



# Final report

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## From grid to consumer: Phase one Key consumer value attributes of goatmeat communicated to producers

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## Abstract

Australian goat producers and supply chain partners better understand how consumer expectations, market requirements, and supply-chain processes influence the value of goat meat thanks to the From Grid to Consumer Webinars series. The webinars translated insights from processors, retailers, chefs, market analysts and international buyers into practical, on-farm knowledge, giving producers clearer direction on how to supply goats that meet the needs of domestic and export markets. Across the three webinars, 136 people registered, 56 attended live, and more than 460 viewed the online recordings (within 3 months of recordings posted), indicating strong industry interest in consumer-focused production. Live webinar participants represented producers, processors, researchers, consultants, and veterinarians from across Australia, with additional international engagement from New Zealand and the United Kingdom.

The webinar series showed that demand for goat meat is growing, driven by health-conscious consumers, multicultural communities, value-added food service products, and international diners looking for lean, consistent carcasses. Clear messages highlighted the importance of producing goats within a defined weight range, fat cover, and conformation to meet various market needs. Case studies were developed based on 40 supply chain interviews, highlighting how better communication, consistent supply, and a clearer understanding of processor requirements can boost market confidence and reduce inefficiencies across the goat supply chain.

The project delivered immediate benefits by helping producers understand what consumers value, which is consistency, sustainability, convenience, and quality, and how these preferences translate into tangible market opportunities and demand. It strengthened connections across the value chain, encouraged processors and wholesalers to communicate clearer specifications, and highlighted emerging domestic opportunities for value-added products. A review of MLA-funded goat research and market development projects (2015–2025) supported these findings, showing progress in genetics, reproduction, carcass traits, and supply chain efficiency, while also identifying gaps in nutritional guidelines, economic modelling, and domestic market development.

Future work should focus on enhancing feedback flow throughout the supply chain and supporting processors and wholesalers in innovating and diversifying their product offerings. Ongoing extension efforts through workshops, digital content, case studies, and updated resources on MLA's Goats Hub will help producers apply consumer-focused production principles. A coordinated supply-chain approach, backed by research and practical tools, is required to ensure a profitable, sustainable, and consumer-aligned goat meat industry in Australia.

## **Executive summary**

### **Background**

This project aimed to help Australian goat producers better understand consumer preferences and how these needs influence the goat meat supply chain. The main goal was to demonstrate to producers why specific carcass traits, weights, and quality attributes are important to buyers, processors, chefs, and customers in Australia and overseas. Through a series of webinars and producer awareness materials, insights from this project will assist producers in making on-farm decisions that boost returns, expand market access, and strengthen information sharing along meat goat supply chains.

### **Objectives**

The primary objective of this project was to identify key attributes that Australian and international goat meat consumers value and communicate these attributes to Australian goat producers. Specifically, share insights from key in-market customers and consumers with Australian goat producers.

These objectives were achieved through a three-part webinar series (recordings available on the MLA Goats Hub website) and accompanying project awareness material that highlights what different goatmeat markets are looking for in terms of goat carcass and meat attributes and how producers can position their goats to meet market demand.

### **Methodology**

The project delivered three producer-focused webinars featuring market experts, processors, chefs, and leading goat producers. The webinars combined industry data, case studies, firsthand supply chain experience, and producer Q&A to give practical, easy-to-understand insights. Engagement data, registration demographics, and knowledge surveys were collected to inform the final report. Additional awareness material in the form of fact sheets summarising the findings of the webinars were prepared to facilitate extension of the messages to goat producers.

### **Results/key findings**

The project showed that demand for goat meat is growing, especially among health-conscious consumers, multicultural households, and food-service markets. Producers learned how carcass traits such as weight, fat cover, age, and overall consistency directly affect prices and market suitability. The findings also showed that clearer communication between producers and processors leads to better alignment and more stable supply opportunities.

### **Benefits to industry**

For producers, the project helped clarify what markets really want and how to produce goats that consistently meet those expectations. This can improve price and support better long-term planning. By aligning production with demand, producers strengthen relationships with processors and buyers, opening the door to more customers such as food service who require product consistency and continuity in supply.

### **Future research and recommendations**

Practical tools that help producers achieve consistent carcass traits, understand market specifications, and plan turn-off more efficiently would continue to support the work initiated in this

project. Research into nutrition, particularly supplementation and spike feeding as well as management of production systems like controlled mating will help producers lift productivity and meet the needs of premium domestic and export markets. Continued extension activities such as targeted workshops, case studies, and supply chain feedback will keep producers informed and supported.

## Table of contents

<b>Abstract .....</b>	<b>2</b>
<b>Executive summary .....</b>	<b>3</b>
<b>1. Background .....</b>	<b>9</b>
<b>1.1 Meat goat supply chain development.....</b>	<b>9</b>
1.1.1 Previous projects .....	9
1.1.2 The purpose of this project.....	10
<b>2. Objectives.....</b>	<b>11</b>
<b>3. Methodology .....</b>	<b>12</b>
<b>3.1 Planning for the Webinar series .....</b>	<b>12</b>
3.1.2 Develop topics for the webinar series.....	12
3.1.3 Develop MER and engagement plan for producer and stakeholder webinars and case studies for MLA approval. ....	12
3.1.4 Develop a timeline for delivery of webinars and case studies .....	12
<b>3.2 Conduct webinars for goat meat producers and other industry         stakeholders.....</b>	<b>13</b>
3.2.1 Webinar topics .....	13
3.2.2 Speaker Recruitment: .....	14
3.2.3 Communication and promotional materials.....	14
3.2.4 Webinar Survey Information:.....	15
3.2.5 Monitoring, Evaluation, Reporting (MER) and engagement plan for producer and stakeholder webinars and case studies .....	15
<b>4. Results .....</b>	<b>16</b>
<b>4.1 Key performance and metrics from the three webinars.....</b>	<b>16</b>
4.1.1 Webinar registration.....	16
4.1.2 Social media interactions.....	16
4.1.3 Webinar registrants' demographics .....	17
<b>4.2 Summary of the topics covered in the three webinars.....</b>	<b>19</b>

4.2.1	Webinar 1 – Global Flavours, Australian Goats: Exploring Consumer Preferences, Markets, and Culinary Diversity.....	19
4.2.2	Webinar 2 – From Farm to Fork: Aligning Carcase Traits with Consumer Demand.....	21
4.2.3	Webinar 3 – Aligning the Goatmeat Value Chain with Consumer Preferences	24
<b>4.3</b>	<b>Survey insights from three webinars and recommendations .....</b>	<b>26</b>
<b>4.4</b>	<b>R&amp;D summary of meat goat research and link to the goal of developing the sustainable, consumer-oriented goat meat supply chain .....</b>	<b>28</b>
<b>5.</b>	<b>Conclusion .....</b>	<b>31</b>
5.1	Key insights from the Webinars.....	31
5.2	Benefits of the project to industry.....	31
<b>6.</b>	<b>Future research and recommendations.....</b>	<b>32</b>
6.1	Key recommendations .....	32
6.2	Recommended next steps.....	33
<b>7.</b>	<b>References.....</b>	<b>34</b>
<b>8.</b>	<b>Appendix .....</b>	<b>35</b>
8.1	Appendix A – R&D Review References .....	35

**List of Tables**

Table 1: Webinars registration, attendance and views ..... 16  
Table 2: Summary of the survey questions asked in surveys across the webinars..... 26

## List of Figures

Figure 1: Webinars promotional flyers.....	14
Figure 2: Social media posts promoting the webinars .....	15
Figure 3: Webinar registrants age brackets.....	17
Figure 4: Geographical locations of webinars registrants .....	18
Figure 5: Occupations of webinars registrants .....	19
Figure 6: Familiarity with consumer protein trends.....	27
Figure 7: Understanding of food service buyers' requirements .....	27

## 1. Background

### 1.1 Meat goat supply chain development

#### 1.1.1 Previous projects

The meat goat industry has undertaken projects to improve productivity, genetics, and reproductive performance. However, the Australian goat industry is susceptible to highly variable boom-and-bust pricing due to supply and demand volatility, which directly impacts on-farm profitability.

Underpinning profitability in the meat goat industry will give producers the confidence to invest in on-farm infrastructure that supports their productivity goals. Currently, producers base their enterprise decision-making on a price-oriented grid set by processors. Yet they are unaware of the target market for their goatmeat product i.e., the product's destination market. Consumers are increasingly focusing on the unique value propositions of goat meat, such as being a 'free from', high-protein, low-fat, versatile product in a ready to cook form.

There have been multiple benchmarking projects funded through Meat & Livestock Australia Donor Company (MDC) that focus on improving the productivity of goat producers and on better understanding the opportunities in marketing goat meat.

- a) P.PSH.1453 - The [Measured Goats](#) project which is being implemented in partnership with New South Wales Department of Primary Industries, is building a reference herd of around 1,000 does and thousands of kids at a research station to collect detailed performance, genomic and carcass data. The goal is to develop reliable breeding values, genetic tools and best-practice standards so goat producers can select and breed animals that grow faster, reproduce better and perform well in market-focused supply chains.
- b) P.PSH.1373 - [Kids+](#) is another MDC in partnership with the University of Queensland. The project is focusing on quantifying the reproductive performance in goats to increase productivity and profitability on-farm. The project aims to help benchmark reproductive performance of goats across a range of management systems to further understand goat reproductive performance and opportunities for productivity improvements. The project works with producers across Australia to collect on-farm data about does, bucks, and kids — including body condition, pregnancy results, kidding, and growth. By looking at this information, the project is working out what practices make the biggest difference to herd fertility and kid survival.
- c) [P.PSH.1461](#) - Developing a sustainable high-value market driven goat supply chain was an MDC project conducted in partnership with Greenleaf Enterprises Pty Limited. It was undertaken to understand the international and domestic demand for goat meat products, as well as the technical trade barriers for new and existing products and markets. Market opportunities and the required supply chain interventions to develop value-added goat meat products were identified. Key findings from this project were that there is potential to develop value-added products and to continue supplying existing markets.

An irregular supply base means processors are unable to sign more lucrative, longer-term supply contracts and develop high-margin markets. Flow-on effects include boom-and-bust cycles of oversupply and low prices, with spot market buyers trading off against mutton

prices. This project highlighted that Innovative supply solutions, combined with new product and market development, provide an opportunity to break the commodity boom-and-bust cycles. Markets exist for cubed products, grilling and roasting cuts; however, the following factors have meant processors have maintained the status quo, selling frozen carcasses or carcasses cut into six pieces known as 6-way:

- A lack of goat dedicated processing technology
- High processing costs per kilogram of meat sold
- Workplace health and safety issues on bandsaws
- Limited market development.

The project concluded that understanding value attributes across markets and aligning the supply chain to meet consumers' needs, combined with innovation in processing, are required to develop a sustainable, high-value, market-driven supply chain.

- d) [P.PSH.1500](#) - Growing value and market share in North America for Australian goat meat producers was an MDC project conducted in partnership with Thomas Foods International (TFI). This project developed a market development strategy and the capabilities, capacity, and relationships required to develop and deliver value-added goatmeat products into retail and foodservice channels.

Key findings from this project were that goat is a traditional dish in Mexican cuisine, and that quick-service restaurants offer an opportunity to add value to goat meat from Australia. Goat is a traditionally consumed protein, with consumption increasing during the winter. The goat cuts with the highest demand include legs, cubed, and boneless products. Goat is frequently substituted for mutton in Indian-based dishes, and by some consumers; thus, the price differential between mutton and goat influences demand for goat meat.

Research findings from this project identified that Goat has in-demand consumer attributes but requires a marketing message to raise the profile, including high protein, low cholesterol, low fat, free range (natural) product that is free from GMOs, HGPS and antibiotics.

### **1.1.2 The purpose of this project**

This Grid to Consumer webinar series was implemented to support the goat meat producers and processors in Australia to better understand what markets exist, what consumers are looking for and how best to align the production practices with different market segments. Greenleaf worked with the MLA team to provide a series of three webinars and extension materials for goat meat producers and industry stakeholders. Developing customer-focused goat meat production will:

- Optimise alignment between production, processing and customer needs and wants.
- Enable feedback from the customer to the processor and producer to support decisions on farm and in the processing plant.
- Help position goat meat as a premium niche protein for the 'conscious consumer'. The goal is to have a more satisfied consumer who increases the number of goat meat purchases they make per month

In the longer term, creating and maintaining unique value propositions and communicating these to the customer and consumer will help change the price-based focus to value propositions such as

convenience, health, environmental sustainability and flavour. The shift away from a price based focused will only be possible when:

1. Consumer value attributes in each market are clearly articulated
2. The entire supply chain works together to align and communicate these value attributes ensuring right product at the right place for the target consumer to maximise value creation for the supply chain.

Connecting the consumer drivers backwards through the supply chain to on farm will help build transparency in different markets drivers influencing carcass traits and on farm goat requirements. Different goatmeat customers want different flavour profiles: some cultural cuisines, like Jamaican dishes, prefer a strong gamey flavour, while many chefs want mild, sweet meat to absorb the flavours added to the goat dish. Goat is valued by chefs because it absorbs flavours well and has a unique mouthfeel (due to fat melting point and leanness). These clear differences in consumer preference show the need for more work on how producers can grow goats that fit specific supply chains and meet market demand.

This gap in understanding was identified by the Goat Industry Research, Development and Adoption Committee as a FY25 levy priority and this project was endorsed by GIRDAC and contracted by MLA.

## 2. Objectives

The primary objective of this project is to identify key attributes that Australian and international goat meat consumers value and communicate these attributes to Australian goat producers. Specifically, the project aimed to:

- a) Develop an understanding at a producer level of what a consumer-oriented goat meat supply chain means.
- b) Share insights from key in-market customers and consumers with Australian goat producers.
- c) Develop industry linkages with stakeholders working in the Australian goat meat industry who understand value creation opportunities and consumer-focused value chains (extension officers, researchers, industry bodies, industry leaders)

The objectives of the project were successfully achieved through the delivery of the three-part [“Consumer to Grid” Goat Webinar](#) Series which effectively translated consumer and market insights into practical knowledge for producers and industry stakeholders. The webinars enhanced producer understanding of what a consumer-oriented goat meat supply chain entails, and shared insights from key markets and customers. Collectively, these activities met the project’s goal by increasing awareness of value-creation opportunities and fostering collaboration across the Australian goat meat supply chain.

## **3. Methodology**

### **3.1 Planning for the Webinar series**

#### **3.1.1 Project commencement meeting with MLA**

A project commencement meeting was held with MLA to align expectations, clarify project deliverables, and discuss activity timelines.

#### **3.1.2 Develop topics for the webinar series**

The project commenced by identifying suitable webinars and case study participants through compiling a list of key stakeholders in the goat meat industry. This preliminary list includes commercial goat producers, processors, researchers, butchers, exporters, and representatives from industry associations. These stakeholders formed the core audience for the planned producer and industry stakeholder webinars and served as potential contributors for case study documentation.

#### **3.1.3 Develop MER and engagement plan for producer and stakeholder webinars and case studies for MLA approval.**

An MLA MER and engagement plan was developed and used throughout the project to record the project's performance measures. The plan outlined the key engagement objectives, target metrics, and evaluation tools to assess the success and effectiveness of the webinars and case studies throughout the project.

#### **3.1.4 Develop a timeline for delivery of webinars and case studies**

A project timeline was developed to guide the staged delivery of webinars and case studies throughout the project. This timeline outlined the main deliverables, proposed dates, and responsibilities for both MLA and Greenleaf as the project implementing partners.

## **3.2 Conduct webinars for goat meat producers and other industry stakeholders**

### **3.2.1 Webinar topics**

The topics for the three webinars were agreed, with emphasis on a common focus on communicating to goat producers the attributes of goat meat that customers and consumers seek, and on how producers can play a part in delivering those attributes in collaboration with the rest of the supply chain. The topics for the three webinars that were agreed to be delivered are listed below.

#### **Webinar 1: Global flavours, Australian goats: Exploring consumer preferences, markets and culinary diversity.**

This webinar was delivered on 16th September 2025 from 12:00 pm to 1:30 pm AEST.

This webinar followed the journey of Australian goat meat to a range of markets to better understand the key attributes consumers, chefs, and customers are looking for. It explored international and domestic goat meat sales, substitutions, competitors, and the customers and consumers. Goat meat is the preferred protein in some cultures and cuisines, and it is in demand by chefs. Product consistency, quality and year-round supply are often touted as necessary to grow the value of goat meat.

#### **Webinar 2: From Farm to Fork: aligning carcass traits with consumer demand.**

This webinar was delivered on 16th September 2025 from 12:00 pm to 1:30 pm AEST. The focus of this webinar was to communicate the importance of better aligning the carcass and cut quality aspects with the culinary application, which will improve consumer satisfaction with a case study presented from Thomas Foods International USA. The Australian goat has an extensive range of culinary uses, with a cooking demonstration with TFI USA head chef preparing goat from slow-cooked bone-in cuts to curries, roasts, and grilled chops. Consumers are willing to pay more when they are consistently guaranteed a product quality standard, and this webinar aimed at communicating this to producers and across the supply chain.

This webinar presented various domestic goatmeat supply chain case studies from producers to consumers, highlighting how each stage shapes product value, quality, and market success. Since the value is created by what the consumer is able and willing to pay for, this webinar also unpacked the costs of creating and adding value across the chain, and how the chain can work together to minimise costs and optimise value creation for the entire chain.

#### **Webinar 3: Aligning the Goat Meat Value Chain with Consumer Preferences.**

This webinar was delivered on 14<sup>th</sup> October 2025 from 12:00 pm to 2:00 pm AEST. The focus of this webinar was to explore and communicate the latest trends in protein consumption, including where goat meat fits within evolving consumer preferences of health, sustainability and convenience, and how these are shaping consumer buying habits with presentations from MLA Market insights team. The webinar also looked at domestic and international opportunities for goat meat, including institutional catering, and at the supply, quality, and presentation requirements to meet the needs of large-volume institutional buyers. Two producer case studies were presented including Grassland Goats vertically integrated supply chain and a rangeland producer from Western Queensland.

### 3.2.2 Speaker Recruitment:

Based on the agreed topic for each webinar, Greenleaf recruited prospective speakers to ask for their willingness and availability to present at each webinar. MLA also supported by reaching out to its network of speakers to identify suitable presenters.

### 3.2.3 Communication and promotional materials

Webinar communication and promotional materials were created, approved by MLA and shared with the public to promote the webinars. The Zoom registration link was embedded in the promotional flyer for each webinar and also shared with the contact list created in collaboration with MLA and GIRDAC, as well as with all registrants of webinar 1 (for webinars 2 and 3). Below are some of the promotional materials used for the webinars.

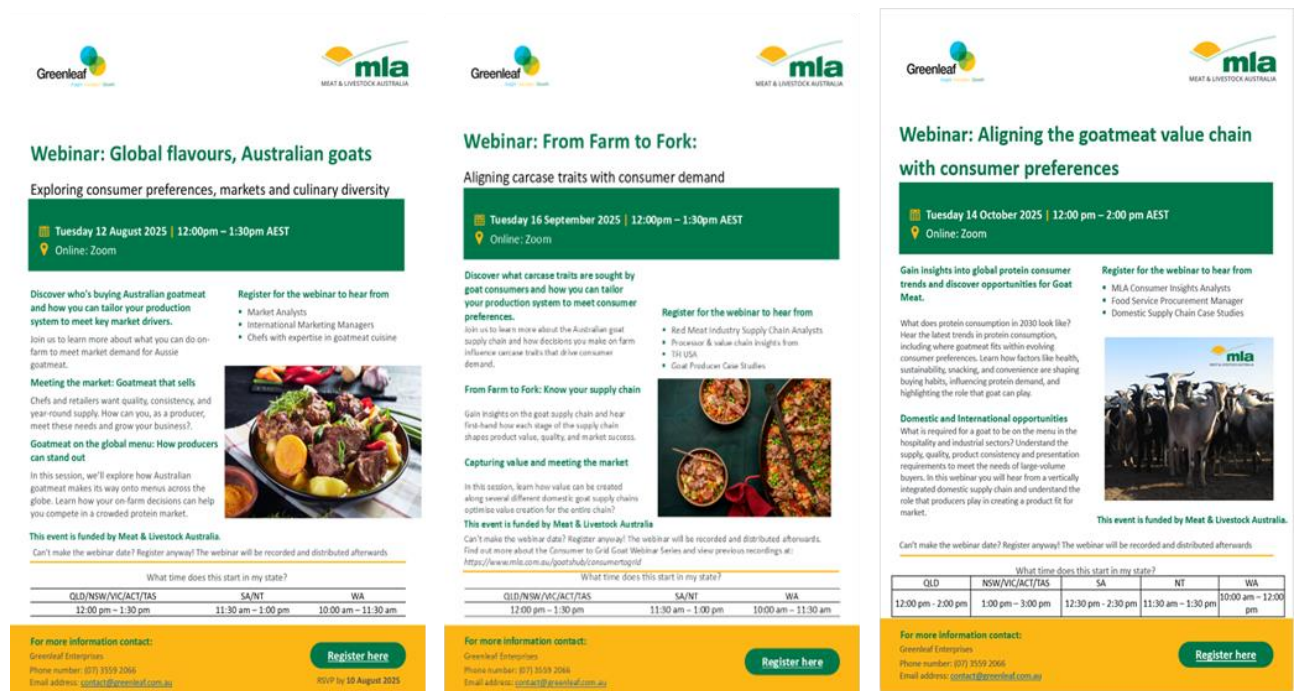
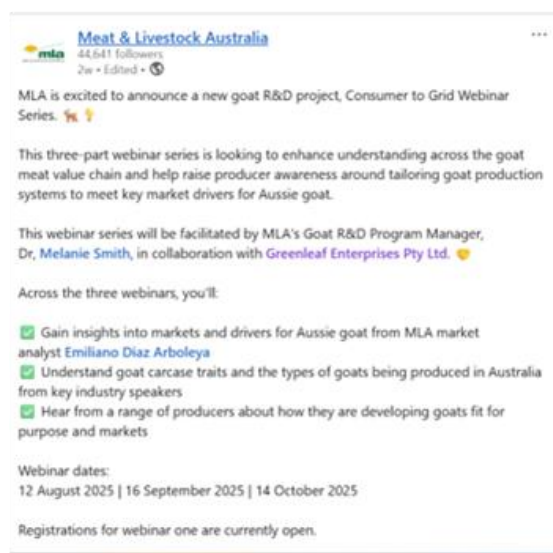


Figure 1: Webinars promotional flyers



Webinar 1 Facebook post



Webinar 1 LinkedIn post

Figure 2: Social media posts promoting the webinars

### 3.2.4 Webinar Survey Information:

For each webinar, Greenleaf developed pre- and post-webinar survey questions. The pre-webinar survey aimed at assessing the baseline knowledge and expectations, which was to help measure learning outcomes post webinar. They were also valuable in understanding the demographics of the registrants and their roles in the goat meat industry.

A post-webinar survey was circulated at the end of the webinar and focused on evaluating the impact of the webinars. It measured how well the webinars met participants' expectations and whether the learning objectives were achieved. It also gathered feedback on the quality of the content, the relevance of the information presented, and the effectiveness of the speakers. This feedback was crucial for improving future webinars, identifying topics of interest, and determining whether participants are likely to apply what they learned. Together, these surveys provided a complete picture of participant engagement, learning, and satisfaction.

The pre- and post-webinar survey questions were sent to MLA for review and approval before they were shared with the public. Since the Zoom webinar platform does not allow surveys, the links to pre-webinar surveys were shared from another platform where surveys were built.

### 3.2.5 Monitoring, Evaluation, Reporting (MER) and engagement plan for producer and stakeholder webinars and case studies

The MER plan specified how data would be captured on participant numbers, demographics, knowledge uptake, and topics of interest. It included a framework for continuous monitoring of the project, with periodic updates made based on insights gained from participant feedback, pre-and post-webinar surveys, and engagement analytics.

All three webinars were recorded, and the recordings were shared with everyone who registered for each of the webinars, both attendees and non-attendees. The recordings are also housed on MLA's Goats Hub Consumer to Grid website for future access, <https://www.mla.com.au/goatshub/consumertogrid>, and are available on MLA's YouTube channel. The summaries of insights and data captured for each of the three webinars are presented in the results section.

## 4. Results

### 4.1 Key performance and metrics from the three webinars

The three-part webinar series provided Australian goat producers with practical insights on how evolving consumer preferences, market trends, and supply chain dynamics are shaping opportunities for goat meat domestically and internationally.

#### 4.1.1 Webinar registration

A total of 136 people registered for the three Webinars, of whom 56 attended the live session (41%). The YouTube webinar recording has 248 views as of 30 October 2025.

The webinars were designed to help producers understand their role in driving value creation. The sessions highlighted how on-farm decisions from animal management to carcass quality influence product positioning, competitiveness, and profitability across the supply chain. Through expert presentations and case studies, the webinars demonstrated how producers can work alongside processors, marketers, and institutional buyers to meet consumer demand, strengthen market access, and create value for the entire industry. The table below summarises the Webinar registration, attendance, and YouTube for the three webinars.

Table 1: Webinars registration, attendance and views

	Total registered	Total attended live	YouTube views 30 Oct 2025
Webinar 1	49	26	157
Webinar 2	43	13	102
Webinar 3	44	17	10
<b>Total</b>	<b>136</b>	<b>56</b>	<b>248</b>

#### 4.1.2 Social media interactions

The webinar promotions across MLA social media platforms attracted engagement from the public, which highlights the value people put in the webinar series, as shown by the metrics below.

- **MLA Facebook Consumer to Grid Promotion:**
  - 25 likes
  - 2 comments
  - 4000 views
  - Engagement rate (per impression): 3.3%
  - Impressions: 3,273
  - Engagements: 109
- **LinkedIn Consumer to Grid Promotion:**
  - Engagement rate (per impression) 5%
  - Impressions: 3,047
  - Engagements: 151
  - Likes: 43

### 4.1.3 Webinar registrants' demographics

The demographic insights for all three webinars (combined results) are outlined below, with detailed reporting for each session provided separately. The insights were collected through the pre- and post-webinar surveys that were completed for each webinar; hence, the numbers might not reflect the total number of registrations.

While demographic data were collected for live webinar participants, it was not possible to capture demographic metrics for individuals who viewed the recorded sessions. However, viewing data were tracked, and the total number of recording views has been reported in Table 1 to indicate continued engagement with the content following each live event.

#### Age of webinar registrants

The registrants of the three webinars span across all ages with most of them coming from the 26-45 years as shown in the graph below.

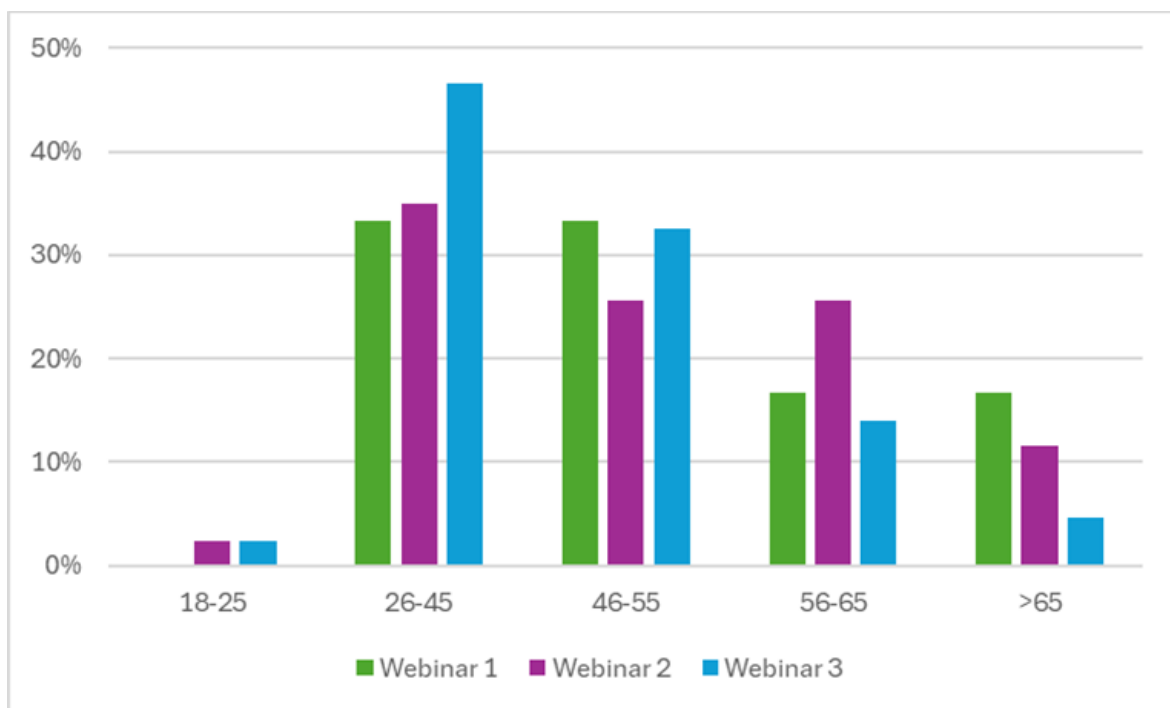


Figure 3: Webinar registrants age brackets

### Geographical location of webinar registrants

Registrations for the three webinars were received from participants across all Australian states and territories, as well as from international locations (New Zealand and the UK) with most registrations coming from New South Wales followed by Queensland. This broad geographic reach highlights the growing interest in Australia’s goat industry and underscores the influence of Australian goat production, processing, and marketing expertise in shaping emerging global markets.

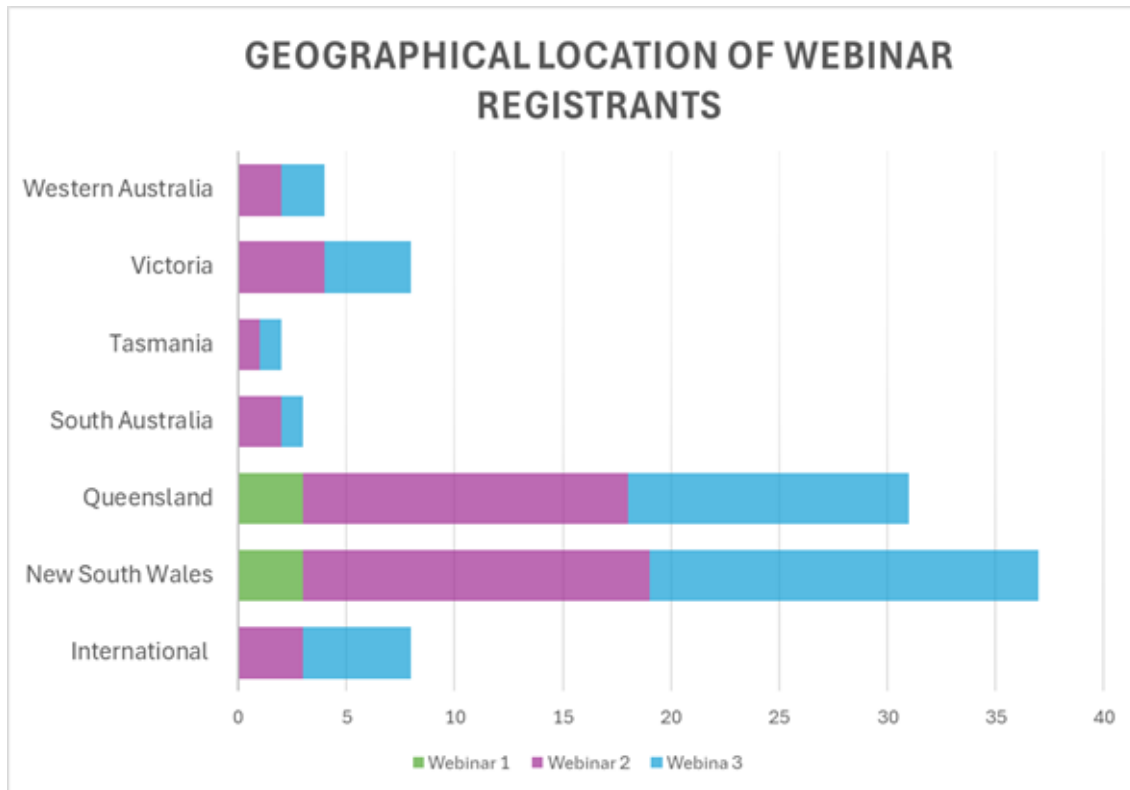


Figure 4: Geographical locations of webinars registrants

### Current occupation of webinar registrants

Producers formed the largest group of participants across the three webinars, reflecting strong engagement from on-farm stakeholders. However, the audience also included a diverse mix of representatives from industry organisations, extension, processors, and food service providers, demonstrating broad sectoral interest in goat value chain development. Participants who selected “other” encompassed a wide variety of roles, including educators, students, and agribusiness professionals, highlighting the broad relevance of the webinar topics across the wider red meat industry.

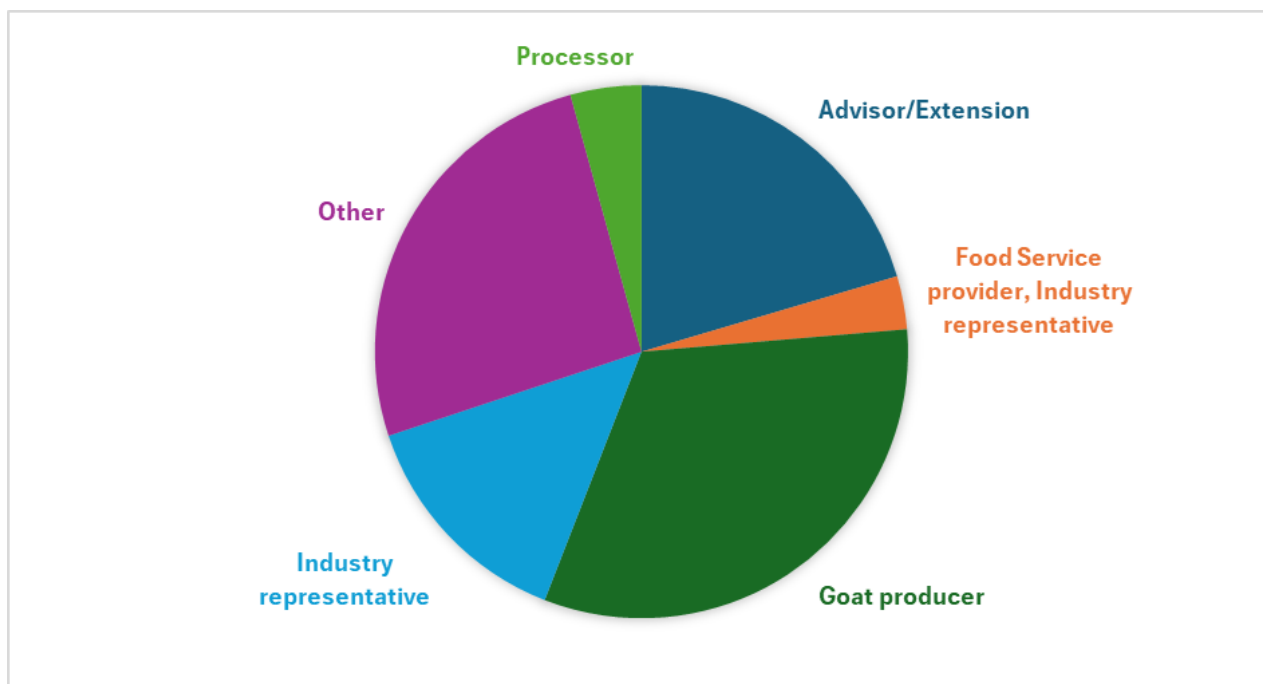


Figure 5: Occupations of webinar registrants

#### 4.1.4 Knowledge Survey Findings across the three webinars

Participants highlighted limited understanding of consumer preferences, with many rating their knowledge as low or moderate across the three webinars. Key consumer attributes mentioned by webinar participants included; price, fat content, carcass weight, consistent quality, availability, and product presentation (disease-free, pre-packaged, familiar meals).

Levels of collaboration across the goat supply chain varied among webinar participants. In Webinar 1, feedback indicated that only one respondent was already actively collaborating with other supply chain partners (for example, processors, marketers, or chefs), two respondents were exploring potential opportunities for collaboration, while three had not yet engaged in any formal partnerships. This highlights that while awareness of the benefits of collaboration is growing, practical examples and guidance are still needed to encourage wider participation.

Respondents showed strong interest in learning from supply chain case studies that demonstrate successful collaboration and in gaining a deeper understanding of consumer traits and value creation opportunities. This suggests that producers are eager for more targeted information on how to connect consumer insights to on-farm practices and how collaboration can enhance both product consistency and market outcomes.

## 4.2 Summary of the topics covered in the three webinars.

### 4.2.1 Webinar 1 – Global Flavours, Australian Goats: Exploring Consumer Preferences, Markets, and Culinary Diversity

A total of 49 people registered for webinar one with 26 people (53%) participating in the live webinar session, which is higher than the industry benchmarks of 30-40% (see pie chart below). The recorded webinar which was uploaded in YouTube was viewed 157 times as of 30 October 2025. This session explored who buys Australian goatmeat and what influences their purchasing decisions, giving producers insights into tailoring production to meet consumer expectations. Chefs, marketing

specialists, and international market managers highlighted the growing diversity of global cuisines incorporating goatmeat and the importance of producing consistent, high-quality products to capture premium market opportunities.

The discussion underscored how year-round supply, reliable quality, and product presentation are critical for positioning Australian goatmeat competitively. For producers, the key takeaway was understanding how their on-farm decisions directly shape market access and the value captured throughout the supply chain.

Five speakers presented at this webinar.

1. Dr. Melanie Smith – Program Manager, Sheep and Goat Research and Development, MLA Introduced the project and the webinar series.
2. Dr Janine Teese – A senior supply chain analyst, Greenleaf Enterprises. Presented about Australian goat domestic and international insights, including where Australia's goatmeat goes, prices and comparison with lamb and mutton.
3. Emiliano Diaz – A Market Insights Analyst, MLA Presented about USA customers and marketplace as well as other major importing markets, delving into cuisines, uses and reasons why the customers are choosing to buy Australian goat meat.
4. Craig Peacock – International Marketing Manager, MEATCO Australia shared further in-depth insights on his experience building on the market insights we have heard about in the previous presentations, with an export market focus.
5. Stuart Munro – Executive Chef/ Procurement Manager, Institutional food service shared insights into what is important to chefs and the food service industry.

### **Webinar 1 summary**

This section summarises key insights from the first webinar in the MLA 'Consumer to Grid' series. The session explored international and domestic goat meat markets, diverse goat cuisine that influences consumer preferences, and opportunities for producers. Presenters included supply chain analysts, market experts, and chefs, offering a comprehensive view of the goat meat industry.

### **Goatmeat domestic and international market overview**

Australia supplies approximately half of the global goat meat exports, with major importers including the USA, South Korea, and China. Goat meat is widely consumed across cultures and is valued for its leanness and versatility in cooking. It is exported in various formats such as frozen whole carcasses, skin-on or skin-off, and 6-way cuts.

Consumer research in the USA highlights goat meat's appeal due to its low fat and high protein content. It is a staple in Mexican cuisine and is gaining popularity as a health-conscious choice. Premium markets value the Australian goat for its clean, green image and reliable traceability.

Rangeland goats are preferred for their lean meat in international markets. Presentation is critical for skin-on products, especially in Taiwan and Korea. Hair removal can be difficult for certain breeds, impacting marketability in markets that prefer skin-on goat meat.

Export facilities are increasingly required to meet British Retail Consortium (BRC) Global Standards, which include food safety and animal welfare protocols. Seasonal demand fluctuations and inconsistent supply can affect market stability, with mutton often serving as a substitute when supply of goat meat is affected.

## **Culinary & Food Service Perspectives**

Goat meat is celebrated by chefs for its versatility, mild flavour, and ability to absorb diverse marinades and spices, making it ideal for a range of global cuisines from Mediterranean to Asian and African dishes. Despite this culinary potential, goat remains underrepresented in Australian food service, largely due to supply inconsistency and variable carcass characteristics. Chefs and restaurateurs require reliable quality in size, flavour, and tenderness to confidently feature goat on menus. Building consistent carcass specifications through feedback and information sharing with producers to ensure they produce animals fit for different market demands will be essential to increasing goat's presence in Australia's mainstream dining and premium food service sectors.

Creating awareness among consumers through media and influencer campaigns can help stimulate demand for goat meat products. As demand grows, supply will be pulled from producers, while seasonal availability can be leveraged to create menu specials and ready-to-cook formats that encourage broader adoption in restaurants and homes. Importantly, chefs and food service buyers operate with significant lead times typically three to six months, and sometimes up to twelve months for menu planning and new product development. For example, menu development for the April Autumn Winter season often begins in November, and product planning for Christmas specials can occur a year in advance. Understanding and aligning with these timelines is essential for producers and processors to ensure consistent supply and to position goat meat products effectively within seasonal food service cycles.

### **Key takeaways for producers**

1. Market insights help producers to align their production practices with key market drivers they want to focus on, such as considering breed selection to ensure compatibility with processing requirements, particularly for skin-on products.
2. Increase producers' relationship with the processors and other customers like in food service sector in order to understanding the market and the carcass specifications range they are looking for. This will enable the producers to meet compliance requirements and increase export opportunities
3. Capturing emerging domestic demand offers new opportunities. Growing consumer and chef interest in goat meat can be leveraged by supplying consistent, high-quality animals that encourage broader inclusion of goat on Australian menus.
4. Support brand and provenance stories through strong animal welfare, traceability, and sustainability practices to reinforce Australia's "clean, green" reputation which would add value throughout the supply chain and back to producers.
5. Understanding producers on-farm decisions that influence value such as genetics, nutrition and animal welfare practices will ensure production that aligns with the market demand.

### **4.2.2 Webinar 2 – From Farm to Fork: Aligning Carcass Traits with Consumer Demand**

This webinar helped producers understand which carcass traits consumers value most and how these traits affect demand and price. Of the 43 people who registered, 13 (~30%) attended live, and the YouTube recording has been viewed 102 times within a month. Using case studies from more than 20 companies, the session showed how size, fat cover and meat quality influence whether

goats meet market needs. It also explained how hitting the right specifications helps processors, retailers and exporters supply products consumers want.

Six speakers presented in this webinar

6. Dr. Melanie Smith – Program Manager, Sheep and Goat Research and Development, MLA
7. Introduced the focus of the webinar.
8. Amanda Marte – Senior Commercialization Manager, TFI USA
9. Dominick Zirilli – Corporate Executive Chef, TFI, USA. Presented about goat’s culinary versatility and nutritional profile.
10. Laura Brookman – Client Insights Manager, SPINS, USA.USA presented about the increasing goat meat sales in the USA, and the importance of labelling messaging to align with consumer perspectives of health.
11. Datassential, USA presented about Goat menu insights in the food service industry.
12. Dr Janine Teese, Senior Supply Chain Analyst, Greenleaf Enterprises presented domestic supply chain case studies from interviews with producers and other stakeholders.

### **Webinar 2 Summary**

The second webinar in MLA’s three-part series outlined at how goats move through the value chain from farm to processing, marketing and consumption in Australia and overseas. Dr Melanie Smith from MLA opened the session and highlighted why producers need to understand consumers and value creation. The webinar was delivered by Greenleaf Enterprises and facilitated by Dr Janine Teese, who guided the discussion on how different parts of the supply chain influence demand for goatmeat.

### **International Case Study: TFI USA**

The webinar included a case study from Thomas Foods International (TFI) USA that showed how Australian goat meat reaches U.S. supermarkets. Amanda Marte explained how goats are processed into ground meat, stew strips and cubes at TFI’s USDA-inspected New Jersey plant, highlighting goat’s lean, high-protein nutritional benefits. Chef Dominic Zarulli showed how goat’s flavour and versatility suit ready-to-eat meals but noted that low consumer familiarity means education and simple recipes are important for growth. Dominic’s Thai Coconut Curry Goat dish showcased innovation in ready-to-eat meals tailored for American tastes.

### **Retail Insights: Spins Analytics**

Retail insights from Spins Analytics showed U.S. goat meat sales have grown by 88% in one year, driven mainly by millennials, high-income households and families. Ground goat is performing strongly, especially in states like California. Label claims such as “Grass-fed,” “Halal,” and “No Antibiotics Ever” are helping build trust with health- and sustainability-focused shoppers.

### **Food Service Trends: Data Essentials**

Data Essentials reported growing interest in goat across U.S. food service, with goat now appearing on 3.7% of menus, especially in ethnic, street food and globally inspired dishes. Younger consumers are leading this trend, supported by social media interest and ready-meal innovation. The promotional video from MLA’s Goat Trails in Melbourne further illustrated domestic consumption and culinary diversity.

### **Domestic Value Chain Analysis**

Dr. Janine Teese presented findings from interviews with over 100 stakeholders across the Australian goat supply chain. She distinguished between supply chains (physical movement of goods) and value chains (consumer-driven value creation). Value chain mapping involves analysing product, information, and financial flows to identify where value is created and how it can be communicated.

Three domestic value chains were explored.

1. Producer → Processor → Butcher → Consumer
2. Producer → Processor → Wholesaler → Retailer → Consumer
3. Producer → Processor → Meat Depot → Butcher Chain → Consumer

Retailers and food service providers emphasised the need for consistent supply, good meat-to-bone ratio, mild flavour, and traceability. Ethnic consumers prefer fresh, bone-in cuts, while conscious consumers seek health-focused, sustainable, and ready-to-cook products.

Based on preferences, two primary consumer segments were presented:

1. Ethnic Consumers who are familiar with goat value freshness, natural products, and traceability. These consumers often shop at butcher shops and specialty stores.
2. Conscious Consumers. These prioritise health, sustainability, and ethical sourcing, shop at farmers' markets, and are willing to pay a premium for quality and transparency.

Packaging innovations, such as QR codes linking to provenance videos, were highlighted as effective tools for communicating value. Observational research, like packaging redesigns based on consumer behaviour, was also highlighted.

### **Processing Plant Dynamics**

Processing plants face challenges with smaller carcasses and fixed costs. Value adding e.g., boneless cubes, retail-ready packs must therefore be carefully evaluated for profitability. Efficient supply chain coordination can reduce costs and increase shared value. Specifications for live animals e.g., weight, dentition, fat coverage are critical for meeting market demands.

### **Conclusion and Next Steps**

The webinar concluded with a call to action for producers to align their production systems with consumer values. Consistency in supply, flavour, and quality is key to building robust value chains. The next webinar in the series was scheduled for October 14, and participants were encouraged to complete the post-webinar survey to guide future content.

### **Key takeaways for producers**

1. Consistent Quality and Carcass Specifications. Producers should focus on improving genetics, nutrition, and animal handling to deliver uniform carcasses that meet processor and retailer standards for premium branded goat meat.
2. Sustainable and Verified Production Practices. Traceable, ethical production systems including certifications such as Grass-fed, Halal, or antibiotic-free are increasingly important to align with growing consumer demand for transparency and sustainability.
3. Market-Oriented Production Planning. Producers consider breeding, finishing, and supply schedules in line with processor requirements and cultural demand peaks to maintain a reliable, market-responsive supply for both domestic and export channels.

### **4.2.3 Webinar 3 – Aligning the Goatmeat Value Chain with Consumer Preferences**

The final webinar in the Consumer to Grid series explored how consumer and market trends influence opportunities for Australia’s goat meat industry. It connected insights from producers, market analysts, food service, and processors to demonstrate how on-farm production decisions can align with evolving domestic and global consumer expectations. For producers, the key opportunity lies in understanding how supply consistency, product quality, and innovation impact the entire chain’s ability to meet emerging requirements.

Registration for this final webinar was 44 with live webinar session attendance reaching 17 which is 39% of all registered. There were 58 views of the webinar recording within a month of its upload to MLA YouTube channel.

Seven speakers presented in this webinar

1. Dr. Melanie Smith – Program Manager, Sheep and Goat Research and Development, MLA
2. Introduced the focus of the webinar.
3. Keeleigh and Brian Allport – Grassland Goats, vertically integrated business, presented about their arm-to-market enterprises, genetics, and domestic marketing.
4. Vivian Harris and Amy Chow, Market Insights, MLA, presented about global consumer trends and implications for goat meat.
5. Dr. Janine Teese, Greenleaf Enterprises; translating consumer insights into supply chain opportunities.
6. Stuart Munro, Chef & Procurement Manager, presented about food service and ready meal opportunities.
7. Anita Dennis, goat producer (Southwest Queensland), commercial goat breeding, genetics, and land management

#### **Webinar 3 summary**

##### **Producer case studies**

###### **1. Grassland Goats**

Keeleigh and Brian Allport presented their vertically integrated enterprise, Grassland Goats, which manages production, processing, and direct retail sales across Queensland. Initially transitioning from cattle to goats for drought resilience, they now breed rangeland goats crossed with Boer and Kalahari lines to achieve faster growth and improved carcass yields. Their focus is on supplying the domestic market with high-quality, halal-certified meat that appeals to both ethnic and mainstream consumers. They emphasised 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 goat meat, but opportunities lie in education, branding, and direct marketing.

###### **2. Anita Dennis – Producer (Southwest Queensland)**

Anita shared her experience managing over 25,000 goats across rotational grazing systems in Blackall, Queensland. After transitioning from sheep to goats, she implemented KidPlan genetics and performance recording to improve productivity and profitability. Her operation combines genetic selection, predator management using guardian dogs, and controlled mating to enhance efficiency. Anita underscored the importance of rotational grazing, low-stress handling, and infrastructure investment for long-term sustainability. Her future focus includes advancing nutritional

management, particularly for does carrying multiples, and continuing data-driven decision-making to align productivity with environmental resilience.

### **Protein trends Insights**

Vivian and Amy from MLA's Global Market Insights team presented key international consumer trends relevant to goat meat. They identified four major drivers: health and wellness, sustainability, convenience, and global discovery. Goat meat aligns strongly with health trends as a lean, nutrient-dense protein rich in iron and creatine. Sustainability and animal welfare credentials further enhance its appeal, especially among younger and higher-income consumers. However, communication gaps remain many consumers value sustainability but are unsure what it means in practice. Convenience formats such as ready-to-cook or pre-marinated cuts can overcome barriers of unfamiliarity, while global discovery trends present opportunities to position goat within multicultural and fusion cuisines. Case studies from Korea, Taiwan, and Western markets illustrated how goat can evolve from niche ethnic consumption to mainstream retail and food service offerings.

### **Supply Chain Translation**

Dr. Teese built on the MLA insights, translating consumer preferences into actionable strategies for the goat supply chain. She described emerging consumer personas, connected trendsetters, claim seekers, and convenience cravers, each motivated by transparency, health, and convenience. To engage these audiences, goat products should integrate strong storytelling, credible label claims e.g., grass-fed, sustainable, halal, and digital marketing linking recipes to online purchasing. Dr. Teese emphasised that goat meat should be positioned as a premium yet accessible protein, with targeted innovation in packaging and value-added products to meet consumer expectations for nutrition, ease, and authenticity.

### **Food Service Sector**

Stuart offered a perspective from the food service and catering industries, which account for around 30% of Australia's food spend. He noted rapid growth in the ready-to-eat and meal-kit sectors, presenting opportunities for goat meat in diced, minced, and portioned formats. Industrial catering for education, mining, and aged care could be new entry points if goat maintains consistent quality and competitive pricing. However, limited familiarity among chefs and diners remains a challenge. He advocated for targeted education and marketing to promote goat as a versatile, sustainable alternative to lamb and beef, highlighting success in ethnic-inspired dishes and premium ready-meal concepts.

The webinar concluded with a Q&A session addressing market expansion beyond ethnic communities. Speakers agreed that as goat meat becomes more visible in restaurants and retail, and as health-conscious consumers seek lean proteins, domestic demand will grow. Availability, education, and convenient product formats will be critical to bridging familiarity gaps. Goat meat's unique combination of sustainability, nutrition, and cultural versatility positions it well to capture both premium and mainstream markets.

### 4.3 Survey insights from three webinars and recommendations

Across the three webinars, participants were asked several questions through the pre- and post-webinar surveys to determine their interests and understanding of the topics that were presented in the webinars. Overall, participants highlighted a limited understanding of consumer preferences, with many rating their knowledge as low or moderate across the three webinars. Key consumer attributes identified included price, fat content, carcass weight, consistent quality, availability, and product presentation (disease-free, pre-packaged, familiar meals).

Levels of collaboration across the goat supply chain varied among webinar participants. In Webinar 1, feedback indicated that only one respondent was already actively collaborating with other supply chain partners (e.g., processors, marketers, or chefs), two respondents were exploring potential opportunities for collaboration, and three had not yet engaged in any formal partnerships. This highlights that while awareness of the benefits of cooperation is growing, practical examples and guidance are still needed to encourage broader participation.

Respondents showed interest in learning from case studies that demonstrate successful collaboration and in gaining a deeper understanding of consumer traits and value-creation opportunities. This suggests that producers are eager for more targeted information on how to connect consumer insights to on-farm practices and how collaboration can enhance both product consistency and market outcomes.

Table 2 below summarises the responses to questions asked in the pre- and post-webinar surveys to highlight consumers' understanding of global protein trends and what is required to take up opportunities to supply goat meat to different markets.

Table 2: Summary of the survey questions asked in surveys across the webinars

Questions	Responses
What are two things you hope to learn from the webinar?	Further price signals beyond carcass weight
	Market supply chain
	What drives and limits consumer interest in goat meat products including key motivators, barriers such as unfamiliarity, and global perceptions of goat meat? How have non-traditional markets successfully normalised goat consumption, and why do mainstream Australian supermarkets continue to stock limited goat meat, is it due to supply constraints or market resistance?
	What does the domestic market want in goat meat products, and how do “hide-on” versus “hide-off” preferences affect value? What defines the ideal goat and optimal body condition score, and how can condition be improved most efficiently through feed lotting or paddock feeding including the cost of adding 1 kg of weight to a 20 kg male or dry female?
Which aspect of the supply chain are you most interested in?	Domestic supply chain case studies
	Goat meat characteristics that are mostly sought after by consumers
	Value creation and cost optimisation
	Goat meat characteristics that are mostly sought after by consumers
	Other - MSA
In your opinion, what is the most important goat carcase characteristic to consumers across markets?	Depends on market hence we need a grading system
	Price, then fat levels
	Not sure
What do you hope to learn more about in this webinar?	What carcass traits are preferred by different consumer groups (e.g., Caribbean, Indian, Nepalese, Lebanese), and what is the

	<p>relative size of each market segment? Is there a dominant market type (e.g., entire rangeland males or castrated F1 withers), and how important are sustainability, traceability, and “clean, green” credentials to goat meat customers? Can provenance and other intangible attributes be leveraged to increase carcass value and price returns?</p>
	<p>Better understanding of what consumers are looking for from goat meat and how the domestic supply chain works? Value and efficiency?</p>

Figure 6 and Figure 7 show moderate understanding across the two questions, highlighting the value of these webinars in increasing understanding and in developing a supply chain that aligns with customer and consumer preferences and requirements.

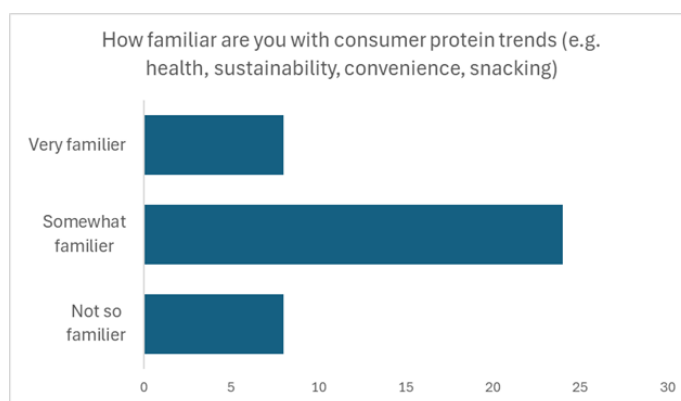


Figure 6: Familiarity with consumer protein trends

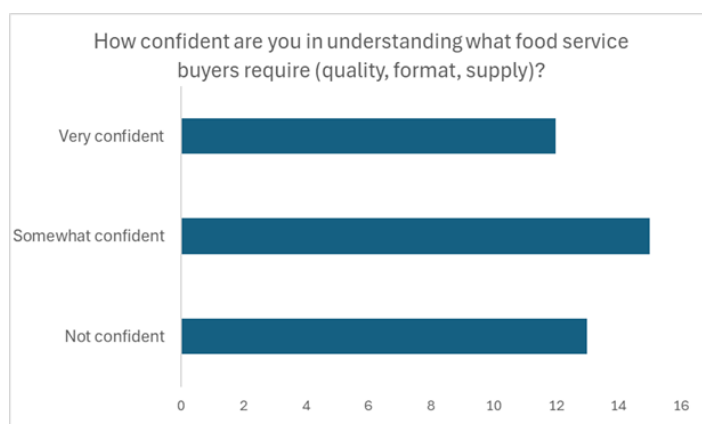


Figure 7: Understanding of food service buyers' requirements

The webinar series facilitated through this project was successful. However future recommendations include;

- (1) To improve feedback and evaluation mechanisms, use in-webinar polls and simplified post-event surveys to capture richer data on behaviour change and knowledge uptake.
- (2) The webinars were viewed by majority post event, so the question is with this trend common across webinars, is there a way to optimise quality recording (e.g. should the webinars have been recorded professionally offline to enable a better-quality delivery or with all speakers to avoid audio issues)?

Sessions could then have been held where snippets were played, the panel was online, and questions were answered about the webinars and content delivery. This could have been done for

each topic. This would still have enabled answering questions and engaging with a live audience – or the recording could have been played like TFI USA videos, so they were watching it for the first time.

#### **4.4 R&D summary of meat goat research and link to the goal of developing the sustainable, consumer-oriented goat meat supply chain**

A R&D summary of MLA-funded goat projects conducted between 2015 and 2025 was compiled and highlighted the substantial progress in improving herd productivity, meat quality, and supply chain efficiency. Project investments have advanced genetic improvement, nutrition management, and traceability systems, positioning the Australian goat industry for greater market resilience.

A wider investigation of international literature was also included in the search which identified wider areas of research that had been conducted overseas, including in Europe and South Africa. However, research remains fragmented, with limited integration between production outcomes, consumer expectations, and domestic market development. Future priorities for investments should focus on building goat-specific production and economic models, linking carcass and sensory data with consumer insights, and strengthening domestic market research, branding, and adoption pathways to create a cohesive, value-driven goat meat supply chain.

Based on the review of goat research conducted domestically and internationally between 2015 and 2025, resulted in 26 sources of information ranging in formats including; reports, R&D project investments, perspective papers, research papers, and survey outcomes. All literature was then grouped into three main themes: **(1) production and productivity, (2) meat science and product quality, and (3) supply chain and marketing research**. Taken together, these studies provide a useful overview of how the Australian and international goat sectors have developed, the research topics, and remaining gaps that need to be addressed to support a sustainable, consumer-oriented goat meat supply chain.

##### **4.4.1. Production and Productivity Research**

Across the production and productivity literature, most studies focus on improving on-farm performance through genetics, nutrition, grazing management, animal health and reproductive efficiency– for example, by enhancing reproduction rates, selective breeding, and better feeding strategies (Herrero et al.; New South Wales Department of Primary Industries and Meat & Livestock Australia). Common topics include evaluation of crossbreeding systems (for example, Boer, Kalahari or other meat breeds over rangeland does), growth and carcass performance of different genotypes, kid survival and weaning weights, and the role of supplementary feeding in improving body condition and weight gain is another frequent focus (Australian Centre for International Agricultural Research; Leo-Penu et al.). Several studies highlight the comparative advantages of goats in mixed enterprises, including their ability to utilise shrubs and browse species, contribute to weed control, and fit into low-input rangeland systems (Herrero et al.; Australian Centre for International Agricultural Research; Gawat et al.).

However, important gaps remain. Many published studies are small-scale or experimental, with limited data from commercial rangeland operations. In practice, many producers still rely on sheep-based benchmarks and guidelines for nutrition and reproduction because goat-specific recommendations are scarce. There is relatively little work on structured mating systems (e.g., defined joining periods), targeted pre-mating and late-gestation nutrition, or the economics of more intensive finishing (feedlotting or containment feeding) to meet specific carcass specifications. Issues such as predation, variable seasons, labour constraints and infrastructure are frequently mentioned,

but are not always linked to quantitative analyses of profitability, risk and resilience at farm level (Abhijith, *et al.*; Adams, C.,).

Overall, the production research shows that there is clear potential to lift productivity through better genetics, nutrition and management practices, but it also confirms a shortage of practical, regionally relevant decision-support tools that producers can use to plan feeding strategies, joining programs and turn-off weights aligned with market requirements (*Herrero et al.*).

#### **4.4.2. Meat Science and Product Quality Research**

The meat science and product quality literature focuses primarily on carcass traits, lean meat yield, tenderness, pH decline, colour stability and shelf life. Studies have investigated the effects of age at slaughter, carcass weight, fat cover, electrical stimulation, chilling regimes and ageing time on objective quality parameters (Abhijith *et al.*; Holeman *et al.*). In general, goat meat is characterised as a lean, nutrient-dense protein, often noted for its lower fat content and flavourable nutritional profile compared to other red meats (Gawat *et al.*). For instance, consumer surveys confirm that attributes like low fat content and health benefits are perceived as key advantages of goat meat that influence their consumer preferences and purchasing decisions for goat meat.

Despite these known benefits, there are relatively few studies that link meat quality traits directly to specific domestic or export market segments. Sensory evaluations are often conducted with small consumer panels or trained panellists and may not capture the preferences of newer or emerging customer groups such as health-conscious consumers, convenience-driven shoppers, or multicultural urban markets. There is also limited published work on value-added products such as goat mince, boneless cubes, marinated cuts or ready-to-cook / ready-to-heat meals, particularly in relation to shelf life, eating quality, cost of production and consumer acceptance.

As a result, while the meat science literature provides a solid base on fundamental carcass and quality parameters, it does not yet offer a comprehensive evidence base for product development and branding decisions. Processors and brand owners aiming to design differentiated products for food service, ethnic retail, mainstream supermarkets or online channels still have to extrapolate from other species or rely on ad hoc market feedback.

#### **4.4.3. Supply Chain and Marketing Research**

The supply chain and marketing research is dominated by analyses of the export-oriented, commodity-style rangeland goat trade. Studies document trends in slaughter numbers, export volumes, destination markets and price movements, as well as the role of opportunistic harvesting compared with managed herds (Batzios, Panagiotis, *et al.*; Bui, Thi Nga, *et al.*). Key structural issues identified include high dependence on a small number of export markets, variable and seasonally constrained supply, large distances to processing facilities, and limited regional capacity for value adding.

In contrast, there is comparatively less research on domestic market development, consumer segmentation and branding strategies for goat meat in Australia. While some work acknowledges the importance of ethnic markets and food service (such as Indian, Middle Eastern, African and Asian cuisines), there are few quantitative studies on willingness-to-pay, preferred product formats (bone-in vs boneless, skin-on vs skin-off), or the influence of provenance, halal, sustainability and “clean and green” claims on purchasing decisions (Star *et al.*,; Hamad *et al.*; Alcalde *et al.*). Economic evaluations of alternative business models such as vertically integrated enterprises, preferred-supplier groups, contract finishing or long-term processor producer partnerships are also limited (Greenleaf Enterprises pty ltd)

This means that producers, processors and marketers interested in building consumer-oriented, value-based goat supply chains often have to rely on generic red meat marketing principles or their own trial-and-error experience, rather than goat-specific evidence on how to structure profitable, resilient and market-aligned supply chains.

#### 4.4.4. Recommendations for Future Research based on R&D summary

Based on the patterns emerging across production, meat science and supply chain/marketing research, several priorities are recommended for future work following this investment:

- 1. Develop goat-specific production and economic decision tools**
  - Generate regionally relevant benchmarks for on farm productivity metrics (e.g. growth rates, fertility, survival and feed conversion under commercial conditions).
  - Link genetics, nutrition (especially pre-mating, pregnancy and finishing), mating management and health interventions to profitability and risk, not just biological performance.
  - Provide practical tools for producers to estimate the cost of adding liveweight to meet defined carcass specifications for different markets.
  - This will help guide on farm management decisions on farm helping producers meet market targets and supply chain specifications.
- 2. Define market-driven carcass and product specifications**
  - Conduct integrated meat science and consumer studies to identify optimal carcass weight ranges, fat cover and cut styles for key market segments (e.g., ethnic retail, food service, mainstream retail, export markets such as North America and Korea).
  - Expand sensory and consumer research to include emerging domestic segments, such as health-conscious and convenience-oriented buyers, and to test value-added formats (mince, cubes, marinated cuts, meal components).
  - Understanding carcass parameters and linkages to both processing optimisation (e.g. ideal fat cover for processing, product consistency and consumer preferences) paired with consumer sensory will help improve product consistency and overall consumer eating experience.
- 3. Strengthen supply chain and market development research**
  - Analyse domestic market opportunities in food service, industrial catering and retail, including price signals, logistics, and risk-sharing arrangements.
  - Investigate the role of traceability, provenance, halal certification, animal welfare and sustainability credentials in differentiating Australian goat meat and supporting premium pricing.
  - Evaluate alternative business models (vertically integrated chains, producer alliances, preferred supplier programs) to understand what enables consistent supply and value creation.
- 4. Focus on extension, adoption and behaviour change**
  - Understanding how producers, processors and other stakeholders make decisions, what information they trust, and which extension models (webinars, on-farm demonstrations, peer-learning groups, digital platforms) are most effective.
  - Integrate social and behavioural research into technical projects to ensure that new knowledge is practical, scalable and adopted in real-world systems.

By addressing these gaps, future goat research can move beyond describing the current industry towards actively shaping a more productive, resilient and consumer-aligned goat meat value chain in Australia.

## 5. Conclusion

The successful delivery of the “From Grid to Consumer” Goat Webinar Series has provided a practical platform for translating consumer insights into actionable knowledge for producers and supply-chain participants. The webinars were delivered between August and October 2025, and each focused on a specific theme connecting producer practices with consumer and market expectations.

The webinar series achieved strong engagement across Australia, with 136 total registrations, 56 live attendees, and over 250 YouTube views by 30 October 2025. Attendees represented a broad cross-section of the industry, including producers, processors, researchers, consultants, veterinarians, and extension officers. Participation also included international registrants from New Zealand and the United Kingdom, reflecting the global relevance of Australian goat production.

The webinar series was designed, developed and delivered to support the connection between producers and consumers. Publicity from MLA and Greenleaf through a range of social media channels saw engagement from a broad audience, including producers, processors, universities and the public sector.

The webinar recordings are housed on the MLA You Tube Chanel and available via the [Grid to Consumer website](#).

### 5.1 Key insights from the Webinars

- Producers gained an understanding of what a consumer-oriented goat meat supply chain involves and how on-farm decisions influence market value.
- Consumer insights revealed strong demand for lean, sustainable, and convenient goat meat products in both domestic and export markets.
- Food service and retail opportunities are expanding, particularly for consistent, value-added goat products.
- Supply consistency and carcass quality were identified as critical for building processor and consumer confidence.
- Collaboration across the value chain through linking producers, processors, and marketers is essential for aligning supply with evolving consumer expectations.

### 5.2 Benefits of the project to industry

1. **Improved producer understanding of consumer value drivers:** The project equipped producers with practical insights into what consumers and retailers value most, including lean meat yield, consistency, sustainability, and convenience, helping them align breeding, feeding, and handling practices with market expectations.
2. **Strengthened value-chain collaboration:** By connecting producers, processors, and marketers through the webinar series, the project built stronger industry relationships that support coordinated supply, improved carcass quality, and more efficient market feedback loops.
3. **Increased domestic market potential:** The project showcased opportunities in food service and retail sectors for consistent, value-added goat products, encouraging investment in processing innovation, product diversification, and supply reliability within Australia.

4. **Enhanced industry capability and confidence:** Through knowledge sharing, the project improved producer capability to engage in consumer-focused production, fostering a more informed and market-responsive goat meat industry.

## 6. Future research and recommendations

### 6.1 Key recommendations

This webinar series supports the focus of Value-Based Marketing within MLA as an investment priority with goat producers, processors and researchers understanding what markets are looking for and prepared to pay for. These webinars showcased to the goat industry stakeholders the opportunity for goat meat to be a highly regarded and valued protein across a range of cultures and culinary options.

To continue with developing a stronger goatmeat industry, it is recommended to:

- Continue targeted extension activities to maintain momentum and reinforce consumer-focused production principles through workshops, case studies, and digital engagement.
- Establish a coordinated knowledge exchange between researchers and lead producers to develop and share goat-specific nutritional guidelines for key production stages. Current reliance on sheep-based information highlights a critical gap in tailored goat nutrition resources. Addressing this through collaborative research and extension activities will improve herd productivity and increase overall industry confidence in evidence-based management practices.
- Develop producer-facing and processor-focused resources that provide insights and updates on consumer trends, packaging, and product presentation, and facilitate market alignment resources to identify supply chain innovations required and impact on carcass attributes, genetic selection and on-farm management.
- Sustain communication through MLA's Goat Hub and other digital platforms to keep stakeholders updated with new market insights and value-chain opportunities.
- Facilitate online updates from current research investments through multiple communication pathways (eg webinars and newsletters etc).
- A supply chain approach to industry supported projects is required. Producer-centric projects also need to consider supply chain implications and the impact on customers, consumers and supply chain productivity and profitability.
- To support an increase in the value of goat meat, processing plants and wholesalers require industry support to develop new products and expand their markets.

## 6.2 Recommended next steps

- (1) Webinar + Q&A session with industry stakeholders
  - Projects currently funded by industry – 10-minute presentation from each project on outlining project activities, linkages to producers, adoption and markets
  - Extension officers, MLA, industry partners, project team leaders, researchers, industry representatives, e.g. Agforce, Breed societies, GICA, etc
  - Identification of collaboration and cooperation opportunities to support the development of consumer orientated goat meat supply chains
  
- (2) Collaboration with goat processing companies and wholesalers to:
  - Identify new market opportunities (domestic and international)
  - Document and support communication of the processor's requirements across the supply chain (from processors through to goat producers – including pricing grids and other parameters which could impact the processor and wholesaler.
  - Some of the processor's challenges include:
    - Long mohair types – challenges with hair removal at processing (e.g. hair doesn't come out of the skin easily causing contamination issues)
    - Smaller carcase sizes – smaller carcasses can be challenging for processors who are using processing equipment and dual purpose lined for mutton as the smaller goat bodies don't fit
    - Too much fat coverage – understanding fat coverage of animals prior to processing is important as it impacts your customer preference and market
      - Some consumers and markets prefer a lean carcase
      - Some customers prefer a carcase with more fat coverage,
      - Important to find the right customer and meeting the market you are supplying
    - Low body condition with little muscle: under condition animals produce less desirable muscle to bone ration for key markets. Ensuring animals have a desirable condition score for your market will help to meet market specification, improve muscle to bone ratio.
      - E.g. complaints from customers on low body condition animals as leads to poor muscle-to-bone ratio
  - Undertake supply chain analysis to see where improvements and changes are required along the supply chain to capture value-adding opportunities for goat meat in Australia and internationally. For example:
    - Shelf life of chilled product in different packaging and under different temperature regimes
    - Definition of flavour attributes and linkage to carcase types and production systems
    - Further qualification of the potential for goat primals to be aged and then frozen, like what happens with some beef and sheep primals
    - Understanding of chilling requirements of weight ranges and types of goat carcasses
  
- (2) Highlight investments across the supply chain with 'Return on Investment' focus. For example,
  - Build in businesses cases to support on farm management decisions eg: For a producer to fence, rotationally graze, have smaller paddocks, invest in genetic improvement – what does this mean financially and economically for their business?
  - Support producers to understand the key economic drivers for different business models with the inclusion of financial ROI.

- Develop adoption programs to help increase meeting market specifications and goatmeat consistency through practice change programs such as PDS
  - Generate businesses cases to show how processing plants can generate better weight range carcasses, develop value added products – what is the value and profit increase that is possible.
- Outside of labour, what are the key economic and profit drivers that can strengthen a sustainable, profitable goat meat market?
- For a wholesaler or processing plant to have a run of carcasses that are of a similar size and weight, for 4-12 months of the year guaranteed, what does this mean in terms of market access and market development in the food service industry and in high-end restaurants in various international markets?

## 7. References

Refer to Appendix A. – R&D Review References.

## 8. Appendix

### 8.1 Appendix A – R&D Review References

Title	Author	Year	Abstract	Country
Effects of climate change on goat production and mitigatory measures in semiarid savanna ecosystems	Alban Mugoti, Casper Nyamukanza, Anderson Munengwa, Sizo Moyo & Nation Chikumba	2025	Climate impacts on goat productivity and mitigation strategies around selective breeding and animal husbandry discussed	Zimbabwe
Goat Production, Supply Chains, Challenges, and Opportunities for Development in Vietnam: A Review	V. D. Nguyen et al.	2023	Review of current situation of goat production and supply chain functioning. Challenges include breeding programs, supply chain inconsistencies and lack of consumer and market research. Opportunities exist in consumers' health consciousness, increasing demand, high-value adding, and strong government support	Vietnam
Live weight gain and metabolisable energy requirements of young entire male Australian Rangeland goats in response to supplementation	Leo-Penu, C. L. O. et al.	2022	There is limited information available to establish feeding strategies to maximise growth rates of Rangeland goats within these developing managed production systems. The aim of these experiments was to determine the response to supplements and the metabolisable energy requirements for maintenance and liveweight gain of young entire male Rangeland goats. Supplementation with starch-based rations will increase liveweight gain and decrease age at turn-off of young entire male Rangeland goats; however, the local availability and cost of these supplements need to be considered.	Australia
Dairy Goat Production: Socioeconomic, Environmental, and Cultural Importance Across Time (1970–2022) and Possible Scenarios (2050)	Navarrete-Molina et al.	2024	Dairy goat productivity, sustainability, and socioeconomic factors across the world. Potential of goats and DGs to be considered the "animal of the future" due to their refined and sophisticated ethological, adaptive, and physiological plasticity under generally clean, green, and ethical production schemes, mainly in marginal contexts in the arid and semi-arid zones of the world.	Global
Technical indicators and economic performance of dairy goat farms in Greece: An efficiency analysis	Batzios et al.	2023	The efficiency level of dairy goat farms in Greece and their main technical and economic indicators were analysed. Technical indicators, feed, labour, economic performance	Greece
Characterization and typology of goat production systems in the Southern Highlands of Peru	Sessarego et al.	2025	Typology of goat production systems. Despite their diversity, all goat production systems shared extensive management practices and resource constraints, resulting in low productivity. These findings highlight the need for targeted public policies to improve productivity and sustainability in goat farming within the Ica region	Peru
Increasing goat productivity in Ethiopia and India	Herrero et al.	2020	There are opportunities to increase goat meat productivity in both Ethiopia and India. Reproduction, liveweight gain and survival rates can be increased through better nutrition, genetics and healthcare, but the biggest increase in production and profits occurred when multiple interventions were combined	Ethiopia/India
Goat production systems and marketing in Lao PDR and Vietnam	ACIAR Project LS-2017-034	2023	This project aimed to enhance income-generating opportunities for goat-raising households in Lao PDR through the development of productive, environmentally sustainable, socially acceptable and gender-sensitive production systems accessing high-demand markets in Vietnam. Some of the major outcomes of the project were improved goat health and nutrition, increased goat productivity and profitability, and enhanced goat market access and value chain development.	Lao PDR/Vietnam

NSW DPI & MLA "Measured Goats" project	NSW DPI & MLA 'Measured Goats'	2023	The Measured Goats project will gather genomic data on key production, welfare and reproduction traits to develop a series of performance benchmarks. This data will underpin a new goat genomic reference population, which will be used in KIDPLAN analysis. By doing so, we can unlock the untapped potential within Rangeland herds, achieving rapid genetic improvements in production and welfare traits while enhancing farm profitability	Australia
A review of some aspects of goat meat quality: future research recommendations	Abhijith et al.	2023	Reviewed research on goatmeat quality and adequate grading system for goat meat quality and future research recommendations. Some of the critical areas need research are the influence of genetics and age of animals on meat quality, standardisation of the ageing period of various goat meat cuts, cooking innovations, consumer acceptance and sensory analysis of goat meat.	Australia
Goat Meat: Production and Quality Attributes	Gawat et al.	2023	Discussed meat quality in terms of the most significant quality parameters in food processing technology: chemical composition and physicochemical and functional properties. Its toughness is an issue that can be attributed to the combined factors of high pH, high collagen content, and less fat content.	New Zealand
Electrical stimulation and wet ageing effects on the carcass and meat quality of Australian rangeland goats	Holman et al.	2024	Investigated Medium voltage electrical stimulation and wet ageing periods effects on the carcasses and meat quality of Australian rangeland goats. Findings suggest there to be little benefit to post-dressing electrical stimulation of rangeland goat carcasses, when applied independent to or in combination with ageing.	Australia
Effect of slaughter age and post-mortem days on meat quality of longissimus and semimembranosus muscles of Boer goats	Abhijith et al.	2021	Investigated the effects of age of animal and days post-mortem (PM) on meat quality of Boer goats. This study confirms the previous findings of higher ultimate pH and rapid chilling of carcass in commercial processing conditions in goats. Insufficient glycogen levels in Boer goats prior to slaughter which determines the post-mortem glycolysis is a critical area to be addressed by goat producers. Age influenced the ultimate pH and retail color stability with better stability observed in young goats of 6–9 months. However, days PM increased the tenderness of goat meat irrespective of age.	Australia
Physicochemical Quality and Fatty Acid Profile in the Meat of Goats Fed Forage Cactus as a Substitute for Tifton 85 Hay	Pinheiro et al.	2023	The objective was to evaluate the physical and chemical quality, fatty acid profile and sensory acceptance of the meat from goats fed forage cactus as a substitute for Tifton 85 hay. Goats fed cactus pear had better meat texture compared to animals fed Tifton 85 hay in their diet. There is no influence of the other analyzed parameters of physical quality of the meat in relation to the type of diet supplied to the goats in this research. Meat from goats fed with the inclusion of 55% of cactus pear in the diet showed more favorable sensory attributes by consumers than meat from animals fed other diets. Therefore, it is recommended that Tifton 85 hay is replaced with 55% forage cactus, as it provides lower lipid content and higher content of monounsaturated fatty acids in goat meat, resulting in an excellent option for consumers who mainly seek healthier food	Brazil
Physicochemical Composition and Sensory Quality of Goat Meat Burgers. Effect of Fat Source	Teixeira et al.	2021	The aim of this study was to study the effect of the replacement of pork as a source of fat with an olive oleogel in burgers manufactured with goat meat and to compare the goat meat burgers with the most common commercial burgers made with beef. This study confirms the potential of oleogel technology to incorporate olive oil in goat meat burgers, providing a better lipidic quality. In sensory terms, the replacement of pork fat with olive oil produced a decrease in hardness and chewiness and a better flavor	Portugal
Meat Composition, Fatty Acid Profile and Sensory Attributes of Meat from Goats Fed Diet Supplemented with Fermented Saccharina japonica and Dendropanax morbilifera	Saturno et al.	2020	A 90-day feeding trial was conducted to evaluate the effects of diets supplemented with three concentrations (control or 0%, 0.5% and 1.0%) of fermented Saccharina japonica and Dendropanax morbilifera (FSJ-DM) on the meat composition, growth performance, oxidative stability and fatty acid profile of Korean native black goat (KNBG) meat. Overall, the results of this study suggest that diet supplemented with 1.0% FSJ-DM improves the meat composition, growth performance and fatty acid profile and reduces lipid oxidation of goat meat	Korea

Quality traits and fatty acid composition in meat of HairGoat and Saanen×Hair Goat (G1) crossbred kidsfattened in different systems	Tüfekci et al.	2021	In this study, meat quality traits and fatty acid compositions of Hair Goat and Saanen×Hair Goat(G1) crossbred kids fattened under intensive, semi-intensive and extensive conditions were determined. It was concluded that the extensive fattening group had greater conjugated linoleic acid contents than the other fattening groups	Turkey
Carcass and meat characteristics of male Kacang goat fattened by complete silage	Tahuk et al.	2020	The aim of the study was to determine the carcass and meat characteristics of male Kacang goat fattened by complete silage made from natural grass, Sorghum bicolor (L.) Moench and Pennisetum purpuphoides. The use of S. bicolor (L.) Moench and P. purpuphoides as a basic forage in making complete silage has been shown to increase carcass percentage, the content (%) of fat, collagen, and cholesterol. Otherwise, the treatments have no effect on the content of pH, tenderness (kg/cm <sup>2</sup> ), cooking loss (%), and water holding capacity (%) of male Kacang goat fattened. Therefore, S. bicolor (L.) Moench and P. purpuphoides plants have great potential to be developed by farmers/ranchers as feed for goats	Indonesia
Goatmeat quality – pathway to the future	MLA Goatmeat Quality Project	2021	This project aimed to map out and test pathways to address the issue of inconsistent goatmeat eating quality and product differentiation. Two processor surveys were conducted to assess critical control factors affecting goatmeat eating quality. The survey was based on the current Meat Standards Australia (MSA) sheepmeat pathways system. The survey reviewed if the application of the current sheep standards is sufficient, and whether improvements need to be made. Whilst the survey identified that many pre-slaughter animal practises are similar than those conducted in sheep, goat carcasses are typically not electrical stimulated, are not chilled for long periods of time and are not aged, which in turn may impact on the product eating quality. This indicates that a minimum weight may be required to ensure carcasses have enough weight to withstand chilling, and also shows that there is potential for particularly the rangeland goats to meet the pH temperature window, hence improvements in eating quality can be obtained with appropriate chilling regimes in combination with electrical stimulation. Both sex and breed did impact on the carcass weight range and the pH decline process, hence these animal factors may need to be accounted for when chilling and electrical stimulation configurations are further explored	Australia
The Australian Goat Meat Value Chain	UNE Agribusiness Perspectives	2018	The strengths, opportunities and challenges facing the goat meat industry of Australia are explored using value chain analysis. This industry is still largely opportunistic with a majority of goats processed for meat coming from rangeland, or considered to be feral goats. This ad hoc nature of the value chain allows for a number of different areas to be targeted for value adding, including ensuring a regular supply of the meat to both the domestic and export markets. The industry is not without its challenges including legislation, operational logistics and consumer perception and education. There are a number of opportunities for growth in the production of Australian goat meat with potential increases in sales domestically and through exports a possibility. Ensuring a stable supply of goat meat is the number one priority in being able to grow the goat meat industry in Australia. However, this is dependent on a number of factors including legislation, environmental factors, logistical factors and the influence of other stock demands and availability. Once a stable supply has been secured there are a number of opportunities for value adding throughout the supply chain, including the ability to increase the carcass weight yield through farming practices through to increasing demand by creating awareness and knowledge of goat meat's use in cooking	Australia

Supply Chains of the Sheep and Goat Meat Industry	Star et al.	2019	The report identifies and maps supply chain models in Queensland's sheep and goat meat industry to guide government and industry policy that enhances producer profitability and regional economic growth. Interviews with key intermediaries revealed the industry's structure, key linkages, and value-adding processes, highlighting that animal management and production are central to supply chain performance. Major challenges include wild dog predation, limited access to improved genetics, and a shortage of local expertise in animal health and nutrition issues constraining industry expansion. Although the supply chain is relatively short, especially in Outback Queensland, it remains fragile due to inadequate cold chain logistics, poor road access, and labour shortages. Informal networks currently play a crucial role in sustaining market development and supply chain viability.	Australia
An Analysis of the Goat Value Chain from Lao PDR to Vietnam and a Socio-Economic Sustainable Development Perspective	Bui et al.	2023	This study examines the goat value chain linking Laos and Vietnam, where high Vietnamese demand drives exports worth over USD 2.2 million annually. Based on 400 surveys, it identifies four key actors: farmers, traders, abattoir owners, and restaurant owners with weak input supply roles and limited processing capacity. The chain operates largely through informal, oral agreements without clear leadership or traceability systems. Despite these gaps, goat trading generates positive income and employment, especially for disadvantaged rural groups. The study recommends joint Lao-Vietnamese policies to enhance traceability, improve husbandry and feeding practices, and strengthen farmer collaboration for sustainable chain development.	Lao PDR/Vietnam
Developing a sustainable high-value market driven goat supply chain	MLA Market-Driven Goat Chain	2023	The project was undertaken to understand the international and domestic demand for goat meat products and the technical trade barriers for new and existing products and markets. Stakeholders in goat meat supply chains were interested to understand market opportunities and the required supply chain interventions to develop value-added goat meat products. The interventions required were identified at different points in the supply chain, across the chain. The findings from this report provide insights to guide research and development investment priorities and industry development activities by private sector, industry and governmental organisations. There is potential to develop value-added products and continue to supply to existing markets. An irregular supply-base means processors are unable to sign more lucrative, longer term supply contracts and develop high margin markets. Flow-on effects include boom and bust cycles of an oversupply and low prices with spot market buyers trading off against mutton prices. Innovative supply solutions combined with new product and market development provides an opportunity to break the commodity boom and bust cycles. Understanding value attributes in different markets and aligning the supply chain to meet consumers' needs, combined with innovation in processing is required to develop a sustainable, high-value, market driven supply chain.	Australia
Local Consumer Demands and Domestic Supply of Sheep and Goat Meat	Star et al.	2019	This study explored consumer demand for sheep and goat meat in Queensland by interviewing 25 butchers and retailers across regional and urban areas. Findings revealed that market demand varies by location, demographics, and tourism activity, with tourist regions showing greater opportunities for niche markets. Price emerged as a major constraint across the supply chain, leading some butchers to adapt by sourcing directly from farms or boxed meat, though these strategies were often unsustainable long-term. Fat content was less of a concern, but limited consumer cooking knowledge, especially among younger buyers, constrained uptake of certain cuts. The study highlights the need for industry to identify growth opportunities, enhance supply chain adaptability, and align production with evolving consumer and tourism-driven demand patterns.	Australia

Motivations and obstacles to goat meat consumption willingness: exploring influencing factors related to consumer habits and awareness	Hamad et al.	2024	This study surveyed 240 consumers in Algeria's El Oued region to examine motivations and barriers influencing goat meat consumption. Taste, low fat content, and perceived health benefits were the main drivers, while unpleasant flavour and aroma deterred some consumers. Willingness to eat goat meat was strongly linked to consumption frequency, cooking knowledge, and awareness of nutritional benefits. Stewing was the preferred preparation method, and sensory attributes significantly shaped consumer choices. The findings suggest that targeted marketing, education on health value, and promotion of diverse cooking methods could help boost goat meat consumption	Algeria
Relationship between Consumers' Perceptions about Goat Kid Meat and Meat Sensory Appraisal	Alcalde et al.	2023	This study explored Spanish consumers' perceptions and sensory evaluations of goat kid meat, a nutritious but rarely consumed product from young, low-fat animals. Surveys and home sensory tests with 30 families identified four consumer clusters: negative, idealistic, positive, and fat-conscious, each valuing production attributes differently. Tenderness, taste, and fat content were key quality factors, with older consumers prioritizing tenderness over flavor. The findings highlight widespread lack of awareness about goat production systems, suggesting opportunities for targeted marketing and education, particularly to engage younger consumers and regional market segments	Spain

