2022–23

Goatmeat Industry Update

Data used in this report

The Goat Data Collation and Tracking Project collates data from various sources. The information in this report should be interpreted with an understanding of the data sources and their limitations outlined in the *GDCT Data Guide*.

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Summary

In 2022–23, Australian abattoirs processed 1.98 million goats, a 22% increase compared to the previous year. This was the largest number of goats processed since 2016–17. The processing sector increased throughput in response to producers supplying more goats.

Over-the-hooks and export prices fell due to increased supply, international economic conditions and decreased demand for goatmeat from the United States and Canada. Despite this, the increased supply and lower price of Australian goatmeat encouraged notable growth in other export markets, such as China, South Korea, Japan and Trinidad & Tobago. The increased demand for Australian goatmeat in these markets presents market diversification and expansion opportunities.

Although the sector shipped the greatest volume of goatmeat to international markets since 2016–17, the value of exports dropped by 24% year-on-year to $225 million.

1.98M goats processed

$225M export value

24% decrease Y-O-Y since 2021–22

Production and supply trends

This year, the increase in the number of goats available for processing was supported by herd-building, enterprise development and favourable seasonal conditions in Queensland and New South Wales (NSW). The major production regions in Australia received average to very much above-average rainfall during the year (BOM, 2024).

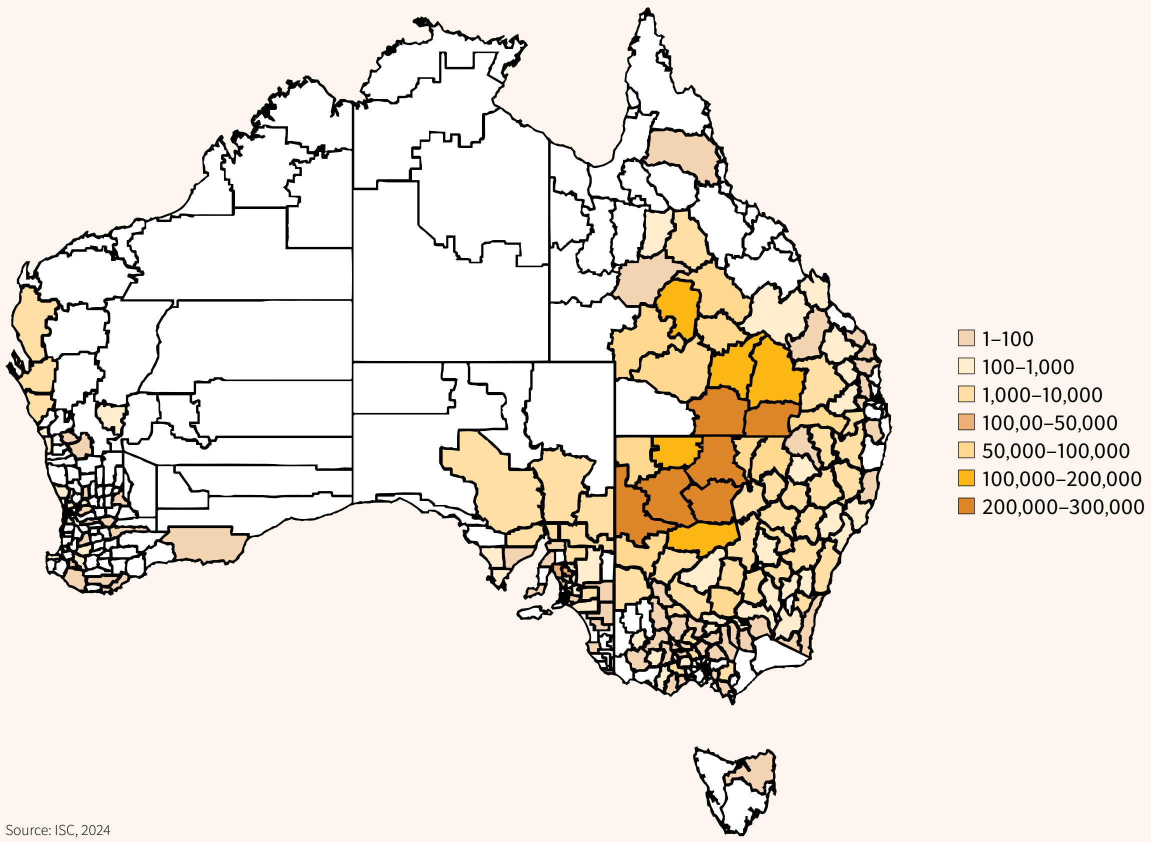
In the first quarter of 2022–23, producers faced greater competition for kill space and longer wait times when booking over-the-hooks consignments, indicating that goat supply was straining the processing sector's capacity. However, these challenges were concealed by wet weather conditions that reduced turn-off during quarter two. From October to December 2022, the supply chain was disrupted by wet weather that hindered mustering operations and caused transport issues when major highways (e.g. Cobb, Mitchell, Kamilaroi and Kidman Highways) and local roads were closed. During this time, at least three major NSW depots stopped trading or reported a marked downturn in throughput. The extremely wet conditions resulted in 39% fewer goats being processed in the second quarter than in the first quarter, which led to more goats accumulating on farms. Turn-off increased substantially when the wet weather effects eased in early 2023, encouraging the processing sectors to increase throughput further.

Table 1: Goats supplied for processing (2022–23)

State	Head	% change (from 2021–22)
NSW	823,538	-0.4
QLD	626,717	73
SA	82,887	-23
TAS	77	–
VIC	27,029	10
WA	21,598	-51
Total	**1,581,050**	

Note: Please refer to the *GDCT data guide* to understand the discrepancy between the number of goats supplied and the total processed (Table 2). Source: ISC, 2024

Figure 1: Goats supplied for processing from NLIS regions (2022–23)



Source: ISC, 2024

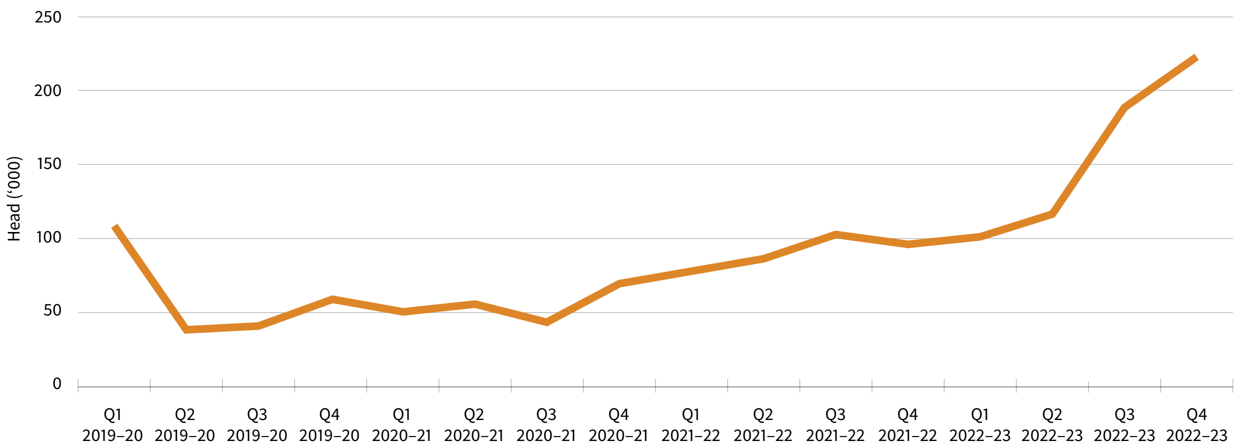
Queensland

Goat production from NSW and Queensland contributed approximately 89% of the national supply (**Figure 1**). According to Integrity Systems Company (ISC) data, the increased supply in 2022¬–23 was mainly from Queensland. The number of goats processed from Queensland properties increased by 73% compared with 2021–22 (**Table 1**), and the most significant supply lift occurred in the third and fourth quarters. In the second half of 2022–23, producers supplied over 400,000 goats, surpassing the total number of goats turned off during all of 2021–22 (**Figure 2**).

The Balonne and Paroo regions were the leading suppliers of goats in Queensland during 2022-23, with each region supplying more than 145,000 goats (**Figure 1**). There was year-on-year growth in supply across most of the western Queensland production regions, including Paroo (98%), Quilpie (349%), Barcoo (101%), Murweh (77%), Maranoa (96%), Balonne (52%), Longreach (83%) and Tambo (25%) (ISC, 2024).

Although a population estimate was not quantified in 2022, goat abundance in the Mulga lands, Mitchell grass downs and Brigalow belt bioregions of Queensland is almost certainly at or near its highest point since first recorded in 1983 (Atkinson et al. 2024). The Queensland Department of Environment did not record goats in their 2022 aerial surveys of kangaroos. The reasoning was that goats were so numerous in southwest Queensland that aerial survey observers would be distracted from counting kangaroos, their taxa of primary interest (T. Pople, personal communication, September 12, 2022).

Figure 2: Goats supplied for processing from Queensland by FY quarter (2019–20 to 2022–23)



Source: ISC, 2024

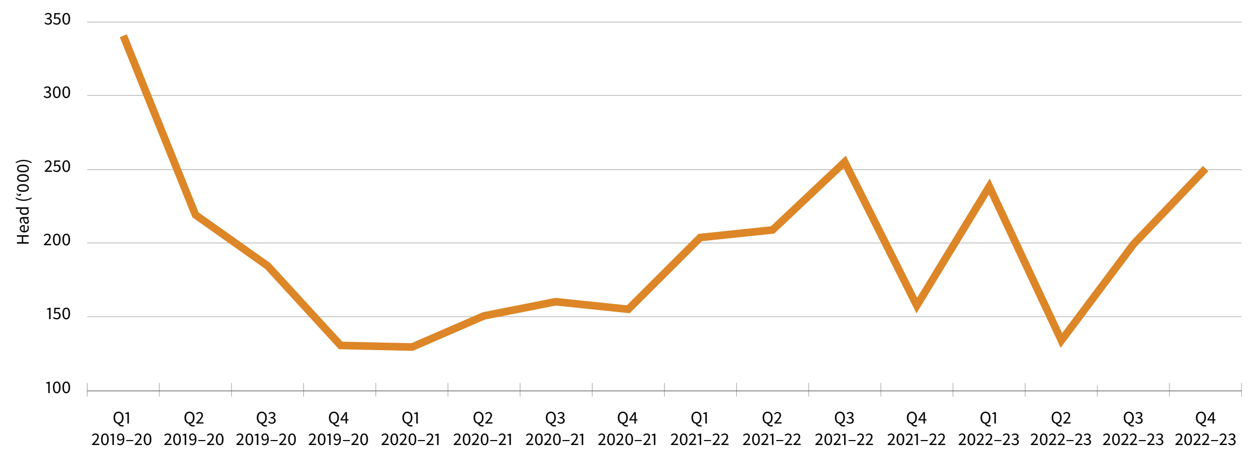
New South Wales

Goat supply from NSW was similar to the previous year (**Table 1**), but this should be interpreted cautiously because of the discrepancy between supply and processing total in 2022–23 (see The GDCT Data Guide for more detail). Nevertheless, it was evident in the first quarter that the availability of goats increased, with supply from NSW increasing by over 50% compared with quarter four of 2021–22 (**Figure 3**). However, high rainfall significantly reduced goatmeat supply in quarter two, and the impact potentially carried over into the third quarter. Although conditions for mustering and trucking improved in early 2023, some producers chose to delay marketing goats to focus on other activities they had postponed due to the wet weather. Most properties had an abundance of feed, so producers could sustainably carry additional goats while prioritising these other tasks. The number of goats supplied in quarters two and three of 2022–23 was 28% less than the same period in 2021–22. However, supply recovered strongly in the fourth quarter of 2023–24, with more than 250,000 goats marketed (ISC, 2024)

Supply from the Bourke, Cobar, Wilcannia and Broken Hill regions of NSW exceeded 100,000 head during 2022–23 (**Figure 1**). There was notable year-on-year growth in supply in some of the main western NSW production regions, including Milparinka, Wanaaring, Bourke, Brewarrina, Hay and Riverina (ISC, 2024).

According to population estimates from aerial surveying, goat abundance in central and western NSW reached its highest level in June 2021 since monitoring commenced in 1993 (estimated population: 6,867,600; range 5,750,600–8,201,700). Despite goat turn-off increasing substantially in 2021–22, the population estimates in 2022 (6,230,169; range: 5,162,196–7,298,144) and 2023 (5,031,233; range: 427,3915–592,2743) remained relatively high compared to historical levels (McLeod, unpublished).

Figure 3: Goats supplied for processing from New South Wales by FY quarter (2019–20 to 2022–23)



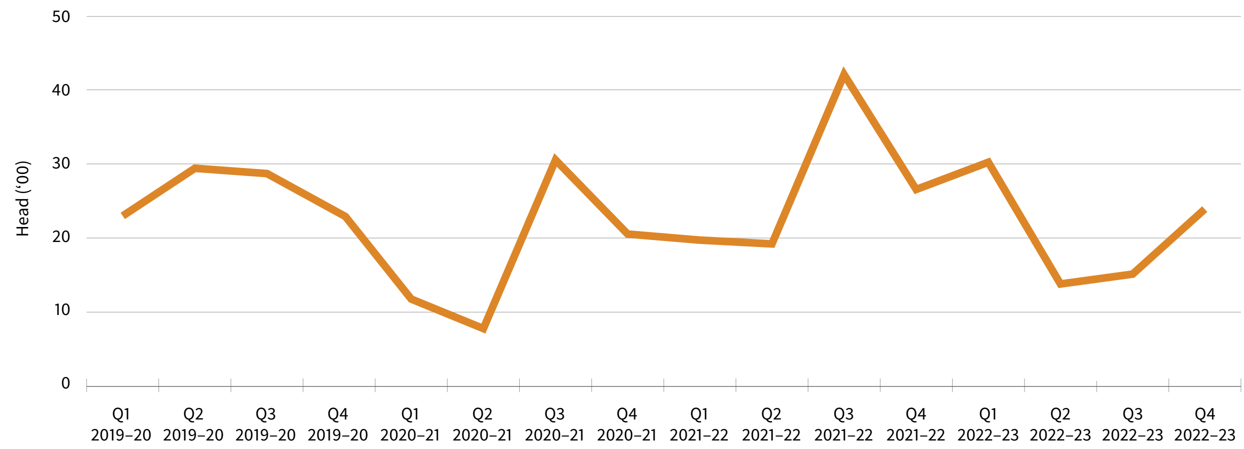
Source: ISC, 2024

Image credit: T. Atkinson

South Australia

The number of goats supplied for processing from South Australia (SA) and Western Australia (WA) declined compared with 2021–22, while supply from Victoria showed a modest increase (**Table 1**). In SA, the supply in 2022–23 followed a pattern similar to that of NSW, with the highest turn-off in quarters one and four, but with depressed supply over spring and summer (**Figure 4**).

Figure 4: Goats supplied for processing from South Australia by FY quarter (2019–20 to 2022–23)

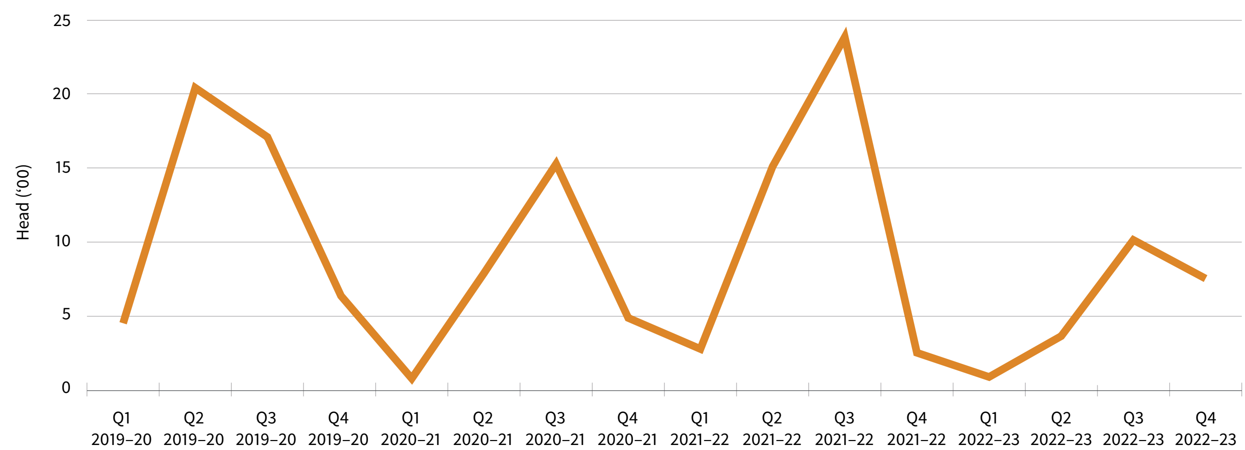


Source: ISC, 2024

Western Australia

Supply from WA typically peaks during the warmer months when conditions are suitable for wild harvesting (**Figure 5**). In 2022–23, goat supply for meat processing reached over 10,000 head in quarter three, but producers turned off fewer than 1,000 head in the first quarter (ISC, 2024).

Figure 5: Goats supplied for processing from Western Australia by FY quarter (2019–20 to 2022–23)



Source: ISC, 2024

Processing

In response to the ongoing high availability of goats, Australian abattoirs processed 1.98 million goats in 2022–23 (**Table 2**), achieving the largest number of goats slaughtered since 2016–17. The number of goats processed nationally increased 22% year-on-year and 84% since 2020–21. Goatmeat processing peaked in the fourth quarter when 642,584 goats were slaughtered nationally, which was the largest number of goats killed in a quarter since Quarter 3 2016–17 (**Figure 6**). Victoria, NSW and Queensland each slaughtered more than 110,000 compared to the previous year, contributing to the national increase in production, while WA and SA saw a decrease in goatmeat processing.

Table 2: Goats processed (2022–23)

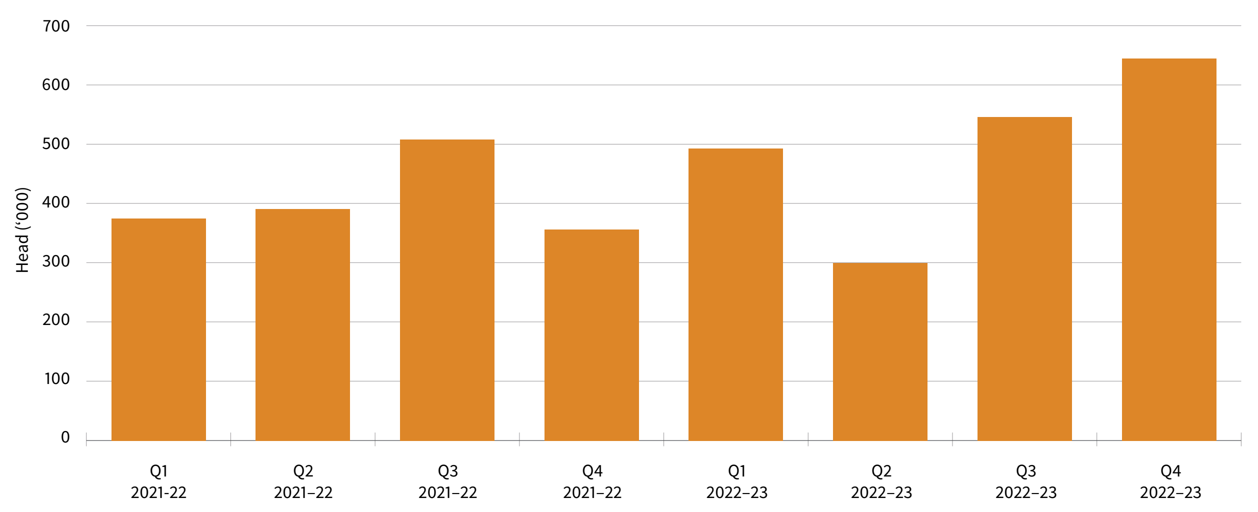
State	Head	% change (from 2021–22)
NSW	237,348	129
QLD	587,214	31
SA	178,268	-12
TAS	4	–
VIC	951,638	13
WA	22,448	-24
Total	**1,976,920**	**22**

Victoria continued to be the top goatmeat processing state, slaughtering nearly half the goats slaughtered nationwide. The state's processors handled 13% more goats compared with 2021–22. However, the proportional increase in processing in NSW (129%) and Queensland (31%) overshadowed Victoria's processing expansion (DAFF, 2023).

NSW abattoirs processed 237,348 goats, a record number since at least 2008–09. Thomas Foods International commenced operations at their Bourke abattoir in September 2022, which substantially enhanced NSW's processing capacity and contributed to the upswing in goats slaughtered in the state during 2022–23. The abattoir's reopening at Bourke is anticipated to contribute substantially to growing processing capacity for the sector over the long term (DAFF, 2023).

Goatmeat processing in Queensland has increased 95% over the last two years, driven by the widespread adoption of goat production and enterprise development in western Queensland. Abattoirs in Queensland went from slaughtering just over 300,000 head in 2021–22 to 587,214 in 2022–23 (DAFF, 2023).

Figure 6: Goats processed by FY quarter (2021–22 to 2022–23)



Source: DAFF, 2023

Price

The goatmeat industry experienced a considerable downturn in over-the-hooks (OTH) prices, signalling a sustained downturn in market conditions. In 2021-22, the average over-the-hooks price of goatmeat was 886c/kg carcass weight (cwt), but it declined to 488c/kg cwt in 2022-23 (MLA, 2024).

At the end of 2021–22, goatmeat prices peaked at 889 c/kg cwt. Although the price remained relatively high in the first quarter of 2022–23, it declined from the previous quarter to an average of 827c/kg cwt. The average price for the second quarter dropped sharply to 509c/kg cwt, signalling a notable change in the market. In the third quarter, the average price again fell steeply down to 312c/kg cwt, and this downturn was sustained in the last quarter (MLA, 2024). The average export price fell similarly to the over-the-hooks price, dropping from $12.91/kg in the fourth quarter of 2021–22 to $7.16/kg in the same quarter of 2022–23 (S&P Global, 2024).

While the increase in supply contributed to the price downturn, other contributing factors included international economic conditions and a decrease in demand for goatmeat from the United States and Canada (MLA, 2024).

Image credit: N. Leighton

Exports

In 2022–23, Australia exported the greatest volume of goatmeat, 25,968 tonnes (**Table 3**), since 2016–17. Goatmeat exports rose by 21% in volume compared with 2021–22, but their total value ($225 million) decreased by 24% due to changes in supply and export pricing conditions (DAFF, 2024a; S&P Global, 2024).

Exports to the United States, the biggest importer of Australian goatmeat, did not rise despite the increased supply and decreased price. Exporters traded 18% less goatmeat to the United States than in 2021–22. Additionally, trade with Canada decreased by 35% year-on-year. In contrast, other markets, including South Korea, China, Trinidad & Tobago and Japan, grew considerably (DAFF, 2024a).

Table 3: Goatmeat exported (2022–23)

Destination	Tonnes	% change (from 2021–22)
United States	11,442	-18
South Korea	4,629	77
China	3,973	4509
Taiwan	2,358	16
Trinidad & Tobago	1,195	58
Canada	957	-35
Japan	603	59

South Korea is a positive example of market expansion, as it has consistently increased the volume of goatmeat imported from Australia each year since 2018–19 (**Figure 7**). During 2022–23, exporters shipped 4,629 tonnes of goatmeat to South Korea, a 77% increase from the previous year and a notable 349% increase from 2018–19 (DAFF, 2024a).

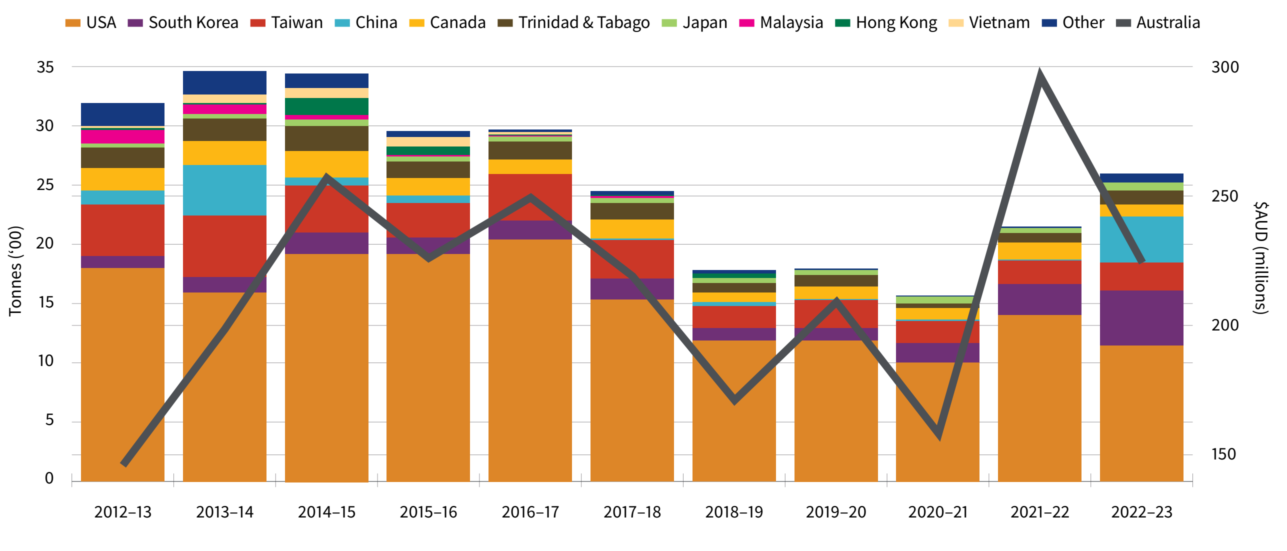
Since 2013–14, China has intermittently imported small volumes of Australian goatmeat, always less than 1,000 tonnes per year (**Figure 7**). For instance, only 86 tonnes were shipped to China in 2021–22. However, in 2022-23, China emerged as Australia's third-largest export destination, with imports reaching 3,973 tonnes. China's demand for Australian goatmeat rose in response to a lower trade price and zero tariffs as part of the China-Australia Free Trade Agreement (MLA, 2023).

The other two markets that grew substantially year-on-year were Trinidad & Tobago (58%) and Japan (59%), which have consistently imported Australian goatmeat for the past two decades (**Figure 7**). Exports to Trinidad & Tobago rose for the third consecutive year to 1,195 tonnes, the highest level since 2014–15. The volume of goatmeat exported to Japan has trended upward since 2008–09, reaching a record high of 603 tonnes this year (DAFF, 2024a).

In 2022–23, there were also 13,860 goats airfreighted live to international destinations that included China (6,752 goats), Indonesia (493 goats), Malaysia (5,466 goats), New Zealand (5 goats), Philippines (141 goats), Sabah (891 goats) and Sarawak (112 goats) (DAFF, 2024b).

To learn more about goatmeat export market, visit **mla.com.au/goat-snapshot-23**

Figure 7: Goatmeat exports (2012–13 to 2022–23)



Source: DAFF, 2024b; S&P Global, 2024

Forecasts

For the 2022-23 financial year, the Committee projected that the industry would supply 2.3 million goats for meat processing, a 50% increase from the previous year. The Committee flagged several factors and trends to monitor with their 2022–23 projection, including the capacity of processing and markets to absorb the projected increase in supply, price dynamics and the impact of wet weather.

The Forecasting Committee aims to estimate the number of goats supplied for processing within ± 10% of the actual total. However, their forecast this year had a -16% error. When the Committee met, it was unreasonable for them to have predicted the extent of the interference caused by wet weather. Still, they identified it as a factor that may affect their forecast. Without the disruption to supply in quarter two, the Committee's forecast would have likely fallen within ± 10% of the actual total.

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