

MEAT GOAT DEMOGRAPHICS AND NICHE MARKETING

[DEMOGRAFÍA DE LA CABRA DE CARNE Y MERCADEO DE NICHOS]

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SUMMARY

Six focus groups were conducted with each having ten people who attend different Islamic Centers in Ohio. The objective of the focus groups was to understand Halal meat purchase patterns and consumption patterns of the Moslem population with special attention to goat. The Ohio State University Extension personnel are utilizing these results to work with meat goat producers to understand and meet the requirements of the Halal meat market. Participants discussed the Zabiha approach to slaughtering animals as the most merciful by causing the least pain. Many participants noted they had no way of knowing where the animal came from and this held tremendous concerns relative to the feeding of animal by-products, use of hormones, and adulteration with pork. These trust concerns led to decisions about where to purchase their meat with 72% purchasing from a Moslem owned retail store. Only 13% purchased from a large grocery and 8% direct from a farmer. Participants indicated their consumption patterns according to weekly, seasonal, and holiday use in addition to variations according to their personal geographic origin. The average meat purchase was 23 pounds with an average occurrence of 12.5 times per annum. Purchasing trends indicated that 78% prefer lean over marbled cuts. Nearly 86% prefer fresh over frozen goat meat and nearly a third responded that they would pay more for fresh. Intact males were preferred by 42% of the respondents. Preferences for meat goat cuts were: Leg (71%), Chops (42%), Shoulder (24%), Breast (7%). Nearly a third indicated they also want the kidneys, heart, or head. Demographic shifts in the United States indicate that there are almost 53 million people who have a preference for goat meat. There are 2.4 million goats in the US according to the 2007 Agricultural Statistics. Based on consumption trends of this study, goat demand exceeds inventory by 160%. Meat goat consumer trends are changing regarding religious concerns, convenience, food safety, and food quality issues. Opportunities exist to develop niche marketing opportunities for fresh goat with local ethnic or faith based populations.

Key words: *Meat Goats, Demographics, Niche Marketing*

INTRODUCTION

The Business Research Group at the University of Dayton conducted six focus groups with people who attend Islamic Centers in Ohio. Three focus groups were conducted with people who attend the Greater Cincinnati Islamic Center in West Chester, Ohio. Three focus groups were conducted at the Cleveland Islamic Cultural Center in Parma, Ohio. There were approximately 10 participants in each of the groups. In both Cincinnati and Cleveland, the group participants were recruited by the Islamic Centers. A single focus group of primarily Somalian meat market owners and consumers was conducted in Columbus, Ohio. Additionally, a written survey had 84 participants from the Greater Toledo Islamic Center indicate their purchase and consumption preferences.

The objective of the focus groups was to understand in general, Halal meat purchase and consumption patterns of the Moslem population in Ohio with special attention to goat. In each group, after an explanation of the nature of focus groups, the topic was introduced as follows: "We are going to talk about your purchases patterns with respect to meat in general but have a particular focus on Halal meat. Ohio State University is working with meat producers in Ohio to understand what the requirements of the Halal meat market are and what producers need to do to meet the requirements of that market". Questions in the survey were predetermined to gain information relative to goat consumption patterns, purchasing patterns and preferences, and special circumstances for the purchase of goat meat.

RESULTS AND DISCUSSION

Meat consumption patterns

Thinking of your household's consumption of meat products, of whatever type, both when you eat out and when you eat at home how often do you eat meat?

For most respondents meat was consumed every single day and often twice a day. There were some respondents who indicated they might eat it every other day, but they were the exception. At the same time, some participants took pains to note that it might only be a small part of a meal with several other dishes and ingredients involved so that meat was not necessarily the center piece.

What meats constitute the bulk of the meat you eat?

There were a wide variety of responses but participants could seemingly be divided into three general groups. There was a group of respondents that were either born in the United States or were from particular parts of the Middle East (Lebanon, Palestine, Iran) who predominantly eat chicken or beef with occasional use of fish or lamb. There was a second group from the Middle East of primarily Arab origin who supplemented the chicken consumption with more lamb consumption and less beef. Finally, there was a group of participants from Pakistan and India who consumed chicken, goat and lamb predominantly. Participants in both Cleveland and Cincinnati noted that those from the Middle East were more likely to eat lamb and those from India and Pakistan were more likely to eat goat.

While a substantial number of participants consumed beef, in all six focus groups participants brought up very specific concerns about beef linked to issues about cows being feed animal byproducts.

Participants were asked to rank order meat preferences in percent or however they would choose. For some participants, the choice between goat and lamb was tied to quality. Several participants made the choice between lamb and goat based on availability. In this regard, participants noted everybody prefers goat but it's not available. They went on to comment that they would eat goat every week if it was available. Nearly 85% of Somalians in Columbus would prefer goat meat if a good quality product is available for a reasonable price. They use lamb when goat meat is not available to them during certain times throughout the year. The Somalians will also substitute Halal chicken and beef if lamb and goat meat are not available. They perceive goats providing leaner meat compared to lambs. When asked about the difference in carcass preference between the meat goat and the dairy goat, they responded that there is only one kind of goat in Somalia. They generally eat the males and use the females for milk production and reproduction of kids.

Participant views of what constitutes Halal Meat

We are going to be speaking of Halal Meat, so what does the term Halal meat mean to you? Is there a

continuum here or is it a very discrete thing. For example, would you view some meat as preferable to other meat if it had been butchered in an appropriate way but not by a certified Halal meat butcher?

There were essentially two camps among the participants with respect to what constituted Halal meat. At one level, participants noted that Halal meat simply referred to all meats that was acceptable for a Moslem to eat. This included any meat (excluding pork) as long as the blood had drained from the animal before it died.

Participants then used the term "Zabiha" to refer to Halal meat that had been slaughtered in the appropriate fashion. The elements of an appropriate slaughter included: 1) a quick and merciful slaughter that allowed the blood to drain from the animal. The Zabiha approach to slaughtering was the most merciful and caused the animal the least pain noting that it was important that the goat or lamb never see the knife and that the knife should be very sharp. 2) a prayer to God. "When you slaughter an animal it should be slaughtered in the Name of God (Allah)".

Participants noted that in general "Halal" often gets used for "Zabiha". In several of the groups there was active discussion as to whether only the prayer is important or the appropriate slaughter technique is also important. Participants noted that "Some people take the position that any meat you buy at is Halal because it was Christians or Jews doing the slaughtering so we don't have to worry in this country" [in contrast to India where Hinduism dominates]. Some noted there had been specific statements in the Quran that eating the meat of the People of the Book (Christians and Jews) was acceptable. In several of the groups, there was a mention that kosher meat was acceptable noting that kosher is actually stricter than Zabiha since not just a cleaning of surfaces and equipment is required where pork had been, but totally separate equipment was required. Finally, participants often brought up concerns that animals were being "fed animals or pig by-products". Many participants noted, they had no way of knowing where the animal slaughtered came from and this was of tremendous concern. This may be the most important point learned in the discussion from the viewpoint of Ohio meat producers. The Moslem population interviewed is extremely worried about the provenance of the animals they consume. They would like to know that the animal had not been fed any animal by products and that none of the meat was adulterated with pork.

Meat Shopping Patterns and Attitudes

Where do you shop for meat?

In each of the groups, most participants indicated they shopped at a Halal market/grocery that typically would have other ethnic spices and foods as well. In the

Cincinnati area, participants were aware of three or four Halal meat markets. In Cleveland there were far more noted. Some noted they would periodically go to Detroit because there was a slaughter house in Detroit. Others acknowledge buying meat from large grocery chains. The cultural sensitivity about not buying from a recognized Halal source was illustrated in one group. When asked directly if anyone went to the regular grocery store, one woman said she wanted to be honest in a holy place, she did go to the grocery store but when she got home she cleaned it and said a prayer over it. There was an immediate buzz around the table from people who appeared embarrassed that she would say it. She then went on to say that it was due to cost because Halal meat is very expensive. In order to remove the need for personal confession, the groups were asked what percent of the Moslems they were aware of shopped at regular grocery stores for their meat. Estimates varied from 30% to 50%. Participants also noted that this had started to decrease with respect to beef consumption since a story on “60 Minutes” had revealed that up to 30% of ground beef included other meat which might be pork. As a consequence, those who still purchased from regular grocers described picking out a roast themselves and asking the butcher to grind it for them. One noted she would purchase an Amish brand that is more cleanly. In part, the Amish brand purchase was linked to the idea that you could know that a practicing Christian or Jew had conducted the slaughter rather than an unbeliever.

Participants had some experience in purchasing direct from a farmer. In these cases, participants said that practice had been more frequent several years ago when there were not as many Halal meat outlets as there are currently. In many cases, the trips to the farmers are associated with the practice at Hajj of sacrificing an animal. Typically, the participants noted they would conduct the slaughter and ask the farmer to do the rest of the butchering. Farmers were mostly found through word of mouth.

None of the participants appeared to go to specialty retail butchers who were not Halal because of concerns about contamination with pork. Almost no participants had ordered Halal meat on the internet. They noted they had concerns about freshness and not being able to see the meat.

Of all these establishments we've discussed, where would you prefer to shop for your meat?

The immediate response in every group to this question was “the regular grocery store”.

Almost all participants experienced their current meat buying process of going to the Halal store as extremely inconvenient. In part, this almost universal first response was tied to participant descriptions of going once or twice a month to the Halal market (in some

cases a lengthy trip), buying many pounds of meat and cutting and freezing it when they got home. Several participants in each group have a large freezer at home in order to accommodate this practice. Several expressed an active dislike of going to the Halal store. Beyond the inconvenience of the Halal market, participants often felt that a regular supermarket would tend to be more hygienic, have better packaging, and provide a broader array of cuts.

What are the characteristics of the place you prefer to shop for meat that are important to you?

There was a remarkable uniformity across the groups in the initial responses to this question. Almost the first word out of everyone's mouth was “Cleanliness” or “Trust”.

The trust issue often involved trusting that the Halal meat being purchased really was slaughtered in the appropriate manner with the proper prayers (Zabiha) said at the time of slaughter. There were some concerns about health issues at Halal markets with some participants noting they felt it was important to know the store had been inspected. Another participant felt packaging was an important characteristic in that sometimes when you buy at a Halal meat place it's not packaged well and the juice leaks out. As a follow-up, participants were asked: *Must it be owned by a Moslem?* While participants indicated ownership by a Moslem was not important as long as the meat was Zabiha, they felt it was easier to trust that it was Zabiha if the owner was a Moslem.

Details on Halal Meat Consumption

Are there particular holidays or special days when you would consume more Halal meat?

Across all focus groups there was agreement that meat consumption rose substantially during Ramadan due to the rounds of parties and impromptu visits that were typical after the sun fell. Because of concerns about availability problems, many participants report stocking up in their freezers prior to the start. Participants pointed out there would tend to be an increased consumption of lamb and goat because more special recipes were cooked at this time.

Every group mentioned that the second time where consumption increased was in the last month of the lunar calendar (Zulhijjah) on the Day of Sacrifice (Eid-ul-Adha). There is a requirement that every person who is able, to financially sacrifice an animal. The rules for distribution of the meat indicates one third should be given to the poor, one third to family and friends, and one third for yourself. Due to the difficulty of finding an animal to sacrifice, it has become the custom for those that are not born in the United States to send money to their home country to have the sacrifice done as more poor people can be

fed. Here, slaughter is usually arranged through a Halal store where someone else can do all the aspects of butchering. One focus group specifically suggested there was a market opportunity for a farmer that advertised their willingness to provide sacrifice goats on this day

Meat Purchasing Patterns

When you purchase Halal meat how many pounds do you purchase on average?

The responses varied from 10 pounds on average every couple of weeks to 15 to 20 pounds depending on family size. One participant noted that we should think of average meat consumption as the same for other American families so if they are consuming primarily goat, it might be 270 pounds per year.” In general, participants had noted they were stocking up on meat when they went to the Halal store because they only went one to two times a month. Most Moslem people or Arab people have a freezer. The Somalis preferred a 35-40 pound carcass because their perception is that carcasses over 40 pounds are from older goats and will lack quality. They believe a trim, tender carcass will cook fast. The smaller carcasses are usually stuffed and served whole with vegetables at larger family dinners. They prefer a lean grass fed carcass to a grain fed goat. Most indicate that they can tell the difference between grain fed and grass fed in the smell when you cook the goat and the taste and texture of the meat.

Are you willing to pay more for fresh relative to frozen Meat?

Participants in general preferred fresh relative to frozen meat because it enabled them to judge how recently it had been slaughtered. They noted they would often be taking the meat home to freeze it themselves because of the infrequency of their trips to the Halal market. Most participants noted they will ask their Halal market person how fresh the animal is. Several participants noted they call the market on a regular basis to see when the meat shipments are coming in. Several also noted they order from the Halal meat market in advance and pick up on the day the meat comes in. While participants clearly preferred fresh to frozen, they were also very price conscious. It was clear that many of the women would have difficulty initially choosing something that was frozen because of their desire to gauge qualities of the meat from smell, color and touch.

The focus group identified some average retail prices for goat meat. They identified \$1.99 per pound for frozen goat meat and \$2.99 per pound for fresh goat meat. Price was an important issue for many participants. In Cincinnati, there was a discussion that a large specialty store tried to carry Halal meat but that it had failed because they were charging too high a

premium at \$3.50 per pound. In Cleveland, a retailer had kosher hotdogs but was charging \$4.00 per pound and no one would buy them at that price.” Somali meat market owners reported buying imported frozen goat carcasses cheaper than fresh goat as they can buy them cheaper and estimated that 15-20 % of retail price is the transportation costs to and from Detroit to obtain the product.

When you shop for Halal Meat, do you prefer a whole carcass or specific cuts?

As noted in the prior discussion on goat, most consumers are buying the whole goat carcass because of the problems of limited availability. There were some participants (with smaller families) who would have liked the option of getting just a leg or a shoulder. At the same time there were participants who felt they would want the whole carcass anyway because “there is not much meat there”. Intact males were preferred by 42% of the respondents. Preferences for meat goat cuts were: Leg (71%), Chops (42%), Shoulder (24%), Breast (7%).

Are any by-products from the processed Halal Meat important to you?

With respect to goat, almost every part of the goat was mentioned by a subset of participants. These included the tongue, neck, liver, brain, kidneys, heart and lungs. Livers and kidneys are a desirable breakfast food, but are in short supply from Detroit because they do not take the time to remove them and clean them for consumption. Skins can be harvested from the goats and are made into purses and wallets. Organs and entrails are processed into cat and dog foods. The heart and brains can be eaten, but are not desired by many Somalians as a food source. The group indicated that there would be a market for stomachs if it were easier to clean them without using chemicals since it is a time consuming and laborious effort for a low value product. Somalians are accustomed to feeding their babies goat milk but use cow milk because of the limited availability of goat milk in Ohio and the U.S. They use goat cheese but do not prefer it to cheese made from cow’s milk. They do prefer using goat butter, but the supply is very limited. In the context of by-products, there were concerns raised about substitutes for gelatin. In the United States participants felt they mostly use gelatin from a pig source. This concern extended to medicine capsules.

CONCLUSION

Demographic shifts in the United States indicate that there are almost 53 million people who have a preference for goat meat. There are 2.4 million goats in the US according to the 2007 Agricultural Statistics with production increasing by 4% per annum. Based on consumption trends of this and other studies, goat

demand exceeds inventory by 160%. There has been a dramatic increase in the number of goats slaughtered in USDA federally inspected plants. Total head slaughtered increased 45.1% from 1998 to 2003. However in 2003, the U.S. imported more than 18 million tons of goat meat. With an average carcass weight of 35 to 40 lbs., an estimated 500,000 goat carcasses were imported. Current demand estimates indicate a need for 3.1 million goats. As the industry has grown, so too has the market infrastructure in Ohio. Producers must realize that our markets are dependent on demographics, supply/demand, and cultural preferences. Accessing the ethnic/religious markets can currently be accomplished through public live auctions, direct-on-farm sales, brokers, meat purveyors and networks/alliances. These have been good outlets at most times and average prices have seen increased strength over the past couple of years due to increased numbers, Ohio being recognized as a good source for quality goats, and the development of graded pooled sales. Direct on-farm sales have worked for several producers and has increased profit margin. Challenges include cultural differences, consumer and producer education, and having a place for harvest. Meat goat consumer trends are changing regarding religious concerns, convenience, food safety, and food quality issues. Also, chevon is a healthy meat and fits the designer diets of health-conscious Americans. Goat production is a great opportunity for small farm producers to target these markets and diversify their farm products. Opportunities exist to develop niche marketing and value added opportunities for fresh goat with local ethnic or faith based populations.

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