

December 2022

Goat Data Collation and Tracking

Industry Update – Quarter 1 2022/23

Australian abattoirs processed 470,603 goats, a 33% increase from the previous quarter and a 25% increase from quarter one last year. While this is a solid start to the year, the total kill was below the National Goatmeat Forecasting Committees projections and last year's third-quarter processing peak of 502,251 head.

Processing by state

During the quarter, processing increased compared with the previous quarter in all states except WA (Table 1; Figure 1-5). Processing in Queensland, South Australia and Victoria was up compared with the same quarter last year but down in NSW and Western Australia. Queensland was the only state where the quarter-one processing total exceeded the kill in quarter-three 2021/22.

Queensland processed 135,379 goats in the first quarter, the highest level since quarter four in 2017/18. South Australia processed nearly 70,000 goats, maintaining greater slaughter totals than the low levels of 2020/21 and early 2021/22. Victorian processing bounced back to 245,254 head after the quarter four down-turn. In Victoria, Queensland and NSW, the number of goats processed in September declined substantially compared with August. In contrast, the number of goats processed in South Australia lifted sharply from 6,163 in August to 41,831 in September (DAWE 2022).

Table 1 The number of goats processed in each state during the first quarter of 2022/23 compared with the previous quarter and the same quarter last year (Data source: DAWE- 'Levy')

	Goats processed Q1 2022/23 (head)	% Change from previous quarter	% Change from the same quarter last year
NSW	19,695	3	-42
QLD	135,379	18	31
SA	69,889	46	133
TAS	2	-	-
VIC	245,254	44	19
WA	384	-77	-59
TOTAL	470,603	33%	25%

State ● VIC

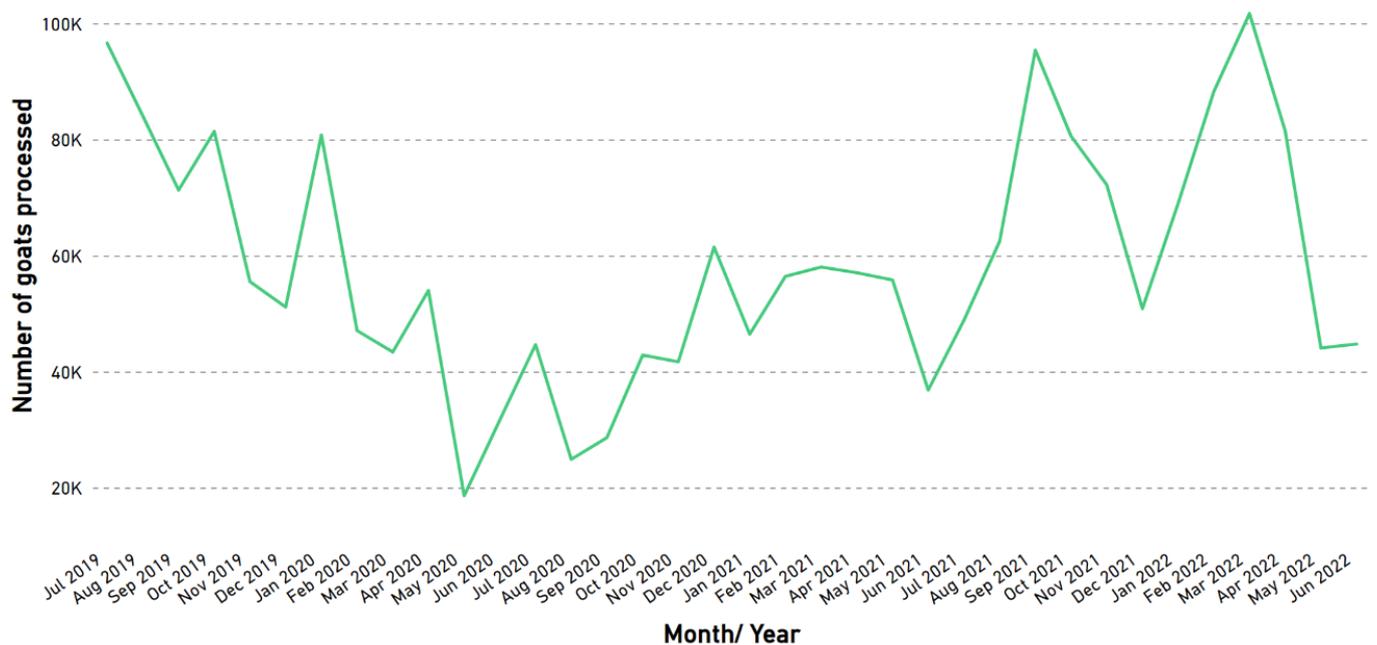


Figure 1 The number of goats processed in Victoria – July 2019 to September 2022 (Data Source: DAWE –'Levy')

State • NSW

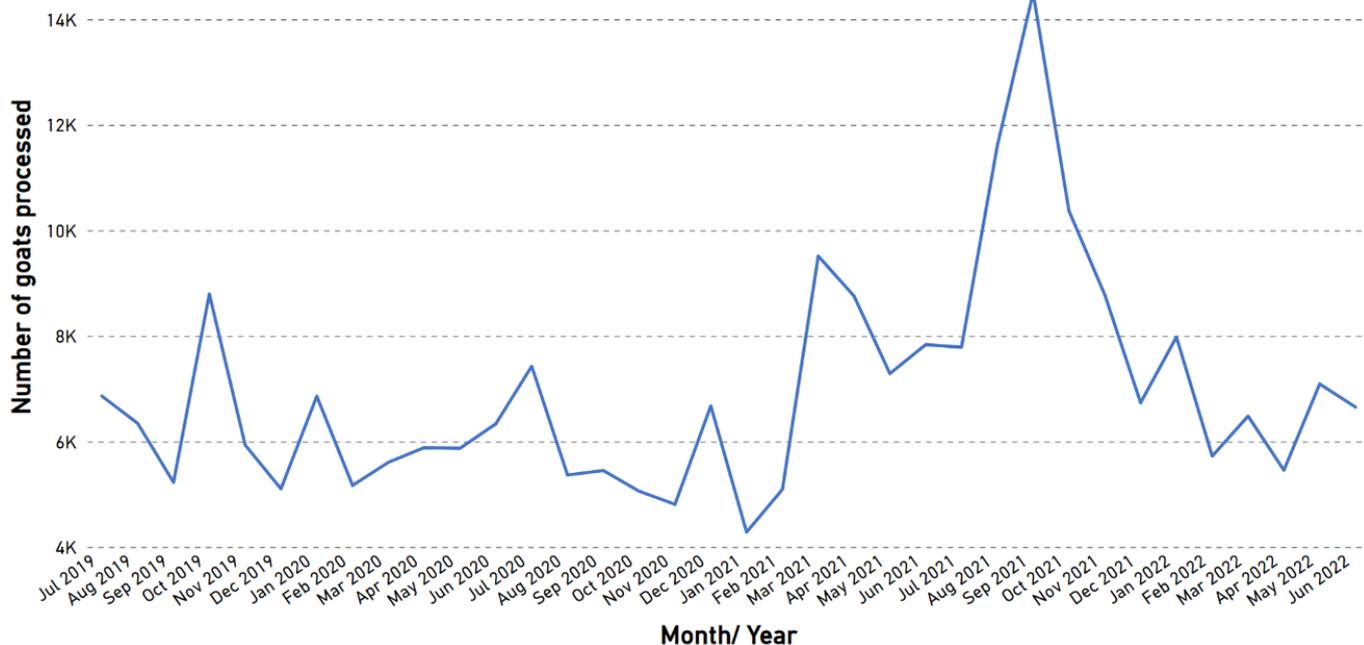


Figure 2 The number of goats processed in NSW – July 2019 to September 2022 (Data Source: DAWE –‘Levy’)

State • QLD

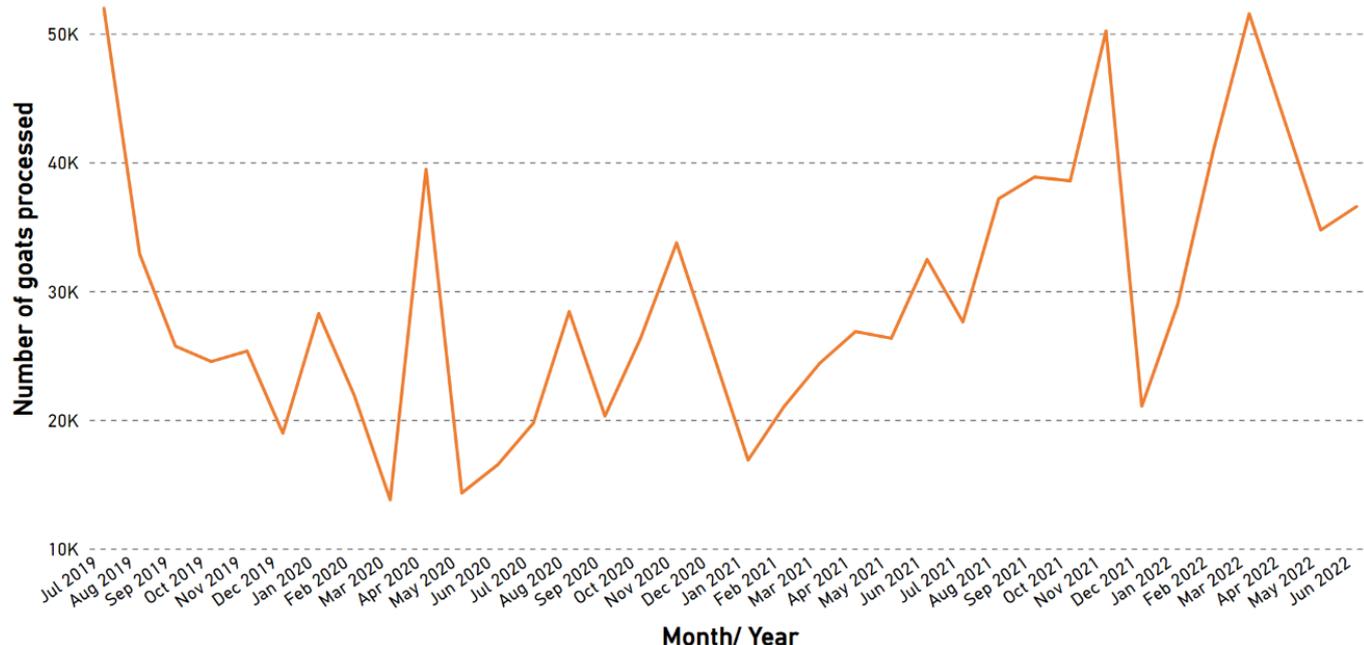


Figure 3 The number of goats processed in Queensland – July 2019 to September 2022 (Data Source: DAWE –‘Levy’)

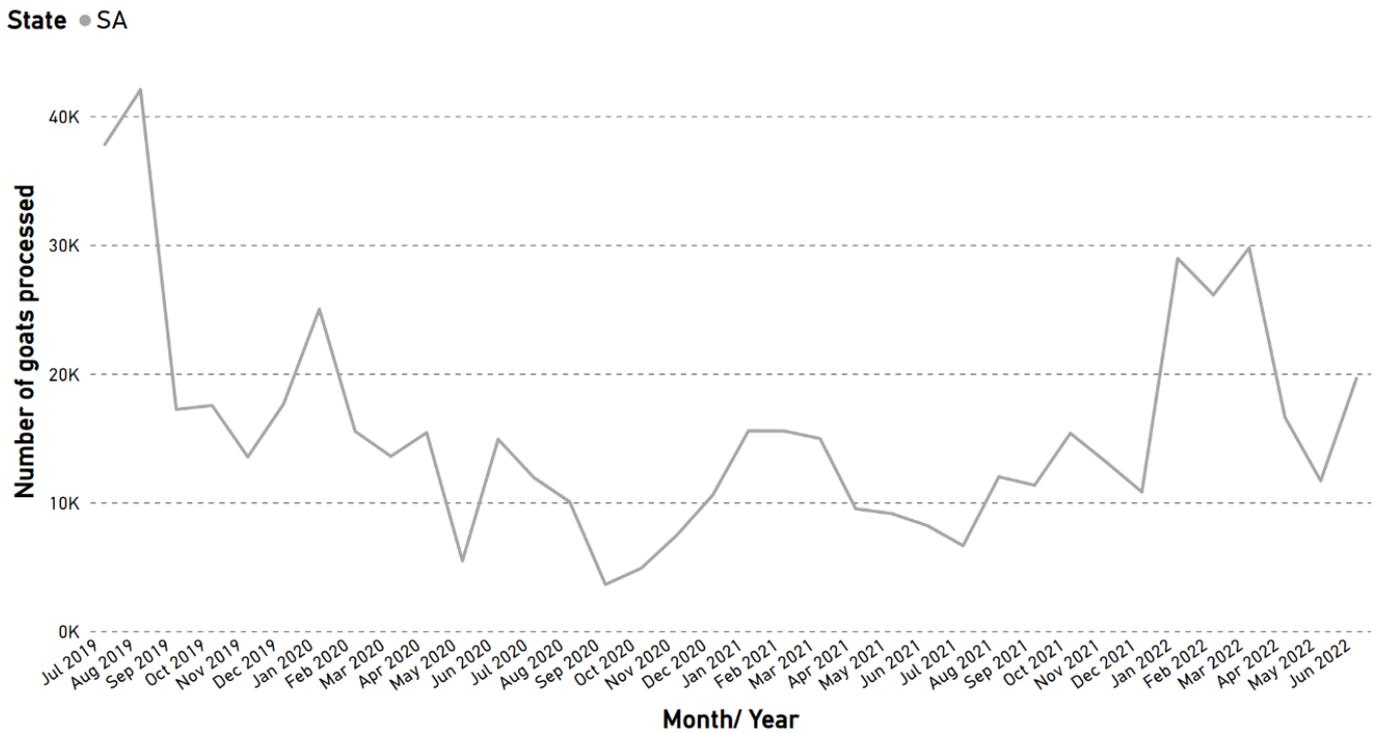


Figure 4 The number of goats processed in South Australia – July 2019 to September 2022 (Data Source: DAWE –‘Levy’)

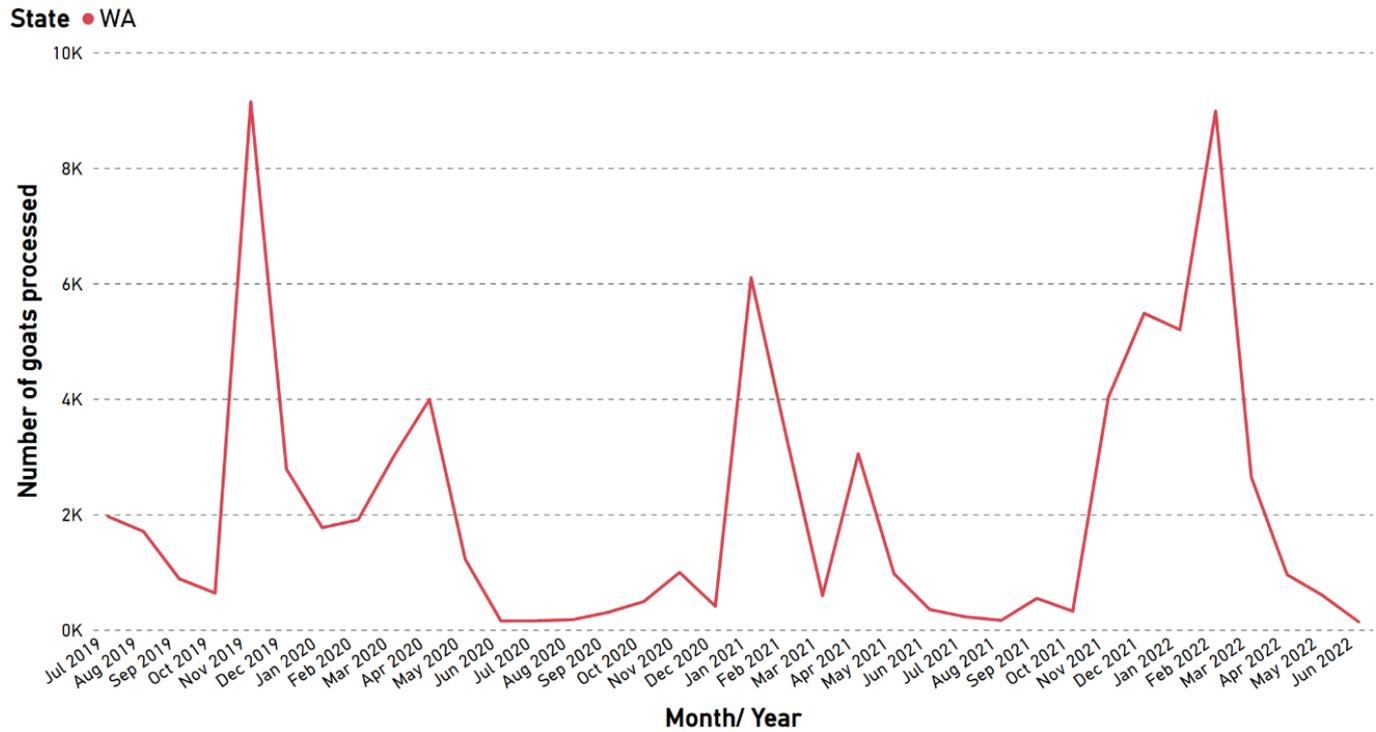


Figure 5 The number of goats processed in Western Australia – July 2019 to September 2022 (Data Source: DAWE –‘Levy’)

Supply by state

In the first quarter, the number of goats supplied from NSW and Queensland increased compared with the previous quarter (Table 2; Figure 6-9). Supply from NSW increased 29% from quarter four but was up only 4% compared with the same period last year. Queensland producers supplied 29% more than quarter one in 2021/22. South Australian supply increased by 38% compared with the same time last year. Producers from Western Australia supplied only 659 head. Lower supply is expected in Western Australia during the cooler months, but the trough was lower than the previous year (ISC 2022).

The difference between the processing (based on 'Levy data) and supply (based on ISC) totals for this quarter create some uncertainty about these trends.

Table 2 The number of goats supplied from each state for processing during the first quarter of 2022/23 compared with the previous quarter and the same quarter last year (Data source: ISC)

	Goats supplied Q1 2022/23 (head)	% Change from previous quarter	% Change from the same quarter last year
NSW	236,030	29	4
QLD	100,889	6	29
SA	27,153	-2	38
VIC	2,340	-14	-32
WA	659	-44	-70
TOTAL	367,071		

State • NSW

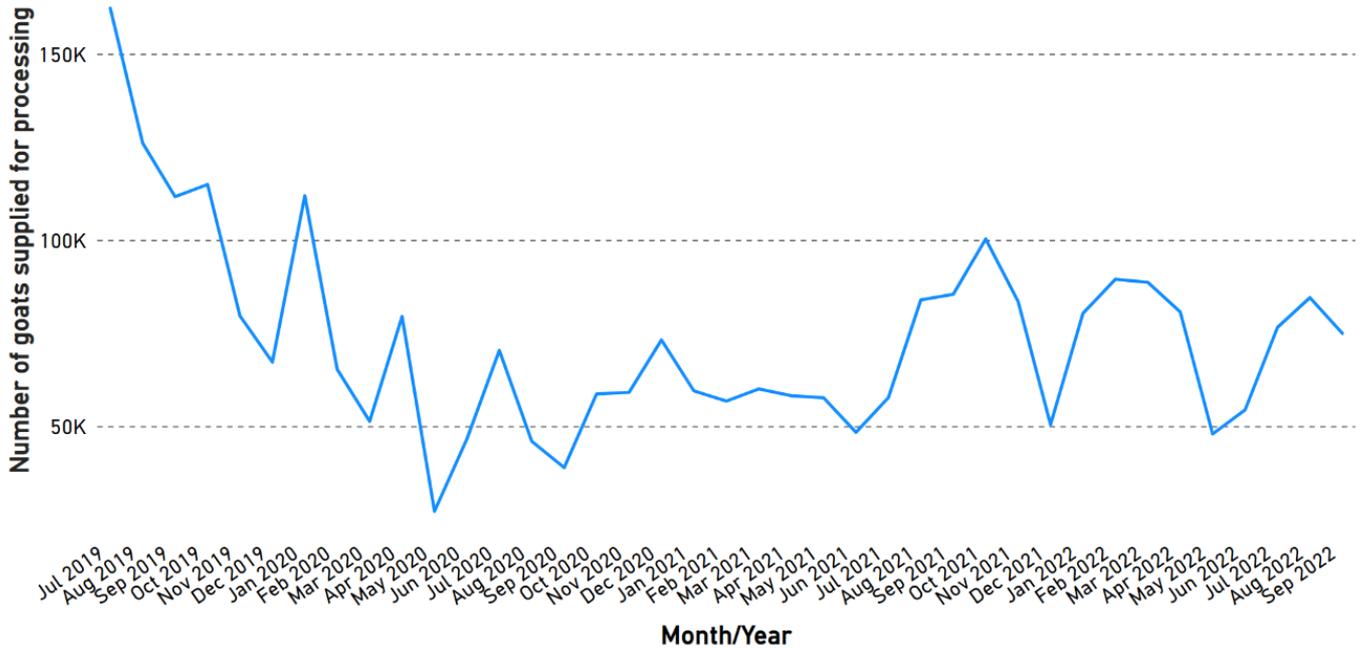


Figure 6 The number of goats supplied from NSW for processing – July 2019 to September 2022 (Data source: ISC)

State • QLD

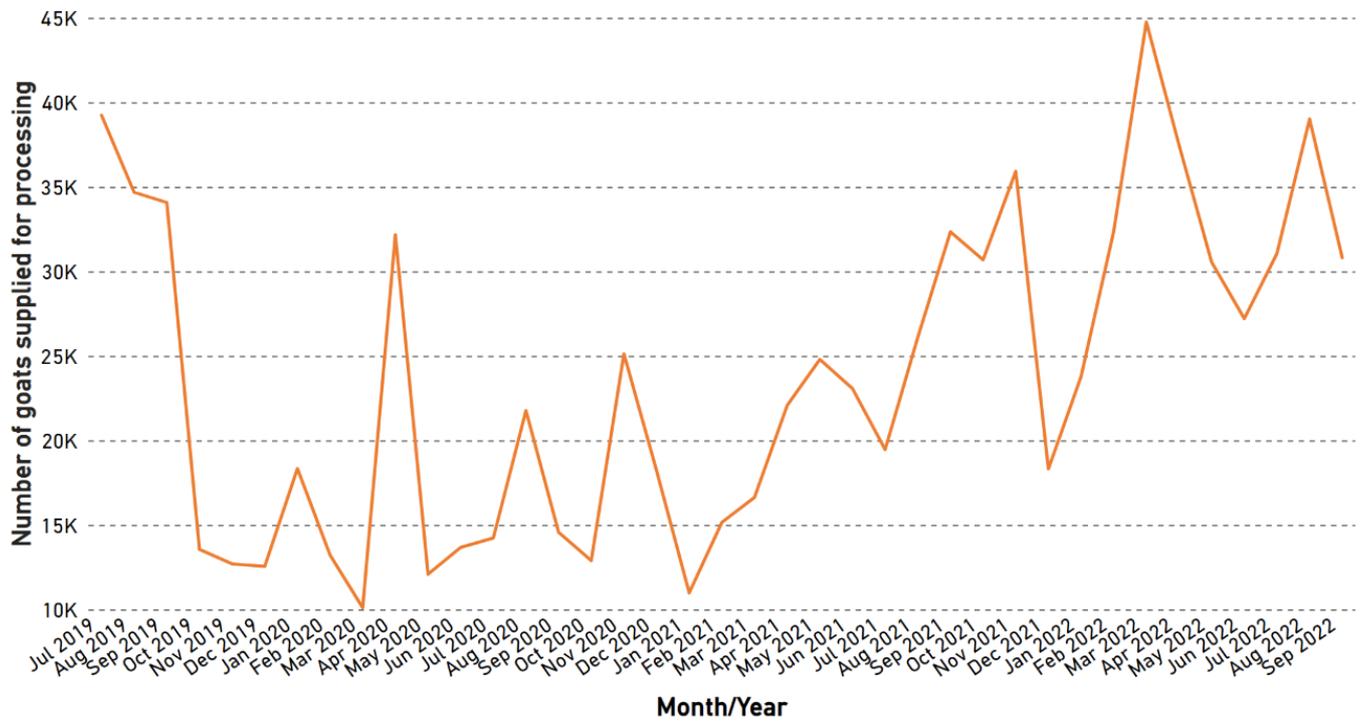


Figure 7 The number of goats supplied from Queensland for processing – July 2019 to September 2022 (Data source: ISC)

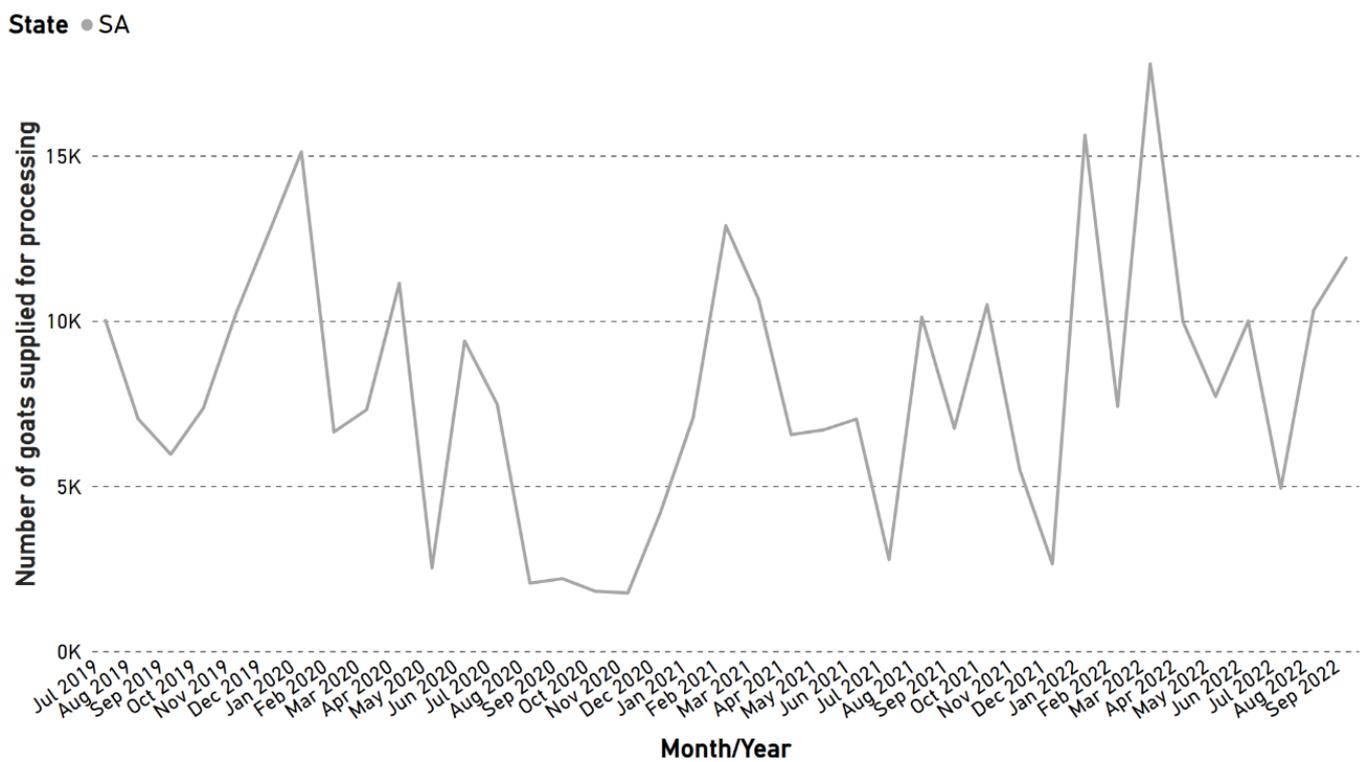


Figure 8 The number of goats supplied from South Australia for processing – July 2019 to September 2022 (Data source: ISC)

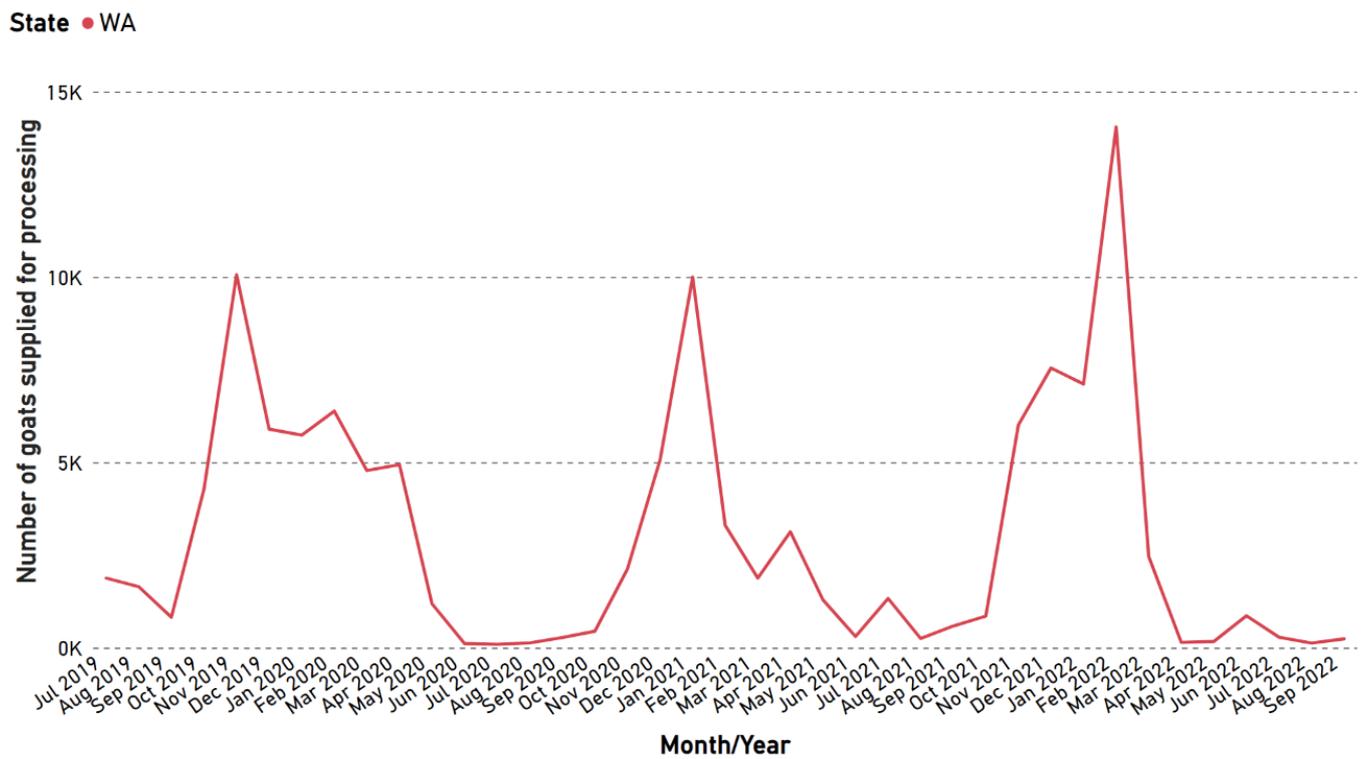


Figure 9 The number of goats supplied from Western Australia for processing – July 2019 to September 2022 (Data source: ISC)

Supply chain flow

Among the NSW goats sent to slaughter between 1 July 2022 and 30 September 2022, 38% were sent directly to processors, and the remainder were sold via a depot. South Australian producers consigned 57% of goats direct to slaughter. Nearly all (98%) of the goats coming from Queensland were delivered directly to processors. Western Australian goats were exclusively supplied directly to slaughter (100%) (ISC 2022).

Forecast Review

In the first quarter, the difference between the Committee's forecast and the number processed according to 'levy' data was -92,152 head (error 19%). There were factors that potentially contributed to producers marketing less goats than expected in quarter one. Some producers may have delayed marketing goats while they rationalised the price drop from 905 c/kg cwt on 1 July to 680 c/kg cwt on 1 October (MLA, 2022a). Also, rainfall, particularly in August and September hindered the mustering and transport of goats.

Exports

Australia exported 6,431 tonnes of goatmeat in the first quarter of 2022/23 (Figure 9). During the quarter, more goatmeat was shipped to the United States (US), Taiwan, South Korea and Japan than in the previous quarter (Table 3). South Korea received over 1,500 tonnes, exceeding the largest volume ever shipped to South Korea in a quarter by more than 700 tonnes. Exporters shipped 192 tonnes to Japan during quarter one, the highest total since quarter three in 2018/19. Although exports to the US were higher compared with quarter four and the same period last year, the total shipped was less than the peak in quarter two of 2021/22 when 4,654 tonnes were shipped. Exports to Canada and Trinidad & Tobago were reduced compared to the previous quarter but substantially up compared to last year's period (MLA 2022b).

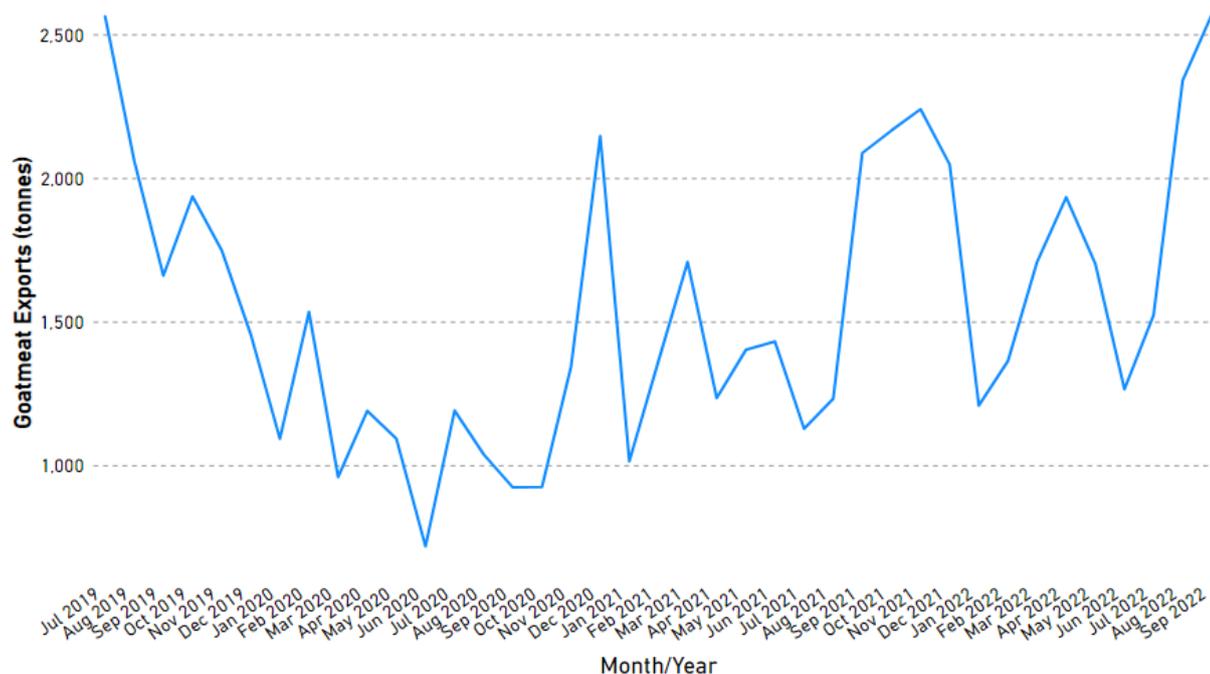


Figure 10 The volume of goatmeat exported from Australia from July 2019 to September 2022 (MLA 2022b)

Table 3 The amount of goatmeat exported to key destinations and the percentage change from the previous quarter and the same quarter last year (Data source: MLA 2022b)

	Goatmeat Exports Quarter 1 2022/23 (tonnes swt)	% Change from previous quarter	% Change from quarter three 2020/21
US	3,276	24	19
Taiwan	597	8	-6
South Korea	1,579	83	203
Canada	307	-11	69
Japan	192	132	36
Trinidad & Tobago	339	-5	207

Data Sources

Supply information is collated using unpublished National Livestock Identification System (NLIS) movement data supplied by the Integrity Systems Company (ISC). The processing information is collated using levy data sourced from the Department of Agriculture, Water and the Environment (DAWE). Hence, different datasets are used to report supply and processing trends. While the totals from each data set align, they are not expected to exactly match because the methods used to collect and collate the data are different. However, during this quarter, a considerable discrepancy

occurred between the Levy and NLIS data sets. Overall, the 'levy' data reported 103,532 more goats than the NLIS data.

References

DAWE (Department of Agriculture, Water and the Environment) (2022). Unpublished data 2022. Collated by the MLA and NSW DPI project - Goat Data Collection and Tracking project (B.GOA.0131).

ISC (Integrity Systems Company) (2022). Unpublished data 2022. Collated by the MLA and NSW DPI project - Goat Data Collection and Tracking project (B.GOA.0131).

MLA (Meat & Livestock Australia) (2022b). Over the Hooks report. Last accessed December 2022. <https://www.mla.com.au/prices-markets/oth/>

MLA (Meat & Livestock Australia) (2022b). Statistics Database. Last accessed December 2022 <http://statistics.mla.com.au/Report/List>

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