Lamb: From Carcass to Case: Trends, Cuts, and Consumer Connection

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2025 Heavy Lamb User Demographics

Heavy lamb users at home were more likely to be:

- Males
- Gen Z
- Millennials
- Households with kids
- Connected Trendsetters
- African Americans
- Hispanics
- Those in the South
- Urban residents
- Incomes of $100K+

Source: ALB 2025 Lamb Consumer Report

Millennials

people aged 25 – 44

In 2025, Millennials account for 28.3% of all U.S. retail spending, totaling $1.127 trillion annually.

Their average annual retail spending is $31,256, which is 6.16% higher than the average consumer.

🛍️ Shopping Behaviors & Preferences

Millennials are more likely to shop online, but still value in-store experiences. They are 19% more likely to prefer online shopping than Gen Z.

🧠 Strategic Implications for Brands

Millennials, while still powerful spenders, are more budget-conscious and value-driven, often influenced by life stage factors like homeownership and family planning.

Gen Z

people aged 10 - 24

Gen Z's collective buying power is estimated at $150 billion in the U.S. alone.

Globally, their income is projected to grow 400% by 2030, reaching $33 trillion, surpassing Millennials by 2031.

🛍️ Shopping Behaviors & Preferences

Gen Z prefers a hybrid shopping journey, blending online research with in-store purchases. They are more likely to use mobile payments and seek personalized, ethical, and socially conscious brands.

🧠 Strategic Implications for Brands

Gen Z is the most marketed-to generation in history and expects seamless digital experiences, authenticity, and social responsibility from brands.

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Source: GFK Consumer Life global preview report: *A Fresh Look at Gen Z and Millennials*

Fresh meat had an excellent 2025.

2025 Fresh Meat

$79.5B
+9.1% vs. 2024

16.9B LBS
+3.0% vs. 2024

BEEF **$45B** +12.4% ($) +4.3% (LBS)	**TURKEY** **$3.3B** +3.9% ($) +0.6% (LBS)
CHICKEN **$20.7B** +6.5% ($) +3.2% (LBS)	**LAMB** **$959M** +7.4% ($) -0.6% (LBS)
PORK **$8.7B** +3.3% ($) +1.1% (LBS)	**GAME** **$219M** -1.8% ($) -1.1% (LBS)

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Source: Annual Meat Conference | The Power of Meat 2026©

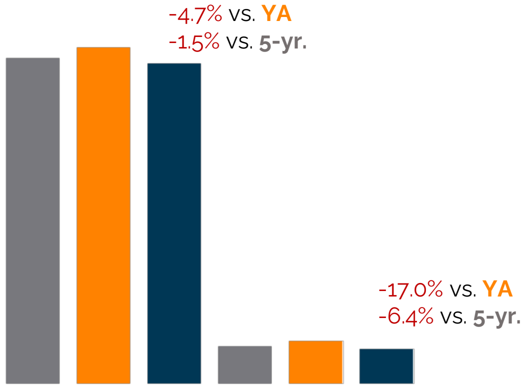
Total U.S.

Dollar and Volume Sales – 4, 13 and 52-Week Time Periods

Compared to the same 13-week time period last year, dollar sales of lamb have decreased 4.7% and volume sales have decreased 17.0%.

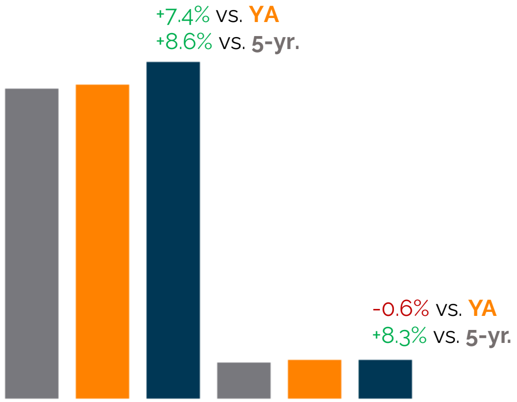
Compared to the same 52-week time period last year, dollar sales of lamb have increased 7.4% and volume sales have decreased 0.6%.

Compared to the same 4-week time period last year, dollar sales of lamb have increased 2.8% and volume sales of lamb have decreased 10.8%.



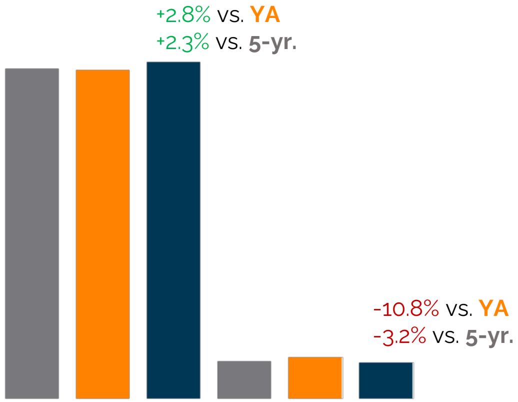
Latest 13 Weeks	Dollar Sales	Volume Sales
Latest 13 Weeks	$230,160,225	25,050,345
YAGO	$241,575,188	30,170,814
5-Year Average	$233,559,464	26,750,995

Latest 13 Weeks



Latest 52 Weeks	Dollar Sales	Volume Sales
Latest 52 Weeks	$959,425,705	110,660,483
YAGO	$893,647,776	111,290,014
5-Year Average	$883,498,385	102,138,094

Latest 52 Weeks



Latest 4 Weeks	Dollar Sales	Volume Sales
Latest 4 Weeks	$90,474,621	9,814,665
YAGO	$88,033,296	11,003,480
5-Year Average	$88,413,330	10,143,420

Latest 4 Weeks

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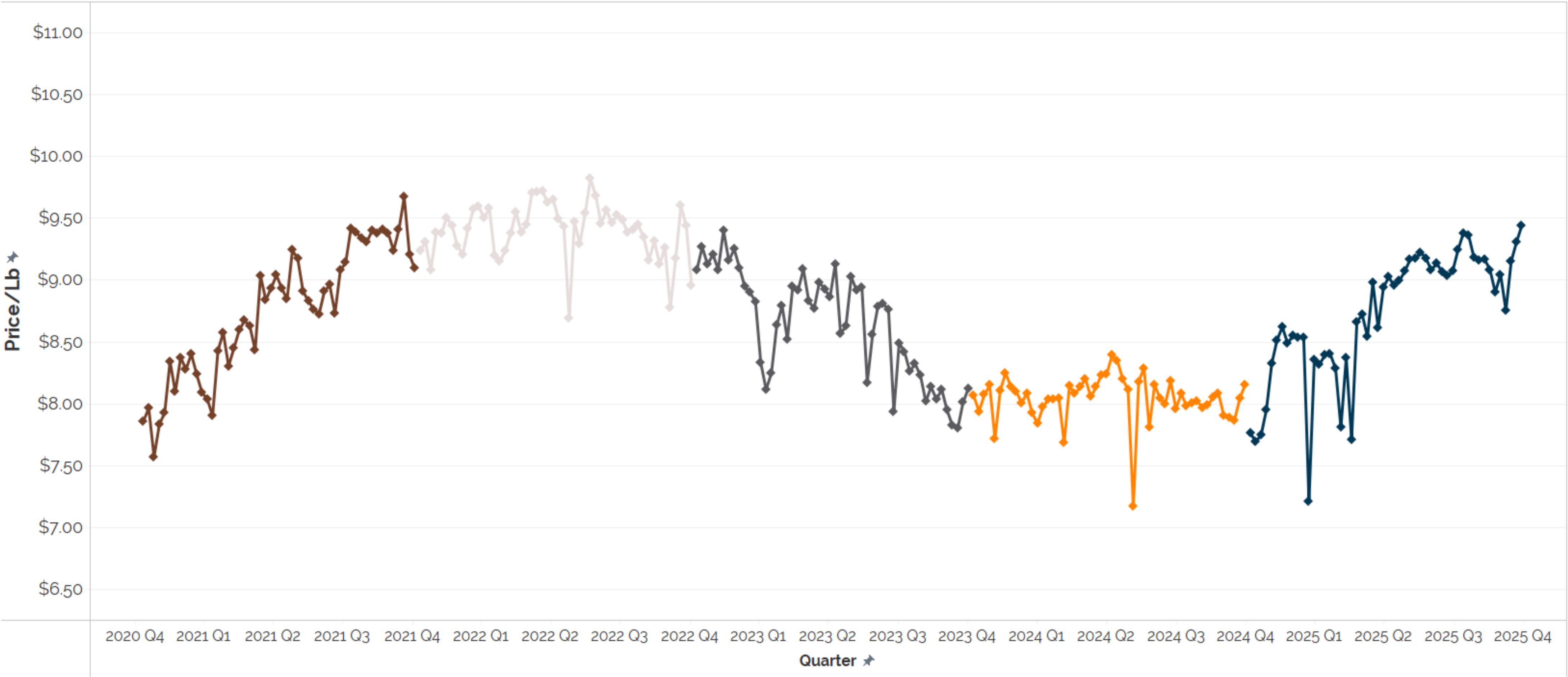
Source: ALB 2025 Lamb Consumer Report

Price of Lamb | American Lamb + Imports

Average Price/Lb. of Lamb by Week and Year



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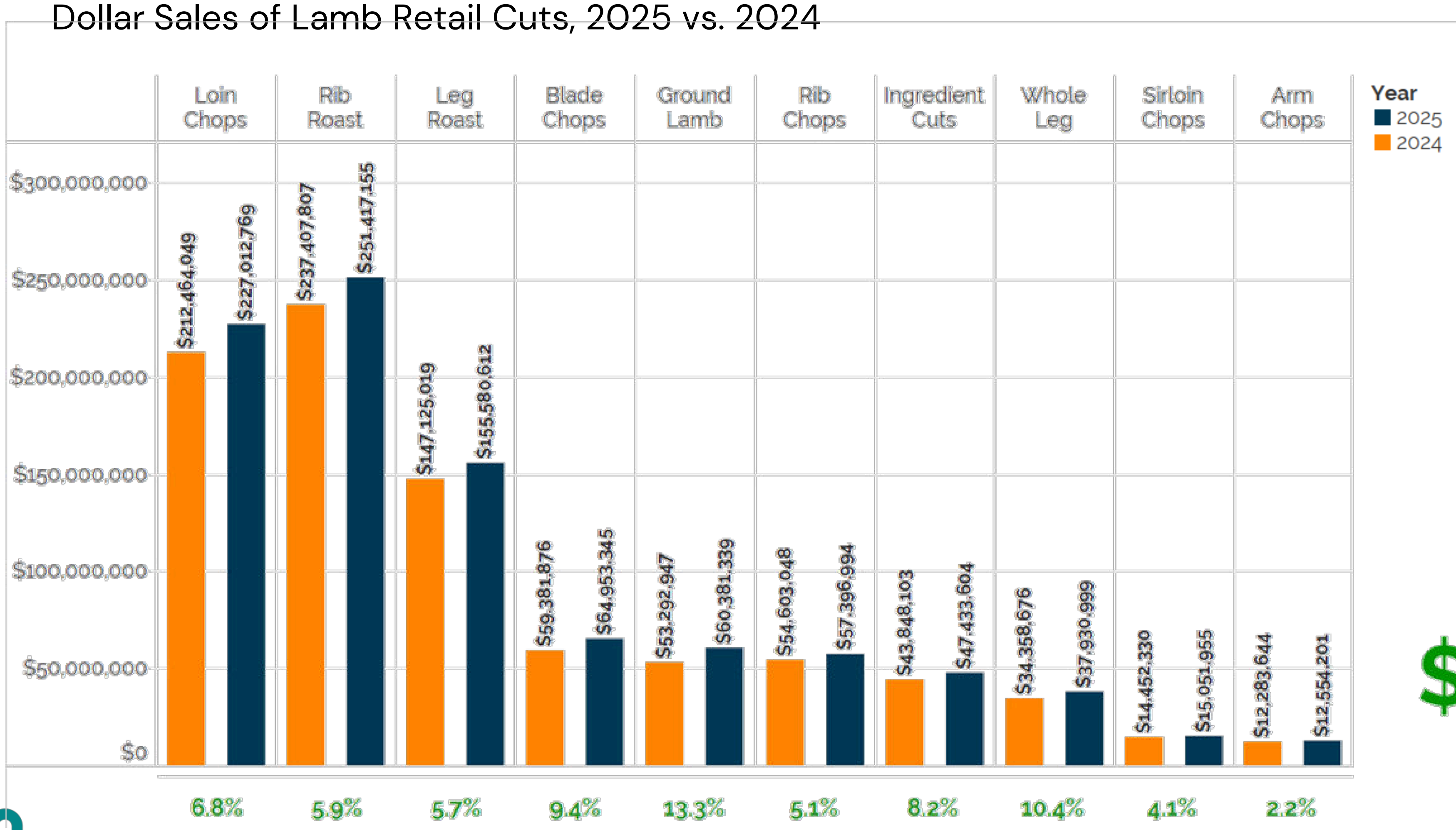
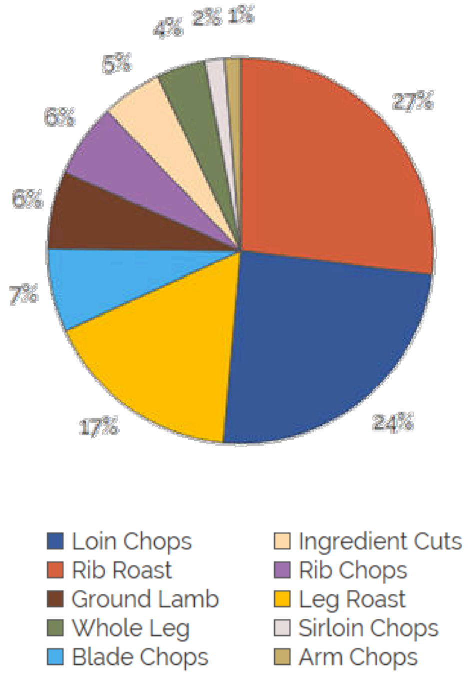
Source: ALB 2025 Lamb Consumer Report

Total U.S. Sales | American Lamb + Imports





$959,425,705
Total Dollar Sales

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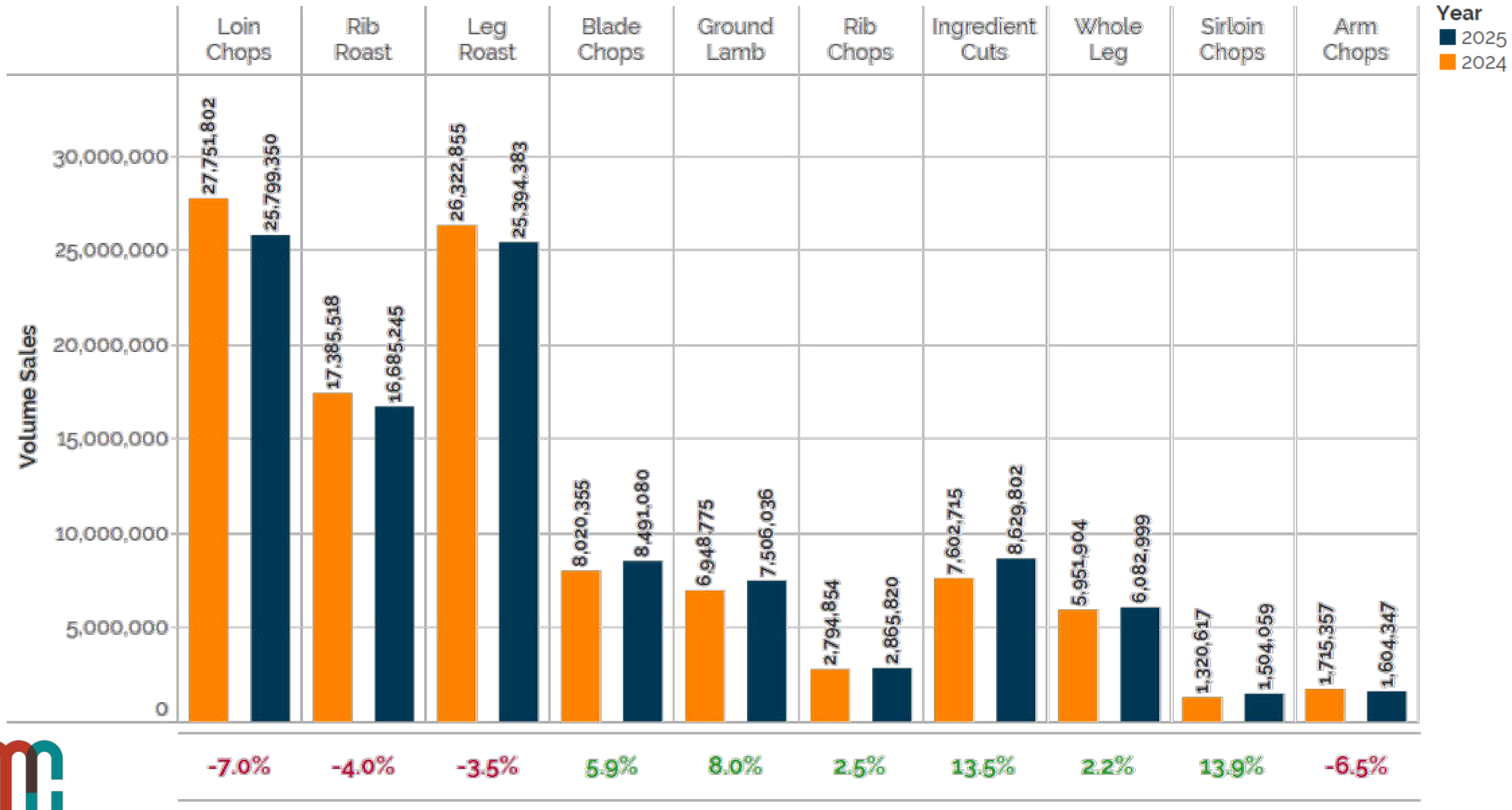
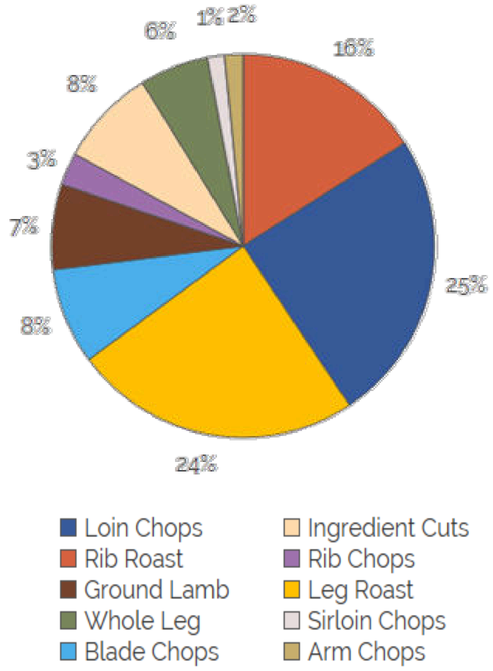
Source: ALB 2025 Lamb Consumer Report

Total U.S. Sales | American Lamb + Imports

Volume Sales of Lamb Retail Cuts, 2025 vs. 2024





110,660,483

Total Pounds Sold

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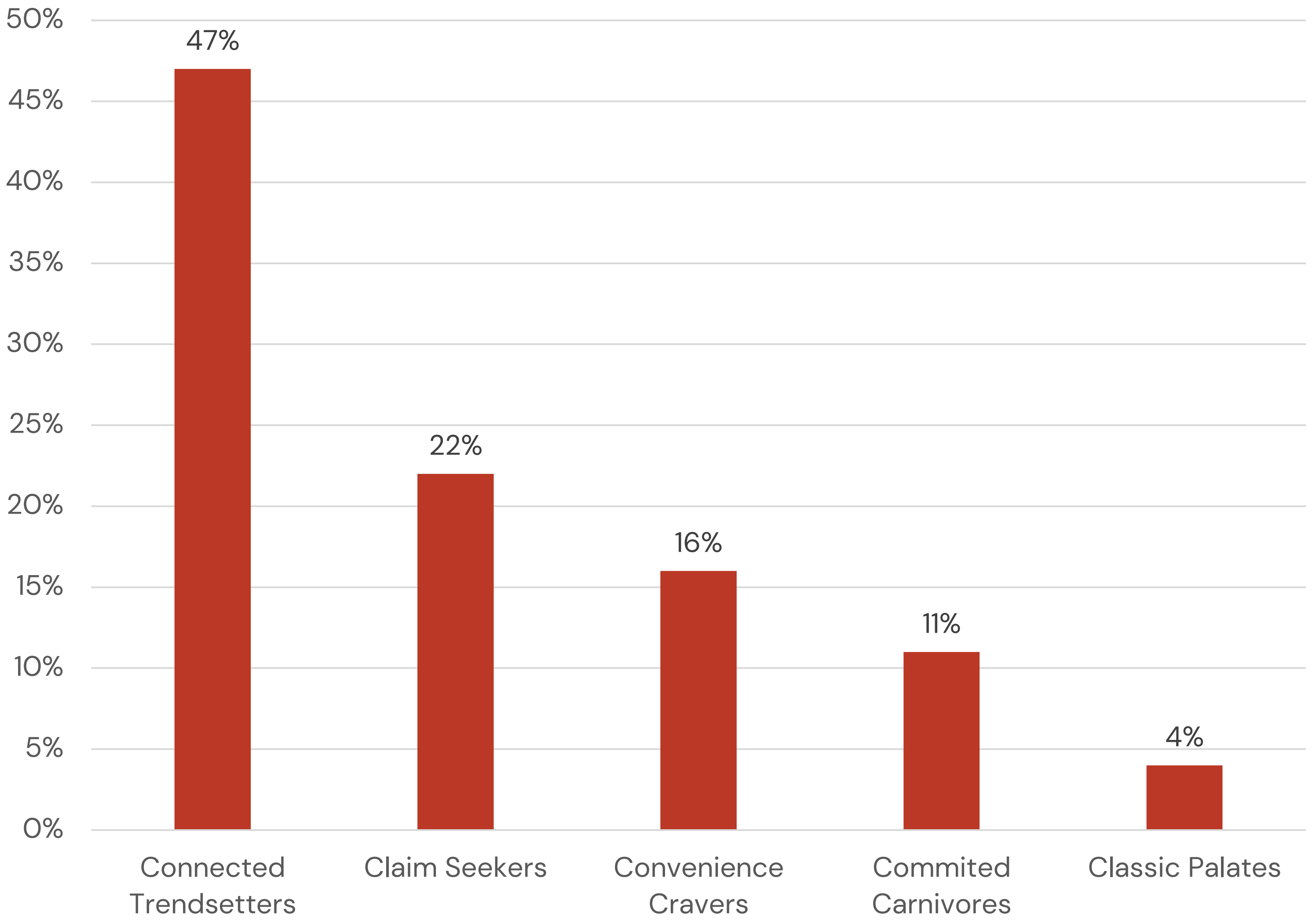
Source: ALB 2025 Lamb Consumer Report

2025 Lamb Consumer Segments

47% of lamb consumer respondents fall into Midan's Connected Trendsetter meat consumer segment followed by 22% into the Claim Seekers segment.



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Source: ALB 2025 Lamb Consumer Report

Midan's Meat Consumer Segmentation 3.0

				
CONNECTED TRENDSETTERS (14%)	**CLAIM SEEKERS (24%)**	**CONVENIENCE CRAVERS (17%)**	**COMMITTED CARNIVORES (23%)**	**CLASSIC PALATES (22%)**
• Love cooking and eating meat and poultry • Like to give and receive recommendations for meat products • Early adopters • Open to experimenting • Very active with social media and online shopping	• Average engagement with meat • High engagement with poultry • Very motivated by natural and environmental claims • Willing to pay more for meat with claims • Open to experimenting	• Not very engaged with meat or poultry • Don't have time for a sit-down meal with meat • Not a confident meat cook • Rely on convenience products for cooking meat • Skew younger and male	• Very engaged with meat – love to cook and eat it • Open to experimenting • Not motivated by health claims • Feel meat is too expensive • Lower income, but willing to try new products and brands with a coupon or discount	• Eat meat regularly but not very emotionally attached • Not that into cooking • Older, but not motivated by health claims • Feel meat is too expensive • Lower income and respond to sale prices
Insight: This segment is already heavily engaged but can be reached online with recommendations.	**Insight:** This segment is a prime target for increasing their consumption by enticing them with production claims.	**Insight:** This segment will need fast and easy solutions to overcome their lack of skills and time.	**Insight:** This segment is willing to try new things but has monetary constraints, so deals may be needed to motivate.	**Insight:** This segment is not into cooking nor highly proactive, so they may be a limited opportunity.

Stronger Opportunity ——— Weaker Opportunity

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2025 Lamb Consumption Highlights

20%

20% of respondents reported their lamb consumption increased

25%

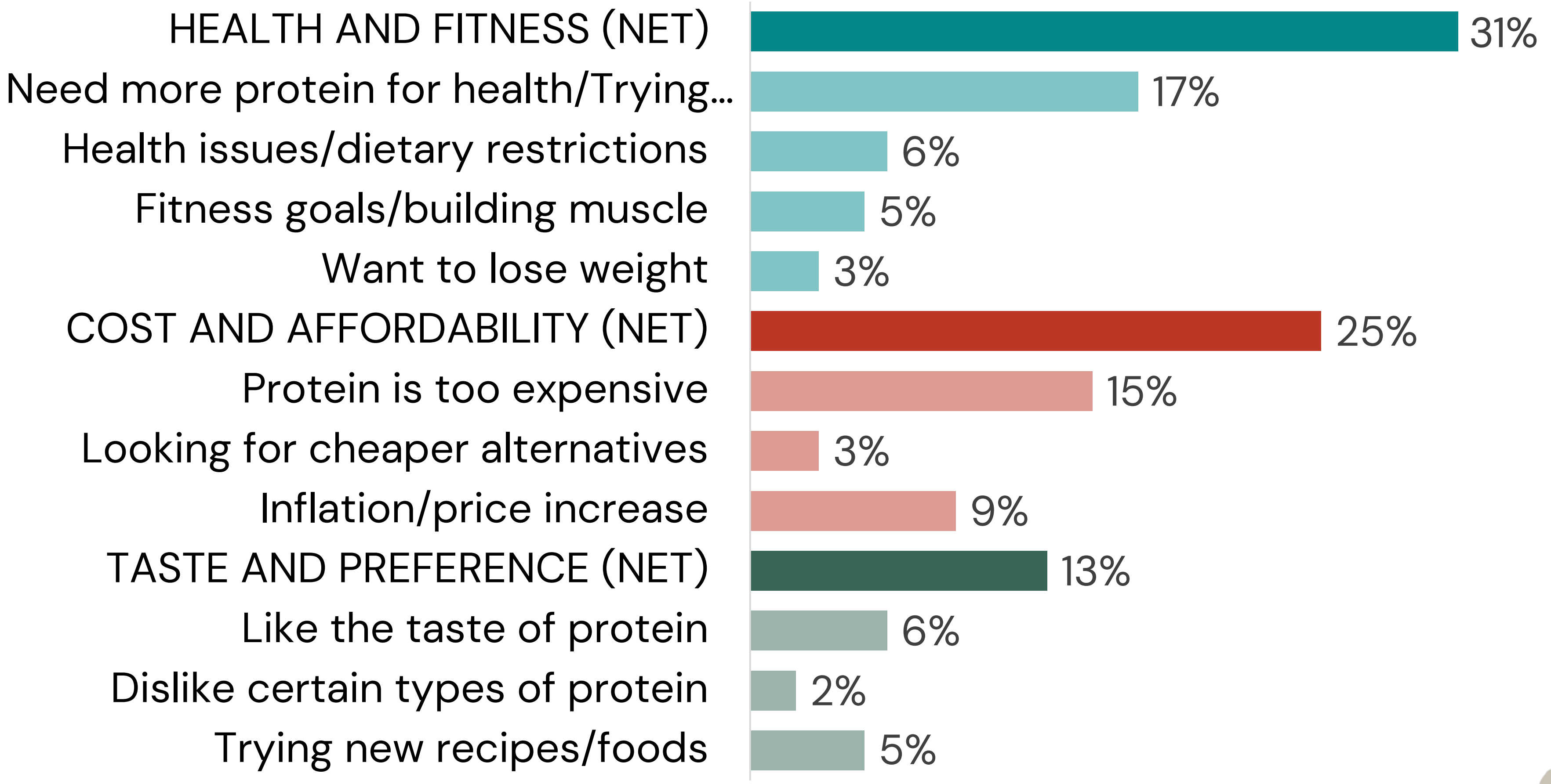
25% of respondents were Heavy Lamb Users

67%

67% of respondents reporting eating lamb as a protein option throughout the year

Source: ALB 2025 Lamb Consumer Report

Why Has Your Protein Consumption Changed in the Past Year?



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Source: ALB 2025 Lamb Consumer Report

2025 Consumer Attitudes: Lamb Owns Taste

77%

77% of respondents strongly agreed or agreed with the statements 'cannot imagine giving up the taste of meat' and 'meat is healthy.'

64%

'Taste and flavor' was reported by 64% of respondents as the reason they like lamb

Source: ALB 2025 Lamb Consumer Report

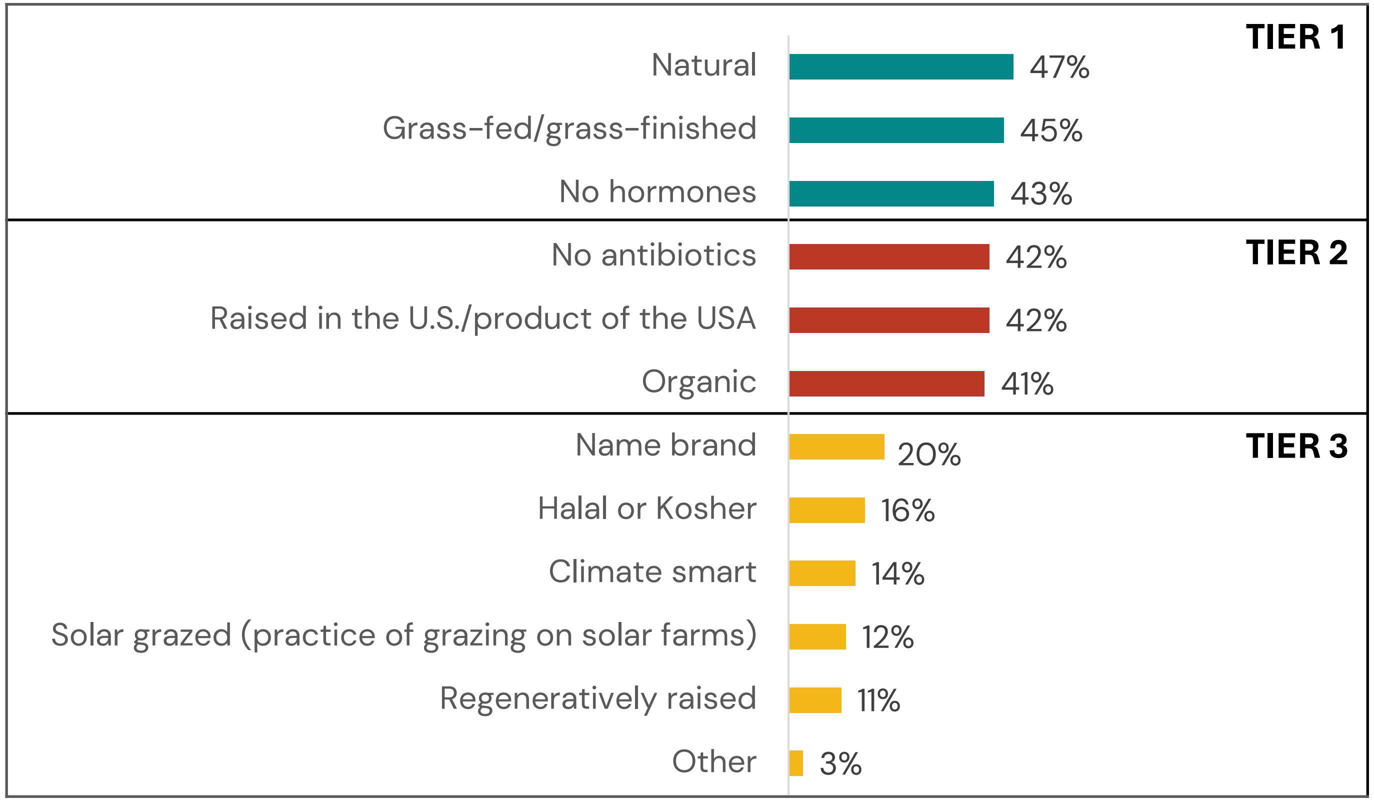
Willingness to Pay for Label Claims

47% of respondents reported they would pay more for meat/lamb labeled ‘natural,’ 45% ‘grass-fed/grass-finished’ and 43% ‘no hormones.’

Tier 1 = above 80th percentile

Tier 2 = list average

Tier 3 = below list average



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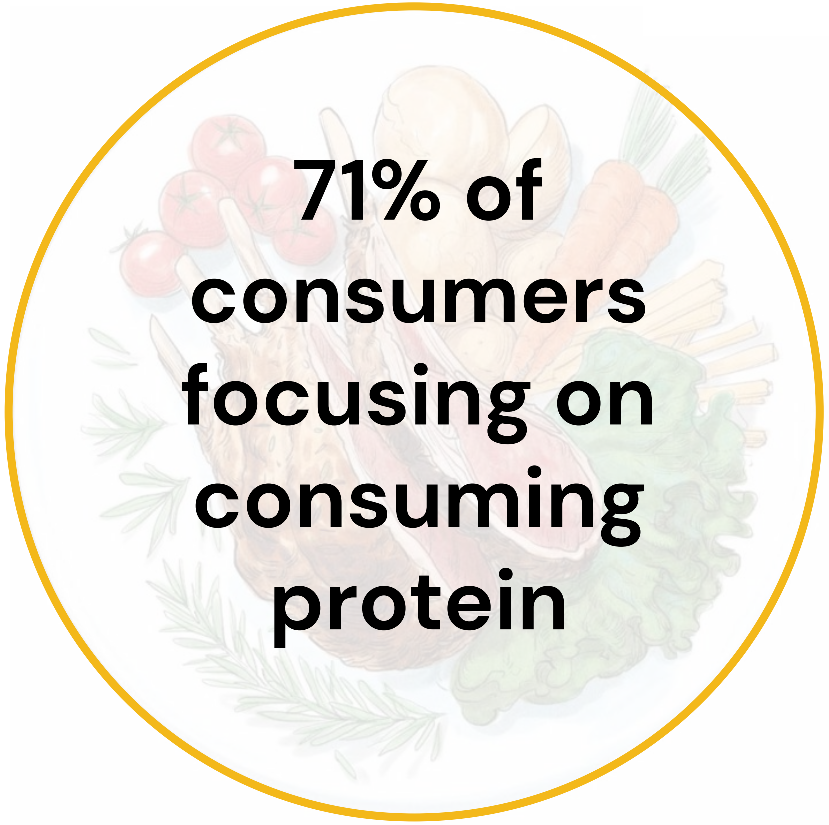
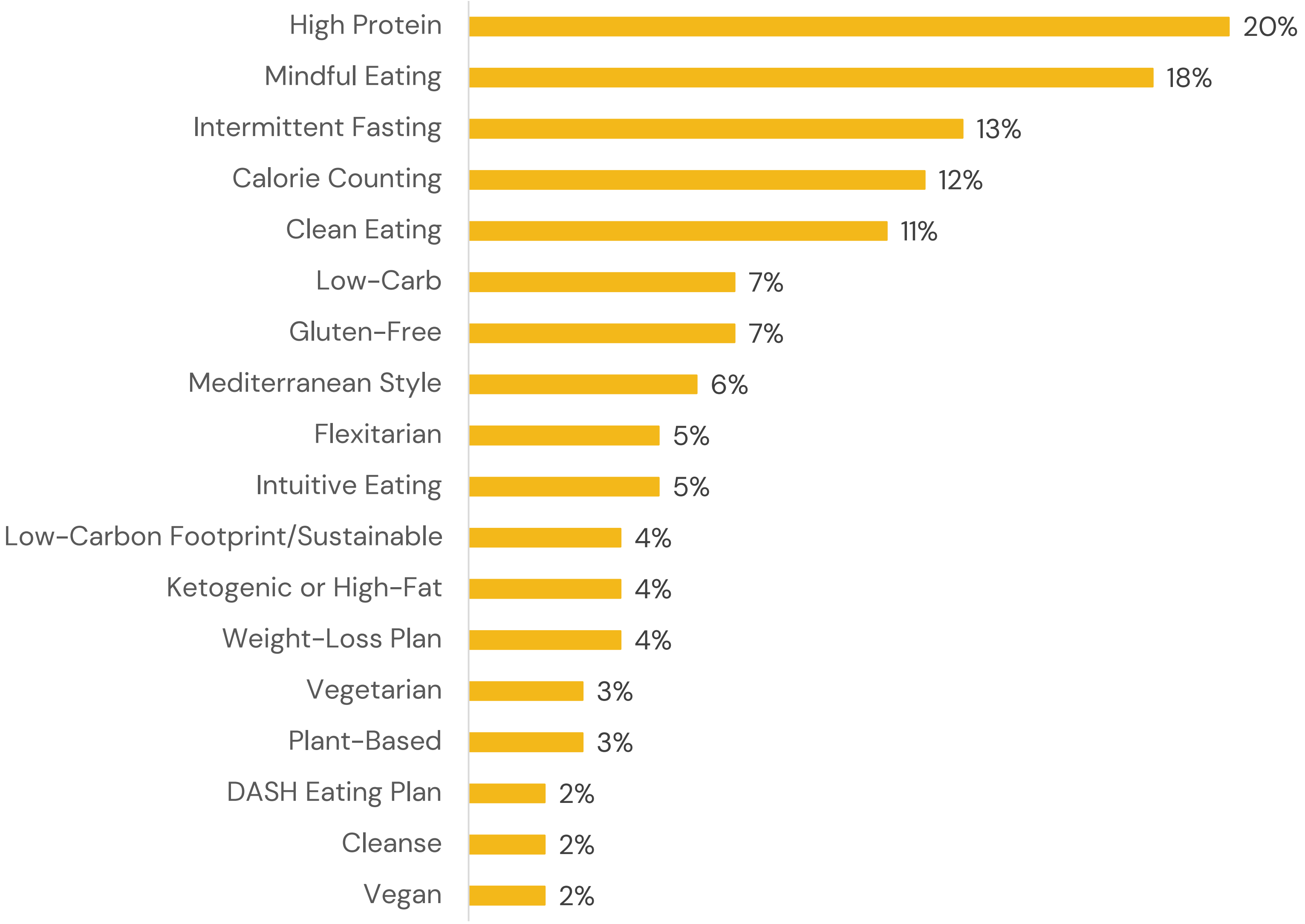
Source: ALB 2025 Lamb Consumer Report

High Consumer Interest in Protein



71% of consumers focusing on consuming protein



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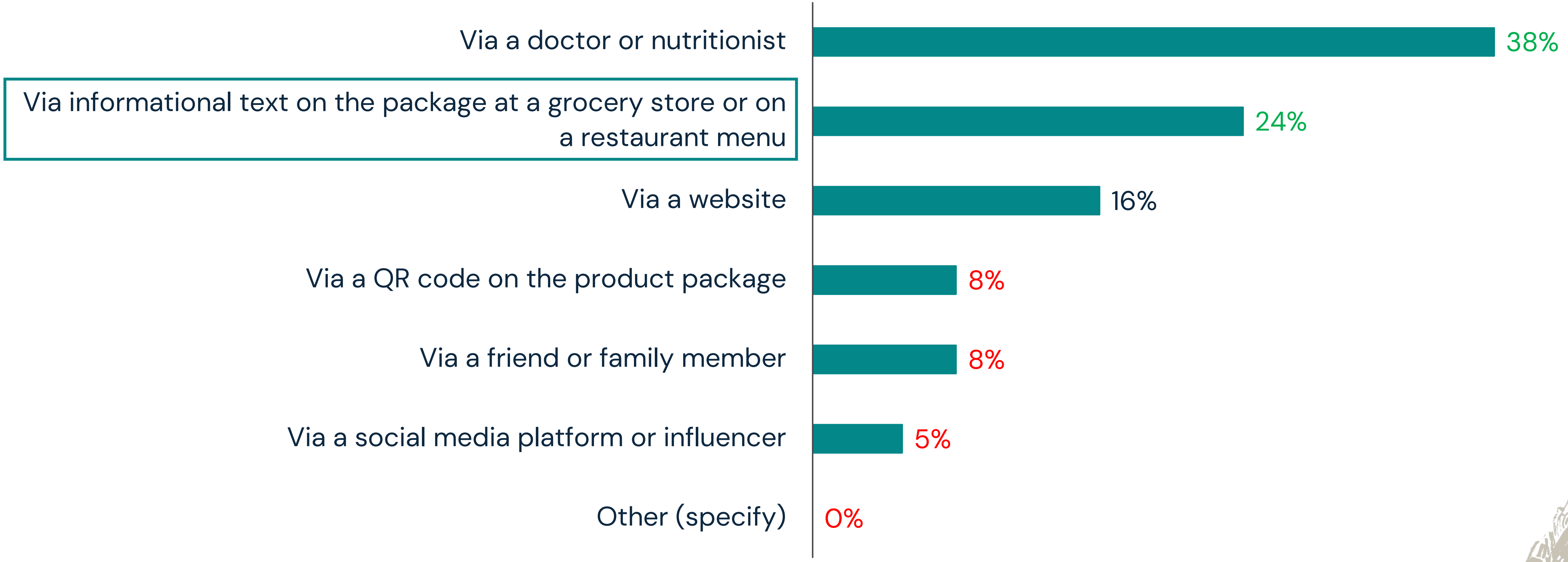
Source: AMC | Emerging Issues: Nutrition, Sustainability and Labeling

Where Consumers Prefer to Receive Health Messages



Source: Midan Health & Sustainability Messaging Survey

Opportunity: Lamb Eating Dislikes

Nearly half (45%) have no dislikes about eating lamb. ‘Cost and availability’ was reported by 26% of respondents as the reason they dislike eating lamb followed by ‘taste and flavor’ and ‘texture and tenderness’ at 10% each, ‘preparation and cooking’ at 7% and ‘animal welfare and ethics’ at 2%.

COST AND AVAILABILITY (26%)
Lamb is considered expensive or hard to find, limiting purchase frequency.

TEXTURE AND TENDNERNESS (10%)
Issues with fat, chewiness, gristle or overall unpleasant mouthfeel.

TASTE AND FLAVOR (10%)
Concerns about the taste being too strong, gamey or needing careful seasoning.

PREPARATION AND COOKING (7%)
Challenges with cooking lamb properly, including long prep time or complexity.

ANIMAL WELFARE AND ETHICS (2%)
Discomfort with eating young animals or ethical concerns.

OTHER (5%)
Miscellaneous dislikes like smell, portion size or dietary constraints.

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Source: ALB 2025 Lamb Consumer Report

Great Work: Lamb Eating Likes

‘Taste and flavor’ was reported by 64% of respondents as the reason they like lamb followed by ‘texture and tenderness’ at 18%, ‘health and nutrition’ and ‘preparation and versatility’ at 11% each, and ‘culture and tradition’ at 5%.

TASTE AND FLAVOR (64%)
Mentions of taste, flavor or seasoning as the main appeal.

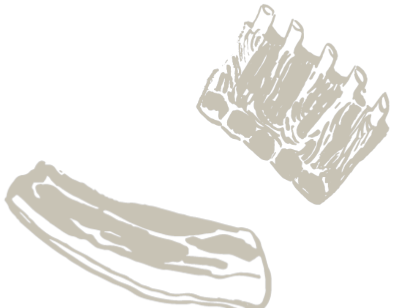
TEXTURE AND TENDERNESS (18%)
Focus on how soft, juicy or tender the meat is.

HEALTH AND NUTRITION (11%)
Highlights protein content, leanness or other health benefits.

PREPARATION AND VERSATILITY (11%)
Mentions of how easy it is to cook or how flexible it is in recipes.

CULTURE AND TRADITION (5%)
References to family meals, cultural identity or holiday traditions.

OTHER (5%)
Seen as different from other proteins or something special.



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Source: ALB 2025 Lamb Consumer Report

Thank You.

midan

A Trozzolo Company