



# **AgriFutures Goat Fibre Program Strategic RD&E Plan (2021-2026)**

September 2021  
by Clinton Muller, RMCG



**AgriFutures<sup>®</sup>**  
**Goat Fibre**



# AgriFutures Goat Fibre Program Strategic RD&E Plan (2021-2026)

© 2021 AgriFutures Australia  
All rights reserved.

AgriFutures Goat Fibre Program  
Strategic RD&E Plan 2021-2026

The information contained in this publication is intended for general use to assist public knowledge and discussion and to help improve the development of sustainable regions. You must not rely on any information contained in this publication without taking specialist advice relevant to your particular circumstances. While reasonable care has been taken in preparing this publication to ensure that information is true and correct, the Commonwealth of Australia gives no assurance as to the accuracy of any information in this publication.

The Commonwealth of Australia, AgriFutures Australia, the authors or contributors expressly disclaim, to the maximum extent permitted by law, all responsibility and liability to any person, arising directly or indirectly from any act or omission, or for any consequences of any such act or omission, made in reliance on the contents of this publication, whether or not caused by any negligence on the part of the Commonwealth of Australia, AgriFutures Australia, the authors or contributors.

The Commonwealth of Australia does not necessarily endorse the views in this publication. This publication is copyright. Apart from any use as permitted under the Copyright Act 1968, all other rights are reserved. However, wide dissemination is encouraged. Requests and inquiries concerning reproduction and rights should be addressed to AgriFutures Australia Communications Team on 02 6923 6900.

**AgriFutures Australia contact details**  
Building 007, Tooma Way  
Charles Sturt University  
Locked Bag 588  
Wagga Wagga NSW 2650

02 6923 6900  
info@agrifutures.com.au  
www.agrifutures.com.au

**Author contact details**  
Clinton Muller  
Senior Consultant, RM  
Consulting Group Pty Ltd  
Level 1 East,  
1100-1102 Toorak Road  
Camberwell VIC 3124

0498 192 596  
clinton@rmcg.com.au

ISBN: 978-1-76053-191-1  
ISSN: 1440-6845  
Publication No. 21-084  
Project No. PRO-013268

Photos: Jack of Hearts Studio; Doug Stapleton; Andrew James;  
African Renaissance Designs

Electronically published by AgriFutures Australia  
at [www.agrifutures.com.au](http://www.agrifutures.com.au) in September 2021

AgriFutures Australia is the trading name for Rural Industries Research & Development Corporation (RIRDC), a statutory authority of the Federal Government established by the Primary Industries Research and Development Act 1989.





# Foreword

The AgriFutures Goat Fibre Program invests in research, development and extension (RD&E) to foster a sustainable and more profitable Australian goat fibre industry.

The industry is made up of two sub-industries – mohair and cashmere – and product is used to manufacture fine, quality clothing and furniture fabrics. Available data indicates the sub-industries collectively represent about 5.5% of global production.

Mohair is produced from Angora goats and farming did not take hold in Australia until the 1970s. The majority of Australian mohair is sold directly into international markets and is processed offshore. The Australian cashmere industry was likewise established in the 1970s and, after years of selective breeding, the Australian cashmere goat has evolved into a distinctive breed, far removed from its bush goat origins.

The priorities of this Strategic RD&E Plan are ensuring the goat fibre industry has sustainable growth in the number of producers, and that the industry is collaborative and produces consistent and quality goat fibre. These priorities are underpinned by four strategies.

Strategic RD&E Plans are a key part of implementing AgriFutures Australia's RD&E strategies, and are the base on which investments are made on behalf of our levied industries. These Plans identify productivity and sustainability RD&E priorities and the planned outcomes for each industry. Each has an appropriate balance of productivity and sustainability RD&E priorities.

AgriFutures Australia's vision is to grow the long-term prosperity of Australian rural industries. We have three strategies to grow profitability and sustainability in our levied industries:

- Engaging industry participants in determining RD&E priorities.
- Investment in innovation that assists levied industries to be more profitable.
- Delivering outcomes to maximise industry uptake and adoption.

The profitability, productivity and sustainability of rural industries is AgriFutures Australia's core business, and the organisation works with its portfolio industries to invest in their priority RD&E needs. AgriFutures Australia fosters strong relationships with industry partners, including the goat fibre industry, to ensure RD&E investment leads to practical knowledge and innovation that can be adopted by industry members.

AgriFutures Australia will continue to work with the goat fibre industry to ensure the five-year research priorities meet industry needs and are informed by Government priorities. The adoption of RD&E outcomes is fundamental to success, and just as we have with the AgriFutures Goat Fibre Program Strategic RD&E Plan, AgriFutures Australia will work with industry and Government stakeholders to ensure the corporation invests in knowledge that is useful and adopted by end users.

**John Smith**  
General Manager, Research  
AgriFutures Australia

**“AgriFutures Australia will continue to work with the goat fibre industry to ensure the five-year research priorities meet industry needs and are informed by Government priorities.”**

John Smith



# Contents

Our vision	8
Executive summary	9
Plan on a page	10
Alignment with AgriFutures Australia Strategic Plan	11
Industry profile	12
Financial position and investment projections	16
Industry consultation	17
AgriFutures Goat Fibre Program Strategic RD&E Plan (2021-2026)	20
Communication, extension and adoption of RD&E outcomes	22
Monitoring, evaluation and reporting (MER) framework	24
Plan implementation and governance	28
Appendices	30





# Our vision

To grow the long-term prosperity of Australian rural industries



## Executive summary

The AgriFutures Goat Fibre Strategic R&D Plan 2021-2026 has been developed in consultation with the Australian mohair and cashmere goat fibre industries as a roadmap to support their research, development and extension needs over the next five years.

The goal of the Program is to grow the size, production, reputation and value of the Australian goat fibre industry.

The Plan is structured around two priorities, each with three activities to support their achievement.

The priorities are:

### Priority 1

Sustainable growth in the number of producers productively contributing to the goat fibre industry.

### Priority 2

A collaborative industry that produces consistent and quality goat fibre.

Details of activities to implement the priorities, and key performance indicators to measure success, are provided within the body of the Plan.



Plan on a page

Table 1: AgriFutures Goat Fibre Program Strategic RD&E Plan 2021–2026 snapshot

Priority	Objective	Strategies	Activities
<div><div>1</div><div>Sustainable growth in the number of producers productively contributing to the goat fibre industry.</div></div>	Demonstrate the commercial viability and opportunities within the industry to underpin succession and production viability strategies.	<div>1.1 Research production characteristics of the industry.</div> <div>1.2 Document and communicate industry characteristics.</div>	<div>1.1.1 Undertake industry-wide survey of goat fibre producers to ascertain their locations, scales, future succession plans and production volumes (current/forecast) – by 2022.</div> <div>1.2.1 Develop industry case studies to demonstrate production gross margins and benchmarks at business scale and in the operating environment – by 2022.</div> <div>1.2.2 Prepare communication resources to support the appeal and development of the industry – by 2022.</div>
<div><div>2</div><div>A collaborative industry that produces consistent and quality goat fibre.</div></div>	Support industry participants and prospective entrants to the industry to enable them to increase their skills, knowledge and capacity in goat management for fibre production.	<div>2.1 Enhance industry relationships and collaboration.</div> <div>2.2 Improve access to technical advice and extension services</div>	<div>2.1.1 Employ an Industry Development Officer – commencing 2022.</div> <div>2.1.2 Coordinate industry field days, events, study tours and other identified activities – commencing 2023.</div> <div>2.2.1 Consolidate and distribute industry information resources – commencing 2023.</div>

Alignment with AgriFutures Australia Strategic Plan

AgriFutures Australia invests in research, innovation and learning initiatives that enhance the profitability and sustainability of the Australian agriculture sector. AgriFutures Australia supports rural industries with an R&D levy that do not have an industry-specific Research and Development Corporation (the levied industries).

Within its Strategic R&D Plan 2017–2022,<sup>1</sup> AgriFutures Australia established Arena 3, 'Growing Profitability', which sets out higher-level goals and priorities for levied industry investments. The stated goal, priorities and outcome of Arena 3 are as follows:

Goal

To enhance the profitability and sustainability of our levied rural industries. Regional communities and the broader Australian economy depend on profitable farms.

Priorities

- Engaging industry participants in determining RD&E priorities.
- Investing in innovation that assists levied industries to be more profitable.
- Delivering outcomes to maximise industry uptake and adoption.

Outcome

Industry participants are confident that their levy investment is delivering value.

<sup>1</sup> <https://www.agrifutures.com.au/product/agrifutures-australia-strategic-plan-2017-2022/>



# Industry profile

Australian goat fibre is of very high quality and is used to manufacture fine, quality clothing and furniture fabrics. The goat fibre industry is developing in response to demand for the product. The AgriFutures Goat Fibre Program aims to direct targeted research, development and extension (RD&E) initiatives that contribute to the profitability, sustainability and productivity of this industry.

The Australian cashmere industry was established in the 1970s and, after years of selective breeding, the Australian cashmere goat has evolved into a distinctive breed of goat, far removed from its bush goat origins. Cashmere is one of the finest commercial animal fibres. It is soft, warm, light and luxurious, and is used to make some of the most expensive garments in the world.

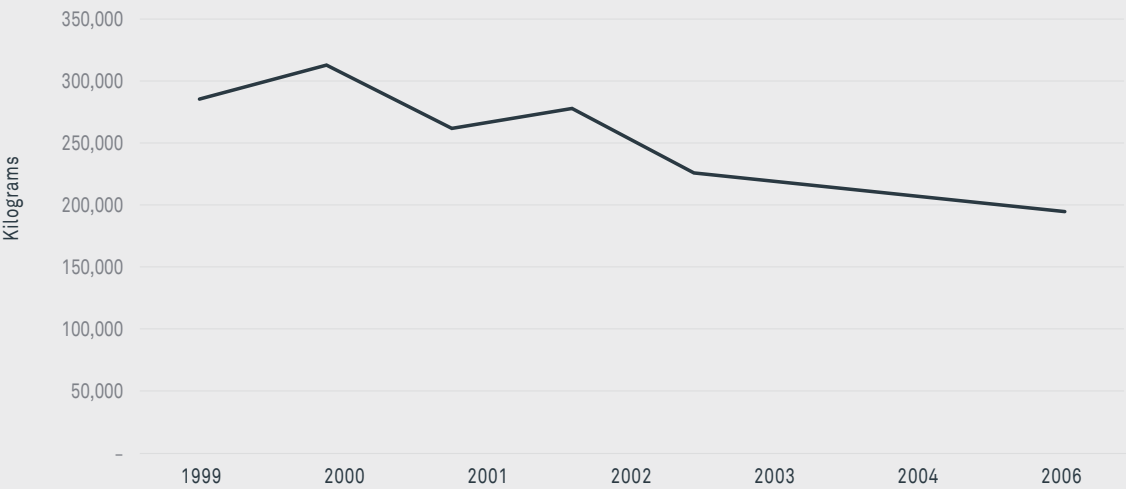
Mohair is produced from Angora goats. The finest mohair is used in high-end fashions and furnishings. The majority of Australian mohair produced is now sold directly into international markets and is processed offshore. Subsequently, value-adding and local processing is not a high priority for the mohair industry.

## Industry data

Available data indicates the Australian mohair industry, representing 5% of global production,<sup>2</sup> operates at a substantially greater scale than the Australian cashmere industry, which represents 0.5% of global production.<sup>3</sup>

Limited data exists to validate the scale of current cashmere and mohair production in Australia. The most recent verified data is based on a 2004 mohair industry survey of 154 growers producing 129,344 kilograms of mohair.<sup>4</sup> Data from an unpublished industry fact sheet (2006) based on figures from the two major Australian brokers demonstrated a declining production of mohair between 1999 and 2006, as illustrated in Figure 1. Mohair production in 2020-21 is estimated to be 80,000-85,000 kg. There is no available data on current cashmere production.

**Figure 1: Historic Australian mohair production data, 1999-2006**



<sup>2</sup> Chaffey SJ and McGregor BA, (2004), Making mohair attractive to investors, RIRDC Publication No 04/096.

<sup>3</sup> Chaffey SJ and McGregor BA, (2004), Making cashmere attractive to investors, RIRDC Publication No 04/097.

<sup>4</sup> Mohair Australia Limited, (2004), Australian Mohair Industry Summary, Australian Mohair Producers Survey results.



Industry opportunities and limitations

A SWOT analysis (strengths, weaknesses, opportunities and threats) was completed with the mohair and cashmere industries as part of the development of this RD&E Plan. The assessment highlights the largely sub-commercial nature of both industries and the vision to grow scale and participation in the goat fibre industry.

Table 2: Cashmere industry SWOT (2020)

Strengths	Weaknesses
<ul style="list-style-type: none"><li>• Good existing information.</li><li>• Existing skills and knowledge of production system.</li><li>• Cashmere well-suited to the Australian environment.</li><li>• Improved genetics – animals are profitable, productive and resilient, i.e. more farmable.</li></ul>	<ul style="list-style-type: none"><li>• Poor communication and dissemination of information.</li><li>• Limited processing facilities in Australia.</li><li>• Lack of emerging leaders and growers (succession plan).</li><li>• Ageing producer demographic.</li></ul>
Opportunities	Threats
<ul style="list-style-type: none"><li>• Credentialling and differentiating Australian cashmere.</li><li>• Climate change may benefit cashmere production areas.</li><li>• High goat fibre prices could be a pathway to convert goat meat producers into cashmere producers.</li><li>• Post-COVID-19 opportunities, including attracting new growers amid changing consumer preferences.</li><li>• Better communication of research and industry information.</li></ul>	<ul style="list-style-type: none"><li>• Lack of critical mass.</li><li>• Vulnerable to new threats, such as biosecurity risks or disease.</li></ul>

The cashmere and mohair industry SWOTs are presented in Table 2 and Table 3 respectively.

Table 3: Mohair industry SWOT (2020)

Strengths	Weaknesses
<ul style="list-style-type: none"><li>• Potential marketing opportunities when the international Responsible Mohair Standard (RMS) is adopted.</li><li>• Profitable enterprise opportunities – mohair vs wool.</li><li>• Production of renewable natural fibre.</li><li>• Unique fibre that blends well with traditional fibres.</li><li>• Clean, green and sustainable production image.</li><li>• Appropriate environmental conditions for goat grazing.</li><li>• Existing publications to communicate industry and research findings.</li><li>• High standard of capability in processing.</li><li>• Strong genetics.</li><li>• Existing skills and knowledge of production system.</li><li>• Passionate producers.</li><li>• Efficiency opportunities of running goats, i.e. chemical-free weed control.</li></ul>	<ul style="list-style-type: none"><li>• No future plan – last documented strategy was completed in 2014.</li><li>• Segmented industry – weaving vs non-weaving; local sales vs direct-to-South Africa sales; stud vs commercial viability.</li><li>• Ageing producer demographic.</li><li>• Low industry profile.</li><li>• Limited financial resources and funding sources.</li><li>• Limited levy collection.</li><li>• Poor communication and dissemination of information.</li><li>• Skills shortages – shearers/industry-qualified classers.</li><li>• Many peri-urban farmers with relatively small flock sizes.</li><li>• Primary producer mindset rather than profitability and marketing mindset.</li><li>• Lack of animal sales for buying/selling due to low numbers of paddock-raised Angoras.</li></ul>
Opportunities	Threats
<ul style="list-style-type: none"><li>• Develop a market focus – Australian brand.</li><li>• Develop a common vision – unified, growing, profitable.</li><li>• Credible mohair statistical and economic analysis.</li><li>• Ideal climatic conditions for establishing Angora herds.</li><li>• RMS is the global point of differentiation.</li><li>• Extension work – educating farmers to better farm Angora goats.</li><li>• Promotion – field days, short courses, mentoring and coaching.</li><li>• Identifying (and overcoming) impediments to increasing industry size and diversification opportunities.</li><li>• Improving Angora genetics and reproduction.</li><li>• Using livestock products (e.g. meat) other than fibre.</li><li>• Fostering appropriate value-adding in processing.</li><li>• Developing more international linkages for research and industry leaders.</li><li>• Advertising and promoting existing R&amp;D publications online.</li><li>• Participating in regenerative farming movement.</li><li>• New market opportunities post-COVID-19.</li><li>• Demonstrating profitability of goat enterprise.</li><li>• Provenance and traceability.</li></ul>	<ul style="list-style-type: none"><li>• Lack of supply of Angora animals limits growth.</li><li>• Decline in large-volume producers.</li><li>• Exotic and endemic diseases.</li><li>• Less promotion of existing research documents and recommendations.</li><li>• Limitations with chemical registrations.</li><li>• Ethical activist attacks.</li><li>• ‘Lab’ fibre versus natural fibre.</li></ul>



Financial position and investment projections

The AgriFutures Goat Fibre Program is funded by the statutory goat fibre levy of 1.5 per cent of the sale value of the goat fibre, which is paid by industry participants. AgriFutures Australia also receives matching funding from the Australian Government.

Levy value over recent years has declined, with anecdotal evidence suggesting the decline is attributed in part to a contraction of the industry, as well as some producers selling fibre direct to export markets.

Year-to-date (28 February 2021; financial year) revenue was \$15,000, with levy revenue over the past five financial years outlined below.

The Goat Fibre Program has a reserve of approximately \$574,000. The reserve is a result of a one-off payment from the Australian Government due to historic underpayment of matching funding. A reserve policy needs to be established between AgriFutures Australia and the industry to ensure appropriate resourcing of this RD&E Plan.

AgriFutures Australia receives the research and development (R&D) levy allocation to invest in line with the industry objectives detailed in the RD&E Plan. The levy is collected and distributed via the Department of Agriculture, Water and the Environment.

AgriFutures Australia also receives matching funding from the Australian Government, calculated under the PIRD Act. Subject to some limitations, this Commonwealth matching funding is capped at the lesser of 50% of eligible expenditure (across the organisation) or 0.5% of industry gross value of production (GVP). Industry GVP is calculated on the aggregate of all AgriFutures Australia levied industries.

AgriFutures Australia’s Board allocates the Commonwealth matching funding to each levied industry program. The respective programs receive 50c per dollar of eligible expenditure (subject to availability of Commonwealth matching funding).

Goat fibre levy summary

2015-16	2016-17	2017-18
\$28,581.95	\$33,915.71	\$21,100.40

Industry consultation

Preparation of the Strategic RD&E Plan

The AgriFutures Goat Fibre Program Strategic RD&E Plan (2021-2026) was developed in consultation with goat fibre industry representatives through several informal key informant interviews and a RD&E strategy workshop held on 22 April 2021 in Wagga Wagga.

Additional consultation on the draft strategy was done through an online workshop on 1 June 2021.

A list of industry representatives who participated in consultation activities during development of the Plan is provided in Appendix 1.

2018-19	2019-20
\$12,289.92	\$25,243.86





## AgriFutures Goat Fibre Program Strategic RD&E Plan (2021-2026)

### Program goal

Grow the size, production, reputation and value of the Australian goat fibre industry.



# AgriFutures Goat Fibre Program Strategic RD&E Plan (2021-2026)

1

Priority – Sustainable growth in the number of producers productively contributing to the goat fibre industry.

Objective

Demonstrate the commercial viability and opportunities within the industry to underpin succession and production viability strategies.

Justification

This priority aims to underpin the industry’s succession and production viability strategies by assessing its current capacity and supporting strategies to increase its commercial size, production volume, reputation and value.

Strategies

- 1.1

Research production characteristics of the industry.
- 1.2

Document and communicate industry characteristics.

Activities

- 1.1.1

Undertake industry-wide survey of goat fibre producers to ascertain their locations, scales, future succession plans and production volumes (current/forecast) – by 2022.
- 1.2.1

Develop industry case studies to demonstrate production gross margins and benchmarks at business scale and in the operating environment – by 2022.
- 1.2.2

Prepare communication resources to support the appeal and development of the industry – by 2022.

Timing

Priority 1 activities will support the design and geographic focus of Priority 2 activities. These activities should be completed in the first half of the Plan, by 2022.

Key performance indicators

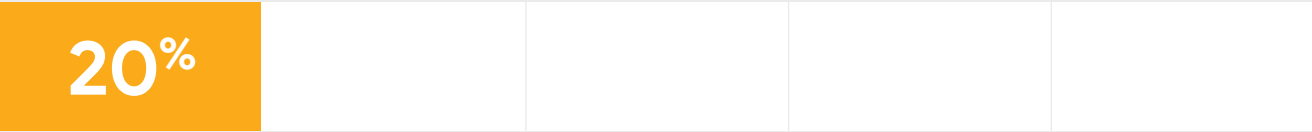
- The industry-wide survey has been completed and participants understand the size and scale of the industry (number of members, total value of production, total volume of production, total number of goats, future intentions).
- Industry case studies have been produced and disseminated.
- Communication resources support the appeal and development of the industry. There is a change in the number and scale of industry producers, and there are enquiries from prospective new industry entrants.

Risk management

Several inherent risks that could prevent this priority from being achieved will need to be managed, including:

- Identification of geographic location of goat fibre producers – medium risk
- Availability of information to support new entrants to the industry – low risk.

Indicative share of RD&E budget



2

Priority – A collaborative industry that produces consistent and quality goat fibre.

Objective

Support industry participants and prospective entrants to the industry to increase their skills, knowledge and capacity in goat management for fibre production.

Justification

This objective aims to support industry participants and prospective entrants to the industry to increase their skills, knowledge and capacity in goat management for fibre production. This will be done through employing an Industry Development Officer and through industry field days, events, study tours and the dissemination of communication material.

Strategies

- 2.1

Enhance industry relationships and collaboration.
- 2.2

Improve access to technical advice and extension services.

Activities

- 2.1.1

Employ an Industry Development Officer – commencing 2022.
- 2.1.2

Coordinate industry field days, events, study tours and other identified activities – commencing 2023.
- 2.2.1

Consolidate and distribute industry information resources – commencing 2023.

Timing

Priority 2 activities are dependent on substantive progress against Priority 1 activities. The delivery of Priority 2 activities will be dependent on securing industry contribution to the levy through onshore sales. Priority 2 activities should commence planning and delivery by the latter half of 2022.

Key performance indicators

- An Industry Development Officer is in place.
- Industry field days, events, study tours and other activities happen annually.
- Industry information resources are produced and disseminated. Producers are accessing technical advice and extension services through industry participation. Producers are demonstrating adoption of improved practices for goat fibre quality.

Risk management

Several inherent risks that could prevent this priority from being achieved will need to be managed, including:

- Inability to find an appropriate Industry Development Officer – low risk.
- Lack of technical skills and knowledge on goat fibre production in the industry – medium risk.

Indicative share of RD&E budget





# Communication, extension and adoption of RD&E outcomes

The Goat Fibre Program Strategic RD&E Plan will be available via the AgriFutures Australia website, and made accessible to all key stakeholders.

There is a strong appetite for improved and effective communication and extension of existing RD&E information within the goat fibre industry, and this is expected to apply to this RD&E Plan.

Given the small and fragmented scale of the sector, an Industry Development Officer, as aligned to Priority 2, will play a key role in raising awareness of the RD&E Plan and its strategies and expected outcomes, as well as other communication, extension and adoption activities for the industry. As there is no dedicated communication or extension program for the goat fibre industry, industry associations and AgriFutures Australia will also play important roles in raising awareness of the RD&E Plan.

Communication should involve a mix of face-to-face delivery across key production areas, as well as online delivery, using both soft and hard copy resources for support.

For engagement with the RD&E Plan to be successful, it is essential that the contributions and collaboration of all key stakeholders is effectively managed. This will increase the awareness and adoption of outcomes and encourage practice change.

Further information on the key target audiences, suggested communication channels, communication and extension activities and levels of engagement\* are outlined in Table 4.

The levels of engagement are based on the IAP2 Spectrum of Public Participation.

\* Levels of engagement:

**Inform** – To provide information to assist stakeholders to better understand the issue, and/or identify alternatives, opportunities and/or solutions to the issue.

**Consult** – To obtain feedback from key stakeholders on the issue, alternatives and/or outcomes.

**Involve** – To engage directly with key stakeholders throughout the project, to ensure that major concerns and needs are understood and considered.

**Collaborate** – To partner with key stakeholders to develop/ evaluate solutions to problems, to make decisions, to provide advice and to identify preferred solutions.

**Empower** – To deliver solutions and/or the ability for informed decision-making in the hands of the stakeholder. Stakeholders are then enabled to directly contribute to the achievement of project outcomes.

Table 4: Market segmentation of key communication audiences in the goat fibre industry

Target audience	Communication channels	Communication and extension activities	Level of engagement goal
Goat fibre producers	Industry Development Officer.	Share information via articles and publications, fact sheets, case studies (written and video), workshops and field days.	Empower
	AgriFutures Australia communications channels.		
	Industry websites, e-newsletters, social media, webinars, videos and podcasts.		
Industry associations (Mohair Australia Limited and Australian Cashmere Growers Association)	Industry Development Officer.	Share information via articles and publications, fact sheets, case studies (written and video), workshops and field days.	Collaborate
	Industry websites, e-newsletters, social media, webinars, videos and podcasts.		
	AgriFutures communications channels.	Consider developing an online hub of information resources for producers and industry.	
Supply chain participants (Australian Mohair Marketing Organisation, Cashmere scourers)	Industry Development Officer.	Share information via articles and publications, fact sheets, case studies (written and video), workshops and field days.	Consult
	Industry websites, e-newsletters, social media, webinars, videos and podcasts.		
	AgriFutures Australia communications channels.		
Researchers and service providers	Industry Development Officer	Invite researchers and service providers to share projects relating to RD&E priorities.	Consult
	Industry websites, e-newsletters, social media, webinars, videos and podcasts.		
	AgriFutures Australia communications channels.		
Department of Agriculture, Water and the Environment	AgriFutures Australia communications channels.	Demonstrate that the goat fibre sector has prioritised its RD&E needs to secure matching levy contributions.	Consult
AgriFutures Australia	Industry Development Officer.	Targeted consultation with producers and industry to ensure strong industry ownership of the RD&E Plan.	Involve
	Industry websites, e-newsletters, social media, webinars, videos and podcasts.		



Monitoring, evaluation and reporting (MER) framework

Alignment with the AgriFutures Australia MER framework

A monitoring, evaluation and reporting (MER) framework developed for the goat fibre industry is outlined in Table 5. The framework is aligned to the AgriFutures Australia MER framework, which provides a standardised ‘logic’ to describe how inputs are used to generate benefits from RD&E investments.

Performance expectations, including suggested indicators and measures, have been established to assess progress over the life of the Plan. The key performance indicators are described in the framework, with costs associated with tracking at the activity level to be met by prospective research service providers.

Evaluation of the plan

It is important that the Goat Fibre Program Strategic RD&E Plan be reviewed periodically to assess whether satisfactory progress is being made to meet the identified KPIs, and if the KPIs themselves are still the most appropriate ones. It is suggested that a mid-term review be scheduled towards the end of year three.

The outcomes of the mid-term review should be formally reported to stakeholders and, if needed, an action plan implemented by AgriFutures Australia to rectify any deficiencies.

Provision should also be made for a formal review at the end of the Plan. This review should be completed prior to the commencement of planning for the next period. The form of the review should be appropriate to the size of the total investment. It need not be onerous or expensive – it may simply involve a scheduled review session by the Advisory Panel. However, some level of independence in the review process is preferable.

Table 5: AgriFutures Goat Fibre Program monitoring, evaluation and reporting (MER) framework

Priority	Activities	KPIs	Timing
<div>1</div> <div>Sustainable growth in the number of producers productively contributing to the goat fibre industry.</div>	1.1.1. Undertake industry-wide survey of goat fibre producers to ascertain their locations, scales, future succession plans and production volumes (current/forecast).	The industry-wide survey has been completed and participants understand the size and scale of the industry (number of members, total value of production, total volume of production, total number of goats, future intentions).	By 2022
	1.2.1. Develop industry case studies to demonstrate production benchmarks at business scale and in the operating environment.	Industry case studies have been produced and disseminated.	By 2022
	1.2.2. Prepare communication resources to support the appeal and development of the industry.	Communication resources support the appeal and development of the industry. There is a change in the number and scale of industry producers, and there are enquiries from prospective new industry entrants.	By 2022
<div>2</div> <div>A collaborative industry that produces consistent and quality goat fibre.</div>	2.1.1. Employ an Industry Development Officer.	An Industry Development Officer is in place.	Commencing 2022
	2.1.2. Coordinate industry field days, events, study tours and other identified activities.	Industry field days, events, study tours and other activities happen annually.	Commencing 2023
	2.2.1 Consolidate and distribute industry information resources.	Industry information resources are produced and disseminated. Producers are accessing technical advice and extension services through industry participation. Producers are demonstrating adoption of improved practices for goat fibre quality.	Commencing 2023







Plan implementation and governance

Program management

The AgriFutures Goat Fibre Program will have a Research Manager and Research Coordinator committed to it. The Research Manager will work closely with representatives from the goat fibre industry (mohair and cashmere) to implement the RD&E Plan.

AgriFutures Australia will request proposals via an open call process focused on the specific programs and priorities outlined within this strategy. Proposals will be assessed by AgriFutures Australia in partnership with the industry representatives.

Risk management

Several risks relevant to the goat fibre industry and specifically to the achievement of outcomes within this RD&E strategy have been identified. These risks will require management if project outcomes are to be achieved. The risks and how they will be managed (mitigation strategies) are presented in Table 6.

Table 6: Risk management plan

Risk description	Source of risk	Uncontrolled risk level
Unknown geographic locations of goat fibre producers.	The last industry survey was completed in 2004 and gaps in knowledge exist in relation to the locations and extent of goat fibre production nationally.	Medium
No information to support new entrants to the industry.	Sufficiency of historic industry research and the appropriateness of format to support new industry participants.	Low
Inability to find an appropriate Industry Development Officer.	Limited skills and capacity in goat fibre management and broader challenges with attraction of skilled labour in rural and regional industries.	Low
Lack of technical skills and knowledge on goat fibre production in the industry.	Limited skills and capacity in goat fibre management.	Medium

Mitigation strategies	Acceptable/unacceptable	Responsibility
Use supply chain participants, including markets and processors, to distribute industry survey to producers.	Acceptable	Industry associations (with support of supply chain participants).
Strategy activities supporting the development of communication resources.	Acceptable	Industry Development Officer.
Opportunities for partnerships with government agencies, other service providers and/or sole traders to identify appropriate candidate(s) to fill Industry Development Officer role.	Acceptable	Host organisation for Industry Development Officer.
Strategy activities supporting the development of strengthened technical capacity and knowledge sharing.	Acceptable (with monitoring)	Industry Development Officer; Industry associations (with support of supply chain participants).



Appendices

Appendix 1: Consultation participants

Table 7: Consultation participants during Plan development

Name	Industry/organisation
Adam Pate	Animal Health Australia
Andrew James	Cashmere
Charlie Bell	Mohair
Clinton Muller	RMCG (Consultant)
David Lillis	Mohair
David Williams	Mohair/AMT
Dimi Kyriakou	RMCG (Consultant)
Doug Nicholls	Mohair
Grant Forsdick	Mohair
GT Ferreira	Mohair
Helen Cathles	Mohair
Ian Cathles	Mohair
John Falkenhagen	Goat Industry Council Australia
John Hoornweg	Mohair
John Smith	AgriFutures Australia
Justine Hall	Mohair
Kimberly Barrett	Mohair
Lynne Carter	Mohair
Margaret Nicholls	Mohair
Marina Ferreira	Mohair
Nick Gorrie	Mohair
Olivia Luff	AgriFutures Australia
Peter Simpson	Mohair
Raymond Williams	Mohair
Simon Humphrys	Animal Health Australia
Stephen Chaffey	Consultant
Susan Jordan	Mohair







**AgriFutures<sup>®</sup>**  
Goat Fibre

---

## **AgriFutures Australia**

Building 007  
Tooma Way  
Charles Sturt University  
Locked Bag 588  
Wagga Wagga NSW 2650

02 6923 6900  
[info@agrifutures.com.au](mailto:info@agrifutures.com.au)

[agrifutures.com.au](http://agrifutures.com.au)

