

Lamb on US Menus

Research conducted by
Menu Matters 2025
On behalf of MLA





Methodology

- Analysis combines Menu Matters proprietary trend intelligence with Menu Data menu database that captures approximately 3,000 US restaurants and around 10 million menu items
- 2021 benchmarks reference Datassential. Numbers reflect menu callouts/mentions only – not shipments or sales through the value chain.
- All measures are penetration/incidence on menus (e.g., % of restaurants menuing at least one item featuring [protein]), unless otherwise noted.
- Use insights directionally to shape operator conversations and menu development; not to infer volume.



US Foodservice Context

↘ **Pressures:** Staffing, availability/consistency, input costs, menu streamlining, slower innovation

↗ **Tailwinds:** Multi channel offerings, menu optimisation, format/footprint innovation in some segments

In a tighter operating environment, **lamb** benefits from its **premium credentials** while increasingly appearing in **accessible formats** that support broader consumer adoption.

2026 Menu Matters Consumer Need States

These consumer needs states explain what US diners are looking for from food experiences in 2026 and provide context for how proteins can be positioned on menu

1. Real Food, Real Stories

Consumers want food that feels authentic, human-made, and grounded in real ingredients, not overly processed or ambiguous.

2. Simplify My Life

Consumers are overwhelmed by information overload (74GB/day). They want clarity, transparency, and reduced complexity in choices.

3. Make My Experiences Meaningful

People increasingly value connection, care and human touch in food experiences – what makes dining feel personal and memorable?

4. Help me Trust Again

Consumers crave credibility and reassurance from brands – accurate info, honest value and real benefits behind claims.

5. Reduce the Noise

Consumers want brands that cut through digital clutter and offer calm, confidence and focus in an overwhelming environment.



What does this mean for lamb?

- Lamb aligns with demand for authentic and globally inspired food experiences
- Mediterranean and Middle Eastern cuisines support lamb relevance and growth
- Lamb fits well into premium dining and shared meal occasions
- Provenance and quality stories can strengthen trust and differentiation
- Familiar formats such as gyros and sandwiches can encourage trial



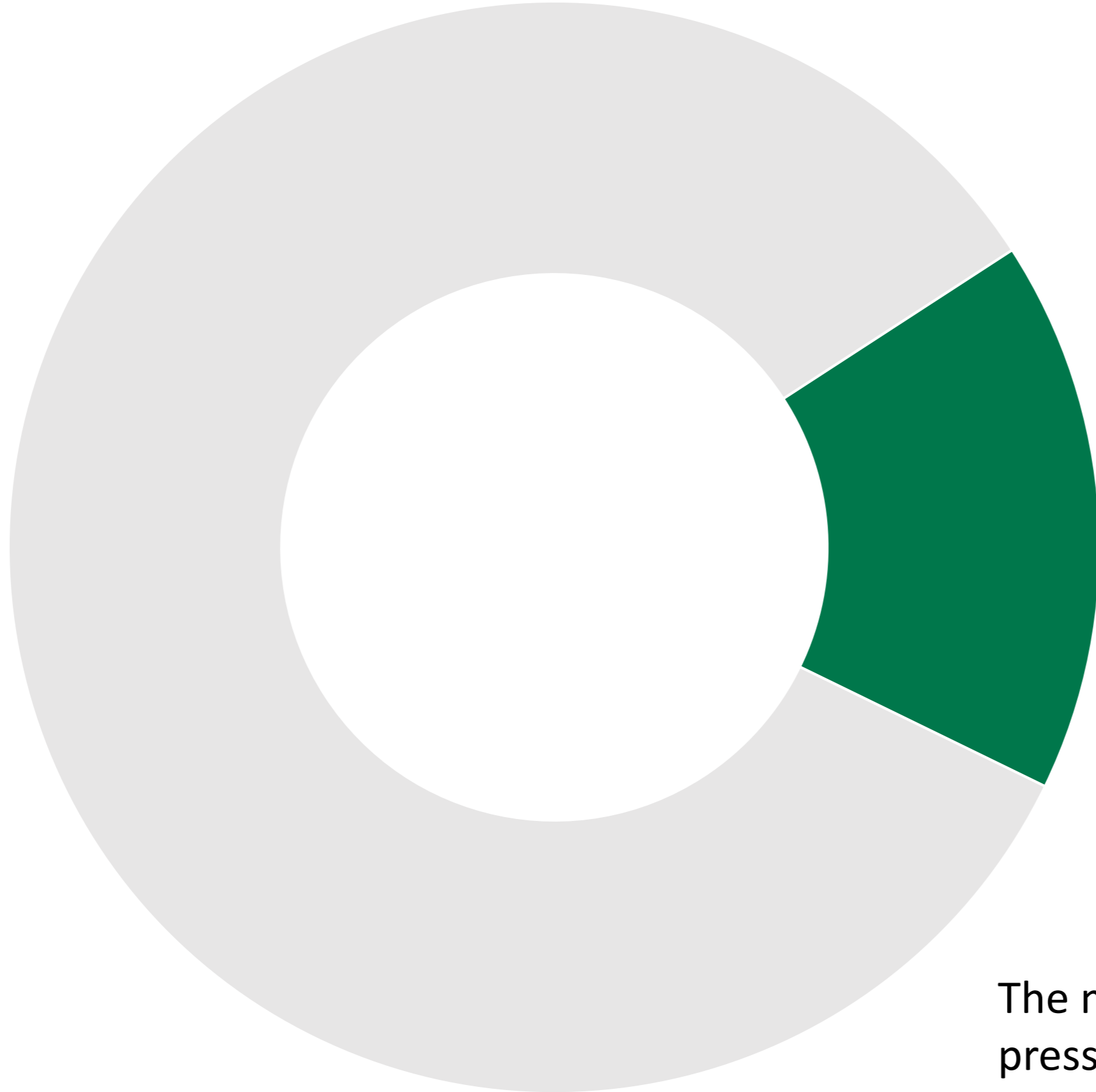
Executive Summary + Key Insights

- **Lamb** remains relatively resilient in US foodservice, with menu penetration at 19% despite broader menu streamlining and industry pressures
- A **shift toward casual dining** and **growing** presence in **small/regional chains** suggests lamb is becoming **more accessible** to a broader consumer base
- **Mediterranean, Middle Eastern** and **Indian** cuisines continue to be key **drivers of lamb menuing** and consumer exposure
- **Familiar formats** such as sandwiches and gyros **support consumer trial** and help **broaden adoption** beyond traditional centre-of-plate occasions
- Country of origin identification remains low, creating **opportunities** to **increase awareness** of Australian lamb through **provenance, quality** and **sustainability storytelling**.

➔ **Opportunity:** Grow adoption through familiar formats while leveraging provenance, quality and sustainability storytelling

Lamb penetration has remained relatively resilient despite foodservice pressures

Share of Restaurants Currently Menuing Lamb (2025)



19%

of operators currently feature lamb on the menu



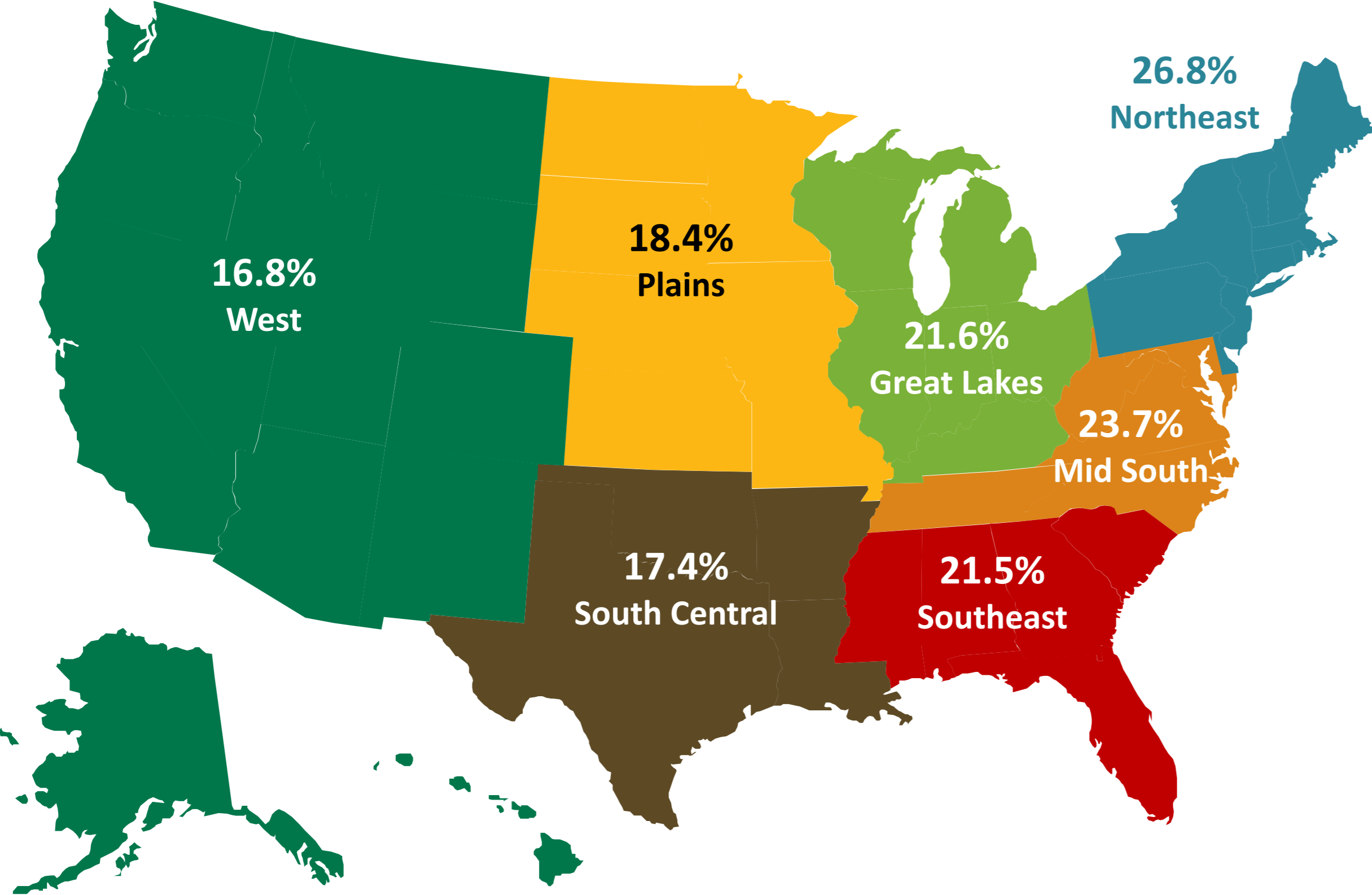
Down **-5%** from **20%** reported in 2021

The modest decline reflects broader foodservice pressures rather than a major shift away from lamb

Source: Menu Matters MLA 2025 Menuing Report, 2021 data from Datassential
NOTE: Penetration represents the percent of all restaurants currently menuing at least one item featuring lamb.

Lamb menuing is strongest in the Northeast and South but is present across all US regions

Share of Restaurants in each Region Currently Menuing Lamb (2025)



2021 Data

West	13.3%
Midwest	13.8%
South	14.6%
Northeast	17.4%

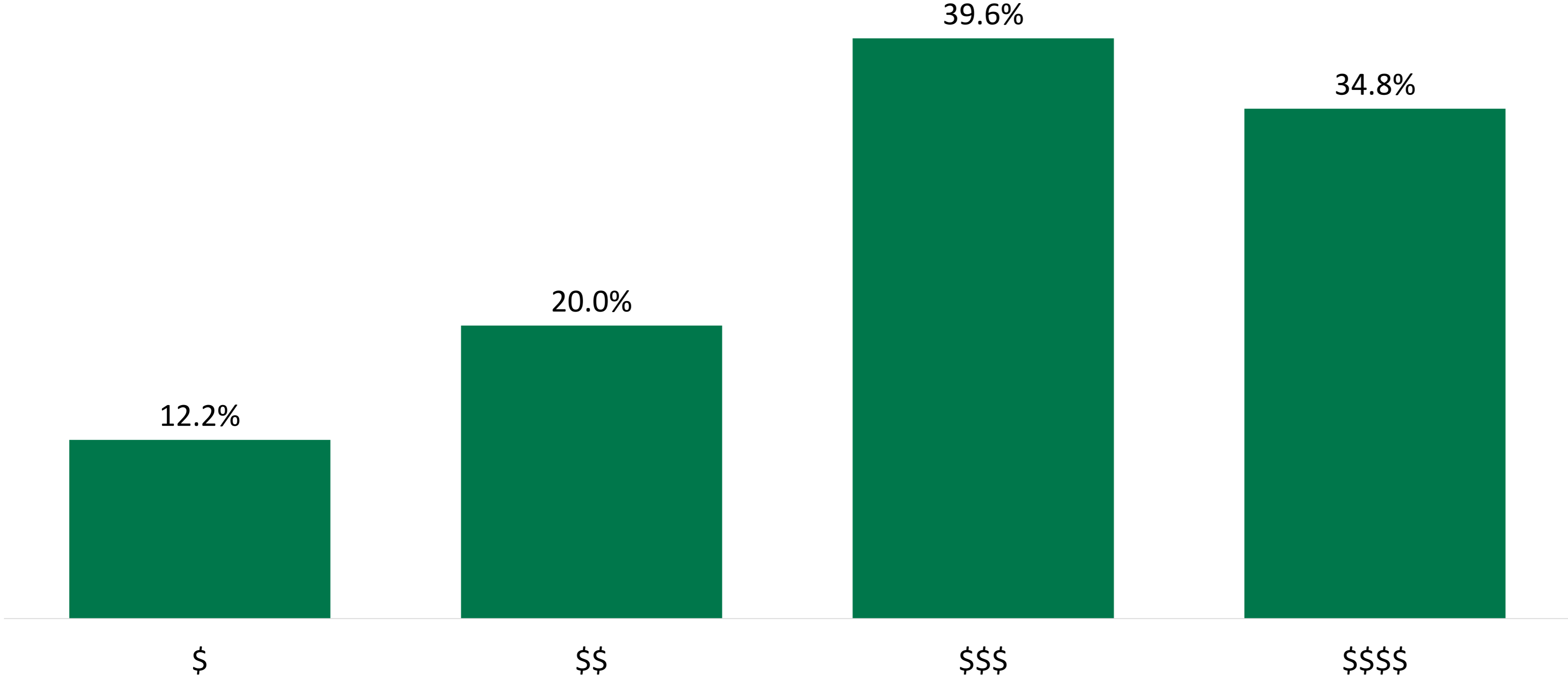
Growing Mediterranean and Middle Eastern flavour trends may support lamb to expand beyond its traditional consumer bases



Source: Menu Matters MLA 2025 Menuing Report, 2021 data from Datassential
 NOTE: Penetration represents the percent of all restaurants currently menuing at least one item featuring lamb

Lamb remains strongest in full-service restaurants with casual dining supporting broader accessibility

Share of Restaurants by Price Point Currently Menuing Lamb (2025)



2021 Data

Quick Service	6.6%
Fast Casual	5.2%
Midscale	16.2%
Casual Dining	20.6%
Fine Dining	47.1%

Source: Menu Matters MLA 2025 Menuing Report

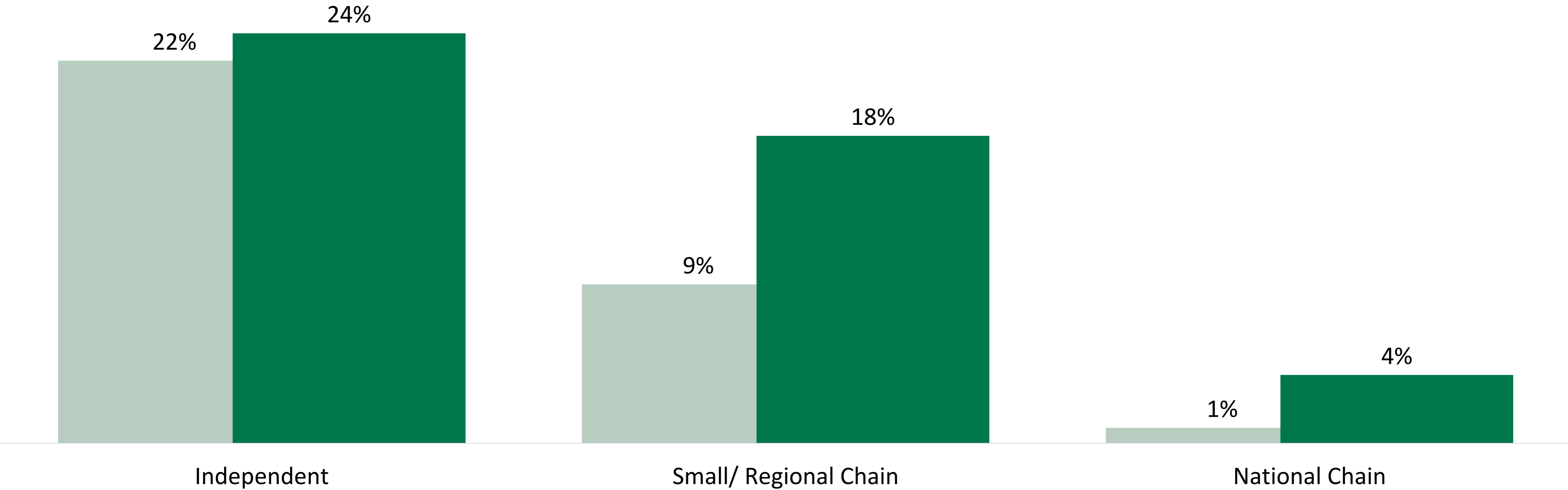
NOTE: Penetration represents the percent of all restaurants currently menuing at least one item featuring lamb

 See restaurant definitions in the **Appendix**

Growth in small/regional chains increases consumer exposure particularly among younger and more mainstream consumers

Share of Restaurants by Type Menuing Lamb (2025 vs 2021)

■ 2021 ■ 2025

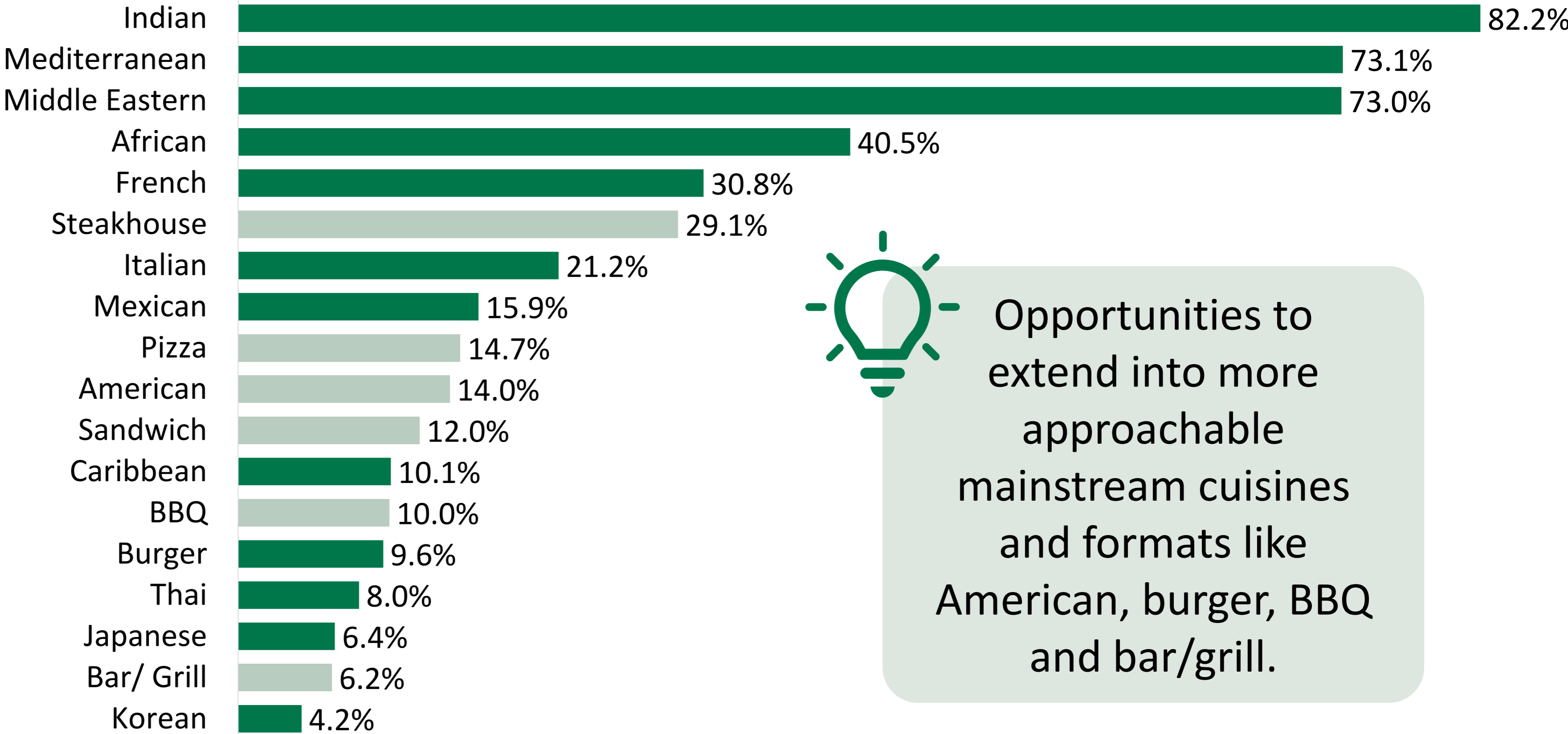


Source: Menu Matters MLA 2025 Menuing Report, 2021 data from Datassential
NOTE: Penetration represents the percent of all restaurants currently menuing at least one item featuring lamb

 See restaurant definitions in the **Appendix**

Lamb is strongest in Indian, Mediterranean and Middle Eastern cuisines

Share of Restaurants by Menu Focus Currently Menuing Lamb (2025)



Opportunities to extend into more approachable mainstream cuisines and formats like American, burger, BBQ and bar/grill.

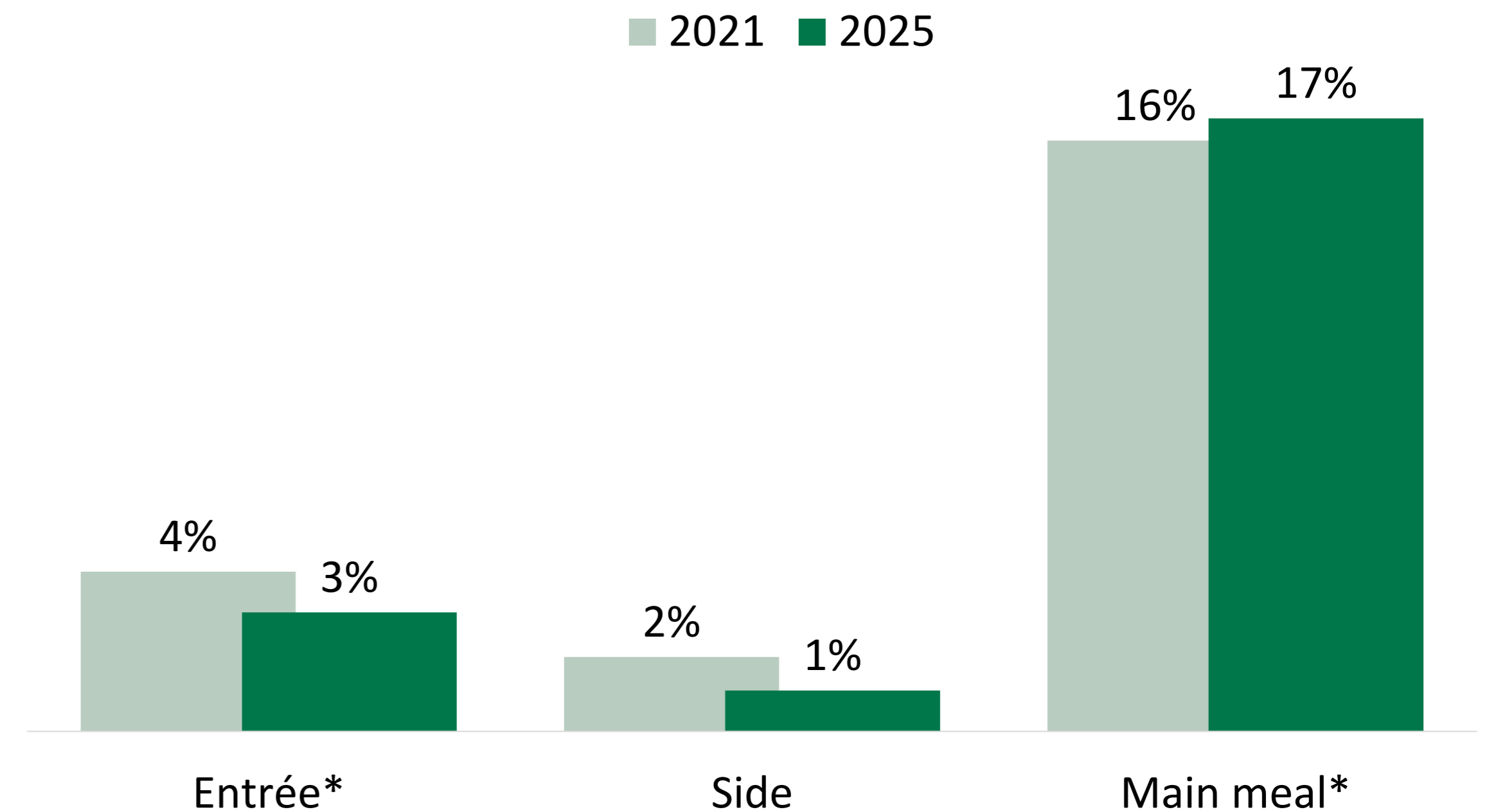
Source: Menu Matters MLA 2025 Menuing Report

NOTE: Penetration represents the percent of all restaurants currently menuing at least one item featuring lamb



Lamb remains primarily a main meal protein

Share of Restaurants Currently Menuing Lamb by Menu Part (2025 vs 2021)



Smaller portions and shareable formats can encourage trial while maintaining lamb's premium positioning.

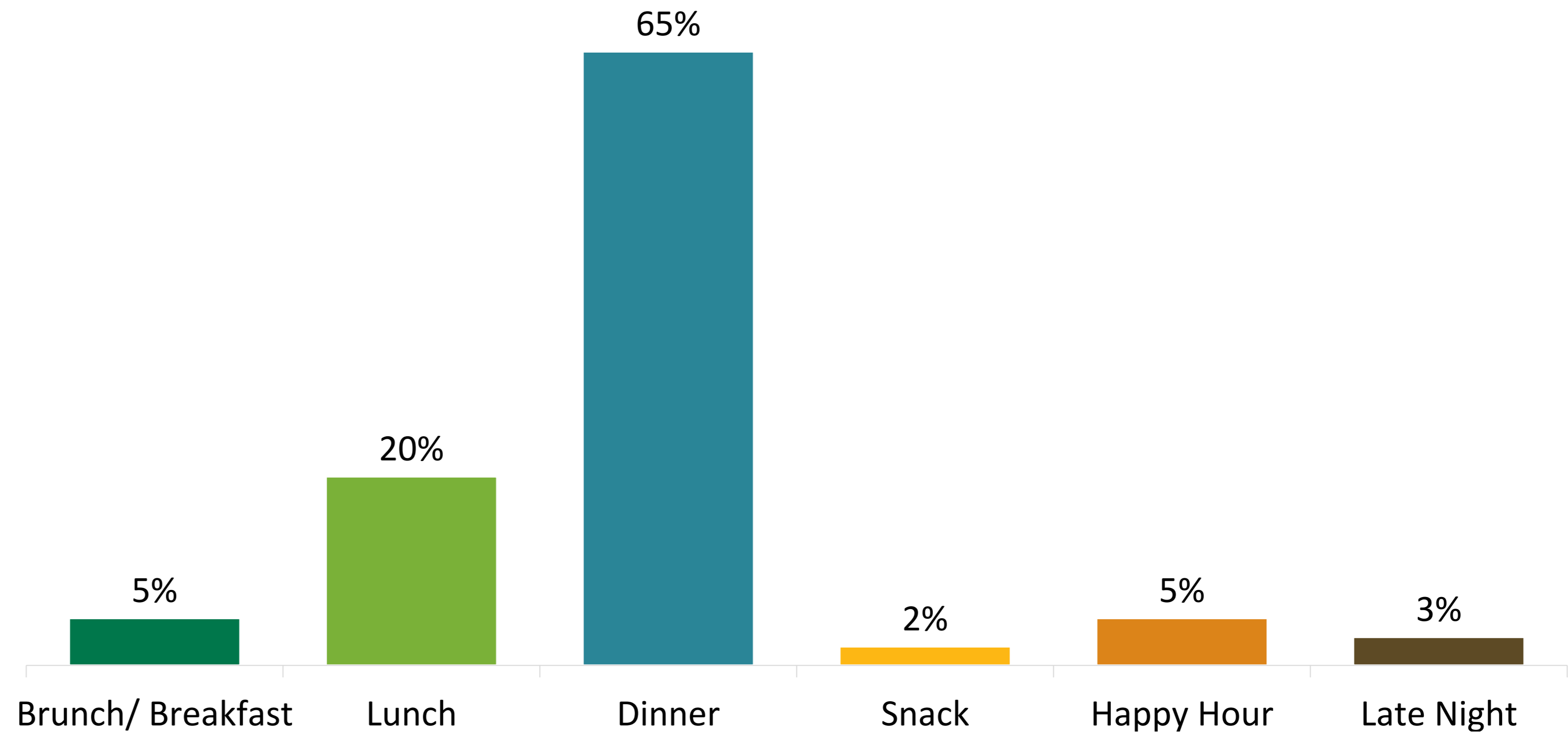
Source: Menu Matters MLA 2025 Menuing Report, NOTE: Penetration represents the percent of all restaurants currently menuing at least one item featuring lamb, *Entrée= Appetizer/Main meal=main entrée in original survey design



See menu terminology definitions in the **Appendix**

Lamb is predominantly a dinner protein, with lunch also playing a meaningful role

Distribution of Items Featuring Lamb by Daypart (2025)



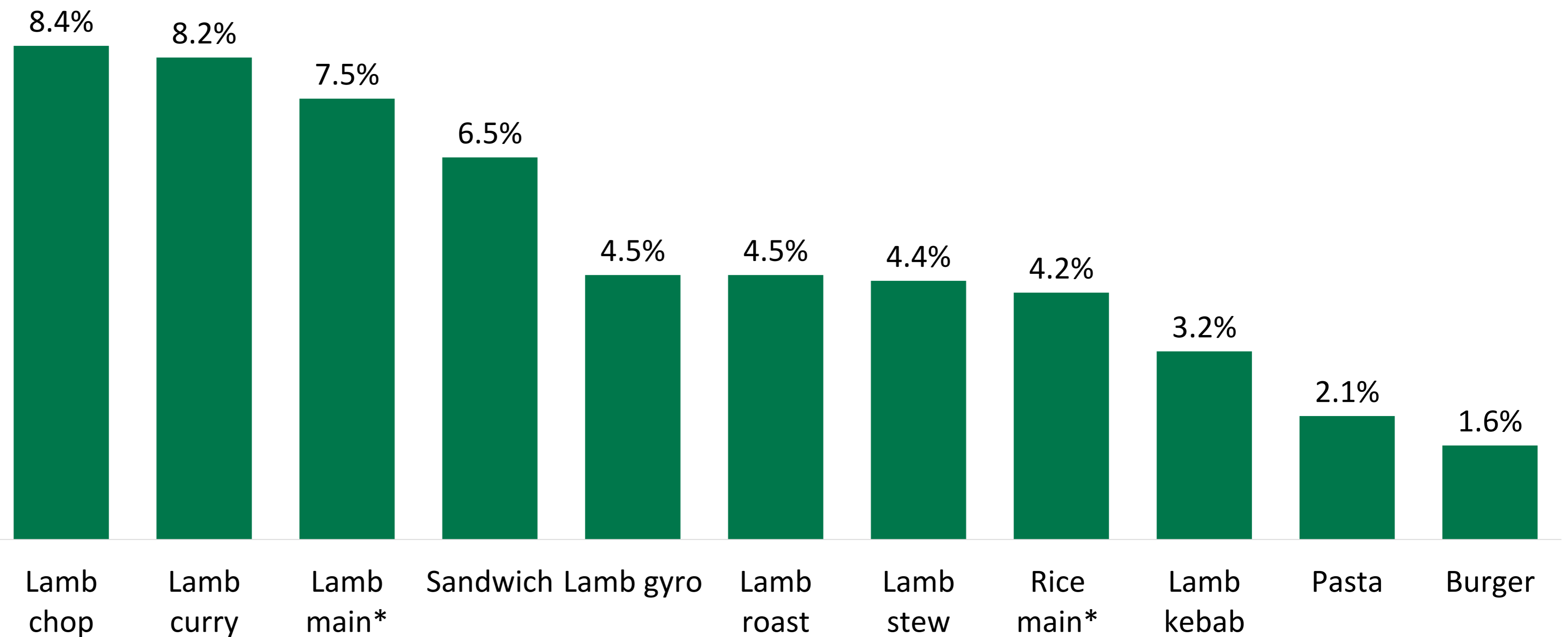
Lunch and shareable occasions provide opportunities to increase frequency and broaden consumer exposure

Source: Menu Matters MLA 2025 Menuing Report

NOTE: Penetration represents the percent of all restaurants currently menuing at least one item featuring lamb

Traditional lamb applications dominate, while sandwiches and gyros support mainstream adoption

Incidence of Lamb by Item Type (2025)



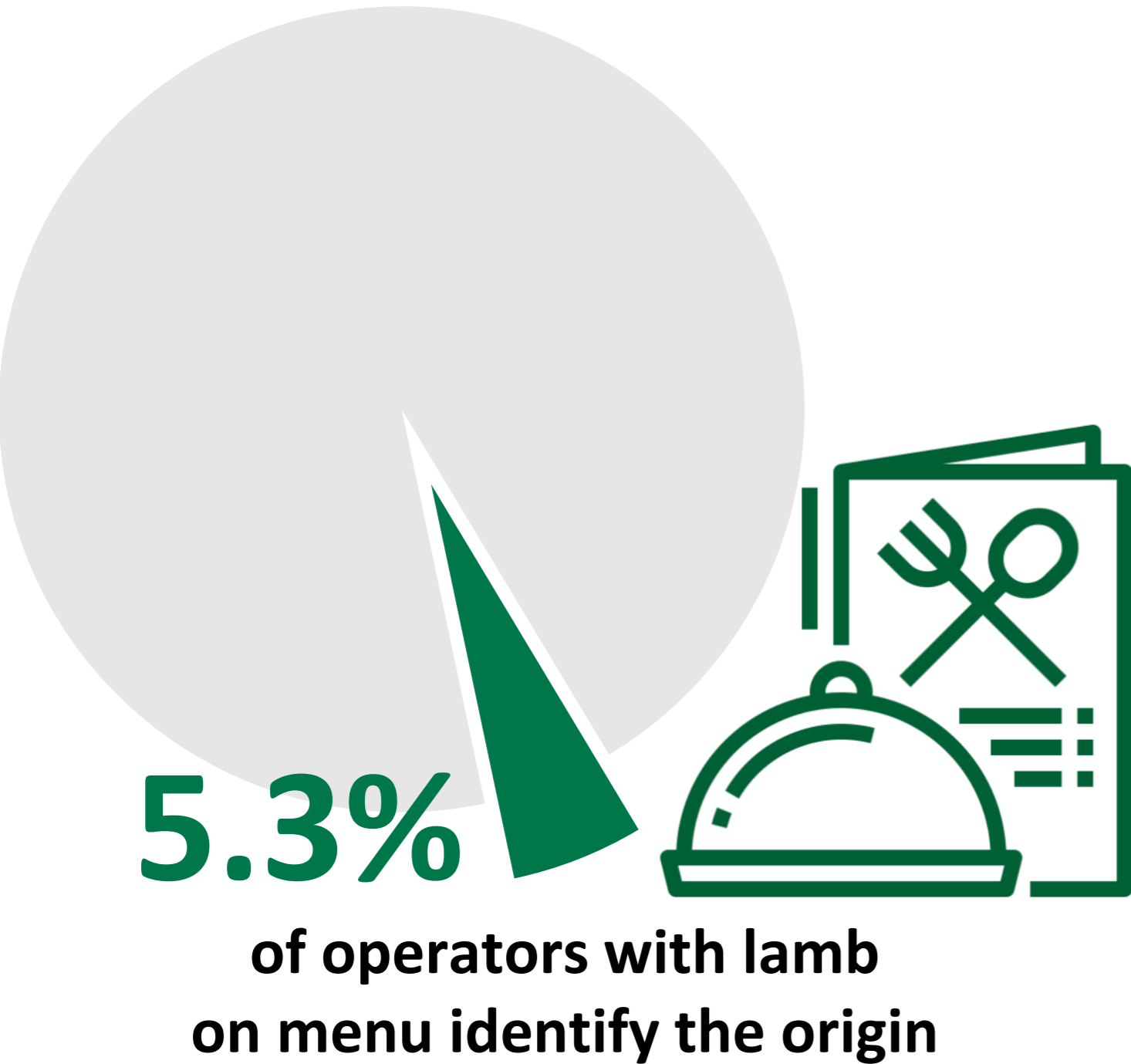
Familiar and approachable formats such as sandwiches, gyros and burgers (e.g. Turkish Lamb Pita, pictured left) can **accelerate consumer trial** and **broader adoption**.



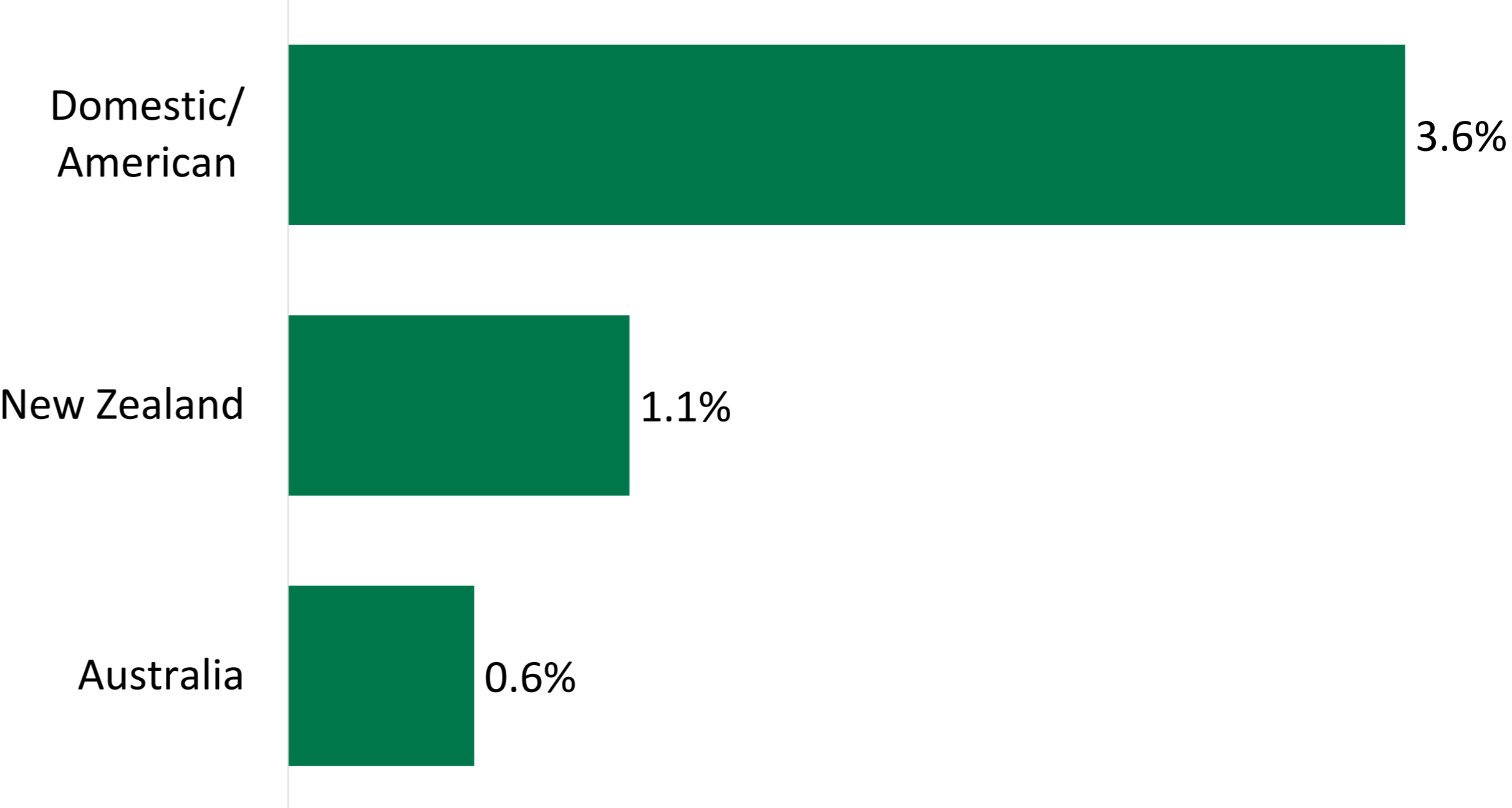
See menu terminology definitions in the **Appendix**

Source: Menu Matters MLA 2025 Menuing Report, NOTE: Penetration represents the percent of all restaurants currently menuing at least one item featuring lamb, *Main=entrée usage in original survey design

Only 5.3% of operators menuing lamb identify any origin but New Zealand is cited more often than Australia



Penetration of Source of Origin Identification Among Operators Menuing Lamb (2025)



➔ **Opportunity:** Build awareness of Australian lamb through provenance, quality and sustainability messaging where origin identification is appropriate

Source: 2025 data from Menu Data; 2021 data from Datassential, NOTE: Penetration here is across all operators currently menuing at least one item with lamb. For example, 5.3% of operators with lamb on the menu identify it as “domestic” or “American”

Appendix



Meal Part and Restaurant Type Definitions

Meal Part Definitions

- **Appetizers:** Small or shareable plates offered before the entrée, may also be called small plates, starters, hors d'oeuvres or entrées in Australia
- **Entrees:** The main meal portion, main course or large plate option on a menu, often featuring a center-of-plate protein but may also feature handhelds, burgers, sandwiches, large salads, etc. It is the 'main' in Australia

Restaurant Type Definitions

- **Independents:** Operations with only 1 to 3 units, most often in a small geographic footprint
- **Small/regional chains:** Operators with 4 to 50 units that may stretch across one or two contiguous regions
- **National chain:** Over 50 units with chains distributed across the country, though not necessarily present in every state or region



Restaurant Segment Definitions

- **Quick service (\$):** traditional fast-food restaurants, typically offering food at the lowest price point across segments with an emphasis on counter, takeout, drive thru and delivery
- **Fast casual (\$\$):** operators that are at a slightly higher price point than quick service, often emphasize health and/ or premium quality, with a greater emphasis on on-site dining in addition to counter and delivery
- **Midscale (\$\$\$):** Table-service restaurants often with an emphasis on breakfast and no alcohol though many global cuisine operators without alcohol will also fall into this segment
- **Casual dining (\$\$\$\$):** Table-service restaurants often with an emphasis on bars and alcohol programs, typically do not offer breakfast
- **Fine dining (\$\$\$\$\$):** White tablecloth, table-service restaurants with an emphasis on dinner programs and least likely to offer delivery or to-go programs

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