



소비자 이해 및 조사

Major Trends Shaping Demand for Australian Red Meat in Korea



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MEAT & LIVESTOCK AUSTRALIA

Agenda

- 호주축산공사 글로벌 소비자 조사 안내

MLA Global Consumer Tracker Introduction

- 한국의 적색 육 수요를 형성하는 주요 소비자 동향

Major consumer trends shaping red meat demand in Korea

- 코로나-19로 변화 하는 트렌드

Including trends emerging from COVID-19



호주축산공사 글로벌 소비자 조사

MLA'S GLOBAL CONSUMER TRACKER

7,300
interviews

Annual quantitative consumer survey conducted via a 20-minute online interview*

Surveying consumers about

- their meat consumption habits and attitudes
- their perception of Australian beef and lamb versus competitors
- Drivers of purchase and path to purchase in retail
- Their perception of plant based meats (except in China, Taiwan and KSA)
- Their changing behaviours during the Covid-19 crisis
- Their perception of sustainability associated with red meat (not asked in Indonesia and Taiwan)

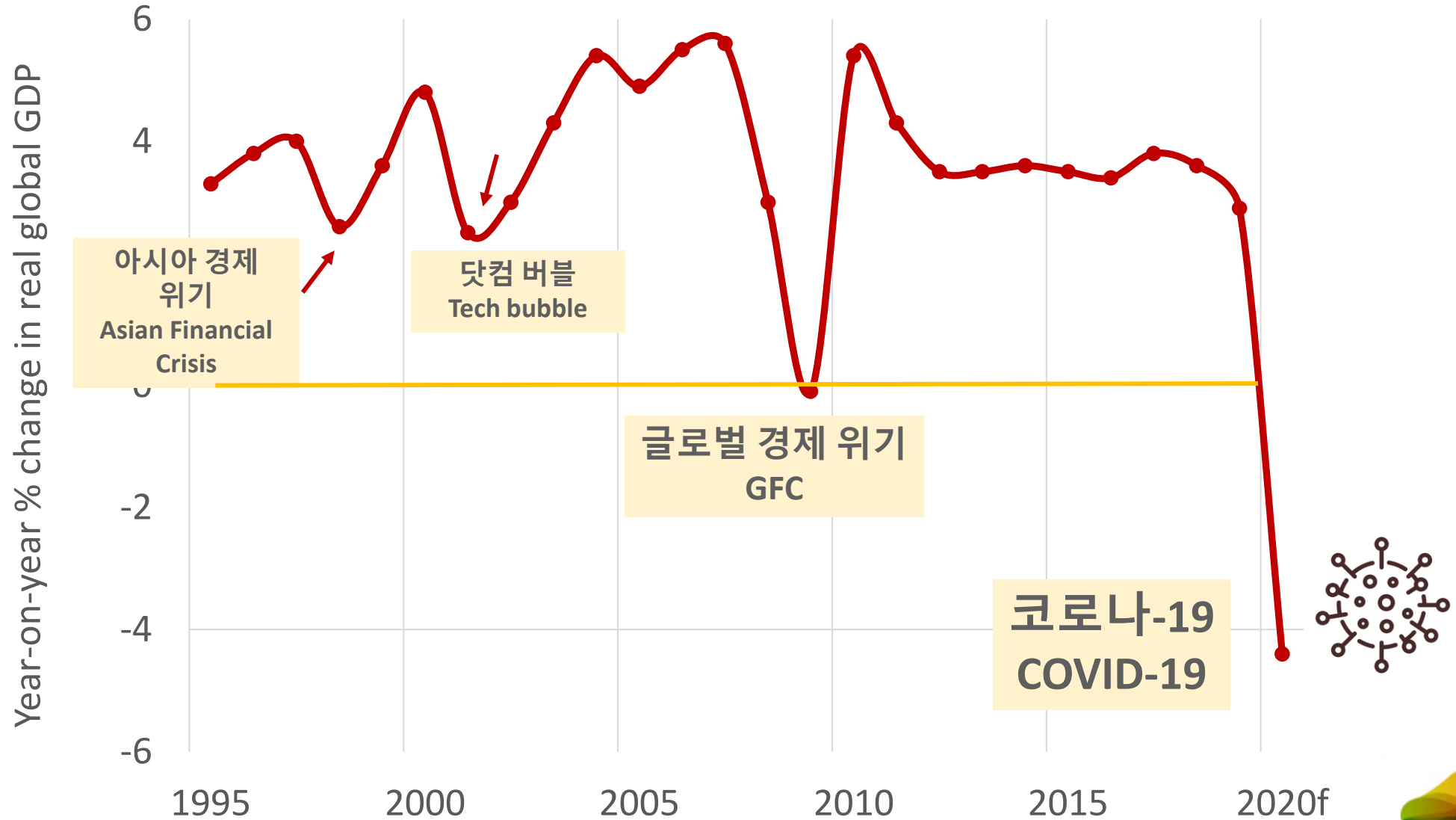
9 markets in 2020. Historical data allows tracking of trends over time

- Respondents selected are aged 18-64, and both grocery buyers and meal planners for affluent households. They are deliberately pre-selected based on their potential openness to, and ability to purchase, Australian beef and/or lamb, and are not representative of the overall market in each country.



코로나-19 로 인한 경제침체

Global economic slowdown caused by COVID-19

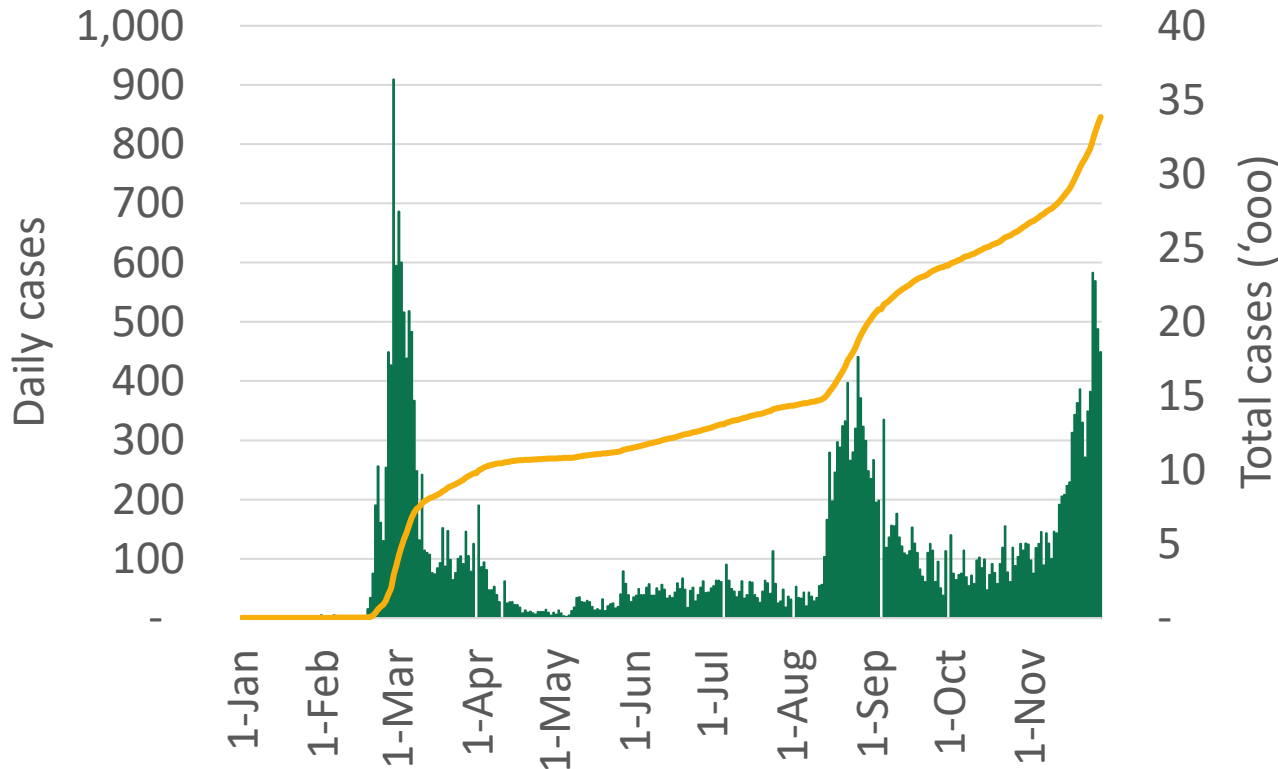


Source: IMF October Economic Outlook



한국 - 코로나-19 확진자 수 및 사회경제적 주요 영향

Korea - COVID-19 Cases and major economic impacts



■ # of new daily cases — Total # of cases (RHS)



2020 경제 성장률
Economic Growth Rate

-1.3%



2020 Q2 실업급여 청구건수
People Receiving Income Support
(10,000 people)

207만명



2020 Q1 소비지출 감소률
Purchasing Power Growth Rate

-6.6%



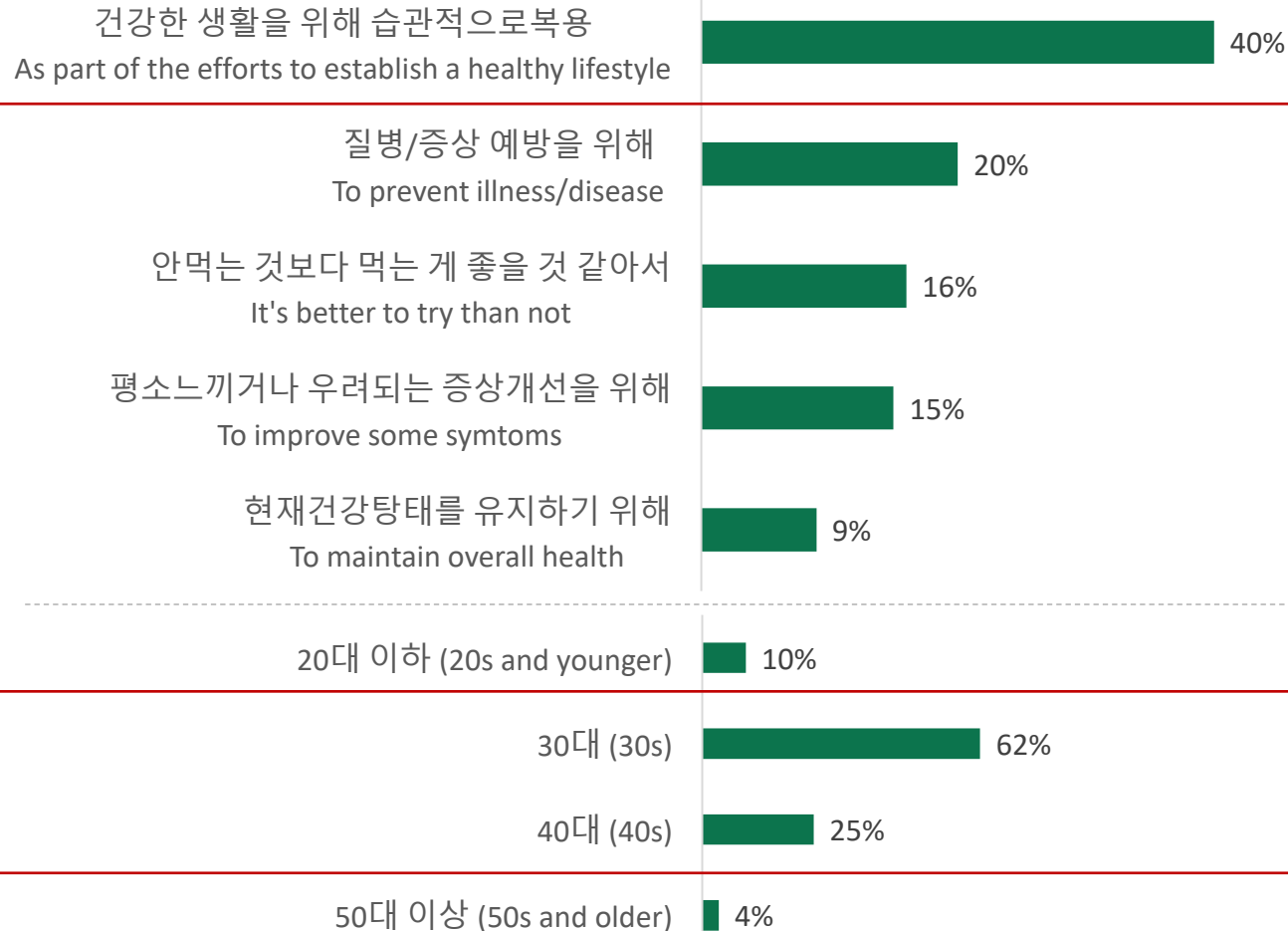
건강한 생활 및 식사
Healthy lifestyle and
healthy eating



건강한 생활에 대한 관심 급등 특히 젊은층 소비자들

Growing interest in healthy lifestyle, especially among the young consumers

건강기능식품 이용 요인/Reasons for using health-promoting food



한국 건강기능식품 시장 규모:
2014년 1조6310억원에서 지난해 (2019)
4조6000억원으로 연평균 11% 성장
Korea Health-promoting food market grew 11% in 2019
to 4.6 trillion KRW from 1.6 in 2014.

다양한 '건강 마케팅' 활동/A wide range of 'Health Marketing' in the marketplace

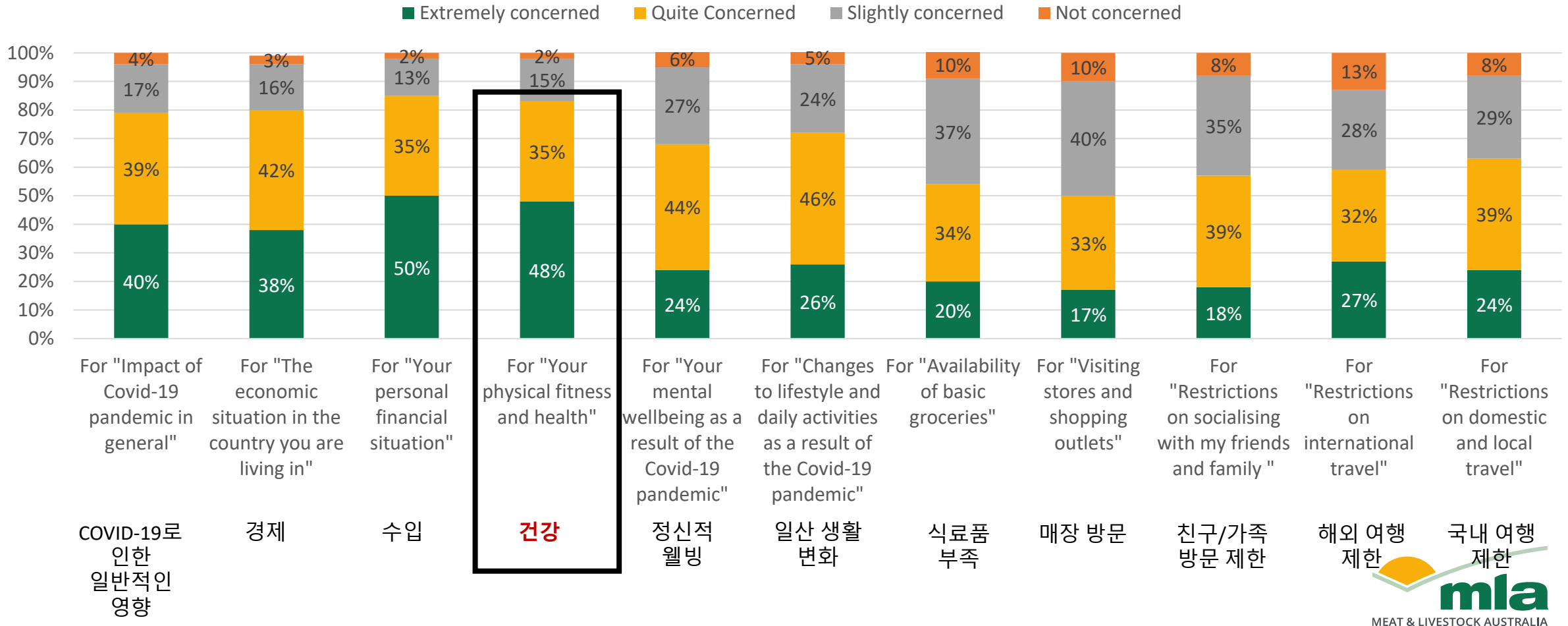


Source: GlobalData, 2020 Market Pulse Consumer Survey – South Korea. “How concerned are you about the following factors?”

코로나-19로 인한 한국 소비자들의 최고 관심사는 건강

In fact, *health* is top of mind for Korean consumers during the pandemic

COVID-19에 대해서 가장 중시하는 고려사항/Korean consumers' top concerns regarding to COVID-19



코로나-19는 건강한 음식에 대한 소비자들의 수요를 증가, 추후 계속되는 트렌드 예상

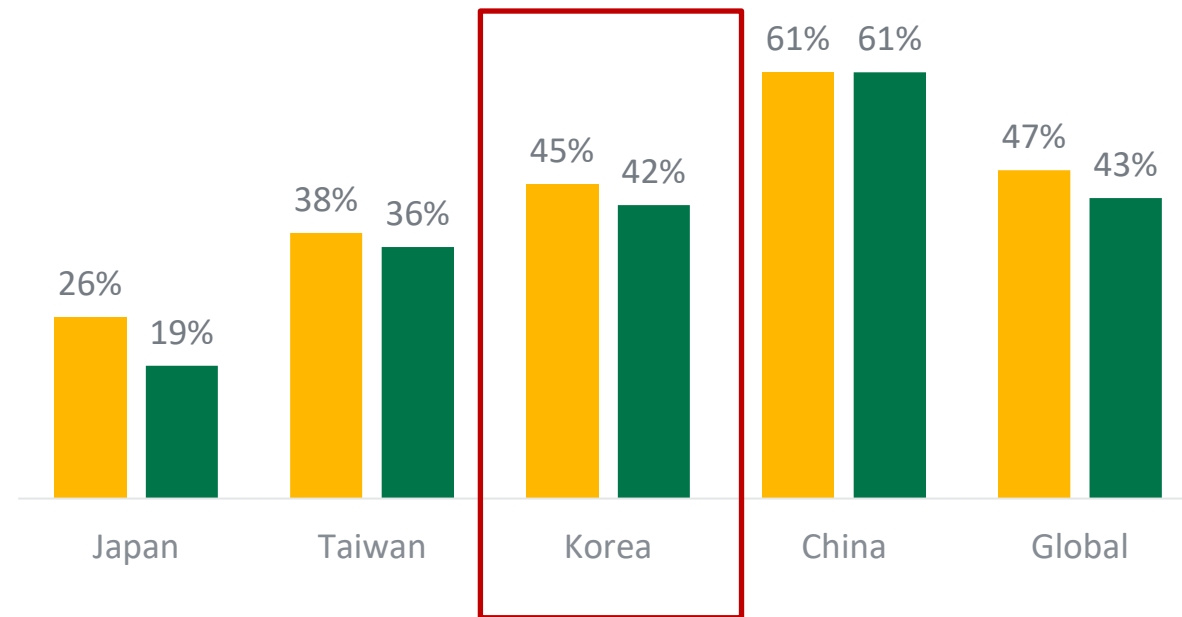
COVID-19 has accelerated healthy food choices and the trend is expected to continue going forwards

건강한 식사 습관 코로나-19 이후 vs 이전

Trying to eat healthier meals

Habits changed vs. before and after COVID-19

■ vs. before COVID-19 ■ when return to normal



편리성
Convenience



편리성 관련 수요 폭등

Rapid rise in demand for convenience



1인 가구 증가
Growing single person
households



사회에서 여성의 역할
증대
Growing role of women
in the society

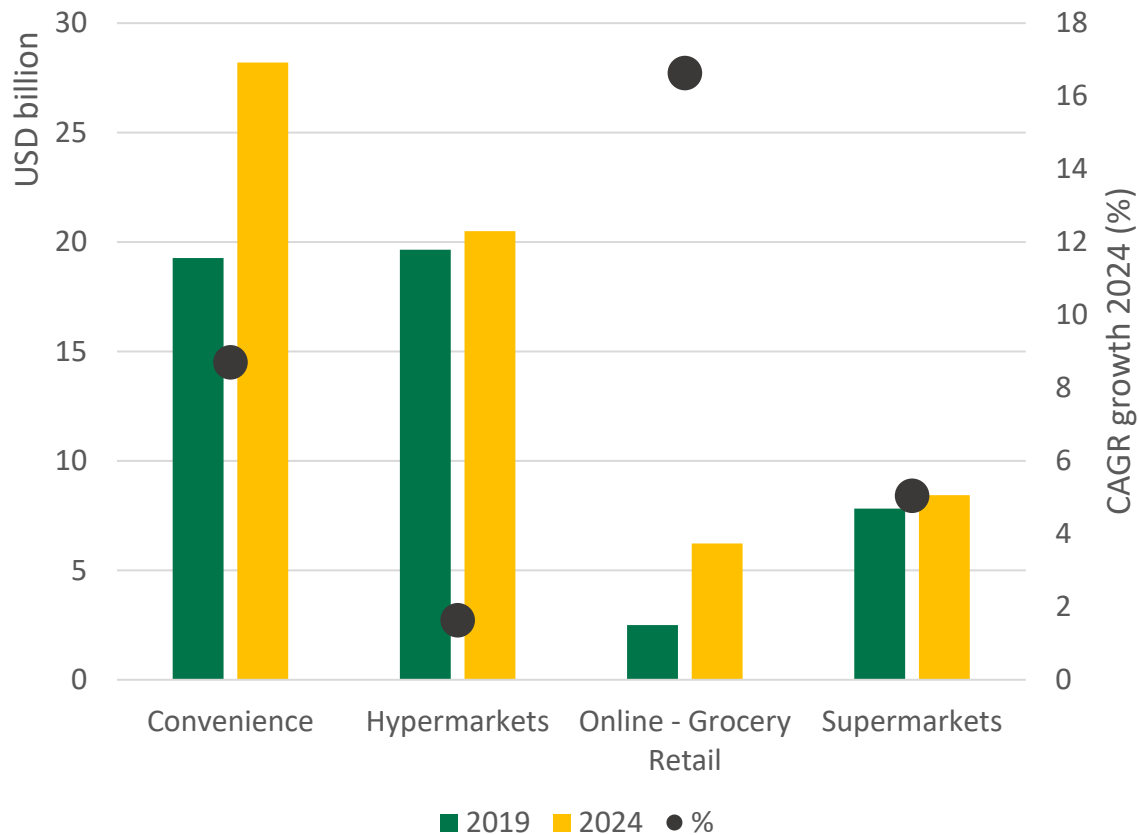


바쁜 생활
Busier lifestyle

온라인 및 편의점 채널의 성장

Online and convenience channels growing

한국 리테일 세일즈 Korea retail sales by channel



온라인 구매 이유 Reasons for shopping online

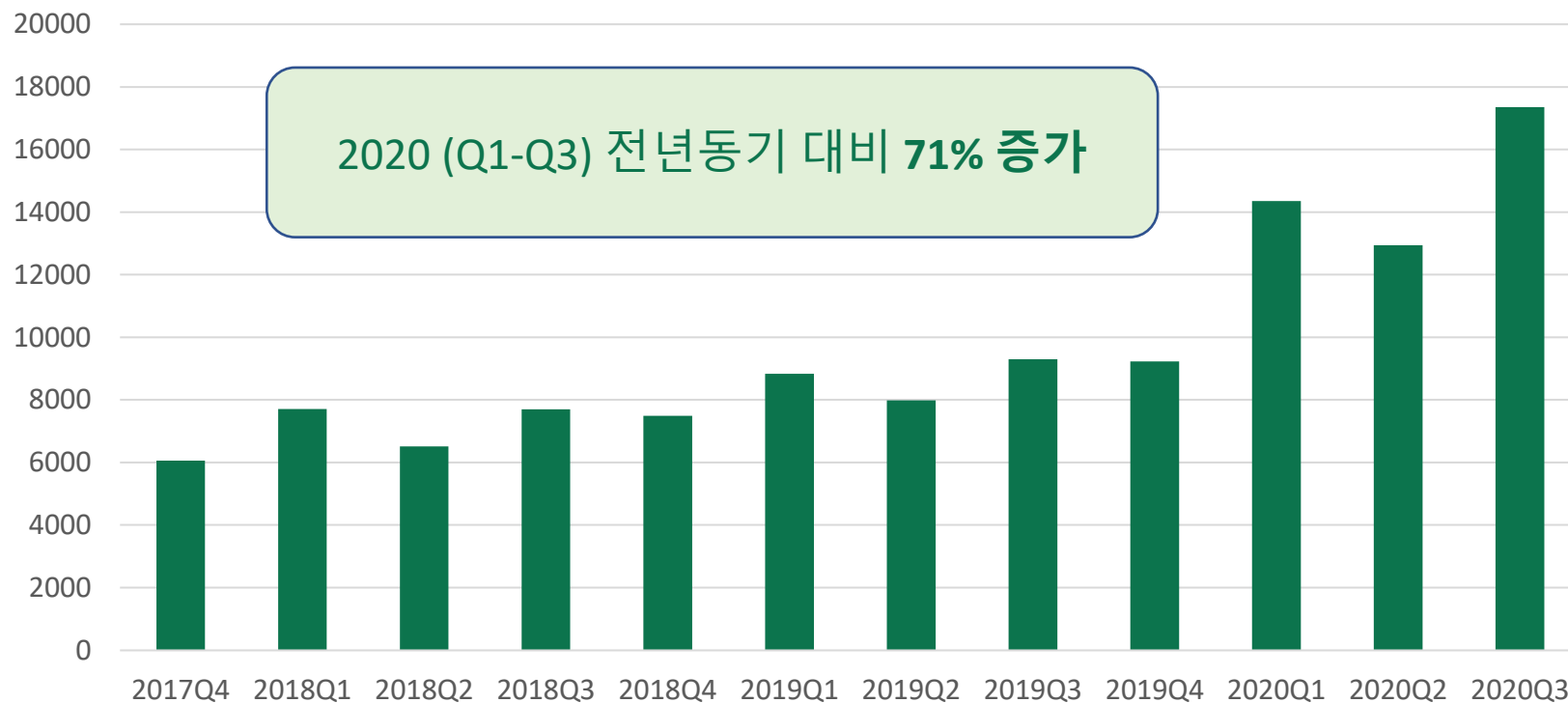


신선식품 올해 온라인 최고 성장

Fresh products is the fastest-growing category sold online so far this year

신선식품 온라인 거래액 (억원)

Fresh product online sales (100 million KRW)



약 25%의 소비자들은
코로나-19 이전 보다
온라인으로 더 많은
육류 구매

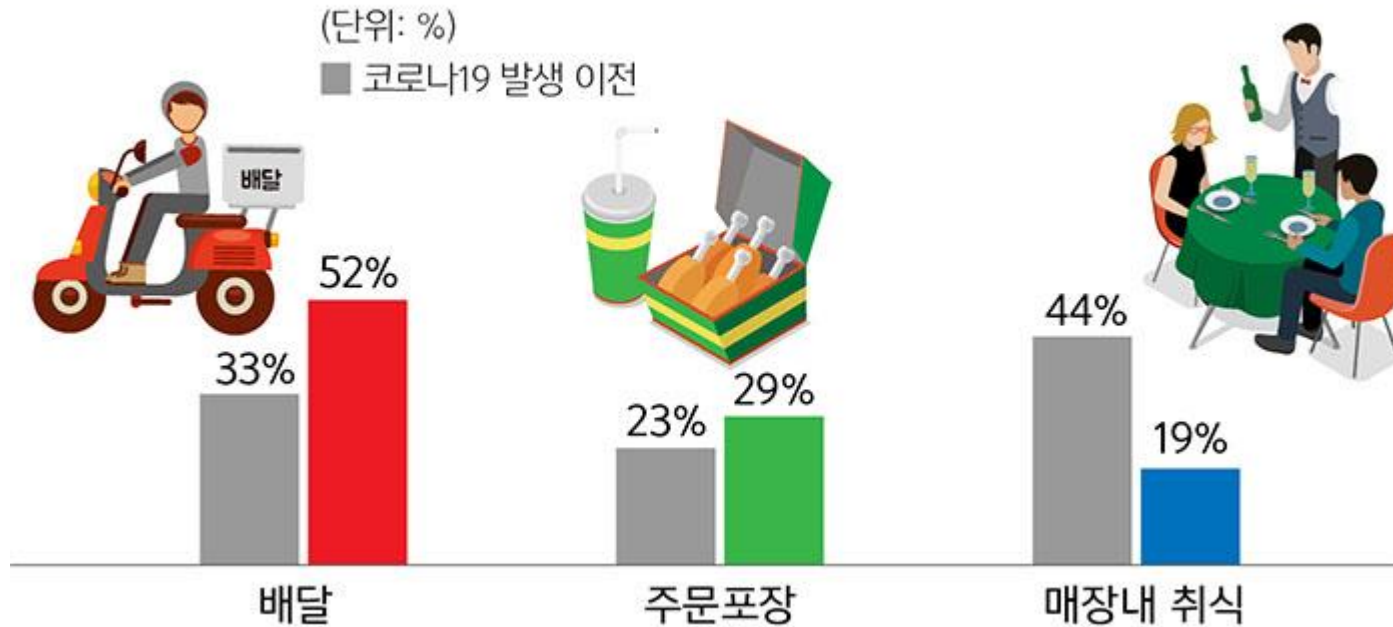
25% consumers say they have
purchased much more red meat online
vs before the pandemic



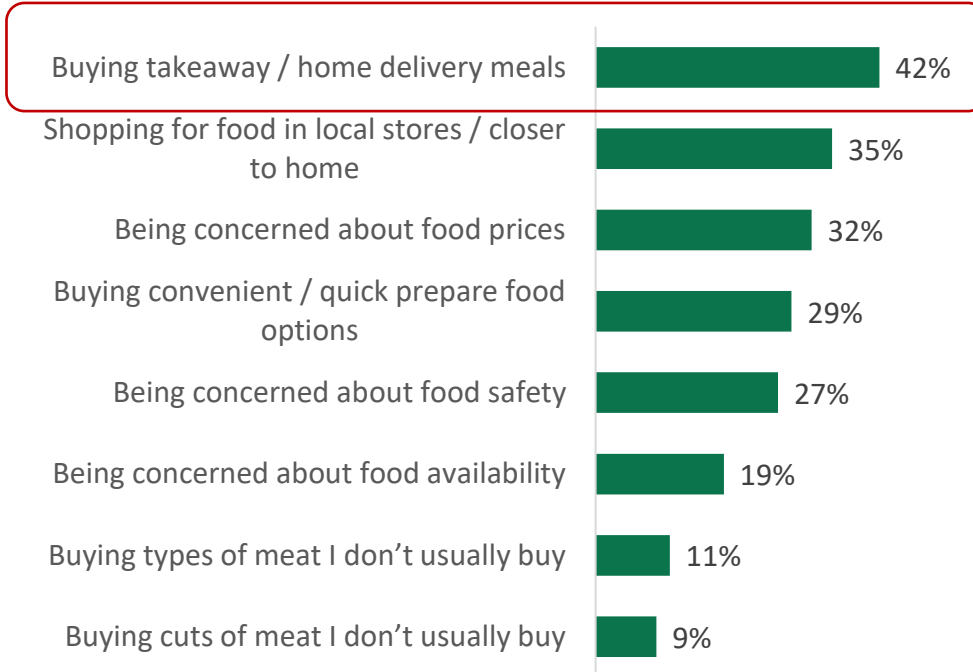
코로나-19로 온라인 식품 배달도 증가

COVID-19 has also accelerated online food delivery

코로나19 사태 후 외식 변화 (2020 Q1)



Shopping habits changed vs before COVID-19



HMR 시장의 급 성장

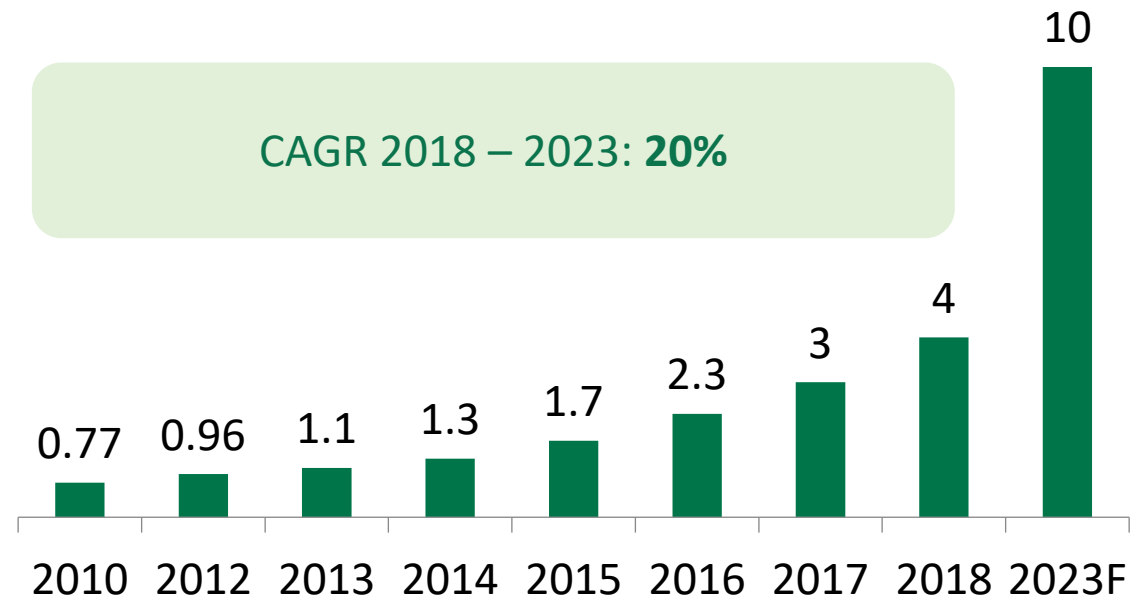
HMR market is growing rapidly

HMR 시장의 규모

Size of HMR market

단위: 조

Unit: trillion KRW



홈 쿠킹

Home cooking



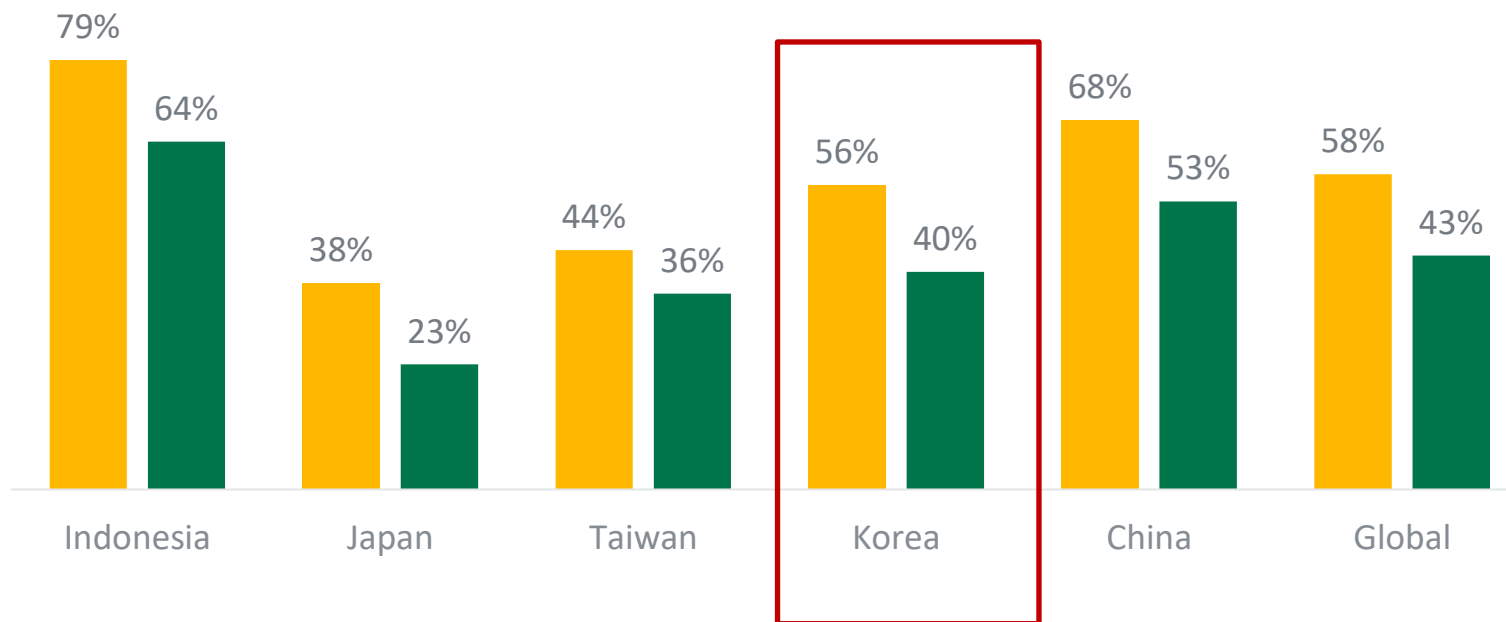
코로나-19로 인한 홈쿠킹 트렌드 활성화

COVID-19 pandemic is shaping home cooking trends

홈 쿠킹 코로나-19 이전 vs 이후
Cooking at home

Habits changed vs. before and after COVID-19

■ vs. before COVID-19 ■ when return to normal



원산지 – 호주산의 이미지

COO – Australia's place in the market



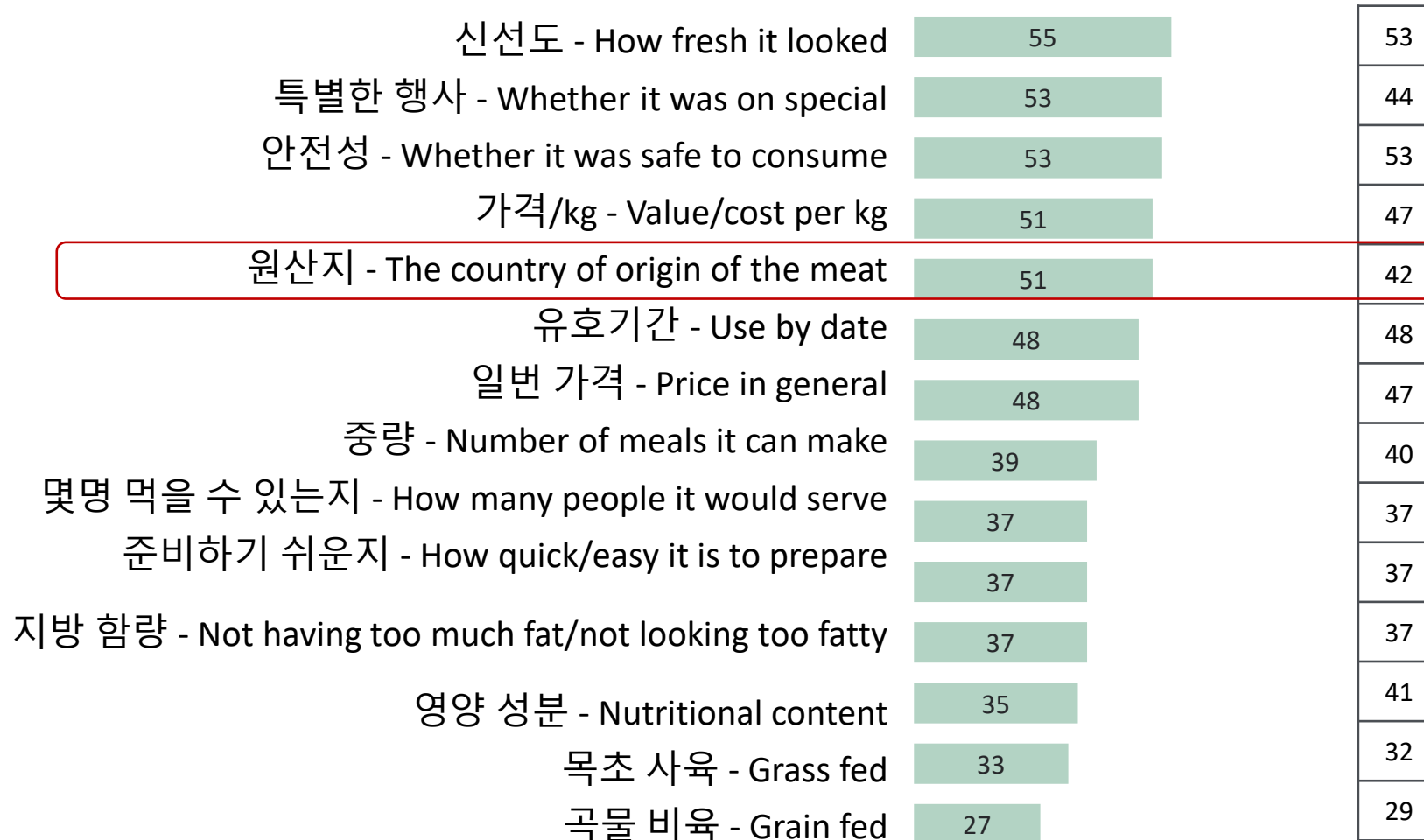
육류 구매시 다른 시장 보다 한국에서는 원산지가 중요함

COO is more important in Korea vs other markets when it comes to buying red meat

COVID-19 발생이후 육류 구매시 중요하는 것이 무엇입니까?

Which factors are more important when buying red meat since COVID-19 outbreak?

GLOBAL AVERAGE

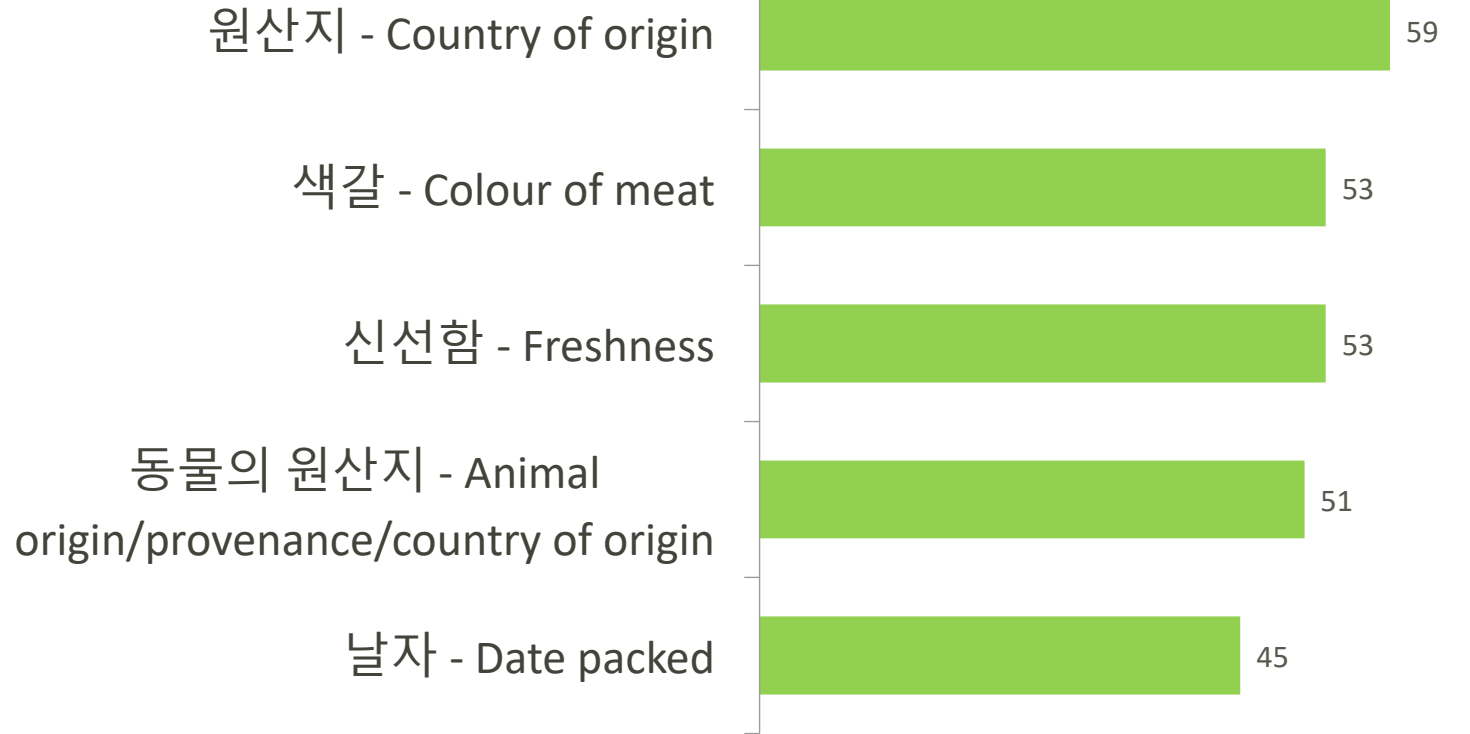


쇠고기를 구매 시 어떤 것들을 보시나요?

What do you look for (on the pack, on the shelf etc) when buying beef?



답변 : 상위 5개 (Answer: top 5)



글로벌 소비자들은 육류 구매 시 의사결정을 미치는 영향

Important factors influencing purchasing decisions when selecting between meat proteins

HIGHEST CORRELATION WITH VOLUME OF PURCHASE - GLOBAL

			2018	2017		2018				2017	2019	2019		2018		2018
Japan	Korea	China	Hong Kong	Singapore	Malaysia	Thailand	Indonesia	Saudi	UAE	Jordan	Qatar	Kuwait	USA	Mexico	Taiwan	UK
Is my/my family's favourite meat	Is my/my family's favourite meat	Is my/my family's favourite meat	Is my/my family's favourite meat	Is my/my family's favourite meat	Fresh	Is easy and convenient to prepare	Is my/my family's favourite meat	Is my/my family's favourite meat	Is my/my family's favourite meat	Is my/my family's favourite meat	Is my/my family's favourite meat	Is my/my family's favourite meat	Is my/my family's favourite meat	Is my/my family's favourite meat	Is my/my family's favourite meat	Is my/my family's favourite meat
Consistent quality standards	Is easy and convenient to prepare	Is easy and convenient to prepare	The industry is environmentally sustainable	Is easy and convenient to prepare	Is my/my family's favourite meat	Is my/my family's favourite meat	Is easy and convenient to prepare	Tastes delicious	Tastes delicious	Tastes delicious	Fresh	Is easy and convenient to prepare	Is easy and convenient to prepare	Can be used in many different meals	Is easy and convenient to prepare	The meat is usually tender
Is easy and convenient to purchase	I am willing to pay a bit more for this meat	Consistent quality standards	The meat is usually tender	Consistent quality standards	Tastes delicious	Consistent quality standards	Is easy and convenient to purchase	Can be used in many different meals	Is easy and convenient to purchase	Fresh	High nutritional value	Is easy and convenient to purchase	Is easy and convenient to purchase	Is easy and convenient to purchase	Is easy and convenient to purchase	Is an essential part of a healthy diet for growing children
Is easy and convenient to prepare	Is easy and convenient to purchase	Can be used in many different meals	Consistent quality standards	Is an essential part of a healthy diet for growing children	Is easy and convenient to purchase	The meat is usually tender	Can be used in many different meals	Is an essential part of a healthy diet for growing children	Is easy and convenient to purchase	Is easy and convenient to purchase	The industry is environmentally sustainable	Tastes delicious	I am willing to pay a bit more for this meat	Is an essential part of a healthy diet for growing children	I am willing to pay a bit more for this meat	I am willing to pay a bit more for this meat
Is an essential part of a healthy diet for growing children	Is the most superior meat	Is easy and convenient to purchase	Guaranteed safe to eat	Tastes delicious	I am willing to pay a bit more for this meat	Fresh	Consistent quality standards	Is easy and convenient to prepare	Guaranteed safe to eat	Is easy and convenient to prepare	Is the most superior meat	Is an essential part of a healthy diet for growing children	Tastes delicious	The industry is environmentally sustainable	The animal is well-cared for	Tastes delicious

육류를 구매 시 한국 소비자들이 중요하게 생각하는 것들은? (in Korean please)



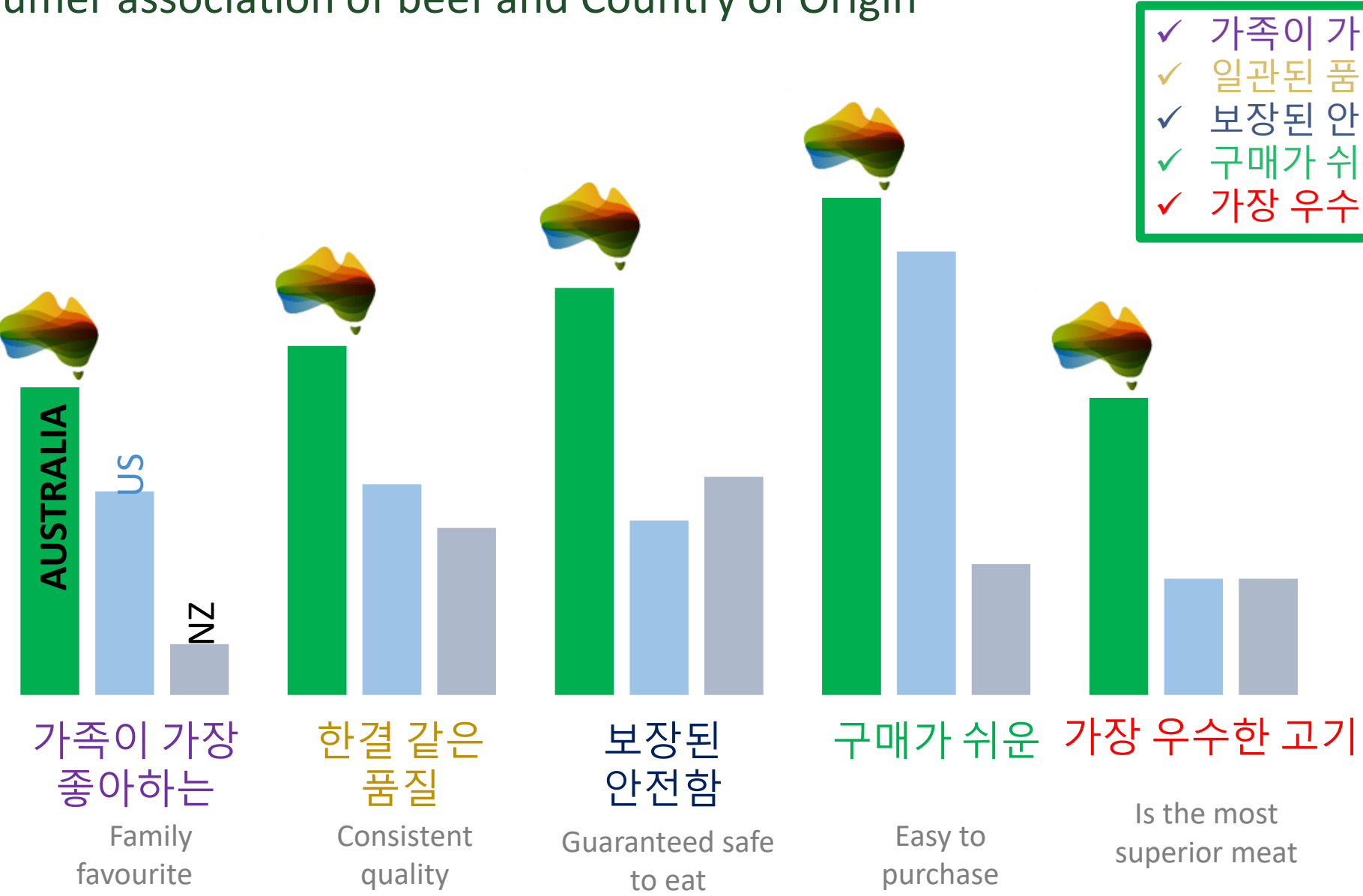
HIGHEST CORRELATION WITH VOLUME OF PURCHASE - GLOBAL

2018	2017	2018	2017	2019	2019	2018	2018
Japan	Korea	China	Hong Kong	Singapore	Malaysia	Thailand	Indonesia
Is my/my family's favourite meat	Is my/my family's favourite meat	Is my/my family's favourite meat					
Consistent quality standards	Is easy and convenient to prepare	Is easy and convenient to prepare					
Is easy and convenient to purchase	I am willing to pay a bit more for this meat	Consistent quality standards					
Is easy and convenient to prepare	Is easy and convenient to purchase	Can be used in many different meals					
Is an essential part of a healthy diet for growing children	Is the most superior meat	Is easy and convenient to purchase	Guaranteed safe to eat	Tastes delicious	I am willing to pay a bit more for this meat	Fresh	Consistent quality standards

가족이 가장 좋아하는 Family favourite
준비하기 쉬운 Easy to prepare
더 지불할 의향이 있는 Willing to pay more for this meat
구매가 쉬운 Easy to purchase
가장 우수한 고기 Is the most superior meat

호주산 쇠고기의 이미지는 ?

Consumer association of beef and Country of Origin



- ✓ 가족이 가장 좋아하는 Family favourite
- ✓ 일관된 품질 Consistent quality
- ✓ 보장된 안전함 Guaranteed safe to eat
- ✓ 구매가 쉬운 Easy to purchase
- ✓ 가장 우수한 고기 Is the most superior meat

한국 시장 호주산 육류 수요 트렌드 요약

Major trends shaping demand for Australian red meat in Korea in summary



건강한
식사 및 생활 습관
Healthy eating; Healthy
lifestyle



편의성
Convenience



홈쿠킹
Home cooking



가족이
가장 좋아하는
Family favourite



원산지 및 한국
소비자들의 호주산
선호
COO & Korean consumers'
affinity for Australian red
meat



트렌드들은 서로 배타적이지 않는다.
Often, trends are not mutually exclusive.

감사합니다!
Thank you!