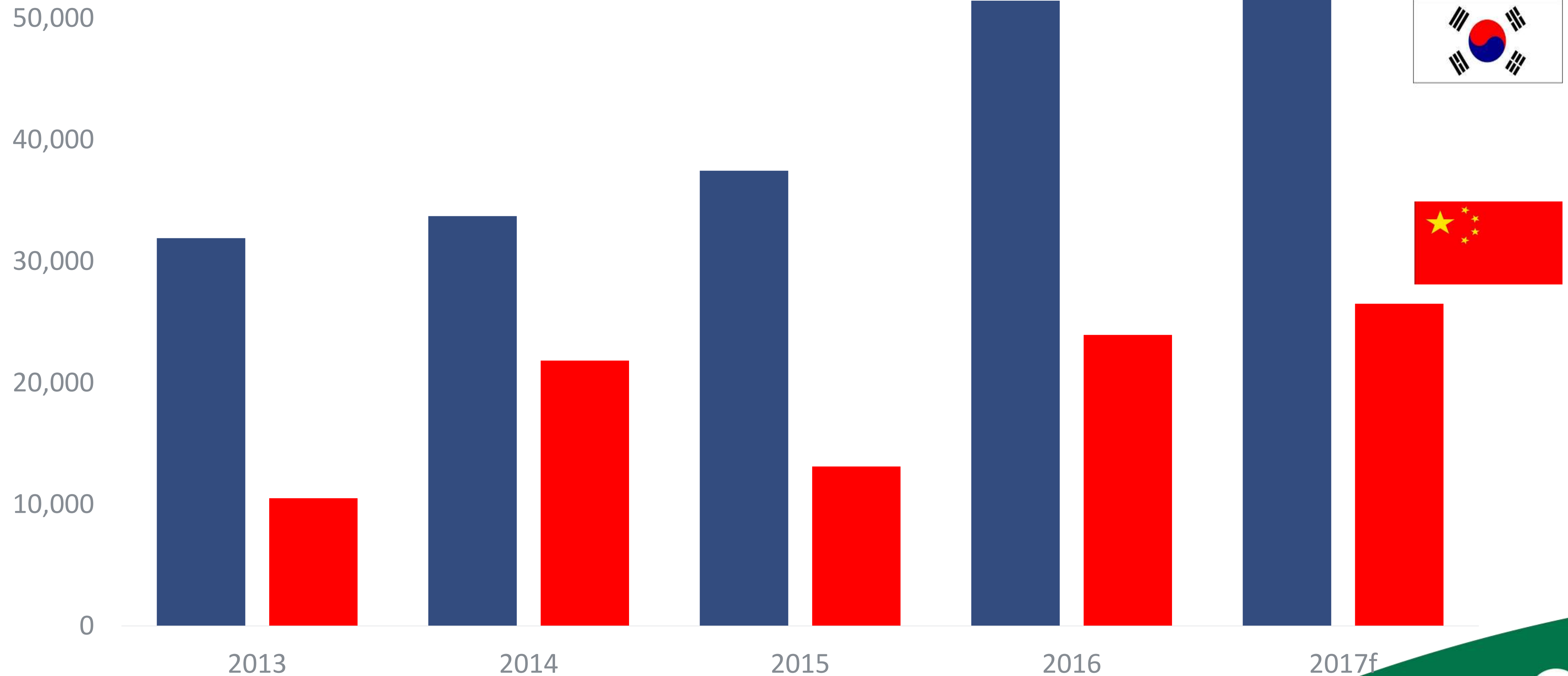


한국으로의 호주산 쇠고기 수출



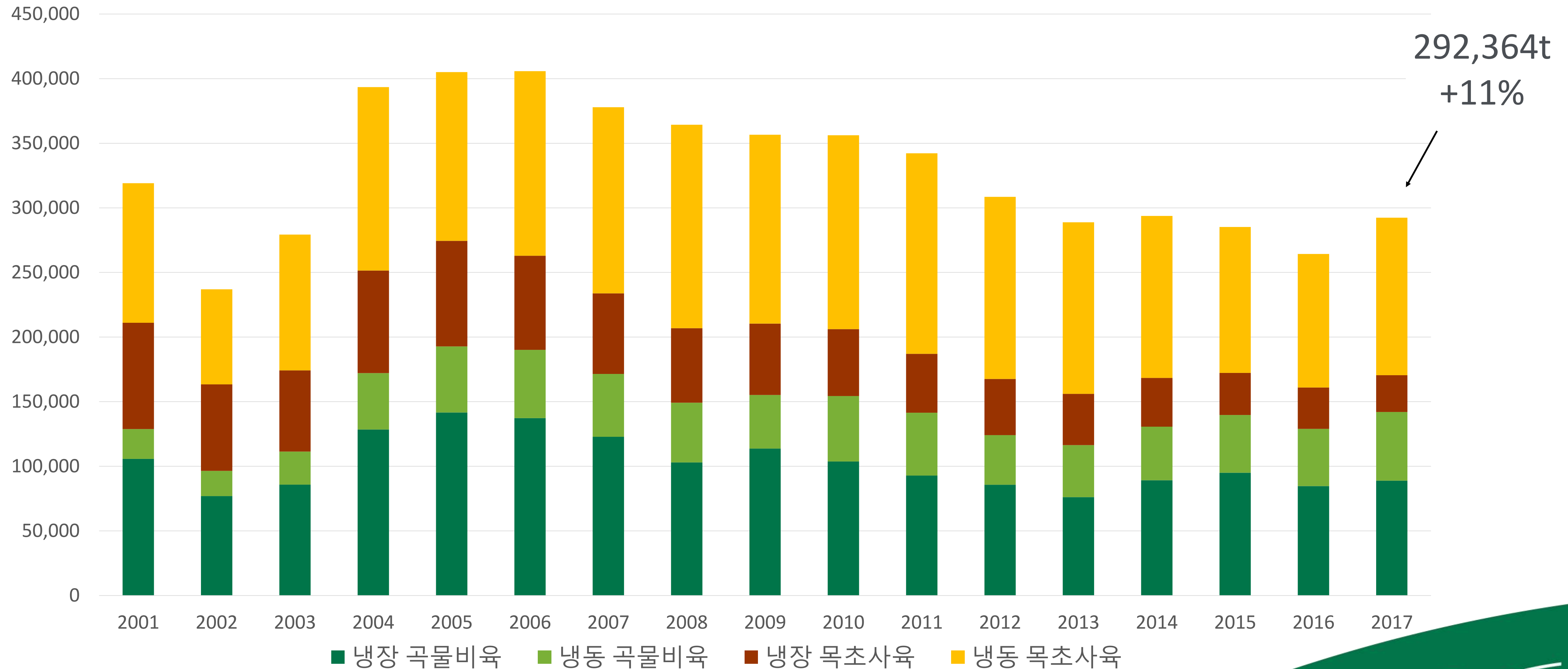
Source: DAWR, in tonnes swt

곡물비육 쇠고기 수출 한국과 중국으로 인한 증가



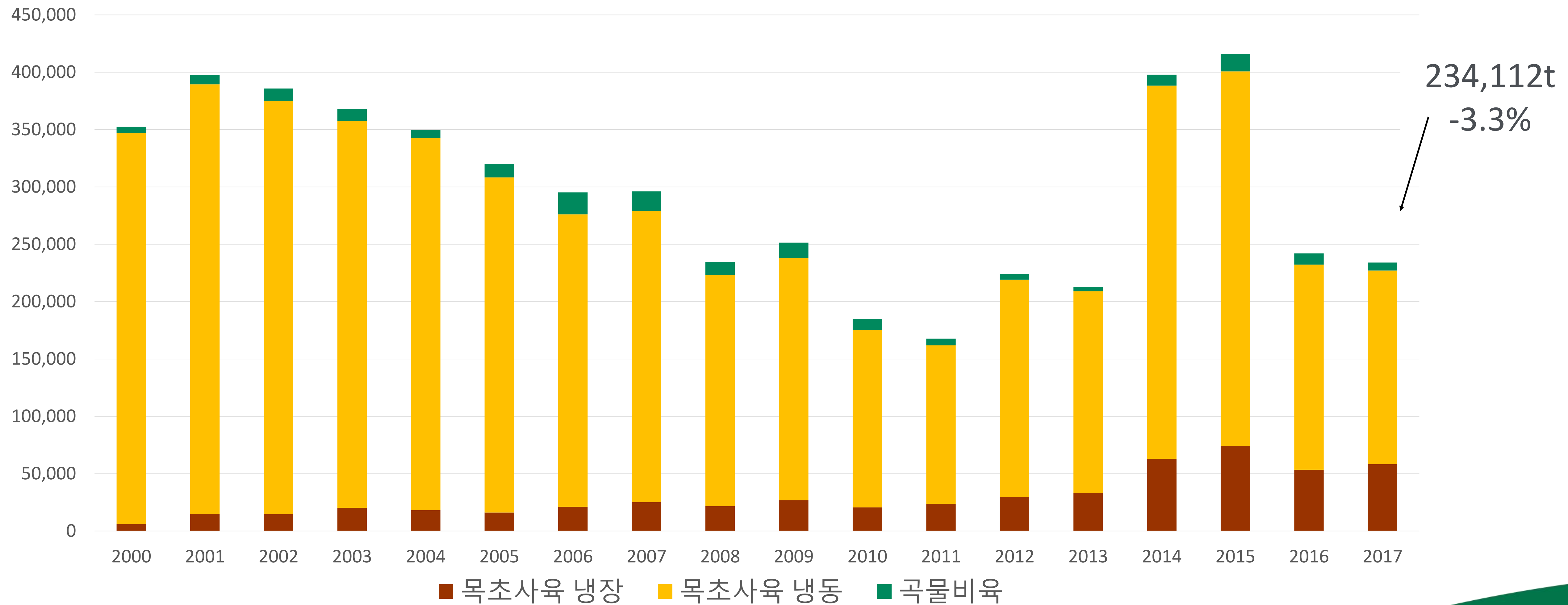
Source: DAWR, in tonnes swt

일본으로 호주산 쇠고기 수출



Source: DAWR, in tonnes swt

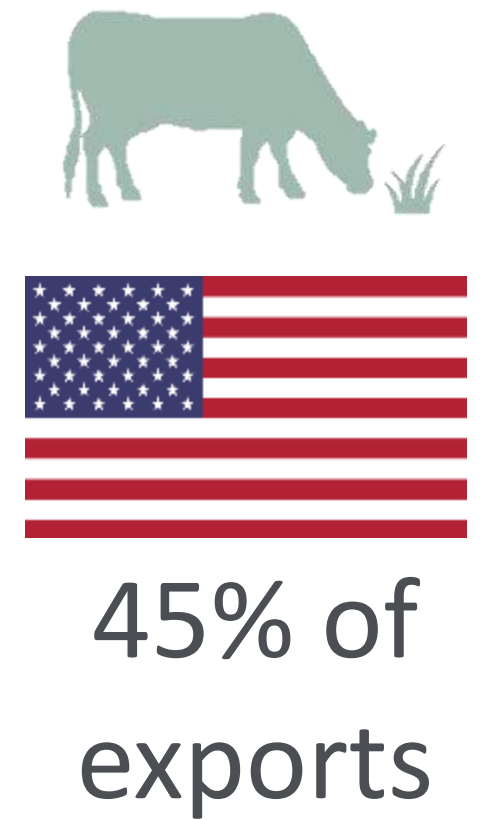
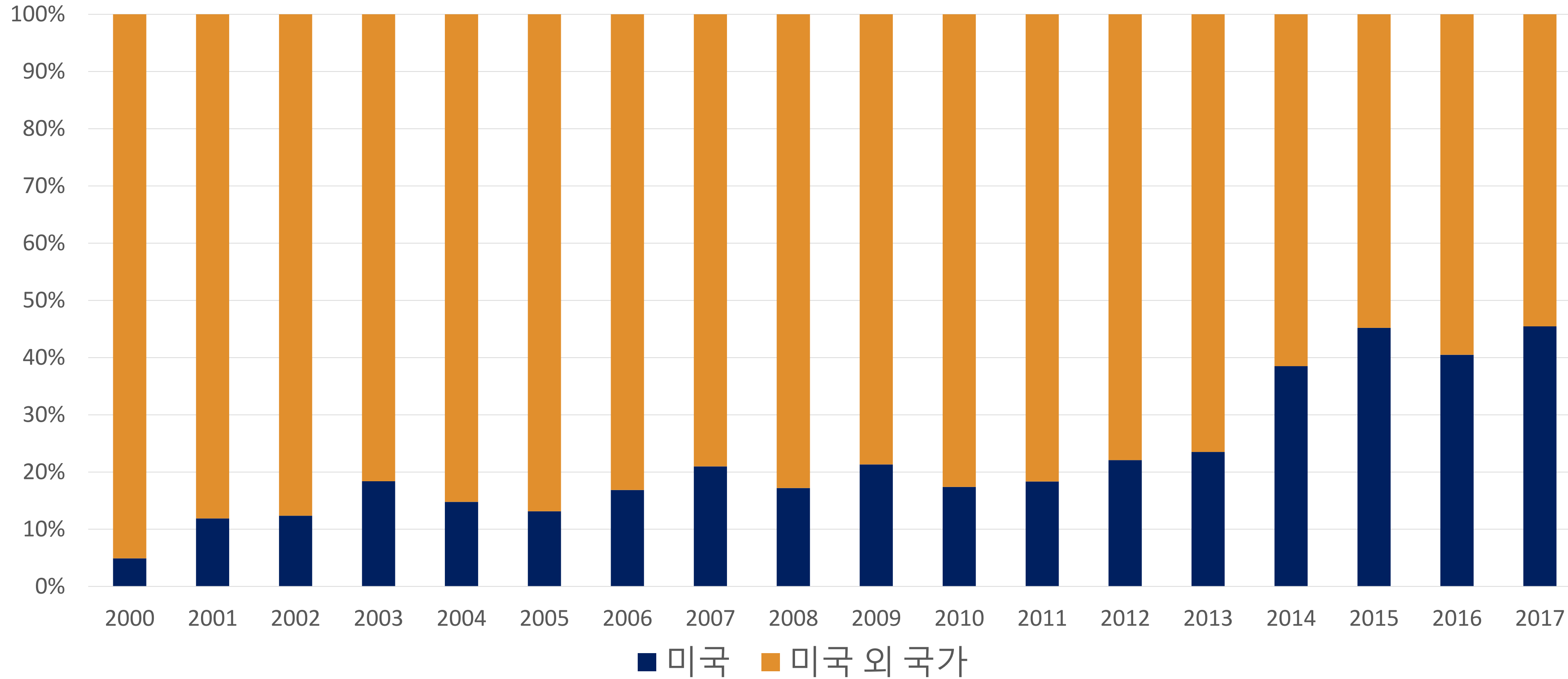
미국으로 호주산 쇠고기 수출



Source: DAWR, in tonnes swt

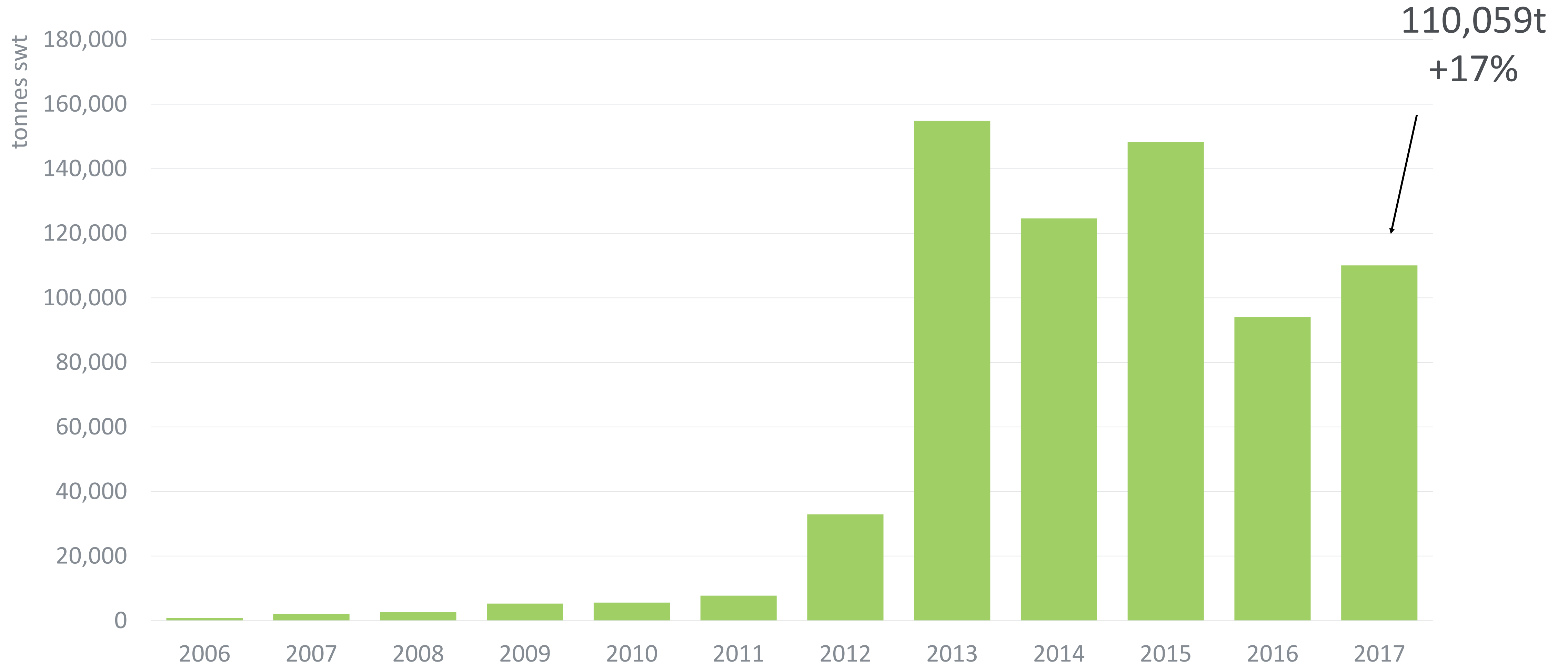
미국으로 냉장 목초사육 쇠고기 수출

Australian chilled grassfed beef exports – US & the rest of the world



Source: DAWR, in tonnes swt

중국으로 호주산 쇠고기 수출

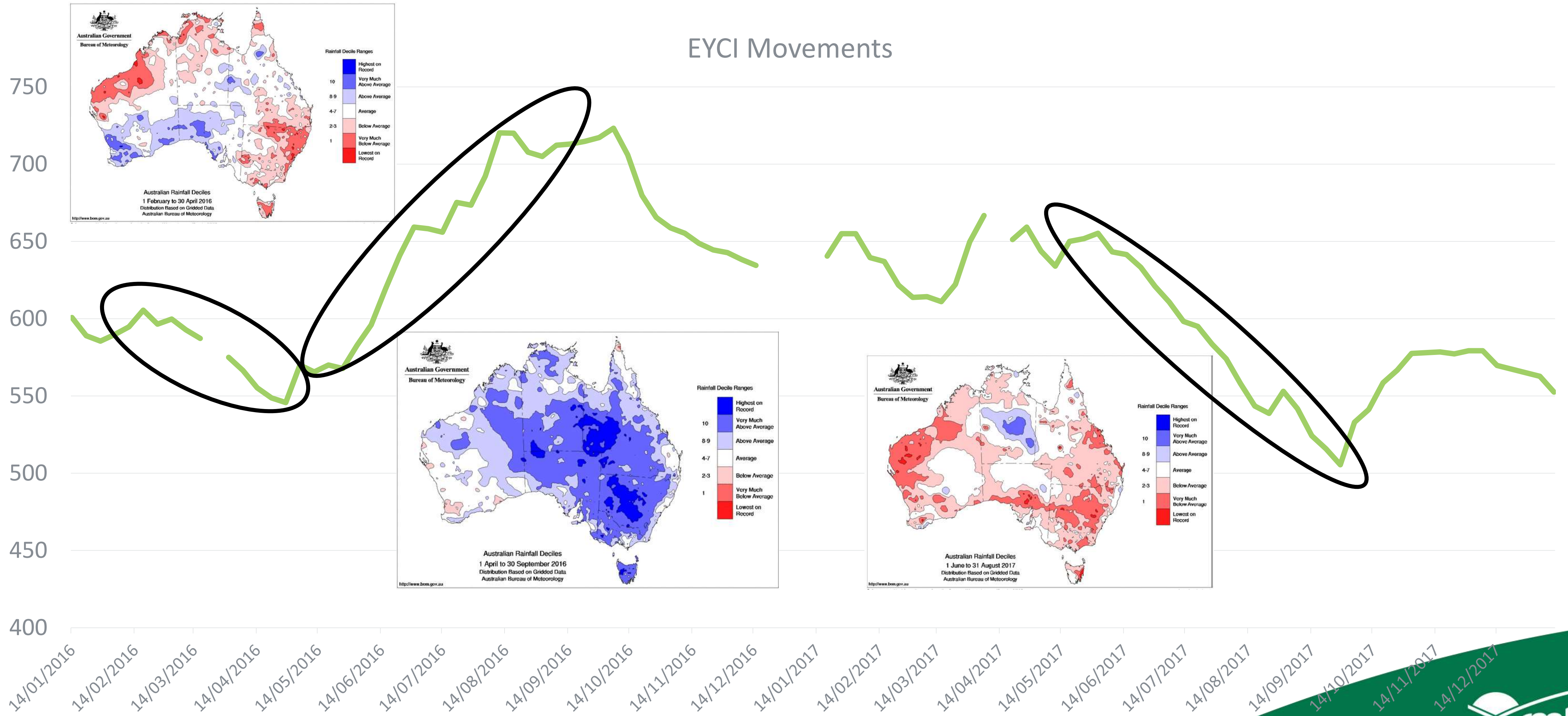


Source: DAWR, in tonnes swt

공급 전망

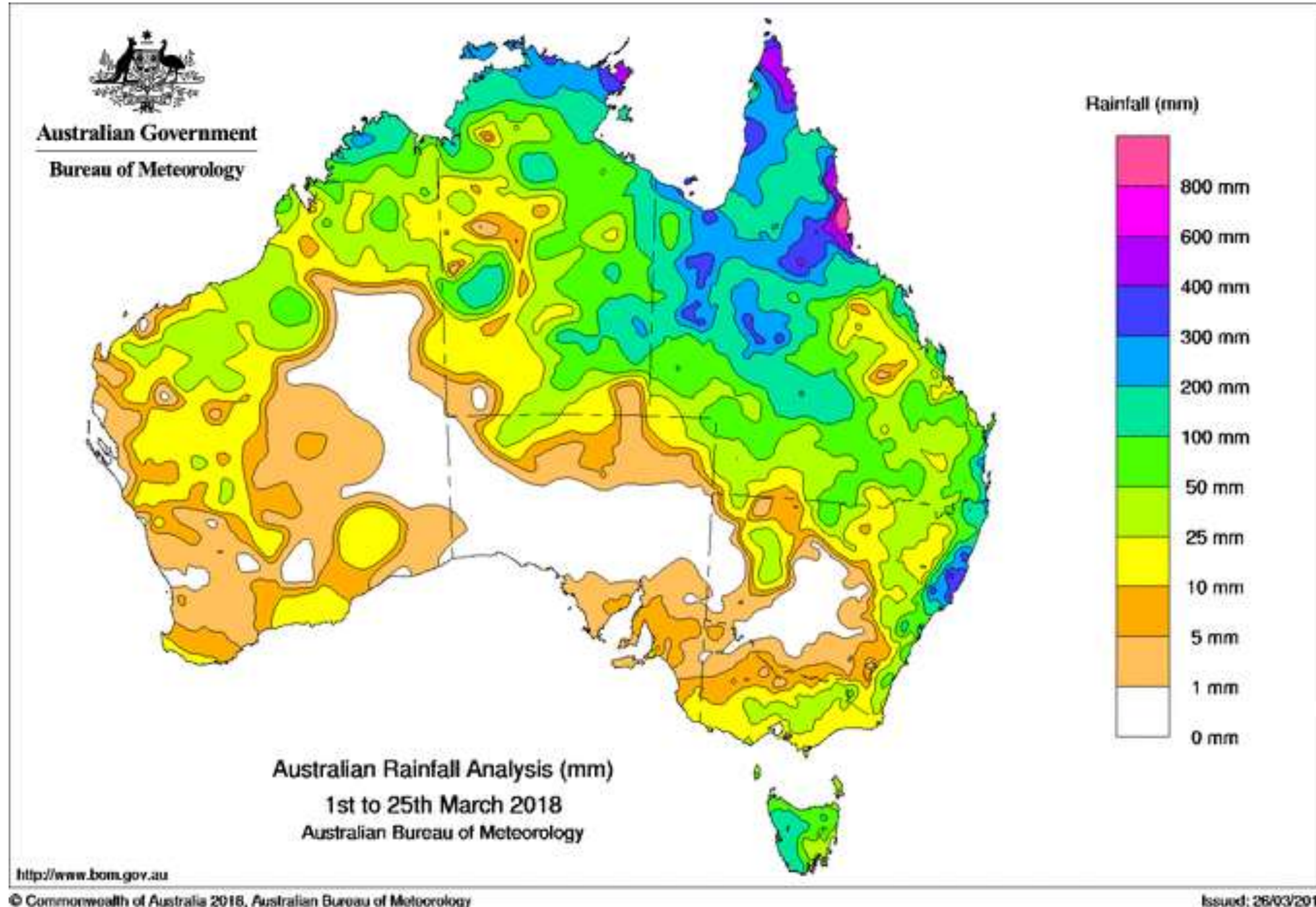
공급 전망: 소 가격 기후변화와 움직임

EYCI Movements

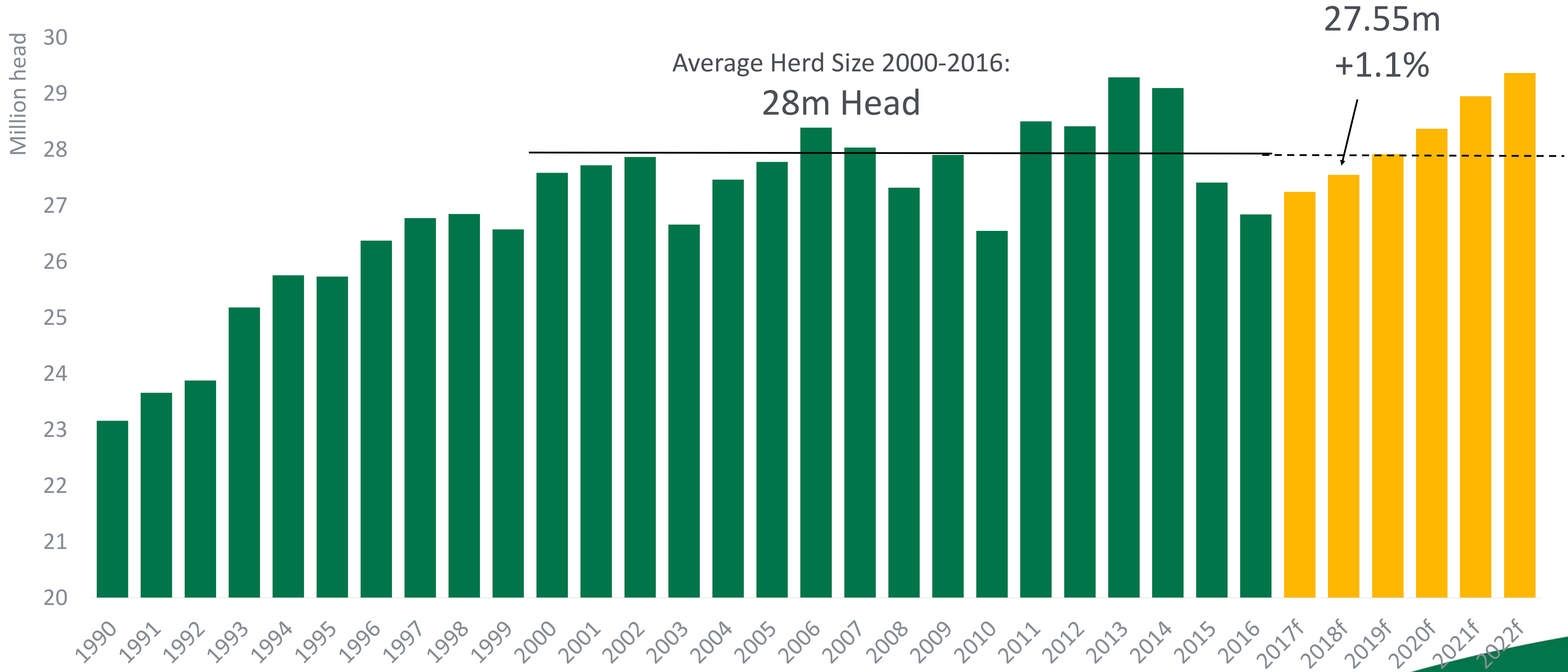


Source: NLRS

중요한 최근 강우량

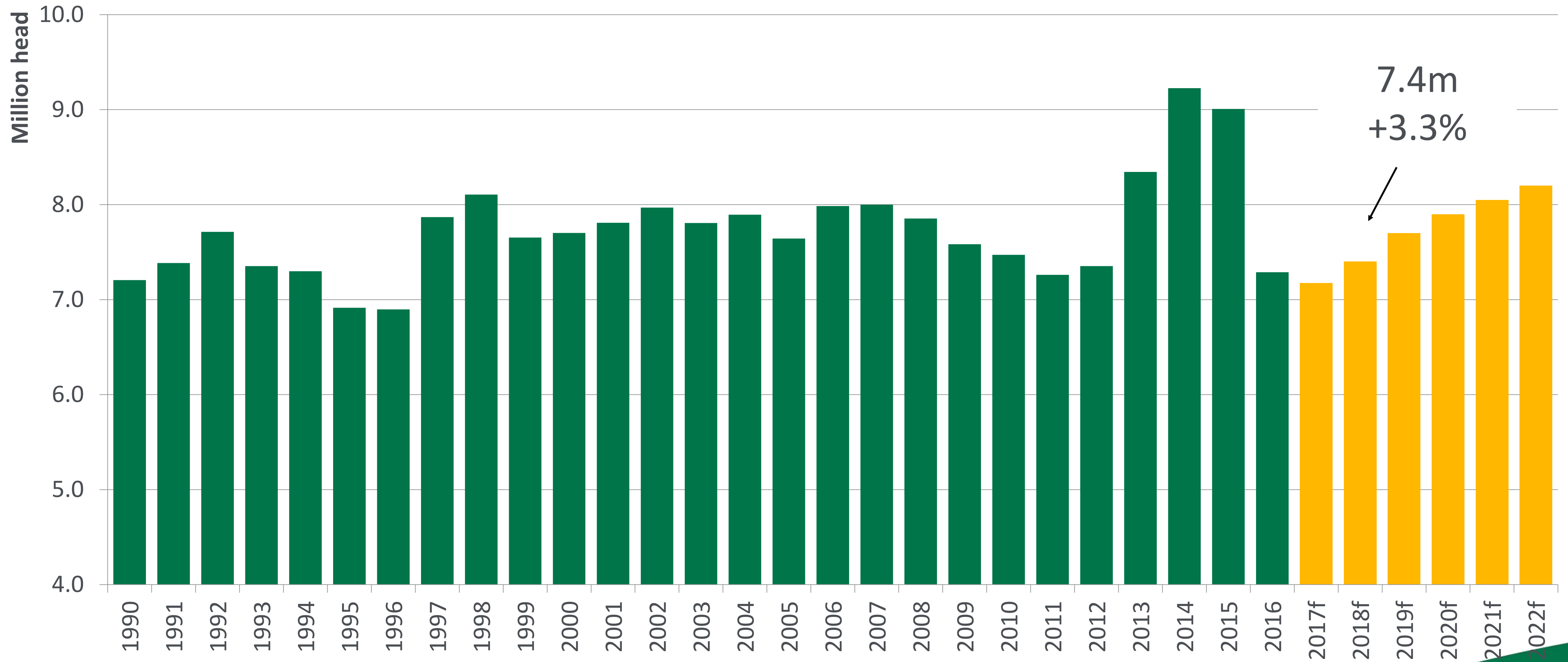


사육두수: 소 사육두수 회복



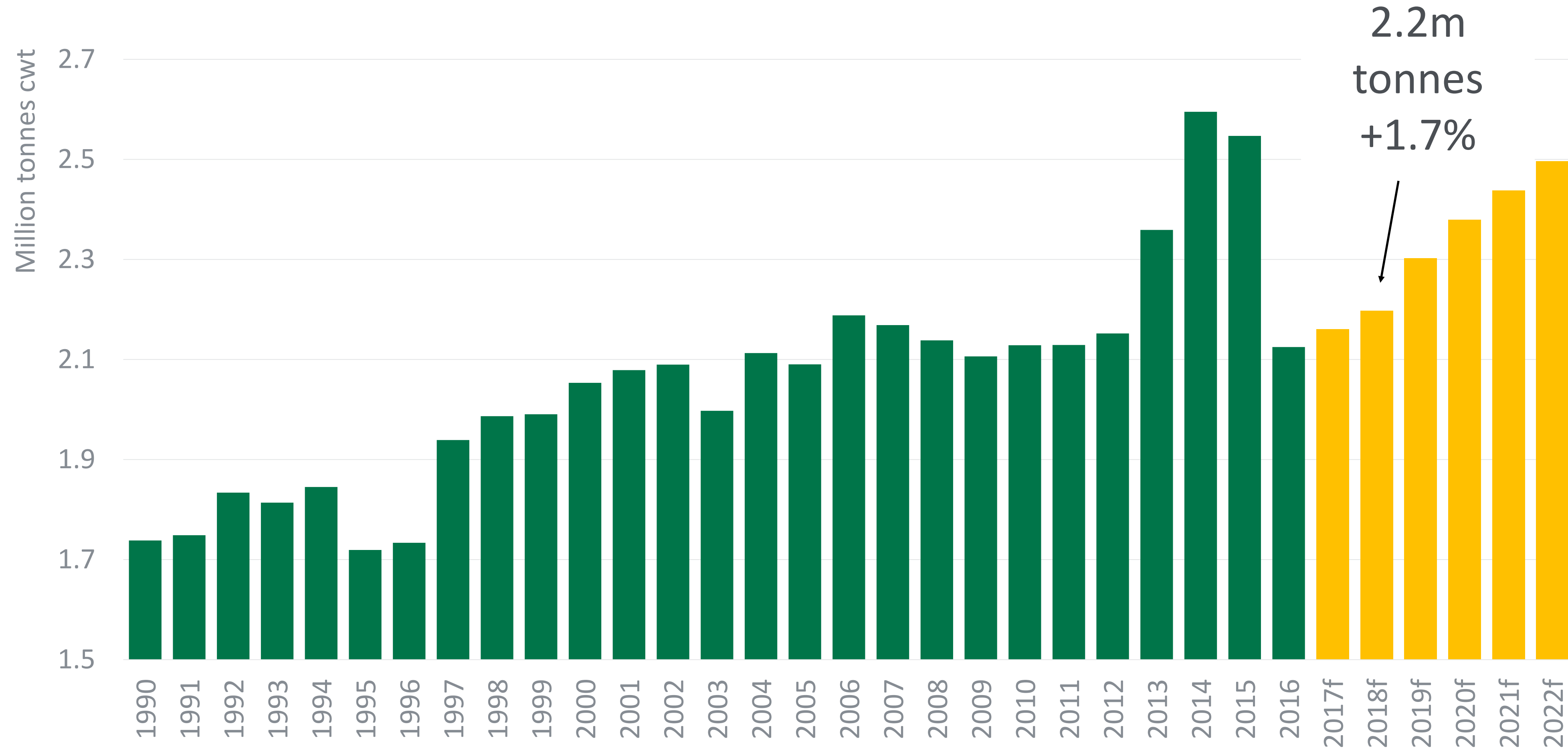
Source: ABS and MLA Estimates

소 도축두수: 2018년 증가 전망

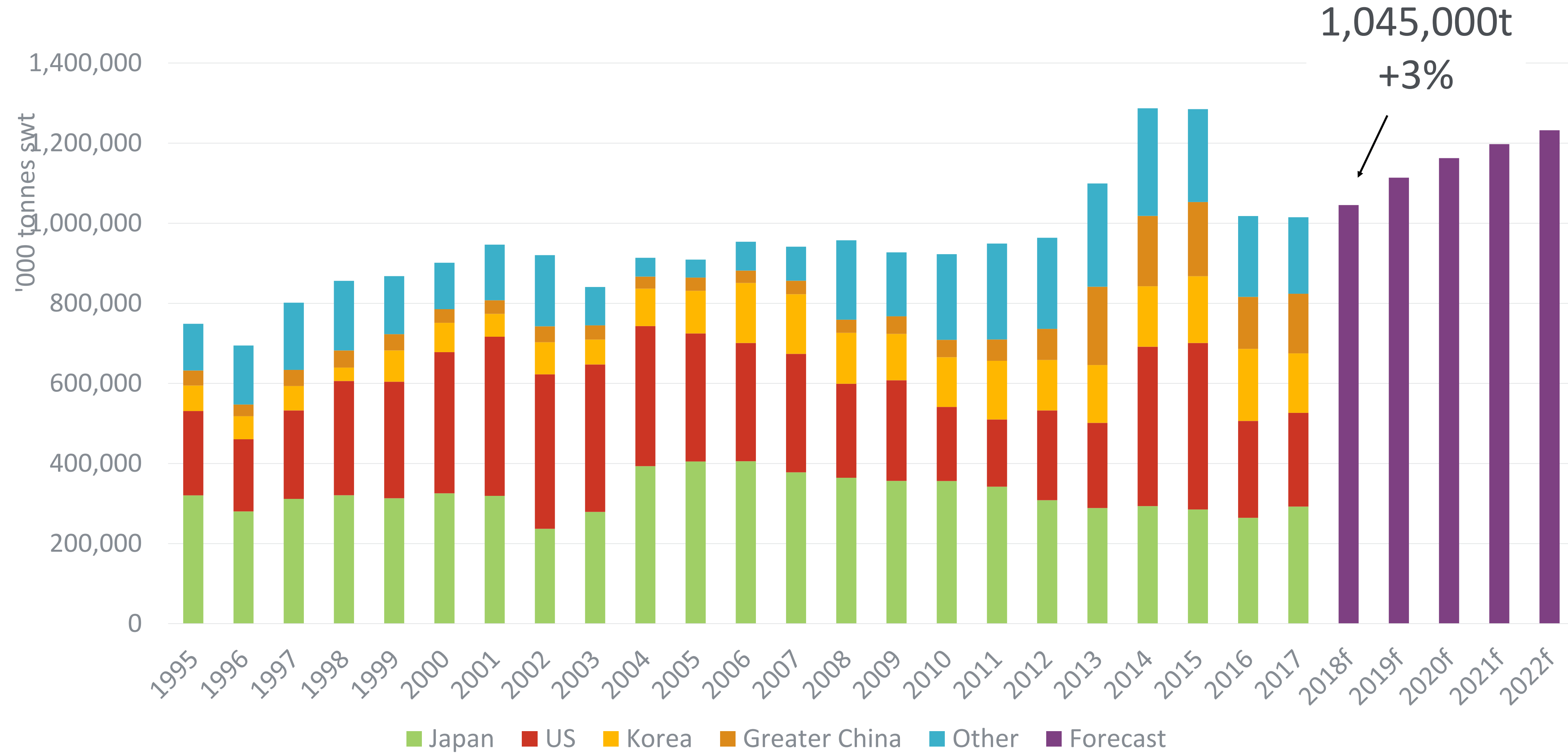


Source: ABS and MLA Estimates

생산 물량: 추후 5년간 매년 3% 증가 전망



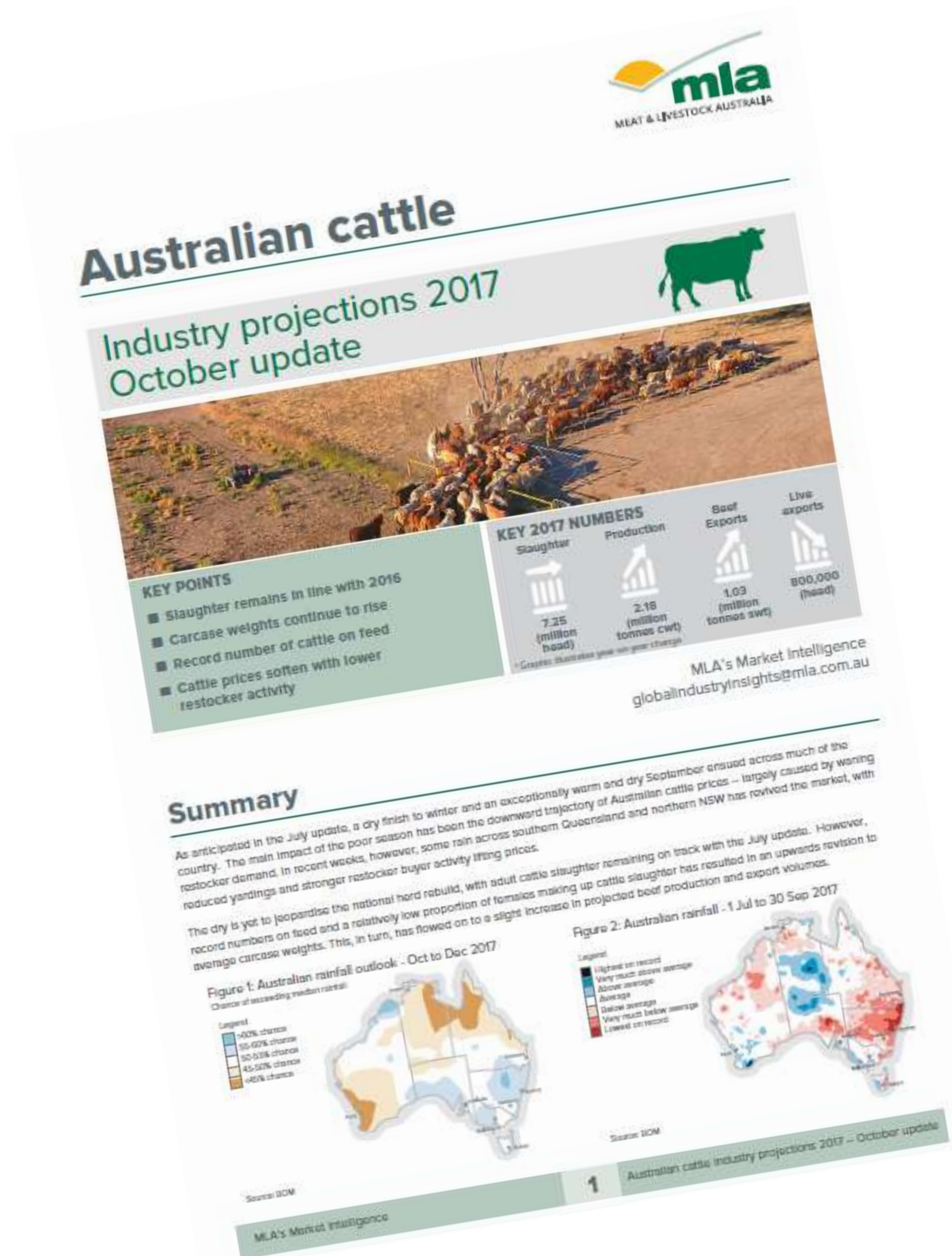
수출: 호주산 쇠고기 및 송아지 고기 수출 물량



요점 – 한국 시장과 공급

- Korean market large and important
- 한국 – 중요한 호주산 수출 시장
- Australian production has turned the corner
- 호주산 쇠고기 생산 증간 전망
- Beef exports expected to increase by 3% this year, and 20% over 5 years
- 호주산 수출 물량 금년 3%, 추후 5년동안 20% 증가 예상

호주축산공사 전망 자료

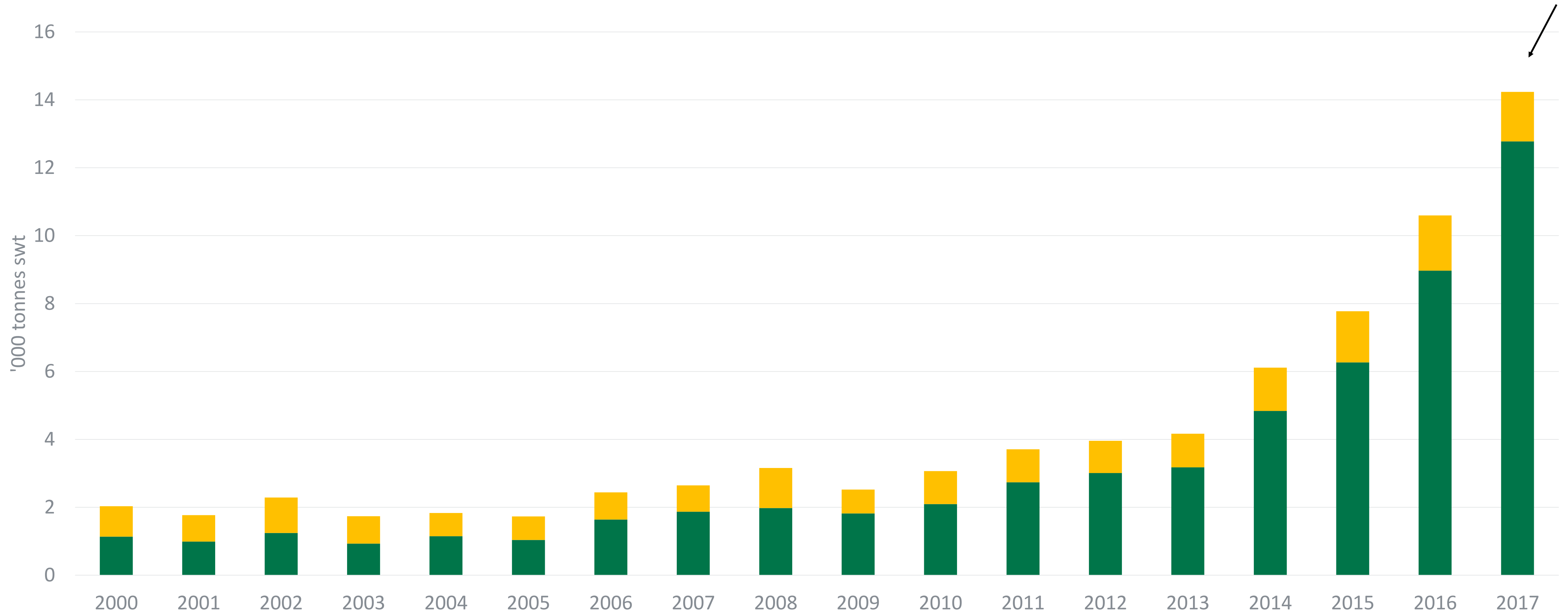


- 연간 4번 발표
- 매년 1월 연간 총 전망 발표
- 4월, 7월, 10월 업데이트

[mла.com.au](http://mla.com.au) 방문

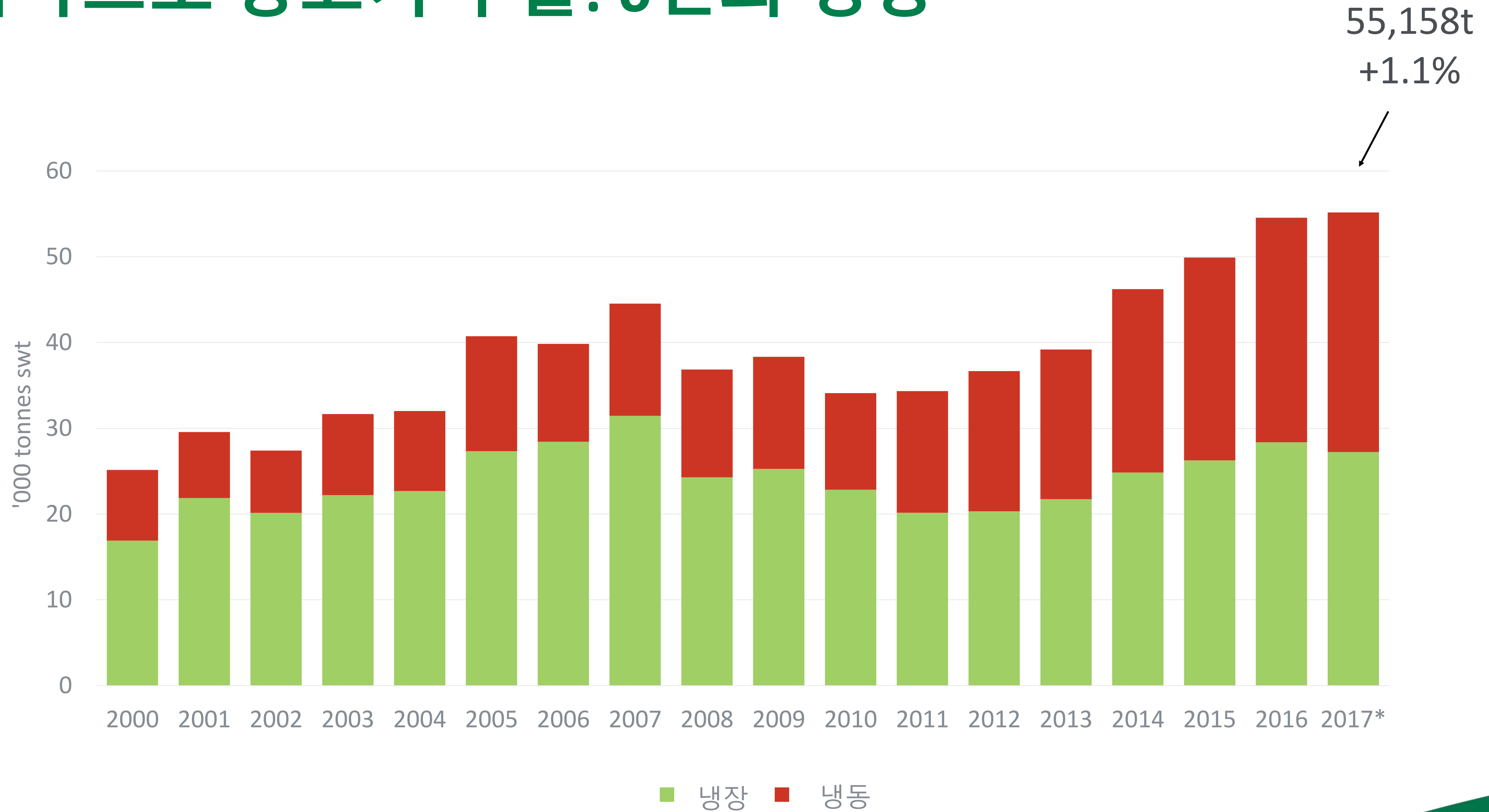
한국으로 호주산 양고기 수출

14,230t
+34%



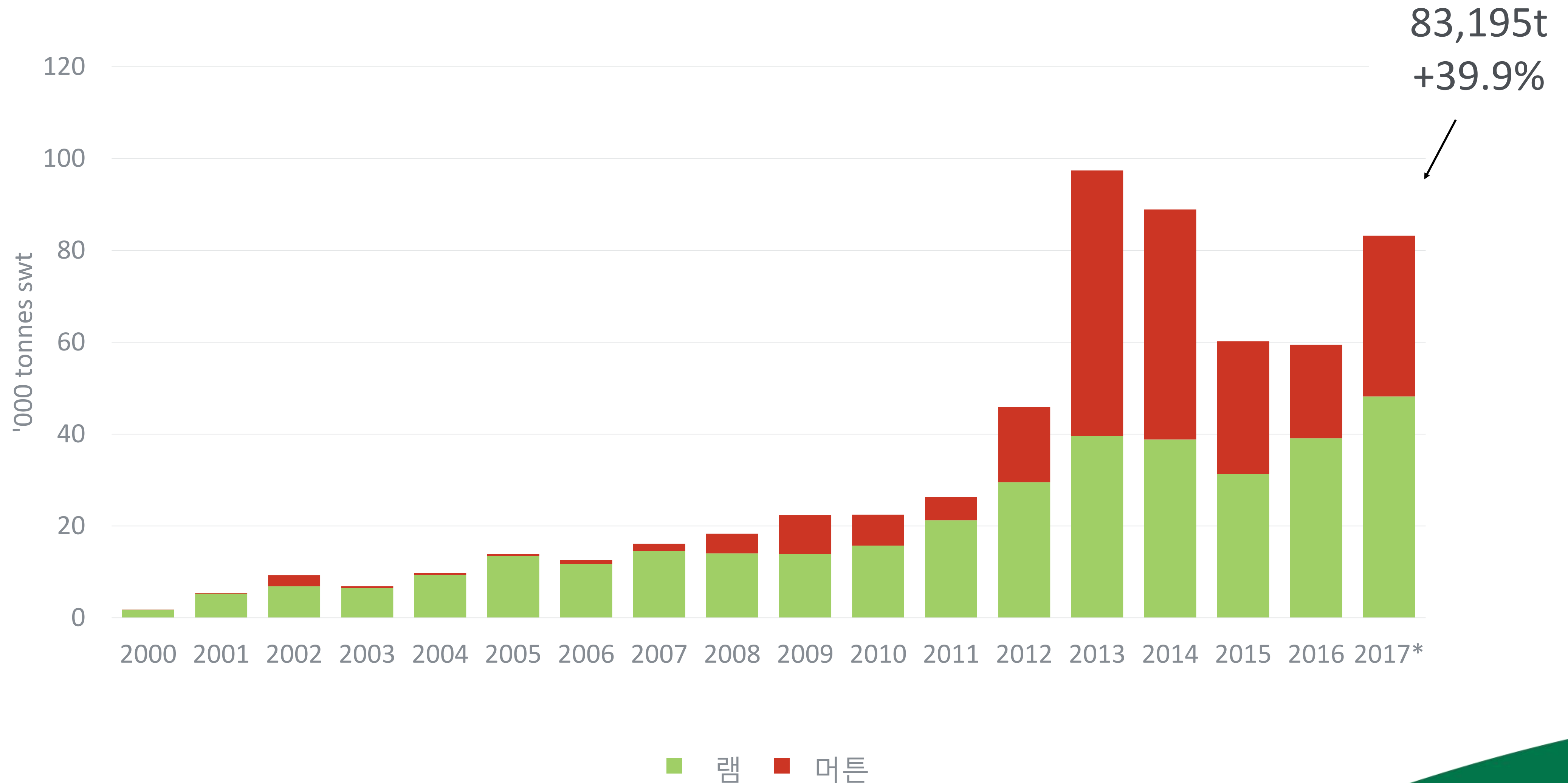
■ 램 ■ 머튼

미국으로 양고기 수출: 6년의 성장



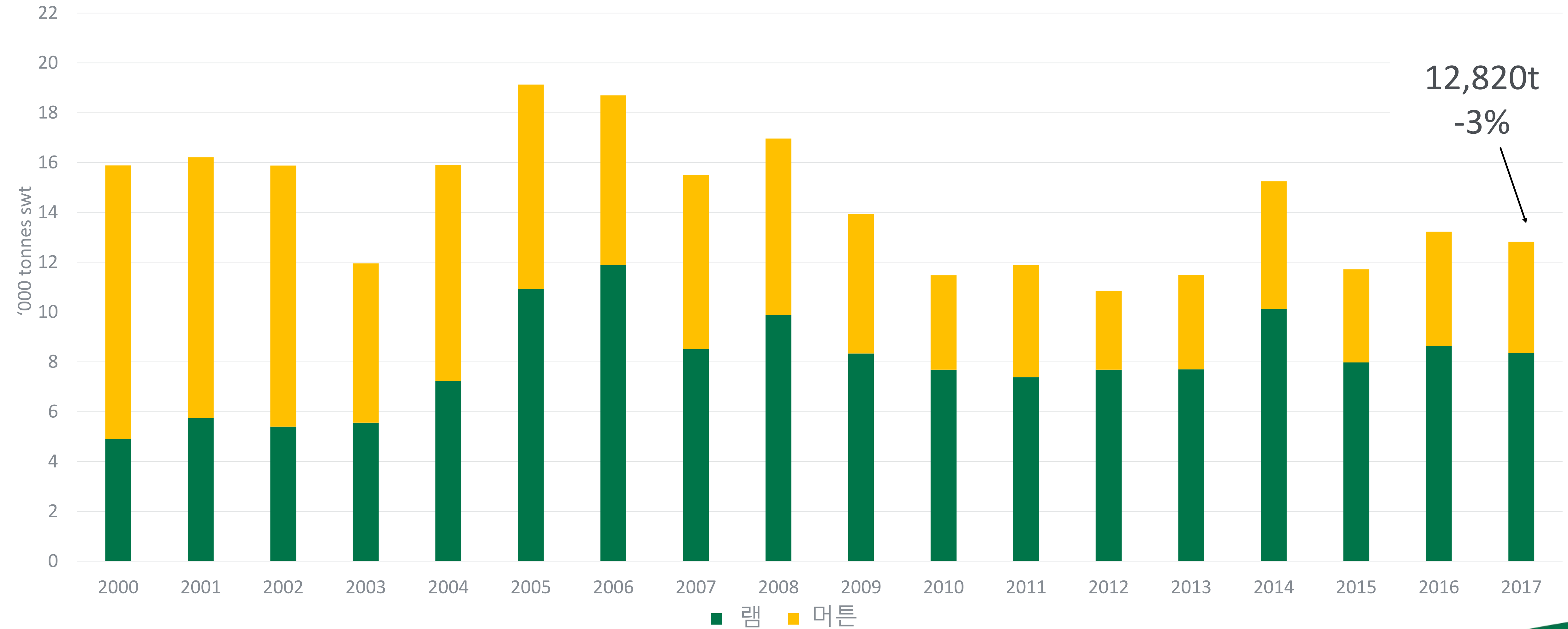
*2017 \$/kg is YTD to November for 2017
Source: DAWR, GTA

중국으로 양고기 수출 계속된 불안정함



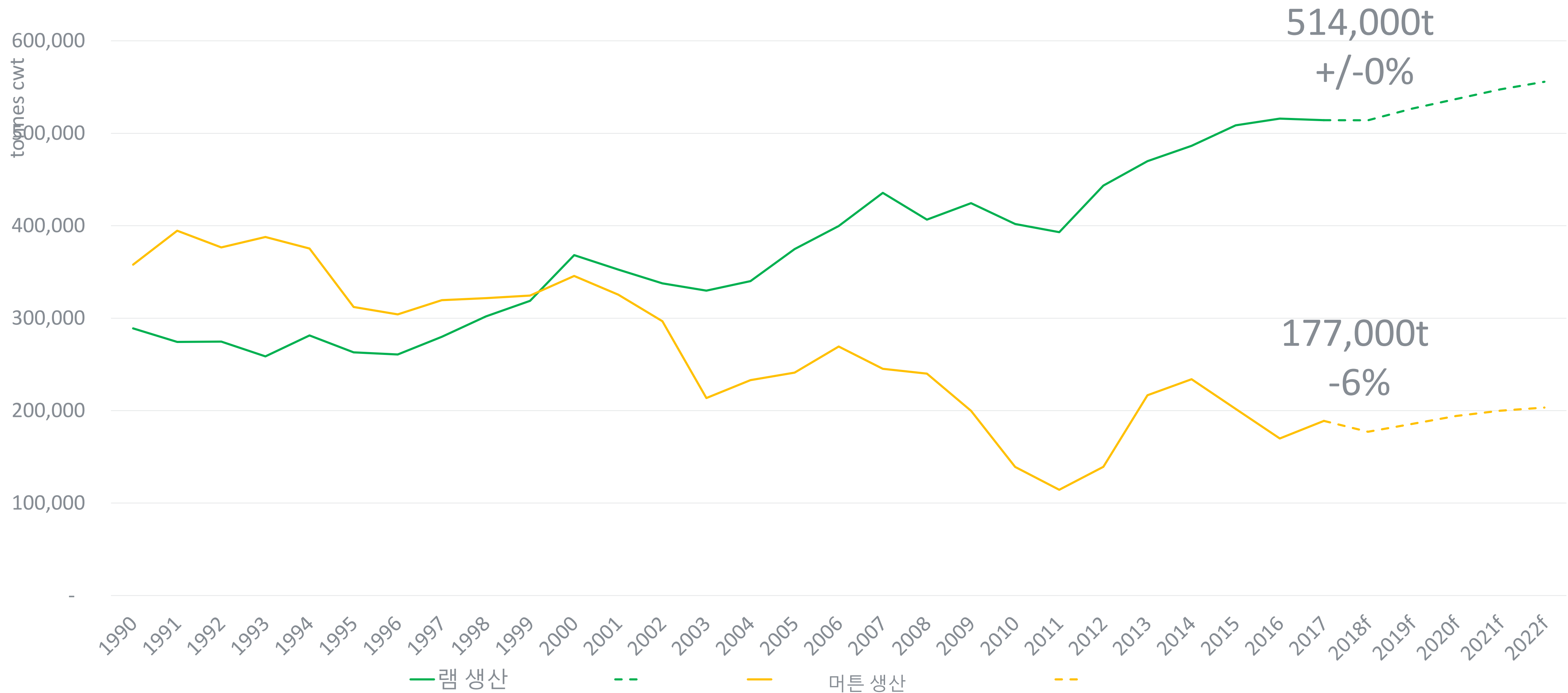
*2017 \$/kg is YTD to November for 2017
Source: DAWR, GTA

일본으로 양고기 수출



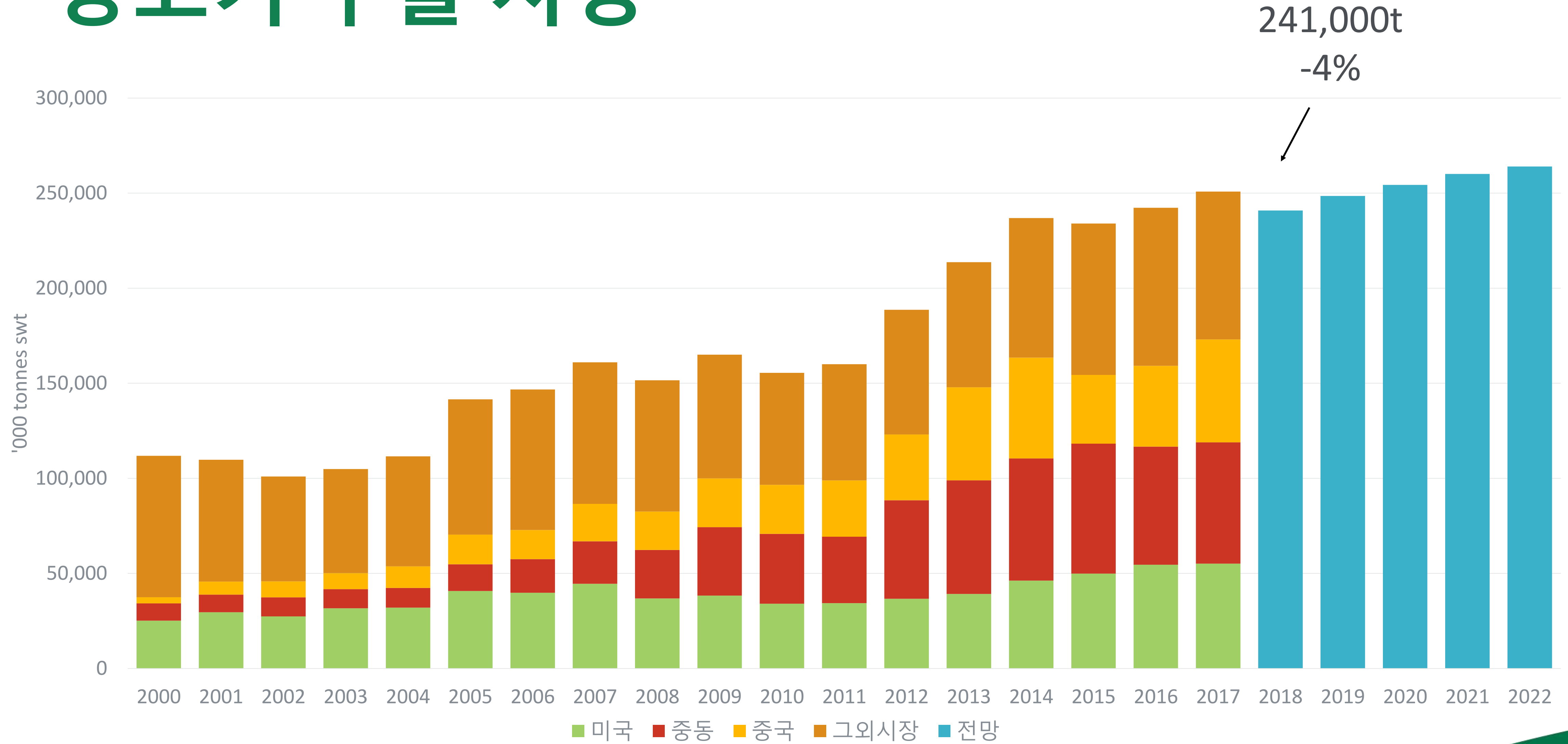
*2017 \$/kg is YTD to November for 2017
Source: DAWR, GTA

양고기와 머튼 생산



Source: ABS and MLA forecasts

양고기 수출 시장



■ 미국 ■ 중동 ■ 중국 ■ 그외시장 ■ 전망

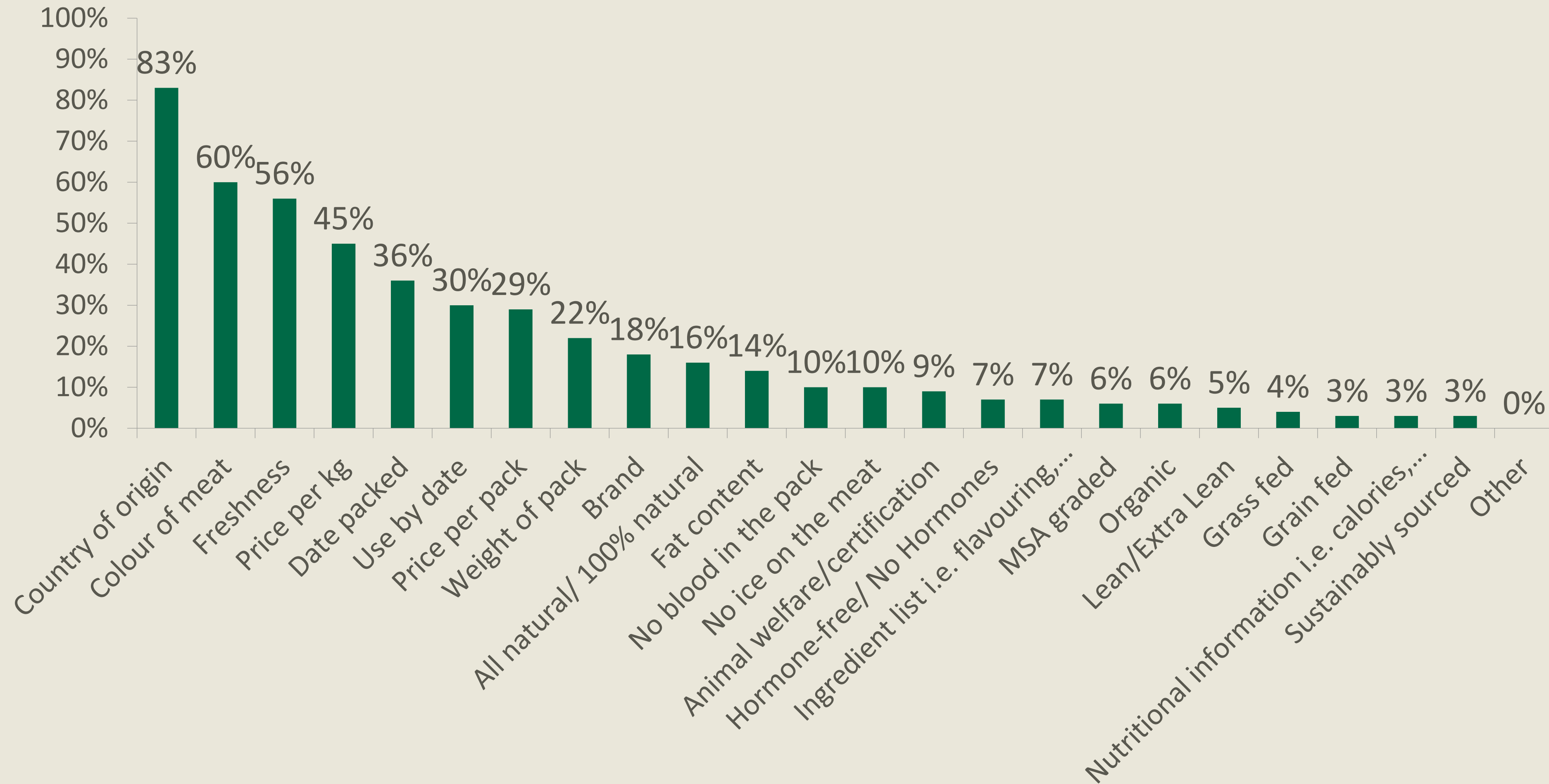
Source: DAWR, MLA estimates

아젠다

- 주요 시장 그리고 공급
- 마케팅



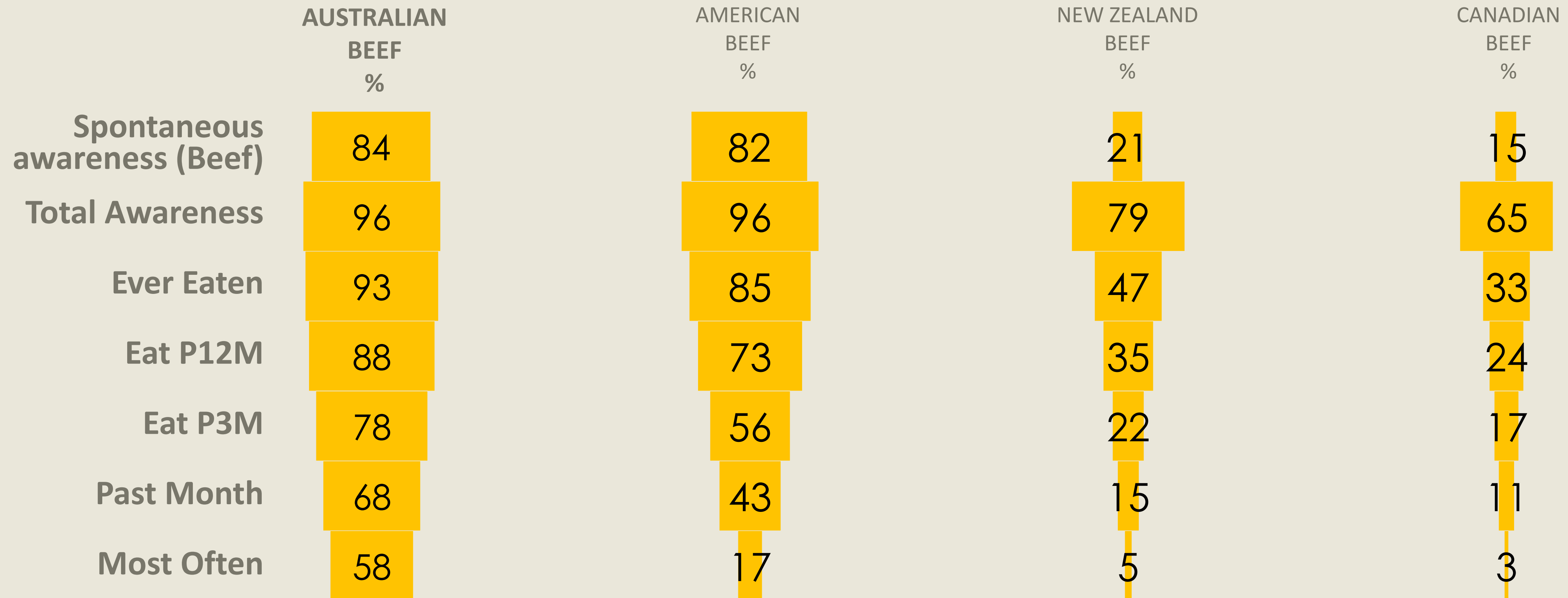
소비자 인사이트 - 한국 소비자의 원산지에 대한 중요함





수입 쇠고기 구매 1위 호주산

BRAND HEALTH – BEEF



▲▼ Sig. different at 95%

Australia beef image versus competitors

Highest endorsement

	AUSTRALIAN BEEF % '17 %	AMERICAN BEEF % '17 %	NEW ZEALAND BEEF % '17 %	CANADIAN BEEF % '17 %
Freshness	51	19	25	11
Cheaper	26	47	12	10
The animal is well-cared for	53	13	32	12
The industry is environmentally sustainable	50	9	33	12
Consistent quality standards	56	22	24	11
Low in fat	39	15	20	10
Guaranteed safe to eat	60	15	32	12
Is my/ my family's favourite beef	65	21	20	9
Is the most superior beef	47	13	19	8
High nutritional value	54	25	30	18
Is easy and convenient to purchase	68	55	14	10
Offers a variety of cuts that suit the meals I make	63	41	23	15
The meat is usually tender	52	27	22	12
The fat is nicely marbled	39	28	19	10

Base: '17 (n=841), '16 (n=1000)

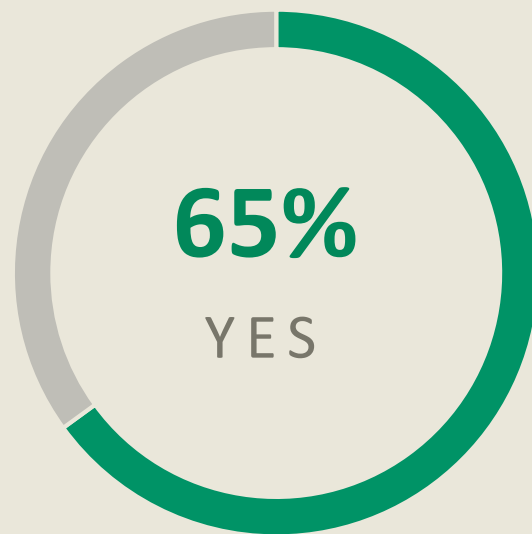
Green/red text =significantly higher/lower than previous year at 95% level

QBBH9. Here are some things which people have said about beef. We would like to know which of the following statements apply to beef from different countries of origin. You may choose as many or as few countries of origin as you wish. It doesn't matter if you don't buy any of them - it's your impressions we'd like.

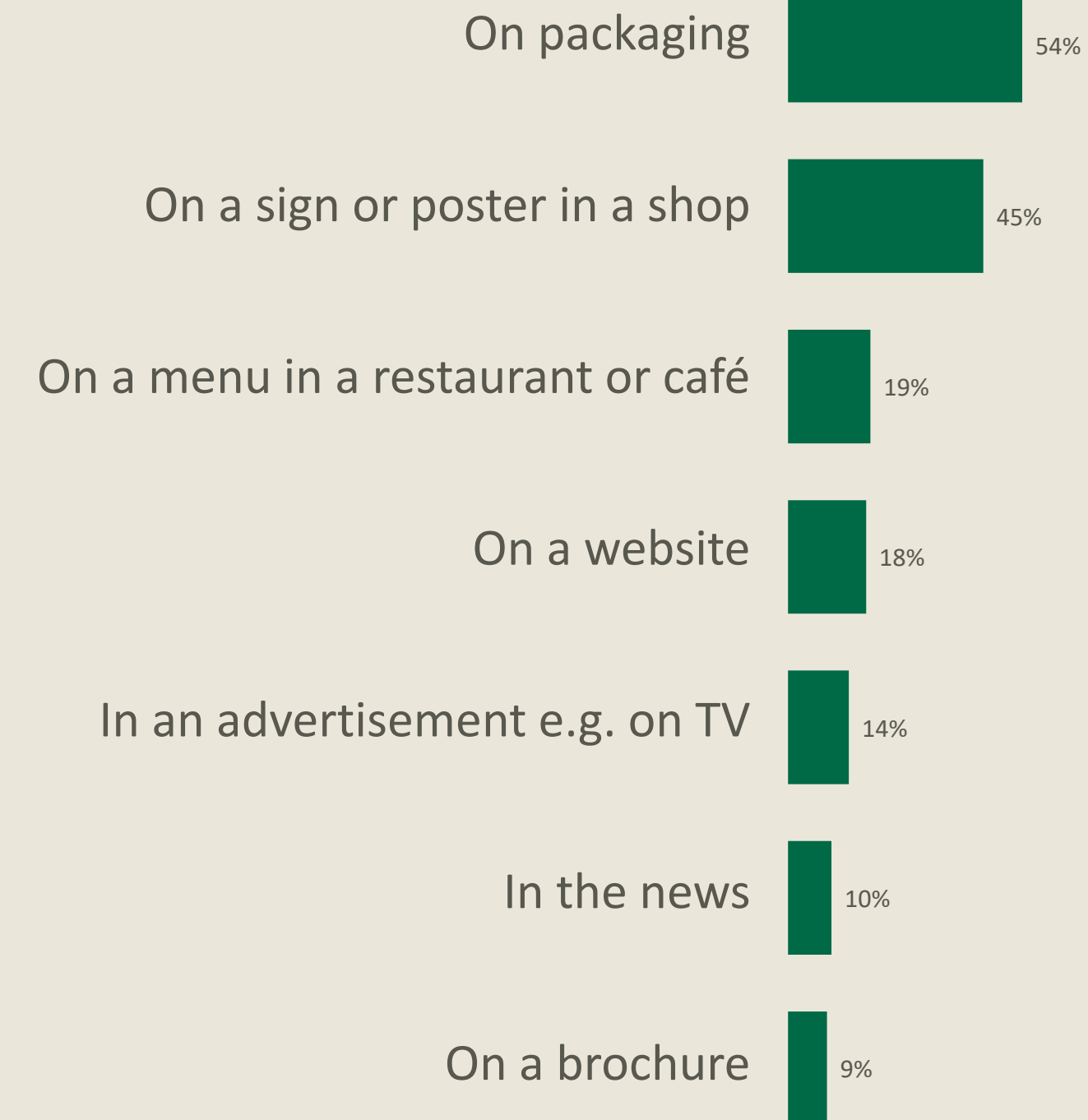


호주청정우로고 의식 65% 전세계 1위

AWARE OF LOGO



2016: 46%



QTA1. Have you heard the term "True Aussie" before?

QTA3. Have you ever seen this logo before?

NB: Sample definition varies significantly by market. These figures are not representative of total population



마케팅 프로그램

호주산 쇠고기 판매 업체들과 프로모션을 통한 매출 증가..



LOTTERIA



Mad for Garlic



emart





마케팅 프로그램 업계와의 좋은 관계 유지...

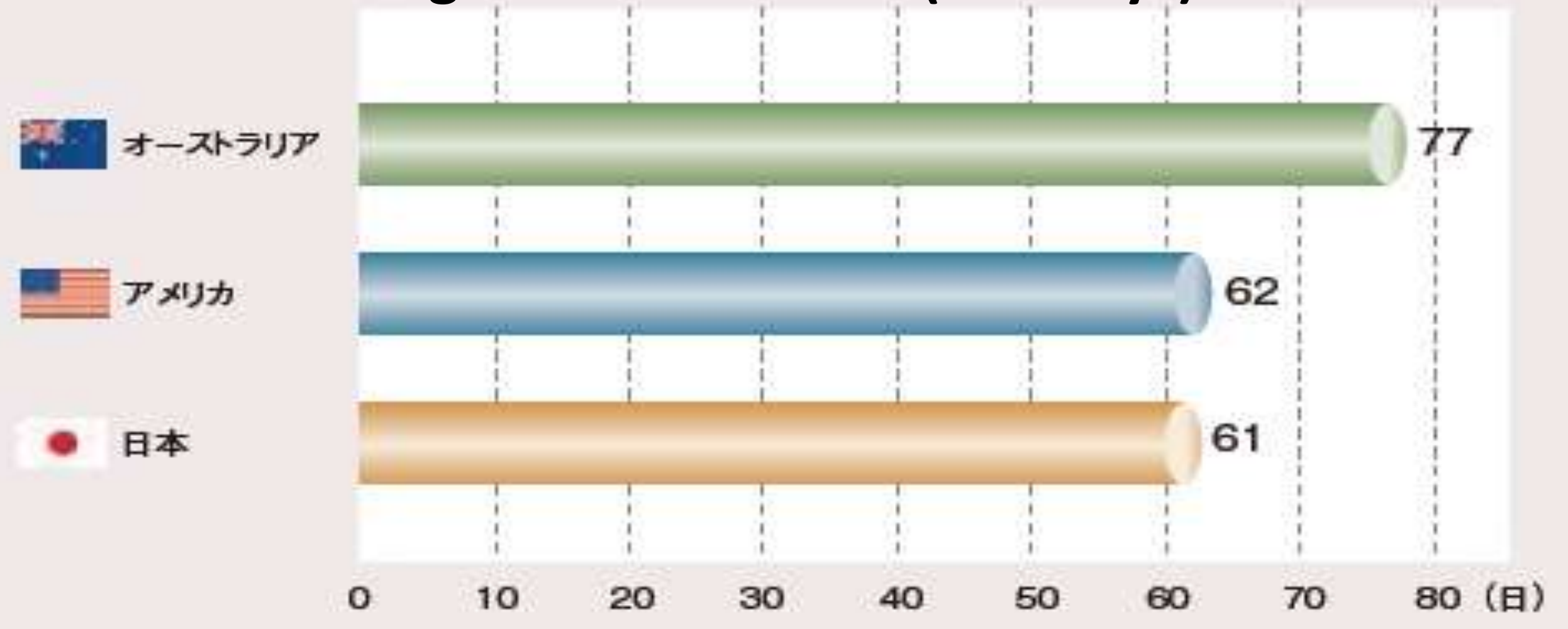




마케팅 프로그램

...산업 시스템이나 유통 기한 등에서 다른 경쟁사에 비해 더 체계적이라는 이점

Chilled shelf life guidelines – JMTA (# of days)

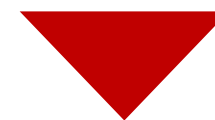


出典：日本食肉輸出入協会 日本食肉加工協会



소비자 리서치 – 호주산 쇠고기

Beef from [Good Nature]



**Good Nature makes happy cattle,
happy cattle makes tasty healthy beef**

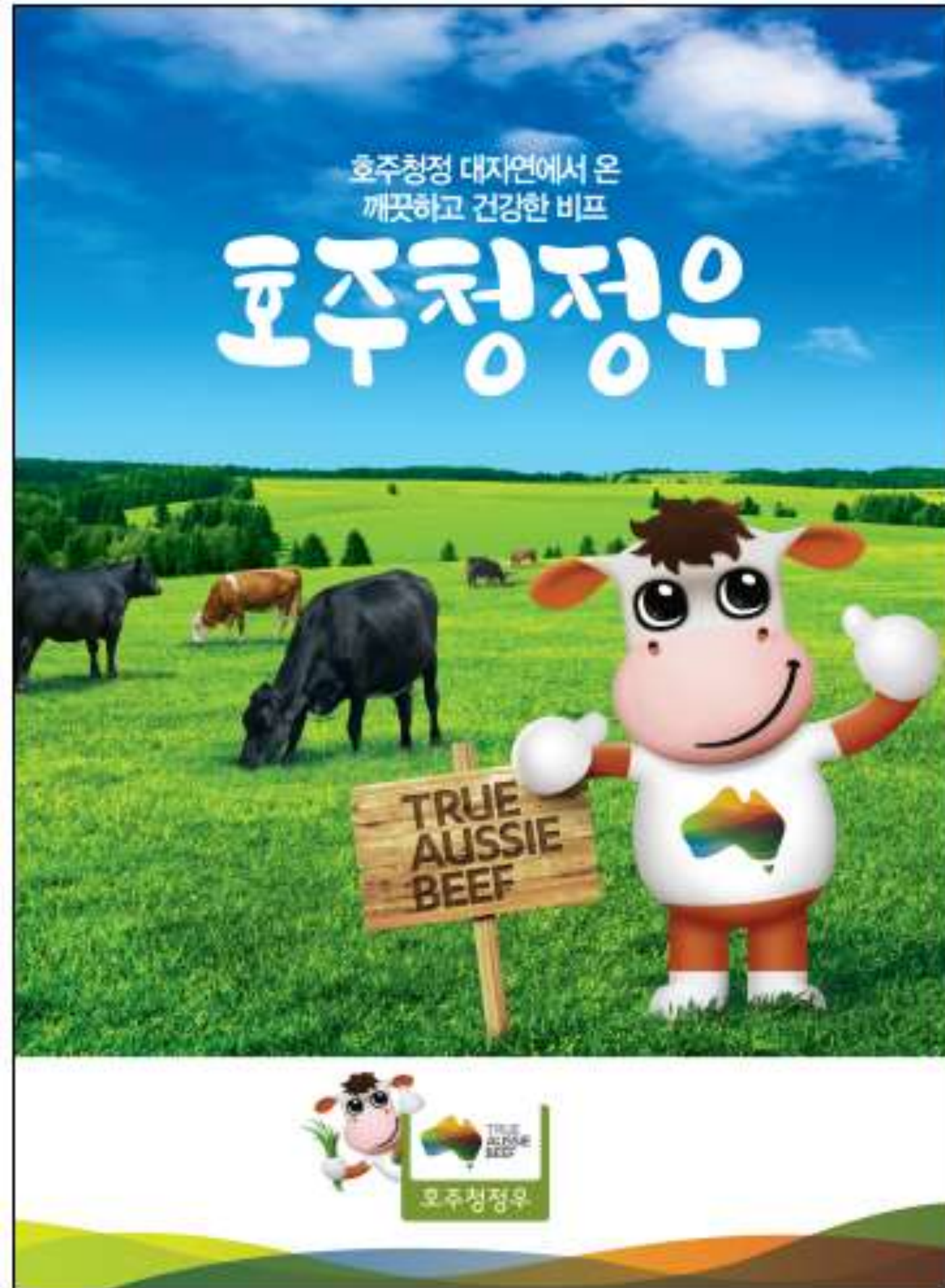
청정 자연이 행복한 소를 만들고,
행복한 소가 맛있고 건강한 비프가 됩니다



착한 환경, 착한 소고기

“Good Nature”

FY17-18 Key Visuals





결론 포인트

- 호주산 쇠고기의 주요 시장
- 원산지 프로모션에 주요 시장
- 호주산 쇠고기와 양고기 판매증가를 위해 함께 나아가길!