

## **Guideline for expert interviews in South Korea: Researcher on meat market**

### **1. Identification of domestic meat market trends and relevance of imported meat products**

- Please describe current trends on the South Korean meat market with regard to the individual meat types and alternative protein sources (e.g., fish or plant-based meat products)?
- Could you please describe the relevance of imported meat in this regard?
- With regard to individual imported meat products, could please mention the most relevant cuts?

### **2. Marketing channels and quality aspects of demanded meat products**

- When you think of meat, which quality criteria are most important (e.g., marbling, meat condition, animal welfare, color, country of origin, packaging)?
- Thus, what do you associate with good or bad meat quality?
- With regard to German meat, could you please describe how would you rate the meat quality?
- Are there any meat quality classification systems that are relevant for the South Korean meat market? If this is the case, what are the underlying criteria for this quality classification system?

### **3. Animal welfare as a quality criterion for meat**

- Are you aware of the concept of “animal welfare”?
- Could you describe what you associate with animal friendly husbandry systems?
- Is that a relevant topic for South Korean consumers, producers, politicians?
  - Why is it relevant or why is it not relevant?
  - Could individual market players be persuaded by animal welfare as a quality criterion for meat in the future?
  - Are there individual interest groups that are likely to be difficult to convince of the importance of animal welfare?
  - Do you think there might be a market potential for meat produced under higher animal welfare standards in South Korea in the future?
  - Is there a specific market potential for German pork produced under higher animal welfare standards?

### **4. Future consumer demands**

- From your point of view, what will be the future drivers of meat consumption in South Korea? (e.g., income, health, environmental effects, animal welfare)
- Is meat consumption already questioned against the background of external effects (e.g., carbon footprint, animal welfare, health issues)?
- Is there already a demand for meat substitutes/plant-based meat products or even cultured meat?

## **Guideline for expert interviews in South Korea: Meat trading companies**

### **1. Identification of domestic meat market trends and relevance of imported meat products**

- Please describe current trends on the South Korean meat market with regard to the individual meat types and alternative protein sources (e.g., fish or plant-based meat products)?
- Could you please describe the relevance of imported meat in this regard?
- With regard to individual imported meat products, could please mention the most relevant cuts for your company?
- Could you please describe your most important trading partners (foreign countries) in this regard?
- How do you perceive Germany as a trading partner?

### **2. Marketing channels and quality aspects of demanded meat products**

- What are the main marketing channels for meat for your specific company (e.g., processing, wholesale, retail, gastronomy)?
- With regard to those marketing channels, could you describe different customer preferences?
- When you think of meat, which quality criteria are most important for you as trading company (e.g., marbling, meat condition, animal welfare, color, country of origin, packaging)?
- Thus, what do you associate with good or bad meat quality?
- Are there any meat quality classification systems that are relevant for the South Korean meat market? If this is the case, what are the underlying criteria for this quality classification system?

### **3. Animal welfare as a quality criterion for meat**

- Are you aware of the concept of “animal welfare”?
- Could you describe what you associate with animal friendly husbandry systems?
  - Does your company already use a specific definition of animal welfare?
- Is that a relevant topic for South Korean consumers, producers, politicians?
  - Why is it relevant or why is it not relevant?
  - Could individual market players be persuaded by animal welfare as a quality criterion for meat in the future?
  - Are there individual interest groups that are likely to be difficult to convince of the importance of animal welfare?
- Does your company import pork produced under improved animal welfare standards?
  - If this is the case, is there price difference compared to conventionally produced pork?
  - If this is not the case, do you think there might be a market potential for meat produced under higher animal welfare standards in South Korea in the future?
- From your perspective, is there a specific market potential for German pork produced under higher animal welfare standards?
  - Under what conditions would you import German pork produced under higher animal welfare standards?

### **4. Future consumer demands**

- From your point of view, what will be the future drivers of meat consumption in South Korea? (e.g., income, health, environmental effects, animal welfare)
- Is meat consumption already questioned against the background of external effects (e.g., carbon footprint, animal welfare, health issues)?
- Is there already a demand for meat substitutes/plant-based meat products or even cultured meat?

## **Guideline for expert interviews in South Korea: Experts on Consumer Research**

### **5. Identification of domestic meat market trends and relevance of imported meat products**

- Please describe current trends on the South Korean meat market with regard to the individual meat types and alternative protein sources (e.g., fish or plant-based meat products) that are available in retail stores or traditional meat markets?
- Could you please describe the relevance of imported meat in this regard?
- Do consumers recognize the origin of meat while purchasing?

### **6. Marketing channels and quality aspects of demanded meat products**

- From your perspective, what are the most important shopping locations for South Korean consumers when it comes to meat purchases?
- Which quality criteria are most important for the consumers (e.g., marbling, meat condition, animal welfare, color, country of origin, packaging)?
- In your opinion, what do consumers associate with good or bad meat quality?
- Are there any meat labelling schemes that exist on the South Korean market in terms of meat? If this is the case, what are the underlying criteria for these labels?

### **7. Animal welfare as a quality criterion for meat**

- Are South Korean consumers aware of the concept of “animal welfare”?
- Could you describe what consumers associate with animal friendly husbandry systems?
- Is that a relevant topic for South Korean consumers, producers, politicians?
  - Why is it relevant or why is it not relevant?
  - Could consumers be persuaded by animal welfare as a quality criterion for meat in the future?
  - Are there individual consumer groups that are likely to be difficult to convince of the importance of animal welfare?
- Do consumers demand meat produced under higher animal welfare standards?
- Is there a price difference compared to conventionally produced pork?
  - Is there a specific market potential for German pork produced under higher animal welfare standards?

### **8. Future consumer demands**

- From your point of view, what will be the future drivers of meat consumption in South Korea? (e.g., income, health, environmental effects, animal welfare)
- Is meat consumption already questioned against the background of external effects (e.g., carbon footprint, animal welfare, health issues)?
- Is there already a demand for meat substitutes/plant based meat products or even cultured meat?

## **Guideline for expert interviews in South Korea: Processing company**

### **1. Identification of domestic meat market trends and relevance of imported meat products**

- Please describe current trends on the South Korean meat market with regard to individual meat products?
- Which are main meat suppliers (e.g., domestic slaughterhouses, foreign trading companies)?
- Could you please describe the relevance of imported meat in this regard?
- Please mention the most relevant cuts for processing that your company uses (please differentiate between imported and domestic meat)?
- How would you perceive Germany as a meat supplier?

### **2. Marketing channels and quality aspects of demanded meat products**

- What are your companies main marketing channels for meat products (e.g., processing, wholesale, retail, gastronomy)?
- With regard to those marketing channels, could you describe different customer preferences?
- When you think of the meat that your company market which quality criteria are most important (e.g., marbling, meat condition, animal welfare, color, country of origin, packaging)?
- Thus, what does your company associate with good or bad meat quality?
- Are there any meat quality classification systems that are relevant for the South Korean meat market? If this is the case, what are the underlying criteria for this quality classification system?

### **3. Animal welfare as a quality criterion for meat**

- Are you aware of the concept of “animal welfare”?
- Could you describe what you associate with animal friendly husbandry systems?
- Is that a relevant topic for South Korean consumers, producers, politicians?
  - Why is it relevant or why is it not relevant?
- Is your company importing or processing pork produced under improved animal welfare standards?
  - If this is not the case, do you think there might be a market potential for meat produced under higher animal welfare standards in South Korea in the future?
  - Under what conditions would your company import German pork produced under higher animal welfare standards?

### **4. Future consumer demands**

- From your point of view, what will be the future drivers of meat consumption in South Korea? (e.g., income, health, environmental effects, animal welfare)
- Is meat consumption already questioned against the background of external effects (e.g., carbon footprint, animal welfare, health issues)?
- Is there already a demand for meat substitutes/plant-based meat products or even cultured meat?