GOATMEAT INDUSTRY UPDATE REPORT

Goat Industry Data Collation and Tracking

Quarter 1 2025–26

Summary

The high processing totals achieved in 2024–25 continued in the first quarter of 2025–26, with the number of goats processed exceeding one million head for the fourth consecutive quarter. However, processors found it more challenging to source enough goats to maintain the high throughput. This led to reduced wait times for booking consignments, higher prices, and lower minimum carcase weight requirements. Exports reached a record-breaking 15,669 tonnes, with the United States and South Korea importing more Australian goatmeat than in any previous quarter.

Supply and production

Producers supplied 1.14 million goats for processing in the first quarter of 2025–26, maintaining a similar turn-off to the previous quarter (quarter four 2024–25). **Table 1** shows the breakdown of goats supplied by each state. Supply from New South Wales (NSW) propped up the national total, with turn-off rising by 30% from the previous quarter to more than 682,000 head (ISC, 2025).

From the fourth quarter of 2024–25 to the first quarter of 2025–26, NSW was the only state to increase supply. Turn-off in Queensland dropped by 8%, though at more than 320,000 head, it remained high compared with historical levels. The supply reduction was more pronounced in South Australia (SA), Western Australia (WA), and Victoria, with reductions of 59%, 60%, and 26%, respectively.

While total supply remained high, processors found it harder to source goats to maintain these high throughput levels. Whether this signalled a longer-term tightening of supply is uncertain. Short-term factors that can lead pastoralists to delay goat marketing did occur during the period, including rising prices, cooler weather, and the avoidance of mustering during kidding and lambing. There were also favourable quarterly rainfall totals, with most production regions receiving average to above-average rainfall – deciles 4 to 9 (BOM, 2025).

Some processors reduced minimum carcase weight requirements during the quarter, typically from 10 kg to 8 kg. This reduction increased the proportion of saleable goats within herds, thereby increasing availability. While this offers a short-term buffer against tighter supply conditions, lower minimum carcase weights can lead to lower reproduction rates, resulting in a longer-term decline in available goat numbers.

Table 1: Goats supplied for processing (quarter one 2025–26)

State	Head	% change (from quarter four 2024–25)
NSW	682,065	30
QLD	320,887	-8
SA	32,801	-59
TAS	0	–
VIC	8,332	-26
WA	3,561	-60
Total	**1,047,646**	**8**

Source: ISC, 2026
Note: Please refer to the GDCT data guide to understand the discrepancy between the number of goats supplied and the total processed (**Table 2**)

Processing

Australian abattoirs processed 1.14 million goats in the first quarter of 2024–25 (**Table 2**), keeping throughput above 1 million head for the fourth consecutive quarter (**Figure 1**). The high processing levels are being maintained due to the general high demand for goatmeat, alongside abattoirs shifting to or increasing goat processing to maintain throughput while the availability of sheep (mutton and lamb) is low. Processors were able to source sufficient supply to sustain the high levels, albeit at higher prices and lower minimum carcase weights (DAFF, 2025a).

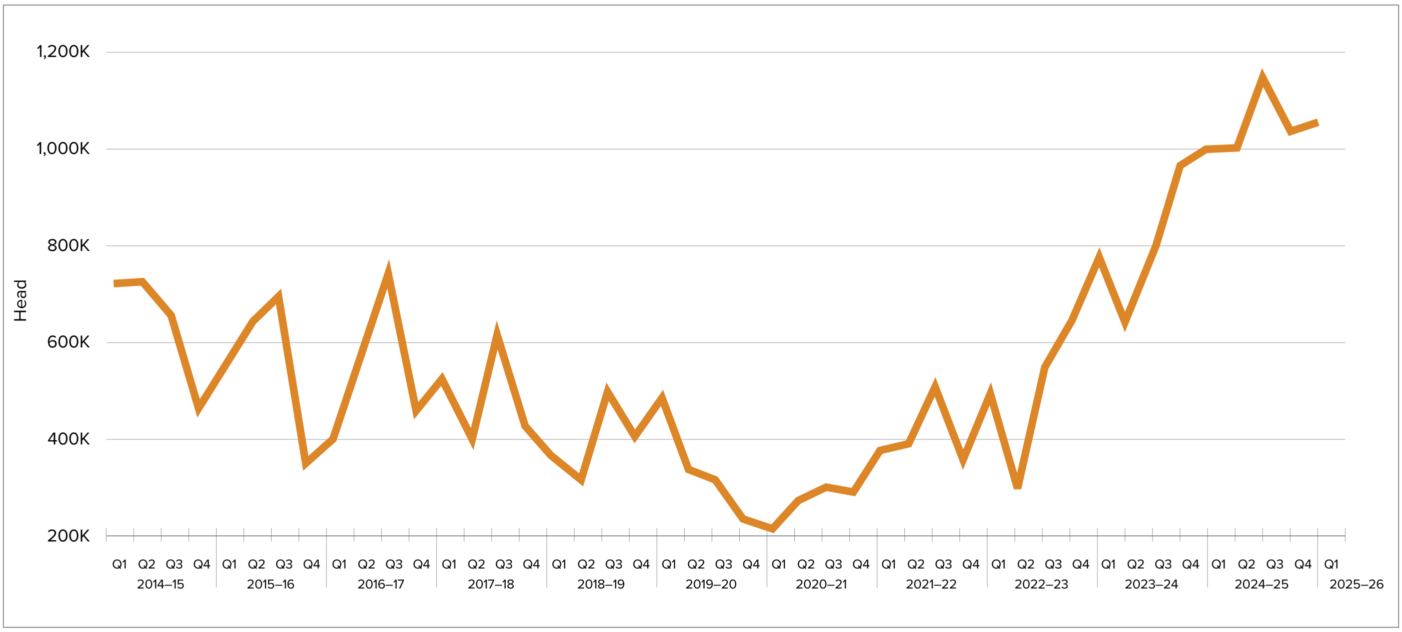
The number of goats processed in Victoria exceeded 500,000 head, an 18% increase from the previous quarter. Goat processing in NSW continued its strong growth trajectory, exceeding 300,000 goats slaughtered in a quarter for the first time. The number of goats processed in Queensland also reached a new quarterly high of 291,148 head. Processing totals in WA and SA fell by 71% and 33%, respectively, compared with quarter four of 2024–25 (DAFF, 2025a).

Table 2: Goats processed (quarter one 2025–26)

State	Head	% change (from quarter four 2024–25)	% change (from quarter one 2024–25)
NSW	304,392	10	15
QLD	291,148	10	9
SA	36,012	-32	11
TAS	2		
VIC	507,130	18	17
WA	2,475	-71	33
Total	**1,141,159**	**10**	**14**

Data source: DAFF, 2025a

Figure 1: Goats processed per quarter (Q1 2014–15 to Q1 2025–26)



Price

There was a substantial lift in the over-the-hooks price during this quarter. Meat & Livestock Australia's average over-the-hooks price lifted to 446 c/kg cwt from 296 c/kg cwt in the previous quarter. In September 2025, several processors released price grids offering above 550 c/kg cwt. The average export price also rose from $6.97 per kg in quarter four of 2024–25 to $7.84 per kg in the first quarter of 2025–26. This was the highest average export price received since the second quarter of 2022–23.

Export

Australian exporters shipped 15,669 tonnes of goatmeat to 30 trade destinations in the first quarter of 2025–26, achieving the highest quarterly volume on record (**Table 3**). This was 28% higher than the previous quarter and 21% higher than the first quarter of 2024–25. Increased demand from the United States and South Korea drove export growth, with both destinations importing record volumes of goatmeat in the first quarter of 2025–26 (DAFF, 2025b).

Consignment of goatmeat shipped to the United States and South Korea accounted for 73% of Australia's total exports. The United States imported 8,239 tonnes of Australian goatmeat in the first quarter of 2025–26, 80% more than in the previous quarter and 20% more than in the same period of 2024–25 (DAFF, 2025b).

Australian exports to South Korea totalled 3,130 tonnes, a 33% increase on the previous quarter and a substantial increase on the previous highest volume shipped in a single quarter (2,361 tonnes).

While export growth to the United States and Korea was strong, exports to other major markets, including China, Canada and Taiwan, declined compared with the last quarter of 2024–25 (DAFF, 2025b).

Additionally, during the first quarter of 2025–26, 10,424 goats were airfreighted live to overseas destinations (DAFF, 2025c), including Malaysia (8,194 head), Indonesia (162 head), New Zealand (8 head) and Sabah (2060 head).

Table 3: Goatmeat exported (quarter one 2025–26)

Destination	Tonnes	% change (from quarter four 2024–25)	% change (from quarter one 2024–25)
United States	8,239	80	20
South Korea	3,130	33	35
China	1,026	-11	-5
Canada	795	-13	12
Taiwan	589	-41	12
Trinidad & Tobago	496	-24	-14
Japan	220	-19	24
Jamaica	188	-50	333
Oman	142	187	0
Saudi Arabia	122	-35	0

Data source: DAFF, 2025b

Figure 2: Goatmeat supplied to the United States by FY quarter (Source: DAFF, 2025b)

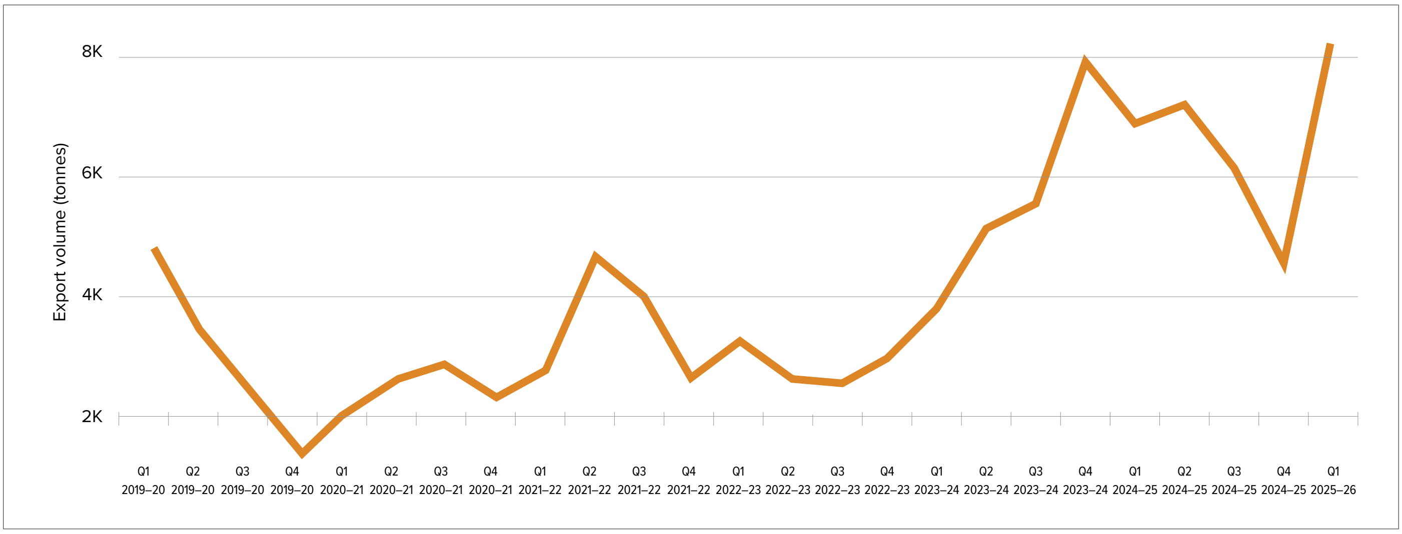
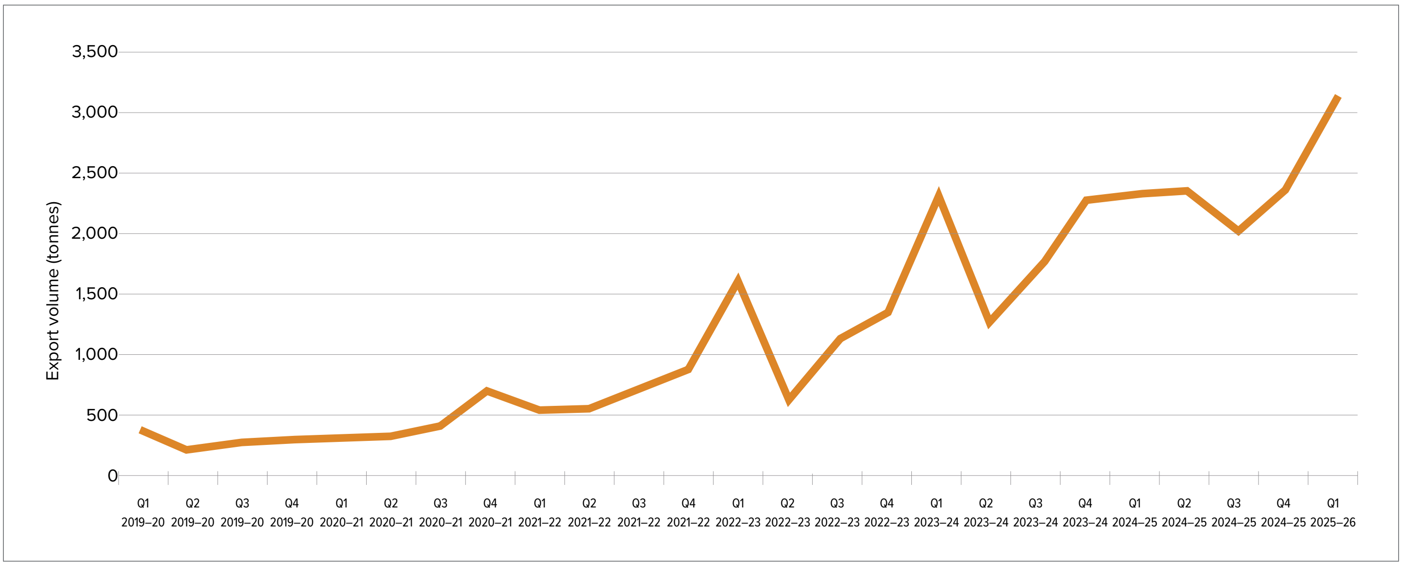


Figure 3: Goatmeat supplied to South Korea by FY quarter (Source: DAFF, 2025b)



Forecasts

The Forecasting Committee's forecast for the first quarter of 2025–26 had a 9% error, and the industry is on track to achieve the projected total of 4.16 million for the 2025–26 financial year. However, the Committee was more uncertain about the projected processing totals in the second half of the financial year than in the first two quarters of 2025–26, given its projection that supply would slow in 2026 and the range of options about when this may occur (Atkinson, 2025). The industry will no doubt be watching supply trends closely this financial year.

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