

Agri-food Safety Policies in Response to Changes in the Food Market in the Post COVID19 Era

2023 FANEA



The state of contactless foodservice transactions in the post-COVID-19 era



Food safety issues for meal delivery services



Safety management systems and policies for food delivery services



Perceptions of health and safety management practices and systems at delivery restaurants



Food Delivery Service Safety Management Challenges in the Post-COVID-19 Era

Expanding the Online Market In The Agri-food industry



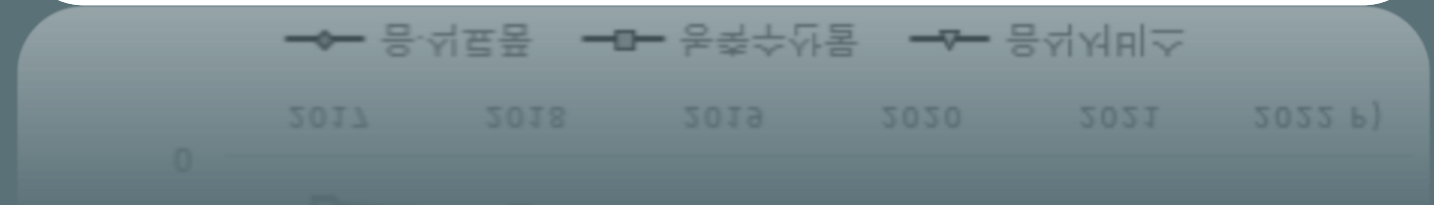
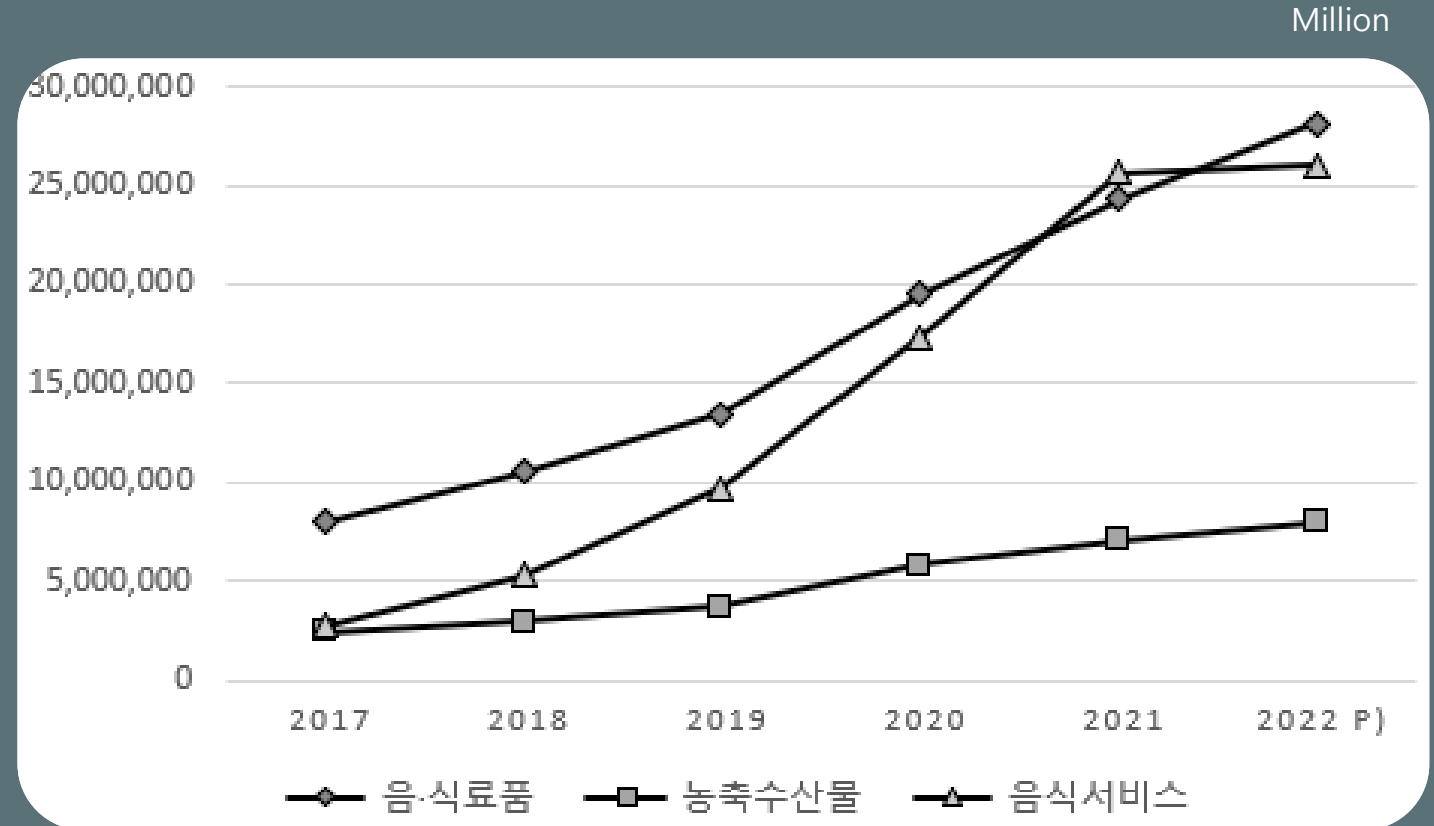
The size of the agri-food industry's online marketplace

South Korea's online market is expected to grow at a CAGR of 17.4% from 2017 to 2022, reaching KRW 209 trillion by 2022.

Agri-food (food + agricultural products + food service) market size is

KRW 63 trillion (about 30% of the total)

Growing faster than the overall online market with a compound annual growth rate of 36.7 percent

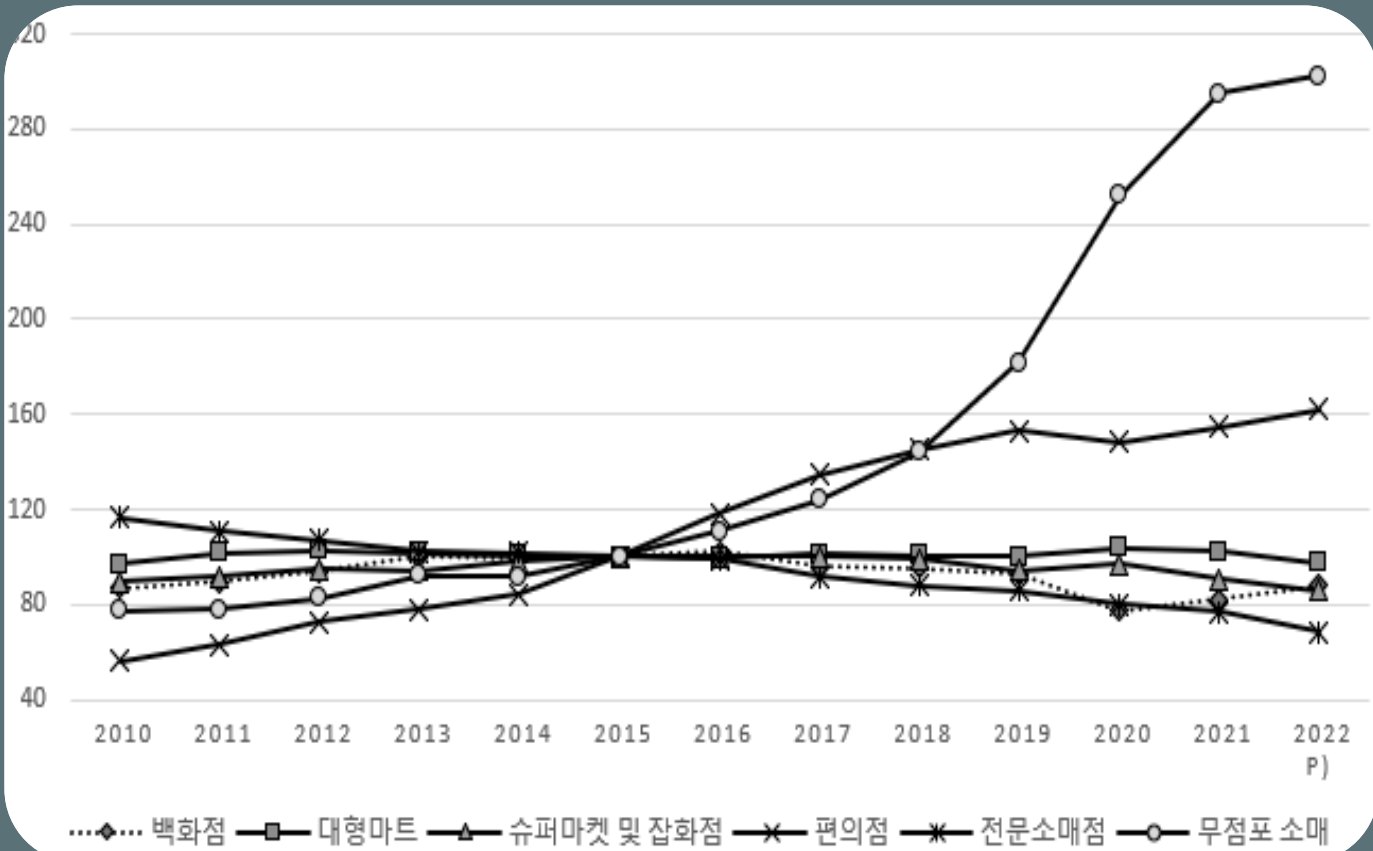


Food and Grocery Retail Sales Index by Industry

Grocery sales index for **storeless retail**, including online transactions, steadily rises
Especially after Covid-19

Raising food safety concerns around contactless services

2015=100



Consumer safety by food contactless service sector

Online early morning delivery of fresh produce (62%)

> Dine-in and take-out food (43%) >

Restaurant serving and cooking

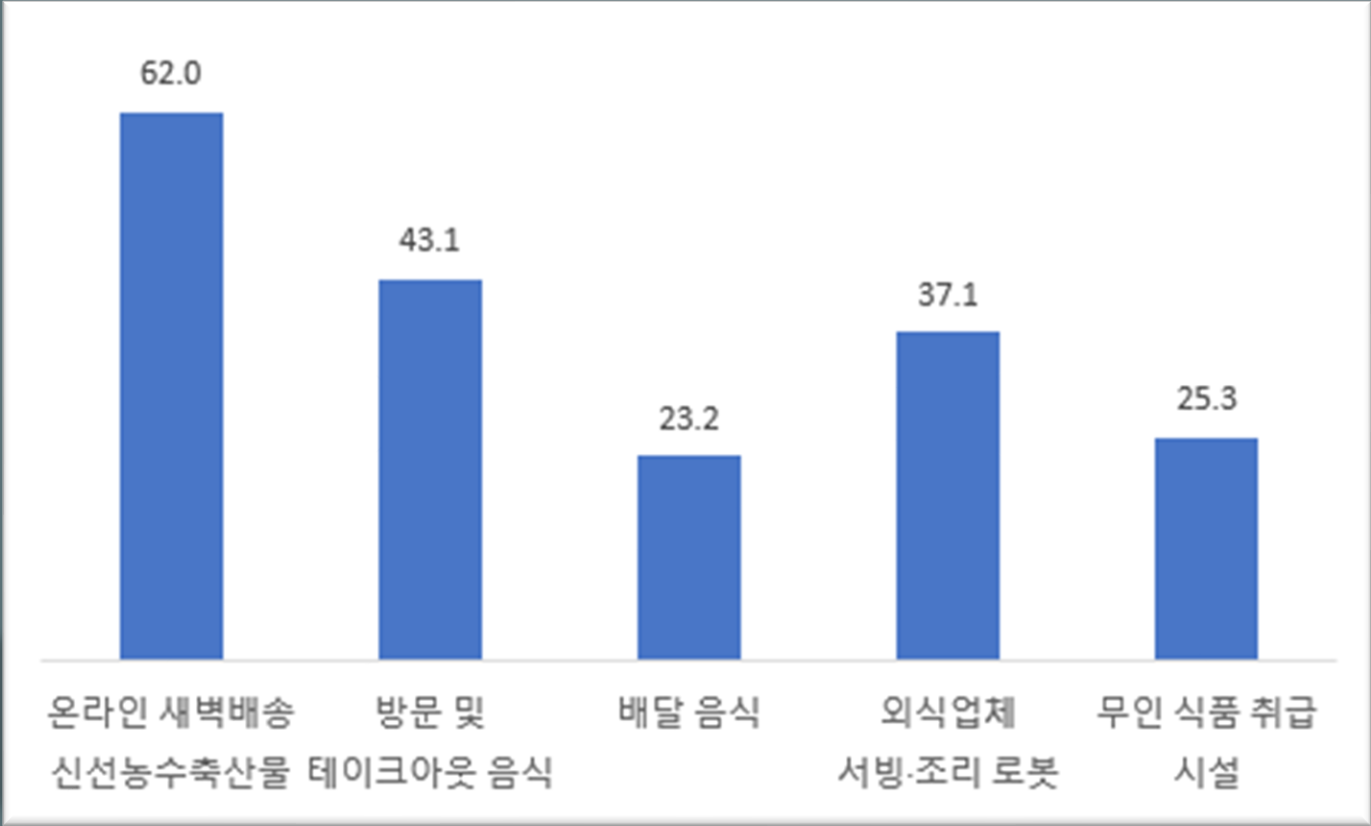
robots (37%) > Unmanned food

handling facilities (25%) > Delivery (23%)

Focus on Meal Delivery

The state of contactless service transactions in the post-COVID-19 era

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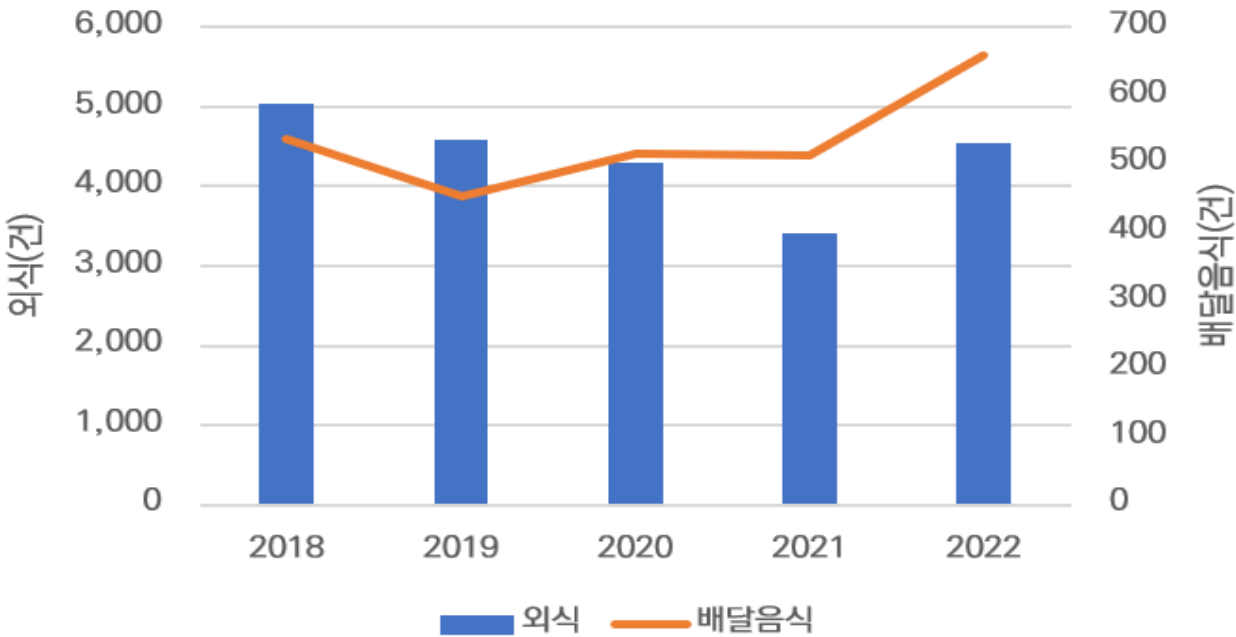
Eating out decreased due to COVID-19 in 2020-2021.

Fewer foodborne illness reports.

The number of reports of foodborne illnesses has increased over the same period due to the trend toward contactless services.

536('18)→452('19) →514('20)
→512('21) →660('22)

Korea Consumer Agency Consumer Welfare Monitoring System
Number of reports on eating out and delivery food



Safety inspections and enforcement

Status of the Food and Drug Administration's inspection of delivery restaurants in 2023

Check Name	Inspection period	Lead Organization (Participating Organization)	Lead department (participating department)
Delivery restaurant inspection	2/6-2/10 (5 days)	Local governments (municipalities)	Food Control Division
2 nd delivery restaurant inspection	5/29-6/2 (5 days)	Municipalities	Food Control Division
3 rd delivery restaurant inspection	8/7-8/11 (5 days)	Municipalities	Food Control Division
4 th delivery restaurant inspection	11/6-11/10 (5 days)	Municipalities	Food Control Division

Delivery app notification system for foreign object

Notify the Commissioner of Ministry of Food and Drug Safety if you receive a report of a foreign object found by a consumer
Take a picture of the food and the foreign object → Place the foreign object in a ziplock bag or airtight container → Call the delivery app company or KFDA 1339.

Marking and authentication

Drafting	Contents
Search restaurant administrative penalty history	Connect government data to delivery apps to see a restaurant's enforcement history when a consumer orders food from a delivery app.
Display a restaurant's sanitation rating	For restaurants that have been certified through the Restaurant Sanitation Rating System, display the Restaurant Sanitation Rating designation in your delivery app so that customers can see the level of hygiene when ordering food.

Delivery app restaurant sanitation rating display	Restaurant Sanitation Rating System
<div><div>식약처 인증</div><div>위생등급 매우 우수 ★★★ 2023.08.07 ~ 2025.08.06 식품의약품안전처에서 가게의 위생관련 사항을 평가하고 위생등급 매우 우수를 부여했습니다.</div></div>	<div><div>HYGIENE GRADE CERTIFICATE 음식점 위생등급 매우 우수 EXCELLENT</div><div>HYGIENE GRADE CERTIFICATE 음식점 위생등급 우수 VERY GOOD</div><div>HYGIENE GRADE CERTIFICATE 음식점 위생등급 좋음 GOOD</div></div>

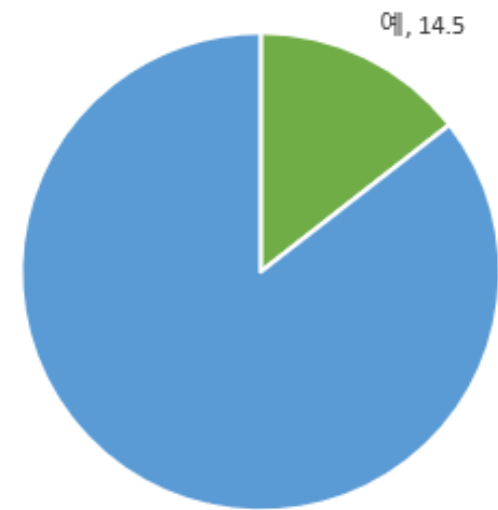
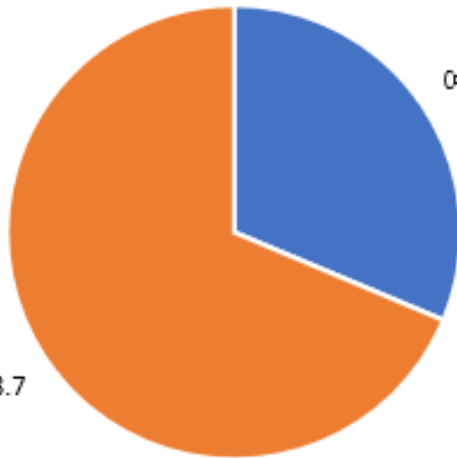

Recognition status of
Restaurant sanitation labeling and delivery food hygiene manuals.

%



Recognition of the delivery app related system

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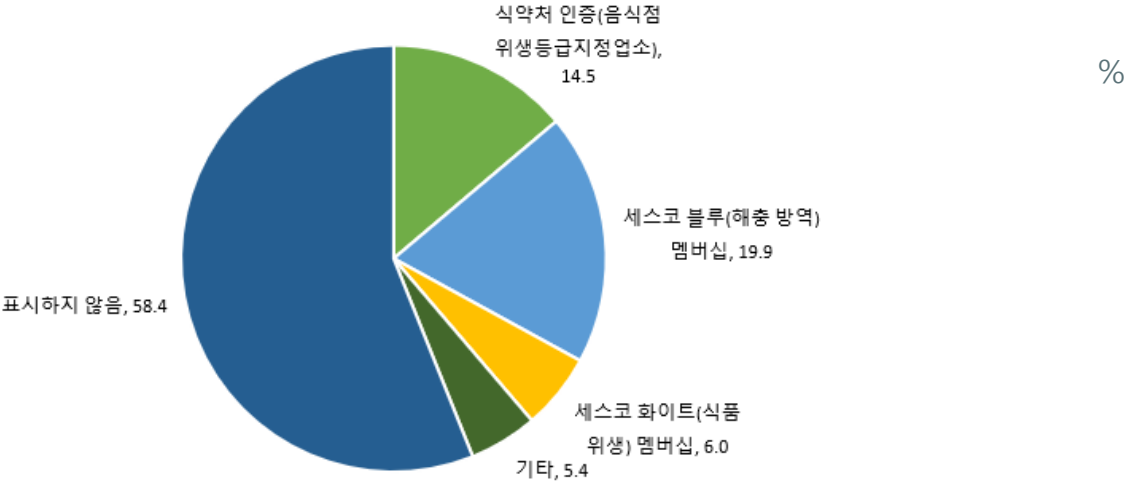
Delivery app company notification system	Search restaurant administrative disposition history	Displaying a restaurant's sanitation rating																		
 <table><tr><th>Response</th><th>Percentage</th></tr><tr><td>아니오 (No)</td><td>85.5</td></tr><tr><td>예 (Yes)</td><td>14.5</td></tr></table>	Response	Percentage	아니오 (No)	85.5	예 (Yes)	14.5	 <table><tr><th>Response</th><th>Percentage</th></tr><tr><td>아니요 (No)</td><td>68.7</td></tr><tr><td>예 (Yes)</td><td>31.3</td></tr></table>	Response	Percentage	아니요 (No)	68.7	예 (Yes)	31.3	 <table><tr><th>Response</th><th>Percentage</th></tr><tr><td>예 (Yes)</td><td>57.8</td></tr><tr><td>아니요 (No)</td><td>42.2</td></tr></table>	Response	Percentage	예 (Yes)	57.8	아니요 (No)	42.2
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Restaurant Delivery App Hygiene information display status

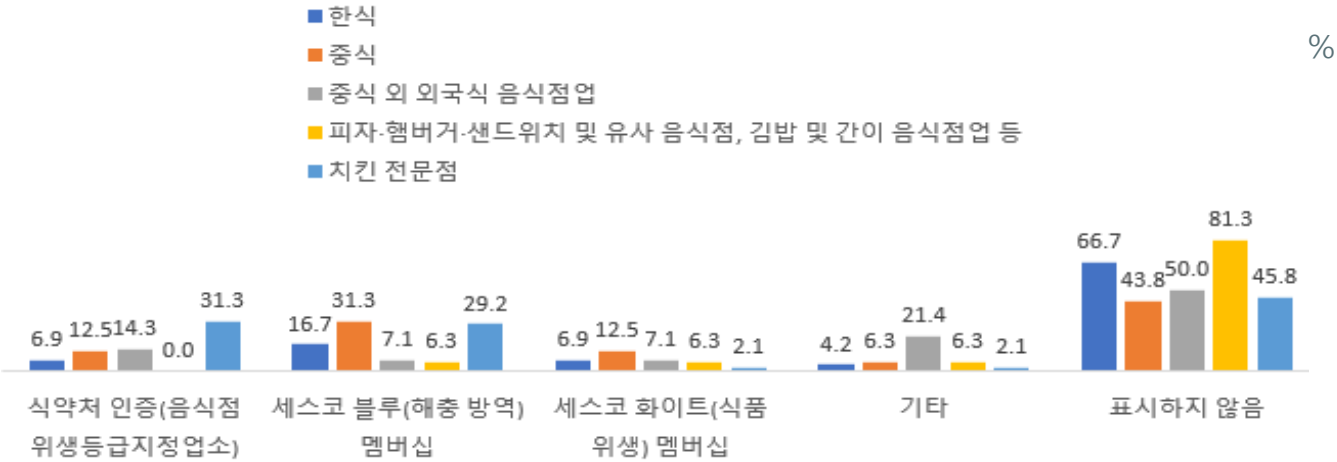
Reasons for displaying Cesco membership on the delivery app

'Consumers will trust it the most' >
'It has good hygiene and safety
management' > 'It maintains the
level of hygiene and safety certified
by the Ministry of Food and Drug
Safety'

Display hygiene information for delivery apps



Show delivery app hygiene information by industry



Food Delivery in the Post-Corona Era Safety Management Challenges



Increase outreach about the manual and enforcement system provided by the Ministry of Food and Drug Safety.



Take steps to activate the Sanitation Rating System

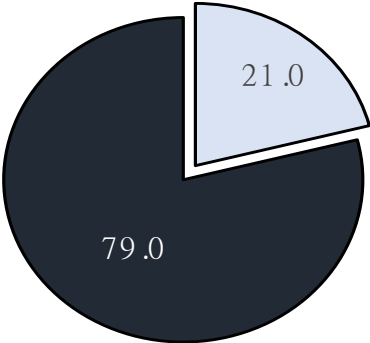
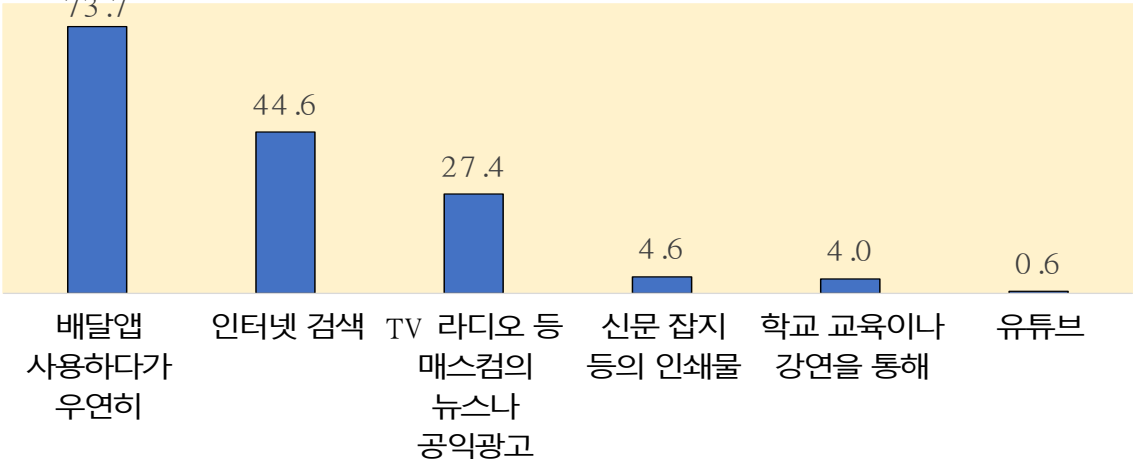


Provide hygiene training and guidance to delivery workers

Increase outreach about the manual and enforcement system provided by the MFDS

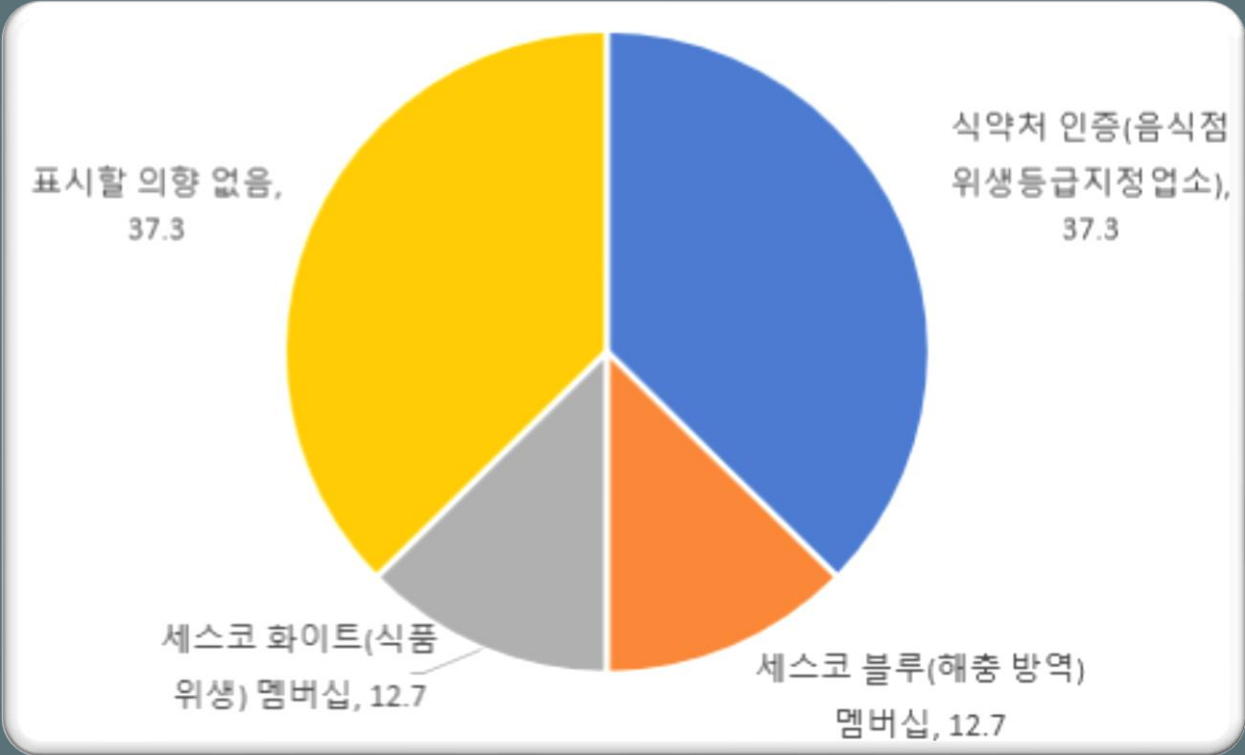
Whether a delivery restaurant in a delivery app is registered for business, history of food hygiene law violations, awareness of hygiene rating system information, and how to acquire it

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Whether the delivery app is registered to operate a delivery restaurant, has a history of food hygiene law violations, and is aware of the hygiene rating system.	Whether the delivery app is registered as a restaurant business, History of food hygiene law violations and how to get information on the hygiene rating system																				
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Restaurants' willingness
to display
hygiene information on
delivery apps in the future

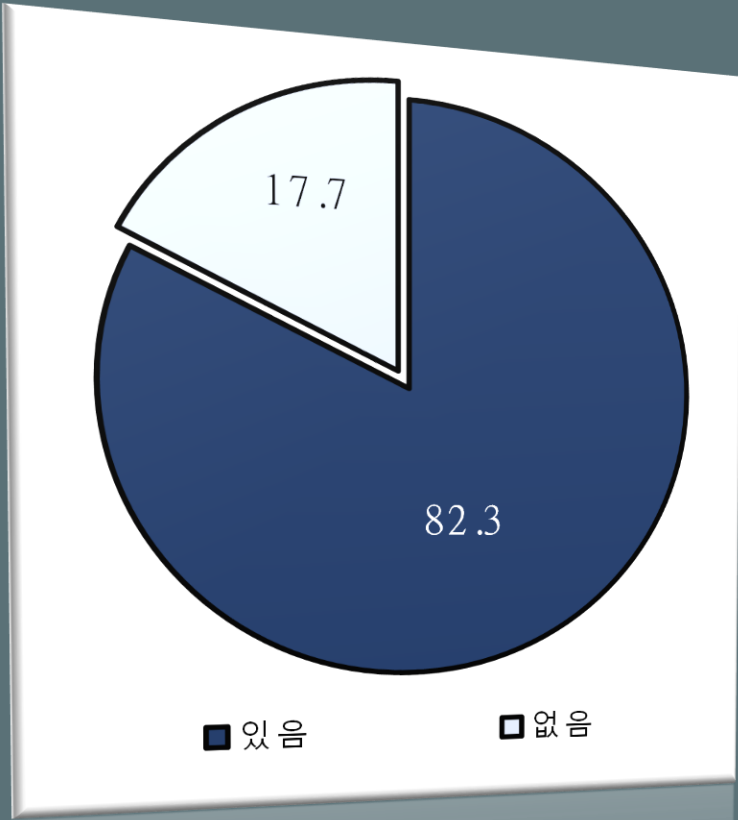
MFDS approved, not willing to label (37%)
> Cesco Membership (25%)



Willingness to use
Delivery app notification
system for foreign object
in the future

Recognition ratio 9%

82% Intent to use



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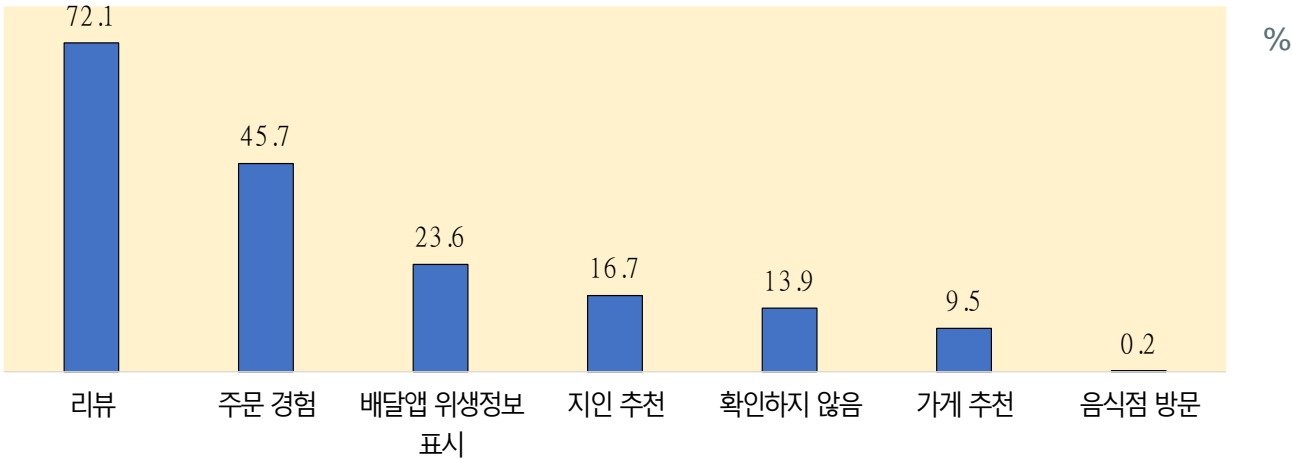
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Take steps to activate the Sanitation Rating System

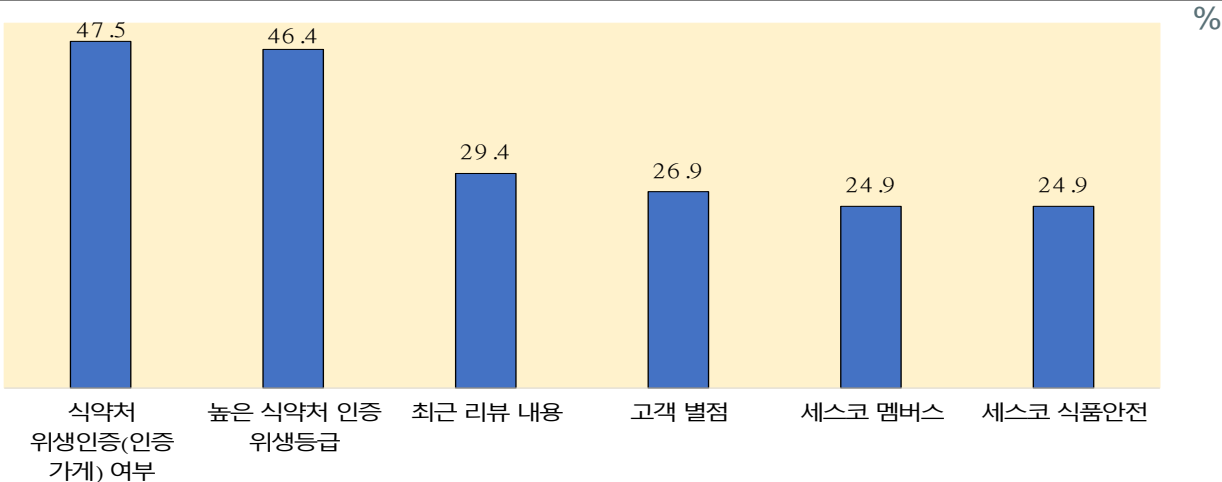
How consumers check restaurant hygiene on delivery apps: "Reviews" (72%) > "Ordering experience" (46%) > "Delivery apps display hygiene information" (24%)

However, the most important information for checking the hygiene of a restaurant is 'Ministry of Food and Drug Safety hygiene certification' 46~48%.

How to check restaurant hygiene in delivery apps



What information is most important to you when checking restaurant health information in delivery apps?

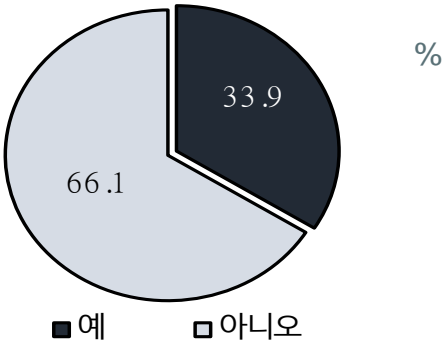


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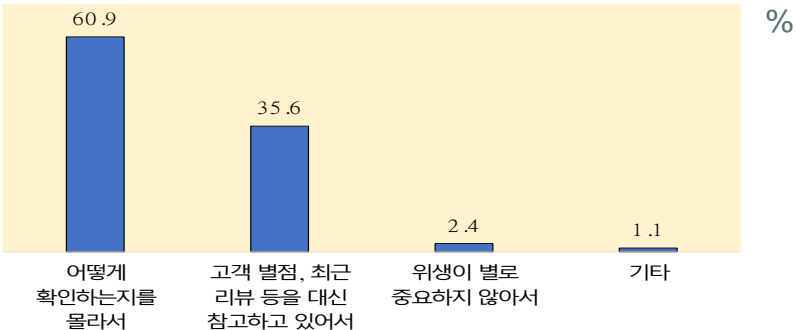
34% use hygiene rating information for restaurants certified by the Ministry of Food and Drug Safety when ordering from delivery apps

Reasons for not using restaurant hygiene ratings 61% "I don't know how to check

Availability of hygiene rating information for restaurants certified by the Ministry of Food and Drug Safety when ordering food in delivery apps



Why don't delivery apps use MFDS-certified restaurant hygiene ratings to order food?



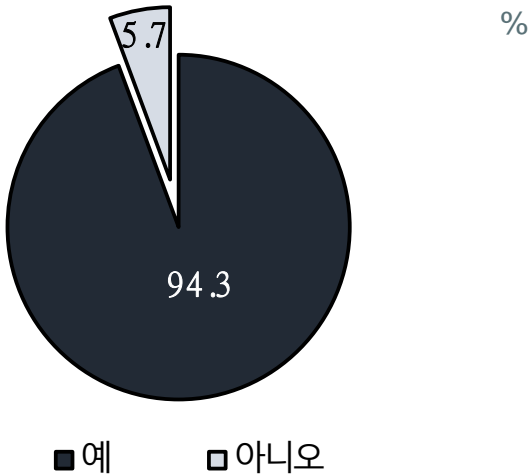
Take steps to activate the Sanitation Rating System

94% of consumers are likely to check restaurant sanitation information in delivery apps in the future

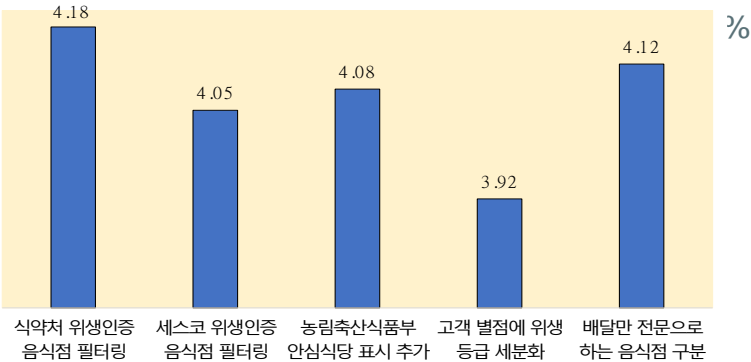
Need to introduce a delivery app with the functions of 'filtering restaurants certified by the Ministry of Food and Drug Safety' and 'distinguishing restaurants that specialize in delivery only'

UK case study

Willingness to check restaurant sanitation information in delivery apps in the future



Degree of need for introduction of restaurant hygiene information improvement system within delivery app

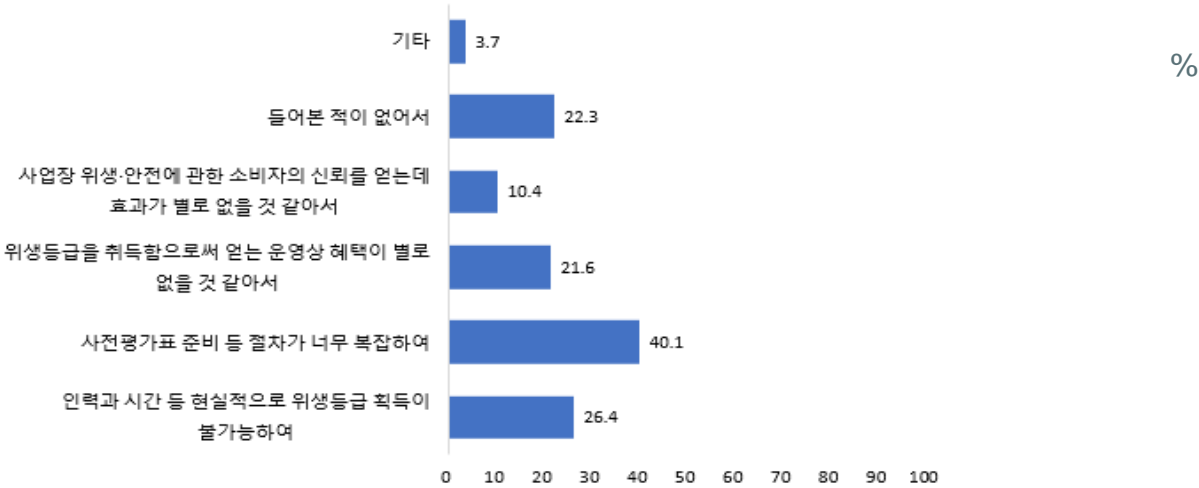


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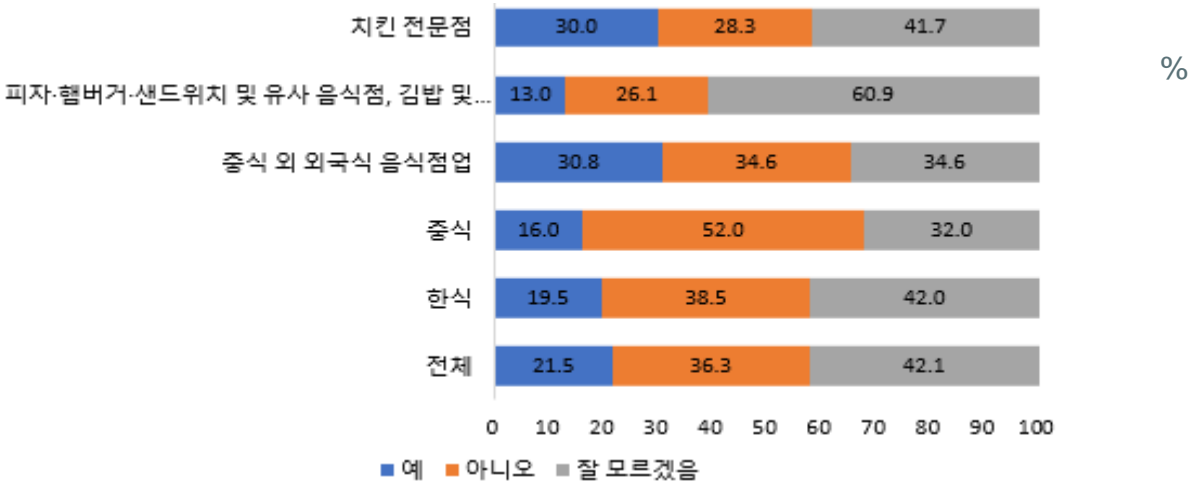
Restaurateurs refuse to apply because "the process is too complicated, such as preparing a pre-assessment sheet" (40%), "it is not practical to obtain a hygiene rating due to labor and time" (26%), and "never heard of it" (22%).

Intent to apply in the future is low at 13-31%.

Why restaurants don't apply for a sanitation rating

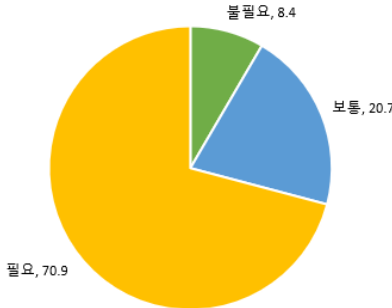
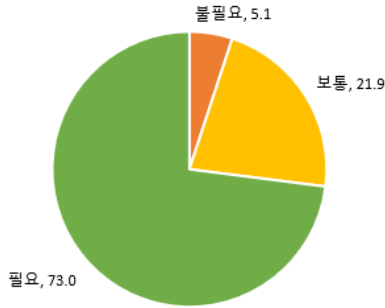
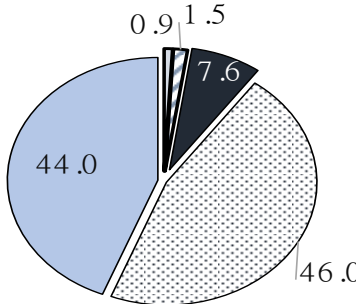
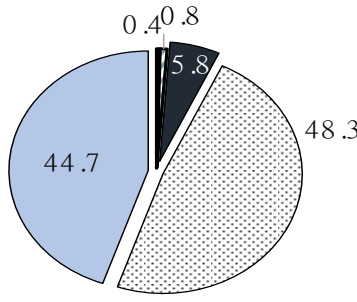


Intent to apply/renew for a future restaurant sanitation rating



Need to provide hygiene training and guidance for delivery workers

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Recognizing the need for health and safety training for restaurants	Recognizing the need for health and safety guidelines for restaurants										
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