



American Lamb

SUMMIT

PROGRAM

FT. COLLINS, CO • AUGUST 27-28, 2019



SPONSORS



INAUGURAL LAMB SUMMIT 2019

Welcome to Colorado



My hope for this Summit is that we walk away inspired with strategies to improve our industry's competitiveness and profitability, and take back market share.

I have been serving on the American Lamb Board for the past 5½ years. How does a sheep producer from Michigan get here? I guess my love of sheep and sheep producers. I have had the opportunity to see sheep production systems in New Zealand, Australia, United Kingdom and Canada. I must say that our US sheep industry has a way to go to keep up the pace these countries are setting. We are not doing a lot of things wrong but there are many things we could be doing better.

Imports represent more than 60% of the lamb consumed in the US. Our industry must improve production efficiencies and deliver a more consistent, high-quality product at a price consumers will pay. Our farm gate prices are not likely to significantly increase when our products are already priced at a strong premium over competitors. How can we be expected to lower costs, increase production and not get paid more?

That is what the Lamb Summit is all about. We are going to explore how our industry can use genetics, nutrition, technology, knowledge and networks to increase productivity, make more money and produce a higher quality product.

At home, I am hopeful we can pass our sheep enterprises onto the next generation. If we collaborate to implement industrywide progressive production changes, we can regain market share from importers and supply more great American Lamb. That is why I am here.



Dale Thorne
Chairman
American Lamb Board

A very warm welcome to the first Lamb Summit. My goal for this event is to reverse the decline in the consumption of US Lamb by improving its perceived value to consumers and reducing its cost.

Why does US lamb's value need to be improved?

If our lamb is and has been so good, why do so many folks now buy beef, chicken, pork and imported lamb instead?

What, in my view, explains the dramatic fall in US Lamb consumption (less in annual per capita consumption than garlic)?

Industry leaders of beef, pork, chicken and imported lamb have worked hard at improving the value and desirability of their product while decreasing costs in the system. Each industry admitted changes were necessary, identified ways to make the changes then set about changing.

US Lamb lacks consistency.

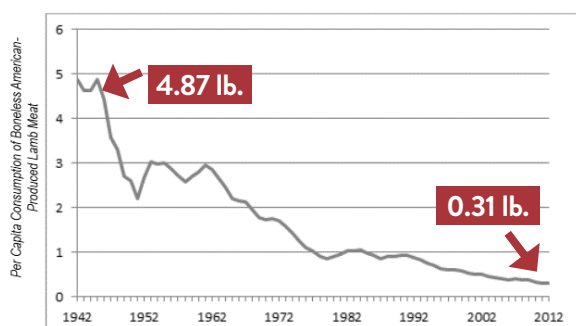
It can be both wonderful and, at times, disappointing. And it's hard to forget a bad lamb eating or cooking experience. US Lamb has focused on larger and heavier lambs while foreign competitors have focused on more muscle per pound of carcass. Have we erred in this? Consider that US government systems for cheap immigrant labor and summer grazing, plus lamb purchases, may have cushioned some Western industry leaders from financial realities that other producers face.

Here is what I hope we discuss at this summit.

What is imported lamb doing to improve its product and what can be done so we better compete? How can we produce the same amount at less cost? What are the top four things that US producers do, or fail to do, that reduce consistency? How can we increase muscle without reducing quality?

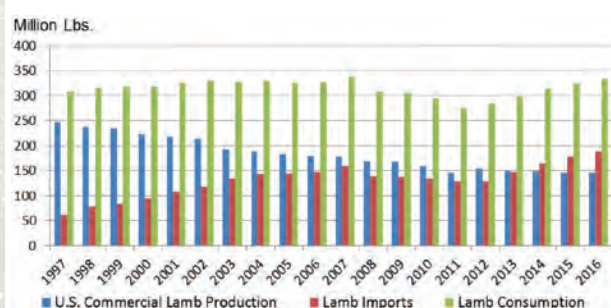
Per Capita Consumption of American Produced Lamb, 1942-2012

Federally Inspected Lamb Only



SOURCE: Economic Research Service, U.S. Department of Agriculture, supply and disappearance data

US Lamb Production, Imports and Consumption



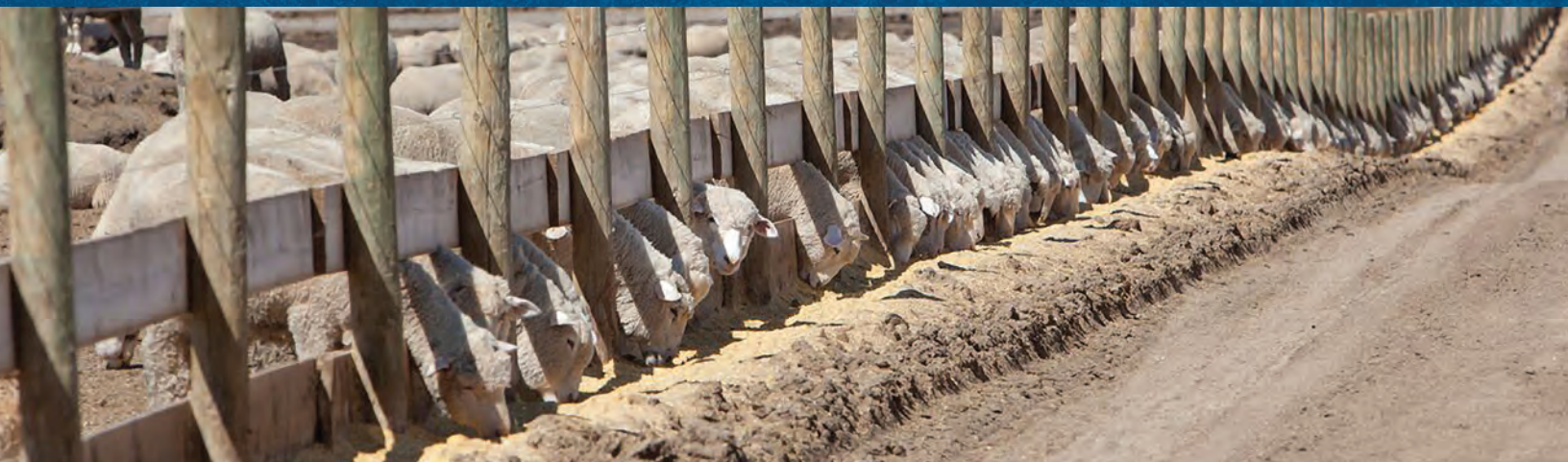
SOURCE: 2016 Sheep Industry Review Prepared by the American Sheep Industry Association for the American Lamb Board, March 2017 (not counting freezer inventory nor US exports); based upon USDA NASS and ERS data



Stan Potratz
Founder
Premier 1 Supplies, LLC

Summit Headquarters

Hilton Ft. Collins
425 W. Prospect Rd.
Ft. Collins, CO 80526
(970) 482-2626



August 27, 2019

7:00am-8:00am

Opening Session

Hilton Salon 1 & 5

- ▲ **Welcome:** Stan Potratz—Premier 1 Supplies, Dale Thorne—American Lamb Board
 - ▲ **Opening Remarks and Goals:** Bob Ludwig—Emcee
-

8:00am-9:15am

“Meating” the Needs of the New Lamb Consumer

Hilton Salon 1 & 5

This session will look at the new generation of lamb eaters through the lens of producing what they want. The panel will explore opportunities for the US Lamb industry to increase its market share by delivering the values and attributes our customers and consumers want at a price they are willing to pay.

- ▲ **Moderator:** Michael Uetz—Midan Marketing
 - ▲ **Panelists:** Faith Garrard—Raley’s
-

9:15am-10:30am

A Global Perspective on Lamb Quality and Value Attributes

Hilton Salon 1 & 5

Guests from the United Kingdom and Australia will share what their lamb industries are doing to improve the value of products and meet the expectation of customers. Panelists will share insights on how lamb producers can manage the relationship between eating quality and lean meat yield.

- ▲ **Moderator:** Stan Potratz—Premier 1 Supplies
 - ▲ **Panelists:** Phil Hadley—Agriculture and Horticulture Development Board (UK), Dave Pethick, PhD—Murdoch University (AUS)
-

10:40am

Buses depart for Colorado State University Agricultural Research, Development and Education Center (ARDEC)

11:30am-12:30pm

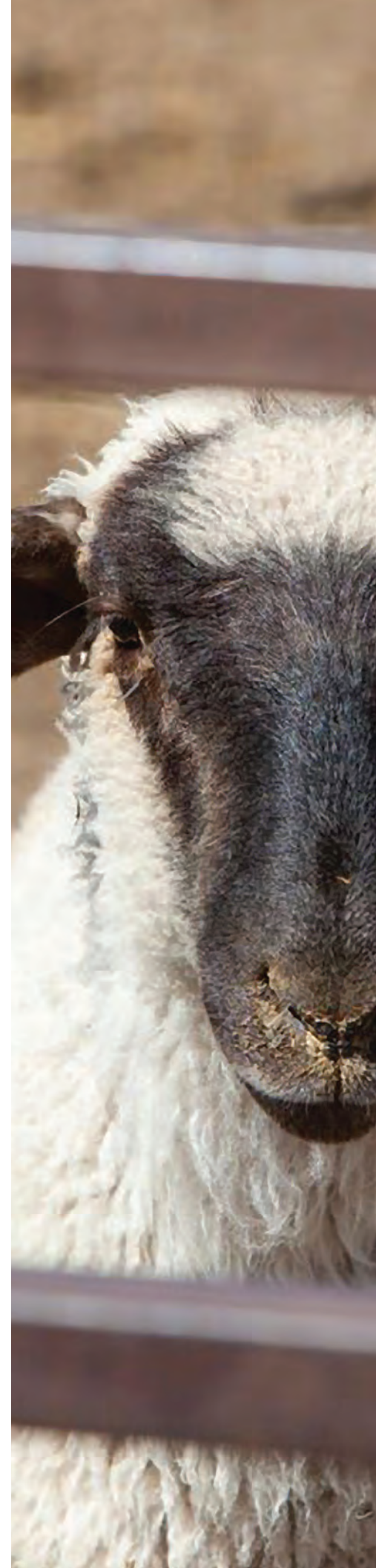
Lunch

CoBank Center

12:30pm-3:00pm

Educational Stations

Attendees will be organized into 3 groups and will rotate between all stations.



August 27, 2019 (cont.)

STATION 1

Understanding Genetic Selection Technologies: Current and Future Tools to Influence End-Product Profitability

ARDEC Sheep Unit

- ▲ **Leaders:** Rusty Burgett—National Sheep Improvement Program, Brenda Murdoch, PhD—University of Idaho, Tom Boyer—Boyer Land & Livestock, Bill Shultz—Bunker Hill Farm

STATION 2

Farmgate Efficiencies: Production Management Tools that Add Value to your Operation

Taylor Center Classroom

- ▲ **Leader:** Laurie Johnson—Pipestone Lamb & Wool Program

STATION 3

Utilizing Innovation and Technology to Improve Value, Reduce Operational Costs and Increase Profits

ARDEC Sheep Unit

- ▲ **Leaders:** Reid Redden, PhD—Texas A&M AgriLife Extension, Jake Thorne—Texas A&M AgriLife Extension

12:30pm-1:30pm

Educational Stations First Rotation

1:45pm-2:45pm

Educational Stations Second Rotation

2:45pm-3:45pm

Break

CoBank Center

- ▲ Company and national organization exhibits
- ▲ Lamb research poster presentations

4:00pm-5:00pm

Educational Stations Third Rotation

5:00pm-7:30pm

BBQ and Awards Program

Taylor Center

7:30pm

Buses depart for Hilton

August 28, 2019

7:00am-7:30am

Continental Breakfast
Hilton Salon 1 & 5

7:30am-8:00am

Day 2 Kickoff
Hilton Salon 1 & 5

- ▲ Bob Ludwig—Emcee
-

8:00am-9:00am

Out of Season Lambing Opportunities and Costs
Hilton Salon 1 & 5

This session will explore opportunities to improve the consistency and quality of American Lamb through increased supplies of market-ready lambs from May through August. The discussion will include a look at the costs of out-of-season lambing and whether or not it is likely to reap enough financial reward.

- ▲ **Moderator:** Reid Redden, PhD—Texas A&M AgriLife Extension
 - ▲ **Panelists:** Alex Moser—Iowa lamb producer, Brad Anderson—Mountain States Rosen, David Anderson, PhD—Texas A&M University, Richard Ehrhardt, PhD—Michigan State University
-

9:00am-10:00am

Understanding Carcass Quality & Traceability
Hilton Salon 1 & 5

This session will examine tools and technology that the US Lamb industry can implement to improve the value of our products, improve the traceability of value traits and increase feedback related to carcass quality throughout the supply chain.

- ▲ **Moderator:** Keith Belk, PhD—Colorado State University
 - ▲ **Panelists:** Rob Jennings—BeefChain, Lesa Eidman—Superior Farms, Henry Zerby, PhD—Wendy's Quality Supply Chain Co-op Inc.
-

10:15am

Buses depart for Colorado State University JBS Global Food Innovation Center

10:35am-1:00pm

Lamb Quality Stations
Meat Lab

Attendees will go back to their assigned groups and rotate between all stations.



August 28, 2019 (cont.)

STATION 1

What's the Perfect Carcass Target?

GFIC Meat Lab

- ▲ **Leaders:** Henry Zerby PhD—Wendy's Quality Supply Chain Co-op Inc., Francis Potter—Mountain States Rosen, Gustavo Fernandez—Superior Farms

STATION 2

Understanding your Grid: Value-Based Marketing

GFIC 161

- ▲ **Leaders:** Cody Hiemke—Niman Ranch, Brian Phelan—Superior Farms, Brad Anderson—Mountain States Rosen

STATION 3

REIMS (Flavor) Technology

ANSCI 131

- ▲ **Leader:** Jessica Prenni, PhD—Colorado State University

10:35am-11:20am

First Rotation

11:25am-12:10pm

Second Rotation

12:15pm-1:00pm

Third Rotation

1:15pm -2:15pm

Lamb Flavor: Eating Quality Discussion and Tasting

Alumni Center

- ▲ Dale Woerner, PhD—Texas Tech University

2:15pm-3:00pm

Final Session: Where Are We Headed?

Alumni Center

- ▲ **Young Entrepreneurs:** Our industry's brightest young leaders will share their views on the key opportunity within the US lamb industry and how they will influence the future generation of farmers and ranchers.
 - ▲ Rebecca Miller, Ryan Mahoney, David Fisher
- ▲ **Program Highlights:** Bob Ludwig—Emcee
- ▲ **Closing:** Stan Potratz—Premier 1 Supplies, Dale Thorne—American Lamb Board

Speakers



STAN POTRATZ

Founder, Premier 1 Supplies

Stan was raised on small, diversified Iowa farm and educated at Iowa State and Ambassador universities. He spent 10 years in England managing a college livestock and vegetable farm, returning Iowa in 1977, and founding Premier. He has traveled back to Europe every year since to visit Premier's suppliers, sheep events and friends. Potratz has also visited New Zealand and Australia sheep events and operations on several occasions. He has visited 30 countries on behalf of Premier. Stan also owns and manages Premier's farm, whose commercial flock has varied from 30 to 1,100 ewes. The current 700-head ewe flock is comprised of both hair and wool genetics. Ewes lamb indoors January through June and September through November. Lambs are sold for both slaughter (ethnic market) and breeding.

Potratz was a member of American Lamb Board for 3 years.



DALE THORNE

Chairman, American Lamb Board

Dale Thorne, a sheep producer from Michigan, is chairman of the American Lamb Board (ALB). He is serving his second 3-year term on the Board, representing the lamb feeding sector. Thorne has previously served as ALB vice chairman, treasurer and chairman of the Research Committee. Thorne and his family have a flock of 1,000 Polypay ewes, half of which lamb in the fall and half in the spring. Because he is near Detroit, which is the largest Muslim community in the US, Thorne sees first-hand the value of both traditional and nontraditional markets. The majority of the farm's lambs are marketed at about 80 pounds. The farm also produces hay for the horse market, and row crops such as corn and soybeans.



MICHAEL UETZ

Managing Principal, Midan Marketing

Michael is a Managing Principal of Midan Marketing, meat marketing specialists since 2004. One of Michael's many roles at Midan is to drive the firm's consumer-focused research platform, giving him unique insight into how the demands of today's meat consumers are shaping retail trends from digital marketing to product branding. Recent proprietary research includes a first-of-its-kind Meat Consumer Segmentation Study. Michael's long-term connection with the meat industry started on his family's ranch in North Dakota and blossomed during his time at the National Live Stock and Meat Board, where he oversaw consumer research as well as retail and foodservice marketing programs. His understanding of the complete meat channel combined with his strategic approach to market research gives meat industry clients a competitive edge.



BOB LUDWIG

Emcee

Bob Ludwig is an agribusiness consultant who has worked in virtually every sector of American agriculture. He facilitated the efforts by the American Lamb industry to develop the Lamb Industry Roadmap in 2013 and continued to work with the industry through 2015.

Speakers (cont.)



FAITH GARRARD

Category Manager, Raley's

Faith Garrard is currently a Category Manager at Raley's. In her role, she is responsible for overseeing the beef, pork, lamb and bison categories. Previously, she was an account manager at Superior Farms, working directly with major retailers and international customers. Garrard views one her most important responsibilities in the industry as being an advocate for the rapidly evolving consumer. She enjoys spending her time away from work with her husband and three-year-old son. One of her favorite activities is trying the cuisine at new restaurants.



PHIL HADLEY, PhD

International Market Development Director, Agriculture and Horticulture Development Board (UK)

Hadley is currently international market development director for the Agriculture and Horticulture Development Board, the English levy board for red meat. He joined the organization in 2004 as regional development manager for the South West. He has a master's in meat science from the University of Bristol and a doctorate in animal production from the University of Nottingham. Hadley has been awarded the honor of Fellow of the Institute of Meat for services to the sector. He leads the export team on overseas market development and links closely with UK and overseas government departments on technical solutions and negotiates approvals for the export of products from the UK. He also leads a program on international marketing.



DAVID PETHICK, PhD

Director of the Centre for Animal Production and Health, Murdoch University (Australia)

David Pethick, PhD, is professor of biochemistry and nutrition and director of the Centre for Animal Production and Health within the School of Veterinary & Life Sciences at Murdoch University in Australia. He has been described as the 'layman's professor' due to his outstanding ability to translate complex science. He grew up on the family farm in the Adelaide Hills. His doctorate studies involved research which helped explain how sheep and cattle adapt to the harsh Australian climate. A major area of work has been to understand how to improve and guarantee the consumer acceptance of beef and lamb. This includes working across the lamb and beef value chains. Specific contributions include the nutritional and stress management required to deliver high levels of muscle sugar (glycogen), intramuscular fat (marbling) and tenderness to underpin premium beef and lamb brands. His work on meat quality has led to the development of Meat Standards Australia, which is used by farmers, abattoirs, butchers and supermarkets to help deliver quality beef and lamb to consumers.





RUSTY BURGETT

Program Director, National Sheep Improvement Program

Rusty Burgett is the program director for the National Sheep Improvement Program (NSIP). He works throughout the industry to improve genetic selection techniques for productivity and industry advancement. He earned a bachelor's in animal science from The Ohio State University and a master's in animal science and ruminant nutrition from the University of Wisconsin-Madison. Burgett has managed commercial sheep operations and worked as the shepherd and farm operations manager at Iowa State University and the shepherd and assistant superintendent of the University of Wisconsin-Madison Spooner Agricultural Research Station until 2014, when he became the first staff person for NSIP.



BRENDA MURDOCH, PhD

Assistant Professor, University of Idaho

Brenda Murdoch has more than 20 years of experience in genetics, genomics and molecular biology research, including high-throughput genomics research. Her research program focuses on characterizing the relationship between genetic variation in sheep with biological traits of value. Always with this goal in mind, Murdoch uses a number of molecular and genetic tools to further improve the understanding of how genetic variations affect biological processes of both desirable complex phenotypic traits and disease incidence. At the University of Idaho, she continues her research and teaches upper level courses.



TOM BOYER

Owner, Boyer Land & Livestock

Tom Boyer, a fourth-generation livestock producer, owns and operates Boyer Land & Livestock, which includes Chalk Creek Boers and the Boyer Rambouillet flock, now known as Legacy Sheep Company. He is a retired professional farm manager, formerly managing 32,000+ acres of irrigated crop land in Utah, Idaho and Oregon. He is an accredited rural appraiser for the western US. Boyer is past president of numerous organizations, including Appraisal Foundation Board of Trustees, American Goat Federation, American Rambouillet Sheep Breeders Association, Utah Wool Growers Association, and American Society of Farm Managers and Rural Appraisers. He currently serves as co-chair of American Sheep Industry Association's Genetic Stakeholders Committee. He has served in numerous other leadership capacities in various agricultural and governmental organizations. He has been an agricultural consultant in several foreign countries with sheep, goats and farming operations, including Australia, Dominican Republic, India, Ecuador, Ukraine and Pakistan. He has also been an adjunct professor for Western Wyoming College, University of Wyoming, Utah State University, Snow College and the American Society of Farm Managers and Rural Appraisers. He is a popular speaker on agricultural issues.



Speakers (cont.)



BILL SCHULTZ

Owner, Bunker Hill Farm

Bill Shultz is a third-generation sheep producer from De Graff, Ohio. He is a graduate of The Ohio State University in animal science, where he was a member of the livestock judging team. After college, Bill worked as a fieldman for Larry Mead and the Sheep Breeder magazine, covering purebred shows and sales throughout the United States. For nearly 40 years, Shultz showed and sold his Rambouillet and Suffolk sheep from coast-to-coast as well as judging numerous sheep events nationally. He and his wife, Susan, operate Bunker Hill Farm, which features registered Suffolk breeding ewes. Shultz recognized that there was more to animal breeding than just visual appraisal, raw data and performance records as he saw other species of livestock advance their genetics with the use of Estimated Breeding Values. Their Suffolk flock has been enrolled in National Sheep Improvement Program for the past 17 years, concentrating on improving the terminal sire traits of growth and carcass quality. Rams are marketed both regionally and into the Western range areas. Shultz has been involved with the Utah Ram Sale for the past 15 years.



LAURIE JOHNSON

Instructor, Pipestone Lamb & Wool Program

Laurie Johnson has been an instructor in the Pipestone Lamb & Wool Program at Minnesota West Community and Technical College for two years. She was raised on a diversified crop and livestock operation in northeastern South Dakota. Her passion for sheep started at the age of five with two bottle lambs. She graduated from South Dakota State University with a bachelor's degree in agriculture education and a master's degree in education. Johnson was an agricultural instructor at Lake Area Technical Institute for more than five years, specializing in ranch management. Laurie and her husband, Brandon, are raising two sons on their diversified cattle and sheep operation north of Watertown, SD.



REID REDDEN, PhD

Sheep and Goat Specialist, Texas A&M AgriLife Extension

Reid Redden, PhD, serves as a state-wide sheep and goat specialist for Texas A&M AgriLife Extension. He was raised on a sheep and goat ranch in Utopia, Texas. Redden attained bachelor's, master's and doctorate animal science degrees from Texas A&M, New Mexico State and Montana State universities. In his current role, he provides educational programs on a wide range of topics, including genetic selection, livestock guardian dogs, parasite control and flock/herd health. Redden has provided leadership to various industry groups, such as the National Sheep Improvement Program, Lamb Industry Roundtable and Texas Ranchers of Tomorrow.





JAKE THORNE

Extension Associate, Texas A&M AgriLife Extension

Jake Thorne is a full-time employee of Texas A&M AgriLife Extension as an extension associate for the state sheep and goat specialist, Reid Redden, PhD. He is also pursuing a doctorate at the University of Idaho, working with Brenda Murdoch, PhD, in sheep genetics. His is currently focused on increasing the awareness and use of technology within the sheep industry, primarily the application of genetic selection technology including genomics and Estimated Breeding Values. He is particularly interested in identifying superior animals in the areas of reproduction and parasite resistance through on-farm performance testing, and investigating the genomes of these animals for novel and previously discovered markers. Thorne previously managed 1,500 sheep and goats across several west Texas properties for Texas A&M AgriLife Research. Thorne was born and raised on a sheep operation in northern California. He resides in San Angelo, Texas, with my wife, Lauren, and daughter, Charlotte. Their time together is centered on raising sheep, training stock dogs and traveling.



ALEX MOSER

Iowa lamb producer

Alex Moser and his brother, Caleb, along with their parents, Wes and Esther, run a flock of about 900 ewes near Lester, Iowa. The flock consists of mostly Polypay-type commercial ewes and is on an accelerated lambing program. Most of the ewes will lamb three times in two years. Living in the Corn Belt means that corn silage is the most economical feed available. The ewes and lambs are housed in hoop barns and dry lots most of the year. The brothers also provide custom shearing for several producers in the Midwest. Moser has represented the US in the last four sheep shearing world championships and is an instructor at several shearing schools across the country.



BRAD ANDERSON

Vice President of Procurement and Services, Mountain States Rosen

Brad Anderson has been at Mountain States Rosen for nine years. He is the vice president of procurement and services and also oversees the company's New York facility, which includes livestock supply, food safety, production and IT. Anderson previously worked for Iowa Lamb Processors, where he gained experience in sales, production management, food safety and procurement. He grew up raising sheep and continues to do so with his family today.



Speakers (cont.)



DAVID ANDERSON, PhD
Economist, Texas A&M AgriLife Extension

David Anderson is Texas A&M AgriLife Extension economist and professor in the department of agricultural economics at Texas A&M. His work involves the analysis of livestock market economics and policy. He has experience analyzing the impact of policy changes, technology adoption and alternative management strategies. Anderson has authored or co-authored more than 800 journal articles, publications, symposiums, presented papers, popular press and other articles. He has chaired or co-chaired 30 graduate student's research committees and been a member of 55 other graduate student committees. For the past 18 years he has taught Agricultural Economics 614, Ag Policy. He has received awards from the American, Western, and Southern Agricultural Economics Associations for quality of research and extension programs. Anderson is a four-time recipient of the Extension Superior Service award. He is originally from Coolidge, Arizona, where his father is a cotton farmer.



RICHARD EHRHART, PhD
Small Ruminant Specialist, Michigan State University

Richard Ehrhardt has been the small ruminant specialist at Michigan State University since 2009, holding a joint appointment between the departments of animal science and large animal clinical sciences. He received his bachelor's in animal science from UW-Madison and his graduate degrees from Cornell University. His interest in extension and applied research were fostered by a diversity of experience with sheep, including purebreds during his youth, shearing professionally since his early teens, field research in New Zealand and Australia, and managing his own flock of commercial ewes on an accelerated lambing program for the past 20 years. Ehrhardt's applied research interests revolve around increasing production efficiency in small ruminants through strategic nutritional management, optimizing aseasonal reproduction, improving whole-farm forage utilization and by establishing preventative health programs.



KEITH BELK, PhD
Head, Department of Animal Science, Colorado State University

Keith Belk recently accepted the role as Head, Department of Animal Science at Colorado State University (CSU). Previously, he served as a Professor and holder of the Ken & Myra Monfort Endowed Chair in Meat Science with the Center for Meat Safety & Quality, Department of Animal Sciences at CSU. He also served as director of the Center for Meat Safety & Quality at CSU, and as an adjunct professor in the Colorado School of Public Health. Belk earned bachelor's and master's degrees from CSU, and a doctorate from Texas A&M University. He has been employed in the private sector as a buyer by Safeway, Inc., and by the USDA Agricultural Marketing Service in Washington, DC, as an international marketing specialist. At CSU since 1995, he has authored or co-authored 240 refereed scientific journal articles, provided over 530 invited presentations, generated more than \$21 million in extramural research funding, and was the primary inventor on two patents. Belk served as the state meat extension specialist between 1995 and 2000, on the Journal of Animal Science's editorial board in 1997-2000, on the Board of Directors for the American Meat Science Association (AMSA) between 2003-2005, and as President of AMSA in 2009-2010.



ROB JENNINGS

CEO, BeefChain/American Certified Brands

Rob Jennings is a Wyoming resident and founding partner of American Certified Brands, LLC, and BeefChain. He currently serves as CEO. For more than 20 years, he lived and worked in Washington, DC, where he specialized in project management as owner of American Event Consulting, LLC. During this time, he advised multiple House and Senate campaigns and produced bi-partisan events for non-profits, conventions and presidential inaugurations. Upon returning to Wyoming, he became a founding Member of the Wyoming Blockchain Coalition. The mission of American Certified Brands' BeefChain is to create a new "rancher-centric" supply chain utilizing blockchain technology to recapture the value now realized by third-party feedlots and processors.



LESA EIDMAN

Director of Producer Resources and Sustainability, Superior Farms

Lesla Eidman is the director of producer resources and sustainability for Superior Farms, a nationwide employee-owned company based in Sacramento. Founded in 1964, Superior Farms is North America's largest and most sustainable processor and marketer of lamb. Eidman focuses her work directly with the producer partners that supply lambs to Superior Farms by developing programs that increase production and consistency through financial programs, camera grading, genetic research and producer education. Previously, she was the executive director for the California Wool Growers Association and the California Pork Producers Association. She led the associations' educational workshops, marketing programs and policy engagement in the regulatory process. Lesa earned a bachelor's in agricultural business from California State University, Fresno and a master's in agricultural and resource economics from the University of California, Davis. Lesa's late grandfather always told people that her first word was "lamb" and her first steps were taken in the lambing barn. She was raised in a family whose heart and financial investment have always been in agriculture, whether it be production, education or sales. She resides in Sacramento.



HENRY ZERBY, PhD

VP of Protein Procurement and Innovation, Wendy's Quality Supply Chain Co-op, Inc.

Henry Zerby joined Wendy's Quality Supply Chain Co-op, Inc. (QSCC) in 2016. His team is responsible for the supply chain development and acquisition of all animal protein products on the Wendy's menu (beef, chicken, bacon, sausage, eggs and cheese). He also serves as a member of Wendy's Animal Welfare Council. Prior to joining QSCC, Zerby served on the faculty at The Ohio State University for 17 years. His research focused on enhancing the efficiency of food animal production while simultaneously improving the inherent qualities of the resulting meat products. He previously served as consultant to Wendy's Quality Assurance team from 2005 through 20016. In that role, Zerby provided technical expertise related to meat products, performed third-party animal welfare, product quality, and food safety audits in harvest and further processing facilities for all animal protein products in the Wendy's system. Zerby obtained his master's and doctorate in meat science from Colorado State University and his bachelor's in dairy and animal science with minors in poultry technology and management and international agriculture from Penn State University.

Speakers (cont.)



FRANCIS POTTER

Special Projects Manager, Mountain States Rosen

Francis Potter graduated from Oklahoma State University with a bachelor's degree in Animal Science and Natural Resources, majoring in agricultural business with an international option. He is currently the Special Projects Manager at Mountain States Rosen with a primary main focus is operational development. The company has implemented new procedures with the leadership of Potter which have resulted in improved overall red meat yields, efficiency and quality.



GUSTAVO FERNANDEZ

General Manager, Denver, Superior Farms

Gustavo Fernandez joined Superior Farms in February 1994. He has held several positions at the company, from fabricating lambs and managing departments, to his current position as General Manager of the Denver facility. He oversees all daily operations of the Denver facility and enjoys working with the employees. His experience in different positions has helped him to understand how the entire system and its people work together to get the job completed. He has learned what the ideal lamb looks and takes pride in delivering it to Superior's customers. In his current position, Gustavo oversees the daily operations of the Denver facility and enjoys working with the employees. Outside of work, he like watching baseball and spending time with family.



CODY HEIMKE

Program Manager, Niman Ranch

Cody Hiemke has been the Niman Ranch program manager for 14 years. He also runs a 50-ewe flock of National Sheep Improvement Program-recorded Shropshires in south-central Wisconsin. Hiemke has a bachelor's and master's in meat and animal sciences from the University of Wisconsin. His master's degree research focused on carcass improvement with ultrasound technology. He has previously worked for Equity Livestock Sales and at the US Sheep Experiment Station in DuBois, Idaho, the summer prior to starting at Niman Ranch. Hiemke serves on the National Sheep Improvement Program board of directors, and previously on the boards of the American Lamb Board, National Sheep Industry Improvement Center, California Wool Growers and Wisconsin Sheep Breeders Cooperative.





BRIAN PHELAN

Director of Procurement, Superior Farms

Brian Phelan is Director of Procurement for Superior Farms. He started in the sheep industry in 1986 as a lamb buyer for Swift Independent in San Angelo, Texas. In 1995, he joined Superior Farms. Brian remained in San Angelo as a lamb buyer until 1998. He then transferred to Dixon, California, to take the position of Director of Procurement. Phelan manages Superior Farms’ day to day harvest needs. He also supervises the lamb inventory at various feedlots and pasture operations throughout the western US.



JESSICA PRENNI, PhD

Associate Professor, Colorado State University

Jessica Prenni, PhD, received her doctorate in analytical chemistry from the University of Colorado, Boulder, followed by post-doctoral training at the Scripps Research Institute in La Jolla, California. She has more than 17 years of experience in biological mass spectrometry and served for over ten years at the director of the Proteomics and Metabolomics Core Facility at Colorado State University (CSU). During this time, her group developed novel approaches in metabolomics for analytical methods and data analysis including the RAMClustR algorithm for metabolite clustering and annotation. Presently, Prenni is an associate professor in the Department of Horticulture at CSU where the overall theme of her research is the application of mass spectrometry to address important issues in food/crop safety and quality.



DALE WOERNER, PhD

Cargill Endowed Professor in Sustainable Meat Science, Texas Tech University

Dale Woerner, PhD, earned his bachelor’s and master’s degrees in animal science, meat and food industry management from Texas Tech University in 2003 and 2005, respectively, and earned his doctorate in animal science/meat science from Colorado State University in 2009. He served on the faculty at Colorado State University for nine years, and recently joined the faculty at Texas Tech University as the Cargill Endowed Professor in Sustainable Meat Science. Woerner serves as a member of the National Cattlemen’s Beef Association’s Beef Innovations Group and is a member of the American Meat Science Association Board of Directors. In 2013, Dale was selected by Vance Publishing as a “40 Under 40” honoree as a young leader in the agricultural industry contributing to the 2050 challenge of feeding 9 billion people by 2050. Woerner was named one of the Top 10 Industry Leaders for 2014 by Cattle Business, was recognized in 2014 by Texas Tech as a Horizon Award recipient, in 2015 American Meat Science Association Achievement Award, 2018 American Society of Animal Sciences Early Career Achievement Award, 2018 TTU College of Agricultural Sciences and Natural Resources Distinguished Alumni. Also, in 2018, Woerner was selected by the American Meat Science Association membership to be the chairman of the Reciprocal Meat Conference, and, most recently, he was awarded the North American Meat Institute’s 2018 Harry L. Rudnick Educator’s Award. His research and teaching program are focused on meat quality, meat flavor chemistry, carcass value optimization, product shelf life and packaging, production efficiency and meat nutrition.



Speakers (cont.)



REBECCA MILLER

Editor-in-Chief, Farm and Dairy

Rebecca Miller recently accepted the position of Editor-in-Chief of Farm and Dairy newspaper. She runs Blue Heron Farms, in Lisbon, Ohio, in partnership with her mother, Cynthia Koonce. They have approximately 350 commercial maternal cross ewes on 150 acres in the Appalachian foothills, lambing several times a year. Lambs are grown out on site and sold at a premium for niche and ethnic markets in the region and the Northeast. Rebecca grew up on the farm and spent more than a decade pursuing journalism domestically, and overseas in East Africa. She returned to run the farm in 2016. In 2018, Miller was selected to represent young U.S. sheep producers at the LambEx convention held in Perth, Australia. She traveled to Washington, D.C., in 2018 to represent the American Sheep Industry. Miller is a director of the Ohio Sheep and Wool Program, a member of the American Sheep Industry Young Entrepreneurs Executive Committee, and a member of the Ohio Department of Agriculture Small Ruminant Advisory Committee.



RYAN MAHONEY

Manager, R Emigh Livestock

Ryan Mahoney manages his family's ranch, R Emigh Livestock. The family raises cattle and sheep in the Montezuma Hills around Rio Vista, California, background calves and lambs on irrigated pasture and operate a lamb feedlot. The ranch was settled in 1877 by Ryan's great-great-grandfather, Jerome Emigh. Richard 'Dick' Emigh, Ryan's grandfather, grew the ranch into its current operation. Mahoney always worked summers and school holidays on the farm. After graduating from Saint Mary's College with a degree in religious studies, he took a full-time position in the company as an assistant manager in the feedlot operation. He worked his way up and became president in 2011. Mahoney has been involved in his community serving as Solano County Farm Bureau President 2013-2017 and currently serves on the North Delta Water Agency, Solano County Water Agency, Solano County Groundwater Sustainability Agency, and the Main Prairie Water District board. Follow Mahoney on Instagram @CaliforniaSheepRancher.



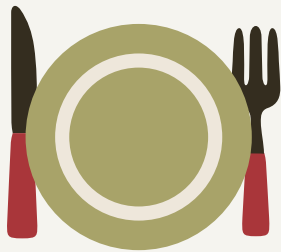
DAVID FISHER

Sheep producer and rancher

David Fisher earned his bachelor's in horticulture from Texas Tech University. Prior to returning to the family ranch in 2010, he owned and operated a landscape design and install business in San Antonio. David and his family live in West Central Texas, where he owns a multi-species ranching operation. He runs 450 fine-wool ewes, 250 meat goats and 100 Angus cows on a fenced range system. He also manages a family partnership ranching operation with his mom, dad and sister. Fisher is a director with the Texas Sheep and Goat Raisers Association, Chairman of the Texas Ranchers of Tomorrow and an American Sheep Industry Association Wool Council member.

US Lamb Industry Roadmap

KEY ACCOMPLISHMENTS



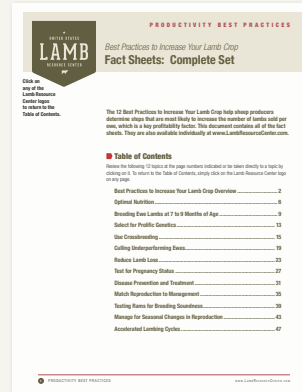
PRODUCT CHARACTERISTICS

- Flavor Research Phase I & II completed
- Flavor Research Phase III (REIMS) underway
- Cost of Fat Study nearing completion



PRODUCTIVITY IMPROVEMENT

- Lamb Crop Best Practices series
- Seasonality of the US Lamb Industry white paper released



INDUSTRY COLLABORATION

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US LAMB INDUSTRY | *Sales and Insights*



Consumer Insights

As consumers seek interesting, authentic, adventurous flavors, interest in American Lamb is on the rise.

2018 US CONSUMER RESEARCH INSIGHTS

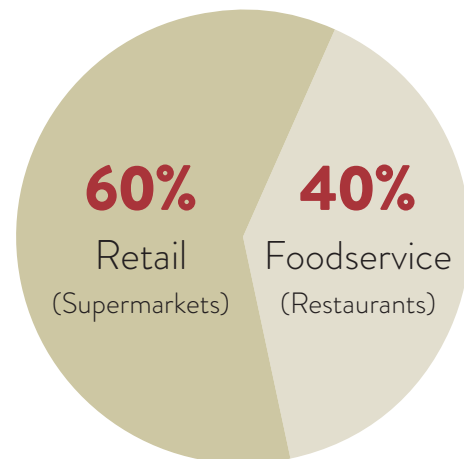
- The most-liked attributes of lamb are *flavor, unique taste and tenderness*.
- Price and lack of availability are the top barriers to purchasing more lamb.
- **68%** of respondents indicated a *preference for lamb* from the US, up from **40%** in **2011**.
- About **50%** of consumers have never tried lamb.
- Consumer intimidation about lamb is declining.
 - Only **15%** of respondents indicated they felt lamb was too difficult to prepare, down from **45%** in **2011**.
- *Consumer interest* and *enjoyment* in lamb is growing.
 - **43%** of respondents indicated 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**.
 - The positives of lamb outweigh the negatives for the majority of respondents.



Lamb Sales

Approximately **300 million pounds of lamb** are sold each year in the US, with lamb imports from Australia and New Zealand now representing more than half the total lamb supplies.

AMERICAN LAMB SALES BY CHANNEL



MILLENNIALS ARE EMBRACING LAMB AND DRIVING GROWTH IN THE CATEGORY.



MINORITY POPULATIONS ACCOUNT FOR MORE THAN 50% OF TOTAL US LAMB CONSUMPTION.



Foodservice

- **62%** of all fine dining restaurants feature lamb. In fact, lamb is among the top seven entrée proteins on fine dining menus, according to Datassential MenuTrends™. Lamb continues to be synonymous with upscale dining and offers an alternative to more common proteins.
- Merguez, a spicy North African sausage traditionally made with lamb, is one of the **fastest growing proteins** on fine dining menus, up **38%** in 2017 compared to 2016.
- Diners continue to show interest in where their food comes from. When origin of lamb is mentioned on fine dining menus, **domestic lamb** is mentioned more than **3:1** over imported lamb.
- **Lamb menuing is up 14%** in the last ten years (Datassential MenuTrends™). The study notes that lamb menu penetration has shown growth while many other commonly menued proteins have shown declines.
- As in retail, ground lamb sales are on the rise in foodservice. This is illustrated by the **growth in lamb burgers** – which are found on more and more menus – up **275%** in 2018 compared to 2008.



Export Sales

The US currently exports **8,428 metric tons** of lamb per year, **valued at \$18,316,00**. The top US lamb markets include:

- **Mexico** – **6,571 metric tons** or **\$7.5 million**
- **Caribbean** – **679 metric tons** or **\$4.4 million**
- **Canada** – **396 metric tons** or **\$1.1 million**
- **Middle East** – **248 metric tons** or **\$1.1 million**



Retail

- The **highest retail sales** of lamb are in the Northeast, Southeast and California (accounting for **70%** of total sales).
- **Leg, shoulder and loin** are the **top selling** lamb cuts at retail.
- As more and more consumers look for lamb and want affordable and easy to prepare cuts, **ground lamb sales continue to grow**; now representing **10%** of total lamb sales and pounds sold at retail.
- The average lamb-purchasing household spends over **30%** more per year on food than the average household.

THIS INFORMATION IS BROUGHT TO YOU BY YOUR LAMB CHECKOFF.

The American Lamb Board (ALB) is an industry-funded national research, promotion and information checkoff program that works on behalf of all American lamb producers, feeders, seedstock producers and processors to build demand for American Lamb.

SOURCES:

2018 US Consumer Market Research Study
IRI Fresh Meat and Lamb Review, ending 10/7/18
Datassential MenuTrends™



American Lamb Board

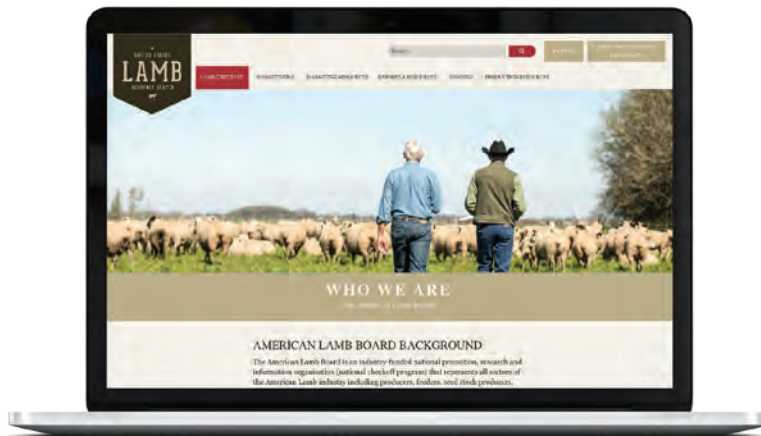
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LAMB CHECKOFF
YOUR VOICE TO CONSUMERS

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KEEPING ALL SEGMENTS OF THE LAMB INDUSTRY INFORMED ABOUT LAMB CHECKOFF PROGRAMS IS ONE OF THE AMERICAN LAMB BOARD'S MOST IMPORTANT TASKS. HERE ARE THREE EASY WAYS TO KEEP CURRENT.



LAMB RESOURCE CENTER WEBSITE

www.LambResourceCenter.com

This website brings together information from major national industry organizations. Checkoff information such as Lamb Board annual reports, research updates and promotion resources are housed here.

Information and educational resources for lamb suppliers and marketers is available at an online password-protected section. To request a password, send an email to info@americanlamb.com using the subject "LRC password request."



LAMB CHECKOFF FACEBOOK PAGE

www.Facebook.com/LambCheckoff

Posts are added frequently to share information on programs, opportunities and actions by the Lamb Board. By liking and following the page, Facebook users will see the information when it is posted. Sharing the posts is encouraged.




INDUSTRY E-NEWSLETTER

Be sure to sign up for an email from the Lamb Board to receive current updates directly in your inbox. Subscribe at www.LambResourceCenter.com or send an email to info@americanlamb.com using the subject "industry e-news subscribe."



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About the American Lamb Board

The American Lamb Board is an industry-funded national promotion, research and information organization (national checkoff program) that represents all sectors of the American Lamb industry including producers, feeders, seedstock producers and processors. The 13-member board, appointed by the Secretary of Agriculture, is focused on increasing demand by promoting the freshness, flavor, nutritional benefits and culinary versatility of American Lamb. The work of the American Lamb Board is overseen by the U.S. Department of Agriculture and the board's programs are supported and implemented by the staff in Denver, Colorado.



American Lamb Board

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