

MEAT & LIVESTOCK AUSTRALIA

Australian goatmeat supply chains



Australia is the world's largest exporter of goatmeat

80–90% of Australian goatmeat is exported

Global demand for goatmeat is increasing

Rangeland enterprises produce most Australian goatmeat



Why goatmeat?	Why Australian goatmeat?
Goatmeat is the preferred red meat for many ethnic groups making it one of the most culturally-diverse red meat proteins.	Australian goatmeat is desired globally for its: • Lean carcases • High food safety standards • Clean, green image.
The lean, high protein, nutritional benefits of goatmeat make it increasingly sought after.	There is high demand for Australian rangeland goats in export markets and growing interest domestically.
Interest in convenient, ready-to-cook goatmeat products is growing.	

Top 3 export markets for Australian goatmeat

Volume (tonnes) 2024

1. **USA (54%)**
   - Consumption driven in food outlet menu options and convenient home cooking
   - Buyers generally from varied ethnic backgrounds and familiar with goatmeat

2. **South Korea (17%)**
   - Consumed primarily in restaurants
   - Huge demand for skin-on, black goat – featured in health dishes.
   - Consumers value medicinal properties

3. **China mainland (10%)**
   - Exports surged in 2023 after Free Trade Agreement introduced
   - Largely purchased through food outlets
   - Imported product is processed into easy-to-cook products

More information

MLA Global Goatmeat Snapshots

MLA *From grid to consumer* webinar series

Domestic goatmeat markets: Supplying to Australian consumers

Who are the goatmeat consumers in Australia?

Ethnic consumers
- Familiar with goatmeat
- Want freshness, natural products, and traceability
- Purchase goatmeat at butcher shops and specialty stores.

Conscious consumers
- Prioritise health, sustainability and ethical sourcing
- Purchase goatmeat at farmers' markets
- Willing to pay for quality and transparency.

Adventurous consumers
- Wanting to try new products
- Try goatmeat in restaurants.

Supplying the domestic market
- Unlike export markets with many different homes, the domestic goatmeat market has a narrow weight range (10–18kg dressed) and tight product specifications based on customer and consumer preferences.
- Different customers and supply chains have different preferences so it's critical to ask processors what their preferred carcase requirements are.

Domestic butcher preferences for goatmeat supply

✓ Good meat to bone ratio	✓ Year-round supply	✓ Narrow weight range
✓ Consistent fat cover	✓ Mild flavour profile	✓ Clean, blemish free carcases

Case study: Grassland Goats, Blackall, QLD

Keeleigh and Brian Allport's Grassland Goats operation incorporates production, processing and direct sales to retail outlets across Queensland.



The Allports deliver 500–600 goats per week to butchers and meat wholesalers in south-east Queensland.

Initially transitioning from cattle to goats for drought resilience, the Allports now breed rangeland goats crossed with Boer and Kalahari lines to achieve faster growth and improved carcase yields.

Their focus is on supplying the domestic market with high-quality, Halal-certified meat that appeals to both ethnic and mainstream consumers.

The Allports emphasise the importance of genetics, nutrition, and traceability in maintaining product consistency and building customer trust.

Key challenges include limited abattoir access, high transport costs, and consumer unfamiliarity with goatmeat, but opportunities lie in education, branding, and direct marketing.

Aligning goat production with consumer value

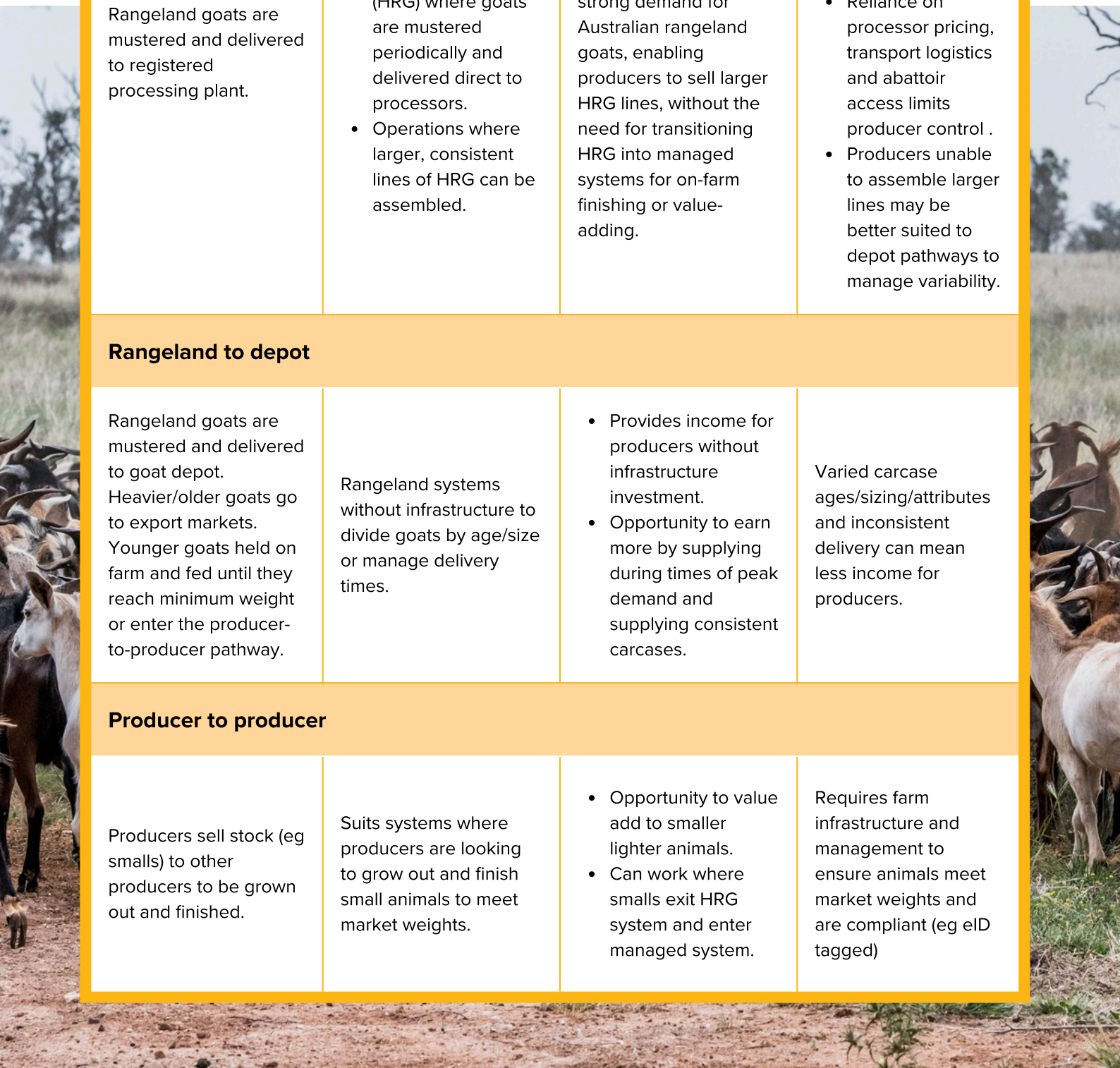
Consumers pay for what they value. Retailers and processors pay for what their consumers value. By working with the supply chain to understand their requirements, goat producers can tailor on-farm production systems to add value to their products.

What does the supply chain value?	How can goat producers deliver?
1. **Consistently supplied carcases:** Retailers and foodservice providers require a consistent, reliable supply of goatmeat to offer consumers. Processors have requirements to deliver goatmeat volumes to fill export and domestic contracts.	Consider on-farm breeding and management strategies such as controlled mating or staggered mustering to deliver more consistently. Infrastructure and transport need to be considered, to facilitate holding in smaller paddocks or holding properties to deliver a reliable supply of carcases.
2. **Carcases that meet specifications** • **Size and weight**: Being able to supply uniform carcases of a similar size and weight and in line with processor and retail requirements is valued. ◦ Domestic butchers may have more limited weight ranges they can take e.g young does/billies 10–14kg dressed. ◦ Export plants can handle more range in ages and weights by selling to different markets. • **Fat content:** Generally, export goats need to be leaner than the domestic market prefers. • **Meat to bone ratio:** Carcases with more meat and smaller bones is valued in supply chains particularly those supplying bone-out, diced or cubed products. • **Flavour:** Different consumers will value different flavour profiles. A milder flavour profile is associated with younger animals whereas some export markets value a stronger flavour associated with full male, rangeland goats.	1. Understand what the carcase specifications are through conversations with supply chain parties e.g. wholesalers and processors. 2. Select breeds to integrate the traits the supply chain requires. 3. Breed, select and turnoff animals into different markets based on the traits each supply chain requires. 4. Manage nutritional requirements through pasture management and rotational grazing. 5. Develop on-farm infrastructure – yards, holding pens, water access, loading facilities can help to sort goats by ages and manage delivery timeframes.
3. **Supply chain relationships:** By understanding the needs along the supply chain, each party can work to optimise value.	Talk to processors, wholesalers, goat buyers, agents, depots and butchers to understand requirements, carcase specifications and pricing structures and which options will work best for you.
4. **Sustainable and verified claims:** Certain consumers will value different attributes of goatmeat such as being grass-fed, Halal and free of antibiotics.	Understanding what claims you can consistently deliver on and what markets you can access that value and pay more for those claims will allow you to work out how to leverage opportunities.



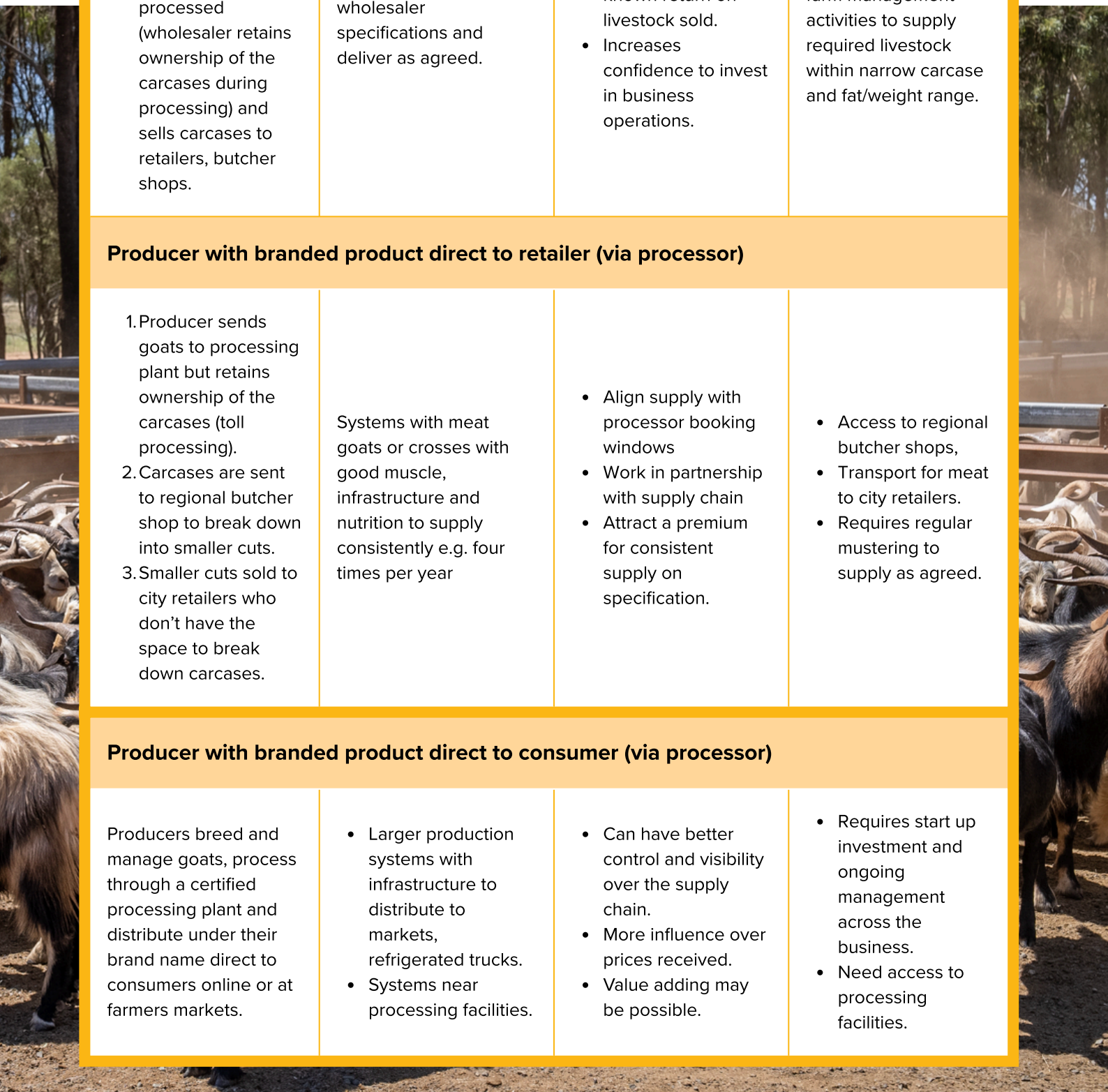
Goatmeat supply chain examples

Supply chain	Systems it suits	Opportunities	Challenges
Rangeland to processor			
Rangeland goats are mustered and delivered to registered processing plant.	• Extensive rangeland enterprises supplying harvested rangeland goats (HRG) where goats are mustered periodically and delivered direct to processors. • Operations where larger, consistent lines of HRG can be assembled.	Provides access direct from point of muster to processor delivering HRG to established export markets with strong demand for Australian rangeland goats, enabling producers to sell larger HRG lines, without the need for transitioning HRG into managed systems for on-farm finishing or value-adding.	• Varied weights, ages and condition can reduce compliance with processor specifications • Reliance on processor pricing, transport logistics and abattoir access limits producer control . • Producers unable to assemble larger lines may be better suited to depot pathways to manage variability.
Rangeland to depot			
Rangeland goats are mustered and delivered to goat depot. Heavier/older goats go to export markets. Younger goats held on farm and fed until they reach minimum weight or enter the producer-to-producer pathway.	Rangeland systems without infrastructure to divide goats by age/size or manage delivery times.	• Provides income for producers without infrastructure investment. • Opportunity to earn more by supplying during times of peak demand and supplying consistent carcases.	Varied carcase ages/sizing/attributes and inconsistent delivery can mean less income for producers.
Producer to producer			
Producers sell stock (eg smalls) to other producers to be grown out and finished.	Suits systems where producers are looking to grow out and finish small animals to meet market weights.	• Opportunity to value add to smaller lighter animals. • Can work where smalls exit HRG system and enter managed system.	Requires farm infrastructure and management to ensure animals meet market weights and are compliant (eg eID tagged)



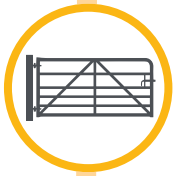
Goatmeat supply chain examples

Supply chain	Systems it suits	Opportunities	Challenges
Producer to domestic wholesaler (via processor)			
1. Wholesaler buys goats direct from producers according to specifications. 2. Goats are toll processed (wholesaler retains ownership of the carcases during processing) and sells carcases to retailers, butcher shops.	Systems able to meet wholesaler specifications and deliver as agreed.	• Price and volume normally agreed in advance - provides known return on livestock sold. • Increases confidence to invest in business operations.	Requires farm infrastructure and on farm management activities to supply required livestock within narrow carcase and fat/weight range.
Producer with branded product direct to retailer (via processor)			
1. Producer sends goats to processing plant but retains ownership of the carcases (toll processing). 2. Carcases are sent to regional butcher shop to break down into smaller cuts. 3. Smaller cuts sold to city retailers who don't have the space to break down carcases.	Systems with meat goats or crosses with good muscle, infrastructure and nutrition to supply consistently e.g. four times per year	• Align supply with processor booking windows • Work in partnership with supply chain • Attract a premium for consistent supply on specification.	• Access to regional butcher shops, • Transport for meat to city retailers. • Requires regular mustering to supply as agreed.
Producer with branded product direct to consumer (via processor)			
Producers breed and manage goats, process through a certified processing plant and distribute under their brand name direct to consumers online or at farmers markets.	• Larger production systems with infrastructure to distribute to markets, refrigerated trucks. • Systems near processing facilities.	• Can have better control and visibility over the supply chain. • More influence over prices received. • Value adding may be possible.	• Requires start up investment and ongoing management across the business. • Need access to processing facilities.



Finding a market for your goats

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Steps to finding a market	Considerations
 **Step 1.** Understand what goats you have	• Harvested rangeland goats (HRG) or farmed goats? • Ages and weights • Sexes • When can you supply?
 **Step 2.** Understand your operation	• Distance to markets? Proximity to potential supply chain partners? • On-farm infrastructure - Handling infrastructure, yards, fencing, water availability • Mustering logistics - people, distances, vehicles • Transport - trucks, loading ramps • Nutritional requirements - supplementary feeding options • Business knowledge - existing knowledge and experience • Staffing - people to support the operation • Core competencies - what are you good at producing? • Integrity Systems requirements - are you LPA and/or HRG accredited?
 **Step 3.** Talk to potential supply chain parties	Contact potential buyers (processors, wholesalers, butchers, depots and agents) to find out what they want: • Goat type: HRG or farmed? Ages, breeds, sexes? • Carcase specifics: Weight ranges? Fat cover and finish? • Timing: When do they need them? Year round or seasonally, certain times of the year? Are there opportunities to supply goats for religious or cultural events? • Pricing: What price will they offer? How can you find out about pricing changes? • Premiums: Will they pay more for a regular supply, consistent line of same weight or a better meat-to-bone ratio? • Do they have processing space limitations or shutdown periods?
 **Step 4.** Map your options	Based on your operation, the products you can supply and what your buyers are looking for - work out who your potential customers could be and market options. Consider short term and longer term, aspirational options.

Resources

MLA: Goats Hub

Integrity Systems Company: LPA requirements for for HRG's

Ausmeat: List of accredited goat processors

Finding a market for your goats



Step 5. Work with the supply chain

Building good relationships with suppliers based on two-way communication and trust helps everyone.
Things to think about:

- How will the agreed price be formalised? e.g. written, contract
- If you are booked in, make sure you can deliver as agreed. If something happens and you won't have the goat numbers or can't get animals to the destination as agreed, let the processor know ASAP so they can make alternative arrangements.
- If goats are in short supply, will you muster for buyers if it's not in your plan?
- Ask for feedback on the goats you have supplied to understand what worked well and what improvements are needed (e.g. health/disease issues, condemned, under weight etc)
- Food service outlets and butcher shops struggle with large fluctuations in prices and supply. Agreeing on a price with a profit margin for all parties enables supply contracts to be entered into with a degree of confidence, expanding market access for goatmeat.



Step 6. Consider ongoing improvements

It is important to evaluate your operation and consider improvements you could make to increase your income, such as:

1. Genetics and breeding - selecting lean, meaty breeds or cross breeding for desired traits.
2. Nutrition - supplementary feeding to maintain consistent carcases, improve growth rates, improve doe reproduction and condition during lactation.
3. On-farm management - infrastructure improvements, controlled mating with different drops throughout the year, muster and sort into smaller holding paddocks to deliver more consistently.
4. Supply-chain collaboration - working to understand the needs of all parties and how to reduce costs and maximise value across the supply chain.
5. Building your brand - creating a business name and brand, develop online presence (social media, webpage, images), telling your story. How can you differentiate your business in a growing industry?
6. Value adding - are there claims you can consistently deliver on e.g. grass-fed, Halal or other value you can add?
7. Building knowledge and capability - Can you use external expertise to boost the skills, capacity and capability of your operation? Are there areas you can increase your knowledge – courses, webinars and training?

TIP Calculate the cost of improvements against the potential income to make sure proposed changes are cost effective.

Meat & Livestock Australia
Source: From grid to consumer - Building a consumer-oriented goatmeat supply chain (2025)