

***Survey of the  
marketing concept for  
organic goat meat  
in the Netherlands***

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meat in the Netherlands  
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# *Introduction*

This survey gives insight into the marketing concept for organic goat meat in the Netherlands. The study is part of a European project surveying existing marketing concepts for goat meat within Europe. This report provides answers to the following questions:

- What is the relevance of organic goat production in the Netherlands?
- What are the marketing channels for organic goat meat?
- At what age are goat kids slaughtered?
- What are the goat meat products being sold (fresh/frozen, sausage etc)?
- Is the supply of goat meat seasonal or year-round?
- What types of consumers buy goat meat?
- What types of restaurants offer goat meat on the menu?
- What are the specific bottlenecks for goat meat marketing?
- Are there any initiatives to solve these bottlenecks?
- What literature can be found on organic goat meat?

The abovementioned questions are leading for the structure of this report.

## *Background and methods*

Goat meat is a new product for the Dutch consumer. Establishing this new market requires entrepreneurial skills and persistency. In the Netherlands there is a small group of pioneers who has gained a fair amount of experience with rearing goats and marketing goat meat. This study specifically maps their experience. The survey included short questionnaires and interviews by telephone. The president of the sector organisation for organic goat farmers, 'De Groene Geit', has also been interviewed. Furthermore, a literature search was conducted. Relevant and supporting literature (research reports, journal articles, presentations and other relevant publications) can be found in the attached literature overview.

# 1 *Relevance of organic goat production in the Netherlands*

This chapter sketches the context in which the market for organic goat meat is being developed. Therefore it is important to have an idea of the conventional goat and kid meat sector. The other chapters focus exclusively on organic goat meat.

In the Netherlands dairy goat farming is a relatively young and growing market sector. In 1984, when milk quotas were introduced for cow milk, many farms started milking their goats. Since then the total stock has been growing with around six thousand goats per year. By 2000 the number of goat farms amounted to 275, representing a total number of at least 96,000 goats. By 2010 the number had grown to 340 farms and at least 221,000 goats (source: Productschap Zuivel/ CBS landbouwtelling). The average size of a conventional Dutch goat farm is around 900 goats (source: Productschap Zuivel); for organic goat farms the average size is 400 goats (source: Skäl). Currently there are around 60 organic goat farms, of which 30 farms supply milk to a factory (10 million litres of milk per year). The other 30 farms process their own milk into cheese. In Europe the Netherlands are known for the high quality of the goat milk, with high levels of fat and protein making it especially suitable for processing into cheese, yoghurt and quark. The Netherlands counts 11 milk processing facilities, of which 7 process organic milk.

Every year approximately 270,000 kids are born on conventional farms, compared to 20,000 on organic farms. All kids are sold through specialised goat fattening companies, mainly through 'the Pali Group'. This is an internationally operating livestock trading organisation and also an important producer of veal and goat (kid) meat for markets within and outside Europe. The Pali Group collects kids throughout the country. Since the last few years these kids are fattened on own or contract farms of the Pali Group and slaughtered in the Netherlands. The Pali Group has branches in the Netherlands, Belgium, Germany, Italy and Spain. Despite this broad market perspective the Dutch goat sector is facing an oversupply of (conventional) kids. Market and chain development on a sector level is the most appropriate direction for solving this problem. Reduction of supply is also needed, but this depends on individual farmers, and would provide a more long-term solution (Meuwissen et al, 2009). Next to this initiatives are taken to introduce goat meat onto the Dutch market through wholesalers like Hanos and Deli XL. Such initiatives are still in a very early stage and limited in volume. For the Netherlands goat meat is a new product and as of yet a market has not been (firmly) established.

Farms which process and market their own cheese often also market their goat meat. These farms are usually small (on average 100-200 goats per farm), and marketing the meat is an easy step from marketing their own dairy products. These farms sell about 30 to 50 organic goats a year (Source: questionnaire among goat farmers). In the past three years a total of 300 organic goats a year were sold in the Netherlands (Source: questionnaire among goat farmers).

The remainder of this report focuses on sales and marketing of **organic** goat meat.

## Market development organic goat meat

In the period of 2005 to 2007 the first pioneers started selling organic goat meat. In 2008 sales increased rapidly as various restaurants and culinary journalists brought it to attention (see Articles in Literature and references). The group of goat keepers selling meat grew to about 20 farms, of which around 10 actively worked on professionalization. For instance, to present a more uniform product to the market, a distinction was made in age groups: Capretto is meat of kids no more than 10 weeks old that have had predominantly milk; Chevron is meat of goats of 5 to 7 months, which have had abundant roughage and exercise (Eleveld, 2008). Capra Select is meat mostly from goats selected out from the milking goats (source: [www.geitenvlees.com](http://www.geitenvlees.com)). These three types of meat each have their own taste and quality.



*Capretto* is de naam voor een zuiglam: een geitenlam van 8 tot circa 10 weken. Het lam krijgt alleen biologische melk. De smaak is zacht en vol, niet te vergelijken met ander vlees.



*Chevon* is een geitenlam van 5 tot 7 maanden. Dit lam heeft naast biologische melk ook ruwvoer en granen gehad. Het lam heeft kunnen genieten van een buitenruimte. Door de beweging heeft het lam al meer spieren ontwikkeld, wat terug te zien is in de structuur van het vlees. Het vlees krijgt meer karakter en ontwikkelt, net als wild, een heel eigen smaak. Deze wordt nog versterkt doordat het vlees na de slacht is gerijpt.



*Capra Select* is de verzamelnaam voor de geiten, het merendeel vrouwelijke dieren, ouder dan 7 maanden maar niet ouder dan 2 jaar. De geiten zijn geselecteerd op vleeskwiteit en minder geschikt als melkgeit. Ook deze geiten leveren mooi vlees. De smaak is nog meer uitgesproken.

*The three types of meat by [www.geitenvlees.com](http://www.geitenvlees.com) (Source: flyer on goat meat)*

Because of Q-fever and the recession there has been a setback in the growth of the number of farms. By now there are around 10 farms left which produce goat meat, of which 7 on a regular basis. In 2011, 5 of these pioneers have set up a joint initiative in order to coordinate marketing: 'Geitenvlees.com'. The goat farmers of 'Geitenvlees.com' are looking for joint sales, joint reduction of costs and joint public relations.

## *2 Marketing channels for organic goat meat*

Organic goat farmers have to find a market for their goat meat on their own. There are no intermediaries who come to the farms to buy the meat. This results in a variety of marketing channels being used by farmers. Mostly the meat is sold on-farm, at farmers markets and to restaurants. These restaurants identify themselves with local and organic products and are often inspired by 'slow food'. (see also chapter 8). Some farmers also deliver to specialised butchers, delicatessen shops, web shops and organic food stores. Occasionally organic goat meat is sold to catering companies.

Based on the questionnaire among goat farmers, it can be concluded that over the past three years most organic goat meat was being sold in packages of deep frozen meat on farmers markets and in farm shops (65%). Twenty percent is sold fresh to restaurants and the rest is processed and sold for example as sausage (15%).

### *Certification*

Farmers prefer to sell their goat meat as fully organic certified, for the meat is produced fully organic. In practice the meat is not always sold as organic certified. The reason is that to sell as organic, the whole production chain must be certified as organic, including the slaughter house. In the Netherlands the number of small, traditional slaughter houses has decreased significantly over the last decades. As certification is relatively expensive, the number of certified organic slaughter houses is very limited. For the farmer a short distance to the slaughter house is important, for the well-being of the animals and the quality of the meat (temperature during transport). Efforts are made to lower organic certification costs for small traditional slaughterhouses and butchers.



### *3 Kid production and slaughter age*

The rearing and fattening of lambs for kid meat takes place at the dairy goat farms. There is a large variation in facilities and feed, which results in a large variation in slaughter age as well as meat quality. Mostly the lambs are separated from their mothers one day after their birth and get organic powder milk after two days. At about 10 weeks they start eating concentrate (grain) and roughage. At four months they are also allowed to graze.

Slaughter age varies strongly from farm to farm, depending on possibilities on the farm, such as time and space available. Mostly, Caprettos are slaughtered at 10 weeks, with a carcass weight of around 10 kg. The lambs sold as Chevons are 5-7 months old when slaughtered, with carcass weights at 18-20 kg. These lambs have been fed roughage and have been allowed outside. Goats beyond this age are mostly sold as processed meat for sausages and hamburgers. The age of the animal has of course influence on the taste of the meat. The taste of a Capretto is welcoming, full and creamy, somewhat sweet (Eurotoques Magazine). Only at the age of seven months one speaks about meat 'with character' (Eleveld, 2008). Remarkable is that the taste of an animal older than 1 ¾ year was judged very positive by a panel of culinary experts, during a blind tasting event (see also chapter 7).

## 4 *Goat meat products*

Preferably the farmer sells the meat of the complete carcass, as this way he can sell the whole animal at once. But this is only possible when selling to restaurants or butchers who can bone the carcass themselves. In farm shops the meat is also sold as frozen box scheme packages containing mostly Capretto meat. These packages consist of haunches, the back, shoulders, ribs, chops, legs, soup meat, liver and other organ meat. The packages weigh about 8-10 kg each, at € 20/ kg excl. VAT (Source: Ria Fokkink). The actual sales price of a Capretto is € 15/ kg which is for a Capretto on carcass (not boned yet). A Chevon on carcass is sold at € 12/ kg on average to for example – butchers. For boned meat the average sales price comes to € 20/kg excl VAT (Eleveld, 2008).

## *5 Supply of goat meat during different seasons*

The supply of goat meat is year-round, as deep frozen meat or dried sausages etc. As fresh meat the Capretto is available roughly from April until August and the Chevon from August until November. Most farmers market their lambs seasonally, when the lambs are ready for slaughter.

## 6 Consumers goat meat

The keywords of the present food consumer trend are health, convenience, local and sustainable. In the latest trend sustainability is a given, the focus shifting to ethics and the human dimension (Ammerlaan, 2009). This means, for the target group of organic consumers, that in addition to 'organic' also factors such as attention/care, enjoyment, transparency, the story of the producer and authenticity play an increasingly important role. Figure 1 illustrates this development, in which separate groups adopt a new trend for their own motives. In the case of goat meat two groups can be distinguished in the Netherlands. One group consists of immigrants for whom the taste of goat meat is familiar, and who are more focused on price. The other group consists of native Dutch, who care less about price and more about new tastes and culinary values. The latter group are generally higher-educated people in their thirties as well as babyboomers looking for new tastes and intrinsic flavours of simple and honest products (Bouwknegt, 2010). In terms of the trend curve (Figure 1), goat meat is adopted by a group of Dutch native 'innovators'. Later on they may be followed by a larger majority, but this is not yet the case.

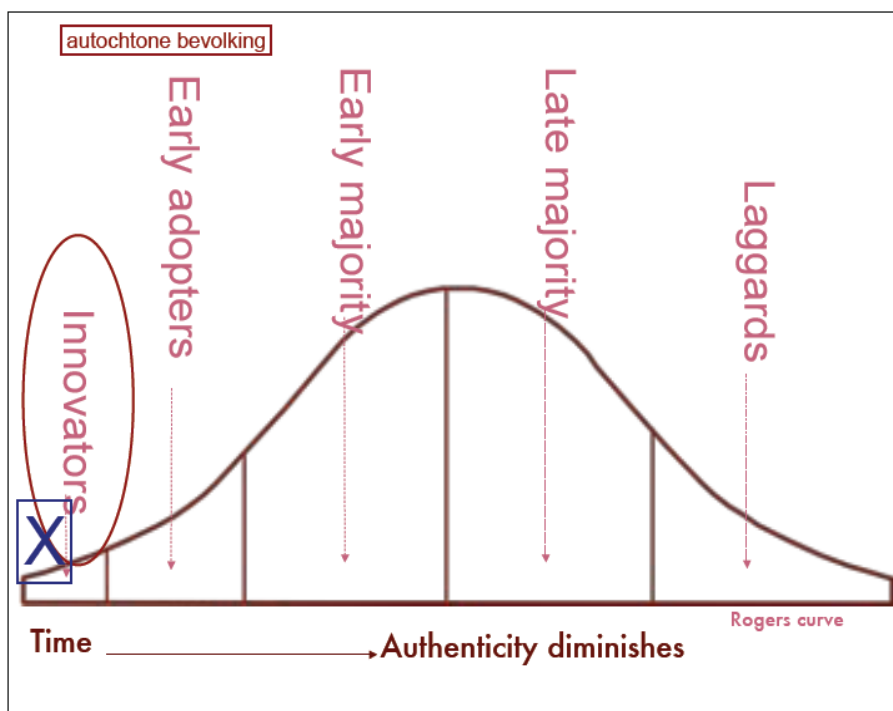


Figure 1: trend curve van Roger

Innovative consumers, or 'foodies', want to know what they are eating, and prefer regional and seasonal products. They are food lovers in the first place, shop at farmers markets and love culinary cooking on the weekends. Important for them is the 'feel good factor' and 'personal touch' of the product. Each product has a unique 'character' (Bouwknegt, 2009).

In summary, culinary trendsetters are the main target group for organic goat meat.

## *Approaching the 'foodies'*

To approach the group of innovative 'foodies', taste is the most important. Foodies are willing to go to special shops or buy the meat on the farm. But they are not regular customers. The product is what matters! They also browse the internet and web shops searching for product information or recipes. These consumers require an individual approach. To introduce a new product such as goat meat to this group of consumers, local initiatives and tasting events at restaurants or chef trainings are a good start.

The Unique Selling Points of goat meat are:

- Unique taste, a culinary challenge
- Local product with a 'personal touch'; animal-friendly production
- Seasonal product: Capretto in spring; Chevon in autumn
- Healthy, natural meat, free of antibiotics

## 7 Restaurants

The number of restaurants that have goat on the menu is very limited in the Netherlands. It's obviously the cultural creative's who pick on such kind of new products. Products that fit in a trend of fresh, authentic, pure, burgundian, slow food. Story telling of the product (where it comes from etc. etc.) is important, preferably told by the cook himself. The 'foodie' loves a natural, traditional kitchen. The Italian kitchen makes place for the English kitchen, with lots of recipes in the oven (Ammerlaan, 2009).

One of the best known ambassadors for goat meat in the Netherlands is Nel Schellekens, chef at 'Gasterij de Gulle Waard' in Winterswijk. She has built up a tremendous experience preparing goat meat, and in particular *organic* goat meat. One of her promotion activities was a blind tasting event for a group of thirty culinary experts, held in February 2009. She prepared goats from different age and sex with different recipes. The taste in general was described as welcoming, soft and fine. The meat has a nice full bite. In particular the slow preparation gives the meat its fine flavour, both for the Capretto and the Chevon. Remarkable is that the taste of a male goat older than 1 <sup>3</sup>/<sub>4</sub> year was judged very positively by a panel of culinary experts. Among the shortly grilled meat the rack of the buck scored best. Among the slowly grilled meat the bock beer stew of Chevon scored best (Schellekens et al. 2011).



*Blind tasting event of a group of thirty culinary experts*

## 8 Bottlenecks for goat meat marketing

In the pioneer phase it is difficult to match demand and supply. There is a lack of continuity in volume and quality and farmers have to find customers for their goat meat. This costs much time and energy. As the production is small-scale, it is also labour and cost intensive.

Typical bottleknecks for goat meat marketing are:

- As it is a totally new product, the whole chain has to be motivated to adopt something new. There is no reference from the conventional sector (like there was, for example, for the introduction of organic veal in the Netherlands). In particular the lack of experience of cooks and butchers with preparing goat meat is an important bottleneck.
- Goat meat has a very typical taste which is not appreciated by everyone at once, like is the case for mutton. It is essential to prepare it the right way, in order to get the nice taste. In order to win the favour of consumers, products have to be developed in which the meat has already been prepared and has been dried/sealed or deep frozen.
- The cost price of organic meat is relatively high, compared to conventional goat meat. The price of conventional goat meat is defined by the market in Spain and France. The production cost of organic kid meat (Capretto 50 days old) in Holland easily reaches € 14,23 per kg slaughtered weight and € 24,81 per kg slaughtered, boned and packed. The Chevon (160 days old) cost € 12,50 per kg slaughtered and € 18,60 per kg slaughtered, boned and packed (Govaerts and Van Eekeren, in preparation). The high cost price is mainly due to the small scale of the production and the high costs for the production itself (e.g. organic powder milk). In addition, slaughtering costs and the age of the animal also play a role.
- The economic value (or lack thereof) of each part of the animal also plays a role in the high cost price. It is not easy for the producer to sell the kid as a whole. Demand is often limited to luxury meat such as haunch and loin. Therefore product development is needed to get the other parts sold as well.
- Customers have high demands for quality, and also often expect a continuous supply. Goat farmers often are not able to offer this.
- Goat farmers need to put a lot of effort and energy into finding customers. This comes on top of their milking and dairy work. If there would be the possibility to have the kids fattened elsewhere (organically) many would opt for this.

## 9 Lessons learned

Certainly there are consumers for organic goat meat in the Netherlands. They are known as 'foodies', and can be found among higher-educated people in their thirties and babyboomers. The culinary world (innovative cooks and restaurants in particular) shows great enthusiasm and interest in goat meat. These ambassadors are very much needed to increase publicity for this new product. To meet the expectations of consumers, better communication is needed about the different features of Capretto and Chevon, and the skills needed to prepare a good dish. Depending on their production system, goat farmers will have to make a clear choice between raising Capretto or Chevon, and fine-tune their promotion and communication activities accordingly. Some farmers state that the Chevon has a lower cost price per kg, but not all farmers agree on this. Further research is needed.

As long as organic goat meat is produced on a small scale and marketing is done by a small group of pioneer farmers, the marketing opportunities are mainly to focus on the personal interaction with the customer. In this 'niche market' the farmer is most likely to get a good price, as there are no or few intermediaries.

Guidelines for small-scale production and marketing are the following:

- Sell at home (farm shop) and/or to local butchers and local restaurants. Also look for cooperation with (innovative) cooking schools.
- Use the 'Unique Selling Points' of sustainability (local, seasonal production) and authenticity as much as possible (the story of the farmer makes the product unique)

Strategies to scale up production and sales are:

- Work together with other farmers to combine sales
- Lower the cost price
- Work together with the conventional goat sector
- Improve product quality and uniformity
- Educate cooks and butchers, contribute to chef trainings
- Increase publicity through the media (magazines, tv )

Most important is to increase publicity and the 'feel good' factor. Communication is the key, and should stress the value of organic production:

- Healthy, natural meat, free of antibiotics
- Local product with a 'personal touch'; animal friendly production
- Unique taste, a culinary challenge
- Seasonal product: Capretto in spring; Chevon in autumn



## *Outlook / prospects*

It is to be expected that (organic) goat meat will more often appear on the menu in the near future, given the enthusiasm and positive comments of the group of trendsetting consumers and cooks. Q fever unfortunately has tarnished the image of goat meat somewhat, but it is expected that organic goat meat will gain popularity step by step, slowly but surely. Joint initiatives such as [geitenvlees.com](http://geitenvlees.com) are crucial to scaling up and professionalising the market. However, for many organic goat farmers the market for goat meat is still very difficult and small. For some of them a better alternative is to limit the birthrate by prolonging the milking period.

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# Annex 1: Questionnaire for goat farmers

- 1) How many kids do you sell on average per year (over the last 3 years)?
  - ..... kids per year
  
- 2) How many kids are sold as organic kids to the sector as a whole (estimate for all farmers together over the past three year)?
  - Around 400 kids per year
  - Around 600 kids per year
  - Other: around .....
  
- 3) Who are your most important (in terms of turnover) customers, over the past 3 years ?  
Farmers markets/ restaurants/ butchers/ farm visitors/ .....
  
- 4) What are the products you sell?**
  - fresh ..... (%), which parts: .....
  - frozen: ..... (%)
  - processed, sausage etc ..... (%)
  - box scheme package .....(%)
  - other:.....
  
- 5) Over the past three years most organic meat has been sold as...(product (question 4) - consumer (question 3) combination)?
  
- 6) Do you sell meat year-round or on a seasonal basis?
  
- 7) How would you describe the average consumer of goat meat?
  
- 8) What are your top-three bottlenecks for marketing and sales ?
  - High production cost
  - Market supply is not continuous (both in volume and quality)
  - Customers lack experience with goat meat and do not know how to prepare it
  - Insufficient marketing and publicity
  - Other.....
  
- 9) Please state relevant articles or publications: author, year published etc.
  - .....