

**“UNDERSTANDING THE  
ETHNIC MARKET  
OPPORTUNITIES FOR  
ONTARIO GOAT”**

**Ethnic Meat  
Market Study  
Report**



# OUTLINE

- **Composition of the market**
  - The current ethnic market
  - The future of the ethnic market
- **The Demand for goat meat**
  - Consumption trends
  - Purchasing decisions
    - Price, freshness, quality and trust
- **Opportunities and Challenges**
  - Year-round demand
  - Growing ethnic population
  - Exposure in ethnic restaurants
- **Ontario Goat's next steps**
  - Where do we go from here?

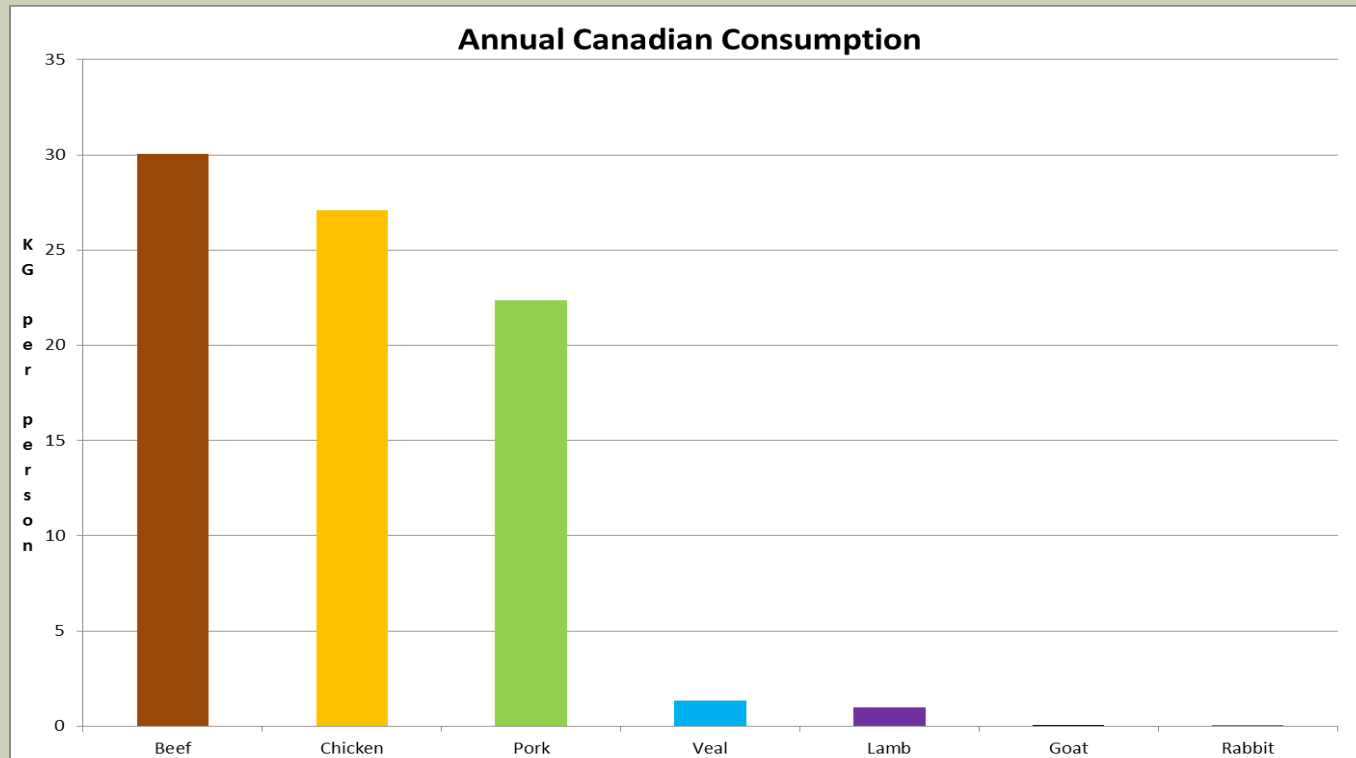
# COMPOSITION OF THE MARKET

THE CURRENT AND FUTURE STATE OF THE ETHNIC  
MARKET IN THE GTA

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# CANADIAN GOAT MEAT CONSUMPTION

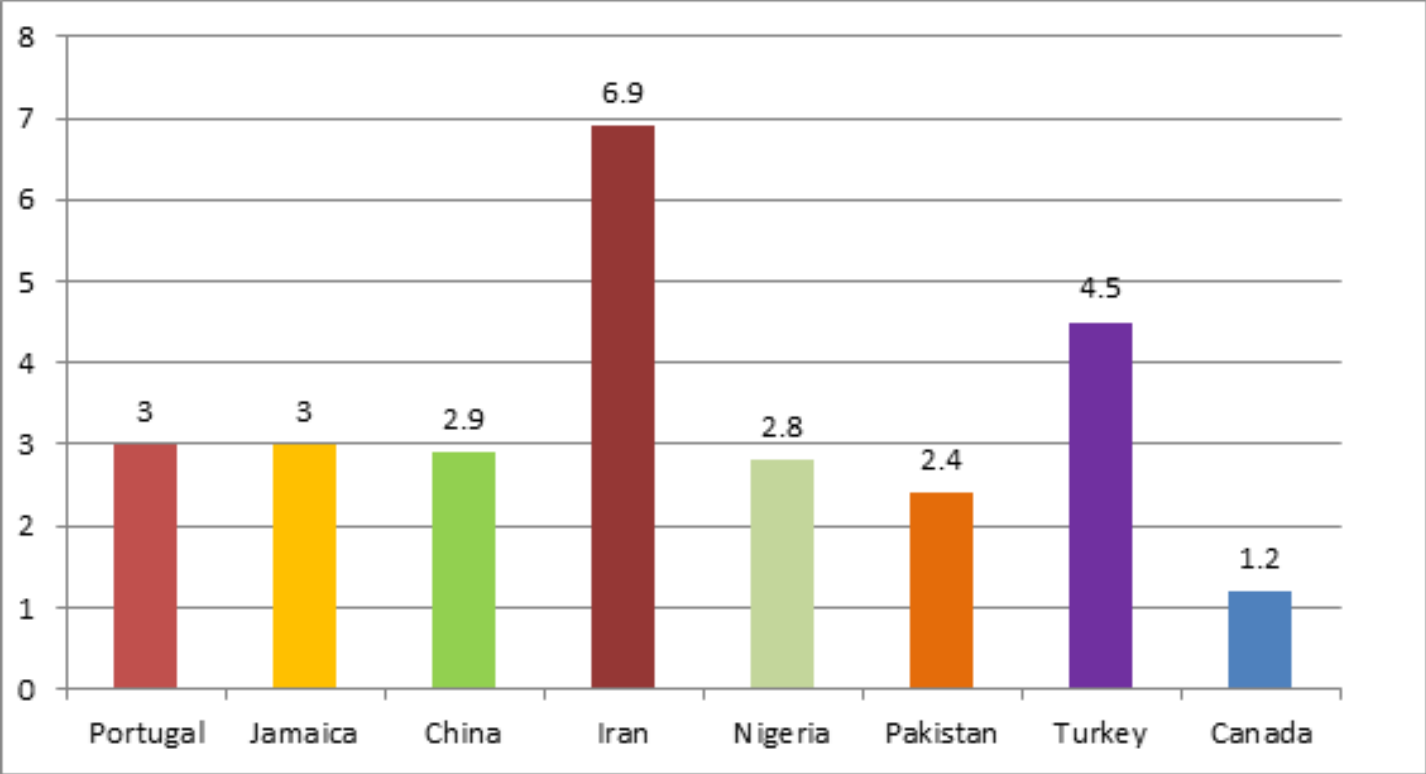
**FIGURE 1.** Annual consumption by Canadians of beef, chicken and pork versus ethnic meats



Source: Statistics Canada - Tables 002-0010 and 051-0001, Calculations done by AAFC-AID, Market Information Section

# GLOBAL GOAT MEAT CONSUMPTION

**FIGURE 2.** Goat and mutton consumption in selected countries compared to Canada (kg/capita/year)

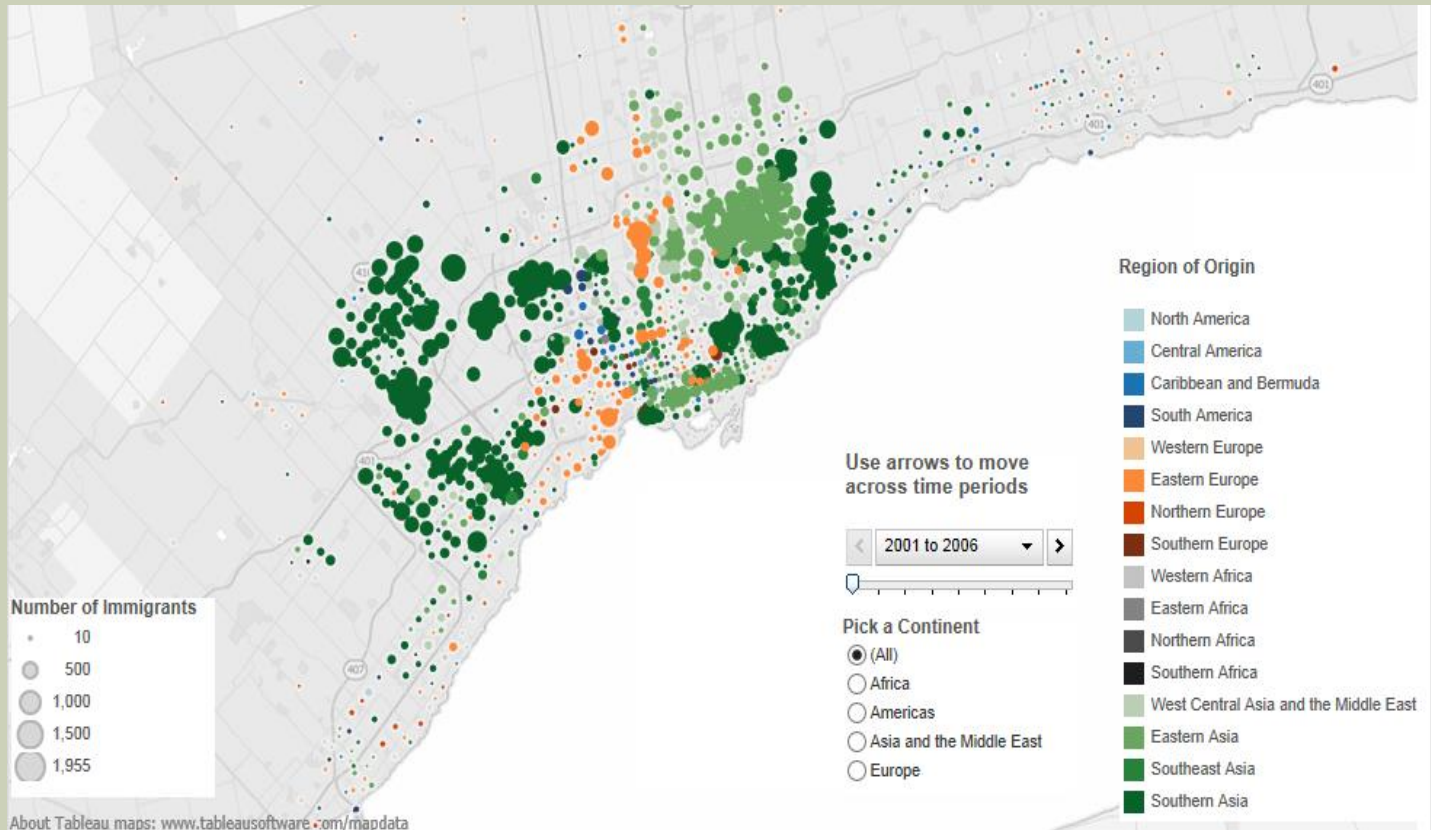


Source: "Kings of the Carnivores," [www.economist.com](http://www.economist.com) , Apr. 30, 2012 (courtesy FAO).



# THE CURRENT ETHNIC MARKET

MAP 1. Where new immigrants have settled in GTA



# THE FUTURE OF THE ETHNIC MARKET

- Predict that 63% of the GTA's population will be “visible minorities” by 2031
  - A 43% increase from 2006
- The largest ethnic groups known as “Ethnic Big 3” – Chinese, South Asian and Filipino are projected to make up 7.3 million of Canada's total population in 2031
  - Up from 3.5 million today

# THE FUTURE OF THE ETHNIC MARKET

**TABLE 1. Projected ethnic population growth of GTA from 2011 to 2031**

Ethnicity	Year				
	2011	2016	2021	2026	2031
Caribbean and Bermuda	184,125	205,299	228,909	255,233	284,585
Eastern Asia	651,055	787,777	953,210	1,153,384	1,395,594
Eastern Europe	198,875	199,671	200,469	201,271	202,076
Middle Eastern	182,860	230,404	290,309	365,789	460,894
North America	76,945	77,253	77,562	77,872	78,184
Northern Africa	27,635	34,820	43,873	55,280	69,653
Northern Europe	127,740	128,251	128,764	129,279	129,796
South America	139,440	160,356	184,409	212,071	243,881
Western Europe	50,860	51,063	51,268	51,473	51,679
Oceania	7,040	7,068	7,096	7,125	7,153
Southeast Asia	498,295	553,107	613,949	681,484	756,447
Southern Europe	283,120	284,252	285,389	286,531	287,677
Africa	108,620	121,111	135,039	150,569	167,884
Non Ethnic Canadians	3,422,390	3,436,080	3,449,824	3,463,623	3,477,478
<b>Total</b>	<b>5,959,000</b>	<b>6,276,512</b>	<b>6,650,070</b>	<b>7,090,983</b>	<b>7,612,981</b>

Source:  
<http://www.statcan.gc.ca/pub/91-551-x/91-551x2010001-eng.pdf>

\* Projected ethnic population in the GTA ~4.2 million by 2031





# SURVEYED GROUPS

- 1. African** (represented, in part, by new Canadians from Eritrea, Algeria, Morocco, Nigeria, Somalia, Ethiopia, and Cameroon).
- 2. Middle Eastern** (included new Canadians from Iran, Syria, Egypt, Turkey, Armenia, and Afghanistan).
- 3. South Asian** (this community encompasses Bangladeshi, Bengali, East Indian, Guan, Gujarati, Ismailia, Kashmiri, Nepali, Pakistani, Punjabi, Sinhalese, and Sri Lankan immigrants)
- 4. South East Asian** (Chinese, Japanese, Korean, Vietnamese, Cambodian, Malaysian, and Pilipino)
- 5. Caribbean** (included new Canadians from Jamaica, Trinidad and Tobago, Barbados, Grenada, St. Vincent, Cuba, Saint Lucia, Dominican Republic and Haiti), and
- 6. European** (Scottish, English, Irish, Welsh, Russian, Ukrainian, French, Italian, Portuguese, German, Greek, Polish, Swiss etc.).

# SURVEYED GROUPS

Each of the ethnic groups were surveyed based on the following:

- **Household demographics**
  - Income, employment status, number in household, education level, marital status, halal preference
- **Frequency of consumption**
  - At home, restaurant, at family and friends
- **Important factors in meat purchases and consumption**
  - Price, trust, quality & freshness, etc.

# THE DEMAND FOR GOAT MEAT

CONSUMPTION TRENDS AND  
PURCHASING DECISIONS

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# THE DEMAND FOR GOAT MEAT

## CONSUMPTION TRENDS

### Consumption Trends

- Consumption frequency
  - Year-round versus holidays and special occasions
    - At home
    - At a restaurant
    - With family and friends
- Consumption quantity
  - Current and future demand
  - Canada/Ontario's supply versus demand for goat meat

# THE DEMAND FOR GOAT MEAT

## CONSUMPTION TRENDS

- Ethnic groups would like to eat substantially more goat meat
  - Already consume 6 to 10 times the amount of goat and mutton consumed by average Canadians

**TABLE 2.** Yearly goat consumption (kg/person) by surveyed ethnic group

Origin	Goat kg/Person
African	9.3
Caribbean	7.7
European	5.8
Middle Eastern	10.3
South East Asian	5.4
South Asian	8.7
Canadian	0.07

# THE DEMAND FOR GOAT MEAT

## CONSUMPTION TRENDS

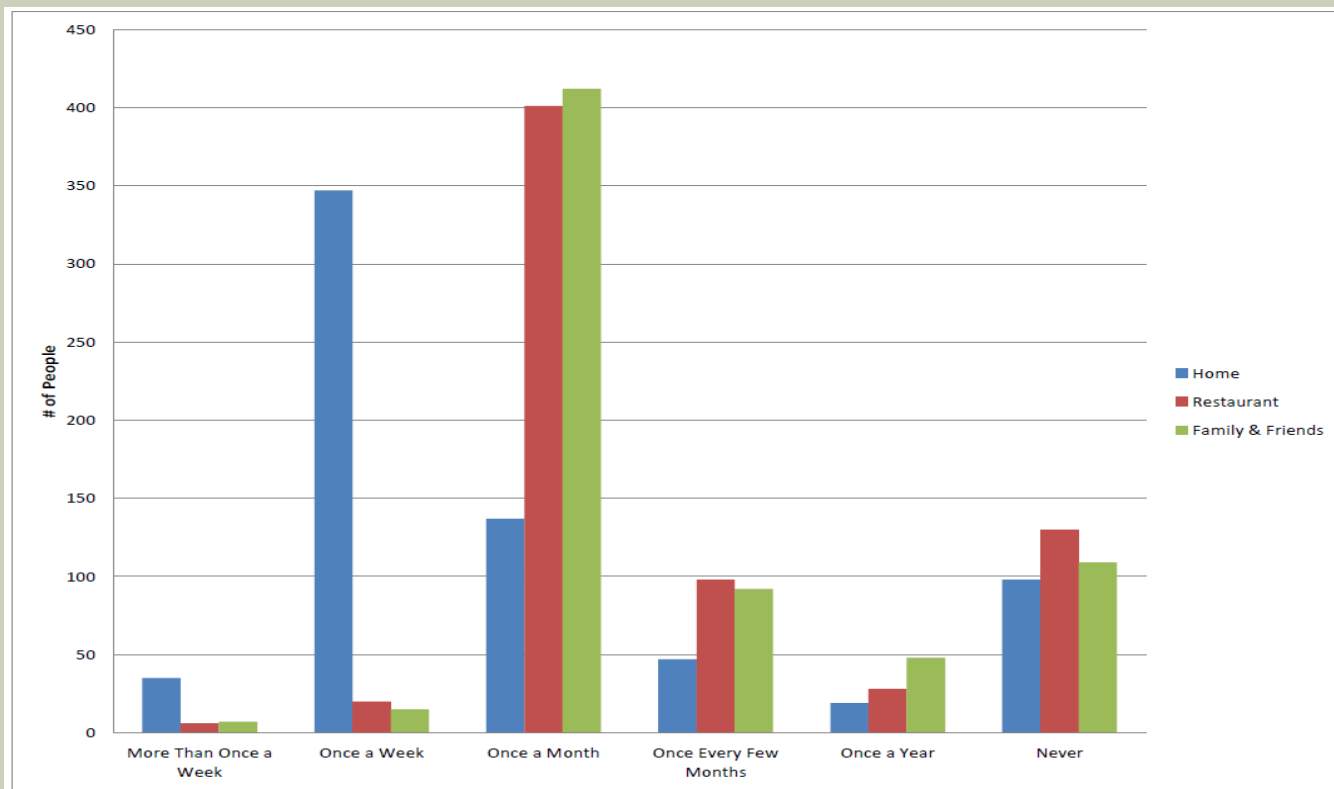
**TABLE 3.** Percentage of ethnic meat (goat, veal, lamb & rabbit) consumed on holidays and occasions

Ethnic Group	Beginning of Ramadan	Christmas	Eid-al-Fitr	Birthdays	Eid-al-Adha	Weddings	Passover	Anniversaries	Easter	No, never on special occasions
African	15	4	20	13	82	48	2	20	2	3
Caribbean	5	12	3	24	9	74	2	45	8	11
European	1	17	0	27	2	55	6	30	13	28
Middle Eastern	25	5	37	16	83	54	3	23	3	9
South Asian	14	3	24	20	56	35	4	17	3	26
South East Asian	1	6	1	12	6	43	5	16	2	42

# THE DEMAND FOR GOAT MEAT

## CONSUMPTION TRENDS

**FIGURE 3.** Goat consumption frequency by surveyed groups (combined)



# THE DEMAND FOR GOAT MEAT

## CONSUMPTION TRENDS

- Goat was not as readily available as veal or lamb
  - Would expect greater consumption if made more available in supermarkets

Considering...

- Total domestic production of goat meat = 920,955 kg
- Total imported goat meat = 1,328,145 kg

2,249,100 kg per year / 33,000,000 people in Canada  
= 0.068 kg per Canadian



# THE DEMAND FOR GOAT MEAT

## CONSUMPTION TRENDS

### *Example: Middle Eastern Group*

Origin	Goat kg/Person
Middle Eastern	10.3

- Middle Eastern population in 2011 in GTA = 182,860
  - Total consumption of goat meat is 1,883,458 kg/year

→ ~ 900,000 kg/year (adjusting for children as smaller meat eaters)

# THE DEMAND FOR GOAT MEAT

## CONSUMPTION TRENDS

### Consumption Trends - Summary

- The second most consumed meat by surveyed groups was goat
  - Middle Eastern and Africans would eat goat almost as frequently as veal
  - South Asians would consume more frequently than veal
- Ethnic groups would like to eat substantially more goat meat
  - Goat can truly compete with mainstream meats in ethnic markets
- Goat was not as present as veal or lamb
  - Would expect greater consumption if made more available in supermarkets

# THE DEMAND FOR GOAT MEAT

## PURCHASING DECISIONS

### Purchasing Decisions

- Leading factors amongst ethnic groups when making goat meat purchases
  - Price
  - Quality and Freshness
  - Trust

# THE DEMAND FOR GOAT MEAT

## PURCHASING DECISIONS

### Price

- Goat is generally seen as a “high ticket” item

However...

- Lower Income households not generally related to less consumption
  1. Ethnic households have a higher proportion of wage earners than other groups
  2. Accustomed to paying more of their discretionary income for food
  3. Regularly featured as holiday fare, and cost is less of a concern

- Goat meat demand is price inelastic

i.e. a decrease in the price of goat meat does not necessarily lead to the purchase of more goats.

Similarly, an increase in price does not result in a significant decrease in goat meat demanded and purchased

# THE DEMAND FOR GOAT MEAT

## PURCHASING DECISIONS

- Ethnic people may expend great effort to keep their identification from being merged into dominant society
  - The consumption of goat meat is interwoven into this fabric of tradition and religious observation

- *Example:*

The quantity taken and prices of goat meat rises dramatically each year at Christmas, Easter and Ramadan

- Persistence in maintaining...
  - Ethnic practices, habit, tradition or religious beliefs

Demand for goat meat is relatively inelastic

# THE DEMAND FOR GOAT MEAT

## PURCHASING DECISIONS

- Income can be associated with price sensitivity
- Ethnic consumers can be categorized into two groups:
  1. New immigrants (less than 10 years in Canada)
    - Generally lower average income, younger, price sensitive
  2. Established immigrants (more than 10 years in Canada)
    - Higher income households, older, spouse and children, not as price sensitive – seek convenience and healthier options
- After 10 years they are mostly settled
  - Starting to shop for quality and value rather than the lowest price

# THE DEMAND FOR GOAT MEAT

## PURCHASING DECISIONS

### Quality and Freshness

- Freshness and quality continually ranked among the top factors in goat meat purchases

**TABLE 4.** Important qualities for goat meat (%) of preferred store

Ethnic Group	African	Caribbean	European	Middle Eastern	South Asian	South East Asian
Freshness	85	72	57	78	59	89
Good quality, Better cuts	39	41	33	29	27	40
Good price	27	23	21	32	36	55
In-store butcher	38	14	11	32	34	51
Trusted store	56	23	20	60	46	69

# THE DEMAND FOR GOAT MEAT

## PURCHASING DECISIONS

- The availability of fresh meat was number one factor cited by all ethnic groups, when choosing where to purchase
  - Meat is a primary source of protein for most families, thus the ability to enjoy meat that is desirable in smell and colour are key determinants
- Quality associated with income and education
  - Typically groups with higher education tend to earn more than those who are less educated
  - Study found that ethnic population in GTA are largely settled and well educated
    - Consumers may place greater importance on quality characteristics, production processes, and Canadian quality standards



# THE DEMAND FOR GOAT MEAT

## PURCHASING DECISIONS

### Trust

- Trust was consistently ranked high when making purchasing decisions
- Several factors indicated the importance of trust when selecting meat:
  - Religious requirements
  - Sanitation and regulatory agencies in homeland

# THE DEMAND FOR GOAT MEAT

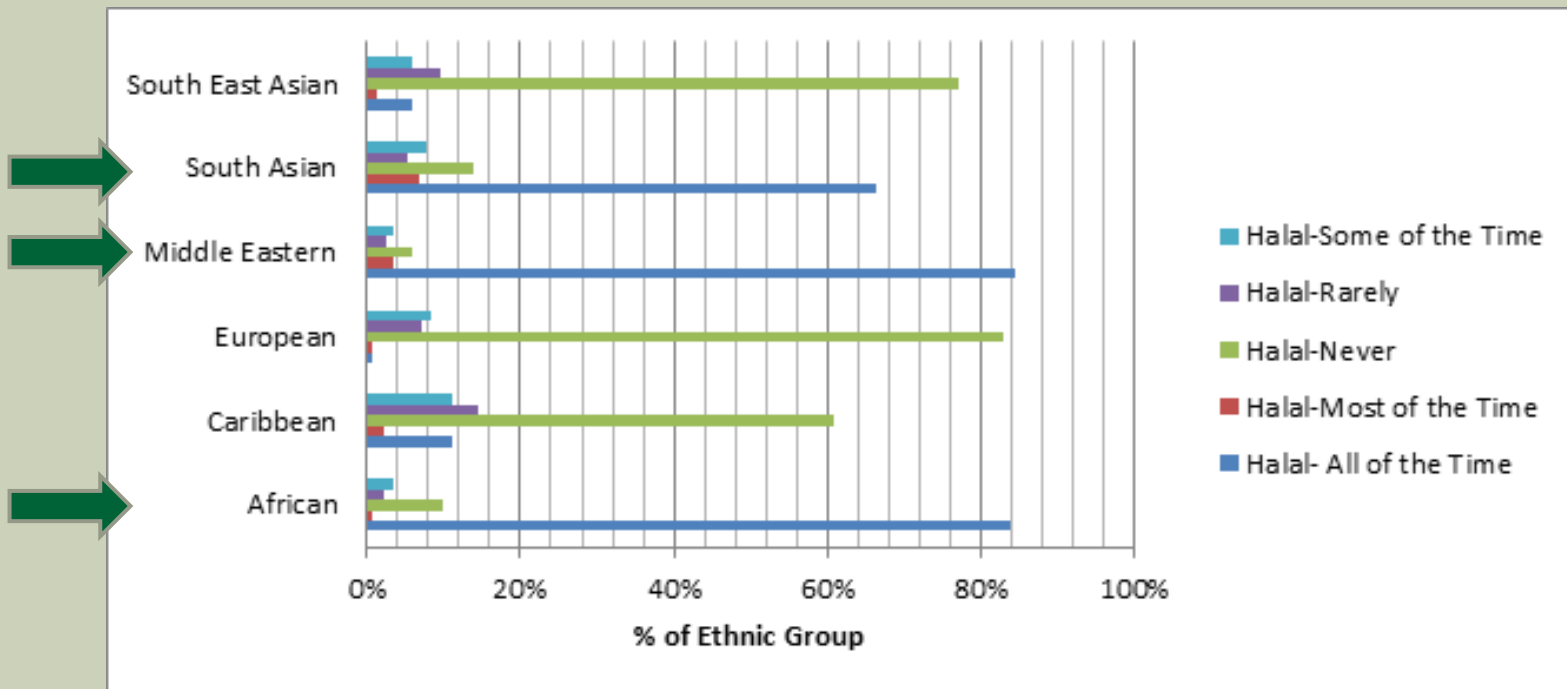
## PURCHASING DECISIONS

- Trust is mainly a concern for those of the Muslim faith who eat halal
  - Significant Muslim purchasing power in Ontario – half of which reside in the GTA (212,000)
  - Current halal meat market in GTA worth \$350 million
- Study reinforced the importance of halal to the majority of Africans, Middle Eastern and South Asians.
  - Large portion of these individuals would only consume halal products – guiding their choice in:
    - Shopping venues
    - Restaurants
    - Meat preferences

# THE DEMAND FOR GOAT MEAT

## PURCHASING DECISIONS

FIGURE 4. Adherence (%) of Halal Meat Teachings



# THE DEMAND FOR GOAT MEAT

## PURCHASING DECISIONS

### Purchasing Decisions - Summary

#### ■ Price

- Goat meat is relatively price inelastic
- After 10 years, mostly settled and found to be less price sensitive

#### ■ Quality and Freshness

- Freshness ranked first for all ethnic groups when choosing which store to purchase meat
- Lack of available fresh goat meat has an impact on purchases

#### ■ Trust

- The Muslim faith, who follow halal consumption make up a large portion of the goat meat market in Ontario

# ONTARIO GOAT'S NEXT STEPS

OPPORTUNITIES AND CHALLENGES

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# ONTARIO GOAT'S NEXT STEPS

## OPPORTUNITIES AND CHALLENGES

### ■ Year-round demand

- A booming market exists in the GTA and can be established into a mainstream meat market
  - Everyday consumption
    - Results from study suggest ethnic groups high demand for goat meat and is being consumed more frequently
    - Need to make high quality Ontario goat meat more readily available in supermarkets – Fresh rather than frozen
  - Enhanced demand for holidays and special occasions
    - Price is less of a factor, but emphasis on quality, freshness and trust
    - Imperative to have a full understanding of the demand during these holiday times
      - Account for weight, age and religious requirements

# ONTARIO GOAT'S NEXT STEPS

## OPPORTUNITIES AND CHALLENGES

### Next Steps...

- **Increase availability and accessibility** of fresh Ontario goat meat in mainstream grocery chains
  - Target those situated in highly dense ethnic areas of the GTA
  - Ensure that halal meat be properly labelled and appropriately situated in stores
- **Develop 5 year Producer Planner** for ethnic holidays
  - Calendar of ethnic holidays where goat is often consumed
  - Include the favoured specifications (goat age, weight, etc.) for specific holidays and religions

# ONTARIO GOAT'S NEXT STEPS

## OPPORTUNITIES AND CHALLENGES

- Continued population growth
  - Will lead to greater overall demand for goat meat
  - Two emerging markets that must be targeted:
    - New immigrants
      - accustomed to eating goat regularly (at home and in restaurant)
      - Established demand for goat and willing to pay
    - Second and third generation ethnic Canadians
      - more adept to western culture/palate
      - Familiar with consuming goat meat, but less knowledgeable of and, willing to prepare



# ONTARIO GOAT'S NEXT STEPS

## OPPORTUNITIES AND CHALLENGES

### Next Steps...

- **Market to the next wave of goat meat consumers**
  - **Encourage the consumption of Ontario Goat meat**
    - Make consumers aware of the availability
    - Promoting quality and freshness
    - Produce literature for goat meat preparation
      - Include recipes for different ethnicities, occasions, etc.
  - **“Bring tradition home, to Ontario”**
  - **“Celebrate with fresh Ontario goat meat”**

# ONTARIO GOAT'S NEXT STEPS

## OPPORTUNITIES AND CHALLENGES

- Exposure in ethnic restaurants
  - Increasing number of goat dishes being featured
    - Meet demands of ethnic groups accustomed to goat on menu
    - Opportunity to increase traditional Canadians' familiarity with, and acceptance of goat as an alternative meat
      - Consumers are more willing to try goat meat if served in an ethnic restaurant

# ONTARIO GOAT'S NEXT STEPS

## OPPORTUNITIES AND CHALLENGES

### Next Steps...

- Work with chefs in ethnic restaurants in the GTA
  - Featured dishes using Ontario goat meat
  - Appeal to ethnic consumers familiar with goat meat
  - Encourage the evolving western palate to try goat meat

# THANK YOU.

This study was conducted by:

Integrity Intellectual Property Inc. (and Associates)



*This project was funded in part by Growing Forward 2 (GF2), a federal-provincial-territorial initiative. The Agricultural Adaptation Council assists with GF2 delivery in Ontario.*



and funded together with:

Ontario Veal

Ontario Rabbit

Ontario Sheep Marketing Agency

