

Goatmeat on US Menus

Research conducted by
Menu Matters 2025
On behalf of MLA



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Methodology

- Analysis combines Menu Matters proprietary trend intelligence with Menu Data menu database that captures approximately 3,000 US restaurants and around 10 million menu items
- 2021 benchmarks reference Datassential. Numbers reflect menu callouts/mentions only – not shipments or sales through the value chain.
- All measures are penetration/incidence on menus (e.g., % of restaurants menuing at least one item featuring [protein]), unless otherwise noted.
- Use insights directionally to shape operator conversations and menu development; not to infer volume.



US Foodservice Context

↘ **Pressures:** Staffing, availability/consistency, input costs, menu streamlining, slower innovation

↗ **Tailwinds:** Multi channel offerings, menu optimisation, format/footprint innovation in some segments

In a tighter operating environment, proteins need a clear value story. **Goat** should be positioned as an **accessible, globally inspired** option that delivers **flavour, authenticity** and **differentiation** at a manageable cost.

2026 Menu Matters Consumer Need States

These consumer needs states explain what US diners are looking for from food experiences in 2026 and provide context for how proteins can be positioned on menu

1. Real Food, Real Stories

Consumers want food that feels authentic, human-made, and grounded in real ingredients, not overly processed or ambiguous.

2. Simplify My Life

Consumers are overwhelmed by information overload (74GB/day). They want clarity, transparency, and reduced complexity in choices.

3. Make My Experiences Meaningful

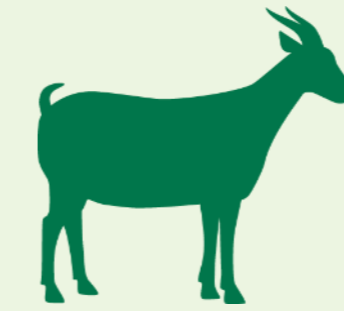
People increasingly value connection, care and human touch in food experiences – what makes dining feel personal and memorable?

4. Help me Trust Again

Consumers crave credibility and reassurance from brands – accurate info, honest value and real benefits behind claims.

5. Reduce the Noise

Consumers want brands that cut through digital clutter and offer calm, confidence and focus in an overwhelming environment.



What does this mean for goat?

- Smaller formats (e.g. snacks) reduce risk and support trial of an unfamiliar protein
- Authentic, globally inspired flavours align with consumers seeking real, culturally rooted food experiences
- Goat supports bold flavour exploration, enabling diners to engage with new cuisines
- Flexible across cuisines, goat enables cultural discovery within familiar menu formats
- Operators can emphasise realness – natural, minimally processed, human-prepared dishes

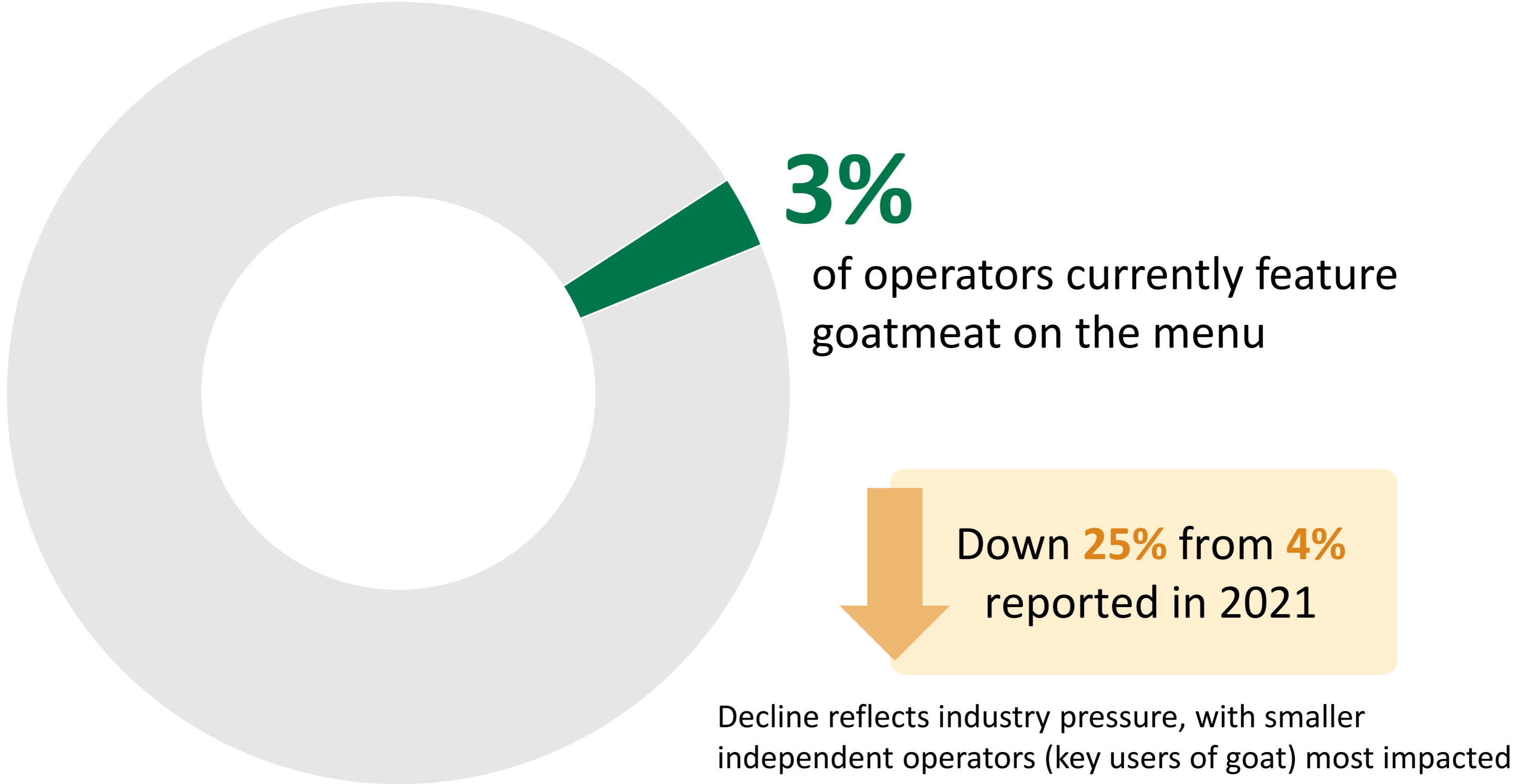
Executive Summary + Key Insights

- **Goat** remains niche but nationally present (3% of restaurants), with penetration declining since 2021 due to independent operator pressure and menu simplification
- **Goat** plays a trial and discovery role, offering operators a lower-cost way to introduce global flavours and new proteins
- **Growth** in **QSR** and **fast casual** improves **accessibility** and **supports** consumer **experimentation**
- Strongly **concentrated** in **African**, **Indian** and **Caribbean** cuisines, limiting exposure in mainstream formats
- **Usage** is heavily **main meal focused**, creating barriers to trial for unfamiliar diners
- Australian **goat** is significantly under-identified on menus, despite its strong presence in supply

➔ **Opportunity:** Grow goat by expanding into mainstream formats (burgers, sandwiches, tacos) and smaller portions, supported by clear origin and value storytelling

Goat penetration has declined slightly as operators prioritise familiar, core menu items

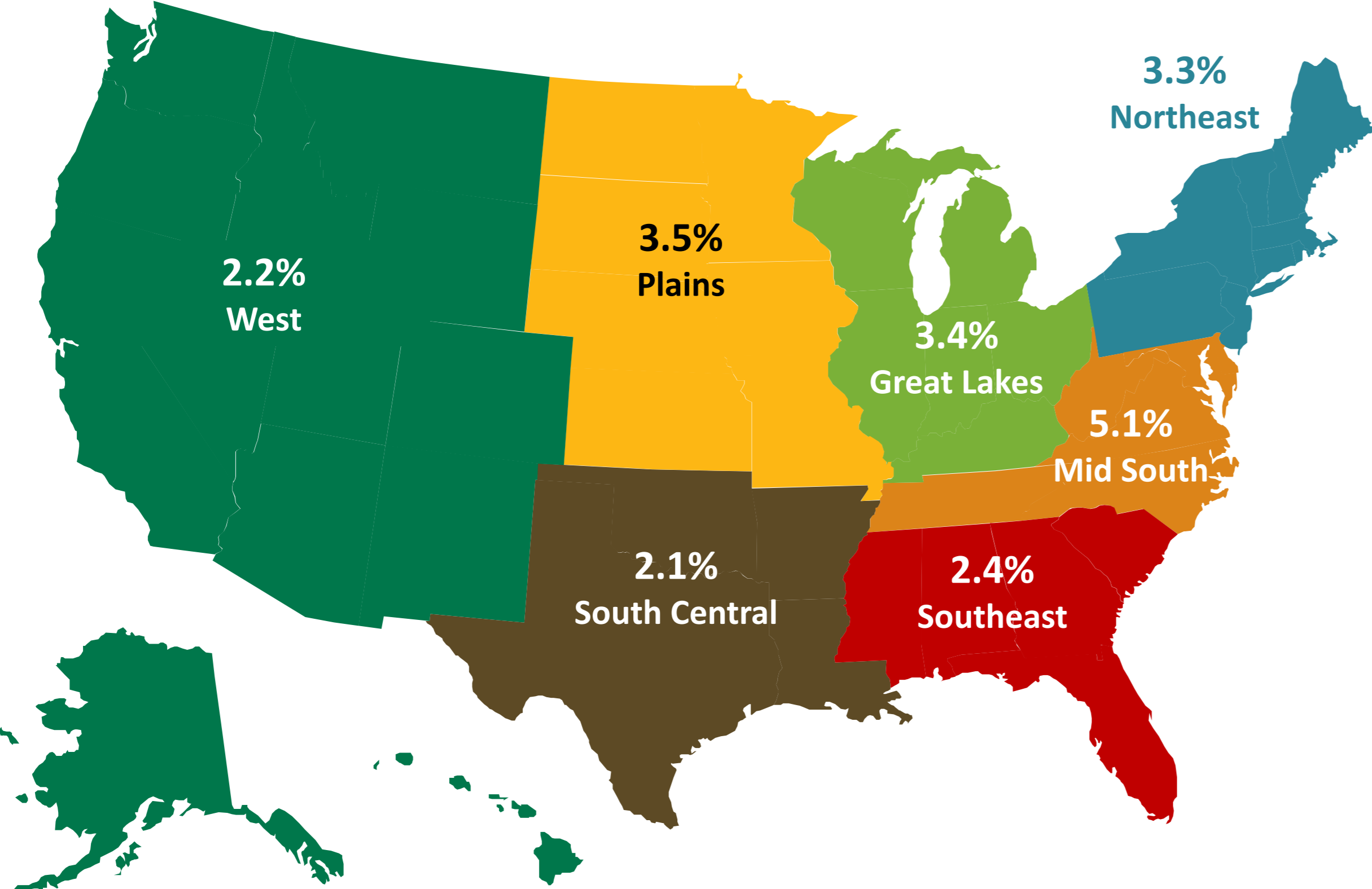
Share of Restaurants Currently Menuing Goatmeat (2025)



Source: Menu Matters MLA 2025 Menuing Report, 2021 data from Datassential
NOTE: Penetration represents the percent of all restaurants currently menuing at least one item featuring goatmeat.

Regional presence reflects immigrant demographics but goat is present across all US markets

Share of Restaurants in each Region Currently Menuing Goatmeat (2025)



2021 Data

West	2.8%
Midwest	2.7%
South	3.6%
Northeast	3.2%

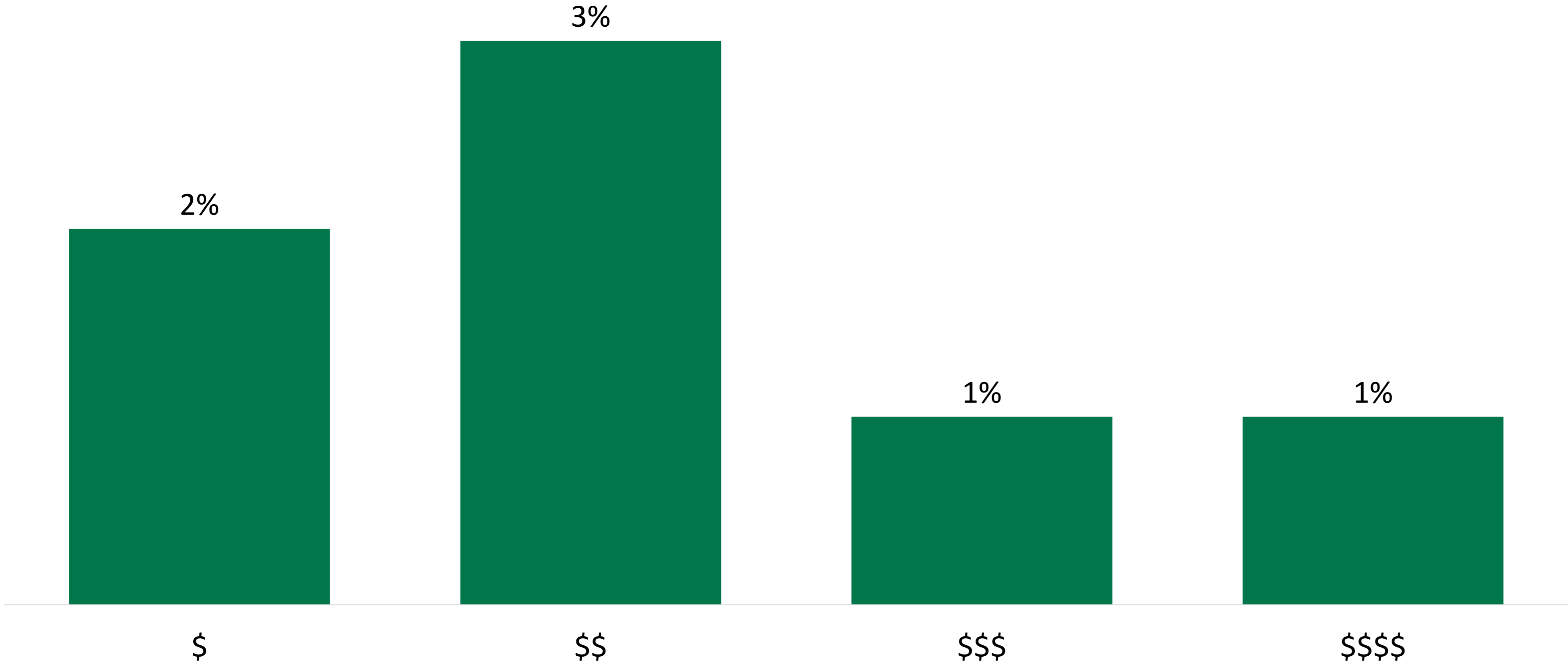


Opportunity exists to expand awareness beyond core communities through mainstream formats

Source: Menu Matters MLA 2025 Menuing Report, 2021 data from Datassential
 NOTE: Penetration represents the percent of all restaurants currently menuing at least one item featuring goatmeat

Increased access in lower price point segments (e.g. QSR, fast casual) supports diner experimentation and trial

Share of Restaurants by Price Point Currently Menuing Goatmeat (2025)



2021 Data	
Quick Service	1%
Fast Casual	2%
Midscale	5%
Casual Dining	4%
Fine Dining	5%

Source: Menu Matters MLA 2025 Menuing Report

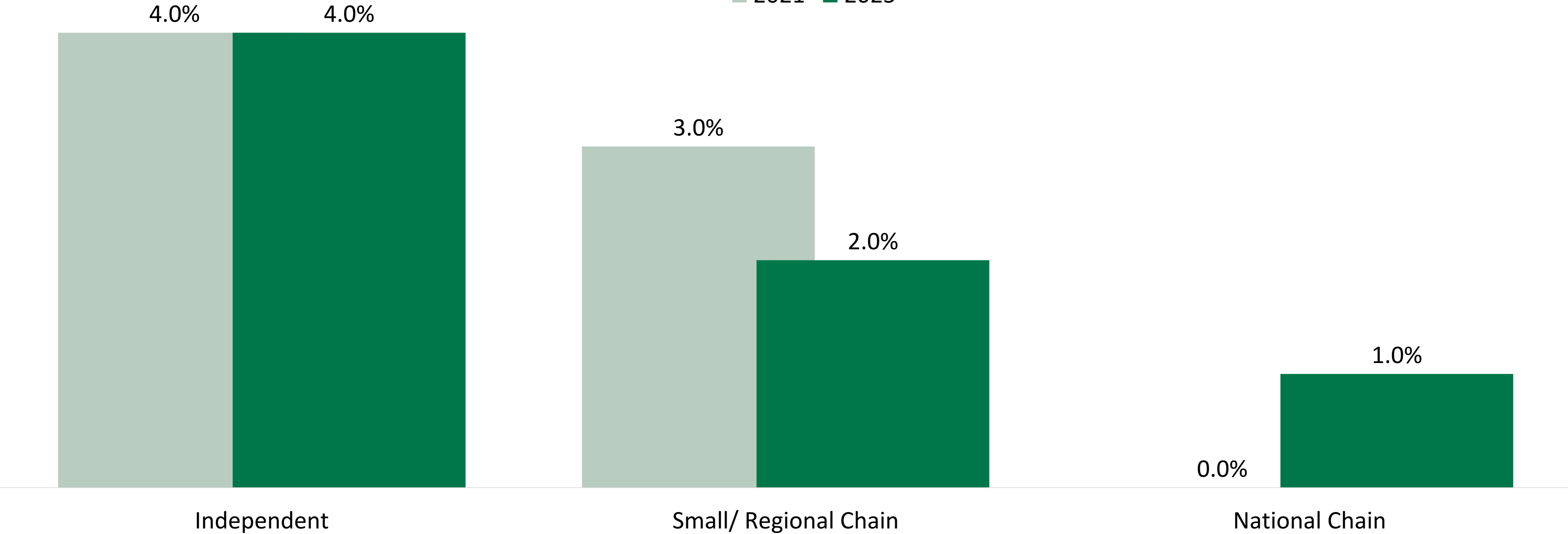
NOTE: Penetration represents the percent of all restaurants currently menuing at least one item featuring goatmeat

 See restaurant definitions in the **Appendix**

Independent operators lead adoption with moderate presence in small/regional chains while national chains presence remains minimal

Share of Restaurants by Type Menuing Goatmeat (2025 vs 2021)

2021 2025



Source: Menu Matters MLA 2025 Menuing Report, 2021 data from Datassential
NOTE: Penetration represents the percent of all restaurants currently menuing at least one item featuring goatmeat

 See restaurant definitions in the **Appendix**

Cuisine concentration reinforces authenticity (African, Indian, Caribbean) but limits mainstream reach

Share of Restaurants by Menu Focus Currently Menuing Goatmeat (2025)



Expansion into American, burger and sandwich menus is critical to driving wider trial and adoption

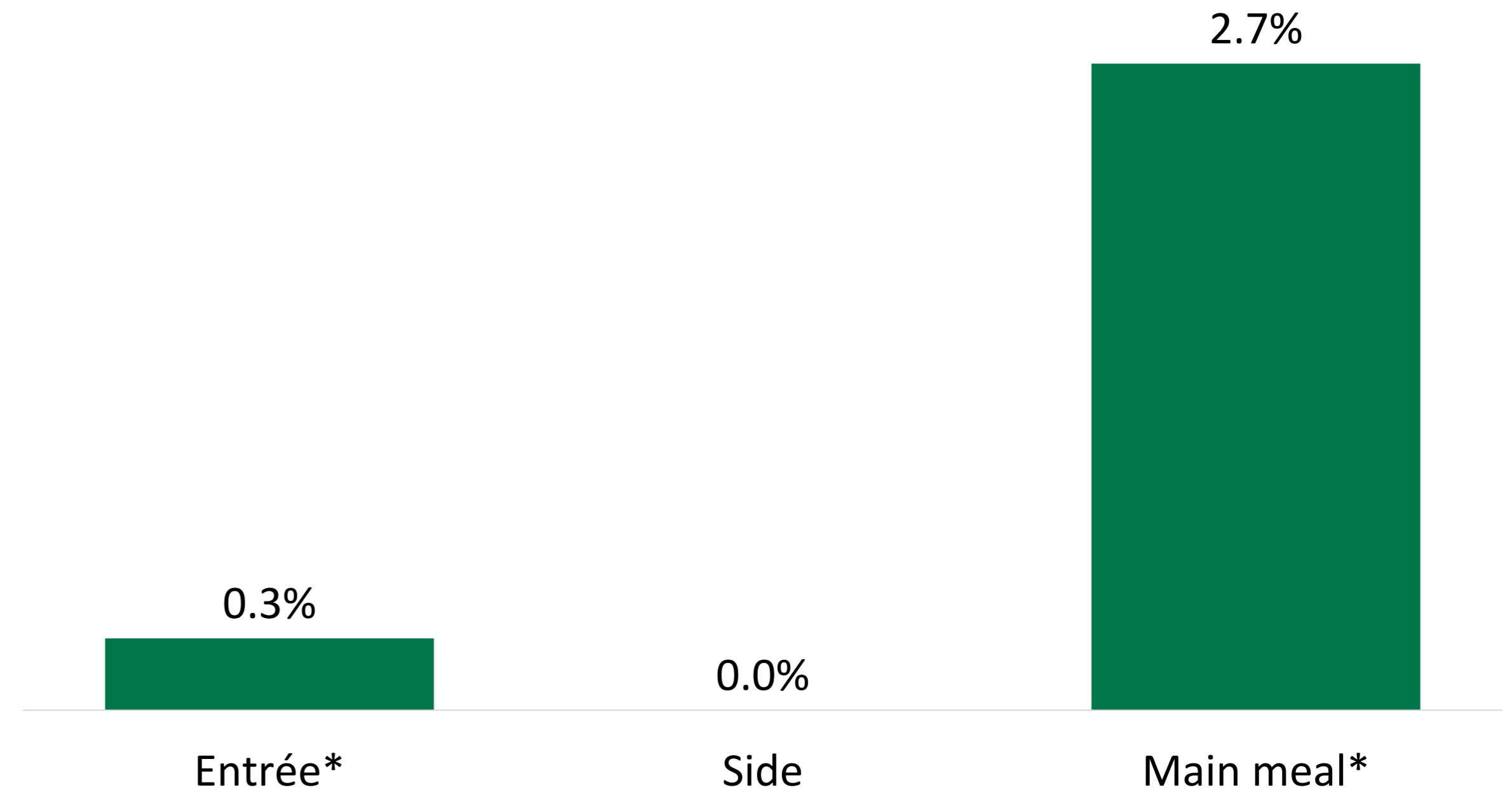
Source: Menu Matters MLA 2025 Menuing Report

NOTE: Penetration represents the percent of all restaurants currently menuing at least one item featuring goatmeat



Goatmeats main meal focus, limits trial and slows adoption

Share of Restaurants Currently Menuing Goatmeat by Menu Part (2025)



Goatmeat featured in smaller formats (entrées, snacks) are key to reducing risk and encouraging first-time trial

Source: Menu Matters MLA 2025 Menuing Report

NOTE: Penetration represents the percent of all restaurants currently menuing at least one item featuring grassfed beef

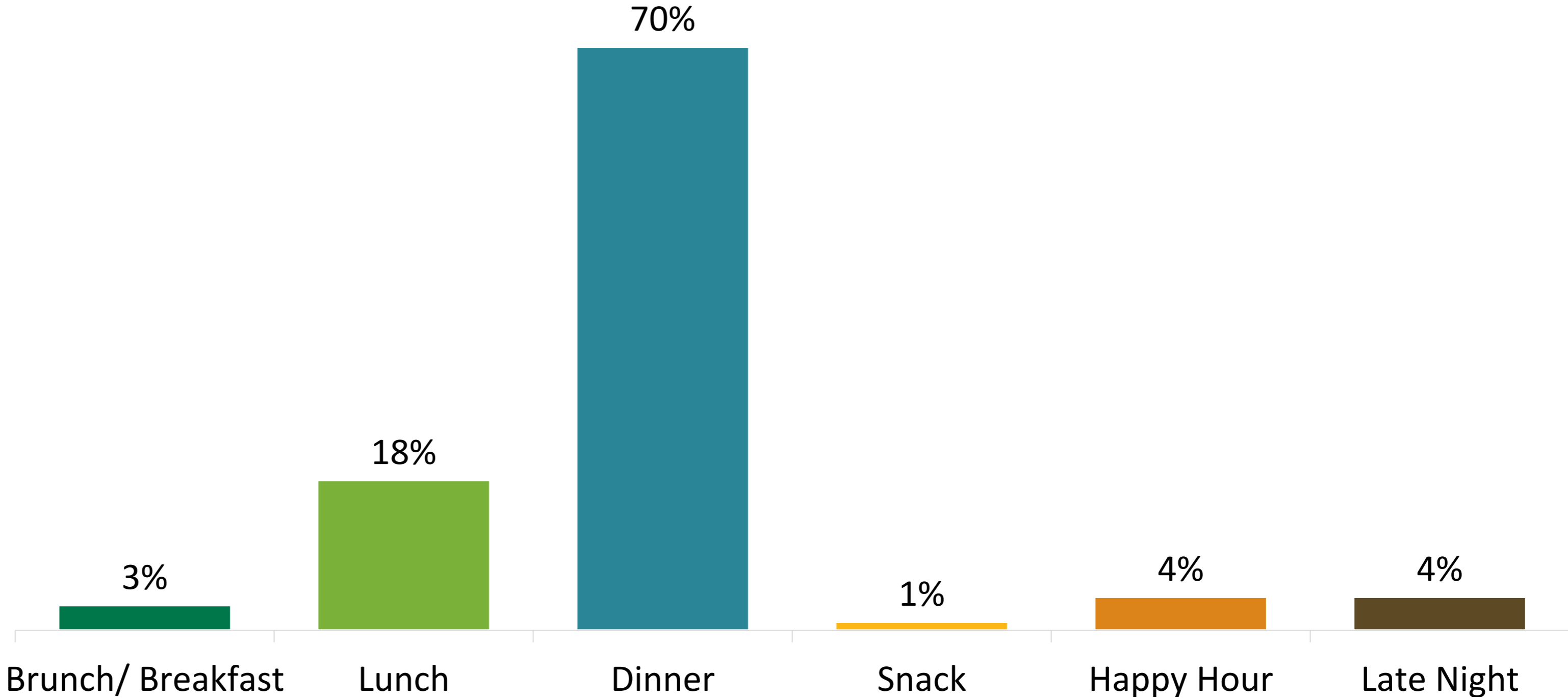


See menu terminology definitions in the **Appendix**



Goatmeat is heavily concentrated at dinner, with opportunity to expand into additional occasions

Distribution of Items Featuring Goatmeat by Daypart (2025)



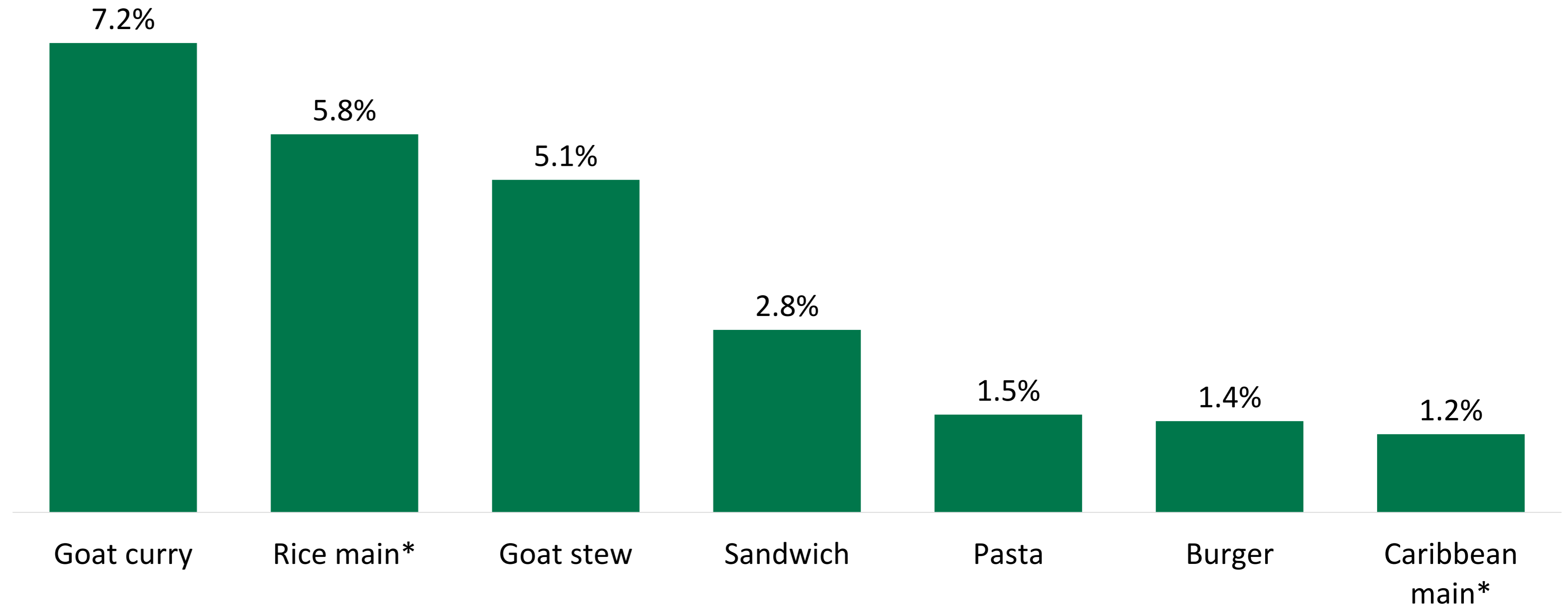
Growth in **lunch, snacking** and **shareable formats** (e.g. goat paella, pictured left) can increase frequency and accessibility

Source: Menu Matters MLA 2025 Menuing Report
NOTE: Penetration represents the percent of all restaurants currently menuing at least one item featuring goatmeat



Traditional formats (curry, stews and rice mains), limiting accessibility in familiar everyday menu items

Incidence of Goatmeat by Item Type (2025)



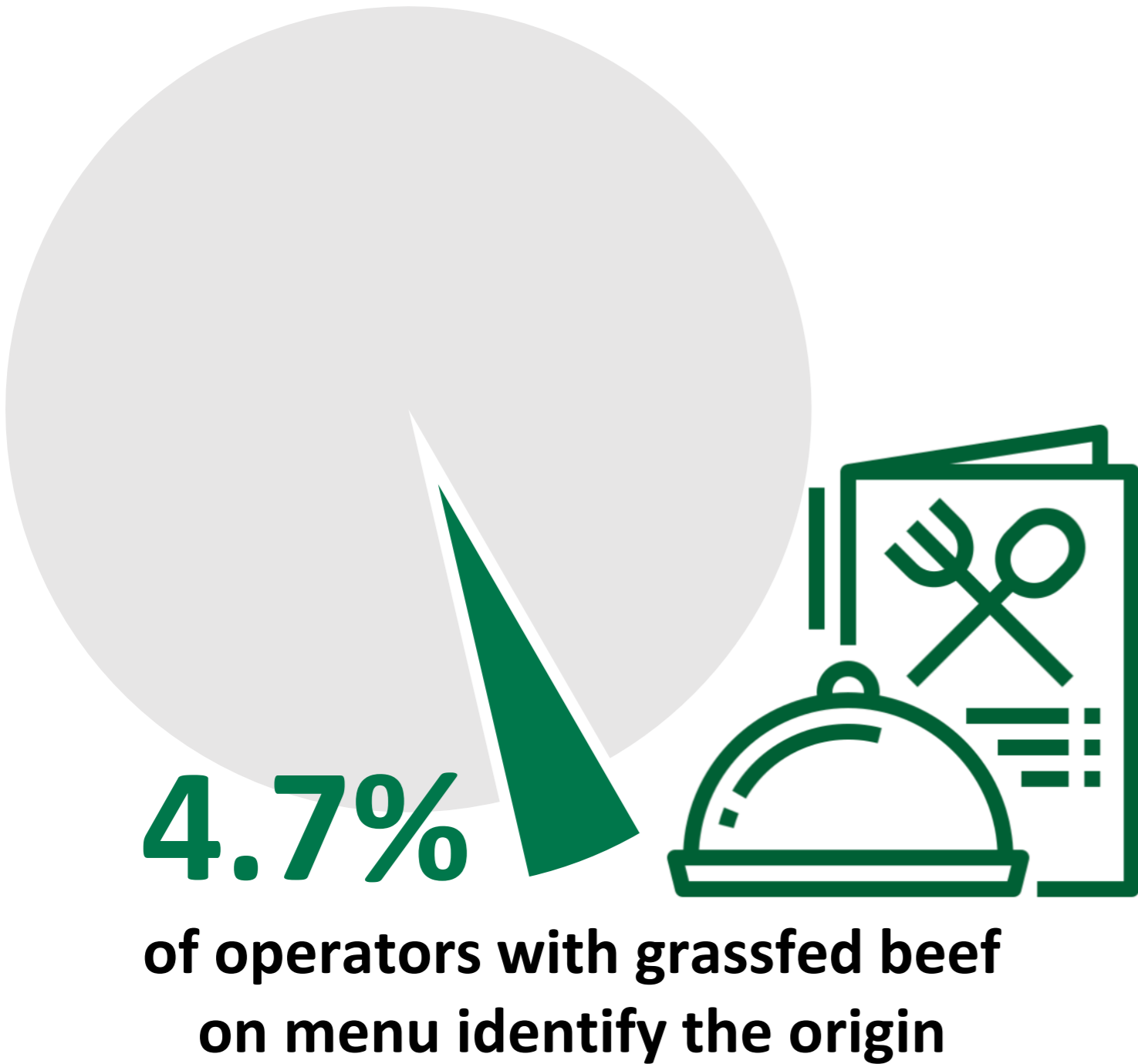
Expanding into **burgers, sandwiches** and **handheld formats** (e.g. goat empanada, pictured left) can accelerate mainstream acceptance and adoption



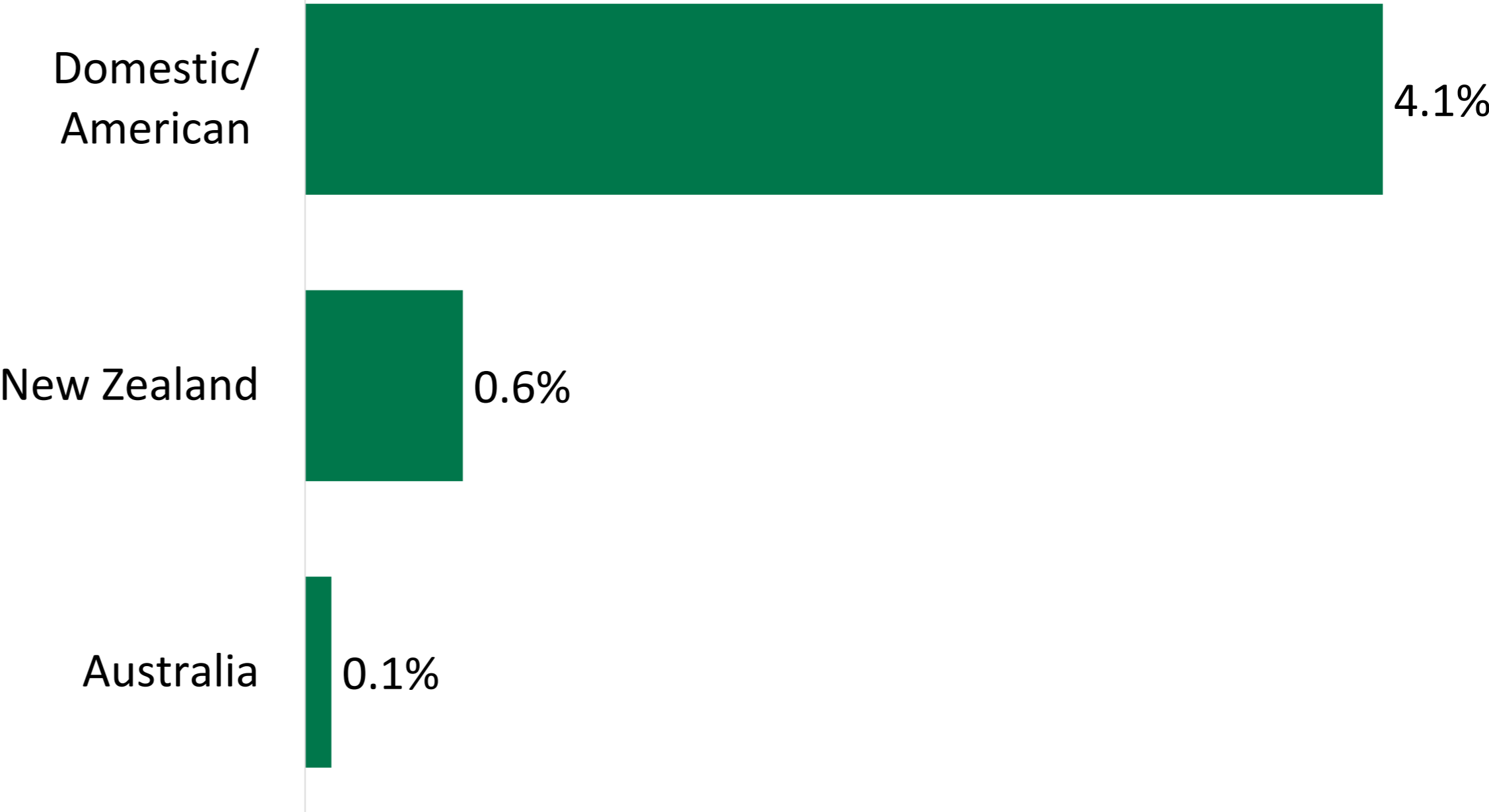
See menu terminology definitions in the **Appendix**

Source: Menu Matters MLA 2025 Menuing Report, NOTE: Penetration represents the percent of all restaurants currently menuing at least one item featuring goatmeat, *Main=entrée usage in original survey design

Country of origin is rarely identified, limiting trust and value perception



Penetration of Source of Origin Identification Among Operators Menuing Goatmeat (2025)



➔ **Opportunity:** Introduce provenance storytelling in widely recognised formats to build trust, credibility and awareness of Australian goat

Source: 2025 data from Menu Data; 2021 data from Datassential, NOTE: Penetration here is across all operators currently menuing at least one item with goatmeat. For example, 4.7% of operators with goatmeat on the menu identify it as “domestic” or “American”

Appendix



Meal Part and Restaurant Type Definitions

Meal Part Definitions

- **Appetizers:** Small or shareable plates offered before the entrée, may also be called small plates, starters, hors d'oeuvres or entrées in Australia
- **Entrees:** The main meal portion, main course or large plate option on a menu, often featuring a center-of-plate protein but may also feature handhelds, burgers, sandwiches, large salads, etc. It is the 'main' in Australia

Restaurant Type Definitions

- **Independents:** Operations with only 1 to 3 units, most often in a small geographic footprint
- **Small/regional chains:** Operators with 4 to 50 units that may stretch across one or two contiguous regions
- **National chain:** Over 50 units with chains distributed across the country, though not necessarily present in every state or region



Restaurant Segment Definitions

- **Quick service (\$):** traditional fast-food restaurants, typically offering food at the lowest price point across segments with an emphasis on counter, takeout, drive thru and delivery
- **Fast casual (\$\$):** operators that are at a slightly higher price point than quick service, often emphasize health and/ or premium quality, with a greater emphasis on on-site dining in addition to counter and delivery
- **Midscale (\$\$\$):** Table-service restaurants often with an emphasis on breakfast and no alcohol though many global cuisine operators without alcohol will also fall into this segment
- **Casual dining (\$\$\$\$):** Table-service restaurants often with an emphasis on bars and alcohol programs, typically do not offer breakfast
- **Fine dining (\$\$\$\$\$):** White tablecloth, table-service restaurants with an emphasis on dinner programs and least likely to offer delivery or to-go programs

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