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& DEVELOPMENT CORPORATION

Marketing Analysis and Plan for the
Camel Industry

A report for the Rural Industries Research and Development Corporation

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Foreword

Presented in this report is a detailed analysis of the domestic market for camel meat and a marketing plan to help the industry expand and improve its current position. This is the marketing component of the RIRDC–funded project ‘To develop an ecological and economically sustainable camel industry through an integrated national approach – Queensland’.

There are approximately 200 000 camels in Australia — 100 000 in Western Australia, 50 000 in the Northern Territory and the remaining 50 000 in western Queensland and northern South Australia. They are of the Dromedary (one–hump) species.

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Peter Core
Managing Director
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We also thank the wholesalers of camel meat in New South Wales, Victoria, Western Australia and Wyuna Meats. In addition we also acknowledge the assistance of the chefs, butchers and supermarket merchandise managers and meat managers consulted for their time and input, which helped us to develop strategies based on what the trade and their customers want.

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Executive summary

Presented in this report is a detailed analysis of the domestic market for camel meat and a marketing plan to help the industry expand and improve its current position. This is the marketing component of the RIRDC–funded project 'To develop an ecological and economically sustainable camel industry through an integrated national approach – Queensland'.

There are approximately 200 000 camels in Australia — 100 000 in Western Australia, 50 000 in the Northern Territory and the remaining 50 000 in western Queensland and northern South Australia. They are of the Dromedary (one–hump) species.

The Central Australian Camel Industry Association (CACIA) is the only organisation in Australia currently slaughtering and selling camel meat. It has been slaughtering around 300 camels per year since 1995, which represents approximately 49 tonnes of camel meat with an average wholesale value of $250 000.

These slaughter camels are from cattle stations in the Northern Territory; they are transported to the Strathalbyn abattoir (south–east of Adelaide) where they are killed and then boned out and packed by Strath Meats. The national distributor of camel meat is Wyuna Meats in South Australia, which sells direct to restaurants, butchers, supermarkets and manufacturers in South Australia and the Northern Territory and to wholesalers in Western Australia, Northern Territory, New South Wales and Victoria.

Most restaurants that have served camel meat are located in the Northern Territory or Queensland. A survey of restaurants that serve game found that 18% had sold camel meat at some time. The main reasons they indicated for selling camel meat were that it was popular with tourists; for variety; for its novelty appeal; and because it was bush tucker. The main reason given for not offering camel meat was lack of interest, which was attributed to a lack of advertising and awareness of the product.

Butchers in Victoria and South Australia were more likely to sell camel meat than those in any other state. Ten per cent of butchers surveyed had sold camel meat at some stage. Again the main reason given for not stocking camel meat was lack of interest, which was attributed to absence of advertising and consumer resistance to game meats.

Some supermarkets in South Australia and the Northern Territory sell camel meat; Woolworths and Coles in Alice Springs are the main outlets. Woolworths sells the largest range of camel meat including various cuts packaged in-store as well as value–added products (BBQ packs, mince, jerky) by Wild Oz, Cottage Meats, The Tall Australian and Territory Jerky. Coles sells only camel BBQ packs, which are produced and packaged by Cottage Meats.

Previous research with consumers found that those most likely to buy and consume camel meat are Territorians, tourists and Muslims. According to the trade (wholesalers, retailers) Muslims from the Middle East, Indonesia, Malaysia, Pakistan, India and Turkey were most likely to buy camel meat. Tourists were perceived to be the target market by restaurants, while butchers perceived local residents as well as tourists as the most likely buyers of camel meat.

Key weaknesses and opportunities identified by the marketing research, which need to be considered by industry, included:

Weaknesses
- inconsistent product quality;
- inconsistent supply of appropriate cuts;
- inability to secure access to *halal* and export markets;
- lack of a definable competitive advantage;

- the fact that both the trade and consumers associate the meat with the characteristics of the actual animal;
- high processing and transport costs;
- the fact that the current low–fat positioning of the meat is not supported by all cuts, as some are heavily marbled;
- the untargeted nature of some promotion;
- loss of control over product quality and distribution once the product leaves the national distributor;
- limited domestic trade interest in camel meat.

Opportunities
- renaming and repositioning of camel meat, particularly for the foodservice sector;
- development of a brand to the trade level, representing consistently high quality product and service;
- expanded use of camel meat in the foodservice sector;
- targeting of lower quality cuts at café and casual dining restaurants for wet dishes;
- development of trimmed, portion controlled products for the restaurant and café market;
- development of a coordinated, targeted communication plan focused on delivering specific messages to each of the target markets.

The primary target market identified domestically for camel meat comprises tourists, Muslims and Territorians. The secondary target market is consumers of other game meats, and the intermediaries are trade customers including supermarket merchandise managers, in-store butchers and chefs. The focus of the industry–marketing plan is improving quality so that a consistently high quality product is delivered to the target market in the format it requires. Central to the development of the industry is producing and delivering camel meat that meets trade and consumer, expectations in terms of tenderness and fat content. There are also opportunities to develop a brand and communicate its attributes to the trade, with a view to becoming the preferred supplier and building confidence in the quality of the product being delivered. For a branding strategy to succeed a product of consistent quality must be available and the attributes of what the brand represents communicated to the trade. A key component of branding is providing customers with service in the form of ongoing advice and training, and building long-term relationships with key customers; these processes will in turn lead to a better understanding of what the customer wants.

1—Introduction

Presented in this document is a detailed marketing analysis and plan for the Australian camel meat industry. This work represents the marketing component of the RIRDC–funded project, 'To develop an ecological and economically sustainable camel industry through an integrated national approach—Queensland'. Data and information relating to sales, pricing and promotion of camel meat have been provided by the Central Australian Camel Industry Association (CACIA), which is the industry partner in this project and the only producer organisation currently slaughtering camels.

Background

There are approximately 19 million camels in the world (FAO, 1998). Most of the world's camels are located in the tropics and there are significant numbers in sub-Saharan African countries such as Somalia, Ethiopia, Kenya, Sudan and Djibouti.

The Arabian camel (dromedary) has one–hump and is generally found in areas with relatively warm winters and hot summers such as Pakistan, India, North Africa, the Middle East and some parts of Australia and Russia.

The two–humped Bactrian camel is found in areas subject to intense cold such as Russia, Iran and Mongolia and is believed to be indigenous to Mongolia. This species is raised all over Mongolia, but is found particularly in the four provinces in the south (Avery Press, 1995).

It has been estimated that there are approximately 200 000 Arabian camels scattered through the arid interior of Australia. Of these it is estimated that 50 per cent are in Western Australia, 25 per cent in the Northern Territory, and 25 per cent in western Queensland and northern South Australia (CACIA, 1997).

Objectives

This marketing report had the following objectives:

- to estimate the market potential for camel meat in the Muslim, Chinese and general community markets in Australia;
- to determine the specific products required for each market segment;
- to complete case studies of the kangaroo, goat, venison and Salt Bush Dija industries;
- to develop a marketing plan in association with CACIA which when implemented will raise the awareness and consumption of camel meat by the selected target markets.

Methodology

Data and information in this report were collected from existing literature and reports, and personal communication with government and industry representatives and CACIA. Wyuna Meats, the national distributor of camel meat, was interviewed, as well as each of the state wholesalers and various manufacturers and processors currently using camel meat.

Trade interviews were conducted in November and December of 1997 by DPI in Brisbane and Melbourne using a combination of telephone, face-to-face and fax surveys. A total of 28 interviews were conducted with butchers, chefs and wholesalers. In March 1999, DPI conducted audits of restaurants and cafes selling game meats at Ayers Rock Resort and tourist stops between Alice Springs, Ayers Rock and Kings Canyon. The sous–chef from White Gums restaurant at Ayers Rock Resort was also interviewed on his use of and attitudes towards camel meat.

In March 1999, CM Research was commissioned to undertake a national telephone survey with butchers and restaurants to identify use of and attitudes toward game and camel meat in particular. A total of 72 butchers and 50 restaurants were surveyed.

From February to March 1999, information on supermarkets' use of and attitudes toward game and camel meat was collected by DPI via telephone and personal interviews with 12 meat merchandise managers from Woolworths, Coles, Franklins, FAL, Bi-Lo and Foodland in South Australia, Western Australia, Victoria, New South Wales and Queensland. Meat managers from Coles and Woolworths in Alice Springs were also interviewed, and audits were conducted in these stores in 1998 and 1999.

2—World production

A review of world production was undertaken to identify trends, that might help identify an appropriate target market in Australia for the camel meat industry. In 1998 there were approximately 19 million camels in the world, most of which are in Arab countries.

In countries where camel consumption is high it was found that most meat traded is from older camels, as younger animals are prized as a means of transport. In many cases, the animal's ability to produce milk, meat and wool are of secondary importance (Shalash, 1983). The meat from these older camels is of poor quality, which is probably the reason why camel meat is often labelled inferior and considered fit only for the poor in urban societies. In most of the Arab countries camel meat, if marketed at all, is distributed through traditional markets (souks).

Table 1 World production of camel meat, (selected countries) 1998

Country	Camel meat production (tonnes/year)	Proportion of total camel population	Comments
Somalia	200 000	32% (6.1 million)	• Largest producer of camel meat in Arab countries
Sudan	87 000	16% (3.1 million)	• Exports large numbers to Saudi Arabia, Egypt and Gulf states • Quality of meat is poor as camels mainly used for transport and slaughtered late in life • Slaughter numbers are small and unlikely to increase as beef and mutton are preferred
Mauritania	24 000	6% (1.2 million)	• Camels are used as a source of meat but the live animal is considered more important to the economy and culture
Saudi Arabia	12 000	>1% (425 000)	• Preferred meats in order of preference include lamb, camel and beef • Consumed 150 000 camels in 1995 • Camel products sold include mince, canned meat and sausages • In 1994, camels for slaughter sold for $A520 and milking camels for $A1 038–$A3 461 • Main consumers are desert bedouins (nomads), but they are moving to urban areas • Safeway is selling more traditional foods such as camel for the bedouin market and to attract new consumers

Table 1 World production of camel meat, 1997 (ctd)

Country	Camel meat production (tonnes/year)	Proportion of total camel population	Comments
Egypt	2 300	>1% (135 000)	• There is limited demand and a preference for beef, chicken then fish • 60% of Egypt's camel meat is imported from Sudan • Imports were formerly also obtained from Djibouti but trade ceased due to disease • Sudanese camels sold in Egypt for $A325–$A900 • Camels for meat are sold in Cairo • Export trade is mainly from November to April
Jordan	500	>1% (18 000)	• Lamb is preferred over all other meats • There are no imports of camels • Camels are raised by desert bedouins largely for transport • Bedouins consume camel milk and meat but only when there is a shortage of lamb • Bedouins are migrating to urban areas and camel meat consumption is declining
Mongolia	unknown	2% (350 000)	• Camels are used for transport across arid areas and also for meat, milk and hides • Slaughtering caused a decline in numbers as animals were killed to fulfil the meat quota. In 1994 the government placed a ban on killing camels
China	unknown	2% (350 000)	• Consumption of camel meat is limited and confined mainly to Shanghai and Beijing • Camels' economic importance is in their working ability and hide production, not for their milk or meat
South Africa	unknown	na	• Although South Africans are game meat eaters camel meat consumption is insignificant • There are very few camels and they are valued alive rather than for meat • There is no importation of live camels or camel meat due to the risk of foot and mouth disease
Europe	unknown	na	• Camel meat is available in small quantities in some parts • Importers of exotic meats indicated that there is no market at present for camel meat. Some suggested it could be a substitute for horse meat in continental Europe

na: information not available
Source: Devlin, 1997; FAOSTAT, 1999

3—Australian supply

- CACIA began slaughtering camels in 1995 and is currently the only group doing so in Australia. The camels are transported from Alice Springs to the domestic-licensed Strathalbyn abattoir in South Australia and the meat is boned out by Strath Meats. CACIA has not been able to gain access to an export-accredited abattoir.
- Camels were initially slaughtered at the domestic-licensed Wamboden abattoir (Alice Springs) by Centapackit (wholesalers) in the mid 1980s through to the mid 1990s.
- Camels have been slaughtered at various abattoirs in the past including Peterborough (South Australia), Bohle (Townsville) and the export licensed horse abattoir Meramist (Caboolture, Qld.).
- All camels currently slaughtered are sourced from cattle stations in the Northern Territory. Table 2 presents the total slaughter numbers.

Table 2 Number of camels slaughtered in Australia

Year	Number
*1995	254
1996	347
1997	295
1998	324

*Includes CACIA and Centapackit figures

Source: Seidel, 1999

4—Australian market

Market size and growth

- In 1997 the market size for game meat in Australia was 2666 tonnes with a wholesale value of about $21 million (based on an average of $8/kg). Between 1995 and 1997 this market grew by 68%. Kangaroo is by far the major game meat in Australia accounting for 50% of the total market in 1997 (Table 3).
- Camel meat represented only 2% of the game meat market in 1997: 42 tonnes with wholesale value of around $210 000 (based $5/kg). In 1998 volume rose by 16% to 49 tonnes.

Table 3 Domestic market size for game meats and birds for human consumption, 1995–97 (tonnes)

Game	**1995**	**1996**	**1997**
Kangaroo	479	822	1 339
Game birds[1]	526	594	608
Venison[2]	474	336	329
Crocodile[3]	186	201	196
Emu	46	70	68
Wallaby	67	70	58
Camel	**35**	**48**	**42**
Buffalo	25	24	16
Ostrich	2	2	10
Total	**1 840**	**2 167**	**2 666**

[1] includes-quail, spatchcock, squab and duck
[2] includes domestic production and NZ imports
[3] includes domestic production and PNG imports

Sources: Seidel, 1999; Kelly, 1998; Lemcke, 1998; Cook, 1998; English, 1999; Lean, 1998; Gelati, 1998; Henderson, 1999; Environment Australia, 1999; Tume, 1999; Lyall, 1999

Sales volumes of camel meat

- Wholesalers in different states have ordering patterns ranging from weekly to every 3 to 4 months. The approximate quantities indicated in Table 4 have been adjusted to average weekly volumes for comparative purposes.

Table 4 Camel meat sold by state wholesalers and manufacturers, 1998

Company and state	**kg/week**
Manufacturer (SA)	45
Manufacturer (SA)	60–70
Manufacturer (NT)	30–40
Restaurants (Wyuna sells to directly)	unknown
Wholesaler (WA)	10–13
Wholesaler (NSW)	50–70
Wholesaler (VIC)	20–40
Approximate annual total sales	**11 180–14 456 kg**

Sources: Wagner, 1998; Cooper, 1998; Gelati, 1998; Weckert, 1998; Coombes, 1998; Burgess, 1997; Lang, 1999

- Small volumes are supplied on an *ad hoc* basis from time to time to small wholesalers in some states and directly to restaurants. These amounts are unknown, but would be accounted for in the total volume produced by CACIA (Table 3). The volumes documented above also include significant amounts of sausage trim which is of low value.

- SA Meats (Woolworths) supplies supermarkets in South Australia, the Northern Territory, Victoria (Mildura) and New South Wales (Broken Hill). They have the following total annual sales:

Table 5 SA Meat (Woolworths) sale of camel meat cuts, 1998

Cut	**Quantity (kg)**
Rump	573
Striploin	554
Silverside	555
Round/knuckle	574
Topside	104
Sausage trim	27
Scotch fillet/cube roll	70
Fillet/tenderloin	48
Chuck	17
Bolar blade	35
Total	**2 557**

Source: Wyuna Meats, 1998

- A survey of butchers and restaurants found that the incidence level of those selling game meats was 6% and 1–2% respectively (CM Research, 1999).
- Table 6 shows that butchers tend to carry kangaroo, venison and game birds while restaurants are more likely to sell game birds, kangaroo, emu and crocodile (CM Research, 1999).
- 10% of butchers who sell game meats have at some stage sold or occasionally sell camel meat (CM Research, 1999)
- 28% of restaurants that sell game meat have at some stage sold camel meat while only 18% occasionally sell camel meat (CM Research, 1999).
- Butchers interested in using camel meat in the future are mainly in NSW/ACT (45%), Queensland (44%) and South Australia (15%). Interested restaurants in camel are predominantly in Queensland (17%) and the Northern Territory (14%).

Table 6 Types of game meat used by butchers & restaurants (%)

Game	Butchers	Restaurants
Kangaroo/wallaby	90	78
Venison	54	42
Rabbit	51	40
Game birds such as pheasant, quail, squab	50	80
Crocodile	45	52
Emu	35	58
Ostrich	21	16
Buffalo	18	44
Goat	16	14
Camel	**10**	**18**
Possum	4	6

*Sample: 72 butchers & 50 restaurants who either sell or serve game, multiple responses
Source: CM Research, 1999

Table 7 Interest in using game meats (%)

Game	Butchers	Restaurants
Buffalo	32	12
Goat	27	14
Camel	**26**	**8**
Venison	22	14
Emu	21	4
Crocodile	20	4
Game birds such as pheasant, quail, squab	16	6
Rabbit	14	12
Ostrich	14	16
Possum	12	4
Kangaroo/wallaby	7	6
None of the above	20	38

*Sample: 72 butchers & 50 restaurants who either sell or serve game, multiple responses
Source: CM Research, 1999

- Purchases of camel meat were negligible during the 12 months to March 1999 (Table 8).

Table 8 Camel meat purchased in past 12 months (%)

Quantity	Butchers (n=8*)	Restaurants (n=14*)
Less than 10 kg	86	50
11–25 kg	-	29
51–100 kg	-	14
101–500 kg	7	-
None	7	7

*sample size of 8 and 14 respectively
Source: CM Research, 1999

- Purchase intention indicates a strengthening of demand (Table 9).

Table 9 Likely purchase of camel meat in next 12 months (%)

Quantity	Butchers (n=72*)	Restaurants (n=50*)
Less than 10 kg	33	42
11–25 kg	7	8
26–50 kg	2	-
51–100 kg	1	4
More than 500 kg	-	2
Don’t know	8	6
None	49	38

*sample size 72 and 50 respectively
Source: CM Research, 1999

- Table 10 outlines the quantity of camel meat that respondents in Melbourne said they had used, as well as how much they thought they might use if the quality, supply and price were satisfactory. It also presents the quantities of other game meats sold by some butchers and chefs.

Table 10 Trade of camel meat – Melbourne, November to December 1997

Respondent	Status	Meat used	Currently or in the past (kg)	Potential (kg)
Butcher/wholesaler	past	halal camel trim	420 kg (once)	300–500 kg per fortnight
Butcher	current	camel porterhouse kangaroo	1 kg per week 4–6 kg per week	
	past	camel sausages	200 kg (once)	300–400 kg per week
		venison	1 kg per week	
Chef	current	camel—sausages	6–8 kg per week	
	past	camel—scotch fillet (Ayers Rock)	20–30 kg week	10 kg per week
	past	kangaroo	80 kg per week	
	potential	camel		10–15 kg per week
Wholesaler	past	halal camel meat	12–14 kg (in 4 months)	
	past	halal camel—mixed cuts	400 kg (once)	

Source: Warfield & Leech, 1998

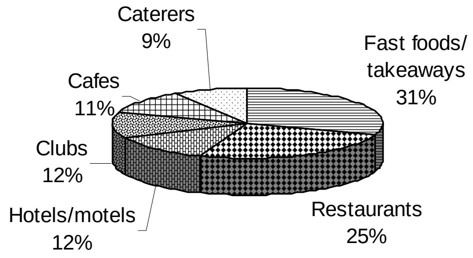
Market segments

Foodservice

Size and composition

- The foodservice sector is made up of two areas: the commercial and institutional sectors. The commercial sector is of more interest to the camel industry as there is very limited penetration of game meats into the institutional sector.
- The commercial sector includes fast foods/takeaways, restaurants, hotels/motels, clubs, cafés and caterers (Figure 1). The institutional sector includes schools, nursing homes/retirement villages, staff canteens, hospitals, tertiary institutions and military installations/prisons.
- The market share of the foodservice sector is growing at the expense of the retail sector. In 1996 Australians ate 4 billion meals away from home, representing 23% of all meals eaten, compared with 2.5 billion meals in 1982. The sector was expected to growth further by 1998 to 4.3 billion meals (AMLC, 1996).
- It is estimated that there are 54300 commercial sector outlets in Australia. The sectors of most interest to the camel industry include restaurants 13700, hotels/motels 6600 and cafes 6000 outlets. Just under half (6576 outlets) of the restaurant described their cuisine as either modern Australian (36%) or European cuisine (12%), which represents a significant segment for the camel industry to target (AMLC, 1996). *Source: AMLC, 1996*

Figure 1 Breakdown of foodservice outlets in Australia 1996—commercial sector



Source: AMLC, 1996

Trends

- A number of developments and trends in the foodservice sector are relevant to the camel industry as they may well influence the way in which the product is positioned, the types of cuts offered and the promotional material developed (McKinna, 1997a&b).
- There is growth in café-style restaurants and a decline in fine dining. Consumers are seeking faster, casual, inexpensive dining.

  Implication: target the café market with cheaper, ready-to-use cuts and value-added products. Develop recipes focusing on fast, cheap and simple dishes for this sector.
- Demand is growing for less complex dishes: consumers want to taste ingredients. Meat is becoming less of a centrepiece. There is a trend towards more wet dishes such as stews, curries, stir fries and satays and fewer roasts and grills.

  Implication: development of recipes should take this into account using cheaper cuts for wet dishes. The trend towards wet dishes represents a good opportunity for camel given its association with the Middle East.
- New menus tend to be developed seasonally, with specials added daily or weekly. Higher quality restaurants tend to have 10 main meals including 3 seafood, 5 meat, 1 new meat and 1 vegetarian.

  Implication: the camel industry should develop recipes related to seasons and target restaurants and cafés with recipes designed to be placed on the specials menu.
- Chefs are buying more meat portion-controlled and individually cryovac packaged.

  Implication: the camel industry should explore the opportunities to supply camel meat in this format rather than just as whole primals.
- Branded meats are becoming increasingly popular within the foodservice sector and diners are interested in the origin of the food and the production system, e.g. King Island, South Gippsland, organic, grass-fed.

  Implication: the camel industry should consider developing a brand if quality assurance (QA) systems are in place and consistent tenderness can be delivered.
- Consumers are seeking lighter, healthier foods particularly at lunch.

  Implication: recipe development should take this trend into account.
- The survey by McKinna found that 100% of respondents from the foodservice sector rated quality, consistency, tenderness and taste/flavour as very important factors that influenced them when designing a menu.

  Implication: prior to any promotional activities the camel industry needs to develop and implement strict quality assurance programs to guarantee a consistent product that meets buyers' expectations of tenderness, taste and leanness. This has been one of the major weaknesses of game meat industries in Australia.
- Traditional meat industries perceive new meats as a small but growing competitor, as they are no longer confined to up-market establishments (which are losing market share to café/casual dining) but are moving into more down-market outlets. Kangaroo and venison are considered by

the foodservice sector to be reaching mainstream status, while other game meats are still considered fads/novelties that consumers try once. However chefs are still critical of new meats because of unreliable supply, inconsistent quality and inadequate knowledge by suppliers on how to prepare, cook and serve the product.

Implication: traditional meat industries are viewing new meats as competitors and will develop strategies to counter their impact. The camel industry should also look at adopting the strategies used by kangaroo and venison to reach the stage where restaurants consider they are reaching mainstream status. In addition camel needs to avoid strategies, that might lead to it becoming a fad/novelty confined only to the tourist or 'one off' experience.

Source: McKinna, D 1997a&b (dot points)

Characteristics of establishments selling game meats

- Restaurants selling game meats are predominantly located in NSW/ACT and Qld. They describe their style of restaurant as 'fine dining' or 'family' and their cuisine as modern Australian, Continental/European/French. The clientele of restaurants serving game meats tend to be local residents and domestic and international tourists (Table 11-14).

Table 11 Location of restaurants serving game meats (%)

NSW/ACT	**26**
Vic	16
Qld	**36**
SA/NT	18
WA	2
Tas.	2

Source: CM Research, 1999

Table 12 Style of restaurant serving game (%)

Bistro	4
Café	6
Fine dining	**50**
Family restaurant	**28**
Buffet/smorgasbord	8
Pub or club	-
Other	4

Source: CM Research, 1999

Table 13 Type of dining of restaurants serving game (%)*

Modern Australian	**58**
Continental/European/French	14
Greek	2
Mediterranean	6
Chinese / Vietnamese	4
Other Asian	2
Other	14

*Total does not equal 100% due to rounding
Source: CM Research, 1999

- Other labels used by restaurants to describe their cuisine included European Australian (specialising in seafood), regional, modern international, international cuisine (3 restaurants) and BBQ/grill.

Table 14 Clientele—restaurants serving game (%)*

Domestic tourists	**70**
International tourists	**64**
Local residents	**78**
Specific ethnic groups	20
Some other special interest group	20

*Multiple responses
Source: CM Research, 1999

Perceptions/attitudes towards camel meat

- Ayers Rock resort has seven eateries—Kuniya, Winkiku, Rockpool White Gums, Gecko's, Pioneer Kitchen, Bough House and Outback Pioneer BBQ. They range from fine dining to 'cook-your-own' BBQ packs.
- The Outback Pioneer BBQ packs feature a range of game meat products including kangaroo skewers, crocodile kebabs and emu sausages as well as the more traditional chicken, beef and barramundi.
- According to the White Gums sous-chef, he used only small quantities of camel meat; he preferred kangaroo as sometimes camel was tough and customers tended to associate kangaroo with Australia rather than camel. He said he would not put camel steak on the menu as it would be too stringy (Shoerin, 1999)
- The survey conducted by CM Research found that 14 restaurants out of 50 had sold camel meat. The main reasons for doing so included:
  - popular with tourists
  - variety on the menu
  - novelty
  - bush tucker and bush foods for tourists
  - special function—e.g. Australia Day, tourism awards
  - keep customers interested

Table 15 Reasons for not using more camel meat—restaurants (%)*

Lack of interest	**52**
Didn't know it was available	16
Customer resistance/negative attitude towards game meat	10
Game meat isn't available/have to go elsewhere to purchase	6
Expensive	10

*Totals do not equal 100% as open-ended question and rounding
Source: CM Research, 1999

Table 16 Reasons for low customer demand of camel meat—restaurants (%)

No advertising/awareness of this product generally	**64**
Customer resistance/negative attitude towards game meat	14
Little commercial awareness of the product	22
Little consumer awareness of product	8
Game meat isn't available	-
Expensive	4
Don't know where to purchase camel meat	8

*Totals do not equal 100% as open-ended question
Source: CM Research, 1999

- Restaurants envisage a range of uses for camel meat, with curries and casseroles suggested, as well as grills or barbecues (Table 17).
- Potential users of camel meat saw it being used either as an entrée or in a mixed grill with other game meats. A chef suggested that it should be offered on a platter free of charge to customers to encourage trial. Chefs also perceived that the season would also affect the way in which they would use the meat. For instance one chef suggested that if camel meat was available only in winter cuts suited to braises and pies should be promoted, while in summer cuts suited to char-grills and salads should be promoted (Warfield & Leech, 1998).

Table 17 Suggested uses for camel meat—restaurants (%)*

Other wet dishes, e.g. casseroles	**54**
Grills	**52**
Barbecues	**46**
Curries	**42**
Roasts	22
Stir fries	20
Other	8
Don't know	8

*Multiple responses
Source: CM Research, 1999

Target segments

- Within the foodservice sector the segments that appear to offer the greatest opportunities are 5 star hotels and fine dining restaurants followed by 3–4 star hotels and casual dining restaurants/cafés, located in South Australia and the Northern Territory and also perhaps New South Wales and Queensland. As chefs associate camel meat with tourism, the focus should be on improving the distribution and use of the meat in tourism centres in the Northern Territory.

Retail—butchers

Size and composition

- In 1998 there were 7073 retail butcher stores in Australia (National Meat Association, 1999).
- There are 70 certified halal butchers in Australia a number of other butchers sell some halal meat but not exclusively and therefore are not certified.
- It is reported that 60–70% of Muslims purchase their meat through supermarkets because of the higher quality and lower prices. Only devout Muslims are reported to buy meat from halal butcher shops (Lotfi, 1999).

Characteristics of establishments selling game meat

- Metropolitan butchers are more likely to sell game meat in all states except for NSW/ACT. Butchers in South Australia and Queensland were found to be more likely to sell game meats, while those in New South Wales and Victoria are less likely to do so (CM Research, 1999).
- Table 18 shows that more butchers in Victoria (29%) and South Australia (23%) sold camel than any other state. For butchers, venison was more popular in Victoria (79%) than in other states, goat was more popular in SA (31%) and WA (33%), kangaroo was less popular in Queensland (63%) and ostrich was more popular in Queensland (53%).
- Table 19 shows that butchers carrying game meats tend not to be halal butchers and to carry only some or no halal meat. Most butchers selling game described themselves as traditional or gourmet butchers (Table 20).

Table 18 Location of butchers selling game meats (%)*

	NSW/ACT (n=20)	**Vic.** (n=14)	**Qld** (n=16)	**SA** (n=13)	**WA** (n=6)	**Tas.** (n=3)
Venison	55	79	50	38	17	33
Goat	10	14	19%	31	33	-
Kangaroo/wallaby	95	100	63	92	100	100
Possum	-	-	6	15	17	-
Crocodile	50	50	50	15	50	-
Camel	**-**	**29**	**6**	**23**	**-**	**-**
Buffalo	10	36	13	8	33	-
Emu	35	50	19	15	50	33
Ostrich	15	21	50	8	-	-
Game birds	45	64	50	38	67	-
Rabbits	65	50	38	15	67	33

*Multiple responses
Source: CM Research, 1999

Table 19 Halal meat carried by butchers selling game (%)

All/nearly all halal meat	1
Some halal meat	11
No halal meat	**88**

Source: CM Research, 1999

Table 20 Style of butchers selling game meats (%)*

Halal butcher	-
Gourmet butcher	**41**
Game meat butcher	1
Traditional butcher	**59**

*Total doesn't equal 100% due to rounding
Source: CM Research, 1999

Table 21 Clientele—butchers selling game meats (%)*

Domestic tourists	**25**
International tourists	14
Local residents	**94**
Specific ethnic groups	9
Some other special interest group	12

*Multiple responses
Source: CM Research, 1999

- Most butchers selling game meat cater primarily for local residents, although some also mentioned catering for tourists and ethnic or special interest groups.

Perceptions/attitudes towards camel meat

- For butchers, the main reasons for not using camel meat are a general lack of interest or awareness that the product is available; a view that game meat is not easy to obtain; and customer resistance to game meat in general (Table 22 and 23).

Table 22 Reasons for not using more camel meat—butchers (%)*

Lack of interest	**63**
Didn't know it was available	20
Customer resistance/negative attitude towards game meat	14
Game meat isn't available/have to go elsewhere to purchase	26
Expensive	4

*Totals do not equal 100% as open-ended question and rounding
Source: CM Research, 1999

Table 23 Reasons for low customer demand for camel meat—butchers (%)

No advertising/awareness of this product generally	**39**
Customer resistance/negative attitude towards game meat	**24**
Little commercial awareness of the product	12
Little consumer awareness of product	12
Game meat isn't available	13
Expensive	8
Don't know where to purchase camel meat	8

*Totals do not equal 100% as open-ended question and rounding
Source: CM Research, 1999

Target segments

- The target segment is traditional and gourmet butchers in the major capital cities (particularly Melbourne, Sydney, Brisbane and Adelaide) located in high socioeconomic suburbs. The camel industry is at present represented in this segment in Melbourne; the meat and poultry department in the Daimaru shopping centre stocks camel meat but sells only 1 kg per week (Warfield & Leech, 1998).
- Another target market for camel meat is halal butchers. Halal butchers in both Brisbane and Melbourne sold sample quantities of halal camel meat in the past. A mixture of cuts were sold including diced camel and sucuk (Turkish smallgood) (Warfield & Leech, 1998).

Retail—supermarkets

Size and composition

- As indicated in Figure 2, Woolworths and Coles are in the top 3 in terms of market share in all states.
- Metro a Woolworths venture, Let's Eat and Express (Coles ventures) have been developed to counter supermarkets' loss of market share to the foodservice sector. The emphasis of these stores, which are located in suburban areas of major cities, is on home meal replacement (HMR) foods.
- Woolworths has two Metro stores—one in Brisbane (Ascot) and one in Sydney. About two thirds of the trading area is devoted to meal solutions. A further six Metro stores are planned in Brisbane the Gold Coast and the Sunshine Coast. Woolworths is piloting the meal solutions category in 10 stores (Retail World, 1998).
- Service stations and 7-Eleven stores are also moving into the home meal replacement market. Caltex is trialling a range of Chef Express products in Ampol and Caltex ShopStop convenience stores in Sydney. Suppliers of the home meal replacement category to Caltex include Marcel Foods, Mrs Crocket's Kitchen, Heinz, Latina, San Remo, Harvest Fresh, Gourmet Choice and WOK Fresh (Retail World, 1998).
- New concept stores opened by Coles include Coles Donvale located at Doncaster in Victoria and Coles on Broadway in Sydney. These stores are focusing on chilled meals and are also providing a wide range of up-market products. In a deal with Mobil Coles will open a store called Coles Fast and Fresh at Watirna South in Melbourne. Coles is also planning to open 2 new Coles Express stores—one in the Queen Street Mall in Brisbane and the other in Sydney at Wynyard Station (Retail World, 1998).
- The fresh chilled meals sold by the Metro, Let's Eat, Express and traditional supermarkets are been prepared by both large and small companies. Qantas Flight Catering is manufacturing the meals sold under the Woolworths brand 'Chef's plate' and Marcel's Foods is producing the Coles brand 'Kitchen Creation'. Express Cuisine is producing fresh chilled meals for Woolworths in South Australia and Goodman Fielder Wattie is producing a range of meals focused on Indian and Asian cuisine (Retail World, 1998).

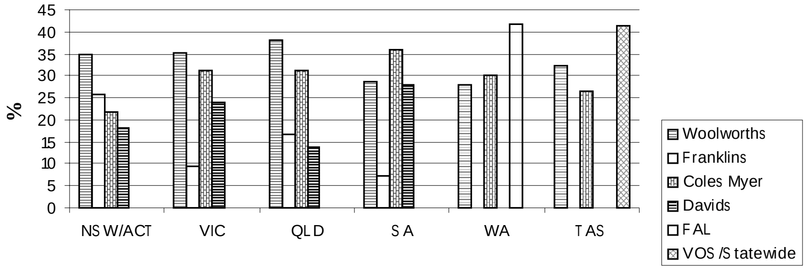


Figure 2 Market share of supermarket chains by state, 1998

Source: Retail World, 1998

Characteristics of establishments selling game meats

- The game meat sold by Woolworths in South Australia and the Northern Territory was valued at $1.25 million. For the period April to September 1998, Franklins sold game meat worth $50000 in New South Wales and $15000 in Queensland. During the Bush Week promotion by Franklins' Big Fresh stores, game meat sales peaked at $5000 to $6000 (Blamey, 1999 & Leighton, 1999).
- Stores that sold game meats in all states tended to be in high socioeconomic areas or tourism locations.
- In South Australia the independents and Coles are revisiting game meats as a result of Woolworths' extension of its range (Joyce, 1999).
- Franklins in Queensland has a sole distributor of all game meats and birds due to the low volumes. Overseas Game Meat Exports (based at Nerang) supplies all game meats and birds sold by Franklins stores in Queensland. They are sold at eight Big Fresh stores and—in small amounts—at two Fresh stores at Mermaid Waters and Noosaville (Blamey, 1999).
- Franklins conducts monthly promotions of various game meats in its Big Fresh stores (26 nationwide). It perceives game meats to fit with Big Fresh's positioning in terms of range and theatre (Leighton, 1999).
- The camel industry distributes value-added products via Wild Oz, The Tall Australian and Cottage Meats through selected Woolworths and Coles stores. SA Meats purchases camel meat primals from Wyuna Meats for Woolworths stores in South Australia, the Northern Territory and at Mildura and Broken Hill.
- Camel tenderloin was sold at Let's Eat (new concept Coles supermarket focused on ready-to-eat meals and up-market products) at Prahran in Melbourne (Retail World, 1998), but because of poor sales was discontinued (Appendix 2, Table A2 3).

Use of game and camel meat

- A Woolworths representative in Alice Springs said they sell 80–100 kg of kangaroo fillets per week, 20 kg of camel meat and 12 kg of emu, venison and ostrich sausages (Woolworths, 1998).
- The same representative said camel meat sometimes sold well and other times didn't. He received camel meat chilled, vacuum-packed and with a shelf life of 4 to 5 weeks (Woolworths, 1998).
- Store audits conducted in March 1998 and 1999 indicated poor representation of camel meat in all stores except Woolworths. There also appeared to be some out-of-stock problems and problems with the presentation of some camel meat products (see Appendix 2).

Perceptions/attitudes towards game

- In Queensland, cooperatives and processors of game meats have obtained a poor reputation for failing to follow up on their initial presentations to merchandise managers. They are also reported to be poorly prepared and resourced to meet even the basic packaging and promotional requirements of supermarkets.

- Most meat merchandise managers report that game meats have poor turnover and very limited consumer demand. As a result, supermarkets are seeking extended shelf life through vacuum packaging or modified atmosphere packaging (MAP), small volumes and low margins (to suppliers) to account for the high wastage and markdowns. Apart from Franklins and Woolworths (Northern Territory/South Australia), there was very little interest or enthusiasm for any game meats. Most merchandise managers were of the opinion that there is little consumer interest in these types of meats at a retail level. The foodservice sector was considered a more viable sector for game meats and it was thought they needed to establish a presence in this area before venturing into the supermarket sector.
- Issues identified by merchandise managers for game meats included:
  - insufficient shelf life to deal with slow turnover;
  - inconsistent supply;
  - unappealing packaging;
  - dark colour of meat unappealing to customers;
  - opposition by animal liberation groups;
  - transport times to regional/tourism areas resulting in reduced in-store shelf life;
  - a preference for fresh rather than frozen game meats;
  - consumers are scared to taste game meats and also don't know how to cook or prepare them.
- There is growing interest in MAP packaging by both Coles and Woolworths. This may be a requirement if camel is to be introduced into the HMR category. There were mixed opinions about the opportunities in this category: some states (Woolworths in Western Australia and South Australia, Coles in Queensland) considered that there may be opportunities in the long term while others did not see future in the category for any game meats (Kingdon, 1999 & Gascoigne, 1999).
- Price was seen to be an important issue for game meats—Franklins in Queensland reported that it sold small packs to keep the price to $5 to $6 (Blamey, 1999).
- The preferred promotional activities for game meats through supermarkets are on-pack recipes and in-store tastings and demonstrations.

Perceptions/attitudes towards camel meat

- According to Woolworth's meat manager in Alice Springs, problems he has had with camel meat included freshness of stock (this was attributed to problems with SA Meats, not the camel industry) and inability to get the cuts he wanted. He said sales of camel meat had stayed the same and the price was lower than that of most other game meats. The main customers for camel meat were tourists, not local residents (Safwell, 1999).
- Coles' meat manager in Alice Springs said all game meat went through the South Austalian merchandise manager; hygiene was the reason the store did not buy locally. He reported selling some BBQ packs but not a lot; however demand increased during the tourist season. Product safety appeared to be a major issue for Coles (Redman, 1999).

Target segments

- Opportunities in the supermarket sector appear to be mainly in South Australia, the Northern Territory and Western Australia. There may also be possible opportunities in Franklins' Big Fresh stores, the newly created HMR category and new concept supermarkets (Metro, Let's Eat, Express, Coles Donvale and Coles on Broadway).
- The camel industry should target Woolworths, Coles and Foodland supermarkets in South Australia and supermarkets located in up-market and tourist areas (targeting backpackers, local residents and people staying in self-cooking accommodation) of the Northern Territory and Western Australia (Dewsons, Advantage, Rules, Coles, Woolworths). Franklins' Big Fresh stores should also be targeted.
- The camel industry should also look at how (or if) it can position itself to appeal to companies producing fresh chilled meals for the new HMR sector. The target market for chilled HMR has been identified as 'young, affluent singles and to a lesser extent older empty-nesters' who may be more adventurous in their food selection (McKinna, 1997b). The limiting factors for camel meat include cost (as these meals are expensive, suppliers would be seeking to keep costs low), lack of

interest by merchandise managers in all game meats in some states (particularly Queensland), and camel's 'strangeness', which may restrict it in this market segment.

Consumer segments

Characteristics of potential target market

- As indicated in Table 24, the current and potential market for camel meat was found to be predominantly territorians, Melbourne Muslims and visitors to Alice Springs.

Table 24 Trial and likelihood of purchasing camel meat by consumer segment (%)

Segments	Previous trial of camel meat	Likely to buy to cook at home	Likely to order at restaurant
Territorians	30	27	25
Visitors to Alice Springs	12	na	45
Melbourne Muslims	16	48	44
Melbourne general public	1	23	34

na: information not available
Source: Quong & McGregor, 1995b

- As indicated in Table 25, butchers perceived the target market for camel meat to be local residents while restaurants saw most interest from international tourists.
- Ethnic or special interest groups identified by restaurants and butchers as being likely buyers of camel included Arabs, corporate customers (wanting to try something different but not paying for it), local residents who have travelled to the Northern Territory, Lebanese, Greeks other Europeans and Mainland Chinese tourists.

Table 25 Customer groups likely to be interested in camel meat (%)*

Segments	Butchers	Restaurants
Local residents	**46**	12
International tourists	25	**76**
Domestic tourists	16	28
Restaurants	13	-
Arabs	13	2
Specific ethnic groups (other)	20	8
Some other special interest group	9	10
Lebanese	4	-
None of the above	5	4

*Multiple responses
Source: CM Research, 1999

Perceptions/attitudes towards camel meat

- Camel meat served to participants of focus groups in Alice Springs and Melbourne was described as 'chewy and tough' and no different from beef [in terms of flavour] (Quong & McGregor, 1995a). Consistently tender camel meat needs to be available before any promotional or distribution strategies are undertaken. Also a meaningful point of differentiation from beef and from other game meats needs to be developed to make camel meat competitive and encourage repeat consumption.
- Consumers stated that when they purchased camel meat it was important that it be visibly lean (Quong & McGregor, 1995a). A store audit at Woolworths in Alice Springs found marbled and poorly presented camel porterhouse heavily discounted to encourage sale prior to expiry of its use-by date (see Appendix 2, Table A2 1).
- An issue raised by consumers that needs to be addressed was their tendency to associate camel meat with the actual animal, which gave rise to hygiene and disease concerns (Quong & McGregor, 1995a). This problem could be overcome by renaming camel meat and avoiding the use of a camel's image on all promotion and communication material.

Target markets

- Potential target markets identified for camel meat include:
  - international and domestic tourists visiting the Northern Territory, through restaurants (fine dining), cafés, hotels (3–4 and 5 star) and supermarkets;
  - local residents in tourism areas of the Northern Territory for their own use and to serve to visitors, through supermarkets and restaurants (fine dining), cafés and hotels (3–4 and 5 star);
  - Muslims (when halal-certified camel meat is available) from Middle Eastern countries and Asia, through halal butchers in all capital cities (particularly in New South Wales, Victoria and Western Australia).
  - Consumers of other game meats, in restaurants (fine dining), cafés and hotels (3–4 and 5 star) in South Australia, the Northern Territory and Queensland; traditional and gourmet butcher shops in Melbourne, Sydney, Brisbane and Adelaide; and new concept supermarkets in metropolitan centres and Franklins' Big Fresh stores.

Ethnic groups

Market size and characteristics

- CACIA has identified Muslims and Chinese as potential target markets in Australia.
- The 1996 Census identified 204405 followers of Islam in Australia, about 1% of the population. As indicated in Table 26 most Muslims live in New South Wales, Victoria and Western Australia.
- Research conducted with wholesalers and butchers in Melbourne and Brisbane found that Muslims from Saudi Arabia, Iran, Iraq, Indonesia, Malaysia, Pakistan, India and Turkey were considered the target market for camel meat. However this research also found that traditional game and meat wholesalers do not have many, if any, Muslim clients and therefore do not have good access to this segment.
- Chinese, Italians and Greeks were not considered primary target markets for camel meat by the trade in Brisbane and Melbourne. Other meats such as venison, crocodile, chicken and duck were considered preferred by Asian consumers (Warfield & Leech, 1998).
- A wholesaler in Melbourne recommended targeting Brunswick, Broadmeadows and some western suburbs, which have high Turkish populations (Warfield & Leech, 1998).

Table 26 Number of people in Australia of Islamic religion, 1996

State/territory	Number	Percentage
New South Wales	105 964	52
Victoria	67 099	33
Western Australia	12 583	6
Queensland	9 427	5
South Australia	4 817	2
Australian Capital Territory	2 946	1
Tasmania	805	0
Northern Territory	764	0
Total	204 405	100

*Note: This Census question is not compulsory; 1.5 million people did not state their religion.
Source: ABS, 1996

Tourists

Market size and characteristics

- The tourist market is made up of two groups—international and domestic. In 1996, 3.8 million international tourists visited Australia. In 1995–96, 63 million intrastate and interstate domestic trips were made (Bureau of Tourism Research, 1996 and 1997).
- Initially, CACIA should consider targeting tourists visiting the Northern Territory, the area with which camels are associated. There may also be some opportunities in Western Australia, Queensland and country areas in New South Wales and Victoria.
- Interstate visitors to the Northern Territory are mainly from New South Wales, Victoria and Western Australia (Bureau of Tourism Research, 1997).
- Interstate visitors stay mainly at hotels and motels with facilities and to a lesser extent with, friends or relatives. In the Northern Territory a higher proportion of interstate visitors stay in caravan parks and camping facilities (Bureau of Tourism Research, 1997). These data have implications for the distribution of camel meat in these areas. To reach most interstate tourists CACIA needs distribution in restaurants (hotels, motels, casual and fine dining), and in supermarkets in tourism areas for the self-catering market.
- The five leading sources of international visitors to Australia are Japan, New Zealand, the United Kingdom, the United States and 'other Europe' (Bureau of Tourism Research, 1996).
- To reach overseas tourists CACIA needs to consider making camel meat available in hotels, motels and to a lesser extent backpacker hotels/hostels (particularly for visitors from the United Kingdom and other European countries) and resorts. A significant number of international tourists are also staying with family and relatives (Bureau of Tourism Research, 1996); to reach these visitors camel meat should be available in supermarkets in tourism areas. Products that would suit

this market, include the ones that Cottage Meat is currently manufacturing and distributing through Coles and Woolworths.

- Tourists who mainly visit the Northern Territory are predominantly from other Europe, Germany, the United Kingdom, Canada, the United States and Japan (Bureau of Tourism Research, 1996).

Competitors

Table 27 Camel and other game meats—summary of competitive position

Competitive factor	Camel	Venison	Crocodile	Kangaroo	Ostrich	Emu	Buffalo	Goat
Low production costs								
Low processing costs								
Availability of & access to stock								
Access to processing facilities								
Vertical integration								
Early entrant to category								
Strategic direction/goals								
Product quality								
Financial resources								
Business skills								
Technical skills								
Product quality reputation								
Product characteristics/differentiation								
Brand recognition								
Customer orientation/market intelligence								
Customer awareness/knowledge								
Segmentation/focus								
Distribution								
Retailer/distributor relationship								
Promotional skills								
Sales force								
Customer confidence								
Newness/innovation								
Pricing								
Image/positioning								
Customer service/support								
Size/loyalty of customer base								
Market share								?
Growth of segments served								
Diversity of segments								

5 4 3 2 1

Rating scale: 5 highly competitive in game meat segment; 1 uncompetitive in game meat segment

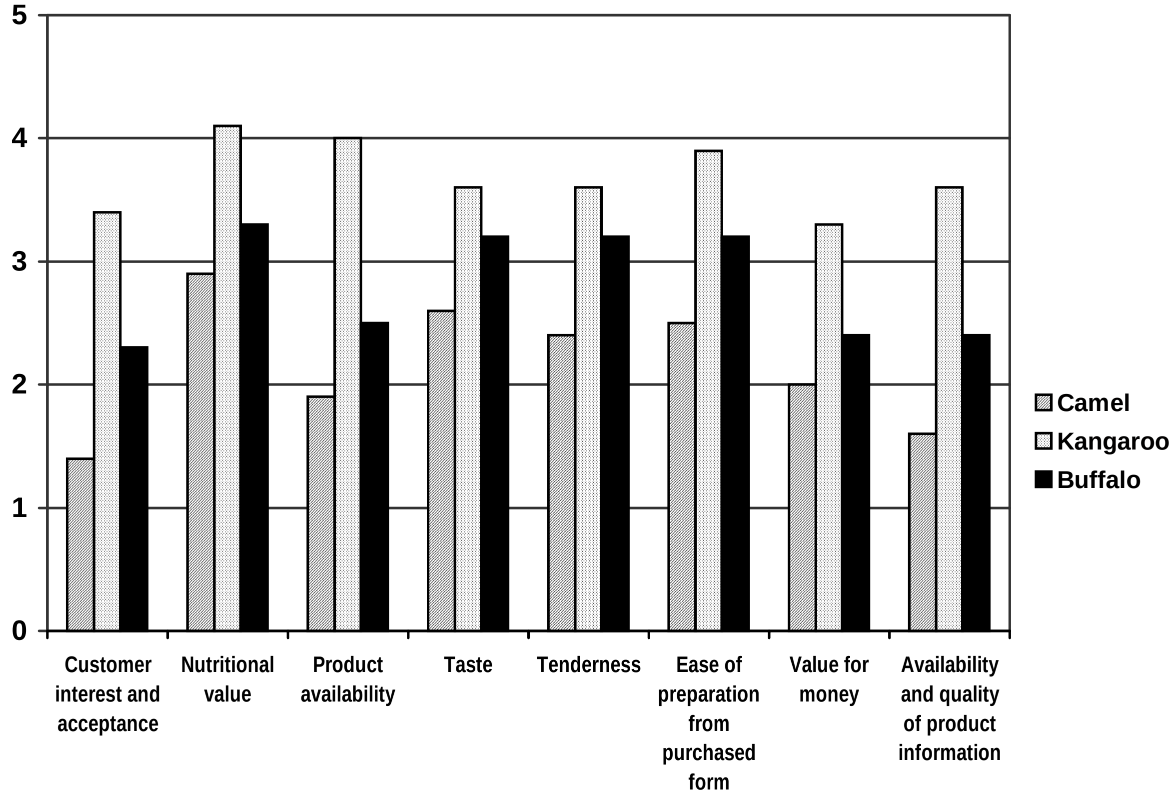
Source: Appendix 8

24

Competitiveness in relation to other game meats

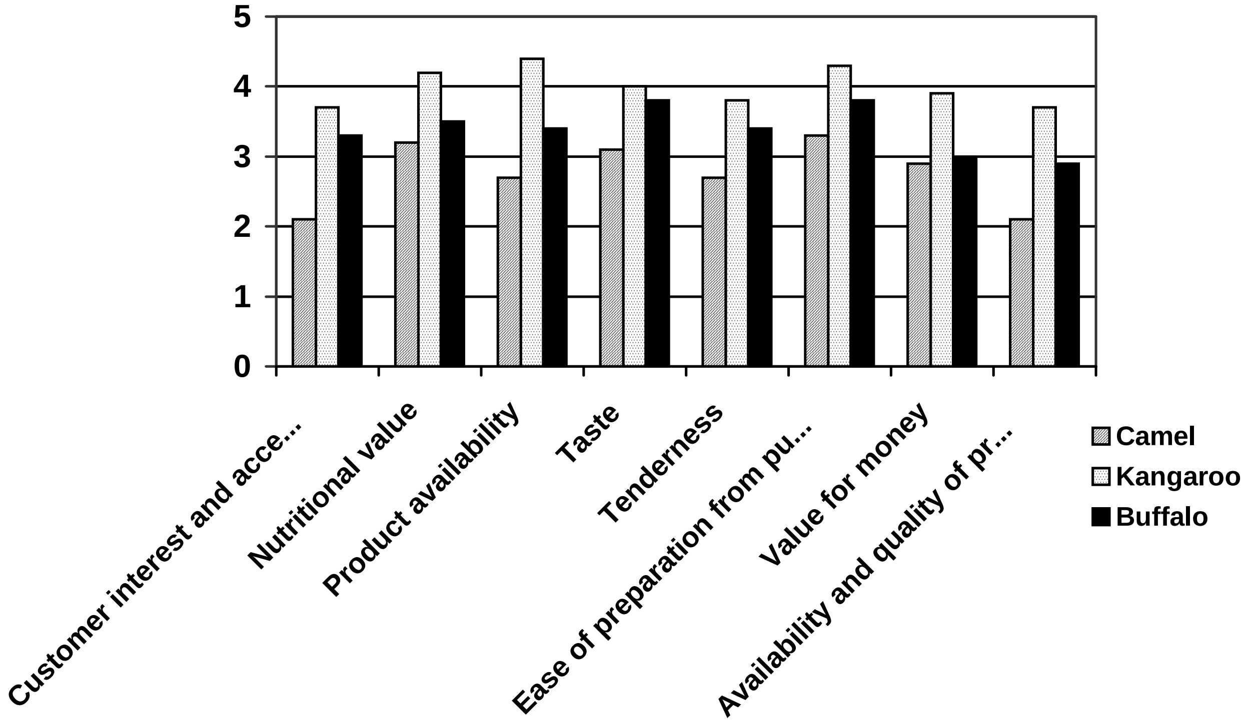
- The trade in Brisbane and Melbourne considered mainstream meats such as beef, pork, poultry and chicken as competitors, as well as game meats. Game meats typically sold by interviewees included kangaroo, venison, and various game birds (pheasant, duck, quail). According to respondents emu, crocodile and ostrich had failed to secure wide use. Kangaroo was cited as being popular in Melbourne due to low price, industry promotion, wide distribution and increased public awareness.
- Chefs in Melbourne were of the opinion that consumers are conservative, preferring traditional meats to game, and that overall there is a shift away from red meats to seafood.
- In comparison with buffalo and kangaroo, butchers and restaurants rated camel lowest on all of a number of factors (Figures 3 & 4). Camel was noticeably weaker than kangaroo and buffalo in terms of customer interest and acceptance and availability and quality of product information (CM research, 1999).

Figure 3 Butchers' perceptions



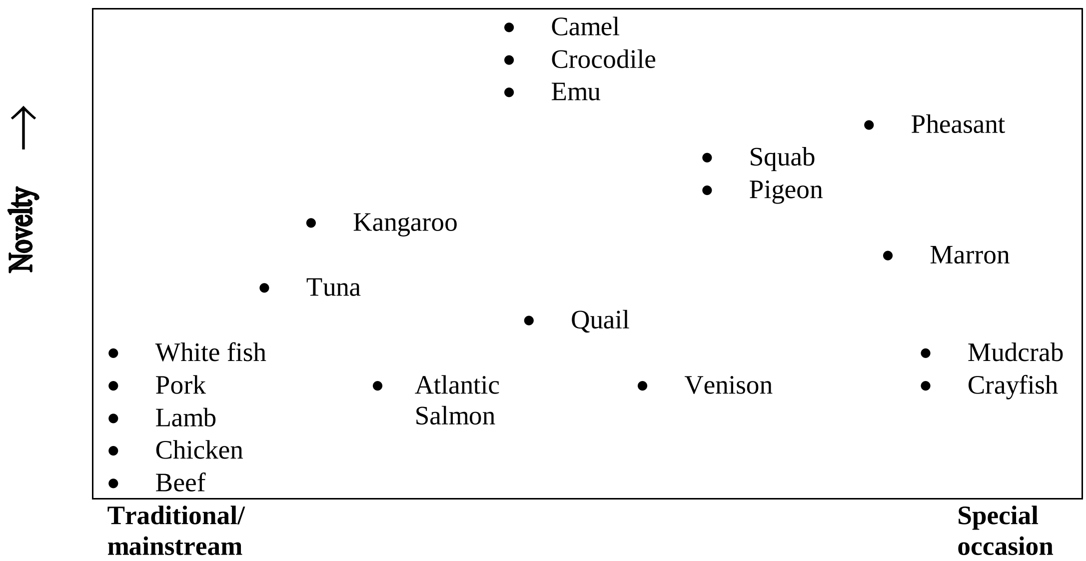
Source: CM Research, 1999

Figure 4 Restaurants' perceptions



Source: CM Research, 1999

Figure 5 Competitor mapping



Source: Tume, 1993

Competitive advantage and disadvantages

- The overall competitive analysis indicates that kangaroo and venison are more competitively positioned game meats than camel.
- Compared with other game meats, camel meat has competitive advantages in having low production costs, good availability and access to stock and low wholesale prices (Table 27). However across all of these factors kangaroo is either equal to or more competitive than camel meat.
- Camel is less competitive than buffalo and kangaroo across all of a number of factors according to butchers and restaurants (see Figures 3 & 4).
- Camel appears to be at a competitive disadvantage compared to other game meats in a number of areas including processing costs, access to suitable processing facilities, branding, customer awareness and knowledge, employment of sales people, image/positioning, customer confidence and customer service and support.

Product

Identified uses for camel products

- Rump, striploin, tenderloin, cube roll and bolar blade are used in food service applications for a range of cooking methods depending on the muscle. Blade is also vacuum-packed as a pot roast for Woolworths.
- Topside is being made into prosciutto for the foodservice sector and into stir fry strips for Woolworths.
- Outside (silverside) and knuckle (round) appear to be occasionally manufactured into jerky.
- Sausage trim is used in manufacturing sausages, patties, steakettes, formed kebabs, meatballs, and tray-packed premium mince for retail (predominantly supermarkets).
- SA Meats (Woolworths) supplies stores in South Australia, the Northern Territory, Mildura and Broken Hill with camel primals which are sliced and tray-packed in-store. The best sellers are rump, striploin, silverside, round (knuckle) and topside, although there is demand for scotch fillet (cube roll) which is often not in stock at Wyuna Meats. Stores order at random and by choice with no particular store selling big volumes.

Value adding

- Some meat manufacturers and wholesalers are producing value-added products such as sausages, prosciutto, BBQ products and stir fry strips for restaurants and supermarkets.
- Value-added camel products being supplied by game meat manufacturers and sold through supermarkets represent only one offering within a range of game meats. For example Wild Oz and Cottage Meat produce and pack a range of game meats (venison, kangaroo, crocodile, emu, ostrich) which are sold under the one brand in supermarkets.
- On the tourist route from Ayers Rock to Kings Canyon camel meat burgers ($4.50) and pies ($2.50) were sold at Kings Creek Station's garage and takeaway.
- CACIA may wish to consider developing strategies and activities to support companies such as Cottage Meat, Wild Oz and state wholesalers to expand their distribution and promote their product range. It could also encourage meat manufacturers in other states (similar to Cottage Meat and Wild Oz) to use camel meat.
- In Melbourne an opportunity was identified for halal camel trim to be sold to manufacturers of the Turkish smallgood sucuk. This opportunity, should be pursued if halal accreditation is obtained (Warfield & Leech, 1998).

Potential camel products

The following potential products were identified from trade research and marketing analysis:

- sucuk (dependent on halal slaughter);
- mince and smoked camel meat;
- smallgoods (salami and kabana);
- brisket (whole) for Chinese/Asian butchers used in braised dishes;

- diced or strips of camel leg cuts, pre-tenderised and seasoned with dry spices, ideally skin-packed trays or vacuum-packed for the HMR market;
- prime cuts such as striploin, tenderloin or rump, machine denuded and portion control sliced in skin packs for up-market foodservice (domestic) or high value export markets such as Japan or the United States (*latter dependent on export processing);*
- bulk trim for export to China for manufacture of patties, sausages, ready meals by Queensland 'Big Country' (Taurus) in off-shore facility (*dependent on export processing).*

Restaurants' perceptions of marbled cuts and portion controlled camel

- Restaurants are divided as to the desirability of using camel meat with fat marbling.

Table 28 Restaurant interest in using camel meat with fat marbling (%)

Extremely interested	4
Somewhat interested	36
Neither interested nor uninterested	10
Somewhat uninterested	24
Extremely uninterested	22
Don't know	4

Source: CM Research, 1999

- The main reasons for interest in marbled camel meat were that it would improve flavour, moisture and tenderness.
- Reasons given by restaurants not interested in marbled camel meat cuts mainly related to the health consciousness of consumers and their aversion to visible fat. One restaurant also said the fat smelt, and another that it would require more labour to trim the fat off.
- As Table 29 shows restaurants are also divided between preferring portion controlled, or whole cuts of camel meat.
- In Melbourne chefs and butchers reported receiving camel meat as individually cryovaced frozen primals. The state wholesaler in Melbourne received camel meat frozen in 25 kilogram cartons with 12 croyaced primals per carton. He then on sold the whole primals to his customers. Several chefs who were potential users wanting it chilled, trimmed and in some cases portion controlled (Warfield & Leech, 1998).

Table 29 Preferred form of camel meat for purchase by restaurants (%)

Portion controlled, already prepared and trimmed, at a premium price	48
A whole cut, which you could prepare yourself	42
Some other way	4
Don't know	6

Source: CM Research, 1999

Current and potential use of cuts and products

- As indicated in Table 30 the cuts used have been mainly rump, fillet and striploin.

Table 30 Cuts of camel meat purchased (%)

Cuts	Butchers n=8 *	Restaurants n=14 *
Rump	24	43
Fillet/tenderloin	41	43
Striploin/porterhouse	40	21
Round/knuckle	12	-
Scotch fillet/cube roll	7	21
Topside	12	14
Silverside	7	-
None	7	-

Source: CM Research, 1999

- Cuts of most interest are fillet and rump (Table 31).

Table 31 Cuts of camel meat interested in buying (%)

Cuts	Butchers n=72 *	Restaurants n=50 *
Rump	46	34
Fillet/tenderloin	52	60
Striploin/porterhouse	32	36
Round/knuckle	8	8
Blade	6	8
Scotch fillet/cube roll	34	34
Topside	18	16
Silverside	7	6
Smallgoods such as pastrami	14	18
Don't know	9	12
None	27	18

Source: CM Research, 1999

Wholesaler perceptions of camel meat

- The quality of camel meat was judged by the trade on the basis of its eating quality and readiness for use. Most trade users reported that it was inconsistent in terms of tenderness and marbling (Warfield & Leech, 1998).
- A significant issue for chefs and supermarkets was food safety and the need for assurances that camel meat is killed and packaged in licensed premises with high standards of hygiene.
- In Brisbane the trade was unsure of the shelf life of chilled and frozen camel meat and considered it desirable that the industry supply this type of information (Warfield & Leech, 1998).
- Tenderness: generally only the striploin (porterhouse), tenderloin (fillet) and rump were thought to be tender, although not always consistently so. Other cuts were considered suitable only for curries, casseroles and stews.
- Flavour: this was thought to be similar to that of beef or even milder, and definitely not gamey. There was some variability in acceptance of the flavour of the fat in the striploin and cube roll, with either no recollection of a dominant flavour or a definite dislike for the flavour and texture of the

fat. From the data supplied by CACIA camel fat is highly saturated, which could account for this perception.

- Juiciness: this characteristic is closely aligned with tenderness perceptions and some commented that camel was a little dry. However as cooking style, time and skill have such a bearing on this, it is difficult to judge the validity of this perception.
- It is clear that much more work needs to be done on the characteristics of the various camel cuts so that tenderness, flavour, colour stability, shelf life and full nutrition details can be promoted to the appropriate market segments. This work needs to be repeated over a range of slaughtered animals and is expensive when multiple cuts and repetitions are involved in the research or analysis.

Distribution

Distribution characteristics

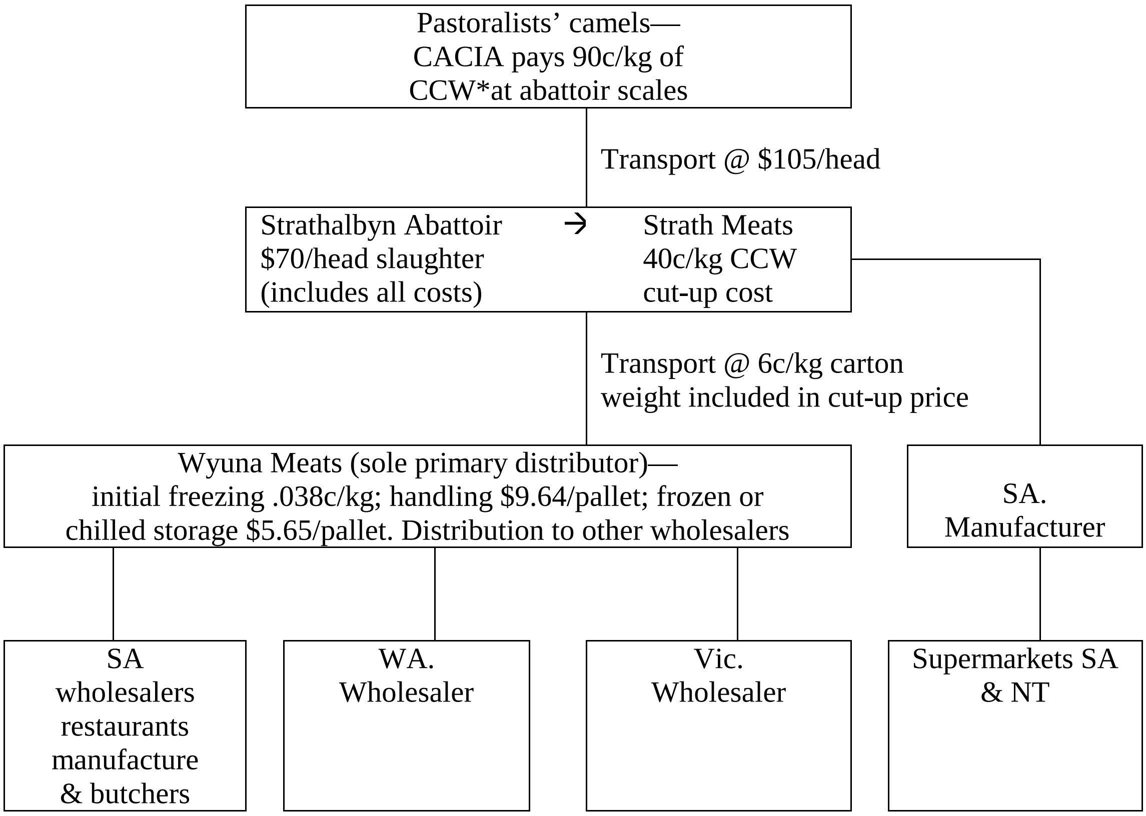
- Butchers currently purchase game meats largely through specialist game meat wholesalers, while restaurants are almost equally likely to use traditional meat wholesalers for these meats (Table 32).

Table 32 Point of purchase of game meats (%)

	Butchers	Restaurants
Specialist game meat wholesalers	77	46
Traditional meat wholesalers	14	52
Direct from an abattoir	11	10
From producer groups	22	20

Source: CM Research, 1999

Figure 6 Camel meat distribution system in Australia



*cold carcase weight

Major camel meat customers' distribution network

Wyuna Meats (SA)
- Supplies tenderloin, striploin and rump directly to some Adelaide restaurants and supplies a manufacturer with camel trim.

Manufacturer (SA)
- Supplies Woolworths with bolar blade in cryovac sold as a pot roast; topside made into stir fry strips, cryovac trays; and sausage trim in cryovac trays made into premium mince.

Manufacturer (SA)
- Produces BBQ packs under brands for Woolworths and Coles respectively. These include sausages, patties, kebabs, steakettes and meatballs. Product distributed to the Northern Territory, Western Australia, South Australia, and Tasmania only at this stage. Purchases only sausage trim.

Manufacturer (NT)
- Orders silverside in 330 kg lots, but rarely receives all of one cut due to insufficient stock. Other cuts supplied are topside and knuckle, which are unsuitable for jerky due to excessive waste. Also makes smoked camel meat for the Camel Farm (tourism venture) which the manufacturer reports as poor yielding (42% water loss during the manufacturing process). Distributes to all states, with Adelaide as the largest market for both beef and camel jerky. In every 200 kg order for Adelaide 12 kg is camel and 188 kg is beef.

SA Meats (SA)
- Purchases mainly rump, striploin, silverside and knuckle with smaller amounts of topside, cube roll, tenderloin, chuck eye, bolar blade and trim for Woolworths supermarkets. Supplies Woolworths stores in South Australia, the Northern Territory, and Broken Hill and Mildura on an order-by-choice basis. Would like more scotch fillet (cube roll) but stock is not always available.

Wholesaler (Vic.)
- Major customer is Ayers Rock Resort (NT), with rump and topside plus small quantities of tenderloin, striploin, bolar blade and sausages. Supplies striploin to Daimaru and Glen Waverley

butcher and supplied in the past Lets Eat (Coles venture) with tenderloin. Let's Eat ceased stocking tenderloin due to poor sales (see Appendix 2, Table 44).

Wholesaler (WA)

- Supplies foodservice (restaurants, hotels, caterers) only and other wholesalers; use rump and striploin.

Wholesaler (NSW)

- Supplies foodservice (restaurants, hotels, resorts, caterers) and other wholesalers; tenderloin, rump and topside are distributed with some topside being manufactured into prosciutto by their in-house butcher.

Distribution issues

- All wholesalers interviewed in Melbourne suggested that they be given exclusive distribution rights to camel meat for the Victorian market. Only one wholesaler was aware of CAClA (Warfield & Leech, 1998).
- Camel meat in Melbourne was supplied from a variety of sources. One wholesaler said he had exclusive distribution rights of camel meat in Victoria for CAClA. He said he received the meat from the abattoir in Adelaide. All of his customers reported being satisfied with the time required to fill their orders (Warfield & Leech, 1998).
- Another wholesaler had bought camel meat directly from an abattoir in Alice Springs, while another bought from its own company based in Queensland. Customers of the wholesaler who bought from Queensland complained of not receiving a follow-up supply. The wholesaler who bought directly from the abattoir in Alice Springs reported significant problems in organising a consistent supply (Warfield & Leech, 1998). Another wholesaler reported obtaining supplies from a wholesaler in New South Wales.
- All the butchers and chefs interviewed received their camel meat from a meat wholesaler. A wholesaler in Melbourne said the largest meat wholesalers servicing the hotel and restaurant trade were University Meats, Top Cuts and Commercial Wholesale Butchers (Warfield & Leech, 1998).
- A butcher and chef who were satisfied with the delivery time for camel reported receiving it within two days of placing an order. Some respondents experienced delays of four days, while other received no response to orders (Warfield & Leech, 1998).
- One wholesaler was told by the abattoir that it 'had to catch the camels' and that he may have to wait a few weeks for supply. The wholesaler said he had lost faith in the industry (Warfield & Leech, 1998).
- A chef who had used camel meat 18 months previously when at Ayers Rock Resort said he had to wait from two weeks to one month. He said the meat was bought from a meat wholesaler in Melbourne. This experience had left him with the impression that the industry was very disorganised (Warfield & Leech, 1998).
- Wholesalers, chefs and butchers who were dissatisfied with supply said that consistent supply had to be guaranteed before the industry could promote the meat (Warfield & Leech, 1998).
- Although wholesalers acknowledged that Muslims, and to a lesser degree Asians, were consumers of camel, they had limited knowledge of these market segments or how to secure access to them. All wholesalers were of the opinion that the Muslim and Asian markets in Melbourne were difficult to penetrate and that the market was small (Warfield & Leech, 1998).

Distribution implications

- Distribution arrangements for products such as camel meat often present difficulties because of relatively small volumes, financial constraints to conducting substantial marketing campaigns and loss of control over the product in the course of the chain. Additionally, wholesalers throughout the distribution system have varying levels of service, stock control and pricing margins which can contribute to a perception by end-user customers that a product is expensive and inconsistent in supply. To better reach restaurants serving game meats, distribution through traditional meat wholesalers needs to be considered.

Pricing

Preferred carcase weight 250 kg
Actual average carcase weight 221 kg (calculated from abattoir kill sheets)

Table 33 Pricing structure for camel meat

Cost of camel	Transport to abattoir	Slaughter cost	Boning/ packing cost	Transport
90c/kg HCW[1] $198.90	$105/camel $105	$70/head $70	$0.40/kg CCW[2] $88.40	$0.06/kg $15.60[3]

[1] HSW – Hot Carcase Weight
[1] CCW – Cold Carcase Weight
[1] Cost of transport to Adeliade @ 6 cents per kg carton weight included in cut-up price. All packaging (vacuum bags, cartons etc) provided by CACIA at a cost of $15.60 per camel.

TOTAL COST PER CAMEL: $477.90
(cost of hay at lairage charged to CACIA, is unknown)

- Average boning yield is 63%.
- Approximate fall of cuts and value are:

6.73 kg rump @ $8.00/kg……………………… $53.84
9.16 kg striploin @ $8.75/kg…………………… $80.15
8.06 kg knuckle @ $4.70/kg……………………. $37.88
7.5 kg outside @ $4.70/kg……………………… $35.25
6.06 kg bolar blade @ $4.70/kg………………… $28.48
3.66 kg tenderloin @ $23.00/kg………………… $84.18
3.5 kg cube roll @ $9.75/kg……………………… $34.13
6.86 kg topside @ $4.70/kg………………………. $32.24
2.9 kg chuck eye roll @ $3.90/kg………………… $11.31
58.4 kg boneless camel @ $3.50/kg……………… $204.40
26.4 kg sausage trim @ $1.20/kg………………….. $31.68

139.23 kg boxed meat based on average carcase weight as above.

Meat total value (gross)**……………………………………** **$633.54**
Less 4% to Wyuna Meats**…………………………………..** **$608.20 Total (net)**

Additional revenue from co-products

skin @ $15…………………………………$15 (carcase > 200 kg; $10 if < 200 kg)
18 kg fat @ $2.00/kg……………………..$36 (based on average return-Jamal[4])
kg bones @ $/kg……………………………retained by abattoir
feet @ $? each……………………………...retained/discarded by abattoir
(export potential)
fancy meats @ $?…………………………...retained by abattoir for pet food
(kidney, heart, liver, tail)

4 Jamel is a company which manufacturers body lotions from the camel oil

CO-PRODUCT TOTAL…………………………………………$51.00

TOTAL RETURN PER CAMEL……………………………...$659.20

Profit margin/camel $181.30

Pricing analysis

- As indicated in Table 34 there are additional costs that are difficult to calculate per camel but contribute significantly to costs.

Table 34 Additional costs for camel meat

Initial freezing of meat	0.038 cents/kg
Handling per pallet	$9.64
Chilled/frozen meat storage	$5.65/pallet/week
Dry goods storage	$120/month

Source: Seidel, 1999

- Costs associated with slaughter, boning and packing are relatively fixed. The high transport costs could be reduced considerably if slaughter could be arranged closer to the source, but it is unlikely that freezing and storage costs can be reduced if external providers have to be relied on.
- While access to export facilities might open new markets, there would be higher slaughter and boning charges associated with AQIS inspection fees and with payment for halal slaughter. Depending on the country of destination there could also be additional costs associated (for example costs arising from European Union directives).
- Finding a consistent market for the boneless camel and the sausage trim at reasonable prices would avoid the erosion of profit margins by high, long-term storage costs. Improved returns can be expected if offals, feet etc. can be sold.
- Apportionment of a percentage of the cost of the mandatory, random testing of camel meat by the National Residue Program of the Bureau of Resource Sciences needs to be considered in the final long-term analysis of pricing structures.

Marketing chain margins

- The camel meat prices shown below are from the CACIA price list. The 4% commission to Wyuna Meats is paid when product is sold.
- Wholesalers in other states apart from South Australia buy at the CACIA price plus freight. Almost without exception, the margin imposed at this point is high to cover the freight, frozen storage for a low turnover product, and costs of delivery within major capital cities. The margins calculated from the product price lists of meat wholesalers vary widely, depending on demand for particular cuts. For example

    - High margins are imposed by state distributors to cover freight from South Australia, storage and delivery costs and profit.
    - Tenderloin ranges from $30 to $32/kg.
    - Rump ranges from $12.50 to $16/kg.
    - Topside @ $12/kg.
    - Cube roll ranges from $12.50 to $16.50/kg.
    - Striploin ranges from $14.50 to $18.95/kg.

Table 35 Margins on camel meat cuts

Cut	**Margin range (%)**
Rump	56–200*
Striploin	65–116*
Bolar blade	91
Cube roll	28–69
Topside	155
Tenderloin	30–41
Sausage trim	192

*Wide margin range for rump and striploin due to demand and to lower margin accepted by one wholesaler
Source: Lang, 1999, Gowland, 1998, Sell, 1998, Bento, 1998, Cooper, 1998, Gelati, 1998,

- According to some chefs eating and buying game are risky. The risk to chefs is that game meat sells in low volumes and requires more preparation than traditional meats; the risk to consumers is that they have to pay more for game meat and may not like it (Warfield & Leech, 1998).
- The survey with the trade in Melbourne and Brisbane indicated that suggested retail price for top quality camel meat was $10 to 14/kg. However several chefs and a butcher said consumers would pay slightly more for camel than for beef. An additional problem noted by two wholesalers was inconsistency in price. According to one wholesaler an abattoir was charging twice the price he was charging for the same cut. Another wholesaler said that within four months the price quoted for striploin rose from $6.50 to 11.50/kg.
- Price sensitivity amongst ethnic groups was another issue raised. One butcher said that within the Turkish community camel meat was preferred to beef. However, they would not buy it if its price was higher than that of beef. A wholesaler and two butchers who had sold halal camel meat said it should be priced at the same level as non-halal camel meat. The Chinese communities in particular was identified as being very price-conscious.
- Some chefs said first-time buyers of camel meat would be reluctant to try the meat if it were too expensive; they would probably buy a food they knew they would like, based upon their experience. Some chefs and butchers indicated that they too were hesitant to pay a high price for the meat, but were willing to buy lesser cuts of camel meat at a lower price (Warfield & Leech, 1998).

Promotion

- A need for promotion targeting both the trade and the consumer was identified. There was almost no awareness or understanding of camel meat by the trade or consumers, and this affected demand for the meat: as the trade perceived that consumers were unaware of camel meat, it was reluctant to sell or stock it (Warfield & Leech, 1998).
- However, it was stressed by both chefs and wholesalers that the industry must ensure consistent supply and quality prior to promoting camel meat. One chef said she had problems with both Salt Bush Dija and buffalo: she put them on the menu but had to take them off because of supply problems. A wholesaler also said that too often ‘glossy material’ is produced without the groundwork of arranging supply, distribution, pricing and quality (Warfield & Leech, 1998).

- The main types of information on camel meat required by chefs were
  - recipe suggestions
  - best cuts
  - types of dishes suited to each cut
  - how to cook each cut
  - information on the supplier
  - cost of all cuts
  - seasonal supply
  - meat safe to eat (killed in certified abattoir)
  - whether the camels were wild or farmed

- One chef said it was important that the industry conduct its promotional and educational activities through the distributor. The most effective marketing was through building rapport between supplier and user, rather than distributing glossy material.
- Chefs suggested that camel meat could be promoted to the public by giving out samples at functions, providing information to consumers that the meat is safe to eat, and promoting it through the food media (newspapers, magazines, television shows).
- One wholesaler suggested that giving out free samples would be an effective way of promoting camel meat. However, another said he was in favour of this only if the industry supplied the samples free of charge. Another wholesaler suggested that the camel industry appoint a sales representative to support the wholesaler and promote the meat; the venison industry had successfully done this, though the funding had run out.

- There had been limited promotion of camel meat in Melbourne. One wholesaler had conducted a promotional evening with one of the TAFEs and invited 20 to 30 chefs from 5 star hotels, restaurants and cafes. This had been followed up with free samples given to chefs. However despite this promotion none of the chefs involved were selling camel meat when the interviews were conducted. Another wholesaler gave samples to a butcher.
- The only other promotion was by a halal butcher who had placed a sign in his window promoting diced camel meat. He said it had sold well but he could not get a follow-up supply.
- It was recommended by a chef that promotional activities be continual. Customers needed to be reminded of the existence of the product during seasons when it was unavailable, to generate and maintain their interest.
- Most people interviewed were not aware that camel meat was endorsed by the National Heart Foundation (NHF). There were mixed opinions as to the value of the NHF tick of approval. However, most chefs and wholesalers said it was more important to promote camel meat to the consumer rather than to them.
- Three descriptions of camel meat were read to respondents, and they selected the one most likely to appeal to their customers. The most favoured description focuses on the nutritional value of camel meat, and its similarity to beef in taste and texture (Table 36, first description). However a significant proportion of restaurants also were interested in the third description. A combination of these two descriptions may be suitable for restaurants.

Table 36 Preferred description of camel meat (%)

Description	Butchers	Restaurants
Camel meat is low in cholesterol and high in protein, with a similar taste and texture to beef.	41	58
Camel meat is an alternative red meat, produced from free ranging animals, free of antibiotics and other chemical growth promotants.	29	6
Camel is a versatile meat with a mild flavour, suited to the exotic spicing of North African and Middle Eastern cuisines.	30	36

Source: CM Research, 1999

- There is reasonably strong support for a name change for camel meat (Table 37).

Table 37 Support for name change (%)

How name change viewed	Butchers	Restaurants
Very favourably	23	10
Somewhat favourably	30	40
Total favourable	**53**	**50**
Neither favourably nor unfavourably	26	24
Somewhat unfavourably	10	14
Very unfavourably	11	12
Total unfavourable	**21**	**26**

Source: CM Research, 1999

- Those opposing such a move indicate that it is unnecessary, and that people are going to want to know what the product is anyway (Table 38).

Table 38 Reasons for opposing name change (%)

Reason	Butchers	Restaurants
No need/people want to know what it is	76	80
Confusing	17	13

Source: CM Research, 1999

- The name most commonly favoured as an alternative is Chamelle (Table 39). Restaurants are however not strongly in favour of any of the names tested.

Table 39 Preferred alternative name (%)

Name	Butchers	Restaurants
Chamelle (pronounced sha-melle)	34	22
Caram (pronounced kar-arm)	15	14
Aracama (pronounced ahra-carma)	11	6
Aurocha (pronounced or-ocka)	8	4
Don’t know	7	4
None of the above	25	50

Source: CM Research, 1999

- Taste testing for customers is the promotional activity most favoured by both butchers and restaurants. Recipe cards are also popular with butchers (Table 40).

Table 40 Preferred promotional activities (%)

Activity	Butchers	Restaurants
Seminars or training on cutting or preparing the meat	18	24
Cooking lessons or demonstrations for staff	19	20
Recipe cards	43	24
Provision of product information such as origin of meat	6	18
Wall posters identifying cuts	19	14
Taste testing for customers	61	58
Something else	6	6
Don’t know	1	-
None of these/nothing	5	2

Source: CM Research, 1999

Table 41 Evaluation of promotions undertaken by CACIA in 1997–98*

Activity	Objective	Theme/message	Evaluation
In-flight Magazines			
Airlink(Qantas)	Awareness	Camel on menu	Limited audience Tourists targeted
Singapore Air Korean Air Cathay Pacific	Industry profile	General interest	May stimulate trial by tourists visiting Central Australia
Other magazines			
NT Expo brochure *Austrade Export Services NT*	Advertise products	Availability	Promoting camel/camel products; valid if export-accredited
Woolworths ad.	Promote camel	Special promo. stir fry cooking	Good consumer focus
Stock Journal Rural Review	Raise interest	Co-grazing project	May increase supply, not sales
The Bulletin	Tourism/general	Racing, tours, general interest	Not focused on meat aspects
World Farming News	PR, industry awareness	Camel meat	Limited audience not target market
Aust. Farm Journal	Alternative farm ventures	Camel meat	Limited rural readership, little stimulus to sales
Finnish magazine German magazine	PR, increased awareness	Camel industry	Game-focused ethnic groups; may stimulate meat trial
Ralph	Meat attributes	Camel meat	Not obviously the typical customer readership
Newspapers			
Darwin suburban	CACIA PR	Assoc. statistics	PR focus
NT News	Camel potential	Camels exports	Promotion /limited effect
Centralian Advocate	Highlight export difficulties	Live export & meat constraints	Better approached by direct relationship with AQIS
NT News ad. for *Airlink*	Camel meat	Camel as menu addition on flights	Targeting tourists/local consumers
The Herald Sun The SMH *The Australian* AAP	General information	PR, awareness	No focused strategy to stimulate product trial, but contributes to awareness of industry & products
Events			
NT Expo 98	Raise profile	Industry products	Appropriate venue for small industry
Alice Springs Show	Industry/product promotion	Info. & product trial	Local, tourist target market
Royal Adelaide Show	promotion	Info. & product trial	Larger consumer audience
Radio			
ABC Regional ABC National ABC Country Hour BBC London 5DN	Raise profile	Interviews	PR & general increase in awareness of camel products

*Authors' assessment of the objectives, theme and evaluation of promotional activities. Most activities unplanned and apparently opportunistic in nature.
Source: Seidel, 1999

- Many of the articles, features and radio interviews (Table 41) have a public relations style and will help raise awareness of camel meat as a product and improve the image of the industry. However, unless the question of where to purchase the meat is answered each time, readers/listeners quickly forget about the product even if initially quite interested. Also, promotional activities need to be undertaken with the target market in mind, along with the specific messages that CACIA needs to communicate to each target market.

- Since it has been established that restaurants and cafes are one of the target segments future strategies should focus on placing articles in food magazines (*Gourmet Traveller/Vogue Entertaining Guide*), trade journals (*Hospitality, R&C Assoc. news, Inside Dining, Foodservice News*) and food industry publications (*Food Management News Aus., Meat International* (German publication in English) and *Food Australia*).

- Food media personalities are also useful allies in presenting new meats through food and lifestyle sections of daily newspapers, and in television cooking shows. However again this coverage needs to be directed to the geographic regions where the identified target markets are based.

Implications

- Promotional activities such as The Tall Australian (TTA) seem appropriate, but evaluation of the events and assessment of their potential to lift the market in the longer term should be undertaken after each event. TTA charges a fee for product inclusion in promotional dinners and expects all product for events without charge. But ultimately it operates only as a trading company and has commented that its price from Wyuna Meats gives it no advantage over other suppliers in the regions where the promotional activity is undertaken.
- As indicated in the trade research, when reliable supply volumes are available, consideration of a series of food media/food trade seminars or workshops could be appropriate. Information requested by chefs during the trade research could be included in the media kit. Coordination of such activities through distributors was considered desirable on the basis of the trade research.
- Once consistent, quality supply and stock levels are assured, promotional strategies focusing specifically on the key potential market segments, can be undertaken. The promotional activities need to be pro-active, targeted, and need to communicate specific messages to each of the target markets. Promotional activities to date have been reactive and have not taken into account the nature of the target market(s). Budget constraints will probably determine a heavy emphasis on public relations and promotional opportunities rather than on advertising.

Environmental considerations

Government policy/regulations

- Inconsistencies in regulations and permits between states are steadily being resolved by the requirements of the National Competition Policy and Mutual Recognition.

  Impact: CACIA could be affected if there is a need to source additional camels from Western Australia (should export markets develop). Suitable abattoirs would be needed close to the source of camels. Problems may arise as most camels are located in Western Australia and the Western Australia Camel Association has expressed only limited interest in the meat trade.
- National Residue Survey (NRS) currently imposes a very small sampling regime on the camel industry for the domestic market and for export: 10 random samples per year for heavy metals & 10 additional samples for environmental contaminants, (organochlorines, organophosphates and synthetic pyrethroids) (Hedley, 1998).

  Impact: if export markets are found in Europe—the traditional game market the EU requires a minimum of 100 samples. NRS can oppose such a requirement due to the small size of industry; but if it is unsuccessful AQIS will refuse to issue phytosanitary certificates for export. The relevant EU Directive (97/747) covers both wild and farmed game.
- Protocols for market entry into certain countries may need to be negotiated by AQIS to establish the status of camel as wild or farmed game, which are subject to different regulations on hormone and growth promotants, drugs etc (Vitolovitch & Cobb, 1998).

- Government funding support for new animal industries may cease or decline as other initiatives take priority. AusIndustry programs are constantly changing, and RIRDC funds are unlikely to increase significantly to cope with the demands from more new industries. Development support from the states may be appropriate as markets develop.
- Major changes to the red meat processing sector (slaughter, boning, food manufacture) will continue to be pursued by state and federal authorities and by industry regulatory bodies. The changes are policed through regulation.

  Impact: CACIA will be affected if lose accreditation for their processing facilities.

Non-government certifications

- Certification by the Federal Government of Muslim slaughter is dependent on inspection and approval of premises by the Islamic Council, and slaughter by an approved Islamic slaughterman. Many irregularities between Islamic groups in different states have been addressed recently and the arrangements now in effect appear to function well.

Environmental impacts

- Animal welfare issues will continue to impact on all animal industries. Community based groups will often oppose aspects of transport and slaughter and a crisis management plan should be formulated to deal with any possible welfare objections as well as health and hygiene matters. The Australian Veterinary Association concerns in relation to welfare issues, particularly for export situations should be taken into account. Live camel exports could attract unwanted attention for CACIA (Fyffe, 1998).

  Impact: negative publicity (even if untrue or unfounded) could leave CACIA with a poor public image which would be likely to reduce sales.
- The environmental or green lobby should also be considered, although the presence of a relatively small number of camels over such a large area of largely arid country would seem to represent little environmental risk. Co-grazing of cattle and camels on existing pastoral lands could be seen as a move towards greater sustainability.
- As most camels are located on land belonging to the Aboriginal Central Land Council it will be important to build good relationships with key people in this organisation.
- Possible environmental contaminants on properties where camels are now being grazed, or on less remote regions, could be an issue through the NRS testing program.

Technology effects

- Advances in meat processing technology generally may make possible production of higher quality products with significant cost savings. Smaller industries, however, are often forced to process at facilities where such high technology is not available.

  Impact: CACIA could be affected because camel products might become less competitive in the marketplace, particularly with kangaroo. Game processing establishments for kangaroo and wild boar already have installed innovative equipment in boning rooms; all cuts are machine de-nuded.
- Trends towards requirement of total trace-back systems in the mainstream red meats may complicate the situtation of camel meat which is sourced from feral stock (of unknown history), but must be processed as farmed livestock which usually has full genetic history and an objective QA system (Evans, 1999).

  Impact: a fully objective auditable QA program will be difficult to design for camel, and can commence from capture only. The small camel meat industry, must rely on many external service providers and has little control over handling practices.

- Video image assessment (VIA) will possibly become more widely used as the technology is improved and its cost reduced. A dedicated deer facility is already working on a modified system for venison products, and Qantas Flight Catering has been using VIA system for over three years for red meats.

  Impact: capacity to compete effectively with more established game meats could be reduced. The size of the industry and financial constraints will be major challenges for the future.

5—SWOT analysis

Strengths	Weaknesses	Opportunities	Threats
• Camel meat is associated with the Middle East and outback Australia. This is a positive as there is strong interest in ethnic foods and growing use of wet dishes in the café and restaurant segments. • Camel meat has low harvesting costs compared with some game meats. • Camel can provide primal cuts of good size for foodservice and individual consumers, in comparison with some game meats such as kangaroo, emu and goat. • Camels domesticate readily, appear unstressed during handling— factors that might lead to meat of better eating quality. • Descriptive language for live camels has been published.	• Chefs associate camel meat with heavier winter dishes, which may restrict its market. The industry needs to position camel meat as being suitable for year-round consumption. • Cafés and restaurants are increasingly demanding meat that is ready to use (portion controlled, denuded, no trimming/wastage). The camel industry is at a disadvantage as it doesn't have access to high-tech packaging equipment or equipment to produce denuded cuts. • There is variability in marbling and tenderness within the same cuts. • Limited financial resources are available to re-position camel meat to counter the current novelty image held by the trade and consumers. • Lack of halal certification currently excludes the industry from the domestic Muslim market through butcher shops.	• The game meat market in Australia is slowly increasing. • Research could be undertaken to identify the factors that influence eating quality of camel meat. • Consumer and trade research indicates a need to rename camel meat (for example as for venison and Salt Bush Dija). This would also provide an opportunity to re-position camel meat to appeal to the various target markets. • A brand should be developed representing high quality product and service, once consistency of quality and supply is achievable. • The foodservice sector in Australia is growing, which represents opportunities for the camel industry to expand its distribution, particularly in Sydney and tourism areas leading up to the Olympic Games. • The biggest users of game meats are 5 star hotels and fine dining restaurants. There are opportunities for camel meat to increase its presence in these segments as well as in the 3–4 star hotels which are using a limited amount of game meat, and in the growing café/casual dining segment.	• A large retailer who buys whole primals and cuts and packages in-store is not presenting camel meat in its optimal form (e.g. as they don't remove the external connective tissue or sinews on primals which are cut and packaged in-store). • Camel meat is perceived by the trade and by consumers to be a novelty product for one-off consumption. • Kangaroo is the largest game meat competitor and has significant price and technology advances over camel meat. • Game birds (particularly duck) are growing in popularity, particularly in the fine dining restaurant segment. • There is a lack of competitiveness (due to freight costs) for butchers (gourmet, halal) to buy small quantities direct from Wyuna Meats except in South Australia. For butchers to buy from state wholesalers the high margins also may make camel meat unattractive. • Regulation and inspection costs are increasing for export-accredited facilities.

• Documentation is available on capture and handling of camels for abattoirs. • A code of practice for the welfare of camels has been agreed to by the states and the Commonwealth. • Strong R&D support exists from the Northern Territory, some state government departments and RIRDC. • There exists a well functioning industry association, CACIA, which represents the interests of most camel enterprises. • Camels are tourist attractions in the wild, on farms and at popular tourist locations such as Broome. • There has been innovation in the development of camel products by the Executive Officer CACIA. • A publication is available on selected cuts for camel meat.	• CACIA does not stock sufficient quantities of the full range of cuts (customers receive cuts they don’t order as substitutes, or don’t get sufficient supply of preferred cuts). • Consumers and the trade report that camel meat looks and tastes like beef but is at a price disadvantage. • Consumers and the trade have the perception that camel is tough and chewy. Taste trials of camel meat have resulted in varied responses from tender to tough, which would indicate that CACIA is at present unable to deliver a consistent product. Developing a market with an inconsistent product will undermine market confidence, which has been a problem for other game industries. • CACIA is at present using the image of a camel on some promotional material, which was found to be inappropriate by both consumer and trade research. • Consumers and the trade associate camel meat with the animal, which gives rise to concerns about hygiene and cleanliness and to negative perceptions that the meat is smelly and tough.	• The popularity of modern Australian cuisine represents opportunities for camel meat to be positioned in this area, as most establishments carrying other game meats describe their cuisine as modern Australian. • As fine dining restaurants and 5 star hotels are the main users of game meats there are opportunities for greater use of prime camel cuts in these segments. • The growth of cafés and casual dining restaurants represents an opportunity for the camel industry to target this market with cheaper cuts. • The trend towards more wet dishes (stews, curries) complements the image of camel as well as being suited to some of the cheaper cuts for the café/casual dining segments. Camel was perceived by restaurants to be suited to wet dishes as well as grills & BBQ. • Opportunities exist to develop up-market smallgoods products (prosciutto) for the café/restaurant market as well as a range of light recipes featuring camel meat satays and kebabs to appeal to the summer trade. • Research indicates that some domestic restaurants are interested in marbled camel meat cuts.	• Increased costs would arise if NRS sample size is increased. • Should demand increase for camel meat there could be supply difficulties as most camels are on land belonging to the Aboriginal Central Land Council and in Western Australia, where there is limited interest in the camel meat market. • Funding support from RIRDC and other Federal Government agencies (AusIndustry) and state government departments is subject to changes in priorities and increasing demands from other new industries. • Dependence on mainstream abattoirs and lack of control of their QA and hygiene programs could result in failure to supply contracted markets if these facilities are closed down by EU, United States or AQIS inspectors. • Animal welfare issues and lobby groups pose a threat which should be prepared for by developing a crisis management plan (particularly in relation to live camel exports). • Residues and contaminants in camel meat could undermine customer and trade confidence and result in loss of a market. • No total trace-back system is possible.

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• Experience is available in some abattoirs for slaughtering and processing of camels. • Experience is available in exporting live camels by air and sea. • There is good access to suitable stock.	• Existing state wholesalers of camel meat have limited or no Muslim clientele. To gain access to this market CACIA needs to link into the distribution system used by halal butchers. • Camel meat has higher processing costs (compared with other game meats) as a result of the need for transport to the abattoir at Strathalbyn. • There is poor and limited access to processing facilities compared with other game meats (domestic abattoir far from source of camels, no halal or export accreditation). • Consumers and the trade perceive camel meat to be unknown and strange compared with most game meats (except crocodile). • Camel meat at present is positioned on nutritional grounds (e.g. low fat, cholesterol) the same as all other game meats. Low fat is a difficult positioning for camel given that several cuts are heavily/moderately marbled. • There is a lack of confirmed knowledge about cut characteristics in relation to eating quality, and therefore the suitability of cuts for different recipes and market segments.	• Game meats in general are poorly represented as entrées in 5 star hotels and fine dining restaurants. There is an opportunity to extend the number of camel meat dishes served as entrées. • The supermarket trade could be developed (through improved presentation and eating quality) by providing training on cutting methods to supermarkets in the targeted geographic areas. • Distribution of value-added products (e.g. BBQ packs) could be extended in Western Australia supermarkets (such as Advantage supermarkets which are carrying emu meat supplied by The Tall Australian). • A future opportunity, which should be monitored when sufficient supply is available, is the HMR market in traditional and new concept supermarkets. Camel meat (diced/strips of camel leg cuts) would need to be presented and positioned as a themed product range (e.g. Moroccan, Lebanese, Arabian spices or Egyptian) that fits the current ethnic food trends. • To develop the retail supermarket segment in the targeted states point of sale and promotional information (e.g. recipes, handling, cooking tips) could be developed in association with manufacturers and supermarkets.	• Very few butchers or restaurants in Australia are selling any game meat or birds. • There is a general lack of interest in stocking or selling camel meat by restaurants, butchers and supermarkets due to perceived lack of demand by customers. • Companies considered to be professional have still failed with game meat products in Queensland supermarkets. • Camel is perceived by butchers and restaurants to be less competitive than kangaroo and buffalo.

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• No guidelines exist for cooking and preparing camel meat to ensure that it meets the expectations of consumers in terms of tenderness. • CACIA does not own or control storage facilities, which leads to high costs of handling and storage of camel meat compared to game meats such as kangaroo. • Promotion is untargeted and *ad hoc*, with insufficient attention to the messages that need to be communicated to camel meat's target markets, and no link as to where camel can be bought. • It is difficult to source camels in Western Australia because of distances to appropriate abattoirs. • Butchers and restaurants have indicated interest mainly in top quality cuts rather than lesser cuts. • A significant proportion of restaurants selling game meat purchase it through traditional meat wholesalers. Most camel meat is sold by specialist game meat wholesalers.	• There is strengthening demand for camel meat by butchers and restaurants. Opportunities exist for selling camel meat to butchers in Queensland and South Australia and restaurants in the Northern Territory and Queensland. • Opportunities exist to extend the presence of camel meat in the gourmet butcher shops in capital cities with prime cuts and up-market smallgoods, targeting higher income consumers who may be consumers of other game meats. • The domestic Muslim market could be targeted through halal butcher shops with cheaper cuts for stews, curries and smallgoods in all capital cities, particularly Sydney, Melbourne and Perth. • There may be opportunities for brisket in Chinese/Asian butcher shops for use in braised dishes. • The use of trim and 90CL boneless could be targeted at other meat manufacturers (similar to Cottage Meats & Wild Oz). This market could be further extended if export accreditation were obtained for companies like Taurus in Queensland, and access to the European smallgoods market could be secured.

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- There is potential export market for camel fat if export accreditation can be obtained.
- An opportunity exists to adjust the positioning statement for camel meat to the restaurant sector.
- Opportunities exist to develop a promotion/communication program that is pro-active and directed at camel meat’s trade and consumer target markets.
- Opportunities exist to undertake sampling with restaurants and butchers and to develop appropriate recipes.
- Training and information seminars could be conducted with chefs and food media (target segments and areas only).
- There is an opportunity to harvest camel as a sustainable resource..

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6—Marketing plan

Introduction

- This marketing plan has been developed from the preceding marketing research. It sets out a strategic direction, and outlines specific activities that can be pursued by the camel meat industry to better meet the needs and expectations of its target market. Implementation of this plan will result in improved marketing and sales performance of camel meat products.

Key issues[1]

Product

- Some meat merchandise managers perceive that there may be opportunities for camel meat in the HMR market as well as in developing more value-added, ready-to-use products.
- Opportunities exist for halal-certified camel trim to be used in Turkish smallgoods.
- Some restaurants and butchers indicated interest in camel smallgoods.
- Barbecue camel packs are suited to the tourism market.
- Some restaurants are interested in marbled camel meat.
- Problems with inconsistent tenderness and marbling need to be overcome.
- There is growing interest in wet dishes, and camel is perceived to be suited to such dishes as well as to curries, barbecues and grills.
- Chefs identified the most important attributes of meat as quality, consistency, tenderness, taste and flavour.

Branding

- No branding currently exists.
- Some value-added camel meat products are sold under the brands of game meat wholesalers and manufacturers.
- Trade users who have had bad experiences with camel meat consider all camel meat suppliers unprofessional.
- Inconsistent quality would undermine a branding strategy.
- Chefs are increasingly interested in branded meat and full information on the products they use.

Product packaging

- CACIA camel meat loses its identify at either Wyuna Meats or the state wholesaler level.
- Some chefs have indicated a preference for portion controlled, ready-to-use camel meat. Camel meat is presently sold as whole primals.
- Because game meats including camel have slow turnover in supermarkets extended shelf life is important.
- The HMR category uses MAP packaging and therefore to enter this area trials with value-added camel meat would be needed.

Pricing

- Transport costs of camels to the abattoir in South Australia are excessively high compared with equivalent costs for other game meats.
- The wholesale and retail prices of camel meat products are comparable to those of other game meats.
- State wholesalers apply high margins to camel meat products.
- High price was cited by some butchers, restaurants and supermarkets as a reason for not using more camel meat.
- Various cuts are at present discounted by CACIA to encourage sale if they are approaching the end of their shelf life.

[1] For more details refer to the SWOT analysis

Distribution

- Camel meat is being distributed only by specialist game meat wholesalers, while restaurants serving game are equally likely to buy game from traditional wholesalers.
- CACIA has little control over camel meat once it leaves the abattoir at Strathalbyn.
- Freight distances from South Australia have led some state wholesalers to sell only frozen camel meat, while most restaurants prefer chilled meat.
- Existing wholesalers have no clientele in the Muslim market.

Marketing research

- There is a lack of systems in place to monitor sales performance, demand for cuts and customer feedback.

Sales management

- There are opportunities to establish closer relationships with wholesalers, retailers and chefs and build each others' businesses.
- There are opportunities to improve communication and share information on product and marketing problems and opportunities.
- Improvements can be made to ensure that the cuts ordered by customers are available.

Advertising/sales promotion/public relations

- Opportunities exist to focus promotional activities on the target market with specific messages.
- An opportunity exists to modify the positioning of camel meat in relation to the foodservice sector.
- Camel meat needs to be divested of any associations with the actual animal, although this does not appear to be an issue for the international tourist market.
- Research indicates a need to develop a new name for camel meat and to focus on sampling for both the retail and foodservice sectors.

Marketing goals

Quality

- Provide each market segment with a consistently high quality (ie tenderness, fat selvage and marbling) product which meets their specific requirements.
- Direct consistently marbled cuts at segments of the foodservice sector to capture new market opportunities.

Product

- Produce new value-added products for the tourist, HMR and foodservice markets.
- Enter the halal and export markets for camel meat as identified by the marketing research.

Branding

- Establish and support a brand to the trade level that symbolises high quality product and service and that will become the supplier preferred by the trade.
- Support and encourage customers for value-added products to increase the volume of camel meat sold, and establish loyalty between customers and suppliers.

Product packaging

- Use high quality packaging that meets the needs of buyers and supports the branding strategy.

Pricing
- Maintain competitive pricing in line with that of other game meats.
- Establish a planned discounting system that is interlinked with the promotional strategies and rewards customers.

Distribution
- Introduce an efficient and low cost distribution system capable of ensuring that the product reaches the target market promptly and in the format required.

Marketing research
- Introduce a timely and effective sales and marketing information system.

Sales management
- Become the preferred supplier of users of camel meat by developing strong, trusting relationships.

Advertising/sales promotion/public relations
- Raise awareness and increase trial of camel meat by the trade and the final consumer, to stimulate consumption.
- Establish awareness and understanding of the branding strategy by the trade.

Target markets
Primary
- Potential target markets identified for camel meat include:
  - international and domestic tourists visiting the Northern Territory and the Sydney Olympic Games;
  - Northern Territory residents in tourism areas, for their own use and to serve to visitors and South Australians;
  - Muslims (once halal-certified camel meat is available) from Middle Eastern countries and Asia in all capital cities (particularly Sydney, Melbourne, and Perth).

Secondary
- consumers of other game meats: high income professionals, living in affluent suburbs in metropolitan areas, particularly in South Australia.

Intermediaries
- The above target markets would be best reached by distribution of camel meat products through:
  - supermarkets in tourist areas—Woolworths and Coles;
  - on-site outlets at the Sydney Olympic Games as part of a range of low cost, ready-to-eat game meats;
  - new concept supermarket stores in metropolitan areas—Metro, Express, Let's Eat;
  - Franklins Big Fresh, - as part of the monthly promotions of game meats in these stores;
  - halal butcher shops in Sydney, Melbourne, Perth, Brisbane and Adelaide;
  - traditional and gourmet butchers in Sydney, Brisbane, Adelaide and Melbourne;
  - restaurants—casual and fine dining—in hotels and motels and resorts in the Northern Territory, South Australia and Sydney
  - backpacker hostels, resorts, self-catering units and camping areas in the Northern Territory.

Positioning
- Camel meat will compete by targeting defined customers within each of the market segments and positioning the product to appeal to each customer group. A point of differentiation will be providing a consistently high quality product and service.

Primary market

Tourists international and domestic to NT

- In the tourism segment camel meat should be differentiated as an adventurous meat, providing the ultimate outback experience and a taste of bush foods, through a range of ready-to-use products.

Local residents in NT and SA

- For this segment camel meat should be positioned as a versatile, regional meat for barbecuing and slow-cooked wet dishes.

Muslims consumers

- For this segment camel meat should be positioned as a familiar meat offering an alternative to other permitted red meats, emphasising
  - its suitability for Middle Eastern and Asian spicing;
  - its relatively low cost but desirable nutritional attributes.

Secondary market

Consumers of other game meats

- For this segment camel meat should be positioned as an adventurous meat suited to exotic African and Middle Eastern flavours, emphasising:
  - that its nutritional attributes are similar to those of other game meats.

Intermediaries

Positioning for the trade (chefs, butchers, supermarket buyers etc.)

- The positioning statements used to target consumer groups served by the trade (e.g. tourists, Muslims, etc.) should also feature in any trade-directed promotional material or presentations. In addition the following points should be highlighted:
  - prime cuts are tender and can be supplied fully trimmed and portioned.
  - familiar cut names (as for beef) offer the same versatility of cooking styles.
  - initial trial by diners is encouraged by entrée size serves or portions served as part of a mixed entree.
  - lower cost cuts make excellent, slow-cooked Moroccan and Middle Eastern dishes.

Strategy and tactics

Quality

Goals	Strategy	Activity
1. Provide each market segment with a consistently high quality (ie tenderness, fat selvage and marbling) product which meets their specific requirements.	• Develop and implement QA programs.	• Implement and enforce the code of standards mentioned in *Capture and Handling of Camels Destined for the Abattoir*. • Work with the abattoir, the boning room and the national and state wholesalers to improve their QA/ programs to produce a more consistent product. • Undertake sensory evaluation to assess the eating quality of all camel cuts and products and the factors that influence this quality. • Undertake sensory evaluation to determine the suitably of different cuts for wet dishes, barbecuing and grilling.
2. Direct consistently marbled cuts at segments of the foodservice sector to capture new market opportunities.	• Develop a grading system for marbled cuts and target these at the restaurant and café segments.	• Work with chefs, wholesalers and the boning room to develop & implement a grading system for marbled cuts.

Product.

Goals	Strategy	Activity
1. Produce new value-added products for the tourist, HMR and foodservice markets.	• Develop relationships and work with existing suppliers to the HMR market and with manufacturers currently value adding to camel meat.	• Develop with existing suppliers a new up-market BBQ pack for the tourist market.
	• Maintain regular contact with current and new manufacturers of camel meat products to establish relationships and maintain awareness of camel meat.	• Approach other game meat companies to develop a concept for producing a themed range for the HMR market via existing suppliers to this market. • Contact suppliers to the HMR sector and present the concept of a range of camel products on the theme of Moroccan and African cuisine. • Approach the current prosciutto manufacturer to extend distribution to other states; assist this process by providing links with state wholesalers of camel meat. • Approach small traditional smallgoods makers to produce pastrami/salami and produce and halal butcher shops to produce smallgoods such as sucuk.
	• Plan for a complete portfolio of physical and chemical information on camel muscles.	• Commission analysis of water binding capacity, pH range and resistance measurement. • Prepare technical sheets.
2. Enter the halal and export markets for camel meat as identified by the marketing research.	• Pursue and lobby for access to export- and halal-accredited facilities.	• Compile a list of abattoirs and boning rooms with export accreditation and halal certification; contact those situated closest to the source of camels to assess possible access. • Investigate the feasibility of gaining export or halal certification for the existing abattoir and boning room.

Product cont.

Goals	Strategy	Activity
		• Approach and lobby state and federal politicians on both sides for either upgrade of existing facilities or access to other appropriately licensed facilities, using the employment, trade and economic development of rural areas. Use the media to drive the message—get professional advice on using the media. • Approach other game meat producers with access to export/halal facilities to form alliances, such as the joint ostrich and crocodile processing in Queensland.

Branding

- Branding is useful only if a consistent quality product and service can be delivered as required by the customer and if the attributes of the brand are communicated to the customer. If these are not feasible branding should not be adopted.

Goals	Strategy	Activities
1. Establish and support a brand to the trade level that symbolises high quality product and service and that will become the supplier preferred by the trade.	• Develop a brand to the restaurant and supermarket level that will distinguish quality assured, consistently high quality camel meat from the products of other potential suppliers.	• Ensure that branded product guarantees the following: - QA; - consistency; - broad range of product in various forms; - supply of product as ordered; - training; - monthly contact (at least with in-store supermarket meat managers and wholesalers) to monitor branded product and obtain feedback; - brand and logo attached to actual product received by chefs, wholesalers and in-store supermarket meat managers; - promotional support to wholesalers and manufacturers of retail camel meat products.

Branding (cont.)

Goals	Strategy	Activities
		• Commission a graphic designer to develop a professional brand and logo. The following issues should be considered: - brand and logo should be attached to all product that meets the specifications of the brand. - brand and logo should be attached to all communications (e.g. faxes, media releases, letters, surveys, feedback forms, price lists) directed at the trade and the media. - the image of the camel should not be featured, so that brand could later be extended to the consumer level. - see Appendix 5 for suggested branding brief.

Branding (cont.)

Goals	Strategy	Activities
	• Launch the brand and communicate its attributes to the trade and the media.	• Produce a folder with inserts that list attributes of the brand and of camel meat. Use professional designers and desktop publishers. • Organise a series of lunch or dinner presentations with wholesalers and their customers, supermarket merchandise managers and in-store meat managers, butchers and the media.
2. Support and encourage customers for value-added products to increase the volume of camel meat sold, and establish loyalty between customers and suppliers.	• Support the brands of companies presently selling value added camel meat products.	• As part of the branding strategy, provide promotional support to manufacturers at present selling camel meat products at the retail and trade levels. Support could be in the form of providing resources for tasting, production of recipes, promotional material and helping these manufacturers expand their distribution. • Investigate opportunities for co-branding with manufacturers (e.g. Wild Oz, Cottage Meats) and wholesalers by linking it with promotional support (e.g. in-store tastings, on-pack recipes/cooking instructions).

Product packaging

Goals	Strategy	Activities
1. Use high quality packaging that meets the needs of buyers and supports the branding strategy.	• Use the packaging to implement the branding strategy and maintain the product's identity through to the chef, butcher and in-store supermarket meat manager level.	• Place the brand on all primal and portion controlled packs to the trade. • Investigate portion controlled packaging in association with state wholesalers and their customers. • Select bags specified for chilled storage and for frozen storage. • Use bag size to suit individual cut size (excess trimmed).
	• Approach and support companies selling camel meat that indicate a willingness to investigate extending the shelf life of both chilled and value-added camel meat products.	• Investigate MAP for value-added products for the HMR market, in conjunction with current suppliers to this market. • Compare heat shrink vacuum packs with standard vacuum pack for extended shelf life. • Undertake general shelf life trials (microbiological, pH changes, colour stability and oxidation) for chilled and frozen product and a range of packaging methods.

Pricing

Goals	Strategy	Activities
1. Maintain competitive pricing in line with that of other game meats.	• Seek to reduce storage costs. • Review pricing regularly to ensure cost/margin coverage.	• Reduce storage periods by working with wholesalers and manufacturers of camel meat products to develop new markets and increase existing markets for their products.
2. Establish a planned discounting system that is interlinked with the promotional strategies and rewards customers.	• Reward existing customers for loyalty and volume purchases as well as encouraging trial and repeat purchases by new customers.	• Update processing costs from source to distribution with each kill. • Compile a schedule of discounts relating to volume and frequency of purchase as well as discounts to encourage trial by new customers. • Increase standard prices to accommodate the discount scheme, if necessary. • Communicate the benefits of the discount scheme to key customers. • Implement a recording system to monitor customer purchases so that each customer is appropriately rewarded under discount scheme. • Establish special discounts linked to promotional activities e.g. such as tastings and media and trade events. Plan these over a 12-month period.

Distribution

Goals	Strategy	Activities
1. Introduce an efficient and low cost distribution system capable of ensuring that the product reaches the target market promptly and in the format required.	• Reduce the costs and improve the efficiency of the distribution network.	• Seek cooperative abattoirs closer to the camel source. Identify constraints and limitations to local slaughter—get professional assistance to develop a lobby strategy.
		• Regularly update the costs of distribution from farm to the wholesaler and retailer levels to identify potential areas for savings.
		• Investigate less expensive refrigerated road transport, at least to the eastern states, and seek quotes for back-load rates. Link with other meat companies for shared transport space.
	• Seek to expand distribution of camel meat by traditional meat wholesalers to those clients, including restaurants and butchers, who sell game meats.	• Compile a list of the main meat wholesalers and specialist distributors (e.g. Palatable Partners) in the targeted states. Approach them to carry camel, offer a range of price and promotional incentives and outline promotional activities planned in their area.
	• Once halal accreditation is achieved (see 'Product' above), seek to expand distribution of camel meat by distributors whose clientele includes halal butchers.	• Identify the distribution network to halal butcher stores in each of the targeted states (as above).
	• Seek to improve packaging and distribution networks to ensure that restaurants can obtain chilled product if required.	• Undertake trials with alternative packaging systems and evaluate the cool chain and shelf life from the abattoir to the chef/retailer level. Communicate results to wholesalers.

Marketing research

Goals	Strategy	Activities
1. Introduce a timely and effective sales and marketing information system.	• Develop and implement sales and marketing information systems.	• Establish relationships with wholesalers through regular telephone contact and personal visits. Where feasible, attempt to visit wholesalers' customers. Obtain regular verbal feedback on product and service levels. • Link restaurants/butchers to PR or promotions (competitions, food festivals or signature dishes) to encourage information exchange. • Design a sales feedback form to track sales volumes, stock remaining, customer identification and order frequency. Forecast the cuts and volumes required to improve stock control. • Analyse sales data monthly for each customer to identify changes in the volume or types of cuts/products purchased. Discuss changes with customers to identify reasons or explore potential opportunities. • Conduct regular in-store audits of supermarkets, butchers, cafés and restaurants carrying camel meat and other game meats, to assess packaging, turnover, presentation, quality, product range, price, and trends in the way product is being cooked and served in the foodservice sector. • Keep abreast of media issues, the potential impact of government legislation and trends in the retail and foodservice sectors. • Conduct formal marketing research with wholesalers, butchers and chefs every two years.

Sales management

Goals	Strategy	Activities
1. Become the preferred supplier of users of camel meat by developing strong, trusting	• Develop mutually beneficial relationships with wholesalers, retailers and restaurants.	• Conduct product information sessions for wholesalers and their customers.

relationships.	• Train and support people who have access to or influence with the target market to become an indirect sales team.	• As part of the pricing strategy (see ‘Pricing’ above), offer bonuses, free product and discounts linked to frequency and volume of purchases. • Regularly contact retailers and wholesalers to get feedback and keep them informed of new developments, particularly in relation to new products, packaging and promotional activities. • Focus on assisting wholesalers and retailers to build their businesses through promotional support, supplying product information required by their customers, and identifying new customers. • Conduct product and social events targeting tourist operators, guides and bus drivers in the Northern Territory. Regularly provide free samples of new camel meat products and information on where they can be eaten or purchased. • Put together and update regularly a fact sheet about the industry to be used by tour operators.

Advertising/sales promotion/public relations

Goals	Strategy	Activities
1. Raise awareness and increase trial of camel meat by the trade and the final consumer, to stimulate consumption.	• Communicate the attributes of camel meat that are important to the trade and the final consumer.	• Compile a list of publications targeting both the trade and the final consumer and assess the costs–benefits of advertising in them. • Commission the professional design of a half or full page advertisement for inclusion in the tourism booklet ‘Welcome to Central Australia’ to target domestic and international tourists. Elements from the positioning strategy should be included (i.e. adventurous, bush food, ultimate outback experience), along with information on supermarkets and restaurants where camel meat products can be purchased. Humour along the lines used by Airlink (Qantas) and Overlanders restaurants should be considered.
	• Initiate links with tourism operators and organisations.	• Compile a list of tourism operators, organisations and centres located in the Northern Territory.
	• Raise awareness and increase trialing of camel meat by tourists.	• Compile a list of tourism/information centres, youth hostels and camping areas frequented by domestic and international visitors. Determine the feasibility of distributing a brochure, targeting tourists, on camel meat through the tourism information centre in Alice Springs.

Advertising/sales promotion/public relations (cont.)

Goals	Strategy	Activities
		• Develop a brochure or poster on camel meat targeting both domestic and international tourists; focus on the positioning (i.e. adventure, bush food, outback experience) and distribute through the tourism centre, operators, hotels/motels, backpacker hostels and restaurants in Alice Springs and the surrounding area.
	• Identify suitable media and target them with messages that need to be communicated to the trade and the final consumer.	• Compile a list of media (TV, radio, newspapers, magazines) that reach the trade and the final consumer. • Attempt to establish relationships with the editors and writers of the media to be targeted. Issue media releases to these media before and after product launches and seminars and when a newsworthy development occurs that is of interest to the trade or the final consumer. • Prepare a media kit and distribute it to the media at product launches and seminars.
2. Establish awareness and understanding of the branding strategy by the trade.		• Investigate opportunities to participate in ‘The taste of the Territory’ promotional activities if they are directed at the target market. • Approach tourism operators to incorporate value-added camel meat products in their set menus to tourists on organised tours.

Advertising/sales promotion/public relations (cont.)

Goals	Strategy	Activities
		• Undertake special promotions relating to indigenous foods and/or outback adventure with local restaurants, resorts and supermarkets in the targeted tourism areas. Organise these with manufacturers of camel meat, tourism operators and organisations. • Consider targeting tourists and residents in tourism areas by offering a 'buy one, get one free' meal at restaurants and cafés in Alice Springs—distribution to be via tourism operators, the tourism information centre or advertisement in 'Welcome to Central Australia'. • Investigate opportunities to target camel racing events to promote camel meat through tastings and displays.
	• Undertake sampling and cooking activities involving camel meat.	• Identify merchandise companies that undertake supermarket sampling. Carry out sampling in conjunction with manufacturers in supermarkets stocking camel meat products, particularly during the tourism season.

Advertising/sales promotion/public relations (cont.)

Goals	Strategy	Activities
		• Organise group product seminars and launches with the trade and its customers (e.g. restaurants) and the media. As part of these offer special price promotions, cooking and preparation demonstrations, and distribution of an information kit containing recipe cards, a carcase description booklet, information on the attributes of the camel industry brand, a product list, a nutritional profile, and information on shelf life and pricing. • Approach leading chefs in the restaurant and café sectors prior to product seminars and launches to develop a range of recipes for camel focusing on Moroccan, African, bush food and European themes using a range of cuts. Winners could present their dishes and recipes at the launches. • Put together competitions targeting the final consumer and organise these with camel meat suppliers to supermarkets. Competitions should focus on encouraging trial or repeat consumption (for example by requiring that entrants first make 3–5 purchases of camel products in supermarkets. • Investigate developing and improving point-of-sale material including, shelf labels for camel meat, in association with manufactures of camel meat products.

Advertising/sales promotion/public relations (cont.)

Goals	Strategy	Activities
		• Compile a list of trade and consumer food fairs occurring in the targeted areas. Participate in relevant ones in combined displays with other game suppliers or Territory groups.
	• Establish a consistent identity for all communication material, focusing on the elements of quality, consistency and adventure.	• Commission a public relations company to develop a corporate identity for the camel meat industry; use this for all communications with the trade, consumers and the media.

Appendix 1—Case studies

Case studies have been prepared to analyse the strategies new meat industries have used to develop their markets, and to determine how successful these strategies have been. This information will be useful for analysing the most appropriate strategies for development of the camel meat industry. There are significant differences in the marketing strategies adopted for goat meat, venison, kangaroo and Salt Bush Dija[2]; some of the experiences of these industries may provide a guide for future development of markets for other emerging livestock industries.

GOAT MEAT AND SALT BUSH DIJA

General industry structure and company structure

There is a wide difference in structure between the goat meat and the Salt Bush Dija industries. The domestic goat meat industry has to a large extent been a secondary market for the dairy and fibre goat meat industries. Therefore administration of the industry has been through organisations mainly established to serve the dairy and fibre sectors. The meat export sector has been based on feral goats and the control of this industry has been mainly in the hands of processors and exporters. With the introduction of specialist meat breeds such as the Boer goat, breed societies are playing a role in coordinating the interests of producers. Recently, goat meat producers in Queensland have formed a cooperative with the aim of giving them greater control over the marketing of their products. In other states there are moves to form formal and informal marketing groups.

In contrast, the salt bush mutton industry has been managed by the registration of the Salt Bush Dija brand by Red & Beyond. While processors other than those licensed by Red & Beyond are able to market and process salt bush mutton, the high profile launch of the Salt Bush Dija brand has established it as synonymous with the product.

Supply and production

Both goat meat and Salt Bush Dija have faced supply difficulties. In the case of goat meat this has been due to very high demand from the export market. As a result, the limited product sent to the domestic market has often not met the specifications required by that market. Capretto—young goat which is traditionally a by-product of the dairy goat industry—is in particularly short supply. The development of the Chevon product is an attempt by the industry to provide a product that it can more efficiently produce and which has some of the characteristics and uses of Capretto.

The supply of Salt Bush Dija has been a major issue. There have been extensive disruptions to supplies due to changes in organisations involved in the marketing chain. The lack of reliable supplies and the failure of the product to meet market expectations were cited as major obstacles that need to be overcome. While it may be possible to rectify these problems in the future, clearly a lot of goodwill and confidence in the product has been lost as a result of these difficulties.

Skill level within the industries (processing and marketing)

Both goat meat and Salt Bush Dija processing are based on traditional slaughtering practices and therefore have not faced major issues of skill levels or technology. There is some concern by abattoir operators at the relatively high cost per kilo of goat processing. There is a preference by processors for larger animals, while the preference at the retail and consumer levels is for smaller carcases. There are also some difficulties with the production of skin-on goat meat but some large-scale export works have introduced technology to overcome this. Low levels of throughput, due to shortages of supplies, are affecting the financial viability of some export goat processors.

Salt Bush Dija has faced some skill difficulties in the foodservice sector as it has very specific preparation requirements. Some chefs have been disappointed with the product and it is possible that this has been due to incorrect cooking methods. A high level of education of users is probably required to ensure that the product performs acceptably.

[2] Salt Bush Dija is a registered brand name of Red & Beyond

The preparation of goat meat has presented less difficulty when it is cooked in traditional dishes. However, its use in a wider range of dishes, and particularly the use of Capretto and Chevon, will require education of the foodservice sector. Meat and Livestock Australia (MLA) has addressed this by the preparation of a video and other educational material on the preparation of Capretto.

Differentiation in the market and market competitors

Goat meat has a well-established traditional market segment. The differentiation of the product is mainly based on its traditional acceptance and use. This is reinforced by its social significance and the lack of religious barriers to its consumption. The major direct competitors to goat meat are lamb and mutton, which are generally lower priced and less preferred products. Less direct competitors are other meats and fish.

Goat meat faces stronger competition when it moves out of its traditional segment to wider non-traditional areas in the foodservice sector or home preparation. Within the non-traditional areas goat meat is competing not only against game meat and specialist meats but also against beef, lamb and chicken. Goat meat has some characteristics such as low cholesterol and unique flavour which will assist it to capture a share of the non-traditional areas, but its relatively high price in the current market is cited as an impediment to its wider use.

Salt Bush Dija has aimed to differentiate itself from mutton on the basis of flavour, colour and tenderness. This differentiation has not always been successful and some users consider that Salt Bush Dija was just ‘high priced mutton’. Some of these difficulties are probably exacerbated by quality control and lack of correct cooking, but they are very real problems if the market is to be further developed.

Camel will probably face similar difficulties to those of goat meat and Salt Bush Dija in differentiating itself from other meats available. Although there are cultures which traditionally consume camel meat, unlike goat it is often not the preferred product. There are probably greater opportunities to penetrate the foodservice sector, where some chefs and diners are seeking a food that will offer them a unique experience. However, this segment is highly competitive with a range of game meats, specialist meats and seafood, and tastes and fads can change quickly.

Product and pricing strategies

Salt Bush Dija has followed a very tightly controlled product and pricing strategy. The branded product has a very high price relative to the price of the commodity product, mutton.

Goat meat has been a bulk commodity product principally targeted at the export market, with only a small proportion of supplies going to the domestic market. The very high prices available in export markets have provided little incentive to differentiate the product. Recently MLA has been attempting to differentiate Capretto and Chevon as specific types of goat meat targeted at the foodservice sector. With production in other countries such as the US and China rapidly increasing, this strategy is important for maintaining Australia’s position as the world’s major exporter of goat meat. However, the current high world demand may give commercial operators little incentive to pursue this strategy in the short term.

Promotional strategies

Goat meat has received very little promotion on the domestic market. A few promotional items have been prepared by MLA, focused at the export market. These have been targeted at the development of the market for specialist goat meat products such as Capretto, rather than promotion of goat meat as a commodity. Most butchers contacted were aware of goat meat and had no concerns about the lack of promotion as they were not able to satisfy current demand.

Salt Bush Dija has had a very focused promotional program targeted at the foodservice sector. This program was initially very successful and there is a high level of awareness of Salt Bush Dija among chefs. By contrast there is little awareness among butchers or among consumers in general.

Export potential

There is a large export market for goat meat which is expected to drive the industry for the foreseeable future. The development of the domestic market is not seen as a high priority by the major processors, who are focused on exporting. Domestic abattoirs are not particularly interested in processing goat because of the relatively small volumes and the high unit costs per kilo.

Salt Bush Dija is targeting the foodservice sectors in both domestic and export markets. While this has increased the size of its potential market, it may have affected the ability to maintain continuous supplies of a quality product. Recently, there has been a focus on the export market due to the low level and high variability of demand on the domestic market. The adverse experiences of the foodservice sector in Australia with Salt Bush Dija have probably contributed to the difficulties in establishing regular large orders for the product.

VENISON AND KANGAROO

General industry structure and company structure

Company structures in the venison industry have been largely ‘Mum and Dad’ producer-owned, with some of these progressing to the next stage of a greater degree of vertical integration and the addition of external partners either as marketers or distributors. Most of these companies have either disappeared or become general dealers in game or exotic meats, which they claim is necessary for viability.

Kangaroo companies are structured to manage the whole process from utilisation of their share of quota for kangaroo harvesting, through the chain of processing from shooters to chiller box operators, through refrigerated transport to the company-owned and operated processing works producing the final meat products. They usually market and distribute as well, though most also supply other meat or game meat companies.

Selection of the structure of a peak industry body for the camel industry and how it should relate to companies trading within the industry, companies peripheral to it, and government departments and research and development corporations, should be determined based on objectives and desired outcomes. The Kangaroo Industry Association of Australia (KIAA) has an executive structure and membership that are not working to address the identified needs of the industry in areas of major research, improving credibility with government departments, public relations campaigns to improve the industry image, and generic awareness raising programs to assist individual company marketing efforts.

The Deer Industry Association of Australia (DIAA) now has an extremely complex and multi-tiered structure which was an attempt to try to please all of the participants all of the time, and to address the criticisms of the previous structure. As with the kangaroo association, the DIAA appears to work reasonably well in some areas but fails where members have conflicting interests or other agendas. To some extent this will always be problematical, but the camel industry could focus on methods to generate sufficient funds to allow the altruistic motives of the association to be the priority. Generic programs for public relations, promotions and general market and industry development will continue to be of utmost importance to ‘new’ or exotic meat industries.

Supply and production

The supply and production systems for kangaroo offer very little information of benefit to camel since kangaroo supply is abundant and quotas can be adjusted if required. Being field shot and processed in dedicated game facilities, kangaroo also provide a very different model from the one available to camel.

Venison’s experience is more applicable to camel, and the limited supply, delay in response to significant increases in market demand, and difficulties in attracting the interest of appropriate (or any) slaughter and boning premises to do contract kills should be noted by camel suppliers. Venison companies have been hindered by lack of processing and marketing skills within the industry and also within the companies providing contract services. This has often resulted in product which is inappropriate for the market, or which is significantly devalued through incorrect cutting lines or processing procedures. The camel suppliers should carefully monitor customer satisfaction levels to ensure that problems or unacceptable products are addressed quickly.

Skill level within the industries (processing and marketing)
The skill level within the kangaroo industry is generally quite high, with product being successfully processed, boned and marketed for many years. Since kangaroos do not resemble other domestic animals used for meat, processing and marketing have been on a self-taught basis, with changes made to reflect the specifications and preferences of customers. Most kangaroo processors admitted that they still needed to continue to address food safety issues resulting from high microbiological loads, as well as technical problems such as packaging and shelf life, colour stability and tenderness consistency.

Within the venison industry there is disagreement regarding the level of skill, particularly in processing. Some believe they are doing it well, but this view is not always accepted by the companies that market and distribute the product. There is no doubt that methods which do not produce consistent quality product (as defined by the customer) will ultimately result in rejection of the product in the market. The New Zealand deer industry has researched and implemented the necessary changes to enhance the positive effects of electrical stimulation of carcases, dry processing, inverse processing, slower chilling rates of carcases to avoid cold shortening, and denuding all product destined for retail or foodservice. This has been achieved by the use of dedicated deer slaughter and boning facilities. The Australian industry, with its much smaller volumes, is dependent on slaughter and boning operations designed to deal with cattle, sheep and pigs and reluctant to make adaptations to a new species.

These same situations will need to be addressed by the camel industry, which is also dependent on mainstream processing works, although the size of carcases will probably eliminate the need for concern over cold shortening. Horse slaughter facilities have sometimes been used and these could offer advantages in processing skills needed for camel. The venison suppliers and marketers regret that insufficient funds were not available in the early stages of the product life cycle to enable more workshops and training sessions to be conducted with process operators so that they understood the AUS-MEAT venison specifications and product characteristics, particularly as they related to a high value product in the game market.

Careful monitoring of feedback from camel customers regarding consistency and acceptability of the product should indicate if training workshops are a priority for their industry.

Differentiation in the market and market competitors
Differentiation of camel in the market and how it is positioned will be critical to its acceptance and ultimate success in the segments chosen to be targeted. Both kangaroo and venison marketers warn of the difficulties and cost of focusing on the Australian retail market, and this is an important point for camel to consider. It is also apparent that the introduction of any new or different product to the foodservice market requires constant in-market support, particularly in the early stages. Few distribution companies will commit to promotion campaigns unless heavily or totally funded by the supplier, yet camel will need frequent positive media mentions in general consumer as well as trade publications to generate the awareness necessary to initiate trial by the dining public.

The kangaroo and venison industries have found that the hospitality trade is a more controllable market segment to target for supply and distribution of product, particularly if the product is to be supplied fresh, chilled. Marketing research has determined that the majority of chefs prefer this to frozen product.

Surveys have regularly shown that many people prefer to try new or unfamiliar foods in a restaurant situation, rather than chance a possible ruined result at home. Unfortunately, as both kangaroo and venison suppliers noted, the product needs to be in demand by customers before chefs will add it to a menu.

Selecting the retail sector as the primary target market (particularly supermarkets), is more demanding in terms of supply, distribution and shelf life, and unless the product is heavily supported with good quality educational material and general cooking information, it will probably not survive. Venison and kangaroo both report many butchers who no longer stock the product but display signs indicating they will procure to order.

Product and pricing strategies
Product strategies focusing on product description and some of the product technical issues and QA procedures seem to be more advanced for camel at this stage of its product life cycle, than for either venison or kangaroo at a similar stage.

The need for extensive market research in both the domestic and export markets seems to be critical to many decisions that are required to be made by the camel industry, sooner rather than later. While this will undoubtedly be costly, both venison and kangaroo regret that more well designed marketing research was not able to be conducted. Camel needs to investigate if it will change the product name, if it will position itself as a game or an exotic meat, where the best (not necessarily the biggest) export markets are, and whether specific market requirements exist, e.g. halal slaughter.

The pressure on red meat products in the domestic market is already significant, because of the variety of non-meat and white meat or seafood products on offer. Additionally, changing demographics are having a profound effect on consumer buying, cooking and eating habits. Venison and kangaroo marketers all report strong price pressures in all markets as customers seek better value, better quality and more variety in food products. Unfortunately, it is the producers of small volume products who find it most difficult to respond to these demands.

The importance and value of an objective product description system to the whole marketing exercise cannot be denied; however, agrifoods have been relatively slow to adopt such systems. Venison has had a description and specification register since late 1992, kangaroo is just completing its now, and camel has started well by printing its system early in the development phase. Ultimately, the success of the system (how well used it is) will depend on whether the product cutting lines and specification points were customer or industry driven. Particular customers may still demand non-specified cuts and both kangaroo and venison exporters recommend that these new cuts be registered with AQIS and with AUS-MEAT, as the electronic lodgement for Phytosanitary certificates requires a cut number. Where confidentiality exists with regard to customer needs, this registration process can occur privately.

The other industries advise camel marketers to monitor customer satisfaction with and use of the product ordering numbers to ensure that any frustrations are corrected early.

Venison and kangaroo suppliers also advise that many of their problems in both the domestic and export markets have been technical, most often relating to packaging. It is important to select the most appropriate form of packaging for the particular market application and support it with shelf life trials. The other industries admitted to an *ad hoc* approach to this in the early stages, reacting only when a problem arose. In an attempt to gain greater returns than those possible from commodity products, some of the suppliers have tried to pack portion controlled or trimmed product ready for the oven or pan. This has required the use of more expensive and technically challenging packaging methods such as flat or tray skin packs. All packers using this method recommended that camel suppliers avoid the extremely costly loss of product they experienced, by insisting that the equipment companies fund the extensive trials necessary.

Pricing strategies will obviously be determined by a range of circumstances which are different for each species. Kangaroo has low costs for the actual product supply since there are no costs associated with breeding or raising the animal, while for deer the costs are relatively high. The costs of slaughter and boning for venison are also high since almost all deer are processed at mainstream abattoirs and boning rooms that can charge what they like. There are a few exceptions which will be worth observing to see if costs can be significantly reduced: deer are being slaughtered at an ostrich/emu abattoir in Victoria, at an emu works in Queensland and at a new, dedicated deer facility in NSW.

If the whole animal can be sold consistently, rather than occasional orders for less preferred cuts or for co-products, the prices set for the premium cuts can often be more competitive with mainstream meats. Kangaroo premium cuts are already very competitive, so this has proved to be more of a problem for venison. Instead of being able to compete with similar meats, prices for venison frequently put it at the level of crayfish, crab or exotic game birds such as pheasant. Restaurateurs report that it is difficult to sell venison dishes at the same price as their most expensive crayfish item.

Seasonal price variations are accepted to some extent, but ensuring a regular supply of product that consistently meets specifications is the single most important issue. Venison suppliers admit that many of their supply habits have been opportunistic, and a well priced export order has often been accepted to the detriment of the local customer.

Camel marketers would be well advised to seek small, high value customers in a number of overseas markets, as well as the domestic hospitality sector. This would appear to avoid the mistakes made by many venison marketers. Kangaroo is a somewhat different situation, with few lessons for camel.

Promotional strategies

There appears little doubt that camel will need to address many of the same issues in the market as the other new meats. Little has been attempted generically by the KIAA, possibly due to the politics within the group, but individual companies have reported that their public relations campaigns, media events and trade events combined with sales promotions to the trade have been most successful. They believe, as do most venison marketers, that the high cost of major public promotions to encourage wider consumer use is largely beyond their resources. Both industries agreed that a generic campaign would be useful, but all had some difficulty in solving the problem of who would conduct it, who would pay and how. Levies are already imposed to fund National Residue Survey programs and in some cases R&D, and the suggestion of a specific marketing levy was not attractive.

The camel suppliers might also consider their marketing focus, given that camel meat is listed under schedule 2 of the Standing Meat Orders, which also includes beef, veal, goat, horse, farmed venison and donkey. Game meats are listed in a separate schedule that includes kangaroo and wild boar.

Export potential

Throughout the case studies, it is obvious that both kangaroo and venison are primarily export products. This has as much to do with the very small size of the total Australian market (and an even smaller market of identified potential or actual customers for such products), as it does with the longer history and larger size of many of the overseas markets which deal in game or exotic meats.

The total sales of camel meat and camel meat products in Australia currently should be carefully analysed, breaking it down into retail supermarkets, retail butchers or speciality meat suppliers, and the foodservice sector. It would also be useful to look at which cuts or products (sausages, manufactured meats etc.) are sold in each particular area. This should be further segmented into restaurants, cafés, hotels or function or banquet catering. Realistic projections of future sales in all these areas, taking into account the tourism in areas such as Alice Springs, Ayers Rock, Western Australia etc., should indicate whether the supply and demand equation can be balanced.

The relative cost of building the demand in a small but geographically widespread market such as Australia will be high, and must be ongoing. However, if the camel supply will be significant and increasing, the decision to focus on export markets may well be the most appropriate. Further complicating the situation then is the need to slaughter and bone at export facilities, with increased costs of AQIS inspections.

Early discussions and negotiations with the Department of Primary Industries and Energy generally, and AQIS in particular, could help facilitate changes to allow shared container export for smaller orders. This could be useful if processing is carried out at horse abattoirs, which usually dispatch product by chilled air freight to the Belgian and other European markets.

Source: Twyford-Jones & Tume, 1998

Appendix 2—Store audits and wholesale/supermarket data

Table A2 1 Store audit conducted in Alice Springs, 4 and 7 March 1998

Store	Product	Price	Comments
Woolworths—purchase through SA Meats	Camel porterhouse sliced	$12.09/kg (discounted to $2 per pack—pack size 300 to 500 g)	Moderately marbled—tray packed Poorly presented, located next to kangaroo meat which further accentuated its fattiness and poor presentation Woolworths buy primals and cut and package them in store
	Camel pot roast	$14/kg	Shelf label indicating out of stock
	Camel stir fry	$14/kg	Shelf label indicating out of stock
	Camel topside	$7.79/kg	2 steaks per pack—lean appearance—tray pack Woolworths' reported ordering topside only as it's a lean cut, but could end up with any cut depending on availability
	Wild Oz kangaroo mince	$10.19/kg	Vacuum packed—recipe on pack
	Macro Meats—kangaroo mince		Frozen—plastic container
	Macro Meats—kangaroo fillets	$10.19/kg	
	Tasmania Quality Meats—venison, emu, ostrich sausages	Venison $10.49/kg Emu $12.99/kg Ostrich $13.49/kg	
	Crocodile (PNG)	$19.99/kg ($5–7 per tray)	
	Venison mince		Out of stock
	Camel mince		Out of stock
	Camel porterhouse—roasting piece		Vacuum packed, fat lining on outside, significant drip loss in bag Located beside kangaroo mince which further accentuated its poor appearance
Butcher located in same shopping centre as Woolworths	No game meats on display or signs indicating game is sold		Advised can order frozen camel scotch fillet for $12/kg
Bi-Lo	No game meat on display		Advised camel meat not one of their lines
Coles	No camel on display		
	Emu, chicken and beef BBQ packs	$7.99/kg	Tray packs Cottage Meats—Kevron brand

Table A2 2 Store audit conducted in Alice Springs, 18 March 1999

Store	Brand name	Product	Price/pack size	Comments
Woolworths—purchase through SA Meats	Woolworths	Emu sausages	$12.49/kg (250 g)	Polystyrene tray, plastic over-wrap
		Ostrich sausages	$13.49/kg (300 g)	
		Venison sausages	$10.49/kg (300 g)	
		Kangaroo stir-fry	$7.99/kg (400 to 500 g)	NHF tick
	Wild Oz	Kangaroo mince	$9.09/kg (500 g)	Vacuum packed—recipe on pack
		Venison leg steak	$24.39/kg (300 g—$7.66)	All Wild Oz products vacuum packed
		Camel mince	$13.59/kg (500 g)	
		Camel stir fry	$14..59/kg (500 g)	
		Camel pot roast	$13.59/kg (1 kg pack)	
		Emu stir-fry	$19.59/kg (400 g)	
		Venison stir-fry	$24.39/kg (300 g)	
		Emu steak	$16.69/kg (400g)	
		Venison mince	$12.39/kg (500 g)	
	Osmeat Gourmet Ostrich	Ostrich stirfry	$10.19/kg (500g)	
		Ostrich burgers	$14.49/kg (332 g)	
		Ostrich satays	$19.89/kg (270 g)	
		Ostrich steaks	$19.89/kg (454 g)	
		Ostrich roast	$14.49/kg (434 g)	
		Ostrich diced	$10.19/kg (500 g)	
	The Tall Australian	Camel BBQ pack	$9.98 (1 kg)	Black tray with plastic lid, over-wrap with plastic—very unappealing
		Venison BBQ pack	$9.98 (1 kg)	
		Emu BBQ pack	$9.98 (1 kg)	
	Macro Meats Gourmet Game	Kangaroo loin fillets	$10.19/kg (400 g—$4.22)	Polystyrene tray, plastic over-wrap, NHF tick
		Kangaroo BBQ pack	$7.79/kg (782 g marked down to $5.50)	Very unappealing. On 24 March markdown to $3.05. Black tray, plastic over-wrap
		Kangaroo mince	$2.79/kg (on special $2.39/kg—600 g)	Vacuum packed, NHF tick, recipe on front, located next to dog food
		Kangaroo diced	$2.39 (on special $2.39/kg—600 g)	
		Kangaroo mince	$4.89 (2 kg)	
	Mutooroo Meats	Kangaroo mince	No price—(1kg)	Pack premium quality, vacuum pouch, next to dog food
	Territory Jerky	Camel	$2.49 (25 g)	Plastic pack located above meat
Coles	Macro Meats Gourmet Game	Kangaroo burgers	$5.95/kg (394 g)	Black tray, plastic over-wrap
		Kanga bangas	$5.95/kg (400 g)	
		Kanga kebabs	$9.99/kg (400 g)	
		Kangaroo mince	$2.95 (500 g)	Vacuum skin tray
		Kangaroo—sausages, kebabs, chops, burgers,	$7.49/kg (816 g)	Low fat, cholesterol, high protein & iron
	Cottage Meats	Beef	$7.29/kg (625 g)	
		Chicken	$8.29/kg (529 g)	
	Macro Meats	Kangaroo mince	$2.69/kg (600 g)	NHF tick, vacuum packed, next to dog food
		Diced kangaroo	$3.99 (1.2kg)	
		Diced kangaroo	$2.19 (600gm)	

Table A2 3 Store audit - 23 April 1999 at 'Let's Eat' supermarket, Prahran Market

Product	**Price/kg $**
Kangaroo fillets	26.99
Crocodile fillets	54.99
Kangaroo & Provensal herbs	22.99
Crocodile skewers—Asian teriyaki marinade	52.99

Table A2 4 Wholesale prices of game meats in Melbourne, November–December 1997

Respondent	**Status**	**Product**	**Price/kg (wholesale unless otherwise stated)**
Chef	past	Crocodile	$27
		Camel	$24
		Buffalo	$26–$28
		Smoked wallaby	$27
	potential	Emu/Crocodile	$24–$26
		Salt Bush Dija	$30
Butcher	current	Camel striploin and cube roll	$38.95 (retail)
		Camel—sausages	$18.50 (retail)
		Wallaby striploin	$18.50 (retail)
		Ostrich (fan fillet)	$49.99 (retail)
		Emu (fan fillet or denver)	$38.95 (retail)
		Venison	$37.95 (retail)
		Buffalo (scotch fillet and striploin)	$48.50 (retail)
		Kangaroo (striploin)	$18.50 (retail)
Butcher/ wholesaler	past	Camel trim (mix of forequarter and hindquarter)	$3.50 (to be competitive with beef needs to be $2.30)

Source: Warfield & Leech, 1998

Table A2 5 Camel product usage by the trade in Melbourne, November–December 1997

Respondent	Status	Cuts/products used	Cuts/products identified as having potential
Chefs	current	sausages, porterhouse (used in past)	sirloin
	potential		rump, fillets, round steaks
	past (sample only)	smoked loin	fillet
	past	sausages (one-off function)	tenderloin
	past (recently opened new restaurant, used in last restaurant)	clod, striploin	sausages, smallgoods
	past (used when in Ayers Rock)	scotch fillet	sausages
	past (sample only)		prime cuts, steaks
	past	tenderloin	
Butcher	current	porterhouse, striploin, cube roll, sausages	roast, hamburger patties
	past (sample only)	diced, sucuk (Turkish sausage)	mince, roast (lean cuts)
Butcher/ wholesaler	past (sample only)	mixed cuts	trim
Wholesaler	current	porterhouse, rump, scotch fillet, tenderloin, eye fillet, clod, sausages (in order of popularity)	trim to make salami, kabana
	past (18-month-old camel still in freezer)	scotch fillet, eye fillet, blade, rump, topside, feet	all cuts
	past (supply on request)	sirloin, fillet	
Other	potential		porterhouse, fillets, lean cuts
	past (used previous restaurant)		smoked camel

Source: Warfield & Leech, 1998

Table A2 6 Supermarkets' game meat —interviews with Merchandise Managers for Meat, March 1999

Supermarket	State	Game meats past	Game meats present
Woolworths	Qld	Emu, camel, kangaroo—stir fry, diced, schnitzel	Venison steaks, stir fry, racks & roasts, spatchcock, quail, crocodile tails, muscovy, jerky—kangaroo, emu, buffalo
	SA/ NT		Venison, kangaroo, crocodile, BBQ pack camel, primals (cut up in-store), BBQ pack emu & ostrich, game birds
	WA	Venison, emu	None
FAL	WA	Did not know which stores carried game. Stores order direct from suppliers. Those interested in game included Dewsons, Rules and Advantage Supermarkets near Safety Bay	
Coles	Qld	Buffalo, crocodile, emu, venison, camel through Wild Oz	None
	NSW	Goat	Venison, game birds—quail,
	SA/NT		Venison, kangaroo, BBQ packs—camel, buffalo, emu, ostrich
	WA		BBQ packs emu, camel, kangaroo, ostrich
	Vic.		None
Franklins	NSW		Looking at whole category to do monthly promotions of different game—venison, goat, rabbit (this year), kangaroo, crocodile, emu, game birds
	Qld	Ostrich	Kangaroo (fresh & frozen)—sausages, steaks (rump, fillet, topside), diced, stirfry, mince; venison—steak, mince, sausages; crocodile—tail fillets; BBQ pack of game meats (emu steaks, crocodile sausages, kangaroo); quail, spatchcock, peking duck, cornfed chicken
	Vic.		Kangaroo, rabbits, crocodile—looking at whole category
Davids - Foodland	SA		Venison, goat, kangaroo (kebabs, sausages), crocodile; BBQ packs—camel, emu, ostrich
Bi-Lo	Qld	Kangaroo, venison	None

Appendix 3—Camel product list and characteristics

Table A3 1 Camel cuts, products and characteristics

Rump:
Foodservice currently; potential specialist retail & export; chilled or frozen; vac. pack.
Characteristics: lean, moderately tender, some connective tissue between muscles.
Recommended fast, high heat cooking, e.g. grill, pan fry or roast & resting period.
Provided pH is < 5.8, tenderness would improve with ageing in vac. pack.

Porterhouse (striploin):
Foodservice currently; potential specifications retail & export; chilled or frozen; vac. pack.
Characteristics: moderate to heavy marbling, pure white selvedge fat (highly saturated), little connective tissue, tender.
Recommended fast, high heat cooking, e.g. grill, pan fry or roast with resting period.
Tenderness would improve with ageing in vac. pack, but degree of fat cover could inhibit time of ageing.

Round (knuckle):
Manufacturing and foodservice currently; potential pre-tenderised oven-ready roast (retail) or air-dried Bresaola (Italian smallgoods); chilled or frozen; vac. pack.
Characteristics: lean, not naturally tender, some internal connective tissue.
Recommended denuded or netted for slow, low temperature moist cooking method, e.g. oven bag roasting, casserole or curries or cures/marinades prior to air drying.
Tenderness would improve with ageing but not sufficiently to allow fast, dry heat cooking.

Silverside (outside):
Manufactured currently as jerky; potential for retail corned product; eye round muscle potential to cure & smoke; chilled or frozen vac. pack.
Characteristics: lean, some connective tissue, not naturally tender.
Recommended for slow, moist cooking and curing/corning before cooking.

Bolar blade:
No current users of cut identified from distributor; potential as retail and carvery roast; export and domestic; chilled or frozen; vac. pack.
Characteristics : lean muscle, connective tissue throughout, not naturally tender.
Recommended for slow, low temperature, moist cooking to convert collagen to soluble gelatin.
Ageing in bag is less effective than with hindquarter cuts.

Fillet (tenderloin):
Foodservice only currently; high cost & small volume restrict retail except for up-market niche; chilled or frozen; vac. pack.
Characteristics: small, lean, naturally tender muscle with little connective tissue.
Recommended for rapid, high heat cooking such as pan or grill. Ageing in vac. pack will improve tenderness.

Scotch fillet (cube roll):
Foodservice use currently; export potential & specialty retail; chilled or frozen; vac. pack.
Characteristics: moderate marbling, reasonably tender.
Recommended dry heat, rapid cooking as roast or pan fry or grill as steaks. Ageing will improve tenderness.

Topside:
Manufacturing currently; potential retail mince & pre-cooked type products, tenderised minute steaks. Frozen only; vac. pack.
Characteristics: lean (when subcutaneous fat removed), connective tissue surrounding different muscles makes it a difficult cut. Perhaps better seamed out to small sub-primals.
Recommended cooking as a minced product and in manufactured goods.

Chuck tender:
No identified users of this cut; potential for retail if vacuum packed with appropriate seasoning and instructions for long, slow, moist cooking, e.g. as a Moroccan or Turkish roast.
Characteristics: lean but very tendonous cut requiring slow, moist cooking to convert insoluble collagen to soluble gelatin.
Recommended for braising.

Chuck eye roll:
No users of cut identified; potential for retail and foodservice provided it is promoted as a flavoursome braising cut; frozen only; vac. pack.
Characteristics: moderately marbled, connective tissue throughout therefore not naturally tender.
Recommended for slow, moist cooking such as pot roast, curries or stews.

Sausage trim:
Manufacturing only, but product destined for retail smallgoods & barbecue packs, potential for export; frozen only; plastic lined bulk pack.
Characteristics: assorted trimmings from all over carcase; suitable for manufacturing.

90CL boneless camel:
Manufacturing use; potential for added value export product as schnitzel cut for Europe or fermented Turkish smallgoods; frozen only; plastic-lined bulk pack.
Characteristics: assorted small pieces from neck and other lean cut trims; chemical lean content to specification; minimum 100 g pieces if exporting to Europe.
Recommended for various manufacturing uses.

The following cuts are available chilled or frozen:
rump, porterhouse round, silverside, bolar blade, fillet, scotch fillet and topside.

The following cuts are available frozen only:
chuck tender, chuck eye roll, sausage trim, 90CL boneless camel.

Source: CACIA, 1997

Table A3 2 Current and potential product suggestions for camel meat

Existing products	Potential products	Modified products
whole primals vacuum pack/non-shrink	membrane/fat removed, vacuum shrink pack	pre-seasoned/tenderised in vacuum pack
BBQ packs (all trim) sausages, meat balls etc.	up-market packs to include leg medallions	flavour varieties/new shapes, ethnic themes
prosciutto (one wholesaler)	smoked or air dried smallgoods	
jerky (basic hard)	soft jerky for local, Asian market, airport & snack packs fully trimmed, portioned pack	change to freeze drying method processor modify packaging for market requirements
stirfry strips	cubed camel suitable for braised dishes	dry seasoning sachet plus recipe on pack
	commercial doner kebab	
	pre-cooked flame grilled meatballs for supermarket delis & foodservice	
	pre-formed, coated meatloaf, oven ready (supermarkets)	
	canned soups and Arabic style stews; canned meat loaf using brisket, boneless meat for export	

Appendix 4—CACIA price list

Table A4 1 Camel meat prices ex Wyuna Meats (SA), 1998

FROZEN (Boneless camel)	**PRICE/kg**	**W/sale price range ($/kg)**
K040 Rump	8.00	12.50 - 16.00
K050 Porterhouse (striploin)	8.75	14.50 - 18.95
K030 Round (knuckle)	4.70	
K020 Silverside (outside)	4.70	
K071 Roasting (bolar blade)	4.70	9.00
K060 Fillet (tenderloin)	23.00	20.00 - 32.00
K100 Scotch fillet (cube roll)	9.70	12.50 - 16.50
K010 Topside	4.70	12.00
K110 Chuck tender	3.90	
K105 Chuck eye roll	3.90	
K201 Sausage Trim	1.20	3.50
K200 90CL boneless camel	3.50	
CHILLED (Boneless camel)	**PRICE/kg**	**W/sale price range (as for frozen)**
K040 Rump	8.00	
K050 Porterhouse (striploin)	8.75	
K030 Round (knuckle)	4.70	
K020 Silverside (outside)	4.70	
K071 Roasting (bolar blade)	4.70	
L060 Fillet (tenderloin)	23.00	
K100 Scotch fillet (cube roll)	9.75	
K010 Topside	4.70	

Note: Cuts such as brisket, shin, flank steak, thin skirt and thick skirt are not in demand and are placed into the 90CL boneless camel catergory.

Source: Seidel, 1999; Gelati, 1998; Lang, 1999

Appendix 5—Brief for developing branding identity

Background:
The marketing component of RIRDC-funded project DAQ-218A, *To develop an ecological and economically sustainable camel industry through an integrated approach—Queensland,* has produced case studies of competitor meats/industries, trade research and marketing analysis, and finally a marketing plan.

Issues were identified in several areas and strategies suggested to achieve the agreed industry objectives. Lessons learned from marketing and development experiences with other new, alternative or game meats have been noted.

As the camel industry moves closer to a verifiable quality program to ensure consistent product with reliable eating attributes, it will be necessary to mark conforming product at the point of packaging to identify it throughout the distribution chain to the foodservice user.

In addition, an appropriate logo/symbol attached to all media correspondence, price lists, client and government communications will assist with raising awareness of the product and in establishing the positioning within the target market.

Branding objectives:
- To establish the image of camel meat as a desirable alternative on menus, or addition to them.
- To identify a point-of-difference characteristic that can be exploited by public relations campaigns and promotional themes.
- To back up the product with the brand symbol indicating quality and reliability.

The initial branding strategy would be limited to the trade and media sectors, but could later be extended to the consumer at retail level.

Key points to consider in development of the brand and design of the logo:
- Use of any image of a camel should be avoided (because of potential extension of the brand and logo to the retail consumer).
- The preferred positioning statements (from trade market research) need to be taken into account: *camel meat is low in cholesterol and high in protein, with a taste and texture similar to beef,* and *camel is a versatile meat with a mild flavour, suited to the exotic spicing of north African and Middle Eastern cuisines.*
- In the absence of any distinctive points of difference, the emphasis could be on camel's versatility because of its mild, non-gamey flavour—its ability to accept spice and herb flavours without interference from strong meat or game characteristics.
- The important link with the 'Outback experience', as identified from market research, should not be lost sight of. Most tourists express a desire to visit central Australia for this experience but often do not have the time or money to include it in their itinerary. In a typical year 30% of all German tourists visit central Australia, 20% of other Europeans, 12% of Americans, 9% of Japanese and 1% of New Zealanders. This means that most tourists can experience the outback foods and flavours only through cafés, hotels and restaurants in major cities or resorts. A brand and an appropriate symbol that suggest the outback experiences could be very appealing.
- Development of the brand and design of the logo should not be restrictive in the sense that they could not be used for seasonal promotions and specific food events (either ethnic or regional).

Appendix 6—Media list for the camel meat industry

Table A6 1 Media list

Media type	Media	Target market	Page in media guide
TV	Channel 9—'What's Cooking'	Secondary market—fine dining in metropolitan areas	700
	Channel 10—Good Morning Australia, Cooking presenters: Elizabeth Chong and Gabriel Gate	Secondary market—fine dining in metropolitan areas	697
	NTD Channel 8— 7ND Seven Darwin ABD Channel 6 Imparja Television	NT residents/tourists	735
Radio	8HA Radio (Alice Springs) Hot 100 Radio (Darwin) 8CCC (Alice Springs) Top FM (Darwin)	NT residents/tourists	683-685
Newspaper	*Northern Territory News* *Sunday Territorian* *Alice Springs News* *Arafura Times* *Centralian Advocate* *The Darwin/Palmerston Suburban* *Katherine Times* *Litchfield Times* *Palmerston Post* *Tennant & District Times*	NT residents/tourists	204–205
	Turkish Newspapers: *Gunes* (Vic.), *Turkish Report* (Vic), *Yeni Vatan* (NSW), *Zaman* (National)	Primary—Muslims/Turkish market	224
	Australian Islamic Review	Muslims	217
	Persian Herald	Muslims	217
	The Courier Mail	Secondary—Brisbane market/affluent people living in metropolitan areas	148
	Adelaide Advertiser	Secondary—Adelaide affluent people living in metropolitan areas	173
	The Age	Secondary—Melbourne—affluent people living in metropolitan areas	113
	Sydney Morning Herald	Secondary—Sydney affluent fine diners	77
Magazine	*Australian Good Taste*	Secondary target market—distributed nationally through Woolworths	288
	Vogue Entertaining and Travel Guide	Tourists/secondary target market—chefs, affluent fine diners	289
	Australian Gourmet Traveller	Tourists/secondary target market—chefs, affluent fine diners	289

Media type	Media	Target market	Page in media guide
Magazine	In-flight magazines: *Australian Way* (Qantas). *Panorama/Vive* (Ansett) *Spirit* (Qantas) Japan–Australia route) *Travelling Life* (mailed to Diamond, Platinum frequent flyers and Golden Wing Club members	International/domestic tourists secondary target market	307–308
	Food industry trade magazines (*Foodservice Rep, Catering Update*)	Intermediary target market—restaurants, hotels, etc.	440–441
	Hospitality trade magazines (*SA Dining*)	Intermediary target market	449-*452
	Meat industry trade magazines (*Australian Meat Industry Bulletin* and *Meat Industry Digest*)	Meat retailers	463
	Supermarket Plus	Intermediary target market—food retailing and foodservice sectors	499
	Foodweek	Intermediary – Food industry	533
	Supermarket News	Intermediary target market food retailing and foodservice sectors	Not listed
	Retail World	Intermediary target market—food retailing and foodservice sectors	498
	Meatpie Tourist Magazine—Japanese Tourist Guide	Primary—international tourist magazine	379
	Sydney Pocket Passport	Primary—international and domestic tourist market.	381
	Sightseeing South Australia	Primary—international and domestic tourist market	381
	Sydney Tourist Guide	Primary – international tourist/high socioeconomic group	382
	TNT Outback edition	Primary—international tourists (backpackers)	383
	The Harbour Connection	Primary—international tourists and domestic tourists	378
	This Week in Darwin	Primary—international and domestic tourists	382
	Corporate Traveller	Secondary—domestic high socioeconomic group	377
	Backpacker Essentials	Primary – international tourists(backpackers)	376
	Aussie Backpacker	Primary —international and domestic tourists (backpackers)	375
	Oz Adventure Magazine	International and domestic backpackers	380
Internet/book	*Lonely Planet Guide—Australia*	Primary—international tourists	Not listed

Source: *Margaret Gee's Media Guide*, November 1998–March 1999

Appendix 7—Cervena report

cervena report

APRIL 1994

Cervena a Success in the Market

Nearly a year down the track, Cervena sales have exceeded objectives

◆ US export value grew by 39 percent and volume grew by 37 percent (year to February 1994).
◆ USA exports hit $10 million for the first time
◆ The "million dollars per month" milestone was reached, the first time ever, and then repeated over four consecutive months
◆ Greater value than volume growth is the most significant achievement: increasing real returns to New Zealand is the over-riding aim of the marketing strategy
◆ Mexico has just been added to the Cervena™ markets as a result of the NAFTA free trade agreement with Canada and the USA

Cervena Success Overshadowed

"Cervena's first year achievements are exceptional, but overshadowed by other industry difficulties", says Cervena Co Chairman Terry Shagin ."That is disappointing, because the results are significant:
◆ It is possible to increase sales volumes into higher value markets without sacrificing prices
◆ The results prove that the strategy works in practice
"Last year's European venison markets show just how essential the Cervena strategy is to diversify our markets":
◆ European prices collapsed last year under the pressure of over-supply from large stocks of frozen New Zealand venison
◆ Commodity markets can take the New Zealand industry down with them
◆ US market prices held firm as a result of the franchise discipline: exporters could not just switch unsold product from the unprofitable European market into the USA, which would have collapsed those prices as well
◆ Even with increased volumes, the USA still only accounts for less than 10 percent of total export value, and returns from a market that size can't yet outweigh the impact of poor profitability in more traditional markets

Cervena has started well and made an impact, but this result has been overshadowed

High Impact with Target Audiences

"Cervena's marketing budget is small by international standards, (the US Beef Council spends US$40 million a year on advertising alone), but we've achieved great results" says Heather Ware, Venison Marketing Manager.

We concentrated on public relations rather than advertising: partly for budget reasons, and partly because we initially targeted leading chefs and foodwriters rather than consumers. Our aim was to get more restaurants serving Cervena.

It worked. Leading American food magazines were quick to pick up on this new "hot item".

Our secondary approach was aimed at increasing demand from restaurant customers. We tied PR coverage to restaurants featuring Cervena. Including a 1-800 phone number of a Cervena supplier with a magazine article is very effective in making the transition from "that sounds nice" to an "I'll buy that" home buyer.

Highlights include:
◆ Media exposure from the first year's PR programme was valued at the equivalent of an US$820,000 (NZ$1.4 million) advertising campaign. Editorial coverage is also generally considered more "truthful" than advertising

Charles Palmer serves Cervena Giant chops to a New York Giants gridiron player

cervena co
PO BOX 10702 5-7 WILLESTON STREET WELLINGTON NEW ZEALAND TELEPHONE +64-4 473-8330 FAX +64-4 473-8355

◆ The Cervena message reached an estimated 40 million Americans
◆ *Gourmet* magazine recommended venison for its 1993 Christmas dinner to its 800,000 readers, saying "We used venison from New Zealand, marketed as Cervena, which we enjoyed for its tenderness and mild flavor."
◆ Importantly, *Gourmet* included the toll-free 1-800 number for Cervena suppliers
◆ *Nation's Restaurant News* goes to 97,000 trade people and chefs weekly and featured venison as a "hot hit of 1993"
◆ Chef spokesman Charles Palmer cooked Cervena on the Julia Childs Great Chefs cable television show
◆ Prominent gridiron team the New York Giants were featured on CBS television and in *USA Today* enjoying Cervena as part of their fitness and nutrition programme.

Raising awareness among key audiences, cost-effectively, is essential in creating a preference for Cervena over alternatives. A premium price in the market will be earned only after establishing that loyalty. Cervena has started strongly.

Chefs Endorse Cervena

Gaining acceptance and support from high profile chefs was essential to the Cervena's success. Top chefs attract publicity, and influence other chefs, restaurant diners and home cooks.
◆ I added Warm Cervena Salad to my summer menu – it accounted for 30 percent of main course sales and diners love it"
Charles Palmer, Chef/Owner, Aureoles, New York
◆ Cervena is surprisingly unlike game meats of old. It doesn't have that characteristically gamey flavor. It's very tender."
Paul Clark, Editor, Chef magazine
◆ "Cervena has a very delicate flavor that is clean on the palate. Customers love the fresh clean flavors of our food at Elka and Cervena is a perfect complement."
Elka Gilmore, Chef, Elka, San Francisco

DISTRIBUTOR SUPPORT

The face of the programme to our restaurant customers is the US based distributor sales force. Working with franchisee exporters, the distributors' success largely determines the programme's success.

Polarica (Game) Inc. imports and distributes Game Meats' Cervena, with offices in San Francisco and New York. Owner Mitch Niayesh sees a great future:
◆ "Sales increased by 60 percent in volume last year, with a further doubling next year expected as demand strengthens
◆ "This growth has come mostly from new customers, restaurants which previously did not serve venison"
◆ Spring and summer sales were well up, and Mitch Niayesh sees benefits for farmers, exporters and chefs alike through a more secure year round business

D'Artagnan Inc. is based in New Jersey, and imports and distributes Mair Venison's Cervena. George Faison is President and co-owner.
◆ "We ran a Cervena Ski Contest to create a larger market for previously under-utilised selections of venison (ie leg cuts) and to promote stronger name recognition for Cervena
◆ Cervena Co's involvement allowed me to add more signage and press coverage than I could have done alone"
Mair Venison confirm that sales of leg cuts are running well ahead of last season since the incentive programme.

The Cervena programme supports and motivates distributors' sales teams with strong back-up material. They believe both they and their New Zealand suppliers will sell more product, without sacrificing price, with the Cervena brand than without it.

OBJECTIVES (APRIL 1993)	ACHIEVEMENTS (APRIL 1994)
◆ Increase volume sales 20 percent to USA	◆ 37 percent increase in volume to USA
◆ Maintain market prices	◆ Market prices maintained
◆ Exports (year to February 1993) • 570 tonnes • $8.3 million	◆ Exports (year to February 1994) • 782 tonnes • $11.5 million
◆ Increase US share of total venison exports • 4.4 percent of volume • 6.9 percent of value	◆ Exports to US as share of total exports increased • 5.3 percent of volume • 8.9 percent of value
◆ Establish Cervena™ Natural Tender Venison brand	◆ Press coverage reached 40 million Americans • known by 86 percent of New Zealand chefs

Cervena at Home

The New Zealand venison market was estimated at about 325 tonnes in early 1994, a 30 percent increase over the previous year. This makes it a significant market in its own right, as well as an excellent test market

◆ Concentrating on the restaurant market is highly cost-effective, as trained chefs serve innovative venison dishes year round for a wide variety of diners

◆ Tourists looking for local delicacies in restaurants represent a rapidly expanding and high value market

WELL AWARE

Part of refining the programme is checking on levels of awareness and understanding. In January 1994 a chef survey showed:

◆ 86 percent knew the Cervena name (compared with 69 percent six months earlier)

◆ Over half used Cervena all the time, named on the menu; while in the earlier survey less than 40 percent used it all the time and only 9 percent identified it as Cervena

CERVENA PLATES 1993

The Cervena Plates competition was a huge success:

◆ The participating restaurants reported a great response, many diners eating Cervena for the first time

◆ Cervena sales doubled during the competition period

◆ The competition attracted high media exposure and very positive feedback from chefs

◆ The competition (tested and refined here) will be transferred to the USA market during 1994, and is likely to be run again in New Zealand in 1995

◆ Christchurch chef Rick Rutledge-Manning and assistant chef Bruce Dobson, from The Club, won the 1993 Cervena Plates Award.

Bruce Dobson (left), Chef Graham Brown (centre) and Rick Rutledge-Manning (right)

WHY CAN'T I BUY CERVENA IN THE SHOPS?

◆ Cervena is great when it is cooked properly. But it is an unforgiving meat

◆ The risk of over-cooking, and therefore ruining, Cervena is high for someone unfamiliar with it, who is then unlikely ever to buy it again. Education about cooking Cervena is expensive but essential for long term success at retail level

◆ There are technical issues about packaging and shelf life to be resolved, as well as training butchers in handling and cut styles

We are moving towards offering Cervena in selected stores. To do the product justice it must be professionally presented to potential customers, with significant educational support to ensure good butchery, presentation and cooking.

Development of the retail market internationally and in New Zealand will be undertaken systematically.

Recently, consumer trials at up-market butchers in Wellington and Christchurch, provided useful insights:

◆ Awareness of Cervena, or even of cooking farmed venison, by shoppers was very low although "foodies" knew about it from Cuisine magazine and restaurants

◆ Few shoppers had tasted farmed venison before but almost all loved it

WHAT HAS THE PROGRAMME COST?

The dual marketing strategy covers both the Cervena brand and the ZEAL quality mark programmes.

◆ Development

Total NZGIB investment to September 1992, which covered extensive market research, brand development and registration to protect both the Cervena™ brand and ZEAL™ quality mark, totalled $1.9 million.

◆ Launch year

In 1992/93 the marketing focus led up to the Cervena launch, production of promotional materials and the first six months of in-market activity. Total Cervena Co expenditure was $3.9 million. Direct expenditure on the ZEAL programme, which covers venison marketing in all non-Cervena markets, totalled $1.2 million.

◆ Current year

For the 1993/94 year, total Cervena expenditure will be $3.1 million and ZEAL $1.0 million. A higher proportion of the budget in this second year will be spent on joint merchandising activities. This means that these funds are further boosted by franchisee and distributor contributions, and target specific sales opportunities rather than Cervena brand awareness alone.

Appendix 8—Detailed competitor grid

Table A8 1 Detailed competitive assessment of game meats

Competitive factor	**Camel**[3]	**Venison**[4]	**Crocodile**[5]	**Kangaroo**[6]	**Ostrich**[7]	**Emu**[8]	**Buffalo**[9]	**Goat**[10]
Industry								
Production costs	• Feral—nil • Ranched—$289 (equal to steer of slaughter weight 340 kg)	• farmed • fallow $60–75/head • red $180–200/head	• farmed • not available	• wild supply • nil	• farmed • $200–250 (95–100 kg bird)	• farmed • $140 (45 kg bird)	• not available—similar to beef • feral—nil	• feral moving to farmed • feral—nil • $17.24/head—farmed
Processing costs	• $174 (slaughter, boning, packaging) • High transport costs to abattoir in SA ($105 per camel)	• $80–120 (includes slaughter, boning, chiller, packaging) ($40– 80 also reported as processing cost by another source)	• $25 per crocodile (including transport)	• $19.50–25 per kangaroo (harvesting $10, chiller box $1, processing—boning, packaging $8.50–14) based on 10kg meat recovery	• $85–115 per bird slaughtering, boning, packaging costs • transport costs $10–70 per bird	• slaughtering, boning, packaging costs $70–80 per bird representing 40–50% total production costs • transport costs on average $20 per bird	• $55 per head (Darwin for slaughter) • $70/head boned and packed • transport costs $10–25/head (depending on distance and number)	• $10–12.50/head (slaughter, dressed carcase weight & boxing) • transport costs to abattoir—feral and farmed $3/head (700 km road train) • skin-on similar processing cost to sheep

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3 Seidel, 1999; Tume, 1999
4 Tuckwell, 1998; Tume, 1999
5 Peucker, 1998
6 Switala, 1998
7 English, 1999
8 O'Malley, 1998; Evans, 1999
9 Lemcke, 1998
10 Kellaway, 1999; Miller, 1998a

Competitive factor	Camel[11]	Venison[12]	Crocodile[13]	Kangaroo[14]	Ostrich[15]	Emu[16]	Buffalo[17]	Goat[18]
Industry								
Availability & access to stock	• feral stock of 250 000 with 2 000 camels ranched • distribution of feral stock is 50% in WA, 27% in NT, 23% in Qld and SA • slaughter numbers: 1995—254 1996—347 1997—295 1998—324	• 185 000 herd in 1997 • decreasing national herd size 96–97 and 97–98 (however stable herd size also reported) • slaughter numbers: 1996–97– 32 000 1997–98 – 30 000 • Lower supply in winter	• 63 500 salt & fresh water crocodiles on farms in Australia in 1996 • supply related to skin market • producers maintaining levels of production • skin prices are currently low	• quota between 5.2 and 3.6 million. Harvest around 3 million each year • stable supply as commercial harvests at present below quota levels	• 120 000 ostriches in 1997 • decline in farm numbers but increase in birds per farm • slaughter numbers: 1996–1 000 1997–4-5 000 1998–12-15 000 1999–30 000 (projected)	• 118 300 birds in 1996–97 • declining stock last 2 years • slaughter numbers: 1999 – 6 000 (forecast) • seasonal supply, fresh meat only available 8 months of the year	• 30–50 000 head including 20–30 000 feral stock in 1997 • increasing farmed herd size • 700 head live export, 1 500 head slaughtered domestic and export in 1997	• 2.6 million feral herd in 1996 • farmed herd stock of improved Boer and crossbred improved Boer of more than • 10 000 by end 1997 • declining feral stock—inconsistent supply major problem for industry • slaughter numbers: 1994—997 300 1995—701 000 1996—693 900

[11] Seidel, 1999
[12] Tume,1999, Sinclair, 1998; Tuckwell, 1998
[13] Peucker, 1998
[14] AQIS, 1998
[15] English, 1999
[16] ABS, 1998; O'Malley, 1998,
[17] McInnes, 1999; Lemcke, 1998
[18] Kellaway, 1999; Twyford-Jones, 1998; Miller, 1998a

Competitive factor	Camel	Venison	Crocodile	Kangaroo	Ostrich	Emu	Buffalo	Goat
Industry								
Access to processing facilities[19]	• access to one domestic multi-species abattoir in SA • no export abattoir • abattoirs reluctant to process due to small numbers	• multi-species export abattoirs reluctant to process due to small volume—high cost, reduced tally & contamination • insufficient access to export abattoirs with EU accreditation particularly in Qld. Multi-species EU-accredited abattoirs in SA & WA. 16 export establishments slaughtering deer—2 WA, 2 NSW, 7 SA, 3 Vic., 2 Qld • 3 dedicated export deer abattoirs NSW, Vic, SA	• dedicated crocodile export-accredited premises in Qld and NT • 7 export processing establishments —4 Qld, 2 NT, 1 WA • in Qld only two farms harvest crocodile for meat	• kangaroo companies own premises for boning and slicing • 21 establishments licensed to process kangaroo, 11 export-registered	• 10 export premises slaughtering ostriches and emus—1 WA, 2 Qld, 5 Vic., 1 NSW, 1 SA	• 10 export premises slaughtering ostriches and emus—1 WA, 2 Qld, 5 Vic, 1 NSW, 1 SA; many premises diversifying into other game meat e.g. goat, venison	• 3 export premises slaughtering buffalo—1 NT, 1 SA, 1 Vic.	• 30 export premises slaughtering goat—6 Qld, 4 WA, 6 NSW, 6 Vic., 8 SA • 2 dedicated goat processing facilities in NSW—Broken Hill Exports, Bourke Abattoirs

[19] AQIS, 1999

Competitive factor	**Camel**	**Venison**	**Crocodile**	**Kangaroo**	**Ostrich**	**Emu**	**Buffalo**	**Goat**
Industry								
Vertical integration	• integrated production & promotion • no control over processing / distribution	• some producer cooperatives in Victoria; NSW network alliances among producer groups; Qld producers & vendors in trust set-up & lease of Cherbourg abattoir • some producers export or are game meat dealers • some industry selling, distributing, value adding • 15 groups selling venison nationally and internationally	• some producers integrated production, processing, marketing & distribution	• processors undertake marketing, exporting & some distribution • approx 20 processors for human consumption	• many producers integrated by AOA and AOC until AOC collapse in 1998 • similar to emus—some small producer groups formed and attempting own marketing • rapid integration by 3–4 groups (processing, production & marketing)	• highly fragmented industry with many groups marketing emu meat • in WA and other states some cooperatives vertically integrated and undertaking own marketing • located in Victoria are the Emu Industry Development Committee and marketing company Emu Industries Ltd which manages a producer levy	• Buffalo Industry Council distributes meat to wholesalers as do other state councils • live & processed exports out of Darwin • Buffalo Industry Council involved in production & arranging supply to nominated wholesalers	• processors mainly control the export & domestic sale of goat meat (some processors also breeding stock) • some producers in Qld are moving into processing, selling & distribution

Competitive factor	**Camel**	**Venison**	**Crocodile**	**Kangaroo**	**Ostrich**	**Emu**	**Buffalo**	**Goat**
Industry								
Early entrant to category	• entered domestic market commercially in 1980 • entered live export market in 1985 • no access to processed export market	• entered domestic market commercially in 1982 • entered live export market in early 1990 • entered processed export market in 1980s • industry does not perceive it competes in the game meat category but as a mainstream alternative	• entered domestic market in 1980s • entered processed export market in 1990	• entered domestic market commercially in 1980 – (SA), 1992 – (NT, SA, Tas., ACT), 1993 (NSW, Qld, Vic, WA) • no live exports • processed meat export market commenced in 1959, suspended in the late 1960s and recommenced in 1980	• entered export markets commercially in 1997 • small amounts at present sold in domestic market	• entered domestic and export markets commercially in 1991	• entered domestic early 1960's export in 1974 • late 80s Tenderbuff registered	• entered export meat market in 1950s • live exports in 1980s • domestic market small quantities since 1940s • not considered game by traditional ethnic consumers

Competitive factor	**Camel**	**Venison**	**Crocodile**	**Kangaroo**	**Ostrich**	**Emu**	**Buffalo**	**Goat**
Industry								
Strategic direction/goals	• CACIA-developed business & strategic plan not actively used • RIRDC funding development of marketing plan for industry • CACIA sales focus	• significant planning at industry level through funding by RIRDC & deer levy but not by individual operators • individual groups/ companies mostly have sales focus	• planning at a national level only partially influences direction of individual operators. There are some planning alliances, e.g. regional basis • industry has no business plan • farms do their own marketing • individual groups/ companies mostly have sales focus	• planning at a national level only partially influences direction of individual operators. There are some planning alliances, e.g. regional basis • individual groups/ companies mostly have sales focus	• AOC did some business planning, but since its collapse only fragmented regional planning • localised groups • individual groups/ companies mostly have sales focus	• planning at a national level only partially influences direction of individual operators. There are some planning alliances, e.g. regional basis • Emu Vertica (WA company) undertook business planning • EIDC in Qld has strategic direction but no funding support to implement • individual groups/ companies mostly have sales focus	• RIRDC funding market analysis for industry group • Individual groups/ companies mostly have sales focus	• MLA planning, some planning by individual operators • state Ag Depts supporting breeding programs & some market research • processors mostly have sales focus

Competitive factor	**Camel**	**Venison**	**Crocodile**	**Kangaroo**	**Ostrich**	**Emu**	**Buffalo**	**Goat**
Industry								
Actual product quality	• inconsistent quality in terms of fat, tenderness, presentation • carcase description language published in 1997, QA procedures being developed for on-farm to abattoir, no QA for processing	• inconsistent quality in terms of tenderness, presentation & packaging • AUSMEAT carcase language—voluntary only • NZ venison reputation for better quality & consistency • QA—on-farm & transport – completed 1998; some implementation	• carcase description language • sensory evaluation found croc. to be of good tenderness & better than PNG meat • QA program—Australian Code of Practice for Veterinary Public Health: Crocodile Meat for Human Consumption	• specifications and selected cuts (carcase description language) published RIRDC/AUS-MEAT in 1998 • industry QA but company QA programs • industry codes of practice and hygiene regulations mandatory	• inconsistent quality • QA programs are being developed; not in place • meat language developed by AOC/RIRDC • industry code of practice in place	• inconsistent quality (age and condition related farmers retaining stock too long) • QA partly prepared, not in use • cuts booklet developed and used	• Tenderbuff has strict quality specifications • product quality better during some seasons, year-round supplies only achieved since 1996 • AUS-MEAT-approved abattoir • industry carcase description language, but standards for Tenderbuff	• inconsistent quality of feral stock • developing carcase description language • no QA prior to processing

Competitive factors	**Camel**	**Venison**	**Crocodile**	**Kangaroo**	**Ostrich**	**Emu**	**Buffalo**	**Goat**
Industry								
Financial resources	• RIRDC and R&D 1997–98 $105 000, 1998–99 $60 000 • Funding sources NTDPIF, DPI Qld, RIRDC • NTDPIF $10 000 97–98, 98–99 for marketing	• RIRDC and R&D 1997–98 $350 000, 1998–99 $270 000 • funding sources RIRDC, industry levy, DPI Qld	• RIRDC and R&D 1997–98 $135 000, 1998–99 $160 000 • funding support by RIRDC, DPI Qld, NTDPIF	• RIRDC and R&D 1997–98 $35 000, 1998–99 $10 000 • funding R&D support from RIRDC • KIAA funding support from Aus Industry DIST • mostly private funding	• RIRDC and R&D 1997–98 $130 000, 1998–99 $100 000	• RIRDC and R&D 1997–98 $140 000, 1998–99 $100 000 • RIRDC funding—no industry levy • very limited private resources	• RIRDC and R&D 1997–98 $70 000, 1998–99 $80 000 • RIRDC funding plus industry levy • NT govt support BIC Exec. Officer	• Industry- level & MLA support • $300 000 R&D and promotion 1997–98, predicted to increase

Competitive factor	Camel	Venison	Crocodile	Kangaroo	Ostrich	Emu	Buffalo	Goat
Industry								
Personnel /management								
Business skills	• one person marketing/ processing for industry	• production orientation • individual operators undertaking marketing, processing • industry level one person (Deer Industry Development Manager); focus on production & processing	• individual operators undertaking marketing and processing	• KIAA & Exec. officer & AGPA members address industry matters • individual companies marketing • long history of export business; less domestic expertise	• collapse of AOC has meant increasing reliance on marketing & export alliances and some ability in business skills is evident • producer groups are forming and trying to undertake own marketing on regional level • larger private companies focusing on export; smaller producer groups selling small amounts regionally	• limited business acumen at industry level • producers and commercial investors undertaking marketing activities	• Exec. Officer works part-time for industry • individual companies marketing export	• marketing weak mainly due to insufficient supply • problems in coordinating supply effectively

Competitive factor	**Camel**	**Venison**	**Crocodile**	**Kangaroo**	**Ostrich**	**Emu**	**Buffalo**	**Goat**
Industry								
Personnel /management								
Technical skills	• CACIA Executive Officer has strong processing knowledge	• weaknesses in processing, packaging • state Ag. Departments' Deer Industry Officers focus on production & processing issues, not marketing • poor technical product knowledge	• reasonable production & marketing base	• strong in harvesting & process skills • technology well used—automated skinning of primals • self-testing labs	• good meat processing skills • some state agriculture depts (SA, Vic., Qld) supported production development	• good production base supported by some state Ag depts (WA initially (not now), SA, Vic., Qld, Tas.) • limited processing skills	• DPIF officer works on buffalo 60% of time	• strong processing skills—long export history • lack of product knowledge in industry • insufficient information & research in breeding & feeding

Competitive factor	**Camel**	**Venison**	**Crocodile**	**Kangaroo**	**Ostrich**	**Emu**	**Buffalo**	**Goat**
Marketing								
Product quality reputation	• inconsistent quality (tenderness, presentation, fattiness, packaging) between & within cuts—some good experiences, others negative	• inconsistent quality (tenderness, packaging, presentation); better than other game • NZ venison considered better quality	• good quality • PNG croc. meat was considered equal in quality to Australian croc. meat by chefs surveyed in 1993. However anecdotal evidence suggests this is no longer the case	• good quality in terms of tenderness, presentation, packaging	• inconsistent – problems in demand for trim • some export clients—reported preference for Australian ostrich over South African ostrich in European markets	• inconsistent/ variable • considered well trimmed, no waste • problems in demand for all cuts	• consistent and good quality if traded as Tenderbuff spec. Older cull animals inconsistent and can be of low quality	• inconsistent—however mainly used in wet dishes

Competitive factor	**Camel**	**Venison**	**Crocodile**	**Kangaroo**	**Ostrich**	**Emu**	**Buffalo**	**Goat**
Marketing								
Product characteristics/ differentiation	• inconsistency in visual fat within & between cuts and tenderness • care in cooking • light red meat • white fat • low cholesterol/ high protein • novel/unusual • similar texture/taste to beef • traditionally consumed in certain Muslim countries but not the preferred meat • associated with outback Australia • chilled & frozen—wholesalers in WA & Vic. will only sell frozen product • feral stock—lack of control over product quality & supply • NHF tick (all cuts except striploin & sausage trim)	• inconsistency in tenderness, but less than most game • dark red meat • high in iron, low cholesterol/low fat • care in cooking • farmed • history of English, other European, Asian and Nth Amercian consumption • available chilled & frozen, & halal • like kangaroo, considered more mainstream than other game meats • NHF tick (in past, not current)	• low fat • high omega 6 fatty acids • care in cooking • white meat • bland tasting • only available frozen • considered novel • farmed	• generally consistent tenderness • high iron, low fat & cholesterol • dark red meat • available chilled & frozen • care in cooking • wild-shot • considered more mainstream than other game meats by trade • NHF tick	• inconsistent tenderness • dark red meat • low fat/ cholesterol, high iron and protein • farmed • care in cooking • NHF tick • available chilled & frozen • good properties for use in smallgoods	• inconsistent tenderness • dark red meat • low fat/ cholesterol, high iron • farmed • available chilled & frozen • care in cooking • good properties for use in smallgoods	• tenderness & cuts similar to beef • similar taste & texture to beef • medium red meat • mild flavour • low fat & cholesterol (compared to traditional meats) • farmed • available chilled & frozen	• inconsistent tenderness • preferred red meat by many ethnic groups—has religious & cultural significance • sold chilled & frozen, halal • low fat & cholesterol • developing high value products Capretto & Chevon • skin-on, skin-off, bone-in and bone out cuts produced to satisfy different markets • feral—lack of control over product quality & supply

Competitive factor	Camel	Venison	Crocodile	Kangaroo	Ostrich	Emu	Buffalo	Goat
Marketing								
Branding recognition	• no brands	• limited branding at trade or consumer level, limited awareness • industry developing brand related to QA (from farm to customer) for export and domestic use • some companies packaging a range of game meats at retail level; however little consumer awareness, e.g. Wild Oz	• no branding • individual farm packaging	• branding at consumer & trade level by some companies (e.g. Macro Meats & Southern Game Meats). High trade awareness limited consumer awareness, of some brands	• limited branding at trade level – by some larger companies • limited awareness by trade	• limited branding & awareness	• branding at trade level—Tenderbuff. limited awareness amongst hotel trade gaining acceptance in Darwin where supply consistent over last 4-5 years	• Branding by MLA to food service in Asia & Australia including Capretto, and Chevon

Competitive factor	Camel	Venison	Crocodile	Kangaroo	Ostrich	Emu	Buffalo	Goat
Marketing								
Customer orientation/ market intelligence	• consumer research undertaken, RIRDC funding marketing research and plan	• consumer & trade research conducted in mid 1990s by RIRDC • little market research by individual operators	• consumer & trade research conducted in early 1990s by RIRDC • no research by individual operators	• RIRDC funded consumer research late 1990s • little market research by individual operators • large operators have good understanding of trade needs	• no industry market research available • limited international marketing • limited funds available for market research	• no industry market research available • no timely industry investment in market development but funds were invested in QA	• RIRDC funding market research conducted with industry	• MLA has undertaken overseas market research; good understanding of market segments, product specifications • limited domestic market research

Competitive factor	Camel	Venison	Crocodile	Kangaroo	Ostrich	Emu	Buffalo	Goat
Marketing								
Customer awareness/ knowledge	• no consumer awareness/ knowledge • trade has very limited knowledge awareness of cuts, shelf life, distribution network, quality	• high awareness but limited knowledge by consumers • high awareness of Australian venison by European importers but low by trade & consumers • Australian venison established as clean & green in Europe • domestic trade has good knowledge of cuts, shelf life, distribution, quality	• limited consumer awareness/ knowledge • trade has very limited knowledge awareness of cuts, shelf life, distribution network, quality	• some consumer knowledge & awareness • previously trade confusion about cut names, now addressed through RIRDC/ AUS-MEAT carcase language • trade has good knowledge of shelf life, distribution, quality	• limited consumer awareness & knowledge • trade has very limited knowledge awareness of cuts, shelf life, distribution network, quality	• limited consumer awareness & knowledge • trade has very limited knowledge awareness of cuts, shelf life, distribution network, quality	• limited consumer awareness & knowledge • trade has very limited knowledge awareness of cuts, shelf life, distribution network, quality • high level of substitution for beef in southern markets	• high awareness in some ethnic segments by consumers & trade • low general awareness by consumers & trade • high awareness of goat meat in some export markets but not necessarily of Australian goat meat exports

Competitive factor	Camel[20]	Venison[21]	Crocodile[22]	Kangaroo[23]	Ostrich[24]	Emu[25]	Buffalo[26]	Goat[27]
Marketing								
Segmentation/ focus	• live exports to Middle East • Domestic tourist market (hotels/rests., supermarkets, tourist attractions) small amount other hotels/ restaurants, game butchers • potential (halal —export & domestic), trim smallgoods in Europe • little variation in product offering – exclusion from some potential segments due to lack of access to export premises • domestic meat focus (100%), mainly tourists	• exported to Europe & Asia (trim & top cuts & halal) • domestic up-market restaurants & hotels, specialist game butchers/ retailers, supermarkets in limited locations • domestic: mainly up-market restaurants • export meat focus (70–80% of production)	• export markets UK, other Europe, Asia, New Zealand • domestic tourist market—hotel restaurants, supermarkets in limited locations • domestic meat focus (83%) mainly tourists (17%) export	• export to Europe (Netherlands, Belgium, Luxembourg, France, UK, Austria, Czech Republic and Germany) mainly trim for smallgoods • domestic tourist market – hotels/rests. • mainstream restaurants & hotels • supermarkets in limited locations • domestic up-market & casual restaurants & cafés • export meat focus (68%); 32% domestic	• live exports to Korea, Japan, Thailand • in 1998 main export markets Netherlands, France, Germany, Bulgaria, Japan, Singapore • export of fillets steaks to Switzerland, France, Holland, trim to Germany for smallgoods • domestic limited—some hotels, restaurants, supermkts • export meat focus (95–98% of production)	• main export markets in 1998 were China, Malaysia, Reunion • domestically – up-market restaurants, some supermarkets • export meat focus (73%); 27% domestic	• live exports of 800 to Brunei for halal slaughter for fresh meat and 400 to Malaysia in 1998 (total value $360 000) • meat exports (mainly for smallgoods production) 80 tonnes ($160 000) in 1998 • domestic tourist market: hotels/rest particularly northern states —24 tonnes ($50 000) in 1998 • live export breeder supply mainly SE Asia • export focused (80%)	• export skin-off (mostly frozen, some chilled)—Malaysia, Singapore, Caribbean, United States; skin-on (frozen)—Taiwan, Korea • export & domestic (halal) bone-in—United States • domestic hotels/rests.—bone-out cuts • live export to Korea • domestic mainly Muslim market • export focused (90% of production)

[20] Seidel, 1999
[21] Tuckwell, 1998; Tume, 1999; ABS, 1999
[22] Environment Australia, 1999; Peucker, 1998
[23] ABS, 1999
[24] McKinna, 1999; English, 1999
[25] Environment Australia, 1999; Evans, 1999
[26] McInnes, 1999; Lemcke, 1998
[27] Kellaway, 1999; Miller, 1998b

Competitive factor	**Camel**	**Venison**	**Crocodile**	**Kangaroo**	**Ostrich**	**Emu**	**Buffalo**	**Goat**
Marketing								
Domestic distribution	• ownership of camel meat retained by CACIA until sold by national distributor—pays for slaughter, processing & storage costs until sold • all meat goes through a national distributor in SA and then redistributed • sold mainly to game meat distributors who on-sell to a small number of hotels/ restaurants, meat re-packers, supermarkets	• several groups, wholesalers trading venison domestically & export • sold mainly by game meat distributors to hotels & restaurants • sold by producer wholesalers to export markets	• produced & slaughtered in domestic & export abattoirs on-farm • sold to game meat distributors who sell to restaurants/ hotels or export • Qld meat sold through Australian Crocodile Traders, occasionally Woolworths • PNG croc. imported to Australia through Byrnes Meats	• distributed by kangaroo meat companies to game & mainstream meat wholesalers who on-sell to restaurant/ hotel sector • some kangaroo meat companies distribute direct to supermarkets and export	• some wholesalers are now involved but mainly the larger commercial companies are undertaking own distribution & marketing • wholesaler awareness of where to access, as well as bad experiences; few distributing	• wholesalers contract processors to slaughter emu sell direct to restaurants, overseas importers • cooperative in WA sell direct to overseas buyers • wholesalers awareness of where to access as well as bad experiences few distributing	• wholesale butchers supplied with whole carcases • cuts supplied at retail level	• producers sell to abattoirs who either export or sell direct to halal butchers; small amount is sold to game meat wholesalers who on-sell to the restaurant/hotel sector • processors export directly to importers where most is sold in the wet markets with a small percentage sold to supermarkets & hotels/ restaurants

Competitive factor	**Camel**	**Venison**	**Crocodile**	**Kangaroo**	**Ostrich**	**Emu**	**Buffalo**	**Goat**
Marketing								
Retailer/ distributor relationships	• limited knowledge by state wholesalers; misinformation exists within this group • state wholesalers tend to be very small game meat wholesalers with limited clients & no connections with Muslim segments • butchers/ supermarkets have low turnover and limited knowledge of product • halal butchers: small demand, no follow-up supply • game butchers happy with meat & distributor service • retailers, chefs, butchers have no information on camel	• good relationship with meat wholesalers • Few farmer groups (2 coops) involved in distributing venison domestically & export • chefs, butchers, wholesalers have information on cuts, nutritional value, recipes from RIRDC market development program and information produced by individual operators	• good relationship with meat wholesalers • strong competition from cheap imported PNG crocodile meat which is reported to be of inferior quality	• kangaroo cited as good example in terms of processing & packaging & product information • good reputation & sales reported by game & mainstream meat wholesalers • Coles Supermarket policy restricts distribution in all states except SA and NT due to pressure from animal liberationist groups	• poor relationship with wholesalers and retailers domestically • retailers reluctant to stock	• limited awareness domestically, limited distribution by established wholesalers • some export *ad hoc* – limited long-term overseas market relationships	• limited supplies of Tenderbuff & export meat • not a lot of literature available for retail display • cuts similar to beef; fewer problems than other game meats	• poor relationships domestically due to insufficient supply • MLA has developed cut and preparation information for the foodservice sector for Capretto & Chevon

Competitive factor	Camel	Venison	Crocodile	Kangaroo	Ostrich	Emu	Buffalo	Goat
Marketing								
Promotional skills	• promotion reactive rather than planned—target market, strategy & tactics not defined • publicity mainly targeted at consumers in NT • reliant mostly on public relations, agric. shows, some advertising—export & supermarkets, chef promotions in capital cities (e.g. Tall Australian) • carcase description booklet exists but not widely distributed • butchers advertise camel in newspapers & shop windows	• limited promotion by individual operators— PR, recipes, carcase cuts, attendance at overseas food fairs • trade promo. information such as recipes, carcase cuts produced by RIRDC still used • in the past RIRDC jointly funded an industry market development program focused on foodservice, using PR, training • targeting mainly trade in overseas markets through food shows	• limited promotion by individual operators—recipes • carcase description booklet has limited distribution	• promotion mainly by Southern Game—PR, recipes, promotional material, attendance at food fairs • target is mainly trade (domestic & export) and some consumers through food media • ongoing public relations, domestic and export • publication of carcase description language by AUS-MEAT & RIRDC	• some promotion by individual operators—recipes, cuts and cooking hints • some targeting trade—food fairs, recipes • AOA produces some promotional material which it sells to members for their use • Austrade promoted ostrich in Japan & Korea via 'Supermarket to Asia' • most promotion has been of birds not product • RIRDC cuts booklet exists	• initially promoted by WA Ag dept through in-store tastings and food shows and promotional material • industry uses this promotional material • RIRDC emu cuts booklet exists • some promotion Woolworths, butcher shops and agriculture shows	• promoted mainly at Darwin shows • some chefs' evenings • some butcher and store promotions • not heavily promoted due to supply limits	• limited promotion by individual operators • some by halal butchers through advertising its availability to customers • MLA video and promotional material on Capretto, Chevon targeting up-market restaurants/ hotels, and foodservice in export markets and domestically

Competitive factor	**Camel**	**Venison**	**Crocodile**	**Kangaroo**	**Ostrich**	**Emu**	**Buffalo**	**Goat**
Marketing								
Sales force	• CACIA Exec. Officer has selling role part-time • state game meat distributors not actively promoting camel	• no dedicated sales force • Reliance on specialist game meat & some mainstream meat wholesalers to sell product some farmer groups also involved in selling • some producer groups have sales people overseas	• no dedicated sales force • reliance on game meat wholesalers to sell product and traders to export	• companies have own sales persons/team domestically • agents appointed overseas	• some companies employ sales people and agents overseas • cooperative sales mainly arranged by farmers	• Reliance on domestic wholesalers • export fill orders	• supplied only on demand from wholesalers • price high compared with beef but margins small	• no dedicated sales force • sold by abattoirs to export markets & by butchers to their clientele
Customer confidence	• lack of confidence by both trade & consumers • hygiene concerns—processing, meat safety • feral supply, nature of animal unpopular	• variable consumer & trade confidence • long history of consumption in some export markets • farmed, not feral	• lack of confidence by consumers • trade confident of hygiene standards in Australia but not imports from PNG • farmed	• lack of consumer confidence in some states • high confidence within trade • some consumers associate it with pet food • wild	• some lack of confidence following collapse of AOC • export market loss of confidence due to avian influenza outbreak • farmed	• export market loss of confidence due to avian influenza outbreak • farmed	• difficulties selling Tenderbuff due to inconsistent quality • problems with pet food image	• consumer & trade confidence within traditional ethnic segment • domestic farmed product suffers when feral goat floods market at lower cost

Competitive factor	Camel	Venison	Crocodile	Kangaroo	Ostrich	Emu	Buffalo	Goat
Marketing								
Pricing[28]	• lower priced than other game meats • wholesale: rump $16/kg, striploin $18.95/kg	• high priced • wholesale: bone in legs $18.10/kg, denivered rump, topside round $23.60/kg, saddles dressed bone-in $26.50/kg, tenderloin fillets $41.50/kg, diced forequarter $15.50/kg, mince $9.90/kg	• high priced • wholesale: tall frozen, boneless $29.90/kg, body meat frozen boneless, $27.50, leg meat boneless $19.50/kg)	• low priced compared to other game • wholesale: fillet/loin $13.30/kg, rump steak & leg cuts $9.50/kg, mince $4.95/kg, tail $8.20/kg	• high priced • wholesale (fillets $32.50/kg, steaks $28/kg, • export to Europe: prices fillets $14–18/kg, steak cuts $10–12/kg trim $4–5/kg	• high priced • wholesale: fillets premium $24/kg, fillets $18.90/kg, steak $14/kg,, mince $6.25/kg • export: bird in box $9/kg (mix of cuts)	• high priced • wholesale fillets $39.50/kg, rump $19/kg • export from Darwin in 1997: - $1.40/kg and $2.00/kg from NSW and Vic.[29] • feral cull for Europe was $1.30– 1.40/kg dressed in 1997	• low priced • whole saddles (cryovac) $9.50/kg, leg $6.50/kg, stiploin $26/kg, shoulder $3.50/kg, whole $45 each • wholesale: mature carcases $2.50–3/kg, Capretto $4.50/kg

[28] Milligans Gourmet Gallery 1998; BJ's Game & Poultry Pty Ltd, (1998)
[29] McKinna, 1999

Competitive factor	**Camel**	**Venison**	**Crocodile**	**Kangaroo**	**Ostrich**	**Emu**	**Buffalo**	**Goat**
Marketing								
Image/ positioning	• focus on nutritional characteristics • no specific positioning used at present • associated with outback Australia • novel, unusual	• range of positioning statements over the years: - healthy new meal - natural deep red Australian venison—lean, tender, subtle flavoured - Australian farmed venison—redefining the game • tendency to focus on farmed, flavour & nutritional attributes • export focus on clean, green, farmed	• no specific positioning used • consumers perceive the meat to be wild, novel, risky	• focus on nutritional attributes—lean, low fat and cholesterol, high iron • leading innovative companies focused on quality assurance & meat safety	• focus on nutritional attributes—low fat cholesterol, high iron • no social, religious barriers to consumption • disease outbreak has affected access to export markets	• focus on nutrition – low fat, cholesterol – healthy & delicious • disease outbreak has affected access to export markets	• nutritional: low fat and cholesterol • clean and green possible in NT • DPIF Agnotes supply recipes	• no positioning • sold as a commodity in export markets • Capretto domestically positioned by MLA as alternative meat selection for the nineties which allows chefs to express their personal style

Competitive factor	**Camel**[30]	**Venison**[31]	**Crocodile**[32]	**Kangaroo**[33]	**Ostrich**[34]	**Emu**[35]	**Buffalo**[36]	**Goat**[37]
Customer base								
Size & growth	• domestic market 49 tonnes in 1998 • domestic market growth 880% 1995–98 • live exports 32 1997 & 1998	• domestic market 329 tonnes in 1997 • domestic decline 31% 1995–97 • growth in meat exports to Malaysia & Indonesia • live exports 2 050 head in 1997–98 • growing exports to Europe, Asia and developing market in north America • export depends on NZ supply & value of A$; Asian economic situation has cut meat & live trade	• domestic market 196 tonnes in 1997 • domestic market growth 5% 1995–97 • meat exports of 13 tonnes in 1998 • growth of meat exports by 23% from 1995 to 1998	• domestic market 1 339 tonnes in 1997 • domestic market growth 180% 1995–97 • meat exports 2 016 tonnes in 1997 and 3 672 tonnes in 1998 • growth of meat exports 95% 1995–98 • moderate growth in sales to domestic hotels & restaurants, supermarkets, butchers	• domestic market 10 tonnes in 1997 • domestic market growth 400% 1995–97 • live exports stable; some interest in Japan, Korea & Thailand • rapid growth of meat exports: 1997—70 tonnes 1998—425 tonnes • domestic hotel & restaurants serviced by	• domestic market 68 tonnes in 1997 • domestic market growth 48% 1995–97 • meat exports: 1996–47 tonnes 1997–25 tonnes 1998–12 tonnes • meat exports declined by 74% 1996–	• domestic market 16 tonnes in 1997 • declining domestic market (–36%) • live exports 1 500 in 1998 • export meat static • growth of live trade by 50% in 1999 • problems with supply & substitution • tourism—restaurants & hotels biggest	• domestic market small (10% of production) • meat exports declined 5% 1995–97 due to lack of supply • 95—12 463 t • 96—12 107 t • 97—11 887 t • live exports 48 000 head in 1997 • small highly ethnic demand for goat meat in Australia

[30] Seidel, 1999; Table 1
[31] Tuckwell, 1998; Tume, 1999; ABS, 1998; Table 1
[32] Environment Australia, 1999; Table 1
[33] ABS, 1999; Table 1; Tuckwell, 1998; Tume, 1999
[34] English, 1999; McKinna, 1999
[35] Environment Australia, 1999; Table 1
[36] Lemcke, 1998; McInnes, 1999; Table 1
[37] Kellaway, 1999; Miller, 1998b; Twyford-Jones, 1998

		• slow growth in sales to domestic restaurants & hotels, supermkts, butchers		butchers • established domestic customer base • European market susceptible to animal welfare campaigns	serviced by regional groups—spasmodic growth • some prospects of distribution to supermarkets in SA and NT	98 • export market erratic	hotels biggest users of high priced cuts • lower cuts sold to butchers for sausages & burgers	• small growth in hotel/ rest. sector in Australia

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