

The Market for Goat Meat in Siouland

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Summary and Implications

A demand/supply mismatch characterizes the market for goat meat in the Siouland region of western Iowa. On-farm purchasing satisfies some but not all demand. The consumer market is small and growing, but also highly segmented by specific consumer preferences as to goat age, seasonal use, cut, and slaughter practices. The absence of fresh goat meat in retail outlets is a “catch 22” situation: more would eat goat meat if it were more readily available, but grocers who have stocked it report slow turnover and subsequent spoilage or expiration in the freezer. The ability of Iowa producers to capitalize on emerging demand is also limited by inexpensive imports from New Zealand and Australia.

Introduction

All signs point to goat: U.S. demand for the meat outstrips supply, recent immigrants to the Midwest favor it, and goats thrive in Iowa. Goats produce high quality meat, and over half of the red meat consumed worldwide is purported to be goat. Can billions of people be wrong?

Methods

We undertook research to learn more about the preferences of three groups of consumers (those who identify as “Latino/a or Hispanic” – referred to henceforth as Latinos; “Asian” – mostly Southeast Asians from Laos, Vietnam, and Cambodia; and “Muslim” – people of the Muslim faith from several countries) and the supply chain of producers, processors, distributors, and retailers.

We chose the Siouland urban area because of a sizeable recent immigrant population (mostly Latino), and growing community support for local food systems, in particular the new Floyd Boulevard Local Foods Market. We employed multiple methods – surveys, focus groups, and personal interviews – supplemented with literature review, census data, and what we learned from informal conversations during the course of the project.

We surveyed at two public venues in Siouland (a city-wide Cinco de Mayo celebration and an international food festival hosted by a church) and conducted focus group interviews at a Lutheran church, a Catholic church, and a Mosque. Churches were key partners, providing access to recent immigrants, a trusting setting, and meeting space and kitchens. Each focus group incorporated a meal featuring goat meat, typical of regional cuisines.

We used Spanish and English versions of the survey questionnaire. A college student who speaks Vietnamese interpreted for Asian survey takers. Hannah Lewis conducted the Latino focus group in Spanish, with help from a Guatemalan participant, and the Asian group in English with the translation assistance of a multilingual Laotian minister. The Muslim group was fluent in English.

A word of caution: we do not claim our results to be representative of larger populations. Rather, we highlight differences and similarities, point toward emerging patterns, and consider the extent to which our results conform to or deviate from expectations.

Results and Discussion: Consumer Preferences

Siouland Muslims eat goat meat most frequently, consistent with our expectations based on other studies. The Asians are the least frequent eaters – goat being expensive in their countries of origin and hard to come by in the U.S. – but would be as likely to eat goat meat as other meats, given availability and similar price ranges. The Latinos eat goat meat more frequently than Asians.

Demand for goat meat is seasonal, focusing on religious holidays and Iowa’s warmer weather months. Latino eating patterns are oriented toward festivities such as birthdays and parties, and Christian holidays and events such as baptisms. Religious holidays are also important for Muslims, such as Eid ul-Adha, a day on which Muslims sacrifice animals that have been deemed Halal, or fit for sacrifice, and share the meat with neighbors, relatives and the poor and hungry. Asian demand tends to be more independent of events and spread throughout the year.

We asked respondents how much they cared about several attributes: antibiotic free, hormone free, organic, humanely raised, freshness, and Halal. Freshness headed the list (tied with Halal, for Muslims). A majority of Latinos also care “a lot” about hormone and antibiotic free and humanely raised meat. Asians and Muslims care less about these attributes, although a majority of Muslims care “a lot” about hormone-free. Most respondents, across groups, had no preference for either pasture- or hay/grain-fed; most of those who stated a preference chose pasture-fed for reasons of flavor and animal health. One respondent elaborated: “In Mexico, they feed alfalfa, and goats grow healthy and clean.”

Just over half of Latinos and about a third of Asians and Muslims surveyed say they are willing to pay more for locally raised goat meat. In addition to freshness, their reasons include knowing how the animal was raised, food safety and health benefits, supporting farmers, and access to the entire carcass.

Cultural traditions support the preference for freshness. Latino focus group participants spoke of raising a few goats at home in the Mexican and Guatemalan countryside for

household consumption. Sometimes slaughtering is part of festivities. One Asian mentioned healing ceremonies in which traditional animists (people who worship the ancestors) kill goat. Goat is considered a “high status” meat in India and Pakistan, according to Muslim focus group members, and in Southeast Asia as well, according to Asian focus group members.

More Latinos purchase directly from farms than from grocery stores, and many prefer live goats to process themselves. In addition to guaranteeing freshness and a better price, they are able to purchase the entire carcass, for roasting whole, or to custom cut to their own specifications. Asians and Muslims tend to prefer the convenience of purchasing fresh processed goat meat in venues such as supermarkets. Some Latinos also prefer this convenience – focus group participants stated they’d prefer having the option of processed store meat and live animals.

A small majority across groups likes all cuts, as opposed to specific cuts. Ribs, leg and loin are favored by Latinos, and ribs, leg and shoulder by Asians. Muslim preferences are spread among these cuts, as well as fore Shank/breast and organs. We did not include “whole carcass” as an answer option; however, based upon focus groups, it is likely to have been chosen had we done so.

Younger animals are also preferred across groups, but more so by Latinos. Several individuals in each group also preferred an intact adult male. Weight preferences (expressed in categories of 15-25, 26-40, 41-60 and over 60 pounds) tended to correspond to age preferences, with Latinos most favoring smaller weights, the Asians greater weights and the Muslims in the middle.

Survey respondents also rank-ordered preferences for six meats. Among all groups, beef was most favored, and lamb was least favored (except among Muslims who rated lamb above pork). Goat was second in popularity for the Muslims, but ranked in the middle for Asians and Latinos. The Muslim focus group attributed the popularity of goat relative to lamb to their Pakistani and Indian roots, and suggested that Middle Eastern Muslims may prefer lamb to goat. The ranking of goat was likely influenced by serving goat meat in conjunction with focus groups and screening survey takers with the question “Do you eat goat meat?”

This same question reveals the greatest market limiter in Siouxland: goat meat is little known or appreciated by the majority population, “Anglos,” (whom we define as white people whose native language is English). Only the rare Anglo had ever even tried goat meat; those few had done so only once or twice, often in a restaurant meal. Some were aghast at the question; others indicated that had they eaten goat meat it would not have been on purpose. A stigma is associated with goat meat; goats collide with culture.

Results and Discussion: Supply Chain

A handful of Latino-owned grocery stores in South Sioux City carry frozen imported goat meat. No place carries fresh goat meat because, according to store meat

buyers, it doesn’t sell fast enough. One buyer refers customers wanting fresh goat meat to local farms.

The owner of a combination restaurant/grocery store in South Sioux City thinks he could profitably stock goat meat in his fresh meat case. He is emphatic about the value and superiority of fresh meat, and says he could sell fresh goat meat easily if he advertised; what doesn’t sell could be cooked in the restaurant. He plans to install a walk-in cooler before adding goat meat, purchased by the carcass, to his inventory. If this store could manage the requirements for Halal meat, it could potentially attract Muslim as well as Latino customers.

We identified a few cafés and restaurants that serve goat meat or have done so in the recent past, but the two Anglo-managed Mexican restaurants did not.

A majority of the Latino retailers/restaurants in our sample buy goat meat from a family-owned wholesaler in Sioux City, which distributes to Latino grocery stores and a few restaurants in Denison and Storm Lake as well. This distributor sells whole goat carcasses weighing 20 to 25 pounds, at a rate of about 50 carcasses per month. It buys at \$2 to \$2.50 per pound and resells at a slim margin for \$2.50 to \$2.60 per pound; goat meat is supplied mainly for customer convenience, to ensure the continued patronage of beef and pork buyers. The owner would carry fresh or locally raised goat meat if requested by customers.

The wholesaler sources imported goat meat from a USDA inspected lamb plant just north of Sioux City. This plant also sells between 100 and 200 fresh, locally raised goat carcasses per month at \$3 per pound to buyers in Minneapolis and Chicago. These buyers are interested in locally produced meat because it is fresh, not frozen. Buyers sometimes request carcasses with the head on because teeth indicate the age of goat; most buyers prefer lean carcasses weighing 25 pounds or less. Goats are sourced from local farmers in South Dakota, Iowa and Minnesota, and from the Sioux Falls, SD stockyard. The other livestock auction near Sioux City with active trade in goats is in Denison.

The lamb plant could double or triple the sale of fresh, locally produced goat meat by pursuing markets in New York City and Los Angeles. However, this has not been a priority for the plant, whose main business is lamb sales. To ship goat meat to national suppliers at a rate equal to potential demand would require an increased, consistent supply of market-ready kids through the year from local farmers. This would mean year-round kidding. The plant would also benefit from a market for offal and pelts to make goat processing more profitable.

A meat locker in west central Iowa slaughters the most state-inspected goats in all of Iowa. In addition to custom processing beef, pork, bison, elk, venison, lamb and goat for farmers and hunters, this locker has a retail meat shop. It has seen steady growth in demand for goat meat among Latino consumers in the past four years, but almost no Anglos buy goat. The meat is kept frozen and is sold by the whole carcass for \$3 to \$3.50 per pound, and can be cut in smaller

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pieces too. Customers request chilled (unfrozen) goat meat occasionally. The plant processes a few goats per month, which are sourced primarily from a single farmer. The plant substitutes imported goat meat when local supply is short, once a month or less. According to a long-term employee, there is no need for additional suppliers.

Only 17 goats were slaughtered under state inspection between October 2004 and September 2005, while the National Agricultural Statistics Service reports 13,000 “meat and other” goats (excludes dairy and fiber) on farms in Iowa in the same time period. These numbers suggest the

majority of meat goats are slaughtered in custom lockers and at private residences.

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