



Nuffield Farming Scholarships Trust

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**Growing and developing
a niche market for goat meat**

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•

To my fellow Scholars for their friendship, for their stimulation and sense of fun



1. BACKGROUND

I am a niche food producer, retailer and entrepreneur. I work alongside my husband, Tim, on our 110-acre tenanted farm in Cheshire. We have three active young children under 10 years of age: Grace, Amélie and Douglas.

I have a food and business background, and a degree in Spanish and Business Studies. Before working on the farm, I worked in the food retail sector for Bass Taverns as a food stocks trainer, and in airline catering as a purchaser. Back on the farm I run the butchery and am responsible for the cutting room as well as being a Director of Chestnut Meats.

Running a niche business is exciting as well as daunting. I like to describe growing a niche as “walking in fresh snow every morning; where the foot print you leave is unique”.

In 2006 we bought our first meat goats as an ‘experimental diversification’ and set off on an adventure, with the aim of growing a niche market for goat and kid goat meat.

Since then we have been promoting goat and kid as a healthy new meat to try. We have spread the word through a wide range of print and broadcast media – including The Independent, BBC’s Ready Steady Cook and BBC Countryfile, with John Craven eating our goatburgers. Today we own and run an internet business called Chestnut Meats, selling goat meat to wholesalers and the general public.



My reasoning behind applying for a Nuffield Scholarship was twofold:

Firstly, to talk to farmers and business people to find out how they grew their niche business, to help our business and also to help others who are considering entering a new marketplace or producing a new product. I wanted to learn from people who had already grown niche businesses and had a head start of 20 years on us. How did they do this? Could I persuade the British public to eat goat meat? Could we grow this business by learning from others and listening to their advice?

Secondly, to develop my interpersonal skills as a Scholar, to push myself outside my day-to-day role in the business and to question what we do and how we do it.



2. WHERE MY TRAVELS TOOK ME

The places I visited (June 2010 to July 2011) were located in the UK, The Netherlands, New Zealand and the USA.

The UK was a wonderful place to start looking into niches as there is an 'entrepreneurial spirit' here and an abundance of great food products to research. I looked into goat related products, like dairy produce, and met with niche producers, notably Delamere Dairies. Also, I interviewed an exotic internet meat business and made visits to Smithfield Market, Notting Hill Carnival and Brixton Halal Meat Butchers.

My next trip was to The Netherlands because of the large population of milking goats (230,000) as well as niche dairy manufacturers. I looked at their farming practices, including finding markets for billy kids with meat exports to Southern Europe. I also visited a Halal slaughter house to learn about Muslim practices and the importance of Halal meat, as well as to find out how the animals are slaughtered.

New Zealand was next on my itinerary. The country has a history of developing niche products and a reputation for having wonderful marketeers. I was keen to learn from the 'venison story' and how the meat had broken through as a food product sold into Europe.

Finally, I visited Texas, USA, which has a population of over two million meat goats. It also has a readymade market of Muslim and Mexican consumers. Here goat was to be 'more normal', rather than unique. With a perfect climate (hot, dry semi-desert) for rearing goats and a growing consumer base, what has the Texan rancher to lose?



3. WHY NICHE?

(a) A unique new market place

A niche business can set you apart and give you a new market place to operate in.

An example is First Light, based in NZ, which was started by Gerard Hickey and Jason Ross. They had worked for Bernard Matthews in the UK, but had become disenchanted by the commodity turkey, chicken, beef and lamb markets. They wanted to start something new and looked for gaps in the market place. The result was First Light; a business selling lean meats to Europe.

Director of First Light, Gerard Hickey, comments:

“Given the opportunity to start with a clean slate, we first looked and listened to the market. We then applied the basic principles which we, as individuals, believe in and set about building a supply chain to deliver on our promise.”

I wanted to ask why you would enter a niche market what were the advantages of doing so? What were the disadvantages of being a niche product?

(b) Monetary benefits

When you begin selling your niche product, if you are a key market player and there is demand, you may be able to command a premium. However, it is all about balance and knowing where in the market to pitch your price, after considering your costs of production.

If you are starting out in a new market, the price you are paid for this unique product may be higher than for a 'commodity product', but it much depends on when you enter the market.

Bob Kirk, from Springs Steps Dairies, UK, explained that when he entered the goat milk market he was being paid a premium for his product and it was an attractive market to be in. So there was a monetary incentive. At the time, farmers were being paid over 50p/litre for their milk – compared to only 17p/litre for our cow's milk – so it was attractive. Over time, farm costs have risen and this premium has been worn away. But the price of goat's milk has not fallen.

(c) Fewer competitors

Although the volumes are lower, being in a niche market generally means that there are fewer competitors and margins are greater. If you have something to sell that is unique, customers will come to you for that product and will be prepared to pay more for it.

(d) Pricing

Jason Ross of First Light talks about '*commanding your own price*'. When you talk to niche businesses, they talk of setting their own prices for their products. They are not in a commodity market where prices are dictated by others. They can work out their costs and add a margin to that.

Roger Sutton, Director at Delamere Dairies, had an interesting comment to make about pricing. He said that if they had sold the goat milk for 4-5p more per litre from the beginning it would have made a significant difference to the marketplace. When they began selling their milk, they wanted to be competitive with cow's milk, but this was a mistake. The supermarkets wanted their product



and they should have asked for more. (At the time that goat's milk was being sourced, there was a latent demand for alternatives to cow's milk for the allergies market.)

(e) Happy accidents

How many businesses spend time analysing a marketplace to come up with a new business idea?

The truth is that many niche businesses are happy accidents, or a series of ventures that people have tried, with only one taking off. Talking to some people it was apparent that success was merely a case of *'being at the right place at the right time'*.

An important trait and approach was adaptability. Preparing to let go is key - which, when you meet entrepreneurs, tends to be a recurring theme. Many are ideas people. They come up with new schemes every day. But how many work?

Roger Sutton struck me as an ideas man. He told me of numerous products, one of which was a flavored whey drink which he had come across in Switzerland. He even got a supermarket listing for it. However, sales in this country were not high enough and so it was withdrawn.

One product that has been a happy accident for Roger is milk for pets, which has seen year-on-year growth. The idea came from using goat milk as a supplement for kittens and puppies.

(f) Disadvantages of a niche

One problem with being a niche is the attention you attract in the industry, with the risk that you will eventually be copied.

Being a niche means you have a finite time to stay ahead, so to be successful as a niche you have to be able to adapt and change - and perhaps move on to the next project.

Examples of this can be seen with the Green and Black's chocolate and Starbucks Coffee companies. Green and Black's marketed ethical Fair Trade chocolate and eventually were bought by Cadbury. Starbucks started a trend of coffee houses across the globe, a formula which has been copied globally too.

Roger Sutton also made the point that he sells more sterilised cow's milk to corner shops than his total volume of goat milk sales, despite the fact that the margin on the cow's milk sales is smaller.

Although margins are higher for goat milk, the drawback of this niche is lower volumes.



4. KEY SKILLS FOR DEVELOPING AND GROWING A NICHE

(a) Product and business adaptability

Alternative Meats (www.alternativemeats.co.uk) based at Wem, Shropshire, set out by selling ostrich meat to the trade and general public. They soon realised, however, that there was a market for other exotic game, with customers asking if they could source zebra, kudu, crocodile etc. They adapted. They set about providing these meats and becoming a 'one stop shop' for all the lines.

As time has gone on, they now sell more British meats as demand has arisen and have specialised in supplying rose veal from Cumbria, along with suckling pig. In fact, rose veal is their best seller.

This to me demonstrates British tastes; we are conservative by nature and difficult to persuade.

(b) Recognising and following trends

Henk de Lang, from Ommen, Holland, is a good example of an entrepreneur. I met him on his organic pork farm (which runs alongside his dairy) where he finishes 5,000 pigs per year. Around 40% of these are sold in Germany, 40% in Belgium and the remaining 20% are sold as 'Vechtal Producten' which means 'local food'.

He analysed his farm soil and decided, as the land was poor, to put up a pig unit. He then set about associating himself with buyers that he wanted to work with and made use of free PR through the press to disseminate news from his farm to like-minded individuals he wanted to sell to.

Henk saw the changes in Government and the trend towards healthier local food for schools and the catering sector, and began promoting food from the local Vechtal Region. He has become somewhat of a food champion and encourages local producers to supply to this group for a small fee each year which he uses to promote their produce.

Having worked with a local butcher who was already selling free range meats, he also encouraged the butcher to become organic. As a result, the Herman Haverkort Organic Butcher at Zwolle was established and has never looked back. When it first opened, the organic shop was very much a niche in Holland, but now has a good following. This shop was busy and had a good customer base; to visit a totally organic butcher's shop was a first for me!

When Henk approached the butcher about taking organic meat over and above free range meat the concept was ground breaking. But the jump was smaller than for a conventional butcher to make the leap from conventional to organic.

His main ethos is to support farmers in a sustainable way, delivering ethically sourced, quality meats to customers.

(c) Researching the market

I visited with **Mrs Lindeboom** from Ommen, Holland to see her diversification project in the form of a small venison farm with 80 head of stock. It was here I became aware of an important factor when growing a niche business.

I had heard about her farm and knew that venison sold well to the restaurant trade in Holland. I



was surprised when she told me her business was not thriving as she couldn't compete with New Zealand imports and that the infrastructure that we enjoy here in the UK - consisting of farmers' markets, food festivals, etc - was limited around her. This made me realise how important pre-market research is and to ask: Can I sell this product? Do I have the skills necessary to do this? If not, can I buy or afford to bring this skill set in?

(d) Use of food channels and celebrity chefs

First Light said that they employed the help of a celebrity chef, Peter Gordon, to endorse their products. He had travelled with them to the US and the UK to meet customers to help out with product development. Through TV food programmes and the press, First Light has seen 70% growth year-on-year.

Pali Group in Holland came up with similar notions for market growth. Willem Jorissen from the Pali Group considered that producers in the UK have a relatively good chance to grow a niche because of the UK's cooking programmes. If you have people that are really excited about a product, it could take off.

Bettine (award winning goat's cheese producer) has also produced a goat recipe book called 'De Geit' in conjunction with the Pali Group. The book features cuts of kid goat and recipes for the meat. It also shows cheese from the different regions and a series of recipes, one of which is goat cheese wrapped in goat salami (which is delicious).

Door Sijf Brok, a celebrity chef famous in Holland, is involved in the above project and has spent a significant amount of his own time on kid meat and its promotion with the Pali Group.

"You really have to have an excited chef to talk about a new product, but then people will follow them, particularly if the product is out there and readily available for people to eat."

(e) Making the most of health benefits

In Hawkes Bay, New Zealand I visited **Woodburn Venison** which had some of the best packaging I had seen on a niche product. In addition, they had secured the use of the Healthy Heart logo on their venison with the recommendation of the New Zealand Heart Foundation. [Here in the UK, I have tried to talk to the British Heart Foundation to see if they will endorse lean meats, but currently they cannot.]

(f) Awards and accolades creates PR

A popular and proven way of developing a product brand is through awards. It's a great way to build public awareness and getting a product out there.

For example, the **Matoki Trust** in New Zealand enters their cheese for the NZ Cheese Awards, whilst **Delamere Dairies** enters awards like the Great Taste Awards to gain recognition and promote their products.



CASE STUDY 1

‘Building a brand’ - Delamere Dairies, Knutsford, UK

The Delamere Dairies’ story reads like a fairytale. Directors Roger and Liz Sutton have been running the business for 25 years, having grown it from nothing into a recognisable brand with a £15m turnover. It started from humble beginnings, with a handful of milking goats and making cheese on the kitchen table which they began selling successfully through their own ingenuity.

When they started, Liz went into Northwich and approached health food shops. One store was part of a chain which had 18 shops which Delamere began selling to. This resulted in taking their goat numbers to 200. By chance, Roger then contacted Simon Chantler, of Chantler Dairies, Broxton, when he saw his number on the side of a lorry.

Introductions were made and a meeting held, as a result of which Simon agreed to act as guarantor for a new milk processing machine for the goat milk. The milk was initially retailed in cartons using the Cheshire House brand, but Delamere subsequently created their own brand and marketed it to the supermarkets.

To do this they bought a grocer's directory and Liz went through the directory. The major trend at the time was towards healthy foods and Asda, who was receptive to supplying a range of milks, was the first supermarket to say yes.

After Asda came Morrisons, and then Tesco, selling six cartons three times per week to 10 stores. Delamere had only three to four staff at that stage and always bought in goat's milk from other producers in churns and little tanks, with producers delivering to Delamere.

Today, Roger and Liz are selling 100,000 litres per week with milk supplies coming in from nine British producers and a quarter of the milk supply coming in from Holland.

“It is important that someone in the UK buys milk from Holland,” says Roger, who believes this stops the Dutch entering the market of their own accord and backs up the UK supply. *“It also gives the UK an important balancing facility.”*

According to Roger, up to two years ago the market for goat milk was growing at 2% per month, but the market has now levelled off. Today, one in a 1,000 customers buys goat milk.

He says there is still work to be done on the nutritional benefits of goat milk. It is alleged to lower cholesterol, but the research to back up this claim up has not been carried out, so this cannot be put on the packaging.

“To make money, you need volume,” Roger pointed out. *“And, love it or hate it, most people chose to buy in supermarkets. If you want to get in with the chattering classes in London and if you get a supermarket listing, you also need the PR behind you.”*

“Our route to success has been the availability of our goat milk and getting it in the supermarkets.”



WHAT DID I LEARN?

- Sell something that people want.
- At certain times, success is a result of being in the market at the right time - so look out for gaps in market.
- If there is no market awareness, you will have to do the marketing yourself and this costs. You will definitely need a reasonable marketing budget.
- Don't be afraid of competition.



CASE STUDY 2

'Producing for a market demand' - Norman Kohls, N&K Ranches, Eldorado, Texas

This case study was interesting for two key reasons:

- To see goats being raised in a country where demand for meat goats was high.
- To see a farmer concentrating on making the best returns when the market price was high.

Norman Kohl produces commercial goats and show goats for the American market. But what is special about his set up is that Norman looks at the ethnic calendars and produces meat when a premium is paid.

"One hour from Houston is where our local Muslim population is," explains Norman. "Also, Boston and Philadelphia. But we cannot go in direct. They have their own mafia there". Norman has no choice but to sell in the market place at auction and cannot go in direct. But he does play the game well.

At the beginning of this report I asked: what have the ranchers to lose? Well they have other issues to contend with like drought, predators and fences, as well as issues of when best to sell their goat. Norman is a good example of a producer who has listened to the market and responded. And as farmers we need to do this in order to get the best returns.

"Their religion demands that they eat goat, especially in the spring when they have their holidays [before our Easter]. It doesn't matter if they have to pay \$5 per lb! They want goat," says Norman.

Table: Price differential and time of year

Time of Year	Live	Dead	Price	Total price to rancher	Equivalent to UK £	Price per kg dead weight
Kid, New Year onwards	70lb	35lb/15.9kg	\$2.26	\$158.20	£110.54	£6.95
Kid, Spring onwards	70lb	35lb/15.9kg	\$1.80	\$126.00	£90.00	£5.66
Cull nanny	140lb	70lb/31.8kg	\$0.70	\$98.00	£70.00	£2.20

At peak times - ie. New Year onwards - the ranchers in Texas are realising a live weight price of \$2.26 per lb, giving a price per carcass of \$158.20; or the UK equivalent of £6.95 per kg dead weight (before cutting and packaging). This is the key time to have kid ready.

This is definitely premium pricing and it doesn't make sense to sell to the retail sector as it is not competitive enough against the other meats on sale.

Norman also produces the Dorper for the Muslim market, but notices a great difference in growth rates: *"Dorper sheep get to market quicker and put on weight; no sprays, no pampering, and they are making me money."*

One thing I have come to realise, though, is how slow growing goats are in comparison to most livestock. But the benefit is that you are paid a premium for them as they are niche. Also they rarely over-fatten.



WHAT DID I LEARN?

- Look at the Muslim holidays and get your production ready for then, when demand is at its highest.
- There is considerable scope and opportunity to manage goat nutrition, together with the breeding programme - to produce a better liveweight gain goat and uniformity and to produce kids in blocks ready for market demand.



CASE STUDY 3

'Researching the market place' - Harry Kill, Commercial Director, Ozgazi, Etten Leur, Holland



Commercial Director, Harry Kill, at Ozgazi's soft cheese factory at Etten Leur, Holland.

Harry Kill was the director of Amalthea (a large milk buying co-operative group) for 20 years and helped grow the goat milk market in Holland. It was a privilege to meet with him.

Today he is the Commercial Director for Ozgazi, a producer of soft white cheese for the European Turkish market. Turkish people came to Europe for work and settled. For many Turkish people, soft cheese is a staple food product, being eaten at breakfast, lunch and dinner. Although, third generation Turkish Dutch are now eating more European food.

What I learned about this business was that it had looked at a market place to supply and had placed its business in the heart of the demand. And from there it was producing a good quality cheese and delivering it to a select ethnic group where there was demand for that cheese. Producing it in Holland was also key, as that is where the milk field is and also where their customers were located.

Ozgazi has five production factories in the European Union; three in Germany, one in Denmark and one in Holland. Their main product is like a 'feta cheese' - or white soft salad cheese – with production amounting to 35,000 kg per day. The product is packed in tins (and seeing one million tins in store was fascinating) but they are also trying to sell into a new salad market using vac pack and jars.

Ozgazi buys milk from farmers and from cooperative organisations in Holland. Harry pays 40c per litre for goat milk and can also buy spot milk. Sheep's milk is bought from France at up to 1.25 euro per litre. Cow's milk is 35c per litre. As a result, cow's feta is half the price of goat and sheep feta.

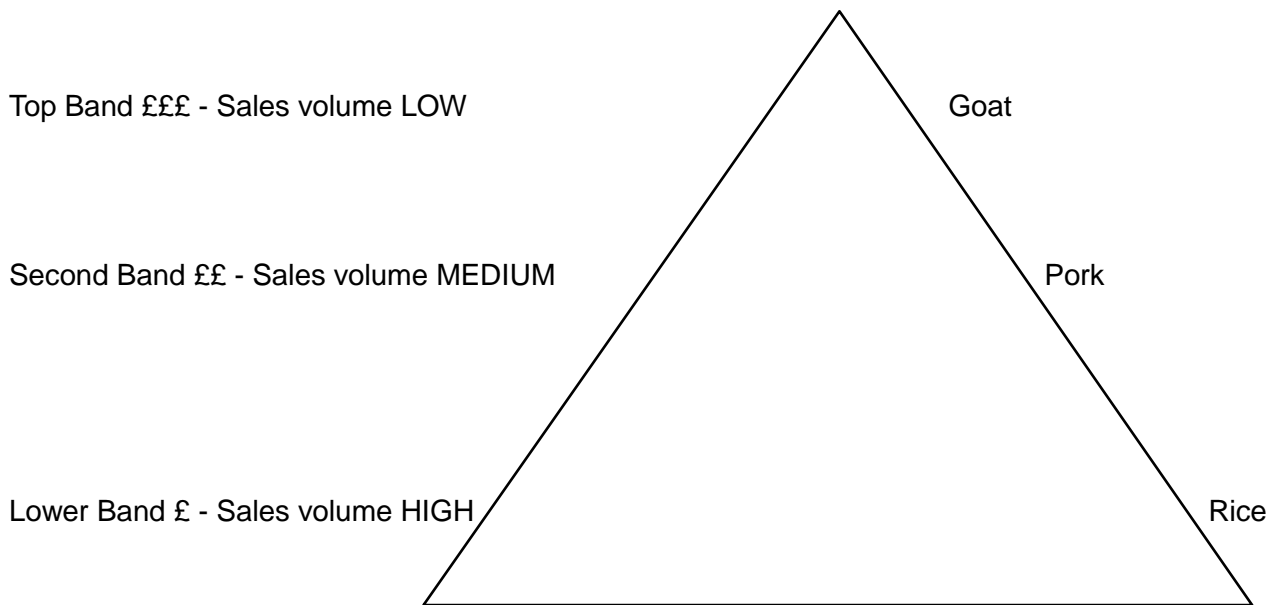
Always looking for cheaper ways to produce feta, cheese manufacturers sometimes add vegetable oil as a common practice, but NOT here at Ozgazi.

Sheep and goat feta have some health benefits, but it costs money to promote them. The principal supply is of cow's milk – around 80 million kg per year to make separated cheeses.



Diagram: The place of niche foods

Harry Kill describes a triangle of foods; the top band being a niche and expensive; the second band being a middle of the road product, such as pork; and the lower band represented by products, such as rice.



Rice is an everyday staple and relatively cheap, whilst meat is a more expensive product and in demand. For instance, pork would be eaten in most countries. Something like goat in the western world would definitely be considered a niche.

Harry Kill believes that it is very important to be in the middle section of the triangle. In a niche market there is always a possibility of sales, but they will only be as big as the market is.

He believes it is not so difficult to break through with a food product, but that you have to make use of what is happening in your own country/market. This is what Ozgazi has done with the soft cheese market. Today, together with Gazi, they have 85% of European market for feta cheese.

WHAT DID I LEARN?

- You need contacts in the industry and the help of some influential people - like chefs on food shows – to help promote your product.
- You need funds for promotion.
- 'Word of mouth' can be a big boon to sales of any new product.
- Volume sales will only be achieved by middle of the road or lower value staple products.



CASE STUDY 4

‘The Venison story’ - New Zealand

New Zealand has the largest deer farming industry in the world, boasting around 4,000 farms. It has around half of the global farmed deer population.

In the 1970s, as the industry developed, farmed venison was exported to Germany - where venison is served as part of the culinary tradition and is associated with the hunting season. In order to take advantage of both the low European import tariff on game meat, and the appeal of game products, at first no distinction was made between farmed and wild meat.

The New Zealand Deer Farmers Association was founded in 1975 and fought to ensure that farmed deer could not be slaughtered in facilities that processed sheep and cattle. This was to help preserve the image of deer as game animals different to farm livestock. Registered deer slaughter premises were subsequently set up where only farmed animals could be processed.

Venison was first exported as frozen basic cuts, such as the saddle. In the early 1980s, a meat distributor in Denver, Colorado, developed a cut where the back legs were boned out and packed as ‘Denver leg’, which became popular.

As a result of great advances in cutting plants and storage, venison cuts became increasingly marketed as chilled, rather than frozen. The venison is tenderised in vacuum pouches on its 4-6 week journey to Europe, making it perfect to eat on arrival, whilst also giving it a long shelf life.

Cervena branding

As export volumes took off, the Game Industry Board started a programme to differentiate farmed venison from wild game meat and launched the Cervena brand in the US and New Zealand in 1993. The protected label was limited to processing and exporting companies that met the Board’s standards of quality assurance and guarantees on animal age, processing and storage.

Venison trademarked as Cervena must be naturally produced, and processed in accredited plants. The animals must be three years old or less, raised free-range without hormones or steroids, and fed grass supplemented by natural foods like hay. There are also transport requirements.

The Cervena programme was funded by processors and the industry through levies with the aim of promoting farmed venison in the food and hospitality business. Marketing included promotions and cooking demonstrations, giving Cervena a high profile in the quality restaurant industry.

Heart Foundation Tick Programme

Additional differentiation has been achieved by New Zealand’s Woodburn venison, which carries the Tick Programme logo sanctioned by the New Zealand Heart Foundation. It can use the logo (see page 16) on all its products to help promote the eating benefits to the public.



The Heart Foundation Tick Programme has nutrition criteria for 57 different food categories. The criteria are specific to each different food category, to take into account the different nutritional profile of foods (eg. meat is very different to vegetables etc.).

The Tick Programme has specific nutrition criteria for 'plain meat' and 'processed meat'. The 'plain meat' category includes beef, veal, lamb, mutton, pork, rabbit and kangaroo. The meat must be presented as plain and unprocessed, and may be fresh or frozen, vacuum packed, chopped, sliced, diced or shaped into patties. The 'plain meat' criteria specifies that meat must be 'trimmed of all visible fat' (i.e. visually lean) and have a 'saturated fat content of 4g/100g or less'.

The Tick nutrition criteria limits negative nutrients such as saturated fat, trans fat and sodium, and aims to increase positive nutrients such as fibre and calcium, in relevant foods. The Tick also sets a limit on kilojoules (energy) in many food types.

In the 'plain meat' category, they focus on low saturated fat, as it is the saturated fat component of the meat which is associated with heart disease.

The Heart Foundation Tick Programme is supportive of lean meat consumption because eating lean meat does not increase the risk of heart disease.

Ups and downs of venison

The venison business has always been a 'feast or famine' affair, with big variations in price. This is largely due to the small market, fluctuating supply levels and the industry's inability to match supply with demand.

Where does venison go?

The best market for exported venison has traditionally been in Europe before Christmas. The highest prices have usually been paid to New Zealand deer farmers from September to mid-November.

Between 2002 and 2006, the proportion of New Zealand venison exported to Germany remained at about 40%, although total volume increased. Belgium and the Netherlands are important entry points for venison into the European Union. Both Scandinavia and North America have increased their intake of the meat.

I met with First Light Venison who operated with the European markets in mind, but also supplied the domestic market (Woodburn Venison). Gerard Hickey whom I have mentioned earlier in my report had used his background from working with Bernard Matthews and had applied his knowledge to the venison business. For First Light, understanding the customers' needs is key to success. For instance, the UK retailers don't like velveting and consider it to be an animal welfare issue, as a result of which First Light made a point of being a 'non-velveting' company. (First Light currently supply Waitrose, Tesco, M&S). Then secondly they used "dovetailing supply" to fill a UK demand for six months of the year and this works extremely well for both First Light and British farmers. This meant they did not step on the toes of the British farmers and filled the supply gaps. Thirdly, they used every part of the carcass and found markets for it.



Waste not, want not is very much their philosophy and this applies particularly to the carcasses – which have additional aphrodisiac and medicinal value. The blood is used, as are the reproductive parts and tendons, whilst the skins are sold to the fashion industry. As result, little is wasted from the slaughter process.

Finally, the market is First Light's primary focus. They don't own any of their seven processing plants. They have been a success through securing supply and focusing attention on the markets.

Exports

The total value of New Zealand exported venison in 2007 was \$260 million which is small when compared with the export value of dairy, beef, lamb and wool. Please see table:

2007	Wool	Dairy products	Venison	Beef	Lamb
Export value	\$686 million	\$8.41 billion	\$260 million.	\$1.81 billion	\$ 2.25 billion

The statistics demonstrate how 'niche' venison is - even though as, a product, we consider that it has broken through to the mainstream.

WHAT DID I LEARN?

- There always needs to be a balance between 'supply and demand' for the product to stop producers getting even lower prices for their product
- As non-levy payers, meat goat producers must go it alone with marketing
- You can grow kitchen table business into to a multi-million dollar business
- Bigger is not always better



Pictured above is an example of a chef promoting venison in Germany. In particular, he is showing the health benefits and the quality, whilst also giving the public ideas on cooking the meat.



The Tick logo



CASE STUDY 5

'Where there is milk there is meat!' - Willem Jorissen, Pali Group, Holland



Goat carcasses, Holland.



Willem Jorissen of the Pali Group.

Two by-products result from raising goats: billy kids for slaughter and cull goats for meat. Hence where there is milk, there is meat.

The Pali Group - which originates from the Paridaans and Liebrechts livestock trading companies in Brabant – began trading in livestock 50 years ago, initially buying in new born calves and rearing calves for slaughter, followed later by pigs and goats.

Their model in the veal business developed into a wholly owned plus a contract rearing system, renting farms and having contracts with farmers who were supplied with all of their requirements (feed, medicines etc).

The idea of rearing kid goat and selling goat meat came from the milk buyer Amalthea, who approached the Pali Group specifically because of their background in veal rearing. They had a problem with billy kids. They did not like the wastage – or the possible welfare perceptions – linked to kids being gassed.

The fattening of billy kids by Pali began on a small scale, with just one or two farms in production. The next move was to scale it up to include all milk goat producers in Holland. Today, 75,000 to 90,000 kids are reared each year and sold for 30 euros each into the European market, particularly France, Spain, Portugal and Greece. This turns over 2,250,000 euros.

Initially the billies were sold live, but having encountered problems with mortality in transit and due to changes in export controls regarding disease, nowadays the Pali Group is slaughtering greater numbers in Holland.

Kid goats will generally stay on farm for three days before going to the fattening farms. Sent in batches, the farmer will receive 2-5 Euros per kid goat.



The rearing and fattening process is very labour intensive work, with farmers being paid 8 Euros per animal for six weeks of work. The milk, bedding and the medicines are paid for by the Pali Group, which also provides important training.

At six weeks, the kid goat is sold having reached a dead weight of around 5kgs. The rearing cost is about 16 Euros, plus 9 Euros for transport. Kid goats are subsequently sold to supermarket chains for 30 Euros each. The profit here is 375,000 euros.

Part of the Pali Group's success relies on transporting the kids along with their veal animals to Italy and Spain, so transport costs are optimised.

In 2007-2008, because of Blue Tongue, Pali could not export live animals. As their contracts guarantee to pick up kid goats, they had to freeze the carcasses and accrued 1,000,000 Euro of frozen kid goat. As their customers prefer fresh, they struggled to sell their frozen stock which was eventually sold over 2-3 year period.

(When I was visited Holland, there were no fattening farms to visit due to Q Fever which meant that there had been no kid goats born.)

Markets and marketing

Speaking from years of experience selling veal and goat, Willem Jorissen pointed out: *"There is no market for kid goat here in Holland. We have tried with veal and consumption is merely 1.3 kg per head per year. To be able to grow the market we need to re-educate and encourage consumers to eat veal and goat, but this is an extremely difficult nut to crack."* One of the approaches employed as part of this re-education has been the use of recipe books; every milk goat farmer has one.

Willem believes that there is a market for niche products, but much depended on price. The cost price of production is key. "If you can make and market them locally, then you can have a better price." His advice was to start with existing markets.

Willem added that the Pali Group does sell goat to the Middle East to feed the army. But this is a very tough and competitive market and much more cut-throat. *"It is much more of a 'push market', than a 'demand market'."* Goat meat is a different product here and it is very low priced, despite being a niche market.



WHAT DID I LEARN?

- The costs of transporting kid goat are cheaper on the continent and economies can be achieved, for instance by sharing transport with other livestock.
- Dutch goat milk producers now consider that milk and meat go together; if you are producing milk you are producing meat. When there are problems with meat; there are problems with milk.
- Look for value along the food/supply chain through skins and offal.
- Go out and find a market for your product, and work in collaboration where necessary
- Kid meat should be promoted as a premium product - as it is so tender and is a sweet meat.
- Get a chef excited about goat meat and get people talking about it.
- Talk about the 'seasons' of a product; there should be a season for kid meat.



CASE STUDY 6

‘The meat market - looking forward’ - Robert Cope, Angelo State University

Spending time with Robert Cope was invaluable. He understood the US marketplace and its customers, and also about goat meat, about carcasses and yields.

His research was covering carcass yield data and dressing percentages, plus yields for various classes of the goat. For instance, Spanish goats were found to be thrifty and performed well (in this heat), whilst the Boer goat normally puts on the most weight in the meat goat test.

He explained that the Spanish, Muslim and Middle Eastern populations have their own preferences for goats and that it was important, as a retailer, to understand the different preferences.

(Of particular interest for Dr Scott was the successful feeding of juniper to goats to help prevent worm burdens. At the laboratory level they have been testing the effect of juniper on the taste of the meat and had concluded that the taste does not come through.)

Pricing

At current prices, it was a seller's and not a buyer's market in the US. The drawback was that live animals could be sold, but it was a struggle to make much margin on packaging the meat. After processing and packaging, the retail cost would have to be \$6-7 per lb, which would make it hard to compete when sold alongside pork, beef and chicken on the counter.

However, if chefs were happy to work with goat meat as something unique, generally price was not an issue. For example, a rack of the loin could sell for \$24 per kg. Also, in Louisiana, they were cubing the product and had no trouble selling it to the ethnic population.

In Brady, Texas - which has the highest population of goats - the eating of goat had even become part of the Labour Day celebrations and was marked by an annual ‘Goat Cook Off’.

Restaurant scene

I researched the restaurant scene and found that New York had taken to kid and goat eating, with some of the top chefs experimenting with and promoting kid. The following quotes, taken from ‘New York Restaurants Trend-let: The New Kid on the Block (an article on the internet from August 2008) gives a flavour of the current interest and trendiness of goat:

“Exhibit A: Cabrito, a hip downtown restaurant actually named after a young goat, specifically the baby kid that is pit-barbecued in Texas, where the goat-eating tradition is as ingrained as the brisket-eating one.

“Chef David Schuttenberg, who last cooked at Fatty Crab, hadn't really cooked goat before, but was intrigued by the idea of it. *“There's something a little bit edgy about it,” he says. “It's a chef's food for sure. It has richness without being super-gamy. It definitely has some funk, and I think that that's kind of the allure for me.”*



"Schuttenberg buys whole kids mostly from boutique barnyard purveyor, Vermont Quality Meats, marinates them for 24 hours, and 'wet-roasts' them with a little water over a bed of onions, garlic, pineapple, and chilies, then serves the meat with a stack of warm tortillas.

"If Schuttenberg is an unlikely ambassador of the Texas cabrito tradition, Heather Carlucci-Rodriguez occupies the same improbable position in the realm of Indian keema paratha.

"As an Italian-American growing up on Arthur Avenue, she'd had goat at family gatherings, but it was only when she fell in love with Indian food and opened the pint-size Lassi in Greenwich Village that she started to cook with it. *"Goat's lean,"* she says. *"It carries flavour very well and can cook forever without losing its integrity."*

"Carlucci-Rodriguez buys her supply from Elly Hushour, who raises both dairy and meat goats on her thirteen-acre Patches of Star Dairy Farm in Pennsylvania and sells them at Union Square Green market. *"Demand has gotten so high, I haven't been able to keep up,"* says Hushour, who has seen goat-meat sales triple in the past five years.

"If a green market presence establishes goat's re-cred, its trendiness potential is reflected by the meat's incursion into the wine-bar world at Blue Ribbon Downing Street Bar, where chef Sefton Stallard transforms it into curried goat sliders served on house-baked challah rolls with red-pepper

"Still, if one man can take credit for the current mini-craze, it's Scott Conant, a chef whose career path is positively littered with the carcasses of baby goats he's cooked at Chianti, City Eatery, L'Impero, even at Carlucci-Rodriguez's wedding, for which he catered. At his current restaurant, Scarpetta, he goes through 12 kids a week."

'Slow food fast'

Can we sell goat meat to white Americans? Robert Cope believes that meat goats could take the place of lamb.

Most white American people will say that they don't like lamb. It has a negative connotation. In the Second World War canned mutton was sent to the American troops who returned with a very poor regard for lamb, which has stuck. The incentive for farmers to keep sheep has also been lost with the falling price of wool.

On that basis, meat goats could take the place of lamb, but that there has to be a different way of presenting it. *"Many customers want to have an instant food that they can eat and don't want to wait,"* Robert says. *"If you can smoke the goat and present it already cooked, then there is a market. There is also a market for 'ready to eat food' in the form of ready meals."*

"Americans are in a hurry on the cooking side and don't care for slow cooking joints. One way to get around this might be to pressure cook the meat in 15-20 minutes. As with other meats, chops and steaks are the easiest to sell, with the legs and shoulders being the hardest, despite having the better flavour."



WHAT DID I LEARN?

- In the right hands, kid lends itself to fine dining, much like venison does. Not only is kid different, but chefs enjoy inventing new dishes with this excellent tender meat.
- To appeal to Western consumers, goat should be turned into ready to eat products like salami, jerky and into ready meals. Adding value to the product to add to its appeal is important.
- Focus on your market place and find the people that prefer this meat.
- Entrepreneurs always think of ways around problems.



Meat goats in Texas - Boer goats (foreground) and Spanish goats (background).



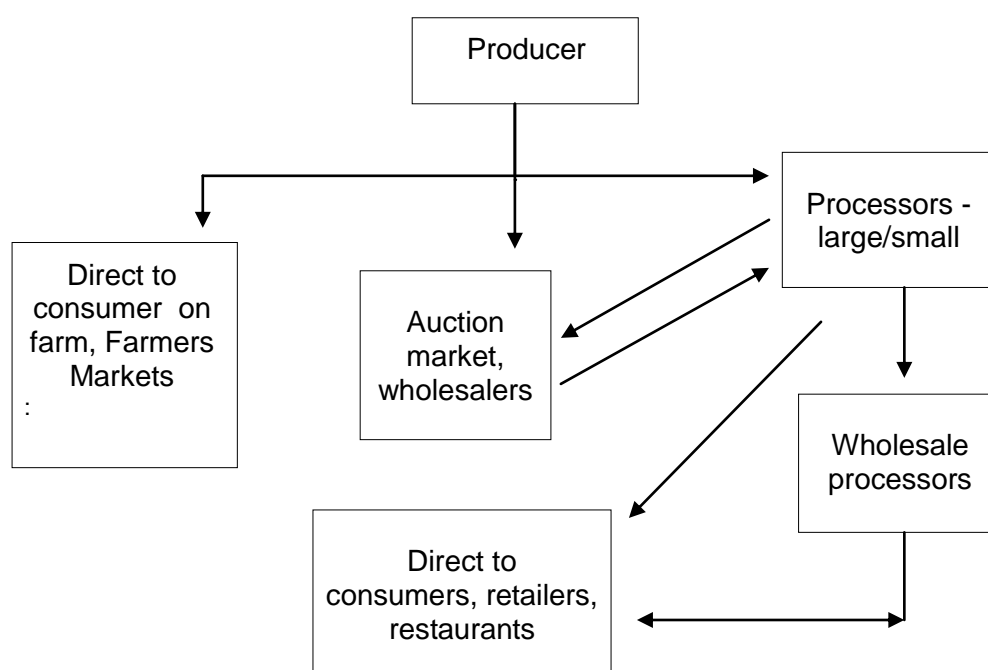
5. ROUTES TO MARKET FOR GOAT MEAT

Main marketing channels

There are three main channels through which products may be sold:

- Direct marketing to the local community - on farm or at Farmers Markets
- Auction markets or wholesalers (or middlemen who sell to wholesalers, who can sell to processors)
- Via processors to retail outlets, such as local supermarkets, grocery stores and restaurants

Figure: Goat meat market structure



[Source: Goat Science and Production]



6. TARGET CUSTOMER GROUPS FOR GOAT MEAT

Who are my customers?

As a business, knowing who are our customers is paramount. When I started my Nuffield experience, I thought that I would learn how to persuade the general British public to eat goat and kid meat and that there was some way of persuading them. As time has gone on, it has become more obvious to me that it is very difficult to persuade people and extremely hard to sell.

As Roger Sutton says: "It's like pushing water uphill! Most people will neither want it, nor entertain it! Why aren't we selling something that people want? "Just look at the iPhone, for example. People queue for one in the Trafford Centre. Clearly, the trick is to have something that everyone wants."

I found this an interesting statement. Why aren't we selling something that people want? And, then it dawned on me. We needed to sell a niche product to the people who do want it.

This was reiterated by Robert Cope, of the Meat Market Angelo State University, who said: *"There is a place for goat to feed people, but first you must find the people that prefer this meat."*

Market demand

In the US, the driving force behind the current increased demand for meat goats is the growing Hispanic population which is expected to swell by 25% of the US population by 2050. Muslims and other faith based populations, such as Buddhists, have also increased by more than 150% over the past few years (Solaiman 2007). This population has created a significant and growing demand for goat meat.

The Muslims population in the United States

According to an academic review of available survey-based data undertaken in 2001 – and based on information provided by Muslim organisations and mosques - the highest reasonable estimate of the number of Muslims in the US is 2.8 million.

A more realistic number - supported by statistically significant survey data comparable to what has been used to calculate the sizes of other religious groups – suggests that there are less than 2 million Muslims in the US, or about 0.5% of the total population. Estimates putting the US Muslim population at 6 million, 8 million, 10 million or more are not supported by empirical data. Such numbers may best be understood as 'spiritual' numbers, rather than actual numbers.

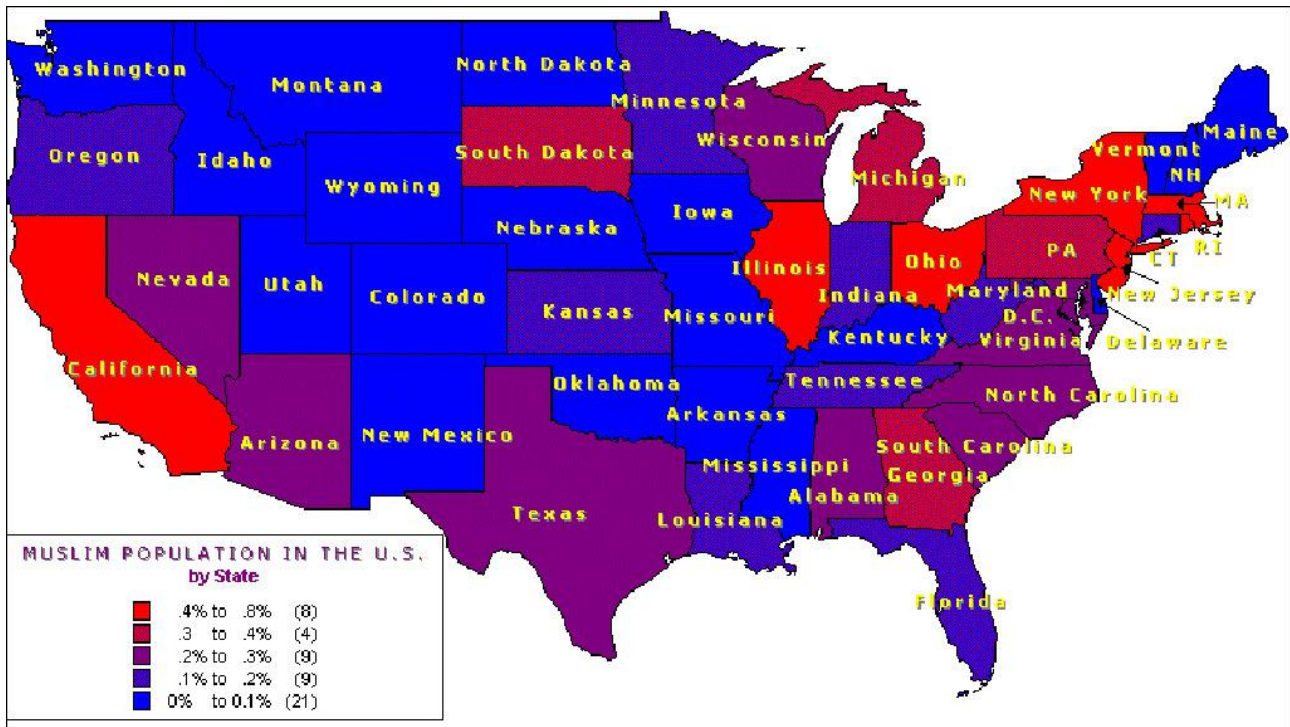
please see map on next page.

Strategies to increase goat meat sales

- (a) **Co-operative marketing:** This idea is to gather several producers into groups and collectively organise sales directly to consumers or processors. This can be used to meet peak demands and to help balance year round sales.
- (b) **Auction markets:** This strategy involves working with an auction house when demands for goat are high – for instance, at the time of ethnic festivals - and to have a goat sale where several producers can market their animals together.



Map showing population of Muslims in USA by State (2001)



- (c) **Direct marketing:** A farm can adapt a breeding schedule so that animals are ready when demand is high. Additionally, we can increase sales by advertising in mosques, local papers, ethnic supermarkets, ethnic restaurants and in urban areas. Producers can develop mailing lists for all of these targets.
- (d) **Contracting:** Work alongside other farmers to meet market objectives to maintain consistent supply. Perhaps a processing cutting room would increase income from your enterprise, where carcasses sourced from your partners could be cut too.
- (e) **Value added:** If you can add value to your products - like cooking at food shows and catering with your product - you could gain greatest overall profit margin. Costs will be incurred for extra equipment and complexity, which will undoubtedly discourage some producers, but there is money to be had. It always pays to remember: *"Agricultural producers farming commodities receive far less of the end dollar than the processors."* [Gipson 1996].
- (f) **Internet marketing:** This area represents a great opportunity to increase sales of niche products, as sales locally may not amount to much, but sales nationally could be far greater.



7. SUPPLY AND DEMAND

When growing a market place there can be a real issue with supply and demand. If you are offering a new meat like goat there is a real danger of insufficient supply once demand takes off. To reduce the risk, it may be necessary to work in partnerships with other farmers to rear goats and to create supply chains.

As with any meat animal, one of the issues with goat meat is the length of time it takes to grow and the lag period before money is paid - which is not the case with plant products such as organic blueberries. I was interested to meet Scott Lawson, of Lawson Organics 'True Earth', from Hawkes Bay New, Zealand who can plant in accordance with what he wants to sell.

Scott farms 250 hectares and turns over \$2.5 million a year. What I liked about True Earth was the planning involved in looking at what he was producing for the market place. *"Is there a need for that product and what do I need to grow for my marketing schedule? I work backwards. We have a plan and stick to that plan - and go,"* says Scott.

Focusing on meat, venison provides perhaps one of the best examples of a product that, although niche, has a wider appeal and has gained market share. This meat has certainly made it to the restaurant table and has been exported around the globe.

The gassing of billy kids

In the UK there is demand for kid and goat. We have a population of 60 million Britons of which 9 million are of ethnic origin and mostly eating mutton, partly because there is just not enough goat available. Also there is a crying waste on British farms: every spring around 40,000 billy kids are being born and destroyed at birth because there is no market for them (or because they are perceived as being not worth rearing!)

I would like to see this turned around, and these kids are raised for meat (as they are in Holland), to feed our ethnic population.

What needs to happen?

This project needs to have the support of the goat milk processors like Delamere Dairies, St Helen's and Waitrose. We need these processors to make it mandatory as part of the producers' milk contracts that billy kids are reared, thus demonstrating a corporate and social responsibility to their customers.

Goat kids need to be kept for 1-3 days on colostrum and then raised on fattening farms for 6-10 weeks to be capretto, or to be taken on to 8 months to be large enough to slaughter as kid.

Kid then needs the support of chefs to promote a "season of the kid" for consumption in restaurants. The farmers also need to be paid a fair price for raising the animals. Kid as a delicacy could be sold for as much as £10 per kg when finished. Capretto is worth £50 for a 5kg carcase, which to me seems worth raising for. This has worked as a project in Holland and I would like to see it working here. This market could be worth 40,000 kids at a £50 finished price: a £2,000,000 turnover.

I am in talks with a celebrity chef over this hot topic and I would like to see some changes for the better here - for the farmers, the kid goats, the general public and for the blatant waste.



8. THE BASICS OF MARKETING AND PRODUCT AWARENESS

There are a host of marketing tools available for reaching out to customers:

(a) Signage

On farm it may be as simple as a road side sign, or banner, stating what you sell and when. When we first started selling goat meat, we simply put an 'A'-board outside the farm advertising our meat and customers stopped.

(b) Word of mouth

For many, word of mouth is the best advertising of all! The other big advantage is that it is free. I think when you have a unique product that is good in quality, it will sell well this way. Bob Kirk, from Spring Steps, UK, found that word of mouth is the best way of all to sell his goat produce.

(c) Farmers' markets

Getting a place on a farmers' market can boost customer awareness of your product locally and help increase sales. Also, leaflets and recipe cards advertising your products and its pricing helps to market your produce to others.

(d) Food shows

Attending food shows allows you to reach larger audiences of foodies wanting to try good quality produce. There are mixed shows to attend, either locally or further afield. The larger shows, such as the BBC Good Food Show, allow bursaries for small producers and this can be beneficial.

For some, attending food shows reaps financial rewards (although this may diminish after large attendance fees and incremental costs are taken into account). For others, it is more about PR.

At food shows there is an opportunity to give out promotional material and note down customers' e-mail addresses to add them to a data base for future marketing purposes. Also, wholesale buyers attend these shows and it is an opportunity to meet them.

Talking to Liz Sutton at Delamere Dairies, she described key European shows to visit in order to meet trade buyers e.g. IFE every other March, Sial in France every year, and Anuga trade shows every other year in Germany. Another example was Henk De Lang, who went to the Biofach Show in Germany to meet organic pork buyers.

(e) Website

Investing in a good website is essential to a niche business. Building and maintaining a good website that is clear to look at and where products can be purchased easily by the public is key. This allows for ease of purchase day or night, and gives customers the opportunity to learn more about your products and business. There are providers such as Paypal, Nochex and Secure Trading that can collect your payments on line and transfer to your bank account.

A niche business may be more than a local business. In many cases, such as ours, it is a national business, or for some it can be international. But it may be that you want a website to



merely introduce your business and direct customers to buy via your shop, or to tell them more about your product and where they can buy it from.

(f) Incentives

If you are a business 'off the beaten track' use incentives for customers to visit you. Incentives can be as simple as a competitive price, or offering something unique.

Spring Steps Dairy in the UK offers both. You can't possibly get their on-site experience in the supermarket! What I found interesting here was that the general public were coming out for a cream tea and were eating goat products as if they were normal dairy products. They were visiting for the fresh taste and dining experience, not necessarily for the health reasons.

Bob Kirk has had to create his own route to market. He has had to produce, process and direct sell his milk as no one will pick it up. I was impressed with his ability and energy. Like Spring Steps, he also has a popular tea room attracting over 200 plus visitors per weekend in the summer season. With a decor straight out of "Country Living" magazine, he sells delicious cream teas and lunches, goat cheese platters, home-made scones with goat cream and jam, and even carrot cake made with goat butter and cream.

Sally Kirk says: "People have to come out to us and we have to be good value. There is a balance point; it has to be great food, but not too expensive. Bob says customers think if it is too dear they can get it somewhere else more cheaply.

(g) TV and radio

One thing that happens when you are marketing a niche is that you have to be prepared to shout above the parapet about it! With this comes TV and radio interviews. These are opportunities not to be missed, as TV researchers knocking on your door provides free advertising

Alternative Meats based in Shropshire really know their way around PR and thrive on it. Jeanette Edgar, who is the Sales Director behind the company, is passionate about what she does and sells. This huge enthusiasm comes over when she speaks.

She believes there are multiple ways of selling: through the internet, e-mail, free PR through press releases, magazines and newspapers.

Alternative Meats have a feature in an FHM magazine article on meat in 2011. Jeanette Edgar and Rachel Goodwin have been on Ready Steady Cook and on a BBC Radio 4 feature on unusual meat, with Jenny Eclair on Woman's Hour, which led to the publication of their own recipe book, Alternative Meats (now sold in Waterstones).

(h) Sales calls

Sales calls can perhaps be the most daunting of all aspects of reaching new customers. Again, Alternative Meats used this tool to gather a database of customers, such as hotels and restaurants, for their meat.

They searched through magazines and researched the internet looking for new customers to call. They aim to ring up 10 new customers per day and have sales targets to reach. How many of us do this? This is perhaps the most difficult of the sales jobs.



(i) Mail shots and monthly newsletters

Mail shots and newsletters can be another way of targeting potential buyers, along with sending out fliers and a letter introducing your business. Monthly newsletters provide a way of keeping in touch in a non-obtrusive way to customers signed up to the website. It keeps them up to date with news of the farm, as well as with news about products and special offers.



9. OBSERVATIONS AND RECOMMENDATIONS

1. **Niche** A niche business can set you apart and give you a unique market in which to operate. Your sales volumes are lower, but there are generally fewer competitors and you can command higher margins.
2. **Know your market place:** Know and research your marketplace. Do you have customers who want to buy this product? Who are your customers? Can you reach these customers? Can you sell where you are?
3. **Sell something that people want:** Make sure that you are selling something that people WANT to buy before you leap into selling a product! Look for product gaps in the market. It might be a case of being in the market place at the right time.
4. **Appropriate price:** When you start to sell a niche product, make sure that you go in with a price that is high enough - as eventually the price will be worn down. Is there sufficient margin for wholesalers; they will add 30-40% margin on top of cost of your product. Consider having different quality products to be able to offer lower- and higher-end sales.
5. **Product availability:** Can you grow/produce or otherwise source enough product to meet demand? Are there debilitating factors? What happens if greater demand suddenly increases; can you significantly increase output?
6. **Creating product demand:** Have you got the skills set to market and sell your product? Can this skill set be brought in? Have you got the infrastructure and tools in place to shout about your product - internet, media contacts, literature, signage, enter competitions/gain award recognition, food channels and cookery show exposure, celebrity chef endorsement, etc? If you can find a celebrity chef to shout about your new product, then this is a way forward. Some products may also grow through food service and having it featured on a menu.
7. **Gassing of kid goats:** I would like to see changes on farm and in the marketing of kid meat, so that we work in co-operation with goat milk buyers, goat farms, fattening units, chefs and supermarkets to initiate the production of kid meat rather than the gassing of billy kids in Britain.
8. **Product distribution:** How will you get your product to the customer? Will you 'sell on' or sell yourself, or both? What are the costs?
9. **Choose strategic partners:** If it is difficult to grow a market by yourself, look for strategic partners who reflect your business and where you are going. This applies to retail outlets to help sell your produce, as well as strategic partners who can grow produce for you.
10. **Business adaptability:** Be prepared to change and alter what you do; whether this is adding further product lines or ceasing to sell what does not work. (Entrepreneurs always think around problems.)
11. **Ethnic opportunities:** The ethnic population is growing and there are many opportunities to fill this demand gap. Producing for ethnic holidays is key and producers need to know about the ethnic calendar and events - such as Eid and Ramadam - to improve returns when demand is high.



10. WHAT NEXT AT CHESTNUT MEATS?

After eight weeks of travel and time spent away from the business and family, you get time to think and reflect. My 'Nuffield moment' had to be the realisation that the focus for our sales had to be on **the people who 'want to buy goat'**.

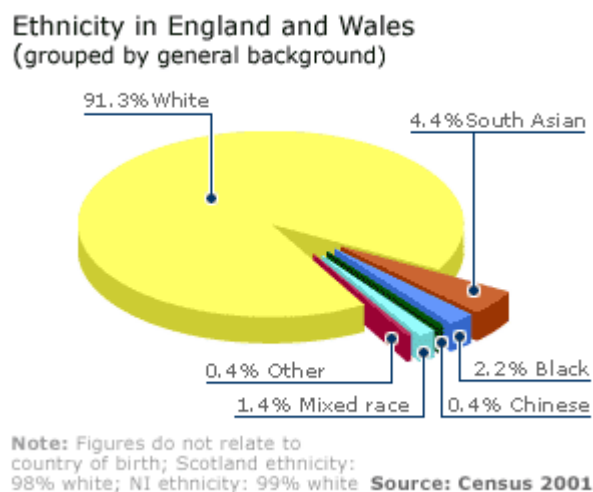
Robert Cope, from Angelo State University, said to me: *"There is a place for goat to feed people. But first you must find the people who prefer this meat."* He had just attended the "Reciprocal Meats Conference" in Kansas and was hopeful that agriculture would turn the corner and offer a tremendous future.

"Of late we have seen a lot of small producers disappearing, but we are now starting to see a lot more people appearing in niche markets and these markets are gaining market share". This gives me confidence to believe in what we at Chestnut Meats are doing as niche producers and retailers.

So the target for us at Chestnut Meats has to be the ethnic population and giving our customers the product they want when they want!

Market potential

The ethnic population breakdown of the 54 million Britons is shown below and reveals huge potential for our product.



The non-white British population has grown from 6.6 million in 2001 to 9.1m in 2009 - or nearly one in six. The white British population has stayed the same since 2001 because, even though there has been an increase in births, there has also been a similar number of people migrating.

The mixed-race population has neared a million for the first time - from 672,000 in 2001 to 986,600 in 2009, an increase of nearly 50%. A third are mixed Afro-Caribbean and white, followed by Asian/white.

The ONS statistician said this is not a result of increasing birth rates, but more that we are becoming less divided; the population is 'mixing up more'. The highest proportion of mixed race is in Haringey, London, where 4.4% are mixed.



Ethnic customers

High on the list of our business priorities is to target the ethnic population and visit ethnic conurbations and mosques to advertise and market our meat, whilst also targeting Halal butchers and restaurants.

With this in mind, I visited Brixton Halal meat butchers and Notting Hill Carnival in the summer of 2012 to see some potential customers. My first experience was unexpected.

When I visited the shops, there was lean meat for sale on the counters labelled as goat and carcasses hanging up that I was told were goat, but later found out were not goat but mutton. I was also told by a company supplying the shops that it was Halal Mutton, not goat.

I had gone into these shops to introduce ourselves and to sell, but they were buying in "goat" for £2.50 per kg and retailing it for £4.99- £5.99 per kg when in fact it was mutton. I'm sure there is an opportunity here to sell authentic goat at the right price.

At Notting Hill curry meals were being sold as a takeaway food, alongside jerk chicken, at £7.50 per portion with rice and peas (although I wondered how real the goat was?). At these prices, I felt there could be an opening for us to sell our own curry goat meal - an opportunity for the future.

New avenues

One realisation is that we may never achieve a huge volume of sales, but that we could keep ahead in our sector by growing our sales through new avenues, particularly through food service and restaurants, and also new types of stock and a broader product offer.

Pedigree stock: The rising price of lamb and mutton has helped lift the price of live goats and breeding stock. As a result there are new market opportunities for pure bred Boer meat goats as pedigree stock which we are investing in. Through a visit to Holland we have purchased two new Boer billies with genetics from Texas and will be changing our herd and breeding for the traits we want for our environment.

Wider offer: Offering one base product line of kid and goat is, we feel, excluding us from sales locally and we are keen to develop our packing space for internet parcels, increase our butchery area, and extend our office in the barn outside the house. With this in mind, we are already broadening our offer and putting in an over-counter fridge in the barn to sell more meat locally. We are also taking on another full-time member of staff so that I am free to develop more sales.

Improved website: Keeping ahead with the technology and keeping our website fresh is key to our sales and we are currently developing a new website through partial funding.

Strategic partnership: Recognising that we cannot grow a niche in isolation, we are looking to take on a strategic partner with the chance that we can work towards rearing some of the billies that are currently gassed. In Holland, these kid goats are reared as a premium product.

Goat ready meals: After considering the market and lessons learned from Robert Cope, we need to give the British public something that is easy to cook, so the ready meal has to be a way forward.

Increasing sales volumes: For goat to go "viral", we need to find others to endorse and sell our products in order to significantly raise volumes. With this in mind, I may have found a celebrity chef - who is passionate about British food and has already been involved with Prince Charles in the



Mutton Revival Campaign - to endorse kid meat.

Health branding: I was impressed with the New Zealand Heart Foundation's tick programme for Healthy Heart Foods and thought this could be adopted here in the UK in some way to help consumer choice.

'A Nuffield Bonus'

I saw an ideal feeding trough for our goats whilst travelling. The trough's design prevents animals from treading in their food and spoiling it or getting their heads stuck. The troughs were light weight and were also fitted two inches higher than the goats' back ends to stop the stock defecating in them and spreading disease.

We have already made a prototype and have been testing it back on the farm to help save on feed and help the goats' health.

I also had the privilege of spending time with Professor Frank Craddock and learning a great deal about parasites, predators and fences and goat husbandry in general – for which I am grateful. The topic was not part of my study research, but the information is valuable and can be used in other talks I give.

Marnie Dobson

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APPENDIX 1

Business /farm contacts and support given

UK

Linda Mercer
 Bob Kirk
 Jeanette Edgar and Rachel Godwin
 Roger Sutton
 Paul Fox
 Lyndon Edwards
 Stephen Throup
 Walter Murray
 Smithfield Meat Market
 British Heart Foundation
 Innocent Smoothies
 David Doctorow
 Tiff and Judith Hall
 Julie Mate

Billy Goats Stuff
 Spring Steps Dairy
 Alternative Meats
 Delamere Dairy
 Nuffield UK
 Nuffield UK
 Nuffield UK
 Kezie Ltd
 London

 Wholefoods, Kensington
 British Boer Goat Society
 Nuffield UK

Netherlands

Henk de Lange
 Simone Janser
 Alfons Beldman
 Harry Kill
 Willem Jorissen
 Lindeboom
 Buitenhuis
 Haverkort Organic Butchers
 Farm shop Ommen
 Organic Farmers Market
 Engel and Ninenke Kupers
 Slaughterhouse
 Ward Watzeels
 Lenina and Corne Polak

Vechtdal Producten - organic pigs/cows/entrepreneur
 Koe Safari- agri-tourism/producer beef business
 LEI Wageningenur
 Ozgazi - soft cheese manufacturer
 Pali Group - veal and goat exporters
 Venison Farm
 Rouveen Goat Farm
 Zwolle
 Vechtal producten
 Groningen
 Boer Goat Society, Nieuwe Pekela - Boer goat breeder
 Belgium Border- Halal slaughter
 Bettinehoeve - goat milk processor
 Lage Zwaluwe – goat farm

New Zealand

Alan Mitchell
 Beef and Lamb New Zealand
 Blair Matheson
 Scott Lawson
 Gerard Hickey
 Jason Ross
 Sally Heaslop
 Simon Wiesnoski
 Anna and Paddy Trolove

GoatsNZ - goat exporter
 Lake Taupo water meeting
 The Honey Hive, Huka Falls
 Lawson's organic farms – fruit and vegetable grower
 First Light Foods - Marketeer
 First Light Foods - Marketeer
 Woodburn Venison - producer/retailer
 Venison Packers – Venison slaughter house
 Vines and lambs, Kekerengu



Jean Charles Van hove
Chris Redwood
Diana Hawkins/Suzanne Bailey
Steven and Josie Sterne
Alistair Polson
Peter Verkerk
Judith Mair
Steve Klyma

Wine grower, Seddon
Omega Mussells, Blenheim
Karikaaf Cheeses
Patoa Farms, Hawarden
Nuffield New Zealand
Hellers, near Christchurch
Hellers, near Christchurch
Deer velveting, Hawarden

Texas, USA

Dr Frank Craddock

Dr Danny Kleinfelter

Hope Pjesky
Robert Cope, MS

Jason Jacoby
Dr Mike Salisbury

Mr Fred Homeyer
Chico Denis
San Angelo Feed Yard
Loyd Whitehead
Eddie Sawyer
Preston Faris

Norman Kohls
Glyn Hutto
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Jacoby's Melvin, Texas
San Angelo's Texas A& M University
Agricultural Research and Extension Centre (for goat
meat performance test)
Antelope Creek Ranch, Robert Lee
Lamb and goat feedlot, Vancourt
Beef feedlot
Rocking Chair Ranch
Sawyer Ranch, Sonora
Retired Extension Agent, Sonora,
and meat goat farmer
N&K Ranches, Eldorado
Wether goats producer, and goat buyer
Eldorado
Holman Ranch, Sonora Experiment Station
Cotton Gin, Mereta
Rancher and goat dealer
Retired County Extension Agent



APPENDIX 2 - Further reading

Marketing judo: Building business using brains not budget by John Barnes and Richard Richardson

De Geit (Goat cheese and meat recipe book) by Door Sjeef Brok

Meat goats by Sara Emond, Alberta Agriculture and Food

Making niche marketing work by Robert E Linneman and John L Stanton Jr

Raising meat goats for profit by Gail Bowman

The farming of New Zealand by Ian Baker, Gordon McLauchlan. Chapter 7 on Deer and goats.

Kiwis fruits farming pp 242-244.

Marketing by Dr John Morris (Nov 2006)

A lasting legacy - A 125 year history of New Zealand farming since the first frozen meat shipment, Ed. Colin Williscroft PMP, NZ Rural Press Limited, Auckland, 2007

Sheep and goat medicine, Chapter 2 pg 19 by D G Pugh

Goat medicine, Mary C Smith, pg 568, Management practices

Meat goat production handbook, Langston University

Goat science and production, Chapter 18 ,Business Plan, Production enterprise, and marketing strategy

Make money with mutton sheep, Dr Q Campbell

New York restaurants trendlet: The new kid on the block, an article on the internet from August 2008



APPENDIX 3 - Explanation of terms

Description of Boer goat from Wikipedia:

"The Boer goat was developed in South Africa in the early 1900s for meat production. The name is derived from the Dutch word "Boer" meaning farmer. The Boer goat was probably bred from the indigenous goats of the Namaqua Bushmen and the Fooku tribes, with some crossing of Indian and European bloodlines being possible. Goats were selected for meat rather than milk production; due to selective breeding and improvement, the Boer goat has a fast growth rate and excellent carcass qualities, making it one of the most popular breeds of meat goat in the world. Boer goats have a high resistance to disease and adapt well to hot, dry semi-deserts. United States production is centered in west-central Texas, particularly in and around San Angelo. The original US breeding stock came from herds located in New Zealand. Only later were they imported directly from South Africa.

Boer goats commonly have white bodies and distinctive brown heads. Like the Nubian goat, they possess long, pendulous ears. They are noted for being docile, fast growing, and having high fertility rates. Does are reported to have superior mothering skills as compared to other goats. Mature Boer bucks weigh between 110–135 kg (240-300 lb), and mature does between 90–100 kg (200-220 lb)."

Religion, by Age
July to September 2008
Great Britain, not seasonally adjusted

	0-4	5-9	10-15	16-19	20-24	25-29	30-34	35-39	40-44	45-49	50-54	55-59	60-64	65-69	70+	Total
Christian	2,069	2,100	2,937	2,085	2,398	2,308	2,238	2,814	3,324	3,240	2,894	2,876	3,025	2,346	6,001	42,657
Buddhist	10	8	6	9	17	18	22	22	27	21	14	18	10	6	6	214
Hindu	45	41	45	31	67	85	93	53	43	58	43	26	24	22	31	707
Jewish	17	12	15	12	14	21	14	24	14	18	18	26	16	16	48	285
Muslim	301	236	253	152	245	257	236	204	146	111	95	61	35	33	56	2,422
Sikh	34	21	28	22	34	45	39	30	21	21	26	23	12	12	21	389
Any other religion	16	16	31	18	34	34	43	45	39	36	38	34	30	22	50	486
No religion at all	1,082	844	933	729	1,197	1,176	994	1,075	940	714	562	450	380	217	363	11,656
Did not answer (N/A)	6	3	5	3	10	8	8	4	5	2	3	0	4	2	3	66
Total	3,580	3,281	4,252	3,062	4,016	3,953	3,687	4,271	4,559	4,220	3,693	3,515	3,536	2,677	6,578	58,880

Source: Labour Force Survey

It should be noted that the above estimate excludes people in most types of communal establishment (e.g. hotels, boarding houses, hostels, mobile home sites etc.)

As with any sample survey, estimates from the LFS are subject to a margin of uncertainty.

Extract from Sunday Times (30 January 2009)

The Muslim population in Britain has grown by more than 500,000 to 2.4 million in just four years, according to official research collated for *The Times*.

The population multiplied 10 times faster than the rest of society, the research by the Office for National Statistics reveals. In the same period, the number of Christians in the country fell by more than 2 million.

Experts said that the increase was attributable to immigration, a higher birthrate and conversions to Islam during the period of 2004-2008 (when the data was gathered). They said that it also suggested a growing willingness among believers to describe themselves as Muslims because the western reaction to war and terrorism had strengthened the former's sense of identity.