WHO WE ARE

The American Lamb Board is your national Checkoff, working to build demand for American Lamb

All sectors are represented: producers, feeders, processors, and seedstock

All activities are overseen by the USDA

Programs are implemented by staff in Denver, Colorado

AMERICAN LAMB BOARD MEMBERS

Jim Percival, Chairman (OH)  Elizabeth Dressler (CO)
Greg Ahart (CA)  Gwen Kitzan (SD)
Brad Anderson (CO)  Diane Peavey (ID)
Martin Auza (AZ)  David Quam (TX)
Peter John Camino (WY)  Sally Scholle (PA)
Tom Colyer (ME)  Dale Thorne (MI)
Greg Deakin (IL)
2018 FINANCIALS

<table>
<thead>
<tr>
<th>Category</th>
<th>Amount</th>
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<tbody>
<tr>
<td>Promotion</td>
<td>$1,599,675</td>
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<tr>
<td>Communications</td>
<td>$441,204</td>
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<tr>
<td>Research</td>
<td>$121,162</td>
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<td>USDA Oversight</td>
<td>$75,838</td>
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<tr>
<td>Administration</td>
<td>$174,903</td>
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<tr>
<td><strong>Total Expenses</strong></td>
<td><strong>$2,412,782</strong></td>
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OUR ROLE—MARKETING, RESEARCH, AND INDUSTRY COLLABORATION
Making decisions based on solid information

1. An updated Datassential MenuTrends™ menu study to track lamb use and trends in foodservice.

2. A US consumer market research study that quantifies information about US consumer usage of lamb as well as their thoughts and perceptions.
LAMB ON THE MENU—2018 MENU STUDY HIGHLIGHTS

**Rack of lamb** remains the most popular cut of lamb featured on fine dining menus followed by lamb chops (unspecified), shank, and sausage.

**Merguez** (a lamb sausage with North African spices) is one of the fastest growing entrée proteins mentioned on fine dining menus.

**The highest menuing of lamb** appears on Indian, Mediterranean, and African menus.

**Lamb burgers** are being found on more and more menus—up 26 percent in the last four years (2014 compared to 2018).
CONSUMER STUDY HIGHLIGHTS

Research shows that the most-liked attributes of lamb are flavor, unique taste, and tenderness.

Respondents indicate that price and lack of availability are the top barriers to purchasing more lamb.

68% of respondents in 2018 indicate a preference for lamb from the US, up from 40% in 2011.

In 2018, 43% of respondents indicate they will likely purchase lamb in the next 6 months, up from 30% in 2011.

35% of respondents who eat lamb said they like everything about lamb, up from 19% in 2011.

Consumer intimidation about lamb is declining.

:: In 2018, only 15% of respondents indicated they felt lamb was too difficult to prepare, down from 45% in 2011.
Marketing Strategies—Strategic Investments with a Small Budget

1. Focus on building awareness and demand in large, diverse target markets where consumers have access to American Lamb at restaurants and retailers: Austin, Boston, DC, San Francisco, and Seattle.

2. Increase lamb usage among consumer target groups that already like and/or are interested in lamb.

3. Expanding our reach through partnerships with influencers resulting in an impressive total of a combined reach of **almost 2 million** and **over 70 recipes**.

4. Utilize digital/social media as a cost-effective way to educate and inspire consumers and promote year-round lamb usage with recipes, videos, cut and cooking tips, nutrition information, and fun events.
Delicious Date Night

Facebook Followers 47,496

Instagram Followers 10,052

Looking for a Delicious Date Night?!

Feeding Your Adventurous Side
AmericanLamb.com
Influencer Programs

The American Lamb Board works to educate and build partnerships with influencers including journalists, chefs, food bloggers, a nutritionist, and dieticians to expand awareness, reach more consumers with American Lamb messages and curate interesting content including recipes, photos, and videos.
I am both a meat eater and an animal lover. My experience at Five Marys helped me to reconcile those two seemingly contradictory points of view. While it can be hard for some people to see (and sure it may turn some into vegetarians) I think that observing the process through from start to finish gives one an appreciation for the food that we eat. I try to eat smaller portions of high quality and better-sourced meat, from farms where I know that the animal has had the best life it possibly could have had. I don’t want processes to be hidden because I want to know that the food I am eating has been raised the best possible way.
NUTRITION WORKSHOPS

“This trip is one for the books! I learned a lot and will definitely be putting my knowledge about lamb to good use for my blog, social media, and in my cooking classes. I definitely need to figure out an Instant Pot lamb recipe to post!”

—Julie Harrington, RD and Chef

“I can’t stop talking about how much fun I had—from everything I learned, to the people, and the food; the entire experience was wonderful. It shows that you all care about the connection between product, nutrition professional, and consumer, which is extremely valuable.”

—Dana Harrison, MS
CHEF "BAAAAA-RUNCH" SERIES
MEDIA EVENTS

The American Lamb Board hosted three Curriculamb workshops for food media in 2018:

1. Meredith Publications Food Studio, Birmingham, Alabama (including representatives from Food and Wine, Cooking Light, Southern Living, Midwest Living, Real Simple, and more)

2. Martha Stewart Living, New York

TASTING TABLE DIGITAL MEDIA PARTNERSHIP

The partnership included:

NYC Influencer Event—5 course lamb dinner with 10 Instagrammers (combined reach of 686,000 consumers)

Social media posts and e-blast promoting Lamb Jam events

E-blasts to consumers

Custom content on tastingtable.com and their social platforms, including two Lamb Lovers Month recipe roundups and one custom summer grilling video

:: Delivered 17,310,052 impressions

Total views (benchmark/average is 10,000)

:: Lamb Lovers Month = 49,397 page views
:: Summer Grilling = 26,319 page views
:: Lamb Burger video = 81,319 page views
CHEF LAMBASSADORS

26 new foodservice recipes
13 new consumer recipes

Two broadcast segments for chef ambassador partners—Channel 8 in DC (ABC affiliate) with Chef Michael Costa, and Channel 10 in Boston (NBC affiliate) with Chef Karen Akunowicz

BLOGGER LAMBASSADORS

31 new recipes
7 new videos
43 new posts/social media mentions

Total reach for 2018 = 980,662
Consumer Events

IN TARGET MARKETS

Reaching consumers in target markets with product sampling and education, making lamb more approachable.

In 2018, the American Lamb Board participated in 24 events and festivals across the US. Also, the American Lamb Board hosts its own events in target markets:

:: Cooking workshops for consumers focused on easy appetizers with ground lamb

:: Lamb Jam chef competition and tasting series
54% new to Lamb Jam!
18% year-over-year increase

<table>
<thead>
<tr>
<th>Location</th>
<th>Tickets Sold</th>
<th>Total Attendees</th>
</tr>
</thead>
<tbody>
<tr>
<td>Austin</td>
<td>351</td>
<td>515</td>
</tr>
<tr>
<td>Boston</td>
<td>403</td>
<td>501</td>
</tr>
<tr>
<td>DC</td>
<td>312</td>
<td>411</td>
</tr>
<tr>
<td>Seattle</td>
<td>482</td>
<td>507</td>
</tr>
<tr>
<td>SF</td>
<td>437</td>
<td>519</td>
</tr>
<tr>
<td>Total</td>
<td>1,985</td>
<td>2,353</td>
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</table>

85% Satisfied with Lamb Jam

"Overall, how satisfied were you with the Lamb Jam event?"

<table>
<thead>
<tr>
<th>Location</th>
<th>Very Satisfied</th>
<th>Somewhat Satisfied</th>
<th>Neutral</th>
<th>Not Satisfied</th>
</tr>
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<tbody>
<tr>
<td>Austin</td>
<td>54%</td>
<td>33%</td>
<td>10%</td>
<td></td>
</tr>
<tr>
<td>Boston</td>
<td>56%</td>
<td>33%</td>
<td>11%</td>
<td></td>
</tr>
<tr>
<td>DC</td>
<td>45%</td>
<td>36%</td>
<td>11%</td>
<td>9%</td>
</tr>
<tr>
<td>Seattle</td>
<td>40%</td>
<td>44%</td>
<td>11%</td>
<td></td>
</tr>
<tr>
<td>SF</td>
<td>45%</td>
<td>42%</td>
<td>9%</td>
<td></td>
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<tr>
<td>Total</td>
<td>48%</td>
<td>47%</td>
<td>10%</td>
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</table>
56% ask for American Lamb!

"Having attended Lamb Jam, how likely are you to ask your grocery or butcher if they carry American Lamb?"

<table>
<thead>
<tr>
<th></th>
<th>Much more likely</th>
<th>More likely</th>
<th>No change</th>
<th>Not likely</th>
<th>Not at all likely</th>
</tr>
</thead>
<tbody>
<tr>
<td>DC</td>
<td>21%</td>
<td>29%</td>
<td>34%</td>
<td>5%</td>
<td>11%</td>
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<tr>
<td>SEATTLE</td>
<td>15%</td>
<td>44%</td>
<td>35%</td>
<td></td>
<td></td>
</tr>
<tr>
<td>SF</td>
<td>15%</td>
<td>43%</td>
<td>31%</td>
<td>9%</td>
<td></td>
</tr>
</tbody>
</table>

Chefs' Feedback

100% participation was worth the time and effort
90% provided great exposure
98% would participate again
88% satisfied with event communication

Our Lamb Jam attendees are:
ADVENTUROUS, PASSIONATE AND NOT PRICE SENSITIVE

72% like to try new foods
52% are passionate about their local food scene
85% would pay more for locally-sourced foods
55% have incomes $100K and above

REAL-LIFE INFLUENCERS

73% regularly share culinary experiences with others
70% say people come to them for food and restaurant advice
FOODSERVICE PROGRAM HIGHLIGHTS

More than $200,000 in foodservice trade publicity

Educational infographic sheets

New catering materials

Online “Curriculamb” education class

5 new live firing cooking videos

The local lamb message

Lamb tour and fabrication demonstration
YOUNG LEADER PROGRAM—
2018 LAMB EX AUSTRALIA WITH ATTENDEES DAVID FISHER AND REBECCA MILLER

The trip was a meeting of the minds in the truest sense. The young leaders I got to know are driven and passionate about the future of sheep farming. The shepherds I met from all over care deeply about their roles to feed and clothe the world. THESE PEOPLE ARE WHY I LOVE THE SHEEP INDUSTRY, here, in the US, and abroad.

—Rebecca Miller
PROMOTIONAL MATERIALS
The American Lamb Board develops a number of promotional items to help the industry promote American Lamb at farmers markets, fairs, and festivals.

SUPPLIER COOPERATIVE FUNDING PROGRAM
The American Lamb Board partnered with six different lamb suppliers on branded promotions that leveraged an additional $33,000 invested in promoting American Lamb.
Local Lamb Funding Program

The American Lamb Board supported 29 local lamb projects including:

- **Kansas Sheep Association and Missouri Sheep Producers**—Missouri and Kansas Academy of Nutrition and Dietetics Joint Annual Conference Sponsorship
- **Jacobsen Ranch/Merced Feast**—California Farm to Table Lamb Dinner
- **Idaho Wool Growers Association**—educational activities and lamb lunch at Boise Farmers Market
- **South Dakota Sheep Grower Association**—lamb sampling at various local consumer events
- **Wyoming Wool Growers and Mountain States Rosen**—chef training and ranch tour
- **Indiana Sheep Association**—sampling and education at the Indiana State Fair
- **Ohio Sheep Improvement Association**—lamb sampling and education booth at the Ohio State Fair
- **MD, PA, West VA Meat Goat and Sheep Association**—chef demonstration and sampling
- **Freedom Run Farm**—Lamb Jam Louisville
- **Meeker Sheepdog Festival**—lamb sampling and demonstration at sheepdog festival
- **Eastern States Exposition Agriculture and Education**—chef cooking demonstrations and lamb sampling
- **Monroe County Sheep Producers Association**—Lamb Lunch at local craft festival
SPONSORSHIPS

1. The Trailing of the Sheep Festival

2. Howard Wyman Leadership School

3. The American Meat Science Association Meat Judging Program
INDUSTRY MEDIA RELATIONS

1. Attended the Farm Broadcasters Conference and the Ag Media Summit

2. Distributed three editorial packages to ag media—the new "Feed Your Adventurous Side" positioning, the new Consumer Research, and the Lamb Seasonality White Paper

3. Hosted a webinar for trade media

These efforts resulted in:
- 59 print and digital placements
- 14 radio interviews
- 6 TV/broadcast interviews
Research & Education

to improve quality of American Lamb

2018 Highlights:

1. A white paper on the seasonality of lamb production in the US

2. Working with Colorado State University to complete Phase II of the lamb flavor research

3. Collaborating with the University of Wyoming to quantify the cost and economic losses due to over-fat lambs

4. The American Lamb Board continues to support programs that increase production efficiencies and improve lamb quality, including NSIP (National Sheep Improvement Program)