

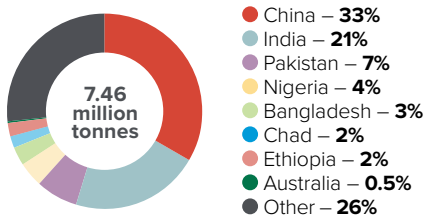


GLOBAL SNAPSHOT | GOATMEAT



Goatmeat is a niche protein consumed around the world that has no associated religious or cultural restrictions. There is great variability in per capita consumption between countries, driven mostly by local production volumes and tradition. Goatmeat is often associated with specific cooking methods, dishes and cuisines and hence is more popular in certain ethnic communities. Australia has a relatively small goat flock but is the world's largest exporter of goatmeat, supplying high-value markets such as the US and Korea. Record production and export volumes have supported the expansion of goatmeat consumption, increasing availability beyond foodservice into retail. Rising concern about health and sustainability, alongside consumer interest in novel and exciting ingredients, all contribute to a positive demand outlook for goat consumption in key markets.

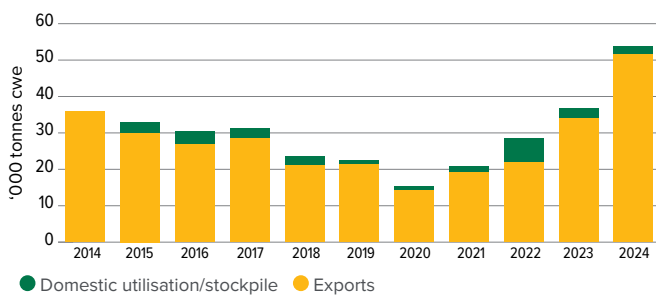
Global goatmeat production



Source: FAO, 2023

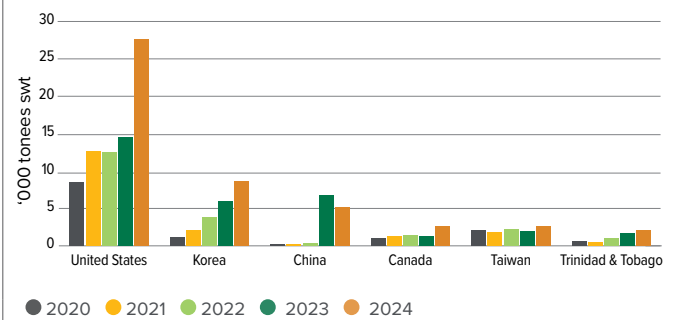


Australian goatmeat exports and domestic utilisation



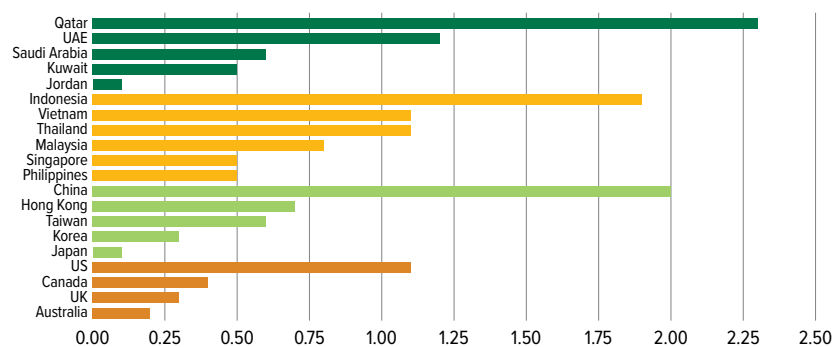
Source: ABS, DAFF, MLA calculations

Australian goatmeat export value for key markets



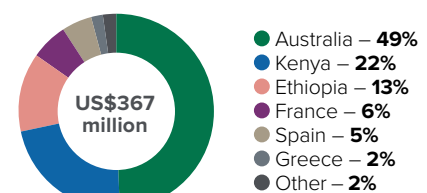
Source: DAFF

Average goatmeat meals in the past seven days



Source: MLA Global Consumer Tracker, 2017–2024

Global goatmeat export value



Source: FAO, 2023

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Australian goatmeat demand will continue to benefit from opportunities in domestic and key global markets by leveraging its strengths and addressing some barriers:

- Goatmeat is a meat protein considered to be highly nutritious.
- The widely acknowledged health benefits of goatmeat can be leveraged to meet growing global demand for health, wellness and nutrition.
- Goatmeat is generally considered most suitable for slow, wet cooking methods.
- Opportunities to increase trial and consumption of goatmeat could tap into the appeal of cuisines that traditionally utilise goatmeat, such as South Asian (Indian, Pakistani, Nepalese), Caribbean, Middle Eastern and some Asian and South American cuisines.

- In key export markets, Australian goatmeat is highly regarded for its quality and sustainability credentials, thanks to the high-standard and free-range production systems.
- The increased supply, together with the expansion of goat-specific processing plants, have improved the availability and consistency of Australian goat meat, boosting buyers' confidence to include goat on menus and retail shelves.
- A challenge across many markets is consumers' lack of access to and familiarity with goatmeat, and their consequently low levels of confidence in preparing and cooking it.
- On menus, goat is often seen as interchangeable with sheepmeat and other red meats, in part driven by a lack of availability, price and differentiation (Source: MLA International Markets teams).



Production and supply

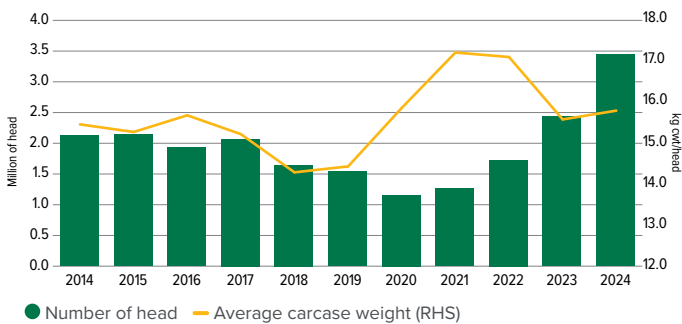
- In 2024, the Australian goat industry achieved a record production volume, exceeding the 2023 record by 47%. Production growth has been building since 2020 following an extended period of more favorable weather. Together, rapid flock size growth and expanded processing capacity have underpinned a 248% production increase since 2020.
- According to the Australian Bureau of Statistics (ABS), in 2024 goat slaughter increased 41% year-on-year to a total of 3,444,539 head.

Australian goat slaughter by state, 2024		
State	Processed number of head	% change 2023–2024
Victoria	1,539,286	+35%
Queensland	934,646	+29%
NSW	882,285	+100%
SA	69,327	-37%
WA	18,995	-40%
National total	3,444,539	+41%

Source: ABS

- Goatmeat production in 2024 increased 47% from 2023 levels, totalling 54,017 tonnes carcase weight (cwt). The average carcase weight in 2024 were similar to 2023 at 15.8kg per head. NSW is considered Australia's largest source of goats, supplying both local and neighbouring state abattoirs.

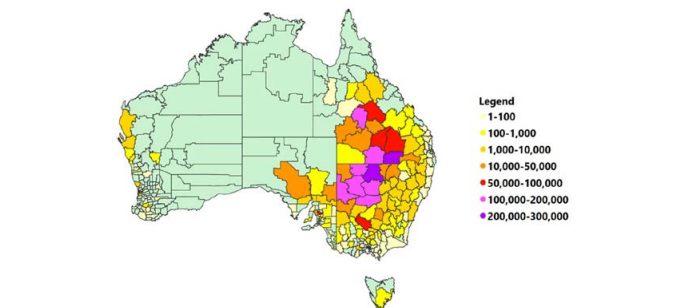
Australian goat slaughter and carcase weight



Source: ABS, MLA calculations

- The majority of Australian goatmeat comes from harvested rangeland goats. However, the number of goats from managed production systems has been increasing over the long term, contributing to a more consistent supply. The main production regions are in north-western New South Wales, followed by southern Queensland. An aerial survey conducted by NSW DPI in 2024 estimated the goat population in NSW to be 5.9 million.

Number of goats supplied for processing from each NLIS* region in Australia

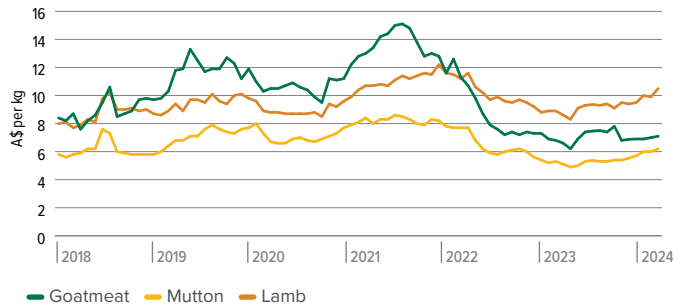


Source: Atkinson et al. 2025; Data Source: Integrity Systems Company.
*NLIS: National Livestock Identification System is Australia's system for the identification and traceability of cattle, sheep and goats.
Image source: mla.com.au/extension-training-and-tools/give-goats-a-go-hub/goat-data-collation-and-tracking-project/

- Australia's goatmeat industry sustained high export prices from 2019 to the first half of 2022, consistently trading at higher rates

than lamb and mutton. However, as production ramped up to unprecedented volumes, prices experienced a correction. Goatmeat followed the trend of other proteins such as lamb and mutton, which also saw price softening due to higher production volumes.

Average Australian goatmeat and sheepmeat export price



Source: Trade Data Monitor (TDM), exports to all destinations

Exports

- Globally, Australia is a minor producer of goatmeat but the largest exporter, with a 55% volume share of global goatmeat exports in 2023. Australia's significance in the export market influenced the overall global export value, which fell to US\$367 million due to a correction in Australian export prices (Source: FAO). Australian goatmeat is almost exclusively (99%) exported as frozen whole carcase (Source: DAFF).
- Kenya overtook Ethiopia as the second-largest export country, driven by a combination of increased supply, expanded export capacity, and more competitive pricing. In contrast, Ethiopia's export volumes declined due to high domestic prices and a shortage of quality animals. However, Kenya and Ethiopia do not compete in the same markets as Australia, as their exports are primarily directed to African and Middle Eastern countries.

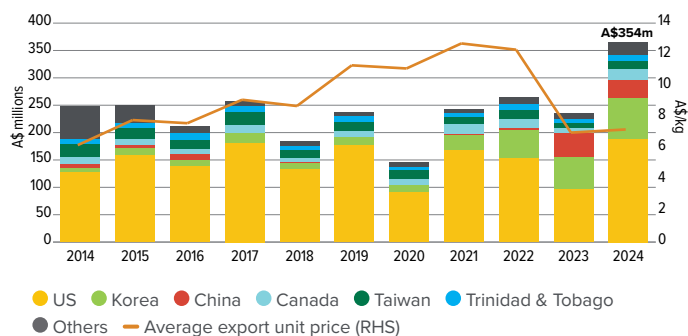
Top global goatmeat exporters by volume



Source: FAO, 2023

- In 2024, Australia recorded an impressive 51,489 tonnes shipped weight (swt) of goatmeat exports, the highest volume ever recorded, marking a 52% year-on-year growth. The surge in production coupled with competitive prices supported the growth. In 2024 Australia received \$354 million by exporting goatmeat, a 40% higher value than the previous export record set in 2022.
- The US is the largest single export market for Australia, averaging almost 60% volume share over the past five years. In 2024, 27,559 tonnes swt was shipped to the US, accounting for 54% of total export volume, the highest volume shipped to a single market.
- In 2024, South Korea's demand for Australian goatmeat grew further, rising 44% year-on-year to 8,639 tonnes. Exports to Korea experienced a 675% volume increase since 2020.
- Despite a 24% decline in 2024, Mainland China maintained strong demand following a surge in 2023, making it Australia's third-largest export market and accounting for 10% of total exports.
- Trinidad & Tobago imported 18% more Australian goatmeat in 2024 compared to 2023, becoming Australia's fifth largest goatmeat market. Other markets such as Taiwan and Canada increased demand for Australian goatmeat.

Australian goatmeat exports by value



Source: Trade Data Monitor (TDM)

Australian goat market summary

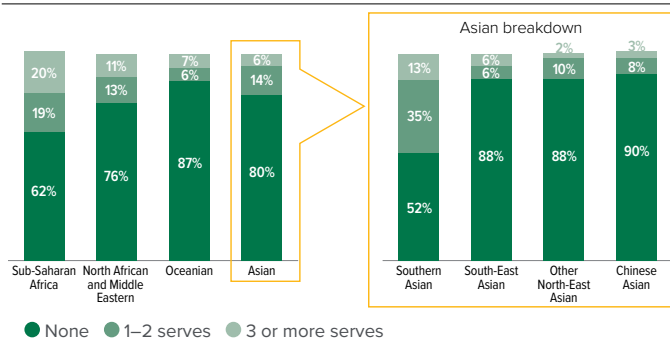
Calendar year	2023	2024	% change 2023–24
Slaughters ('000 head)	2,448	3,444	+41%
Average carcase weight (kg/head)	15.6	15.8	+1%
Production ('000 tonnes carcase weight)	36.8	54.0	+47%
Goatmeat exports ('000 tonnes swt)	33.9	51.7	+53%
Goatmeat exports (A\$ millions)	235.6	354	+50%
Live goat exports ('000 head)	18.3	14.7	-20%
Live goat exports (A\$ millions)	7.1	7.5	+6%

Sources: ABS, DAFF, Trade Data Monitor (TDM)

Australia – domestic market

- Goatmeat has relatively low consumer awareness and limited availability in Australia's major retail and foodservice channels. Historically, only about 9% of domestic production is consumed in Australia, with the rest exported.
- A survey of Australian consumers in 2018 found more than 25% of respondents listed unavailability where they shopped as the main reason they hadn't bought goatmeat. The expansion of goat-specific processing plants has provided a steadier volume and quality of supply, reducing challenges for foodservice and retail due to supply volatility. This should improve the consistent presence of goatmeat in these channels.
- Small, young Australian families consume somewhat more goatmeat meals than average, as do communities with particular ethnic backgrounds, such as South Asian.

Number of goatmeat serves* by ethnicity in Australia



Source: MLA Domestic Tracker 2024

*number of meals containing goatmeat in last 7 days

- In comparison to other proteins, goatmeat is less prevalent in Australian culinary repertoires. However, there has been a long, steady upward trend in the average goatmeat serves over the years (Source: MLA Domestic Tracker). The growing proportion of ethnic populations presents a long-term growth opportunity.

Melbourne Goat Trail

Many consumers may not realise Australia leads the world in goatmeat exports, as the idea of consuming goat as a protein source is unfamiliar to many. To help drive awareness and make it more accessible, Meat & Livestock Australia (MLA) is proud to share the 'Melbourne Goat Trail' as a key activity in 2025. Returning for a second year after last year's inaugural 'Sydney Goat Trail', this exciting initiative aims to drive awareness and accessibility for goatmeat. Customers and consumers are shown where to find and experience Melbourne's Goat Trail via an engaging 10-minute content piece (see link below). Host Sarah Tiong (two-time MasterChef contestant and co-owner of Ogni restaurant in Surry Hills) returns to take diners on a journey to five unique restaurants. Each venue presents the versatility of goatmeat, narrates the stories behind the dishes, and demonstrates how goat can be savoured across various cooking styles and cuisines.

Embrace the culinary adventure.

Give goat a go!

Watch the [trailer](#), or see the [full video](#).



Goat tacos



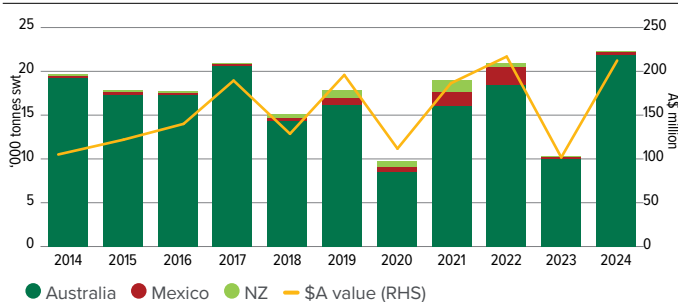
Goat adana skewer





- The US is Australia's single largest goatmeat export market. In 2024, exports surged by 90% year-on-year to an impressive 27,559 tonnes swt, the highest volume ever exported to a single market.
- Canada ranked among the top five export markets in 2024, with year-on-year growth of 112%, reaching a total of 2,632 tonnes swt.
- North America has been the largest market for Australian goatmeat for over two decades. This is set to continue and is driven by population growth, demographic change and evolving consumer tastes.
- To meet consumer demand during periods of low Australian exports, the US sources goatmeat from other countries such as New Zealand and Mexico. However, with the recovery of Australian exports over the past two years, Australia has reclaimed its dominant position in the import market, highlighting a clear preference for the quality, consistency, and competitive pricing of Australian goatmeat.

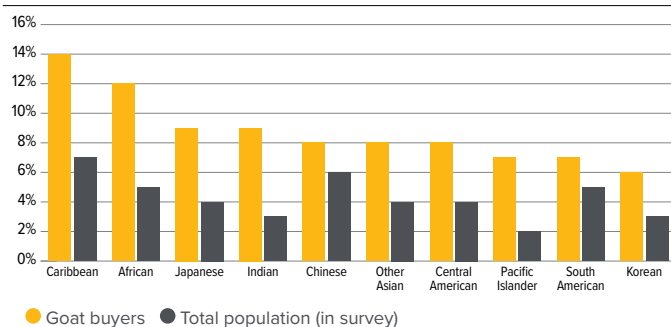
US goatmeat imports by supplier



Source: Trade Data Monitor (TDM) from US Census Bureau

- Canada has steadily increased its imports of Australian goatmeat since 2018. In 2024, it was the fastest-growing key market, becoming Australia's fourth-largest export destination, surpassing Taiwan for the first time. Canada also reached a record export value of A\$20 million in 2024.
- Although goatmeat consumption in North America is growing, as a niche protein it has relatively low awareness in consumers' minds, with lack of familiarity the main reason – having not grown up eating goat as a part of their protein repertoire, many don't know how to cook it.

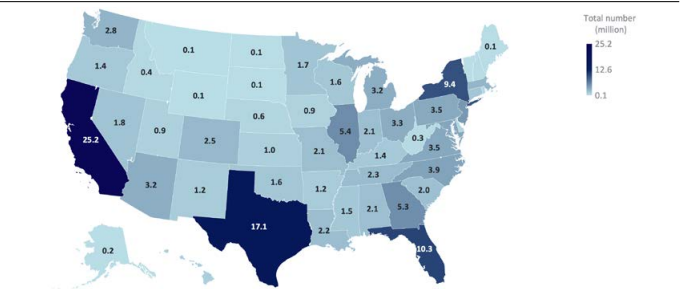
Ethnic background of US goatmeat buyers



Source: MLA Global Consumer Tracker 2023. Self-reported ethnic background.
Caution: indicative data – small sample sizes.

- Goatmeat buyers are more likely to have Caribbean, African, Asian, Pacific Islander and Central American cultural backgrounds, where goatmeat is part of traditional cuisines. It is also more frequently consumed by those who identify as Hindu and Muslim, with those consumers enjoying more than twice as many goatmeat meals per week than the country average (Source: MLA Global Consumer Tracker, 2023).
- Among some groups, goatmeat is seen as interchangeable with mutton and even lamb. A survey of menus featuring goatmeat indicates it often features in curries, stews and other slow-cook dishes and is frequently offered as a protein choice alongside lamb or beef. Cuisines that utilise goatmeat include Indian, Southern Asian, Caribbean, Mexican and Middle Eastern.

US population of Asian, Hispanic/Latino, Black or African Americans by state



Source: U.S. Census, 2020

- Cities with a diverse cultural mix and a higher concentration of populations from various ethnic backgrounds often exhibit higher demand for goatmeat. These groups often maintain their culinary traditions and preferences after migrating (Source: MLA Global Consumer Tracker 2023).
- While the US is the largest import market, goatmeat remains a niche protein that is gradually gaining popularity and awareness. As a result, it is becoming increasingly available through a wider range of retailers beyond ethnic markets and specialty butchers. Major supermarket chains such as Whole Foods and Safeway have begun stocking goatmeat, providing greater visibility for consumers.
- More frequent goatmeat buyers tend to be younger, affluent consumers looking for novelty, variety, healthiness and meat raised with high animal welfare standards (Source: MLA Global Consumer Tracker 2023).
- Goatmeat is gaining awareness through social media, with especially positive discussions among chefs who also share their views. Additionally, consumers are showing increased interest in health-related benefits, particularly regarding fat and cholesterol content and immunity-related functional benefits. This growing interest highlights the potential for goatmeat to become a more popular and appreciated protein option in the US (Source: Menu Matters).
- The majority of goatmeat entering the US is sold through foodservice. The inclusion of goatmeat on-menu increased over the past few years beyond fine dining, driven by growing interest from operators looking for something different to attract diners (Datassential Menu Matters 2022).
- As many consumers are still largely unfamiliar with goatmeat, some restaurants are using goat in familiar dishes such as grills, burgers and sandwiches to boost consumption. Goat is increasingly promoted as a 'new protein', similar to Wagyu beef, particularly in trendy restaurants and specialty grocery stores (Source: Datassential MenuTrends 2021).
- Foodservice trends in the US present a potential opportunity for expansion of goatmeat. There has been considerable growth in medium to high-end Indian restaurants nationwide, a cuisine well-known for its use of goatmeat. Increasing popularity of dishes that feature goat such as birria, are shifting the dial on demand.



Slow-braised Aussie goat empanadas

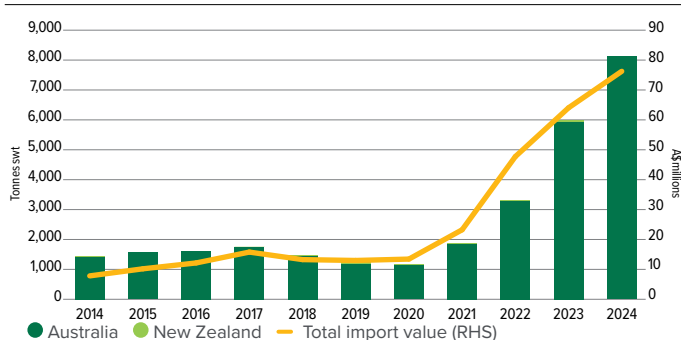


South Korea



- Despite being a niche protein, Korea has a long tradition of consuming goatmeat from both domestic and import sources. Korea has been a growing market for Australian goatmeat in recent years. In 2024, Australian goatmeat exports to Korea surged 44% year-on-year, setting a new record-high volume of 8,639 tonnes swt.
- Since 2020, imports have increased nearly eight-fold, positioning Korea as Australia's second-largest export destination. Australia remains the dominant supplier to the Korean market, although small volumes are also imported from New Zealand and Mongolia.
- For the fourth consecutive year, the value of Australian goatmeat exports to Korea reached a new record, rising by 20% in 2024 to A\$76.6 million. Reflecting strong demand, the average export unit price to Korea is the highest among Australia's major export markets (Source: Trade Data Monitor (TDM)).

Korean goatmeat imports



Source: Trade Data Monitor (TDM)

- Korean consumers' increasing interest in maintaining overall health has been growing demand for food with medicinal properties. Although goatmeat is not a common protein in daily diets, it is consumed by many older Koreans for health benefits. It is typically consumed more during the *Sambok* period (the hottest days of summer from mid-July to mid-August) in the popular dish *Yeomso Tang* (goatmeat stew). Furthermore, a recent trend to use goatmeat in health and immunity-boosting dishes has further boosted demand for Australian imports.
- Increased interest in health has also grown demand for goat extract ingredients. High and rising prices of local black goats used for medicinal purposes had the effect of increasing demand for alternative imported product, mainly from Australia, and recently canned black goat from Mongolia. In Oriental medicine, goat extract is associated with functional health benefits such as stamina and revitalisation of the body.
- Korea is a fast-paced dynamic market with several players seeking to capitalise on the growing goatmeat demand. The sustained growth of Australian exports improves availability, enabling restaurants and retailers to confidently expand their protein offerings and introduce a wider variety of goatmeat products.
- Korean consumers prefer skin-on goatmeat, which is typically served in specialised restaurants and in wet slow-cook dishes such as stews and soups. However, the rising popularity of goatmeat, coupled with consumers' limited knowledge of its preparation, has created a market opportunity for more convenient and accessible goatmeat products.



Korean goatmeat soup

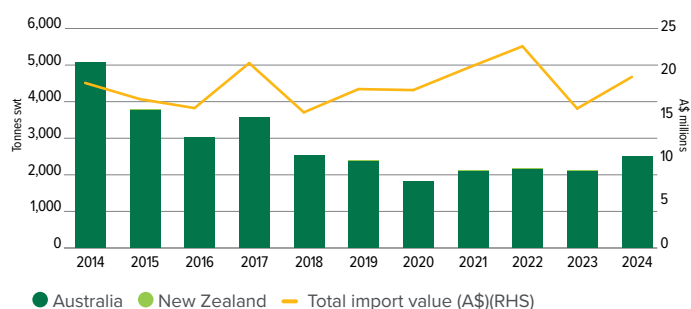
China Mainland

- Following a surge in Australian exports to Mainland China in 2023, volumes declined by 24% to 5,161 tonnes swt in 2024, positioning China as Australia's third-largest export market after the US and Korea. However, from the late 2024 into early 2025, demand has been rising, with China importing higher monthly volumes than Korea. This growth has been driven primarily by competitive pricing compared to local products, supported by zero tariffs under the China-Australia Free Trade Agreement which has been in effect since 1 January 2023.
- China stands as the world's leading global producer of goatmeat, with the majority consumed domestically. Within the country, goatmeat has tended to be more popular in the colder northern region of the country as well as in some southern provinces such as Fujian.
- In China, goatmeat is known as a nutritious and 'warming' meat, with consumption tending to be occasional and seasonal, and traditionally prepared skin-on in dishes using slow wet cooking methods.
- Foodservice remains the primary channel through which consumers enjoy goatmeat. However, importers are increasingly distributing Australian goatmeat through retailers in second-tier cities, with gradual expansion into larger cities such as Shanghai.
- In 2025, China approved more Australian processing establishments for chilled and frozen exports, unlocking further growth opportunities in this large market.

Taiwan

- Taiwan has been a major long-standing market for Australian goatmeat. However, since peaking in 2014, import volumes declined up to 2020. Since then, import volumes have been gradually increasing at around 8% annually, reaching 2,511 tonnes swt in 2024. Australia supplies nearly all of Taiwan's goatmeat imports, with New Zealand acting as a minor supplier.
- In 2024, total goatmeat imports were valued at A\$19 million. Over recent years, the value has remained relatively stable compared to other key markets, fluctuating between A\$15 million and A\$22 million. This consistency reflects steady demand, despite global variations in supply and pricing.
- It is estimated that imported goatmeat accounts for about two thirds of domestic consumption. Goatmeat is shipped to Taiwan as frozen skin-on carcasses, processed in market and sold with the skin on.
- Identified as a 'warming tonic' food due to its ability to strengthen and warm the body, goat is typically served in specialised restaurants during winter in traditional slow-cook dishes such as herbal stews and hotpots.
- There is low awareness of the difference between goatmeat and mutton, as the same term is commonly used for both. As a result, consumers often interchange the two, depending on price and availability.

Taiwan's goatmeat import volume and value



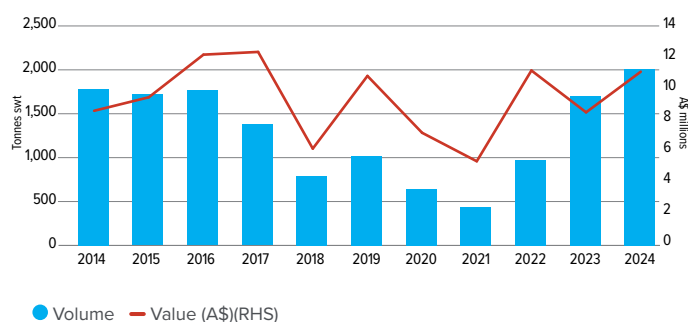
Source: Trade Data Monitor (TDM)





- According to the FAO, the Caribbean region had a domestic goat flock of 3.4 million in 2023, producing an annual volume of 13,500 tonnes of goatmeat. Goatmeat is enjoyed across the region, often in the form of a traditional Indo-Caribbean goat curry served with roti, or in a roti wrap, which is a popular street-food.
- Despite Trinidad & Tobago (T&T) having only 0.4% of the total Caribbean flock, it has been the region's largest goatmeat exporter. The twin islands located just off the northeast coast of Venezuela in the Lesser Antilles are a major financial centre in the Caribbean and Australia's largest trading partner in the region.
- Australia has exported goatmeat to T&T for decades, contributing to red meat being Australia's largest value export to the market. In 2024, the Caribbean region imported 2,806 tonnes swt of Australian goatmeat, with T&T accounting for 72% of the total.

Australian goatmeat exports to Trinidad & Tobago



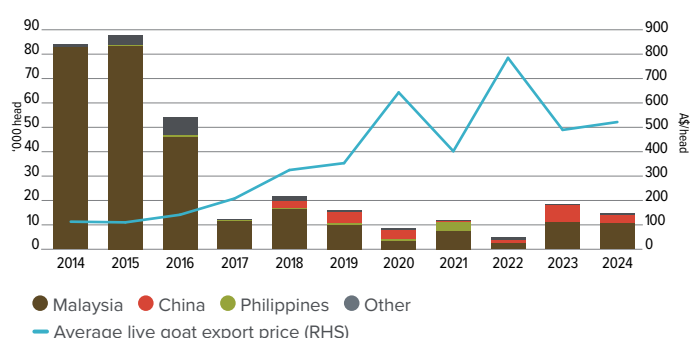
Source: DAFF, Trade Data Monitor (TDM)

- In 2024, Australia exported 2,008 tonnes swt of goatmeat to T&T, marking an 18% increase on 2023, growing for the second consecutive year. The 2024 volume is the second highest on record after 2009, valued at more than A\$11 million.
- T&T consumers have a preference for locally-produced, fresh goatmeat, with demand surging during cultural and religious festivals and celebrations. However, despite this preference, local production struggles to compete with imported products in terms of price and volume.

Live exports

- Australia's total live goat export volume declined 20% in 2024, while total value increased 6% year-on-year to total A\$7.5 million.
- Demand for live goats is influenced by export prices, as many markets are price-sensitive. However, export volumes tend to correlate more closely with sheep prices, as consumers often switch between the two species depending on price. In 2024, slaughter goat prices to Malaysia were lower than those for sheep, which favoured demand for goats.
- Malaysia and China are Australia's top live goat export destinations. Malaysia imports mostly slaughter animals while China imports breeders.
- Historically, Malaysia has been the largest export market for Australian live goats. The increase in supply has made live goats more competitive compared to local animals and imported mutton, in-turn increasing volumes over the last two years. While consumers prefer goatmeat for its leanness, sheepmeat can be used interchangeably with goatmeat in many Malaysian dishes when goatmeat prices become too high.
- Malaysia's demand significantly influences Australia's total live goat exports, being the leading destination. In 2024, Malaysia's imports softened 4% year-on-year, to a total of 10,632 head. The majority of these imports were for slaughter purposes, while breeders constituted 9% of total imports in 2024.
- In 2024, the 51% year-on-year decline in exports to China impacted the overall exported volume. This market holds the title of Australia's largest market for breeder goats, valued at A\$4.7 million in 2024.

Australian live goat exports



Source: Volume – ABS (2010–14), DAFF (2015–24)
Value: Trade Data Monitor (TDM)/ABS



	Trade agreement			Import tariffs	Technical access		
North America	US – Australia-United States Free Trade Agreement (AUSFTA)	Canada – CP-TPP	Mexico – CP-TPP	Baseline tariff of 10% introduced by the US administration in April 2025		US – issues include port mark compliance	Mexico – flat stacking of carcasses
Greater China	China mainland – Australia Free Trade Agreement (ChAFTA)	Taiwan – no free trade agreement		China mainland Goatmeat – 0% since Jan 2023 Live goats – 0% since 2019	Taiwan – NT\$11.30/kg or 15%, whichever is whigher		
Korea	Australia Free Trade Agreement (KAFTA)			0% for goatmeat and live milk goats since Jan 2023			
Trinidad & Tobago	No free trade agreement			0% (under Common external tariff of the Caribbean Community (CARICOM CET))			
Malaysia	ASEAN-Australia-New Zealand Free Trade Agreement (AANZFTA) and Malaysia-Australia Free Trade Agreement (MAFTA)			0% (for meat of goat and live goat)		Maintains import regulations in accordance with Halal labelling requirements	
United Kingdom	A-UK FTA			Frozen Carcasses From 1 Jan 2025 – 7.50% + 66.87 GBP/100kg From 1 Jan 2026 – 6.0% + 53.50 GBP/100kg			

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

Australian goatmeat – summary table

Volume – tonnes shipped weight		2024	% out of total	2023	% out of total	5-year average (2020–2024)	% out of total	Change 2024 vs 5-yr av.	
								%	in tonnes swt/A\$
Total		51,489	100%	33,891	66%	28,081	100%	83%	23,408
Storage	Chilled	6	0.01%	27	0.1%	11	0.04%	-44%	-5
	Frozen	51,482	100%	33,864	66%	28,070	100%	83%	23,413

Source: DAFF

Value – in A\$ '000								%	in A\$ '000
Total		364,024		235,645		249,278		46%	114,746

Source: Trade Data Monitor (TDM)

Australian goatmeat exports – volume (tonnes swt)								%	in tonnes swt/A\$
US		27,559	54%	14,477	28%	15,134	54%	82.1%	12,426
China Mainland		5,161	10%	6,757	13%	2,504	9%	106%	2,657
South Korea		8,639	17%	5,994	12%	4,327	15%	100%	4,313
Taiwan		2,591	5%	2,003	4%	2,129	8%	22%	462
Trinidad & Tobago		2,008	4%	1,697	3%	1,152	4%	74%	856
Canada		2,632	5%	1,243	2%	1,488	5%	77%	1,143
Other		2,899	6%	1,719	3%	1,347	5%	115%	1,551

Source: DAFF

Australian goatmeat exports – value (A\$ '000)								%	in tonnes swt/A\$
US		188,252	52%	96,287	41%	138,984	56%	35%	49,268
South Korea		73,554	20%	59,251	25%	45,010	18%	63%	28,544
China Mainland		33,754	9%	43,642	19%	16,750	7%	102%	17,004
Taiwan		14,954	4.1%	8,917	3.8%	14,122	6%	6%	832
Canada		20,042	5.5%	8,554	3.6%	14,507	6%	38%	5,535
Trinidad & Tobago		11,178	3.1%	8,583	3.6%	8,756	4%	28%	2,422
Other		22,290	6.1%	10,410	4.4%	11,150	4%	100%	11,140

Source: Trade Data Monitor (TDM)

Australia live goat exports total								%	in tonnes swt/A\$
Total volume in head		14,749		18,356		11,678		26%	3,071
Total value A\$ '000		7,492		7,077		5,656		32%	1,836
Malaysia	volume in head	10,632	72%	11,043	60%	6,965	60%	59%	3,667
	value A\$ '000	1,766	24%	1,380	19%	1,455	26%	-5%	311

Source: DAFF (volume); Trade Data Monitor (TDM) (value)