



midan

The image features a 3D logo for 'midan' set against a dark blue, curved background. The word 'midan' is rendered in a white, sans-serif font with a slight shadow, giving it a three-dimensional appearance. Above the letter 'i' is a stylized crown icon, also in white, with three points. The background has a subtle gradient and a curved line that suggests a globe or a stylized horizon.



# Consumer Insights & U.S. Lamb Sales

# American Lamb Board & Midan's Partnership

The American Lamb Board partners with Midan Marketing to:

- Conduct Consumer Research/Surveys
  - Understand who is purchasing lamb and their usage and attitudes about all things lamb
  - Determine more targeted marketing tactics that will resonate with lamb consumers
- Analyze retail sales – consumer purchases of lamb
  - Track sales trends
    - Analyze dollar sales, volume sales, cut sales, average prices
    - Monitor target markets and regional sales



WHO IS MIDAN?





A dark, moody photograph of a person's hands seasoning a steak on a grill. The person is using a salt shaker to sprinkle salt onto the meat. The background is dark, and the lighting is focused on the hands and the steak. The overall tone is professional and emphasizes the quality of the meat.

WE ARE CHAMPIONS  
FOR THE VALUE OF MEAT

# U.S. Lamb Sales

# Data Source

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This report and the analyses contained therein were generated using data collected by Circana, purchased by ALB, and thereafter provided to Midan for analysis.

Metrics found in the dataset and explored throughout this report include, but are not limited to: Dollar Sales, Volume Sales (lbs.), Price per Volume (price/lb.), %ACV (Distribution), Dollars per \$MM ACV, Volume per MM ACV, and Category Development Index (CDI).

*Each Circana market is "Multi-Outlet" and includes the following channels: Food/Grocery, Drug, Mass Merchandisers, Walmart, Club Stores (BJ's and Sam's), Dollar Stores (Dollar General, Family Dollar, Fred's Dollar) and Military DECA (commissaries).*





# Methodology

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Sales data in the dataset was aggregated by Circana at the weekly level and covers a period of five full calendar years. The five-year period begins with the week ending January 12, 2020, and ends with the week ending December 29, 2024.

Analysis is conducted at the national, regional and market (i.e., city metropolitan) levels. Per Circana, the U.S. is divided into eight distinct regions: *Great Lakes, Northeast, West, Mid-South, Southeast, South Central, California and the Plains.*

Ten distinct markets have been included for analysis in this report per ALB's request, listed as follows: *Baltimore, MD/Washington, D.C.; Boston, MA; Chicago, IL; Denver, CO; Houston, TX; Los Angeles, CA; Miami/Ft. Lauderdale, FL; New York, NY; San Francisco/Oakland, CA; and Seattle/Tacoma, WA.*





# Retailers

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Ahold Delhaize

Albertsons Companies

Alex Lee

Bashas'

Big Y

Brookshire Grocery

Dierbergs Markets

Four B

Giant Eagle

HAC, INC

Kroger

Meijer

Price Chopper

Publix

Raley's

Schnucks

The Save Mart Companies

Tops

Wegmans

Target

Walmart

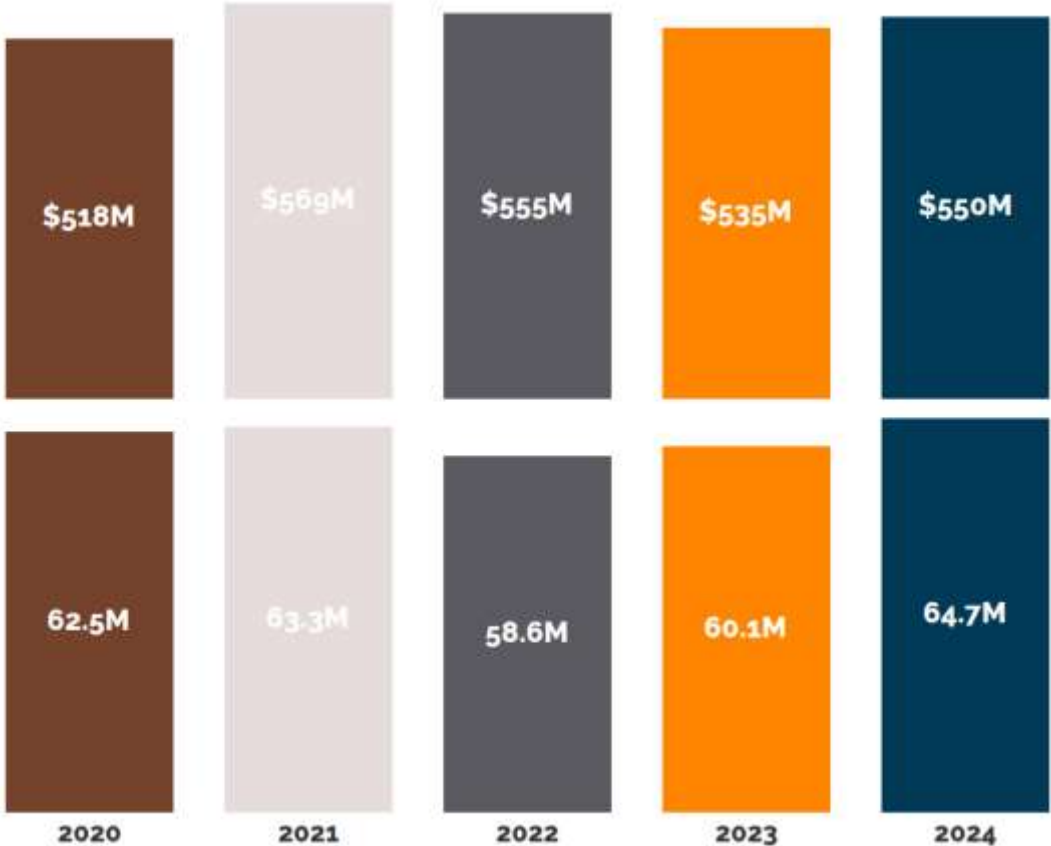
Sam's Club



# TOTAL U.S. LAMB SALES

# U.S. Lamb Sales – American Lamb + Imports

Dollar and Volume Sales, 2020 - 2024



Dollar sales of lamb were up

**2.8%**

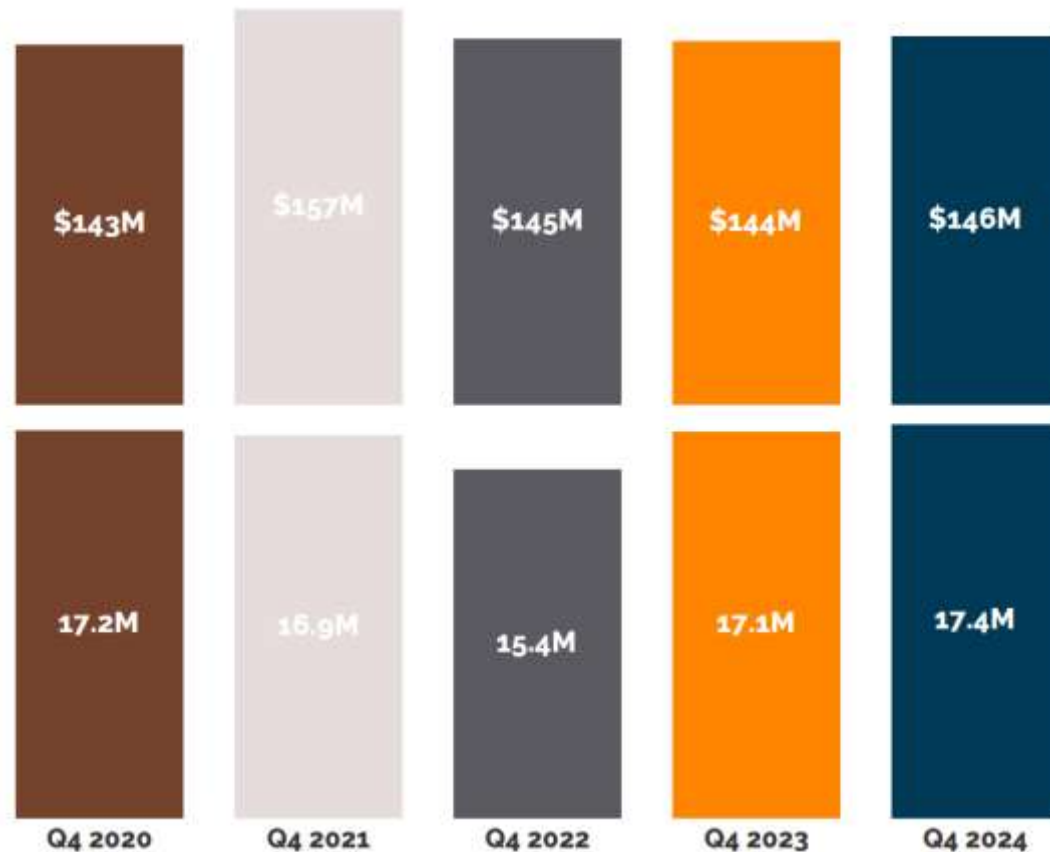
in 2024 compared to 2023, and volume sales are up

**7.6%**



# U.S. Lamb Sales – American Lamb + Imports

Dollar and Volume Sales, Q4 2020 – Q4 2024



Dollar sales of lamb are up

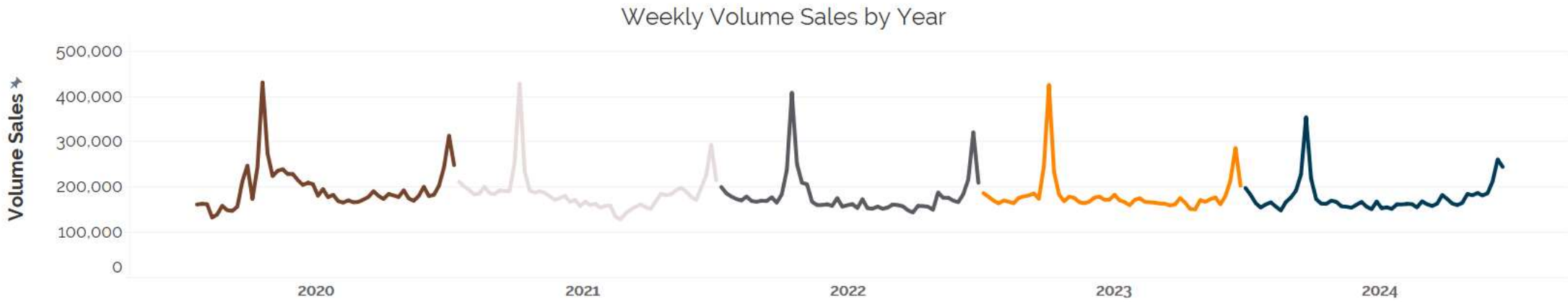
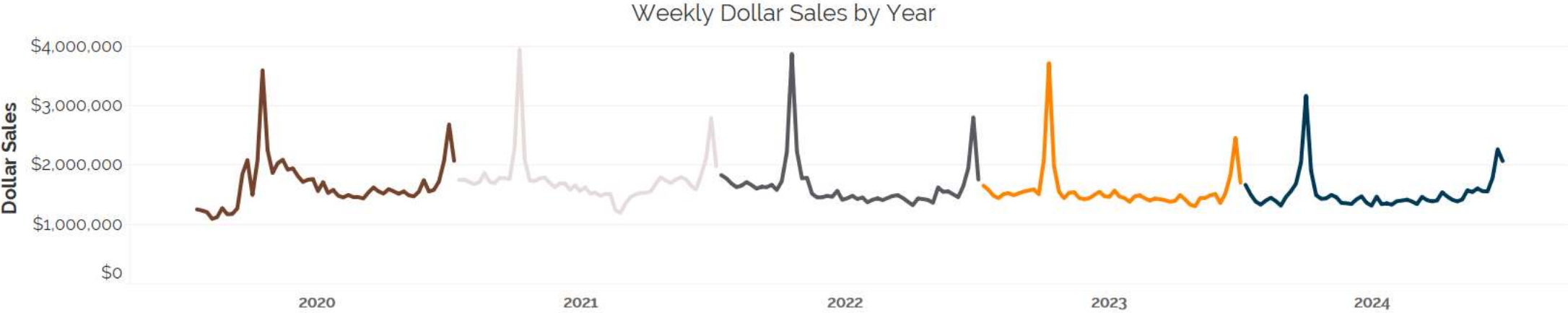
**1.4%**

in Q4 2024 compared to Q4 2023, and volume sales are up

**2.0%**

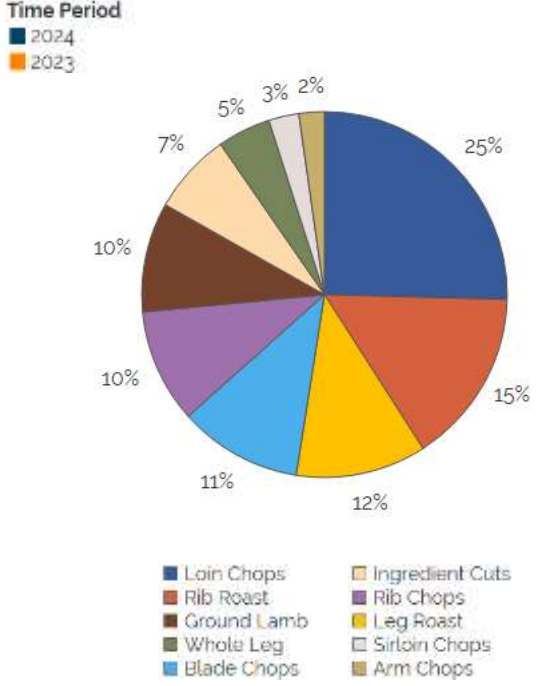
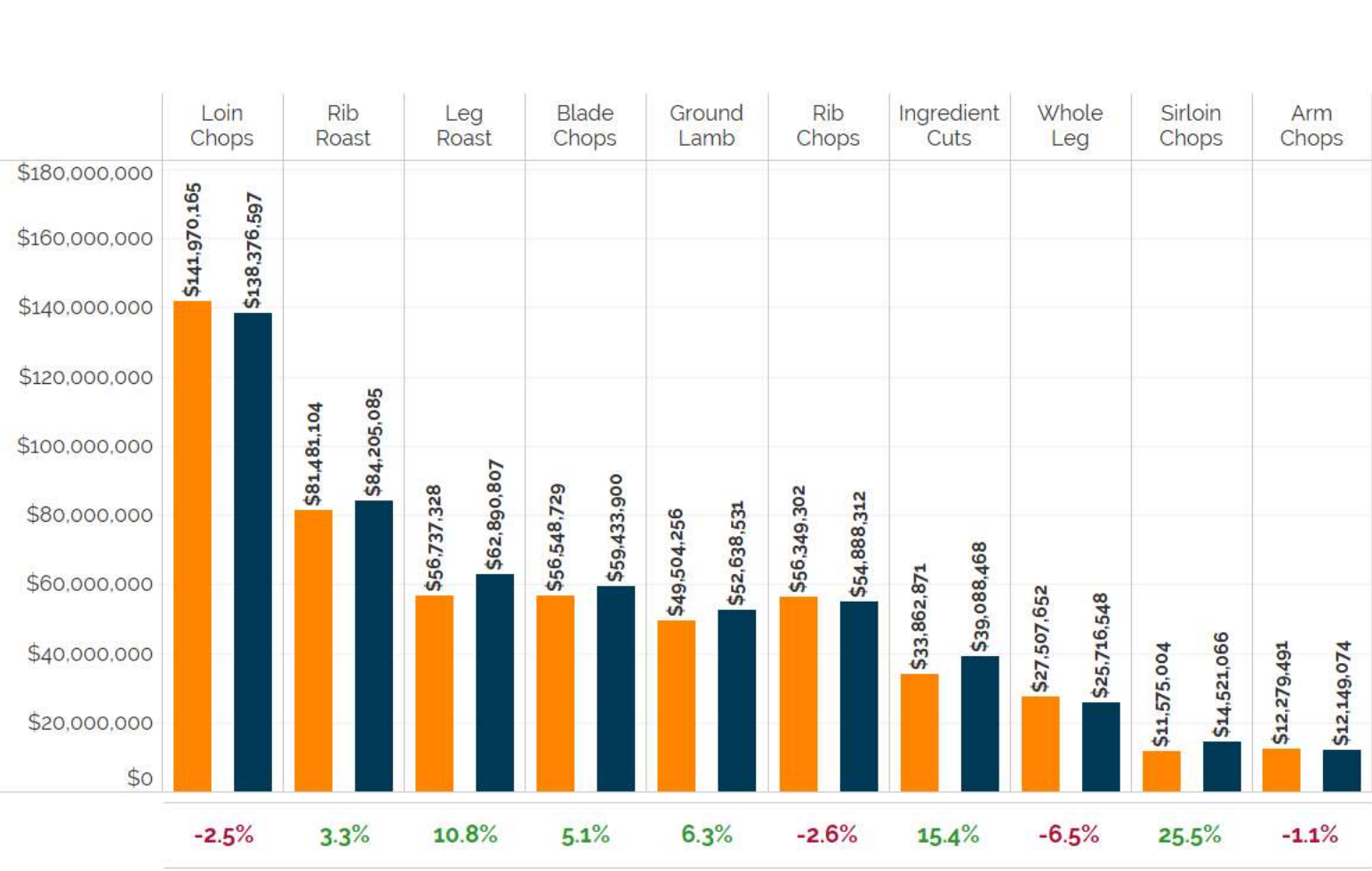
# U.S. Lamb Sales – American Lamb + Imports

## Weekly Dollars and Pounds Sold by Year



# U.S. Lamb Sales – American Lamb + Imports

## Dollar Sales of Lamb Retail Cuts, 2024 vs. 2023



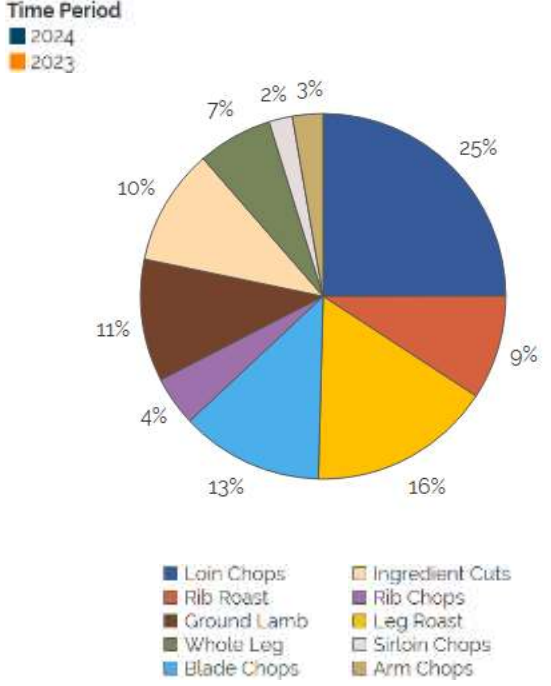
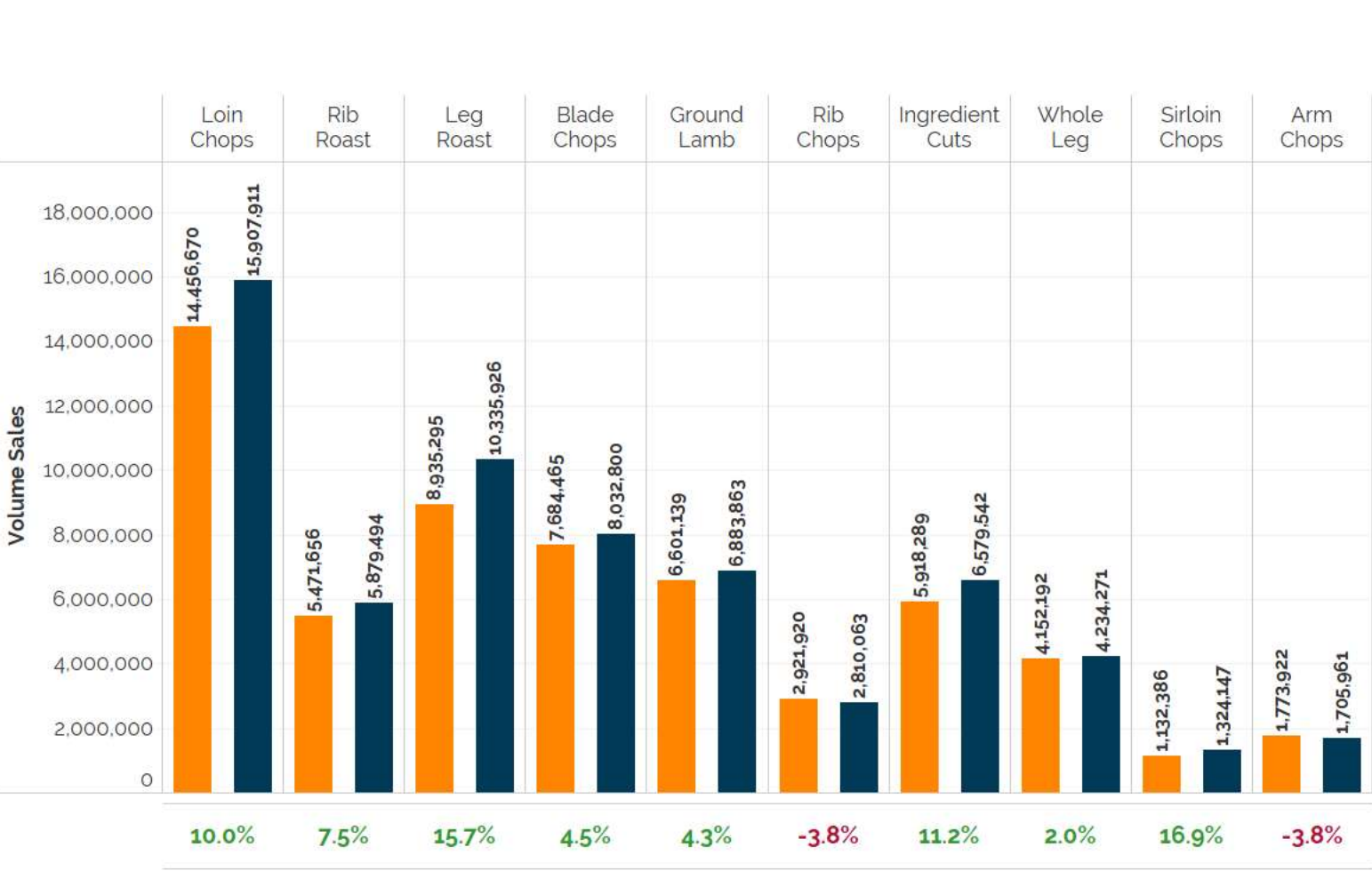
**\$549,642,064**  
Total Dollar Sales





# U.S. Lamb Sales – American Lamb + Imports

## Volume Sales of Lamb Retail Cuts, 2024 vs. 2023

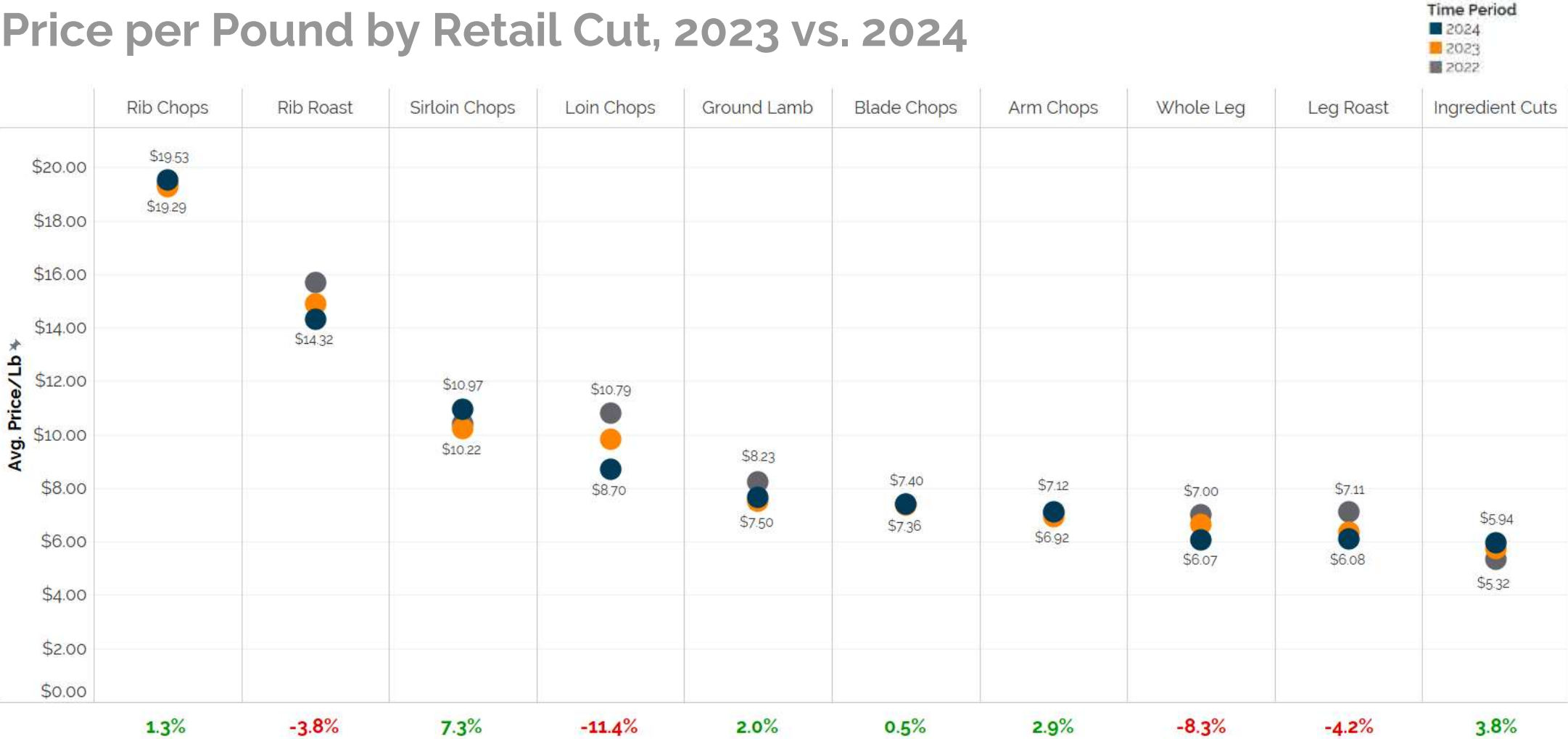


**64,702,555**  
Total Pounds Sold



# U.S. Lamb Sales – American Lamb + Imports

## Price per Pound by Retail Cut, 2023 vs. 2024

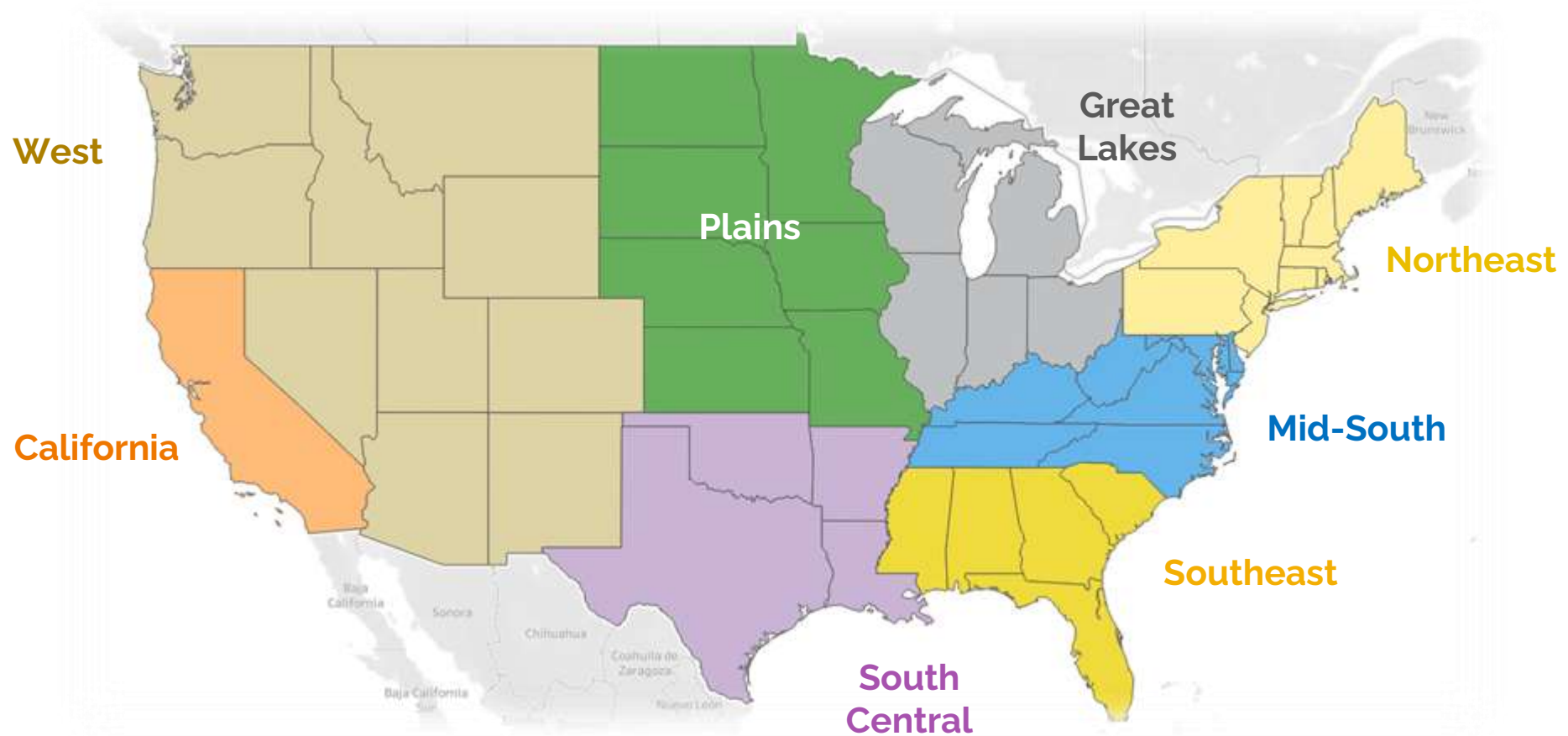


# Regions & Markets



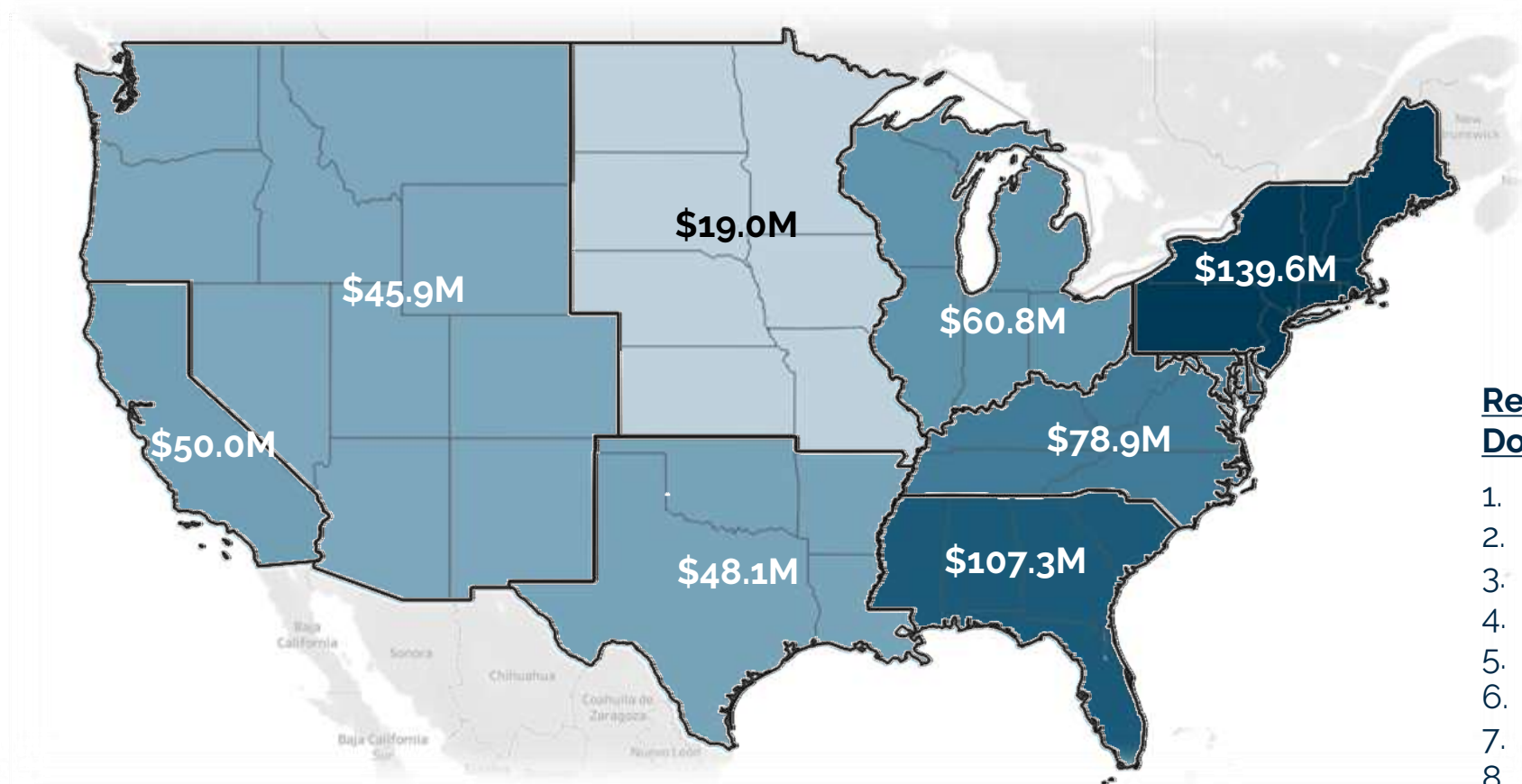
# Circana-Defined U.S. Regions

## Corresponding States



# U.S. Regions

## Total Dollar Sales, 2024

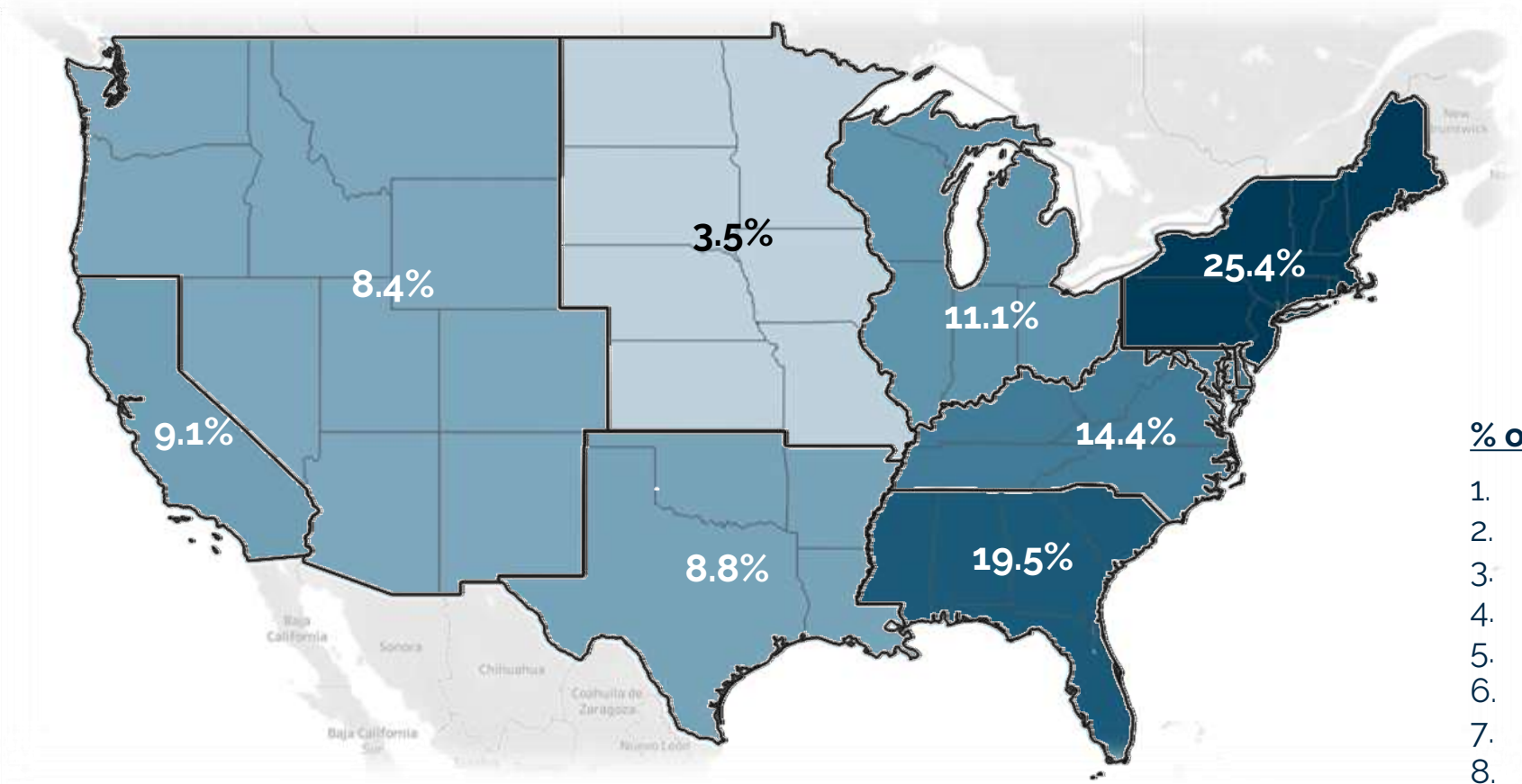


### Regions Ranked by Dollar Sales:

1. Northeast (\$139.6M)
2. Southeast (\$107.3M)
3. Mid-South (\$78.9M)
4. Great Lakes (\$60.8M)
5. California (\$50.0M)
6. South Central (\$48.1M)
7. West (\$45.9M)
8. Plains (\$19.0M)

# U.S. Regions

## Percent of Total U.S. Lamb Sales, 2024



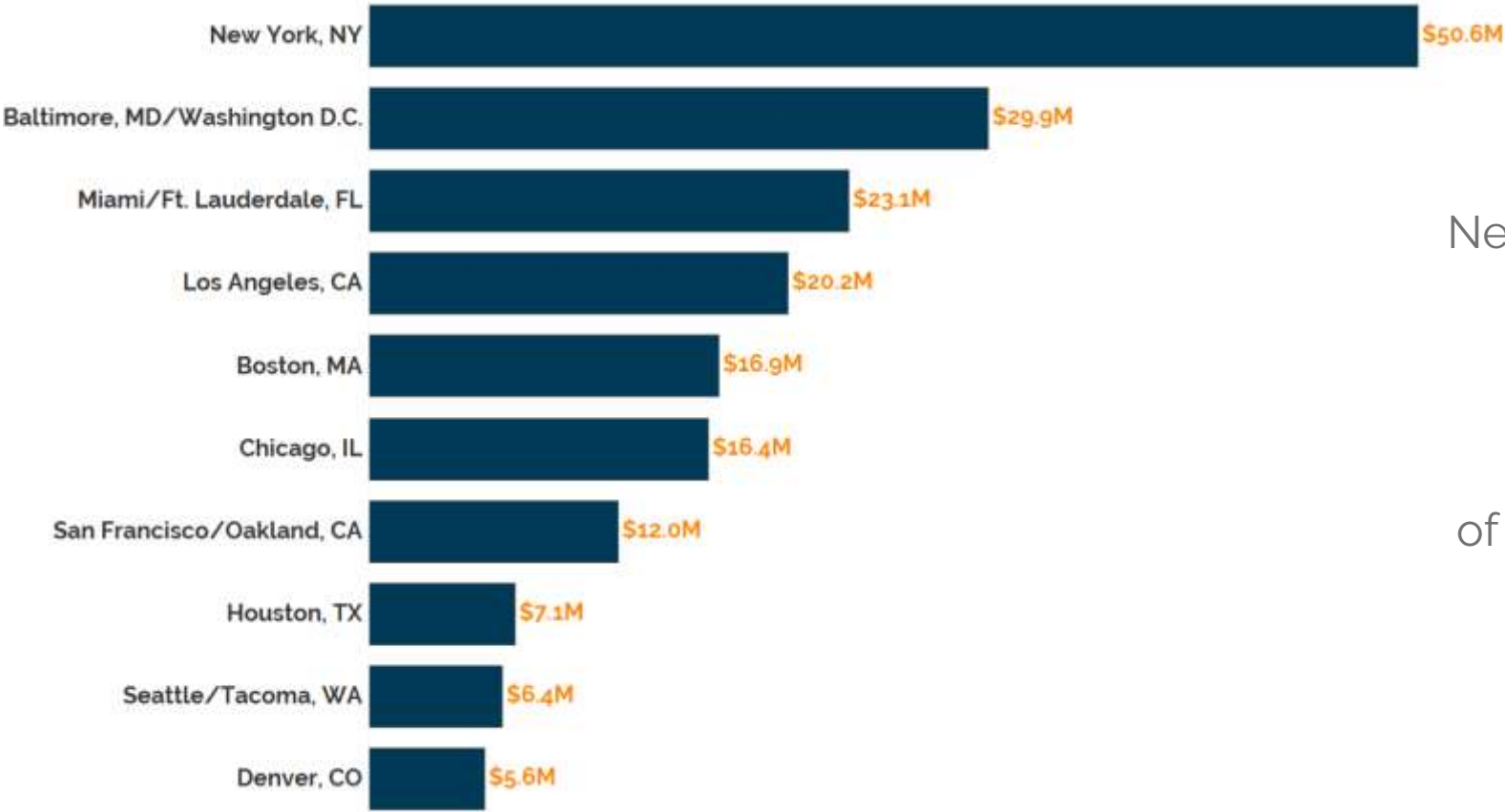
### % of Total U.S. Sales

1. Northeast (25.4%)
2. Southeast (19.5%)
3. Mid-South (14.4%)
4. Great Lakes (11.1%)
5. California (9.1%)
6. South Central (8.8%)
7. West (8.4%)
8. Plains (3.5%)



# Highlighted Markets

Ranked by Dollar Sales, 2024



New York City accounts for

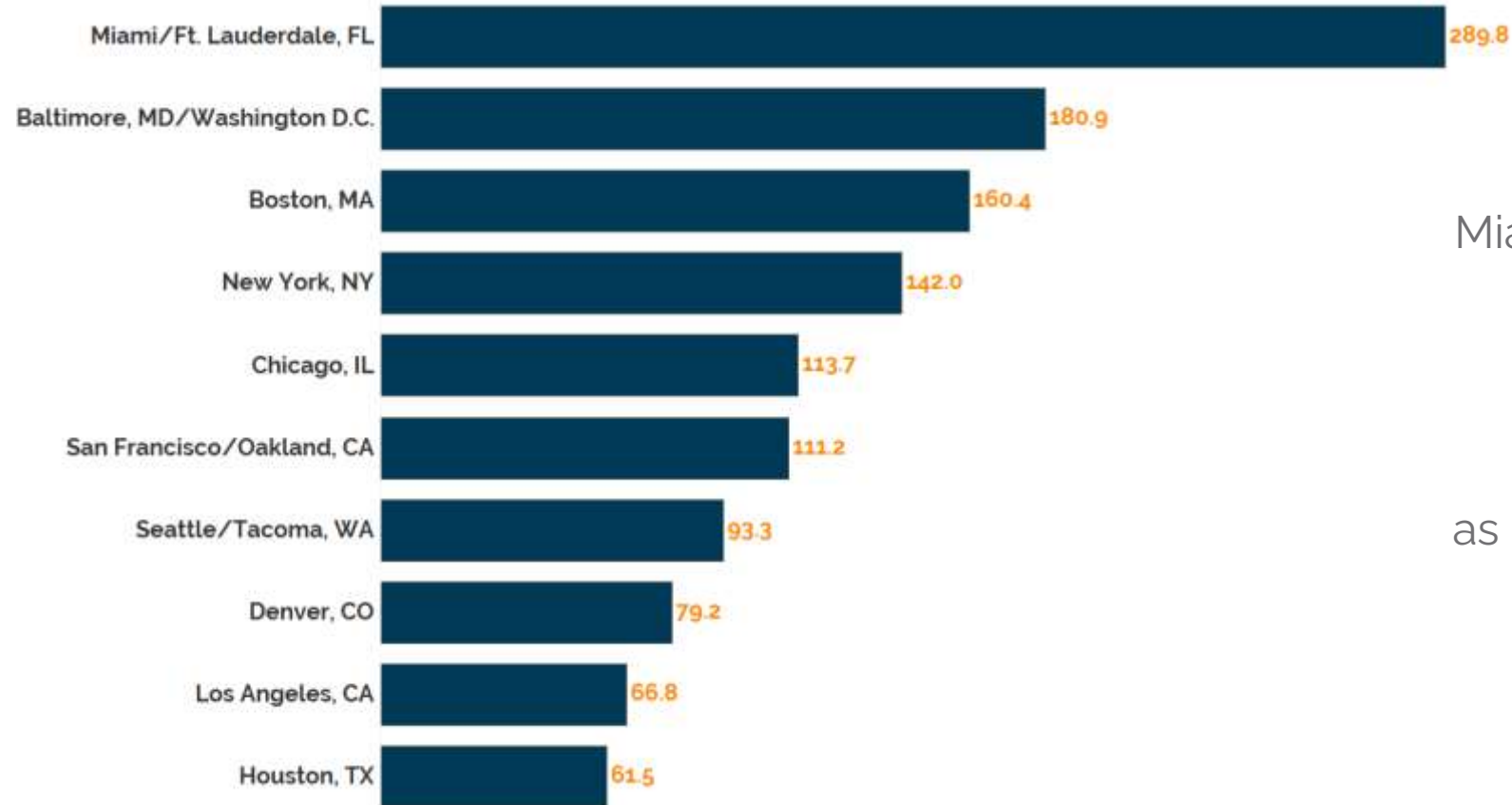
**9.2%**

of total lamb sales at retail in the U.S.



# Highlighted Markets

Ranked by CDI (Category Development Index), 2024



Miami, FL consumes nearly

**3X**

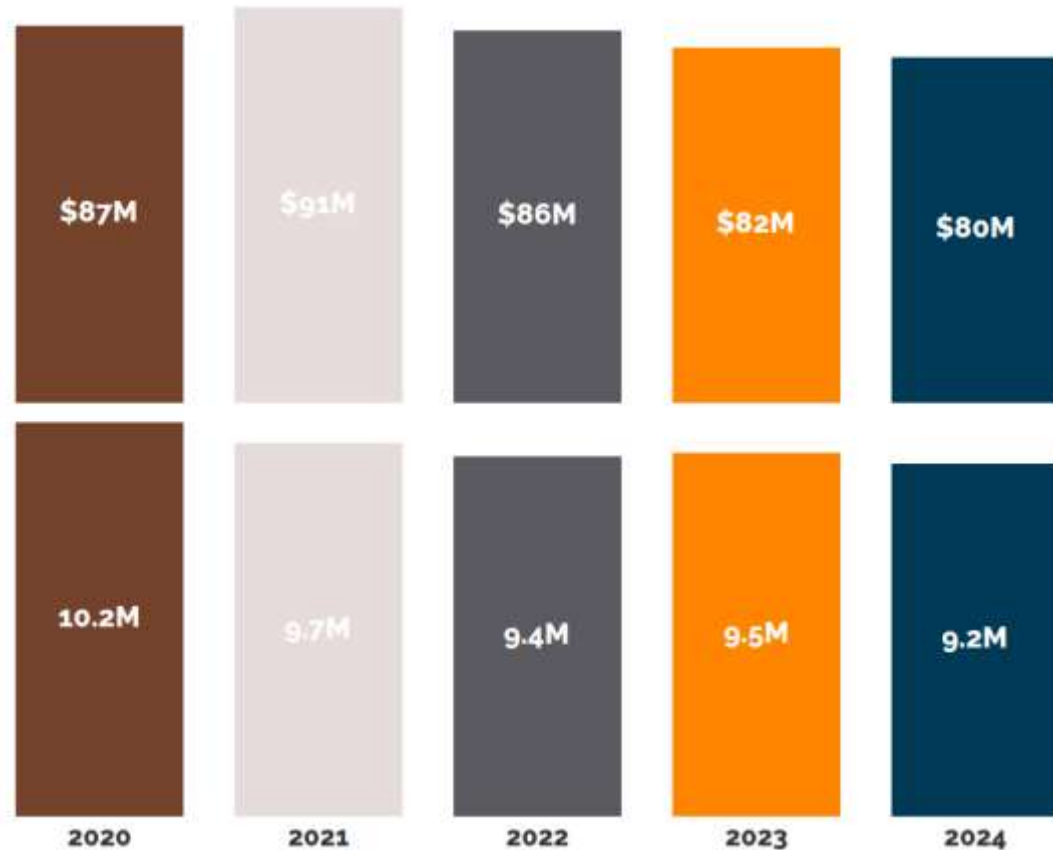
as much lamb per capita as  
the U.S. overall



# **AMERICAN LAMB BOARD (ALB) - SELECT RETAILERS**

# ALB Select Retailers

Dollar and Volume Sales, 2020 – 2024



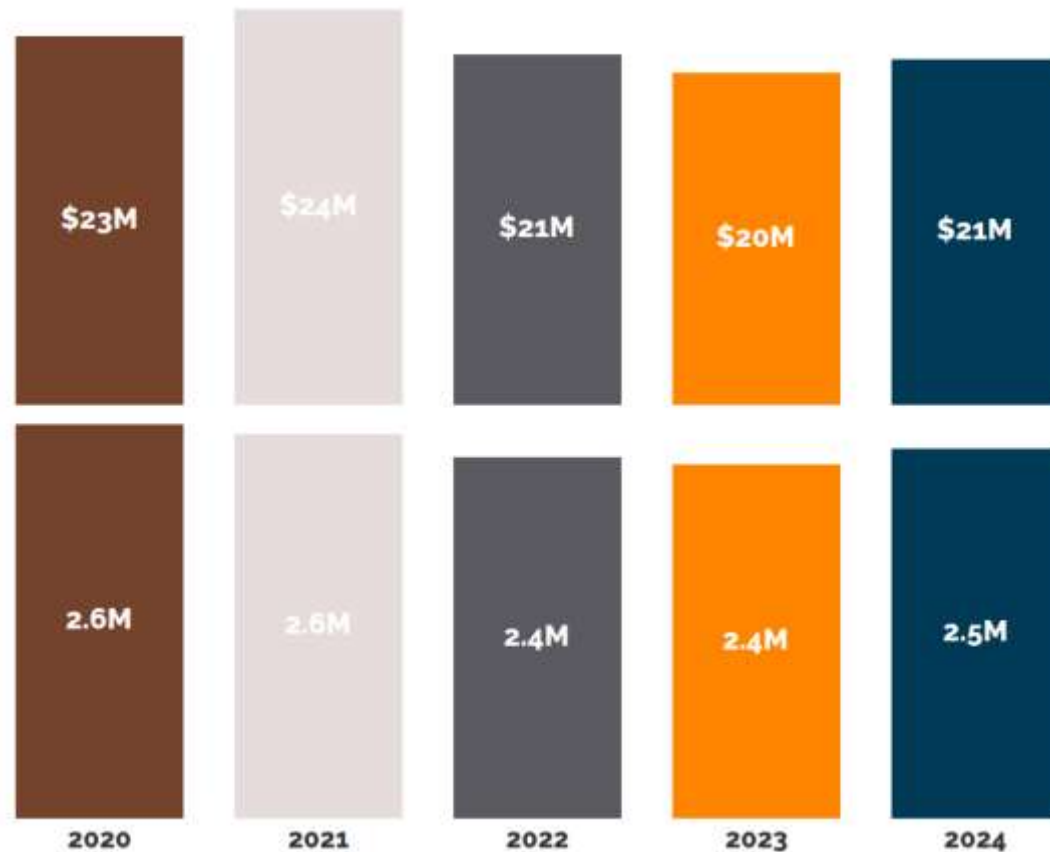
Sales of American lamb have come down since 2021.

**\$: -2.4%**

**Lbs: -3.0%**

# ALB Select Retailers

Dollar and Volume Sales, Q4 2020 – Q4 2024



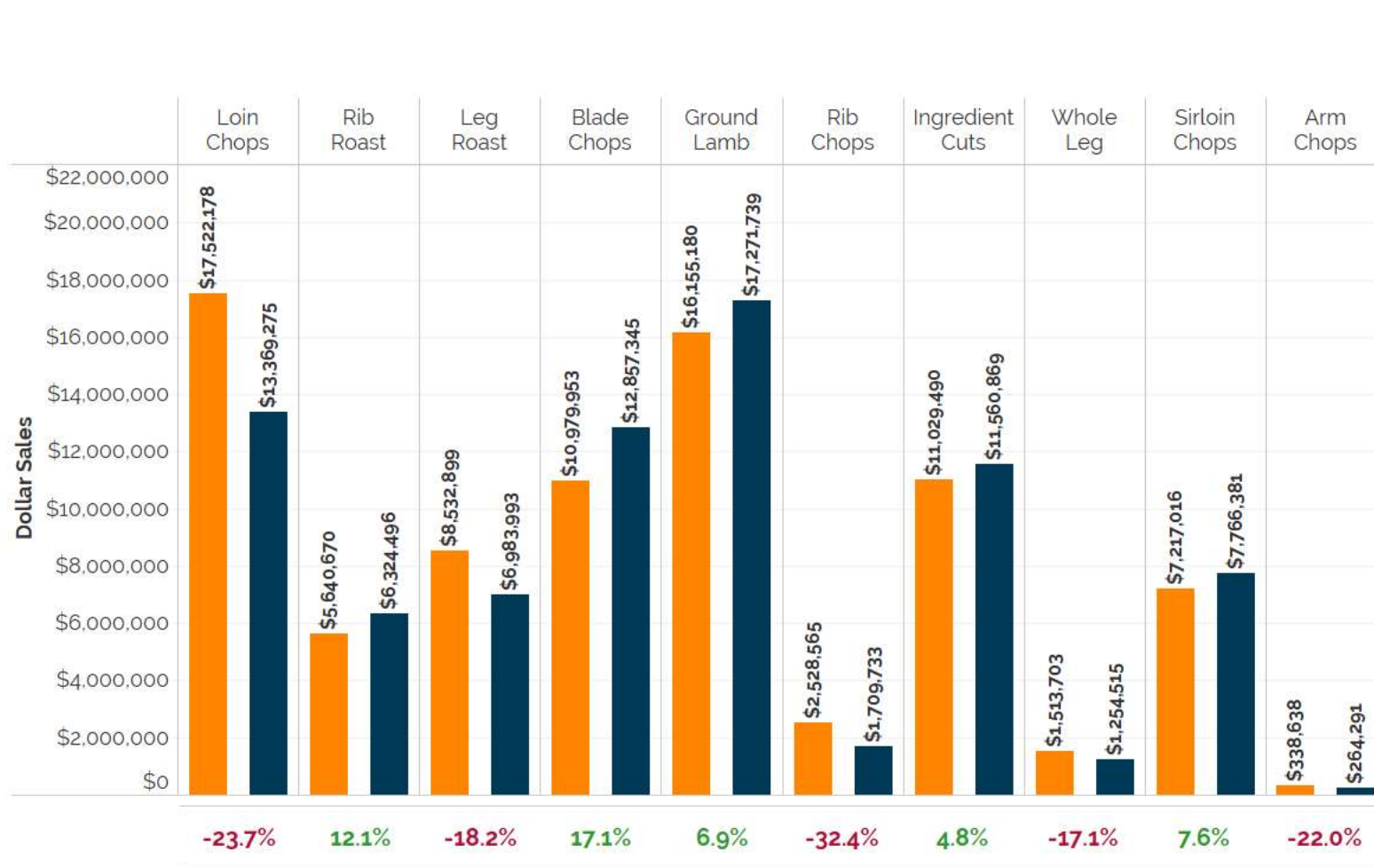
Q4 shows an increase in both dollar and volume sales of American Lamb

**\$: +4.3%**

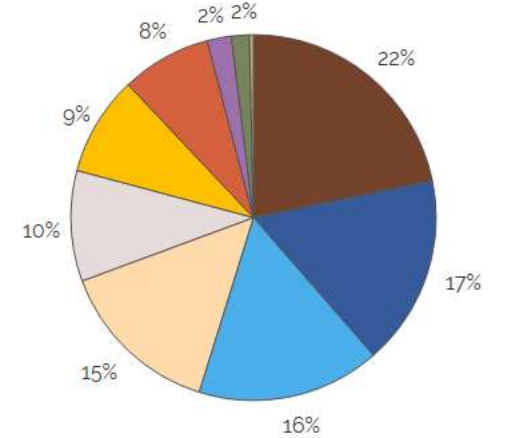
**Lbs: +4.5%**

# ALB Select Retailers

## Dollar Sales of Lamb Retail Cuts, 2024 vs. 2023



Time Period  
 ■ 2024  
 ■ 2023



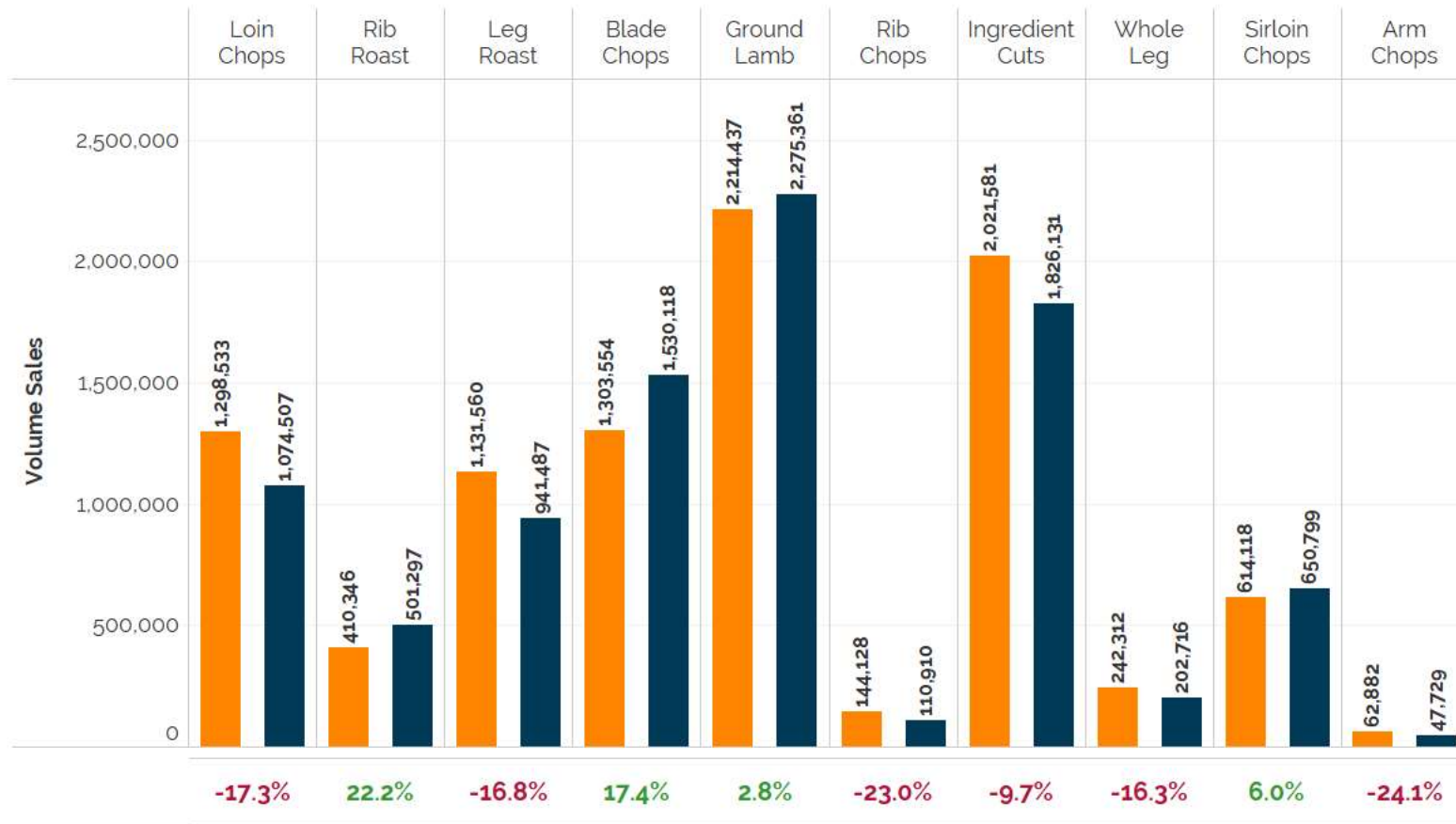
■ Loin Chops  
 ■ Rib Roast  
 ■ Ground Lamb  
 ■ Whole Leg  
 ■ Blade Chops  
 ■ Ingredient Cuts  
 ■ Rib Chops  
 ■ Leg Roast  
 ■ Sirloin Chops  
 ■ Arm Chops

**\$79,509,356**  
 Total Dollar Sales

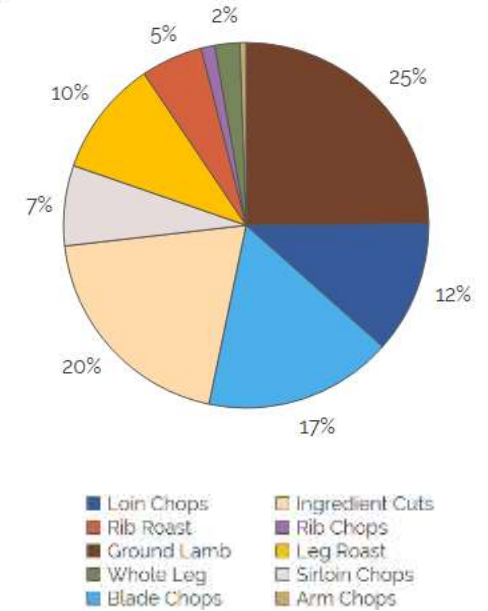


# ALB Select Retailers

## Volume Sales of Lamb Retail Cuts, 2024 vs. 2023



Time Period  
 ■ 2024  
 ■ 2023



**9,179,406**  
 Total Pounds Sold





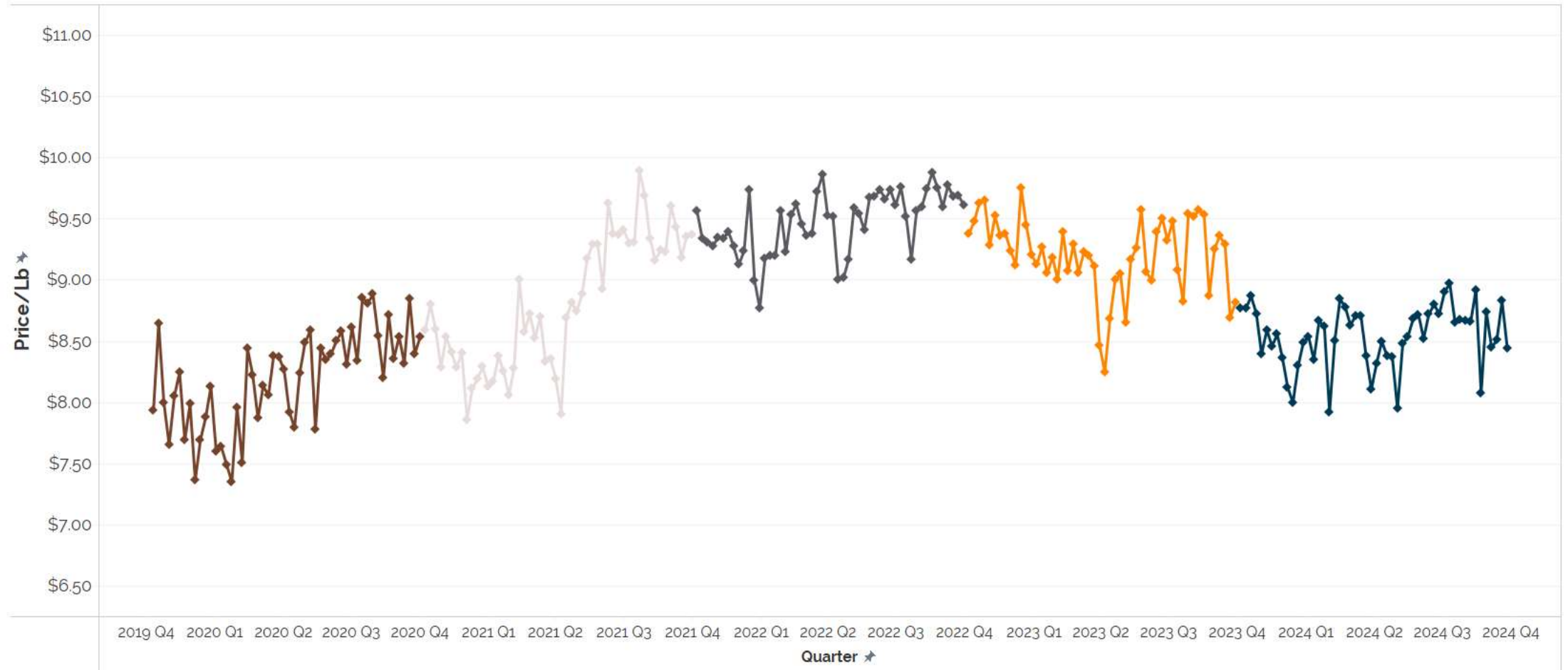
# ALB Select Retailers vs. Total Lamb

## Price per Pound by Retail Cut, 2024



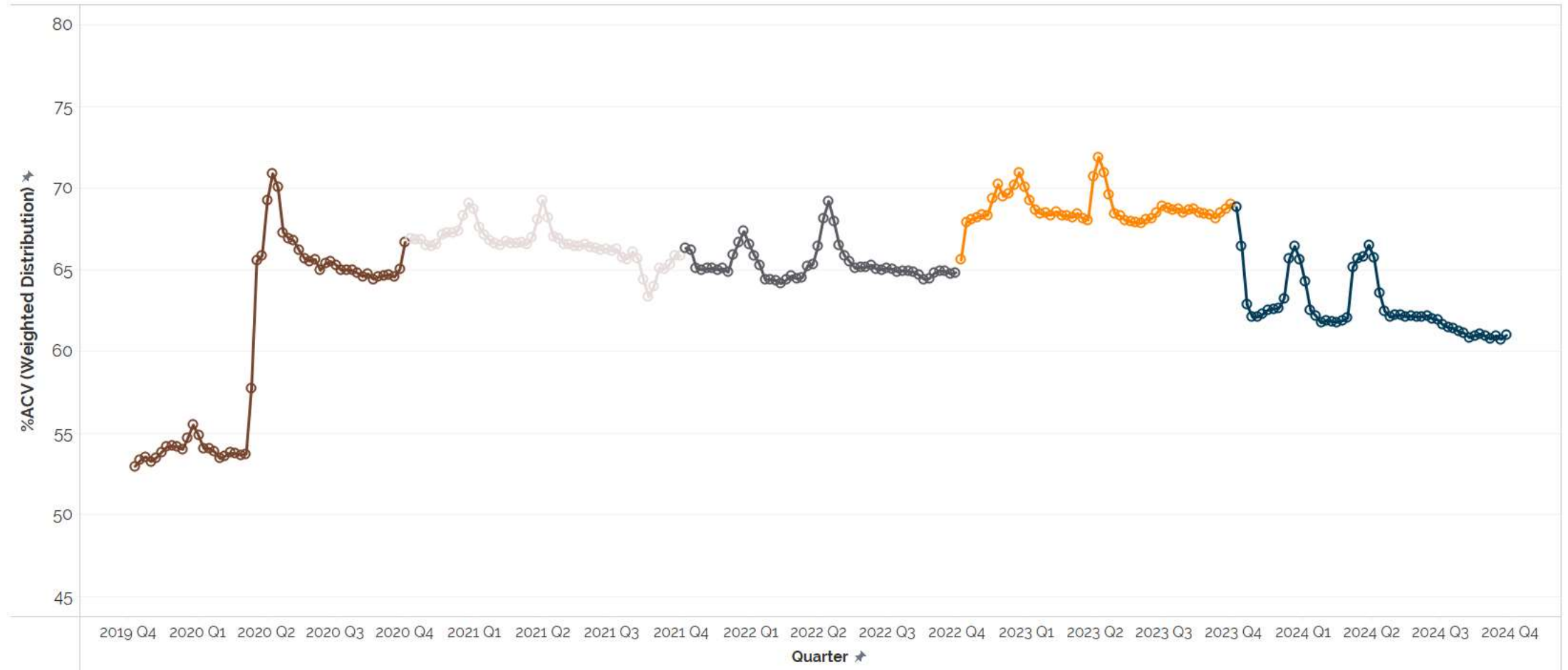
# Total Lamb – Price of Lamb

## Average Price/Lb. of Lamb by Week and Year



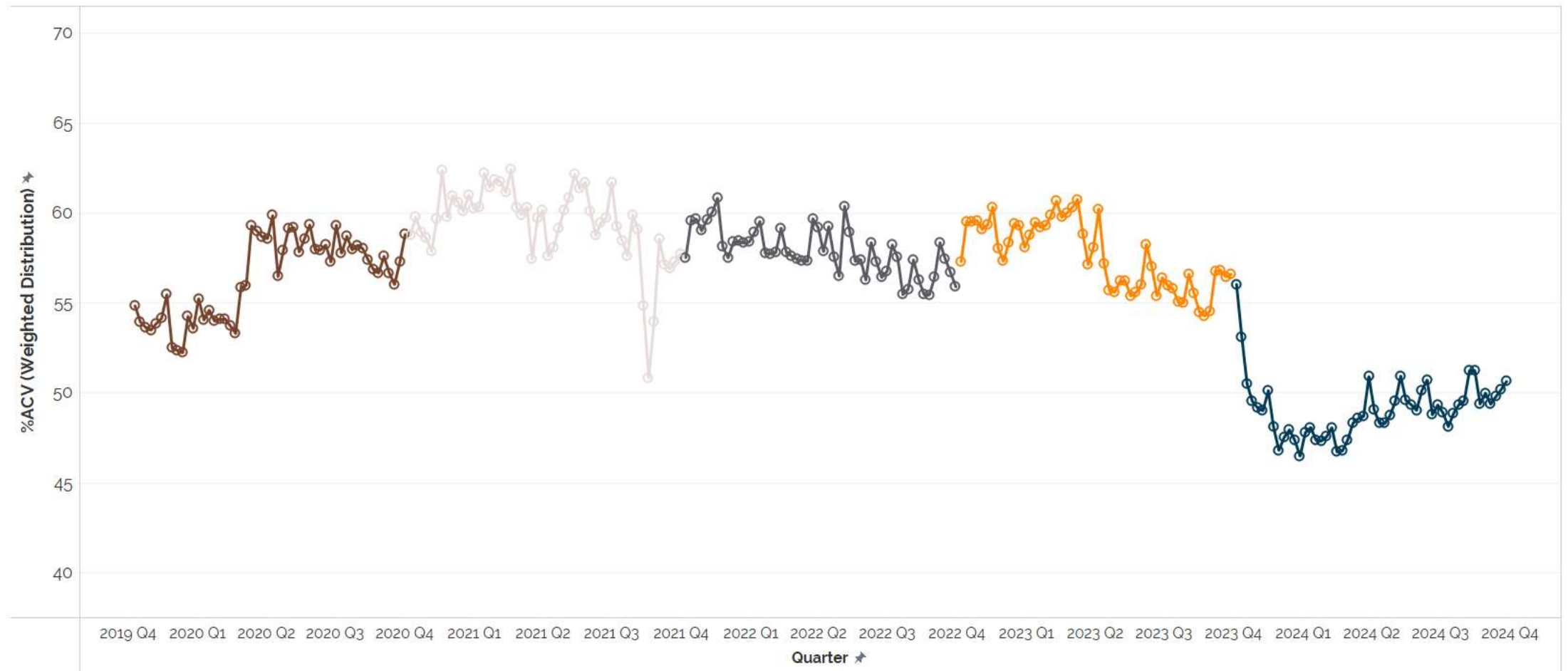
# ALB Select Retailers – Distribution of Lamb

## %ACV of Non-Imported Lamb by Week and Year



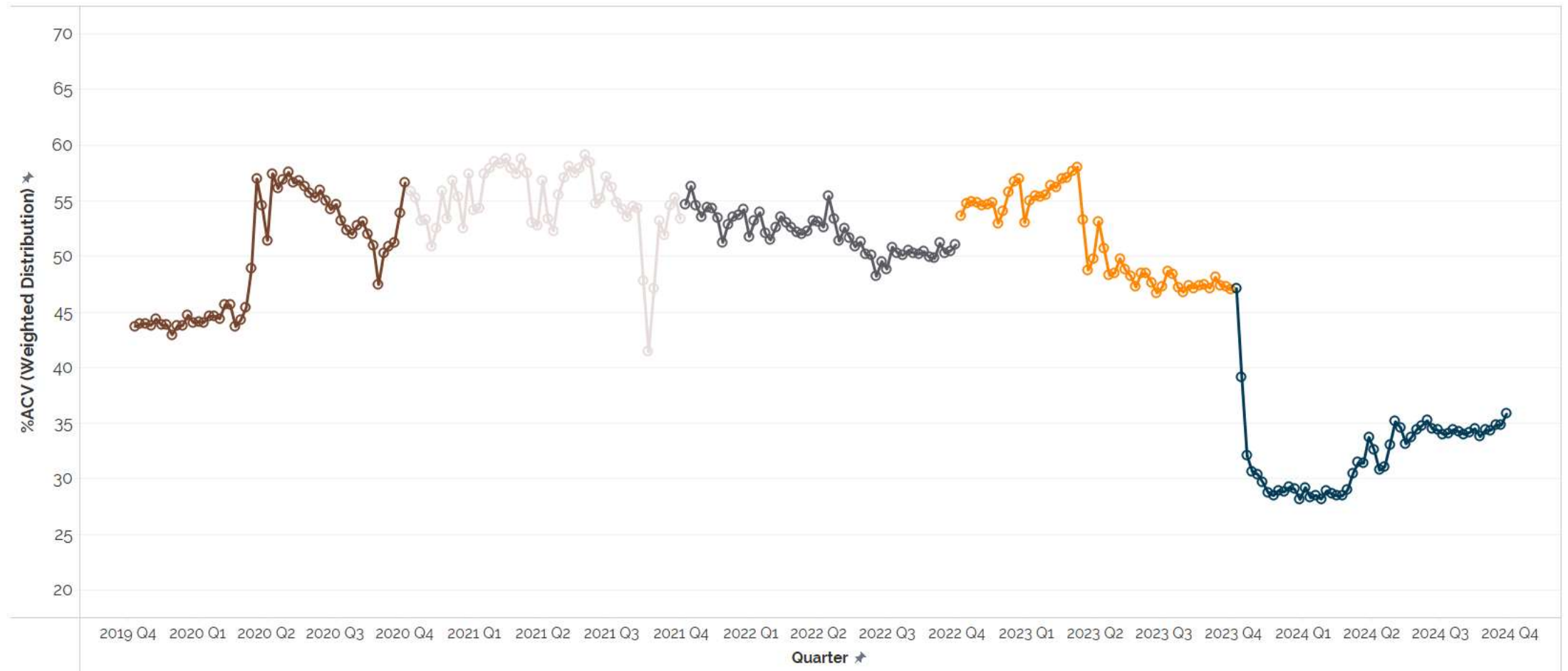
# Total Lamb – Distribution of Loin Chops

## %ACV of Loin Chops by Week and Year



# ALB Select Retailers – Distribution of Loin Chops

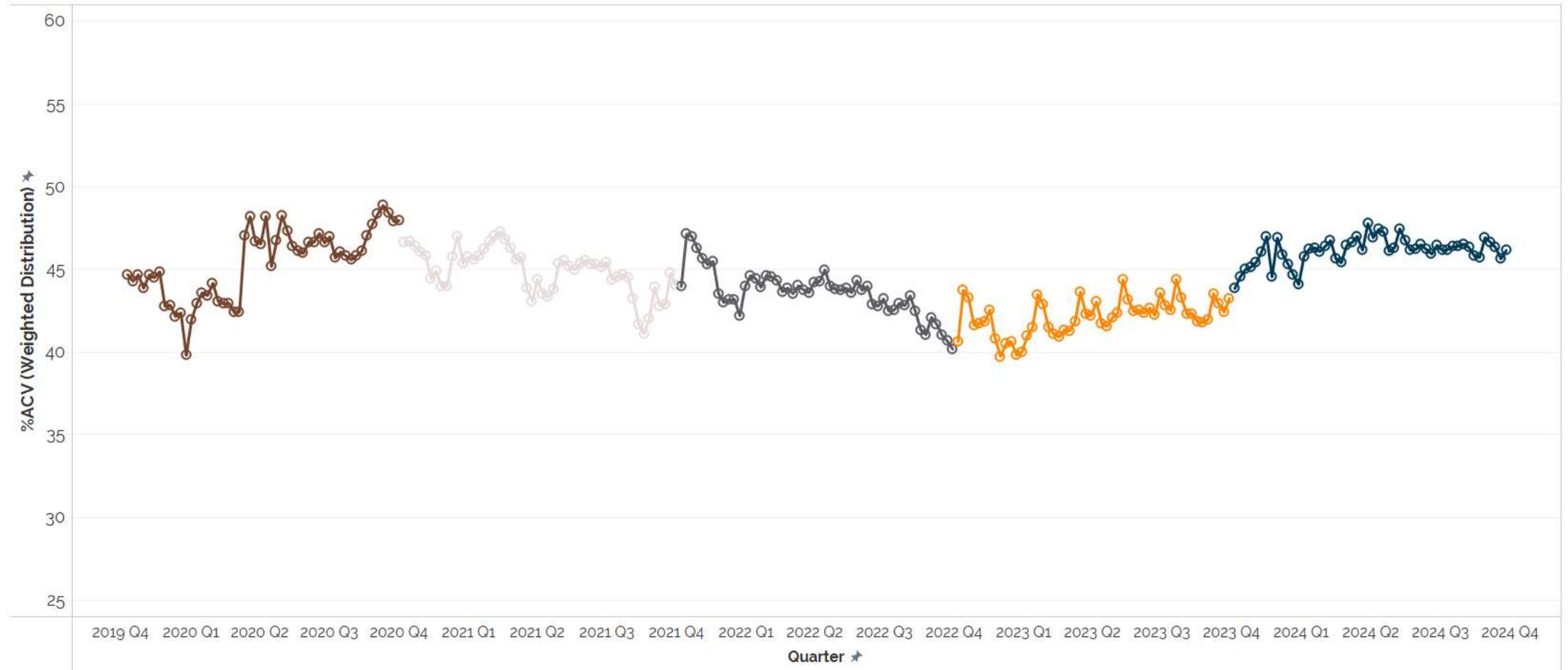
## %ACV of Loin Chops (Non-Imports) by Week and Year





# Total U.S. – Distribution of Blade Chops

## %ACV of Blade Chops by Week and Year

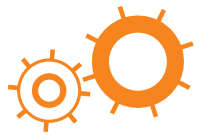




Marketing know-how to increase your meat sales.

It's a challenge to stand out in today's meat industry. Our strategic marketing, research and creative services help you to capture your customers' attention to sell more meat.

## Capabilities



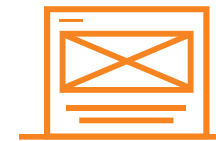
Brand Strategy



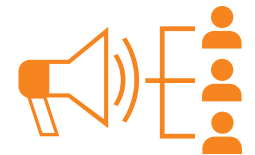
Data + Analytics



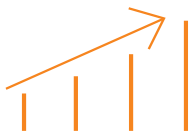
Video + Photography



Media



Public Relations



Research + Insights



Industry Consulting



Creative Solutions



Digital + Social

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