

The Lamb Market

- 2020-2021: Tremendous consumer demand (retail sales) as more meals were cooked at home
 - Record high lamb prices
- 2022: Lamb retail sales down 4.7%, retail prices increased in every region, AU imports up 6%
 - Inflation – consumer demand for lamb is challenged by higher prices for food (including lamb) and other goods/services
 - Price is the #1 barriers for consumers to purchase more lamb

Foodservice Challenges

- Inflation/ food costs and labor shortages
 - Fine dining permanent closures
 - Reduced hours
 - Menu simplification
 - 60% of restaurants have reduced their menus





Your Lamb Checkoff

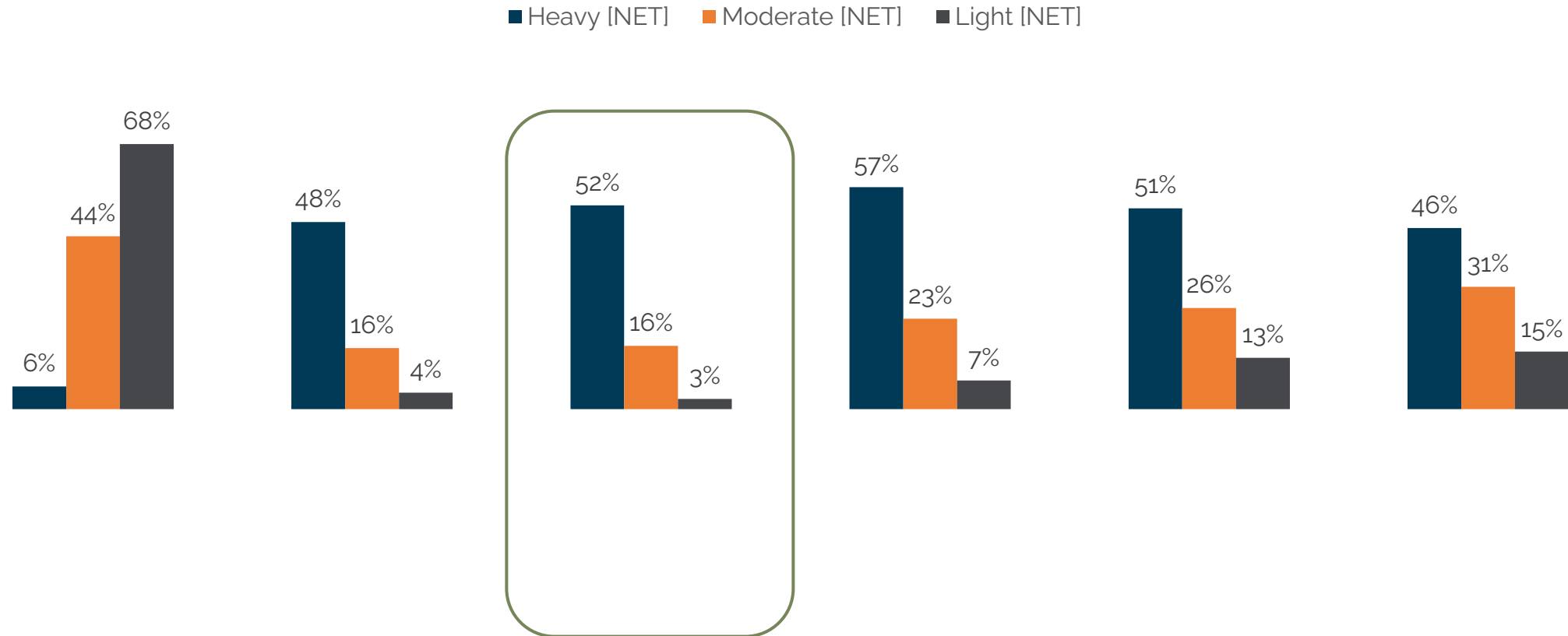
- Build demand for American Lamb and increase our competitiveness
 - Educating customers and consumers about the benefits American Lamb
 - Protecting our premium positioning
 - Exploring new opportunities and channels
 - Leveraging consumer trends
- Support our contributors and industry partners

Frozen Lamb Opportunities Study

- Overall, no red flags for frozen product; premium perception should remain intact.
- Similar demographics between fresh and frozen consumers.
- Barrier to purchase any lamb: Lamb not readily available at grocery store, which presents the opportunity to push frozen option to retailers (reduce loss risk with frozen product).
- Online purchasing already happening by majority of lamb consumers. Meat-specific delivery service (23%) indicates willingness to purchase frozen/suspended fresh lamb.
- During the COVID-19 pandemic, consumers developed a habit of keeping extra meat in their freezer (55% of meat consumers report freezing more meat/chicken than normal), indicating they have little/no issue with once-frozen meats.
- Likely that the preference for U.S. origin likely to outweigh preference for fresh vs. frozen.

Online Purchase Outlets by Group

Heavy lamb purchasers are the most likely group to purchase lamb online – 94% of heavy lamb purchasers have used an online method to purchase lamb in the past year.



Premium, Meat-only E-commerce

Some of the premium meat delivery services are now offering lamb:

- Allen Brothers: large selection with descriptors of “natural,” “Australian” and “domestic”
- D’Artagnan: large selection of “Australian” and “domestic”
- ButcherBox: no lamb
- Crowd Cow: small selection, from Capra.

CROWD COW Shop Gifts Cooking About

Search by cut, farm, breed, etc.

Pasture-Raised Bison Dorper Lamb



Dorper sheep are highly regarded as a prime lamb producing breed as they are fast maturing with the ability to produce high quality meat with excellent fat distribution. Capra Foods has developed and deployed holistically designed practices of regenerative agriculture throughout their entire network of ranches based in Australia. These practices are proven to increase biodiversity, enrich soils, improve watersheds, and enhance ecosystem services. This is good for the ranchers, the land, the animals and the food system we all depend on. Regenerative agriculture is paving the way for a healthier future. It all starts from the soil up!

[Shop Now >](#)

Bison & Lamb

[Shop A](#)

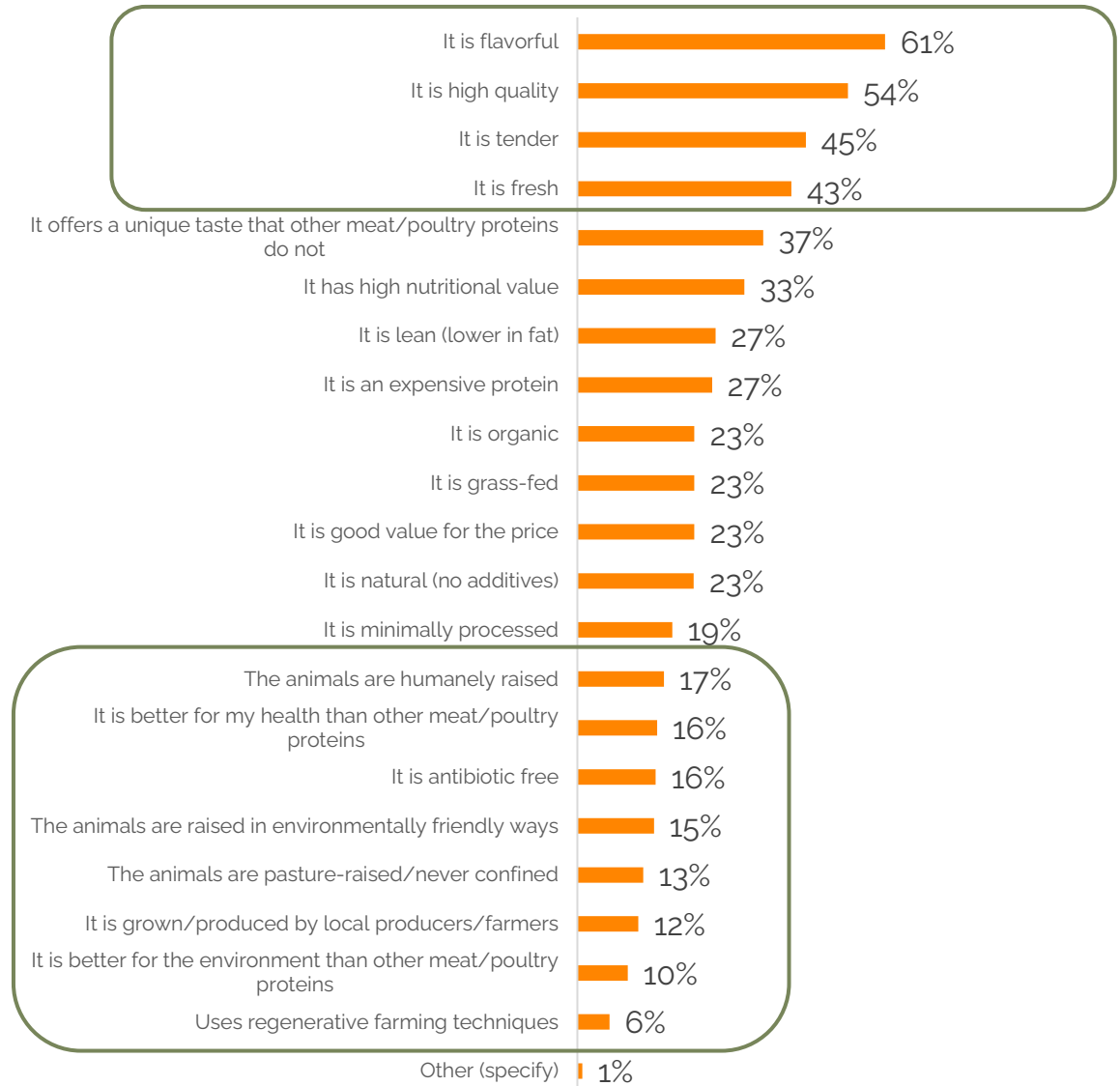


Consumer Trend Opportunities

- Health & Wellness/Plant Based/Flexitarians
- Sustainability
- Value added products - convenience
 - Meat Snacks and Charcuterie
 - Global Flavors

Associations with Lamb

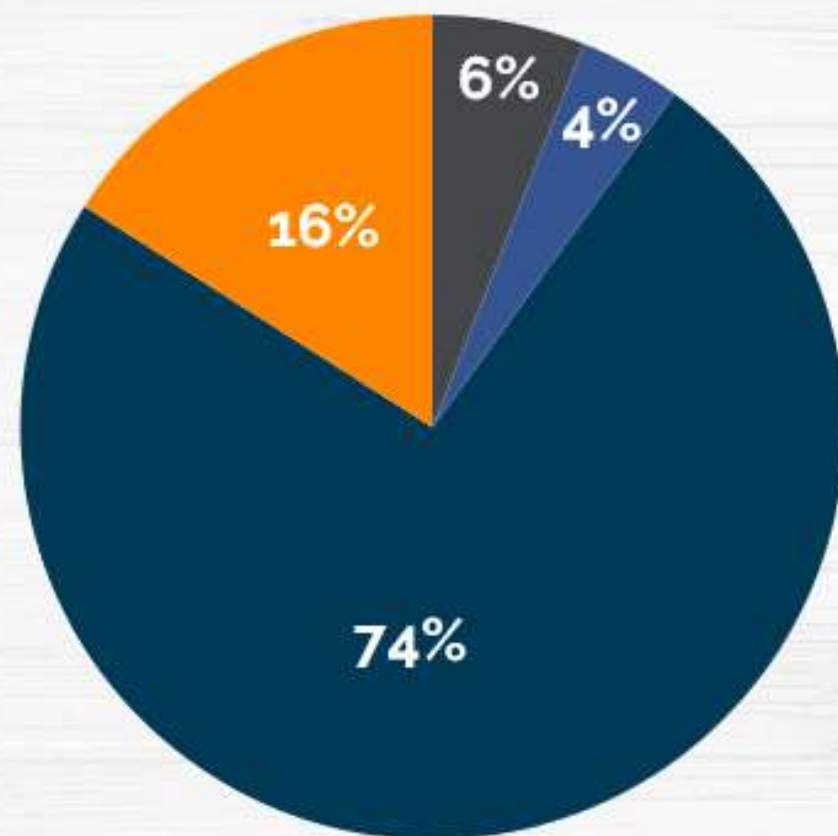
- Lamb is most associated with flavor, quality, tenderness and freshness.
- Lamb is less frequently associated with sustainability claims - being environmentally friendly, humanely raised etc.
 - Opportunity to increase lamb purchases



Eating Meat is the Norm

69%

Of flexitarians believe meat belongs in a healthy diet.



■ Meat Eater ■ Flexitarian ■ Vegetarian/vegan ■ Pescatarian

Health and Wellness

- Consumers don't see meat as inherently unhealthy but are striving to eat less of it.
- Meat as an ingredient - many fast casual restaurants are targeting this group by offering smaller servings of meat alongside other high protein ingredients.
- Lamb offers smaller portions – a little goes a long way
- Lamb has a great production story



Sustainability

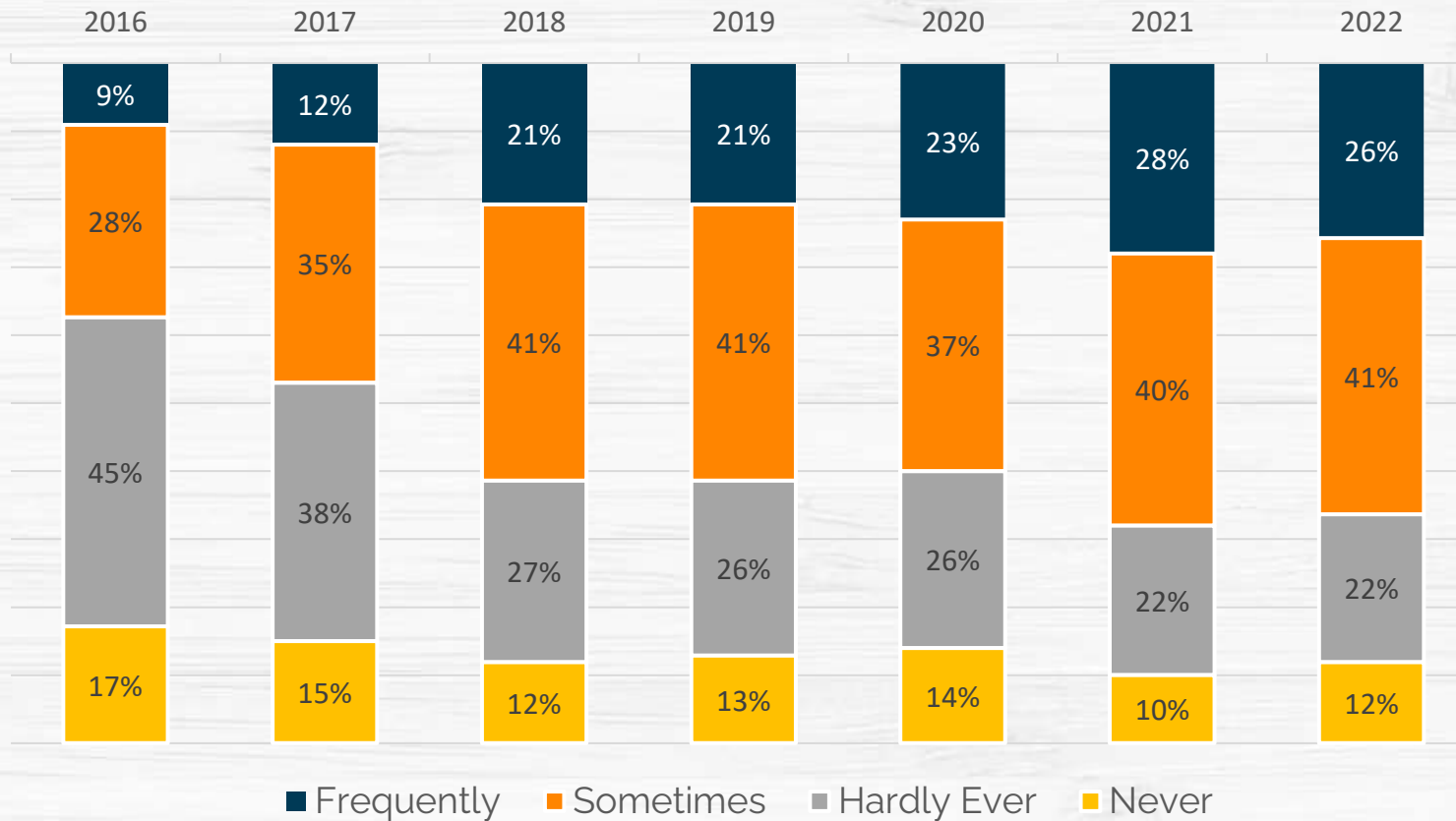


Sustainability Programs

- Environmental Footprint Study-Michigan State University
- New Public Facing Sheep Sustainability Report – Our commitment
- USDA Climate Smart Grant - quantify the climate benefits and emissions of prescribed sheep grazing in different parts of the country
- New grazing videos communicating the benefits of sheep



Value Added Meats Grow in Popularity

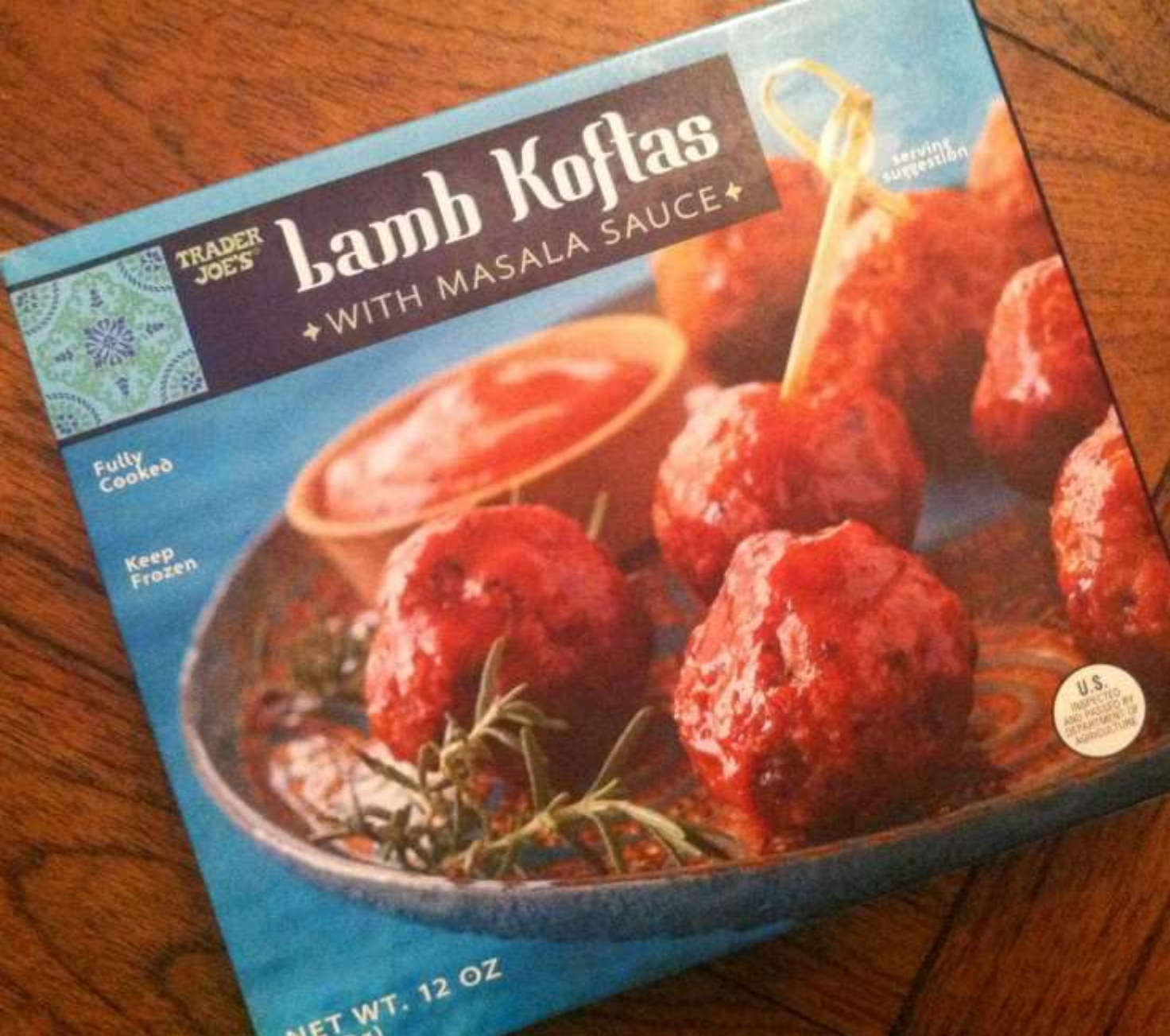


67%
regularly buy
value added
proteins



Value Added Product Opportunities

- High Protein Snacks and Charcuterie Boards – Lamb Salami, Lamb Jerky
- Convenient heat and serve meal options – both fresh and frozen
 - Global Flavor Bowls
 - Merguez Sausage Breakfast Burrito
 - Mediterranean Meatballs
 - Lamb Stew



Frozen Meals

The number one reason consumers are purchasing value added meals is convenience - it saves time.

Most (72%) frozen food consumers aren't choosing between fresh or frozen foods, they're purchasing both.

New Programs for 2023

- Re-engage with Consumers, Media, and Chefs in Target Markets
 - Lamb Jam Restaurant Month – MAY
- Support for Restaurants and Retailers Committed to American Lamb
- Focus on Health and Wellness/Sustainability
 - Promoting Grazing Video/Sustainability Report
 - Wine Country Grazing Retreat for Influencers
 - Local Market Lamb Dinners/Video
 - Nutrition Workshops and Conferences
 - Nutrition Media Spokespeople
 - Fun Runs in Target Markets – Run with Our Flock



Supporting Contributors

- Free promotional materials and other marketing tools
- Sponsorship program designed to expand demand and build activities in local areas the ALB is not active
- Retail support for American Lamb suppliers
- Support for young leader programs and industry education
 - Lamb Summit
 - NLFA Leadership School
 - Global Sheep Forum

Thank Ewe

QUESTIONS & FEEDBACK

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MORE INFO AND RESOURCES

- LambResourceCenter.com
- [Facebook/LambCheckoff](https://www.facebook.com/LambCheckoff)
- Weekly newsletter

