



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

May 2025

MLA disclaimer

All information contained within this presentation and supplied in connection with it, including any oral commentary and answers to questions, is supplied to recipients for information purposes only. No representation, warranty or other assurance is made as to the currency, fairness, accuracy or completeness of the information contained within this presentation or supplied in connection with it. The information contained within this presentation is in summary form only and is not, and does not purport to be, comprehensive or contain all information that any recipient may require or consider material.

Although all care has been taken in preparing this presentation, viewers of this presentation should not alter their position, or refrain from doing so, relying on this presentation, and should seek independent advice for their own situation. Any forward-looking statements made within this publication are not guarantees of future performance or results, and performance or results may vary from those expressed in, or implied by, any forward-looking statements. No representation, warranty or other assurance is given as to the fairness, accuracy, completeness, likelihood of achievement or reasonableness of forward-looking statements or related assumptions contained in the publication. Your use of, or reliance on, any content is entirely at your own risk and MLA, MDC and ISC (“MLA Group”) accept no liability for any losses or damages incurred by you as a result of that use or reliance.

The views or judgements expressed within this presentation are those of the author and not the MLA Group. These views and judgements do not reflect the views and judgments of the MLA Group, its employees or agents.

Full terms can be found here: [MLA Terms of Use](#). You may not copy, republish, download, transmit, communicate, or otherwise use this content in any way without the prior written consent of Meat & Livestock Australia Limited ABN 39 081 678 364. Any such enquiries should be directed to info@mla.com.au, or the Content Manager, PO Box 1961, North Sydney, NSW 2059.

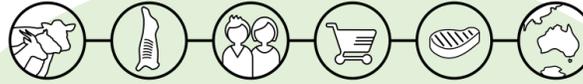
Key Take-Aways



Quality is the #2 most important factor for Singaporeans buying red meat, after **freshness**



Country of Origin indicates **safety**, **quality** and **trustworthiness**



Australia's **traceability system** underpins trust by providing information **transparency**, supporting **authenticity** of claims



Trust in the producer country depends on the **safety & quality systems**



Australia is highly **trusted**, with high food safety standards and practices

MLA research introduction

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



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

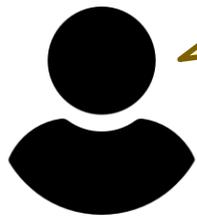


Coverage: 7 countries, including Singapore, 4 X focus groups with purchasers of imported red meat



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

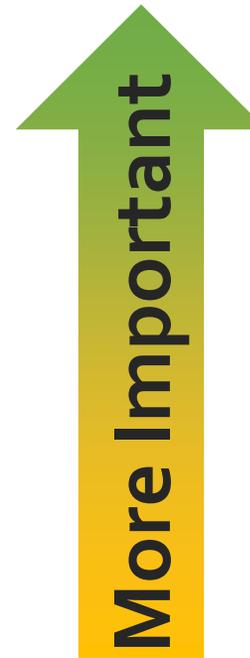
Freshness is Singapore consumers' top consideration as it directly impacts on health, followed by Quality for optimum enjoyment, and then Country of Origin is considered for food safety, reliability and trustworthiness.



"Actually, for the country of origin, sometimes I may be prepared to pay more because let's say I have to choose between frozen beef from Brazil versus frozen beef from Australia. There is really a price premium. These are more the day-to-day choice when it comes to that cost difference" - (Older, Singapore)



Ranking of factors when buying beef to eat at home



1

Freshness

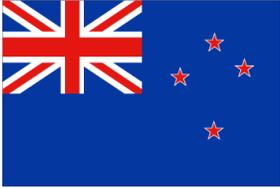
2

Quality

3

Country of Origin

Country-of-origin is closely linked in consumers' minds with beef Safety, Reliability and Trustworthiness

	1	2	3	4	5	6
Associations						
	<ul style="list-style-type: none">✓ <i>Delicious</i>✓ <i>High integrity</i>✓ <i>High standards</i>	<ul style="list-style-type: none">✓ <i>Free range</i>✓ <i>Natural</i>✓ <i>Safe</i>✓ <i>Strict</i>	<ul style="list-style-type: none">✓ <i>Reliable high quality</i>✓ <i>Trustworthy</i>✓ <i>Safe & Strict</i>✓ <i>Established Halal system</i>	<ul style="list-style-type: none">✓ <i>Fresh</i>✓ <i>Safe to eat</i>✓ <i>Acceptable quality</i>✓ <i>Halal guarantee</i>	<ul style="list-style-type: none">✓ <i>Supposedly quality cut meat</i>	<ul style="list-style-type: none">✓ <i>Acceptable quality</i>✓ <i>Affordable</i>

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



Confidence in Singaporean consumers' red meat decision-making depends on **Trust** in the product's safety.

Quality has a direct relationship with Trustworthiness.

Indicators of Trust:

- Government standards
- Retailer reputation
- Country reputation
- Positive experience
- Absence of negative media

Trust



Consumer benefits:

- Peace of mind
- Reduced safety and quality risk
- Assurance of not harming the family

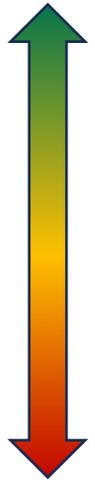


"Trust is like knowing that it's safe and it passes the regulations, like food safety regulations"

(Younger, Singapore)

Highly trusted countries lead consumers to believe in the consistency of high-quality beef they offer

Trust
HIGH



LOW



JAPAN

Known for honesty, integrity and high work standards

AUSTRALIA

Known for high food safety standards and practices

NZ

Similar to Australia but also known for lush pastures, considered more natural

MALAYSIA

Perception of the use of low-tech farming, undernourished cattle, mad cow disease

US

Large-scale livestock and food production, mad cow disease

**ARGENTINA
& BRAZIL**

Not much detail known, generally 'acceptable' quality of frozen meat

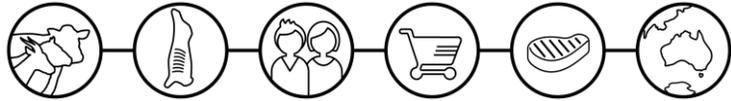
"I just go for the 'normal countries' - Australia, New Zealand, Japan, these are the countries that sell quality beef"
(Younger, Singapore)



Traceability is appreciated by Singaporean consumers as a support for information transparency to underpin product authenticity and verifiability of claims

← Transparency of verifiable information across the supply chain →

Traceability



- ✓ Safety
- ✓ Quality
- ✓ Transparency
- ✓ Halal compliance
- ✓ Ethical standards



Trust



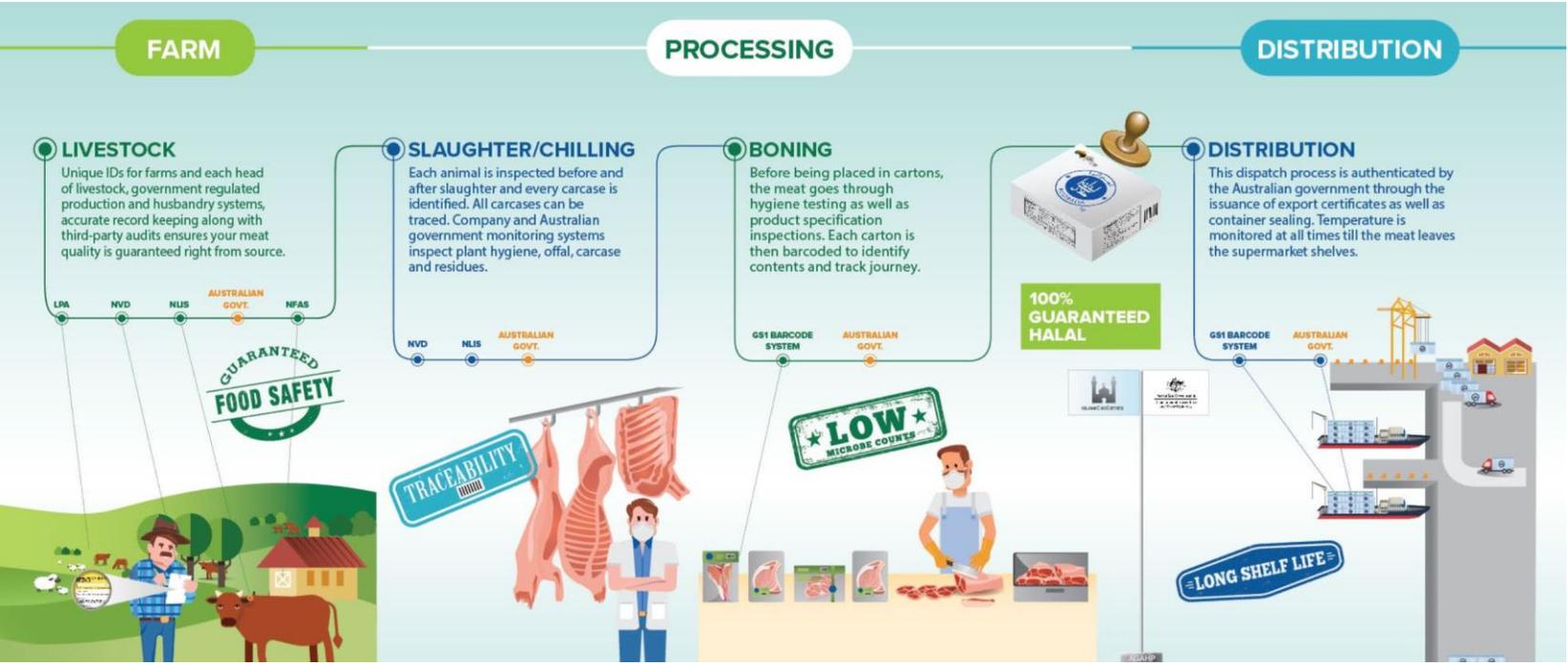
"I think if there's some sort of virus going on like swine flu, then traceability is quite important. When there is no disease around, it's not"

(Younger, Singapore)

"I think traceability is good because there's transparency. We also trust it as we will know where it comes from, whether it's a reputable source. And sometimes they make claims whether it's grass fed or organic, so you can also know whether it's true or not. It's good to know, good to have"

(Younger, Singapore)

Singaporean consumers have a low awareness of the term “traceability”, but they understand the AU Integrity System rigourously, which provides peace of mind and product assurance. However, it’s not seen as a real remedy but as historical accountability only



Consumers feel fully traceable red meat products offer:

- ✓ Enhance Trust
- ✓ Consistency of high-quality
- ✓ Peace of mind
- ✓ Transparency of info

All livestock are identified by an ear tag

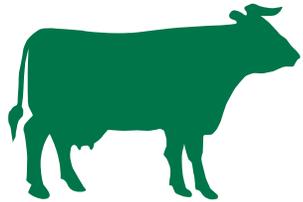
The LPA NVD captures food safety information on every animal, every time it moves from property to property, to processors or saleyards

Every movement is recorded in a central database

Ensuring both safety and quality for Australian red meat

"I think that is good because there's transparency. We also can build the trust, that we will know where it comes from, whether it's a reputable source. And sometimes they make claims whether it's grass fed or organic, you can also know whether it's true or not. It's good to know, good to have" (Younger, Singapore)

High usage without incidents gives rise to more positive perceptions and word-of-mouth. Japanese cuisine stalls and restaurants are ubiquitous in Singapore but Australian food establishments are rare.



Singaporean consumer's imported Beef ranking – Top 3 Factors

LOWER

HIGHER



QUALITY



TRUST



FOOD SAFETY



Aussie beef is...

JP beef is the most tasty and palatable; NZ is natural & fresh. AU is slightly behind these 2.

Trust for AU beef is higher than NZ, because of more exposure to Aussie beef

Similar to trust, food safety standards are high but seen as lagging somewhat behind Japan and NZ

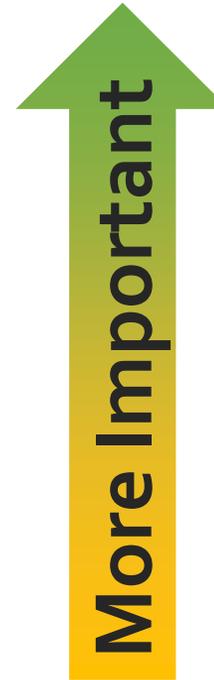
Source: 2024 MLA research into consumer purchase decision drivers for imported red meat in South-East Asia, conducted under the DAFF grant “Building Trust in Australian Agricultural Traceability and Credentials in Southeast Asia”

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



Lamb is consumed on special occasions. The cut is most important, driven by the dish requirements.

Quality is relevant for optimum enjoyment and satisfaction



- 1 Cut of meat
- 2 Quality
- 3 Freshness



Australian Beef and Lamb are very trustworthy. Australian Lamb is known to be of good quality, with some branded and premium variants available in high end butchers and restaurants



For more information:

Valeska Valeska

MLA, Regional Manager Southern Asia

Email: vvaleska@mla.com.au

Emiliano Diaz

MLA, Market Insight Analyst South-East Asia

Email: ediaz@mla.com.au

For more resources:

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



[Aussie Meat
Trade Hub](#)



© May 2025 Meat & Livestock Australia Limited ABN 39 081 678 364. All rights are expressly reserved. Requests for further authorisation should be directed to info@mla.com.au. **Disclaimer:** Care has been taken to ensure the accuracy of the information contained in this publication. However, MLA, MDC and ISC ("MLA Group") do not accept responsibility for the accuracy, currency or completeness of the information or opinions contained in this publication. This publication is intended to provide general information only and it has been prepared without taking into account your specific circumstances, objectives, or needs. Any forward looking statements made within this publication are not guarantees of future performance or results, and performance or results may vary from those expressed in, or implied by, any forward-looking statements. No representation, warranty or other assurance is given as to the fairness, accuracy, completeness, likelihood of achievement or reasonableness of forward-looking statements or related assumptions contained in the publication. You should make your own enquiries before making decisions concerning your interests. Your use of, or reliance on, any content is entirely at your own risk and the MLA Group accepts no liability for any losses or damages incurred by you as a result of that use or reliance.

