

The weighted average purchase for all firms was slightly under \$0.95 per pound. The weighted average sale price was just under \$1.09 per pound. Thus, the weighted average mark-up was 15 percent for all wholesale firms. It was found that small- and medium-size firms received higher prices for small quantities sold directly to consumers.

The wholesalers were asked for their opinions as to the ethnic origin of goat meat consumers. Haitians were mentioned by nearly 60 percent of the current goat meat wholesalers as being important consumers of goat meat. Jamaicans, other Caribbean, and Asian Indians were also thought to be significant consumers of goat meat. Contrary to popular opinion, Cubans were not viewed as a major ethnic market for goat meat.

Nearly four-fifths of all wholesalers carrying goat meat sell it throughout the year. However, the period from November through March was the period which most wholesalers identified as the peak demand season for goat meat. This period encompasses several important holidays, and also the peak period for seasonal farm labor. Limited supply was the most frequently mentioned marketing problem and came exclusively from large- and medium-size firms.

Food Retailers

To understand how goat meat is distributed beyond the wholesale level, a survey of meat merchandisers of chain supermarkets was conducted. The survey targeted food retailers in areas with relatively high concentrations of ethnic populations. The areas selected were Miami (Dade County), Fort Lauderdale (Broward County), and Tampa (Hillsborough County).

Seventeen retail food chains operating 622 stores in the study region were surveyed. Six small chains, comprised of 168 stores, sold goat meat. However, goat was being sold in only 28 of these 168 stores. Chains selling goat meat tended to cater to specific groups of ethnic consumers. Although the city of Belle Glade is located outside the immediate study area, it was mentioned by two chains as being an important market for goat meat. Belle Glade is the winter home of a large agricultural migrant labor force, which is comprised largely of Mexicans and is at its peak from November through February.

Total annual volume sold by the six chains in 1986 was approximately 58,450 pounds. Two chains sold 84

percent of the total survey volume. The 28 individual stores selling goat meat sold an average of 2,088 pounds per year or about 40 pounds per week. Ninety-nine percent of the survey volume was purchased in frozen product form. Five of the six chains purchase whole carcasses. Most of the meat was resold in sub-primal chunks containing no specific body part.

The wholesale purchase price (per pound, whole carcasses) ranged from \$1.10 to \$1.20, and averaged \$1.16. The retail price ranged from \$1.50 to \$1.69, and averaged \$1.58. Overall mark-up on purchase price averaged 26 percent. Three of the four low-volume chains indicated that there is seasonality of demand with peaks during Christmas, Easter, and during the influx of migrant workers.

Half of the six chain store representatives selling goat meat said they encountered no marketing problems, but two mentioned lack of demand as a problem. Only one, a chain representative with the largest goat meat sales, mentioned supply as a problem. Indications are that one chain store purchased Australian mutton and sold it as goat meat at a relatively low price. This practice, coupled with the lack of obvious differences between mutton and goat carcasses, could be a problem to wholesale buyers and consumer alike.

Goat meat was promoted to a significant degree by only one chain store which ran specials at a reduced price and mailed fliers to its customers. Another chain periodically included goat meat advertisements in weekly fliers.

Representatives of chain stores presently selling goat meat see little growth in sales. They feel that goat meat, in general, appeals only to a small ethnic segment of the population, predominantly older Latins and Haitians. Furthermore, they said that goat meat was not more profitable than other meat items, indicating lack of incentive for promotion. However, their reactions were generally positive in terms of customer acceptance, supply, meat quality, and compatibility of goat meat with other meat items.

The attitudes of representatives of chain stores not selling goat meat are important in understanding why goat meat is not sold more widely, and in determining barriers that exist towards future market expansion. Most of the representatives of eleven chains not selling goat meat that responded to the interview felt there was insufficient ethnic trade to