Goatmeat is widely consumed around the world but remains a largely niche protein, in demand only among key ethnic segments. Per capita consumption varies greatly between countries and is largely underpinned by local production as well as tradition. While population growth and increasing household wealth provides a positive outlook for global meat consumption, Australian goatmeat needs to increase its level of familiarity and overcome barriers to trial to tap into opportunities in developed markets.

Challenges and opportunities for Australian goatmeat across the globe include:

- Goatmeat, when compared to other proteins, has the advantage of no religious taboos and, in some cultures, has a unique role in religious and traditional family events.
- Its niche status can be considered a challenge, but also an opportunity in markets where there is potential to dial up health and premiumisation credentials.
- Consumers’ lack of familiarity with goatmeat and consequent low confidence preparing it remain challenges for goatmeat across many markets.
- The US is the dominant importer of Australian goatmeat, but there is opportunity to expand globally and diversify markets. Australia’s ability to capitalise on this potential will depend on remaining price competitive to local production, and the ability of other major goat producing countries to shift into the export market.
- Australian goatmeat production and exports are exposed to the somewhat volatile supply of the rangeland goat flock and seasonal conditions.

**Australian goatmeat production**

- Total 31,414 tonnes carcase weight (cwt)
- Domestic – 2,988
- Exports – 28,426

**Australian goatmeat exports by cut**

- Total 28,426 tonnes shipped weight (swt)
- Other – 3%
- Carcase – 97%

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Australia

Production and the domestic market

Australian goat production

![Graph showing Australian goat production from 2000 to 2017.](source: ABS)

Australian carcase weight

![Graph showing Australian carcase weight from 2000 to 2017.](source: ABS)

Australian goat slaughter

![Graph showing Australian goat slaughter from 2000 to 2017.](source: ABS)

Over-the-hooks indicator comparison

![Graph showing over-the-hooks indicator comparison from 2007 to 2018.](source: MLA)

- Australian goat slaughter rose by 7% year-on-year to 2.07 million head in 2017. Goat slaughter peaked in 2015 following a period of historically low rainfall across eastern Australia. However, 2016 saw an improvement in seasonal conditions across key goat producing regions, tightening supplies in the short-term but accounting for some of the recovery in 2017.

- Goat production was 4% higher on the previous year, totalling 31,000 tonnes carcase weight (cwt). Unlike sheep and lamb, goat carcase weights have had little influence on production figures, hovering between 15–16kg as they have been for the past decade. Strong local prices have significantly diminished the demand for Australian live goat exports, with 12,209 head shipped in 2017, representing a fall of 86% since 2015.

- After a steady upward trajectory for the most part of four years, over-the-hook goat price indicators peaked in July 2017 and since then have fallen, caused in part by the strengthening Australian dollar, increasing supplies of other small stock and some permanent or temporary plant closures. Prices are currently similar to levels from 12 months prior.

Summary table

| Year | 00  | 01  | 02  | 03  | 04  | 05  | 06  | 07  | 08  | 09  | 10  | 11  | 12  | 13  | 14  | 15  | 16  | 17  |
|------|-----|-----|-----|-----|-----|-----|-----|-----|-----|-----|-----|-----|-----|-----|-----|-----|-----|
| Slaughterings (‘000 head) | 737 | 713 | 1,056 | 1,078 | 1,128 | 1,204 | 1,201 | 1,035 | 1,124 | 1,637 | 1,676 | 1,739 | 1,857 | 2,073 | 2,129 | 2,140 | 1,934 | 2,071 |
| Average carcase weight (kg) | 15.4 | 14.6 | 14 | 14.3 | 15.2 | 15.3 | 15.5 | 15.5 | 15.6 | 15.7 | 15.8 | 15.3 | 15.1 | 15.3 | 15.7 | 15.2 |
| Production (‘000 tonnes carcase weight) | 11.4 | 10.4 | 14.8 | 15.5 | 17.2 | 18.4 | 18.6 | 16.1 | 17.5 | 25.8 | 26.5 | 28.4 | 29.8 | 31.7 | 32.9 | 32.7 | 30.3 | 31.4 |
| Goat exports (‘000 tonnes shipped weight) | 12.5 | 12.4 | 15.7 | 15.9 | 16.9 | 18.2 | 19.5 | 16.7 | 18.2 | 24.8 | 25.9 | 25.9 | 29.1 | 32.7 | 35.8 | 30 | 26.8 | 28.4 |
| Goat exports (‘000 AUD) | 37,941 | 36,210 | 47,326 | 48,488 | 59,294 | 74,212 | 90,386 | 61,620 | 62,102 | 86,249 | 113,051 | 127,587 | 132,886 | 160,559 | 241,208 | 243,167 | 200,322 | 257,194 |
| Live goat exports (‘000 head) | 51.3 | 106 | 136.1 | 70.9 | 50.5 | 41.7 | 57.6 | 89.9 | 79.8 | 976 | 774 | 63.3 | 61.9 | 75.1 | 88.5 | 87.7 | 54.2 | 12.2 |
| Live goat exports (‘000 AUD) | 3,072 | 6,761 | 10,249 | 12,396 | 4,682 | 5,086 | 7,026 | 11,367 | 9,590 | 11,491 | 10,346 | 8,408 | 8,114 | 8,373 | 8,646 | 10,215 | 7,979 | 2,924 |

Source: ABS, DAWR, Global Trade Atlas
The goatmeat production industry is well-regarded among Australian consumers, ranked the least impactful on both the environment and animal welfare of all meats, except kangaroo. (Source: Pollinate Consumer Tracker 2017).

The majority of goatmeat is harvested from semi-wild rangeland goats. A 2017 survey of NSW goatmeat producers found that 71% of the 454 enterprise producers who responded had a harvest enterprise, while 29% operated a managed or semi-managed enterprise. (Source: NSW DPI/MLA Goat Industry Data Collation and Tracking Project, 2017).

However, most Australian consumers rarely eat goatmeat, although one third of consumers would consider doing so. (Source: MLA Domestic Consumer Tracker 2017).

Goatmeat is considered most suitable for slow, wet cooking methods like curry, and as such is strongly associated with Indian, Pakistani and Nepalese cuisines. On menus, goat is often interchangeable with lamb and other red meats. (Source: GlobalData Foodservice Menu Intelligence, 2017).

Potential success drivers for goatmeat in Australia
These drivers have been successful among other secondary proteins such as turkey, kangaroo and duck.

1. A bit special – giving consumers the opportunity and tools to make a restaurant-quality goat dish at home
2. New food culture – taking advantage of goat being a widely-consumed meat to kickstart a new trend
3. Seasonal suitability – finding a season to suit goat, like summer for seafood and spring for lamb
4. Health credentials – goat is lean, and not much of it is needed to impact a dish. (Source: MLA/DIJ Strategy, Value Adding Goatmeat for Australian Consumers, 2017).

Exports to global markets

Exports live vs boxed by value

- Total A$260 million
- Boxed – 99%
- Carcase – 97%
- Other – 3%

Exports (boxed) by cut

- Total 28,426 tonnes swt
- Frozen – 99.5%
- chilled – 0.5%
- Australia’s share of global exports (boxed) by volume
- 85%
- Other – 15%

Exports (boxed) chilled vs frozen

- USA
- Taiwan
- South Korea
- Canada
- Trinidad and Tobago
- Other

Source: Global Trade Atlas, ABS, 2017

Australian goatmeat exports by volume

- Five-year average (2011–15)
- 2016
- 2017

Source: DAWR

• Australian goatmeat is almost exclusively exported as a whole carcase (frozen). In 2017, only 1% of total export value was live, representing a substantial decline on 2016. The live export market has been strongly affected by price-sensitive demand in Malaysia, which receives the vast majority of live goats.

• Globally, Australia is a minor producer of goatmeat but one of the biggest exporters.

• Goatmeat shipments recovered in 2017, increasing 6% year-on-year to 28,426 tonnes swt, halting a three-year decline in the trade and reflecting the increase in goat supplies. Australian goatmeat exports were valued at $257 million in 2017, which was a 42% gain on the previous year.
The US remains the key market for boxed goatmeat, accounting for 66% of exports by volume in 2017. Taiwan, Trinidad and Tobago, South Korea and Canada are also consistent importers of Australian boxed goatmeat, while Malaysia is the main destination for live trade.

MLA's Global Consumer Tracker 2017 suggests that there are also a number of markets with latent demand for goatmeat that do not currently feature in top export destinations for Australia, that may present growth opportunities in future with the right market conditions.

Average goat meals in past seven days

USA goatmeat imports

<table>
<thead>
<tr>
<th>Country</th>
<th>Goatmeat Imports</th>
</tr>
</thead>
<tbody>
<tr>
<td>Australia</td>
<td>98.4%</td>
</tr>
<tr>
<td>NZ</td>
<td>0.9%</td>
</tr>
<tr>
<td>Mexico</td>
<td>0.7%</td>
</tr>
<tr>
<td>United States</td>
<td>11%</td>
</tr>
</tbody>
</table>

Source: Global Trade Atlas, 2017

Spontaneous awareness (%)

USA and Canada

North America has long been the largest and most important market for Australian goatmeat. This is set to continue, driven by population growth, demographic change, and evolving consumer tastes.

The US accounts for 66% of Australian goatmeat exports in 2017, a total of 18,885 tonnes. Canada is also a significant market, accounting for 6% in 2017. (Source: Global Trade Atlas).

Exports to both markets have increased significantly year-on-year, with exports to the US up 6.1% and Canada up 63.6% compared to 2016. (Source: Global Trade Atlas). In the US market, Australia is the dominant player in imported goatmeat, accounting for 98.5% of imports.

The Canadian market has seen significant changes in 2017. Australia remains the major player, but New Zealand imports have increased more than 100% year-on-year to now pose serious competition to Australia. Furthermore, the USA has started exporting goatmeat in significant quantities to Canada, with 32 tonnes recorded in 2017. (Source: Global Trade Atlas).

Although goatmeat consumption is growing, goat remains a niche protein in North America, with a low ‘share of mind’ when it comes to meats consumers consider buying. The main reason for this is that many consumers are simply not familiar with goatmeat, having not grown up eating it as part of their meat repertoire, and therefore don’t know how to cook it.

Barriers to buying goatmeat

Those who buy goat are likely to do so based on their own cultural experience. Many of those who have previously bought goatmeat are ‘urban eclectics’ – younger, urban, affluent consumers looking for shortcuts when buying and preparing meat. Compared to the general population, they care more about novelty, variety, healthiness, and animal welfare. (Sources: MLA Global Consumer Tracker 2017 and Midan Marketing “Meat Consumer Segmentation” 2016).
• Goat buyers are likely to identify as having ethnic origin outside of North America, with a skew towards Latino, Indian and Middle Eastern backgrounds.

**Ethnic background**

<table>
<thead>
<tr>
<th>Ethnicity</th>
<th>Goat buyers</th>
<th>Total population (in survey)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Indian</td>
<td>10%</td>
<td>20%</td>
</tr>
<tr>
<td>Chinese</td>
<td>15%</td>
<td>30%</td>
</tr>
<tr>
<td>Other Asian</td>
<td>5%</td>
<td>10%</td>
</tr>
<tr>
<td>Middle Eastern</td>
<td>15%</td>
<td>30%</td>
</tr>
<tr>
<td>Other African</td>
<td>5%</td>
<td>10%</td>
</tr>
<tr>
<td>Central or South American</td>
<td>5%</td>
<td>10%</td>
</tr>
</tbody>
</table>

Source: MLA Global Consumer Tracker 2017

• Additionally, 6.9% of goat buyers identify as followers of Hinduism or Islam – more than 2.5 times the national average. Of the surveyed regions, goat buyers skew towards Washington DC, San Francisco, and Florida.

**Geographic distribution**

<table>
<thead>
<tr>
<th>City</th>
<th>Goat buyers</th>
<th>Total population (in survey)</th>
</tr>
</thead>
<tbody>
<tr>
<td>New York City</td>
<td>20%</td>
<td>40%</td>
</tr>
<tr>
<td>Boston</td>
<td>15%</td>
<td>30%</td>
</tr>
<tr>
<td>San Francisco</td>
<td>25%</td>
<td>50%</td>
</tr>
<tr>
<td>Los Angeles</td>
<td>20%</td>
<td>40%</td>
</tr>
<tr>
<td>Washington DC</td>
<td>15%</td>
<td>30%</td>
</tr>
<tr>
<td>Fort Lauderdale</td>
<td>5%</td>
<td>10%</td>
</tr>
<tr>
<td>Houston</td>
<td>10%</td>
<td>20%</td>
</tr>
<tr>
<td>Chicago</td>
<td>10%</td>
<td>20%</td>
</tr>
<tr>
<td>Toronto</td>
<td>5%</td>
<td>10%</td>
</tr>
<tr>
<td>Vancouver</td>
<td>5%</td>
<td>10%</td>
</tr>
</tbody>
</table>

Source: MLA Global Consumer Tracker 2017

• Goat buyers tend to be larger consumers and more frequent buyers of all meats, especially lamb - goat buyers are twice as likely to have also bought lamb in the past month. (Source: MLA Global Consumer Tracker 2017).

• Goatmeat tends to be bought by those who love meat of all kinds and are looking to expand their tastes and cooking repertoires.

• Goatmeat is usually sold in cubes and can be seen as interchangeable with mutton and even lamb among some groups. A survey of menus featuring goatmeat suggests it is typically used in curry, stew or other slow-cooked cuisine, often Indian or Nepalese, and frequently offered as a choice of meat alongside lamb or beef. Other cuisines where goatmeat features prominently include Caribbean, North African, and Mediterranean. Goatmeat is increasing its presence on menus, with a 43% growth in penetration from 2011–15, but remains niche. A growing trend in foodservice is pulled goat, often as an ingredient in tacos or burgers. (Sources: Datassential MenuTrends, 2016; GlobalData Foodservice Menu Intelligence, 2017).

<table>
<thead>
<tr>
<th>Strengths</th>
<th>Weaknesses</th>
</tr>
</thead>
<tbody>
<tr>
<td>Low in fat</td>
<td>Easy and convenient to purchase</td>
</tr>
<tr>
<td>High nutritional value</td>
<td>My/my family’s favourite</td>
</tr>
<tr>
<td>The animal is well-cared for</td>
<td>Can be used in many different meals</td>
</tr>
</tbody>
</table>

Source: MLA Global Consumer Tracker 2016, Taiwan

### Consumer profile

<table>
<thead>
<tr>
<th>Country</th>
<th>2017e</th>
<th>2021f</th>
</tr>
</thead>
<tbody>
<tr>
<td>US</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Population (million)</td>
<td>324.5</td>
<td>333.8</td>
</tr>
<tr>
<td>Gross domestic product per capita (US$)</td>
<td>57,401</td>
<td>65,013</td>
</tr>
<tr>
<td>Household earning &gt;US$35,000/year</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Number of households (million)</td>
<td>741</td>
<td>82.0</td>
</tr>
<tr>
<td>% of total households</td>
<td>68.9</td>
<td>73.0</td>
</tr>
<tr>
<td>Household earning &gt;US$50,000/year</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Number of households (million)</td>
<td>51.5</td>
<td>59.6</td>
</tr>
<tr>
<td>% of total households</td>
<td>511</td>
<td>56.5</td>
</tr>
<tr>
<td>Canada</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Population (million)</td>
<td>36.6</td>
<td>379</td>
</tr>
<tr>
<td>Gross domestic product per capita (US$)</td>
<td>45,320</td>
<td>51,065</td>
</tr>
<tr>
<td>Household earning &gt;US$35,000/year</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Number of households (million)</td>
<td>11.0</td>
<td>12.2</td>
</tr>
<tr>
<td>% of total households</td>
<td>77.8</td>
<td>81.4</td>
</tr>
<tr>
<td>Household earning &gt;US$50,000/year</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Number of households (million)</td>
<td>7.4</td>
<td>8.6</td>
</tr>
<tr>
<td>% of total households</td>
<td>54.5</td>
<td>59.9</td>
</tr>
</tbody>
</table>

Source: BMI Research

### Taiwan

• In 2017, Taiwan was the second largest market for Australian goat exports behind the US – a position it has held since 1996. Australian goatmeat makes up almost the entire import market, with the only other importer being New Zealand.

• Goat is typically shipped to Taiwan as skin-on carcase. Higher prices, competition from other markets and limited supply of skin-on goat are the main contributing factors that have led to the recent fall in Australian goatmeat exports to Taiwan.

• In terms of domestic production, the Taiwanese goat herd consists of mainly purebred Nubian and Nubian-Boer crossbreeds.

• Typically consumed in restaurants, goatmeat contributes to a relatively small portion of the total protein consumed in Taiwan. Identified as a ‘warming medicinal’ food due to its ability to strengthen and warm the body, goat is typically served in specialised restaurants during winter, and in slow-cooked dishes such as Chinese herbal stews and hotpots.

• Familiarity and availability remain key challenges for goatmeat consumption at home.
Taiwan goatmeat imports

- Taiwan goatmeat imports from Australia and New Zealand from 2006 to 2017.
- Australia dominates the market, with New Zealand making up a small portion.

Spontaneous awareness (%)

- Beef is the most popular choice, followed by pork, chicken, lamb, and goat.

Share of Taiwan goatmeat imports

- 99.2% of goatmeat imports are from Australia, with New Zealand contributing 0.8%.

Barriers to buying goatmeat (%)

- Lack of availability and unfamiliarity are key barriers.

Australian goatmeat exports to Trinidad and Tobago – value

- Exports have risen steadily over the past decade, with volumes remaining relatively stable and average export values increasing.

Trinidad and Tobago

- Trinidad and Tobago is a twin island located just off the northeastern coast of Venezuela in the Lesser Antilles.
- It remains Australia’s largest trading partner in the region.

- The Caribbean Agricultural Research & Development Institute states that there are more than six million sheep and goats being raised on farms across the Caribbean, and meat from these small ruminants is a highly desirable commodity.
- Goatmeat cuisine is enjoyed throughout the Caribbean, often in the form of a traditional Indo-Caribbean curry goat dish.

- In 2017, goatmeat contributed to a significant proportion of bilateral trade between Australia and Trinidad and Tobago.
- The value of Australian goatmeat exports to Trinidad and Tobago in 2017 was AUD 12.4 million.
- Export values have risen steadily over the past decade, with volumes remaining relatively stable.

Consumer profile

- 2017e: 1.37
- 2021f: 1.38

- 2017e: 15,171
- 2021f: 13,248

Indo-Caribbean style curry goat dish

- Source: Shutterstock
Korea

Although goatmeat is not a common protein in daily diets, it is consumed by many Koreans for medicinal purposes due to traditional beliefs that goatmeat has high nutritional value, can help circulate energy, balance the yin and yang, and invigorate the body. It is increasingly consumed during the Sambok period (the hottest days in summer, from mid-July to mid-August).

Korean consumers have a preference for skin-on goatmeat, which is typically served in specialised restaurants, and in slow-cooked dishes such as stews, soups, or boiled dishes. Familiarity and availability remain key challenges for goatmeat consumption at home.

Korea is one of the world’s largest online retail markets, but the use of the online retail channel for meat purchase remains limited due to consumer concerns about food safety, and a preference for seeing the meat before buying it. However, usage has grown recently on the back of rapid change in lifestyles and shopping habits of Korean consumers (online transaction value of meat, fish and seafood totalled at approximately A$2.4 billion in 2017, up 18% year-on-year [Source: KOSIS]. Local or Australian goatmeat can be found on major online shopping platforms such as Gmarket, Auction, and 11Street. Some online vendors have incorporated an introduction of cuts and cooking methods that suit Korean tastes, alongside the product listing, to boost consumer awareness.

Goatmeat in Korea is derived from both domestic supplies and imports, with Australia being a long-standing key trading partner. Goatmeat imports from Australia reached a record high in 2017 (at 1,752 tonnes shipped weight, up 9%). The increased demand for goatmeat was partly supported by the influx of Nepalese residents in Korea.

Goatmeat compared to other proteins

Strengths

- Low in fat
- High nutritional value
- The industry is environmentally sustainable

Weaknesses

- Easy and convenient to purchase
- Tastes delicious
- Can be used in many different meals

Source: MLA Global Consumer Tracker 2017, Korea

Korea goatmeat imports

Source: Global Trade Atlas

Consumer spontaneous awareness (%)

Source: MLA Global Tracker 2017, Korea

Barriers to buying goatmeat

Source: MLA Global Tracker 2017, Korea

Consumer profile 2017e 2021f

Korea

<table>
<thead>
<tr>
<th></th>
<th>2017e</th>
<th>2021f</th>
</tr>
</thead>
<tbody>
<tr>
<td>Population (million)</td>
<td>51.0</td>
<td>51.7</td>
</tr>
<tr>
<td>Gross domestic product per capita (US$)</td>
<td>30,180</td>
<td>40,981</td>
</tr>
<tr>
<td>Household earning &gt;US$35,000/year</td>
<td>13.3</td>
<td>17.7</td>
</tr>
<tr>
<td>% of total households</td>
<td>64.7</td>
<td>82.5</td>
</tr>
<tr>
<td>Household earning &gt;US$50,000/year</td>
<td>6.5</td>
<td>11.7</td>
</tr>
<tr>
<td>% of total households</td>
<td>31.8</td>
<td>54.4</td>
</tr>
</tbody>
</table>

Source: MLA Global Consumer Tracker 2017, Korea

Korean goat stew dish

Source: MLA
Malaysia

• Goatmeat remains the least frequently consumed protein compared to other major meats. However, it can be widely used in place of other meats in a number of popular meat-based Malaysian dishes, such as curry and rendang (a slow-cooked dish of meat, spices and coconut milk).

• Goatmeat is consumed less at home due to a range of factors, it is consumed more at restaurants and celebration/ceremonial venues. Malaysia has a greater proportion of consumers surveyed claiming that they do not buy and prepare goatmeat at home but do eat it when dining out in comparison with the global average (Source: MLA Global Consumer Tracker 2017, Malaysia).

Goatmeat compared to other proteins

<table>
<thead>
<tr>
<th>Strengths</th>
<th>Weaknesses</th>
</tr>
</thead>
<tbody>
<tr>
<td>The animal is well-cared for</td>
<td>Easy and convenient to purchase</td>
</tr>
<tr>
<td>Guaranteed safe to eat</td>
<td>Essential part of children’s diet</td>
</tr>
<tr>
<td>The industry is environmentally sustainable</td>
<td>Easy and convenient to prepare</td>
</tr>
</tbody>
</table>

Source: MLA Global Consumer Tracker 2017, Malaysia

Barriers to buying goatmeat

• Malaysia relies heavily on imports for red meat supplies including goatmeat (more than 80%) (Source: Department of Statistics Malaysia). Australia has long been the largest supplier of goatmeat to the market.

• Malaysia is also the largest export market for Australian live goat. However, the surge in live goat prices has resulted in a dramatic decline in trade (down 75% to 11,523 head in 2017 from 46,119 head in 2016).

Australian live goat vs. live sheep exports to Malaysia

Source: MLA Global Consumer Tracker 2017, Malaysia

Consumer profile

<table>
<thead>
<tr>
<th></th>
<th>2017e</th>
<th>2021f</th>
</tr>
</thead>
<tbody>
<tr>
<td>Malaysia</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Population (million)</td>
<td>31.6</td>
<td>33.3</td>
</tr>
<tr>
<td>Gross domestic product per capita (US$)</td>
<td>9,938</td>
<td>13,774</td>
</tr>
<tr>
<td>Household earning &gt;US$35,000/year Number of households (million)</td>
<td>0.9</td>
<td>18</td>
</tr>
<tr>
<td>% of total households</td>
<td>12.0</td>
<td>219</td>
</tr>
<tr>
<td>Household earning &gt;US$50,000/year Number of households (million)</td>
<td>0.4</td>
<td>0.9</td>
</tr>
<tr>
<td>% of total households</td>
<td>5.6</td>
<td>10.8</td>
</tr>
</tbody>
</table>

Source: BMI Research

Australia’s high goat prices and tight supplies have led Malaysian importers to seek alternative, more affordable sources of live goat such as Myanmar or Thailand, and other substitute products for goatmeat.

• Australian live sheep prices are more affordable and available than goat, furthermore, sheepmeat can be used interchangeably with goatmeat in many Malaysian dishes. As such, there has been a recent rise in Australian live sheep exports to Malaysia. However, the market remains highly price-sensitive.
Market access overview

North America

- Trade agreement
  - US – Australia-United States Free Trade Agreement (AUSFTA)
  - Canada – no free trade agreement

Import tariff – 0%

Technical access
- US – Issues include point of entry inspection, label approvals and port mark compliance.

Korea

- Trade agreement
  - Korea-Australia Free Trade Agreement (KAFTA)

Import tariff
- 11.2% in 2018
- 9.0% in 2019
- 0% in 2023

Import tariffs
- Frozen and chilled goatmeat
- NT$11.3/KGM or 15% whichever is higher

Taiwan

- Trade agreement
  - No free trade agreement

Import tariff
- 0% under Common external tariff of the Caribbean Community (CARICOM CET)

Trinidad and Tobago

- Trade agreement
  - No free trade agreement

Malaysia

- Trade Agreement
  - ASEAN-Australia-New Zealand Free Trade Agreement (AANZFTA)
  - Malaysia-Australia Free Trade Agreement (MAFTA)

Import tariff
- 0% for meat of goat and live goat

Technical access
- Maintains import regulations in accordance with Halal requirements.

Source: World Trade Organization, Canada Border Services Agency, MLA, Customs Administration, DFAT, Customs Administration - Republic of China, St. Lucia Customs & Excise Department.

Australian goatmeat exports – summary table

<table>
<thead>
<tr>
<th>Volume – in tonnes shipped weight (swt)</th>
<th>2017</th>
<th>% out of total</th>
<th>2016</th>
<th>% out of total</th>
<th>5-year average (2012-2016)</th>
<th>% out of total</th>
<th>change 2017 vs 5-yr av.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total</td>
<td>28,426</td>
<td>100</td>
<td>26,794</td>
<td>100</td>
<td>30,861</td>
<td>100</td>
<td>-8</td>
</tr>
<tr>
<td>Storage</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Chilled</td>
<td>13</td>
<td>0.05</td>
<td>5</td>
<td>0.02</td>
<td>70</td>
<td>0.2</td>
<td>-81</td>
</tr>
<tr>
<td>Frozen</td>
<td>28,413</td>
<td>99.95</td>
<td>26,789</td>
<td>99.98</td>
<td>30,790</td>
<td>99.8</td>
<td>-8</td>
</tr>
</tbody>
</table>

Source: DAWR

<table>
<thead>
<tr>
<th>Value – in A$ 000</th>
<th>2017</th>
<th>% out of total</th>
<th>2016</th>
<th>% out of total</th>
<th>5-year average (2012-2016)</th>
<th>% out of total</th>
<th>change 2017 vs 5-yr av.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total</td>
<td>257,194</td>
<td>100</td>
<td>200,322</td>
<td>100</td>
<td>195,628</td>
<td>100</td>
<td>31</td>
</tr>
</tbody>
</table>

Source: ABS/GTA

Australian goatmeat exports to US

- Carcase
  - 18,202 | 96
  - Total volume in tonnes swt: 18,885 | 100
  - Total value A$ 000: 181,078 | 100

Source: DAWR, GTA

Australian goatmeat exports to Canada

- Carcase
  - 1,795 | 99
  - Total volume in tonnes swt: 1,814 | 100
  - Total value A$ 000: 15,768 | 100

Source: DAWR, GTA

Australian goatmeat exports to Taiwan

- Carcase
  - 3,553 | 100
  - Total volume in tonnes swt: 3,553 | 100
  - Total value A$ 000: 22,842 | 100

Source: DAWR, GTA

Australian goatmeat exports to South Korea

- Carcase
  - 1,792 | 99
  - Total volume in tonnes swt: 1,806 | 100
  - Total value A$ 000: 16,665 | 100

Source: DAWR, GTA

Australian goatmeat exports to Trinidad and Tobago

- Carcase
  - 1,367 | 99
  - Total volume in tonnes swt: 1,378 | 100
  - Total value A$ 000: 12,433 | 100

Source: DAWR, GTA

Australia live goat exports total

- Total volume in head: 12,209 | 54,201
- Total value A$ 000: 2,824 | 7,979

Source: DAWR (2016, 2017 volume); ABS/GTA (5-year-average volume, and value)