

NSW Goat Industry Summary

December 2016

Australian goat industry in global markets

- Despite small goat populations in Australia relative to the rest of the world, Australia is the largest goat meat exporter. This is primarily assisted by low domestic consumption and steady international demand, combined with the Australia's clean, green and safe image which is widely recognised in overseas markets.
- Major goat producers include China, India, Pakistan, Nigeria and Bangladesh (Figure 1). Australia supplied more than half of the world goat meat export volume in 2013 (Figure 2).
- While demand for goat meat from the Australian domestic market has reportedly increased in recent years, the majority of the product continues to be shipped to overseas markets, with an estimated 95% of Australia's total production exported (Meat & Livestock Australia).

Figure 1: World goat number - 2014

Unit: million head

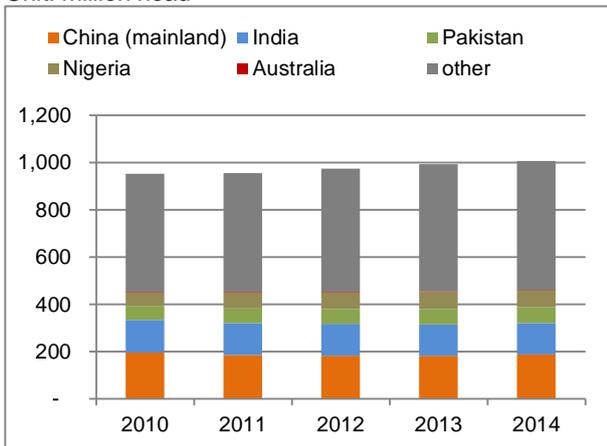
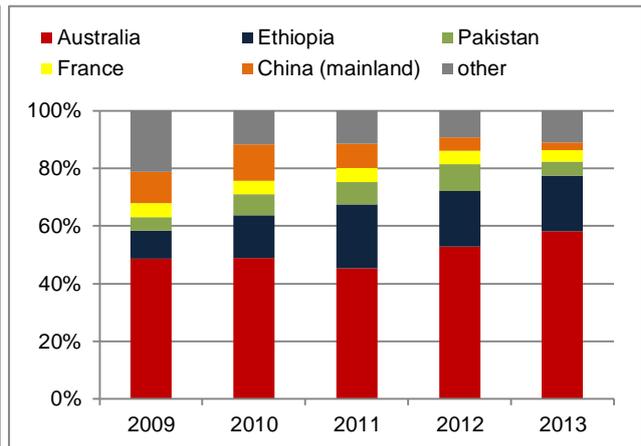


Figure 2: World goat meat exports - 2013



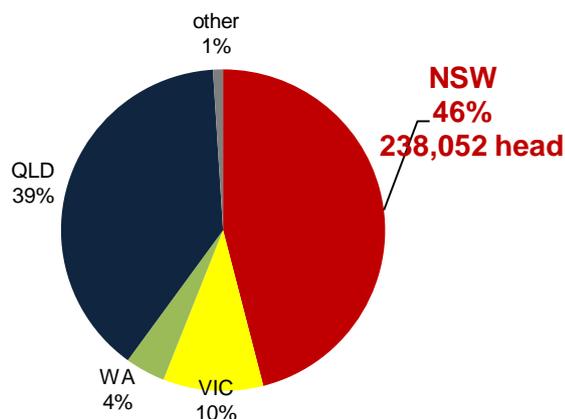
Source: FAO

NSW goat industry – supply

Opportunities

- According to the official statistics released by Australian Bureau of Statistics, Australian “managed goat” numbers in 2011-12 totalled 516,142 head.
- New South Wales (NSW) remained the largest state, at 238,052 head - or 46% of Australia's total (Figure 3).
- In addition, the number of “rangeland goats” in western NSW was estimated to be 3.38 million head in 2013 (Goat Industry Council of Australia).
- While goats in NSW are not necessarily processed or exported from the state, NSW significantly contributes to Australian goat meat production and live export.

Figure 3: Managed goat flock in 2011-12



Source: ABS

Challenges

- Limited availability of reliable data (of supply in particular) that is publicly available is a challenge for the Australian goat industry. It is vital to increase the availability of reliable information, not only to improve the sustainability of the industry, but to respond to high international demand. Recognising the importance of filling in information gaps, the NSW Department of Primary Industries' Agriculture division, in partnership with Meat & Livestock Australia, is leading a project to increase confidence and accuracy of data used in the Australian goat meat industry.
- There are goat export (along with domestic) accredited processing plants in NSW, however, it has been reported that not many plants in the state are currently processing goats. Hence, most goats in NSW are sent to either Victoria, Queensland or South Australia for processing and the meat products are distributed or exported from these states.

NSW goat industry – demand

Goat meat

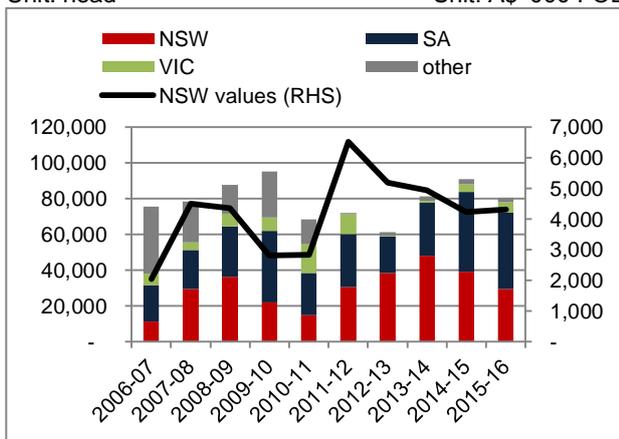
- Australian goat meat exports during 2015-16 totalled 29,543 tonnes shipped weight.
- The largest export market has been the US, with higher interest received from a few emerging markets, such as Korea and Vietnam.
- However, NSW is not a major goat meat exporting state, as most goats in NSW are sent to other states (Victoria, Queensland or South Australia) for processing and the meat products are distributed or exported from these states.
- In addition to meat goats, there are anecdotal reports of rising international demand for Australian dairy goat products.

Live goat exports

- NSW has been a leading state in live goat exports to international markets, with a trade value of A\$4.3 million Free On Board in 2015-16 (Figure 4).
- Australian live goat export in 2015-16 totalled 80,603 head, of which 37% (or 29,439 head) were exported from NSW.
- Like goat meat, some live goats in NSW are exported from other states – mainly from South Australia. South Australia represented 53% of Australia's total live goat exports in 2015-16, despite a smaller number of goats located in the state¹.
- While Malaysia has been the largest export market for both Australia and NSW live goats, increasing interest from emerging markets has been identified.
- In fact, the proportion of total goats export from Australia and NSW to Malaysia in 2015-16 was down year-on-year, at 89% (from 97%) and 83% (from 99%), respectively, driven by increased demand from other markets (Figure 5).
- A larger number of goats were sent to the UAE, the Philippines and Brunei from NSW in 2015-16.
- Other than the countries above, exports to Vietnam and Indonesia (from Victoria) improved during 2015-16.
- NSW Department of Primary Industries will continue working with the industry and the Australian Federal Government, to improve market access conditions.

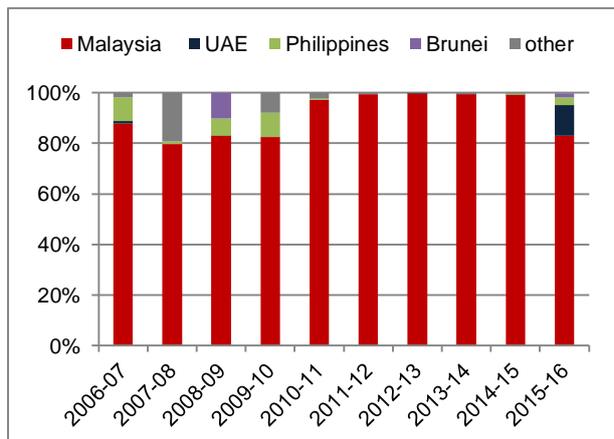
Figure 4: Australian live goat exports by state

Unit: head Unit: A\$ '000 FOB



Source: ABS, MLA / FOB - Free On Board

Figure 5: Proportion of NSW live goat exports



1 – South Australia also has rangeland goats, like western NSW.

More information

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Acknowledgments

Meat & Livestock Australia

References

Meat & Livestock Australia, Australian Bureau of Statistics, Department of Agriculture & Water Resources, Goat Industry Council of Australia, Food and Agriculture Organisation of the United Nations

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