



Consumer-Based Insights for Indonesian Market Entry Strategy Development of South Korean Food Manufacturing Companies

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Abstract. *The interest for Korean food products in Indonesia is growing at a rapid pace. Korean Wave has popularized various aspects of Korean culture in Indonesia, including Korean food. The popularity of Korean food products in Indonesia provides opportunities for South Korean food manufacturing companies that want to enter the Indonesian market. South Korean food manufacturing companies who want to succeed in doing business in Indonesia need to understand the factors that affect Indonesian consumers' purchase interest of Korean food and insights around market entry strategies that work in Indonesia. This study conducted a literature review and found that there are various factors that affect Indonesian consumers' purchase interest of Korean food. These factors will be discussed in this study. Based on those factors, this study will develop suggestions and insights that can be used by South Korean food manufacturing companies to develop market entry strategies to enter the Indonesian market.*

Keywords: *Indonesia, Korean Food, Market Entry*

INTRODUCTION

Korean Wave (*Hallyu*) has popularized Korean Culture globally, including in Indonesia. Indonesians have grown accustomed to Korean Pop (K-Pop), Korean Drama (K-Drama), and Korean Food (K-Food). Amongst these three popular parts of Korean Culture, K-Food experienced notable popularity growth in Indonesia, especially among the younger generation. Strategic marketing communication and product adaptation to local preferences has enabled the development of the market for K-Food products in the Indonesian. Furthermore, K-food influencers and South Korean government's culinary diplomacy activities enabled further expansion of K-Food market in Indonesia (Asy'ari et al., 2024).

According to Korea Agro-Fisheries & Food Trade Corporation, Indonesia has imported USD 236 million worth of food from South Korea between January – September 2024, which is a 2,7% increase compared to the same period in the previous year (Sekarwati, 2024). The import value of Korean snacks in Indonesia increased at 18.4% in the 2018 – 2022 period (Ultha, 2024). In general, exports of South Korean food products to Indonesia continue to grow annually (Hanifah & Rosdiana, 2024). This shows that K-Food in Indonesia is gaining traction.

Food manufacturing companies from South Korea have the opportunity to export more of their products to Indonesia since Indonesia imported a substantial amount of food from foreign countries. The percentage of food imports in 2022 was 11.02% of all merchandise imports (Trading Economics, n.d.). The estimate for Indonesia's imported processed food market size is quite high, estimated at US\$19.4 billion in 2024 (Swiss Business Hub Southeast Asia + Pacific, 2024).

The value of the Food Market in Indonesia is very large. The amount of revenue in the Indonesian food market is predicted to reach US\$250.10 billion in 2024 and expected to grow

annually by 6.03% (Statista, n.d.). This fact makes it possible for further market expansion of Korean food products in Indonesia. This means that South Korean food manufacturing companies that choose to enter the Indonesian market through licensing, joint venture, or opening a subsidiary have the potential to reap substantial amount of revenue.

In order to gain substantial market share in the Indonesian market, South Korean food manufacturing companies need to understand the insights about Indonesian consumers and about market entry strategies that work in Indonesia. One of the most important way to understand the Indonesian consumer is by focusing on the factors that affect their purchase intentions. This study will provide a literature study on the factors that affect Indonesian consumers' purchase intentions of Korean food. Furthermore, this study will provide insights based on those factors that can be used by Korean food manufacturing companies in developing their market in Indonesia.

METHODOLOGY

This study uses literature review method. Google Scholar is used as the source for finding the relevant literatures. The focus of the literature review is to find the factors that affect consumers' purchase intentions of Korean food in Indonesia. The literatures that are selected for determining those factors fulfills the following specifications: published between 2021 – 2024; contained results on consumers' purchase intention of Korean food in Indonesia; the sample of the research are consumers living in Indonesia. These specifications were used to make sure that each of the research papers selected for the literature review is up to date and reflect Indonesian context.

RESULTS AND DISCUSSION

The literature review focused on reviewing past research literatures that provide research results regarding the factors that affect consumers' purchase intentions of Korean food in Indonesia. The results of the literature review can be seen in Table 1.

Table 1. Factors that Affect Indonesian Consumers' Purchase Intention of Korean Food Products

Category	Factor	Literature Source
Halal & Religiosity-related Factors	Halal Label	(Ermawati, 2023) (Muhammad et al., 2023) (Septianti et al., 2021) (Zahra et al., 2023) (A. Mustika et al., 2021) (I. Mustika & L, 2024) (Arifin et al., 2024)
	Halal Awareness	(Ermawati, 2023) (Muhammad et al., 2023) (Zahra et al., 2023) (Ramadhani, Widyaningrum, Setiawan, et al., 2023) (Firdaus et al., 2022) (Astuti & Asih, 2021)

Country-related Factors	Halal Marketing	(Arifin et al., 2024)
	Religiosity	(Firdaus et al., 2022) (Astuti & Asih, 2021)
	Country of Origin	(Adriana et al., 2023)
	Country Image	(Puspita et al., 2022)
	Korean Wave	(Lestyanto et al., 2024)
Brand-related Factors	Brand Image	(Septianti et al., 2021)
	Brand Awareness	(Poluan, 2022)
	Brand Attitude	(Poluan, 2022)

1. Halal and Religiosity-related Factors

Indonesia is a Muslim majority country. In 2024, 245 million Indonesians identified themselves as Muslim which accounts about 87% of the population (Muslimah, 2024). As in any Muslim majority country, Halal and Religiosity-related factors have an important role in influencing consumers' intention in purchasing food products, especially imported food products.

Since October 2024, Halal label has become a requirement for all food products that are distributed and sold to the general public in Indonesia as a Halal product (Juwitasari, 2023). The existence of Halal label on the food packaging significantly affects the purchase intentions of Korean food products in Indonesian (Arifin et al., 2024; Ermawati, 2023; Muhammad et al., 2023; A. Mustika et al., 2021; I. Mustika & L, 2024; Septianti et al., 2021; Zahra et al., 2023).

Halal Awareness is the understanding what halal means, the processes and principles of halal, and the prioritization of halal food in consumption (Shahniah et al., 2024). Halal awareness significantly affects consumers' purchase intentions of Korean food products in Indonesia (Astuti & Asih, 2021; Ermawati, 2023; Firdaus et al., 2022; Muhammad et al., 2023; Ramadhani, Widyaningrum, Setiawan, et al., 2023; Zahra et al., 2023). The level of Halal awareness of Indonesian consumers is very high (Kurniawati & Savitri, 2020).

Halal marketing is a marketing concept that follows the rules of Halal (Islam & Chandrasekaran, 2013). Muslim consumers are more interested to products from companies that implement Halal marketing (Shamsudin & Rahman, 2014). Halal marketing is about communicating to the Muslim consumers that their products only contain Halal ingredients and have received Halal label from a Halal certification institution. In Indonesia, Halal marketing significantly affects consumers' purchase intentions of Korean food products (Arifin et al., 2024).

Religiosity can be defined as the identification and commitment to the religion's values and principles (Utama et al., 2024). Indonesia is one of the most religious countries in the world (Iswara, 2020). A high level of religiosity means that religious followers have a strong commitment to follow the principles of their religion (Bukhari et al., 2019). The values and principles of religion have a profound effect on the everyday activities of Indonesians, including in food purchase activities. Studies have shown that Religiosity significantly affects consumers' purchase intentions of Korean food products in Indonesia (Astuti & Asih, 2021; Firdaus et al., 2022).

2. Country-related Factors

Country of origin can be defined as country of manufacturing, country of parts, country of design, or country of brand origin (Rashid et al., 2016). Consumers tend to have a perception regarding the quality of a product based on its country of origin (Adriana et al., 2023). Indonesians generally have a good perception on products that originated from South Korea. A study in 2019 shows that the majority of Indonesian are interested in buying Korean products (Lidwina, 2021). South Korea as Country of origin of Korean food products significantly affects consumers' purchase intentions of Korean food products in Indonesia (Adriana et al., 2023).

Country image is usually viewed by the consumers based on the country's economy, political stability, morality, international policies, workforce quality, and culture (Buhmann & Ingenhoff, 2015). Consumers also view country image based on whether the country is a developed country or a developing country. In terms of products, consumers tend to view products from a developed country to be less risky and of higher quality than products made in a developing country (Laroche et al., 2005). South Korea is a developed country (Yun-hyung, 2021). Furthermore, Indonesia and South Korea have good bilateral relations (Verico & Riefky, 2022). Therefore, the fact that Indonesians have a positive attitude towards South Korea as a country (Shin et al., 2024) is not surprising and it affects their purchase intention on Korean products. A study shows that Korean country image significantly affects consumers' purchase intentions of Korean food products in Indonesia (Puspita et al., 2022).

Korean Wave (*Hallyu*) is the expansion of South Korean culture which initially starts in East Asia and Southeast Asia and then continues to develop globally (Tania, 2019). Within the Korean Wave, there is Gastro Diplomacy, which is a subtle diplomacy with the goal of attracting global awareness through the promotion of its culinary prowess (Dewi et al., 2022). The Korean Wave has succeeded in popularizing Korean food in Indonesia. South Korean embassy, governmental agencies, and business associations are very active in promoting Korean food in Indonesia through various events (Lova & Setuningsih, 2021; Maqshuro, 2023; Yusup, 2023). A study shows that Korean Wave significantly affects consumers' purchase intentions of Korean food products in Indonesia (Lestyanto et al., 2024).

3. Brand-related Factors

Brand Image is the consumers' comprehensive perception of a brand that is generated the consumer's mind that contains cognitive, affective, and evaluative aspects (Lee et al., 2014). Korean food products have a positive brand image in the eyes of Indonesians. A study shows that Brand Image significantly affects consumers' purchase intentions of Korean food products in Indonesia (Septianti et al., 2021).

Brand Awareness is the probability of consumers in identifying a brand and its product category from situations relevant to that brand (Bergkvist & Taylor, 2022). Indonesians generally can identify Korean food products by seeing the Hangul characters on the packaging. A study shows that Brand Awareness significantly affects consumers' purchase intentions of Korean food products in Indonesia (Poluan, 2022).

Brand Attitude is the consumers' psychological and emotional propensity in the process of evaluating a brand (Kim et al., 2018). Korean food has generated more positive interest than negative interest in Indonesia (Subandi et al., 2022). A study shows that Brand Attitude significantly affects consumers' purchase intentions of Korean food products in Indonesia (Poluan, 2022).

4. Consumer-Based Insights and Suggestions for Market Entry Strategy Development

Food manufacturing companies from South Korea need to take into account the factors that affect consumers purchase intentions of K-Food in Indonesia in order to develop market entry strategy. The following paragraphs will discuss the steps that South Korean food manufacturing companies should take if they want to enter the Indonesian market.

The first step is to acquire Halal label. Muslim consumers in Indonesia generally prefer products with Halal label, especially imported products. Indonesian Muslim consumers tend to put more emphasis on the existence of Halal label on foreign products (Iriani, 2019). Foreign food products that do not have Halal label will most likely be ignored by Indonesian Muslim consumers. Korean food products that are already Halal certified will have an advantage because the demand for Halal-certified Korean food products is high in Indonesia (Ramadhani, Widyaningrum, Khofifa, et al., 2023).

In Indonesia, every food product has to be categorized as Halal or non-Halal. Every food product that is categorized as Halal needs to have Halal certification and the Halal certification label should be displayed on the product packaging. Non-Halal food product should include Non-Halal description on its packaging (Wicaksono, 2024). The enforcement of Halal regulations on food products is quite strict in Indonesia. In 2017, several brands of instant noodle products from South Korea were withdrawn from circulation because they contain Non-Halal ingredients but the packaging did not display Non-Halal information (Pusat Data dan Informasi Obat dan Makanan, 2017).

Getting an Indonesian Halal certification for South Korean food manufacturing companies that do not have previous business experience in Indonesia might be challenging. However, it is not an issue anymore because getting a Halal certification from an Indonesian Halal certification institution is no longer mandatory. In 2023, the Halal Product Assurance Organizing Agency (BPJPH) of the Ministry of Religious Affairs of Indonesia has signed a Mutual Recognition Agreement (MRA) with 37 Foreign Halal Institutions (LHLN), including Korean Halal certification institutions, such as Korea Muslim Federation and Korean Halal Authority (BPJPH, 2023). Indonesian authority will recognize Halal certifications from Foreign Halal Institutions that have signed the MRA. This means South Korean food manufacturing companies can get their Halal certification from Korean Halal certification institutions.

The second step is to decide the type of market entry strategy that will be used. The common modes of market entry strategy are exporting, contractual agreements (licensing, franchising), joint venture, and wholly owned subsidiary (company acquisition, greenfield investment) (Kotler et al., 2019; Lin & Ho, 2019). Factors that can be considered in deciding which market entry strategy are firm size, international experience, innovation factors, product characteristics, advertising intensity, exporting intensity, and host country industry factors (Lin & Ho, 2019).

If a foreign company has no previous experience doing business in Indonesia, it tends to choose export as a market entry strategy. This strategy provides an opportunity to test the suitability of its products in Indonesia before other market entry strategies. An example of a Korean food manufacturing company that use export as a market entry strategy into the Indonesian market is Nongshim. It cooperated with an Indonesian importer and distributor company to sell its instant noodle products in Indonesia (Sudarsono, 2023).

If a foreign company is certain that its product is suitable in Indonesia and the demand is high, the company can choose Licensing as a way of market entry. The example of Licensing case in Indonesia is the licensing of the production of Lays, Cheetos, and Doritos snacks to Indofood

Group by PepsiCo from the United States of America for three decades, which ended in 2021 (Agmasari, 2021). Franchising is also an option for market entry. This option is suitable for food service business but not for food manufacturing business. There are several food service company from South Korea that entered the Indonesian market through franchise, such as Pizza Maru and Bulgogi Brothers (Abidin, 2013; Rahmawati, 2019).

If a foreign company has determined that its product has a strong demand in Indonesia, has found a trusted Indonesian partner company, and has vast amount of capital, the company can choose joint venture as its market entry strategy. Usually, the joint venture company will produce the food products of the foreign company locally in Indonesia. In some cases, it may still import some of its products from the country of origin of the foreign company. The following are several examples of joint venture cases between Indonesian companies and foreign food manufacturing companies in Indonesia: a. Delfi Orion, a joint venture between Delfi Group and Orion Corp. from South Korea (Just Food, 2016); b. Calbee Wings, a joint venture between Wings Group and Calbee from Japan (Mardiansyah, 2023); c. Glico Wings, a joint venture between Wings Group and Ezaki Glico from Japan (FabIndonesia, 2024); d. Suntory Garuda, a joint venture between Garuda Food and Suntory from Japan (Megasari, 2011); e. Chateraise Indonesia Manufacturing, a joint venture between Gobel Group and Chateraise from Japan (Muchtar, 2022); f. Arla Indofood, a joint venture between Indofood Group and Arla from Denmark (Karlita, 2019).

If a foreign company has products that has a strong demand in Indonesia, has vast amount of capital, and has strong expertise and previous experience in doing business in Indonesia, the company can choose to establish a subsidiary company in Indonesia, whether by acquisition of an existing Indonesian company or by creating a new company. With this approach, the foreign company will have a strong presence in Indonesia and a firm control of its operations. The example of a South Korean company that established subsidiary companies in Indonesia and has food manufacturing divisions that produce Korean food products is Cheil Jedang Group (Faaiz, 2023).

The third step is to develop a marketing strategy for the Indonesian market. Regardless of the market entry strategy chosen, South Korean food manufacturing companies need to develop marketing strategies specifically catered for the Indonesian market. The development of a marketing strategy should incorporate commonly used marketing strategy frameworks, such as 7P (Product, Price, Place, Promotion, People, Process, Physical Evidence), 3C (Customers, Competitors, Company), Ansoff Matrix, Blue Ocean Strategy, Porter's Five Forces, Segmentation Targeting Positioning (STP), SWOT, BCG Matrix, PESTEL Analysis (Clark, 2024; Long, 2023; Meier, 2024). However, the most important thing to do is acquiring a thorough knowledge about the Indonesian market by taking into consideration the real life marketing cases that happened in Indonesia during the marketing strategy development process.

South Korean food manufacturing companies may want to develop and implement Halal marketing strategy to get a fair share of the Indonesian market, considering that the majority of Indonesians are Muslims. However, the implementation of that strategy needs sensitivity and caution. In 2019, there was a leaflet at one of the store of a South Korean bakery chain in Indonesia that told customers that the bakery chain was not willing to write religious celebration greetings of Non-Muslim faiths on top of the cake because such greetings were not in line with Islamic Sharia principles. That incident went viral in the internet and created a public outcry. The South Korean bakery chain suffered significant losses in the number of customers after that incident although the bakery chain management has eventually stated that the leaflet was made by a miscreant employee and was not an official company policy (Marison & Gabrillin, 2019). By

considering the fact that Indonesia is a multi-religious and multi-cultural country, the focus of companies in developing and implementing Halal Marketing Strategy should be in the creation of marketing communication messages that gives assurance to the Muslim consumers that their products are Halal products that have received Halal certifications, not in the creation of marketing communication messages that conveys the companies' compliance on religious rules that have no relevance to the Halalness of their products.

Brand development is an important part of marketing strategy development process. In the Brand development process, South Korean food manufacturing companies should strategically craft their Brand Message, wisely choose the Brand Ambassadors that they will use in their advertisements, and tactfully create advertisement materials that are religiously and culturally appropriate in the Indonesian context. This needs to be carefully orchestrated in order to get consumer buy-in and avoid backlash.

In crafting the Brand Message, South Korean food manufacturing companies should take into consideration the fact that many Indonesian food manufacturing companies have also produced Korean-style food products. South Korean food manufacturing companies need to develop Brand Messages that differentiate their food products from Korean-style food products made by Indonesian food manufacturing companies (Aprilyani, 2024; Ramdhani, 2024; Rezqiana, 2023). One of the advantage of an ethnic food product that is produced by a company that originated in a country where the ethnic food emerged is the authenticity of its flavor and ingredients. Flavor and ingredients authenticity should be integrated into the Brand Message. Brand Messages should also be aligned with the Korean Wave (*Hallyu*) which promotes Korean culture and lifestyle. However, the Brand Message should also be aligned with Indonesian culture and lifestyle in order to get buy-in. One of the way to do this is by incorporating up-to-date Indonesian slang and jargon words in Brand Messages while combining them with popular Korean words.

In choosing Brand Ambassadors, South Korean food manufacturing companies should understand what is in the mind of Indonesian consumers. The general factors that need to be taken into account when choosing brand ambassadors are relevance to the industry, social media influence and reach, authenticity and credibility, alignment with your brand values, and ability to engage and connect with the target audience (T-ROC Staff, 2023). But in Indonesian context, a suitable physical appearance is a very important factor. Indonesians tend to think that the ideal women have beautiful face and white fair skin, like Korean women (Putri et al., 2022). Men who have white skin and handsome facial features that mimics Korean men are also considered as ideal in Indonesia.

That is the reason why many Indonesian companies choose Korean celebrities as their products' Brand Ambassadors (Dinisari, 2024; Lestari, 2024; Yaman, 2023), such as Song Hye-kyo (Collagena liquid milk), Choi Si-won (Mie Sedaap Instant Noodles), NCT Dream (Lemonilo instant noodles), Lee Min-ho (Luwak White Coffee instant coffee sachet drink), Kim Soo-hyun (Y.O.U Skincare), Han So-hee (Somethinc Skincare), Song Joong-ki (Scarlett Skincare), EXO (Scarlett Skincare), TWICE (Scarlett Skincare), Blackpink (Tokopedia Marketplace, Shopee Marketplace), BTS (Tokopedia Marketplace), Hyun Bin (Lazada Marketplace), Park Seo-joon (Blibli Marketplace), Ji Chang-wook (Traveloka online travel app).

South Korean food manufacturing companies can choose an Indonesian celebrity, a Korean celebrity, or celebrity from other countries as their Brand Ambassador for their products in Indonesia as long as the celebrity has features and characteristics that are accepted by the company's target market in Indonesia. The popularity level of a celebrity is one of the key factors

in Brand Ambassador selection. To get an initial idea of which celebrities are currently popular, companies can look at: a. which celebrities starred in prime-time movies and drama shows in popular Indonesian television stations; b. which celebrities starred in the most watched movies and drama shows in Subscription Video-On-Demand (SVOD) streaming services that are popular in Indonesia; c. which celebrities are popular in online music streaming services; d. which celebrities have massive followers and views on social media platforms; e. which celebrities are frequently featured in the news. There are various ways to measure the popularity level of a celebrity that are more detailed and robust, but these methods normally involve complicated methodologies that are best left to advertising agencies and marketing consulting firms. It is best for companies to work with advertising agencies and marketing consulting firms in Brand Ambassador selection.

The selection process of Brand Ambassador should also incorporate a risk management strategy. There were many cases of scandals involving Brand Ambassadors that hurt the reputation of a brand. The following points can be used as a guideline in preparing a risk management strategy regarding Brand Ambassadors: a. personal background of potential brand ambassadors; b. gossips and controversies surrounding potential brand ambassadors; c. past, current, and future projects (movies/songs/events/activism) of potential brand ambassadors that might create controversy; d. past and current relationships of potential brand ambassadors that might create controversy; e. past and present political activities of the potential brand ambassador; f. affiliations of potential brand ambassadors with individuals or organizations that have a bad reputation; g. involvements of potential brand ambassadors in criminal or immoral activities; h. past statements of the potential brand ambassadors in the media, including social media activities. By analyzing these points, companies can decide whether to choose the potential brand ambassador as the brand ambassador and create a risk mitigation strategy to manage future risks or drop the potential brand ambassador from the selection process. The selection process of a brand ambassador needs to be rigorous, however there is an Indonesian context that needs to be incorporated in the selection consideration, which is the fact that Cancel Culture in Indonesia is less prevalent than it is in South Korea (Anjarini, 2020). In South Korea, when a celebrity who became a Brand Ambassador got involved in a scandal, the celebrity will face a harsh backlash from the society. Companies will terminate the Brand Ambassador's contract and possibly banned the celebrity from future cooperation opportunities. Television stations oftentimes will also ban appearances of that celebrity in their networks for a long amount of time. In other terms, the South Korean celebrity will get "Cancelled". But in Indonesia, the Cancel Culture is not prevalent and oftentimes, the Indonesian public reaction towards scandalous celebrities was not as harsh as in South Korea. In Indonesia, celebrities who were involved in scandals often could "Un-cancel" themselves in a short period amount of time and made their way back into the public arena unscathed.

In creating advertisements, South Korean food manufacturing companies need to consider Indonesian cultural and religious values. In 2018, a video commercial by an Indonesian marketplace company which was featured a South Korean K-Pop Girl Group sparked a polemic in the society because their clothing in that commercial was deemed too revealing and their dance moves were considered inappropriate. The Indonesian Broadcasting Commission (KPI) eventually asked the marketplace company to withdraw the video commercial (Priherdityo, 2018). This does not mean that video commercials in Indonesia have to be very conservative but there are certain guidelines that need to be followed, such as the Indonesian Broadcasting Commission Regulation Number 01/P/KPI/03/2012 on Broadcasting Code of Conduct (Peraturan

Komisi Penyiaran Indonesia Nomor 01/P/KPI/03/2012 Tentang Pedoman Perilaku Penyiaran, 2012).

CONCLUSION

Based on the literature review, there are 10 factors that affect Indonesian consumers' purchase intentions of Korean food products. This study develops suggestions and insights for South Korean food manufacturing companies based on those factors. These suggestions and insights can be incorporated into the market entry strategy development process of South Korean food manufacturing companies that want to enter the Indonesian market. It is important for South Korean food manufacturing companies to have a thorough understanding of the Indonesian market based on the study of various business cases in Indonesia that are related to South Korea.

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