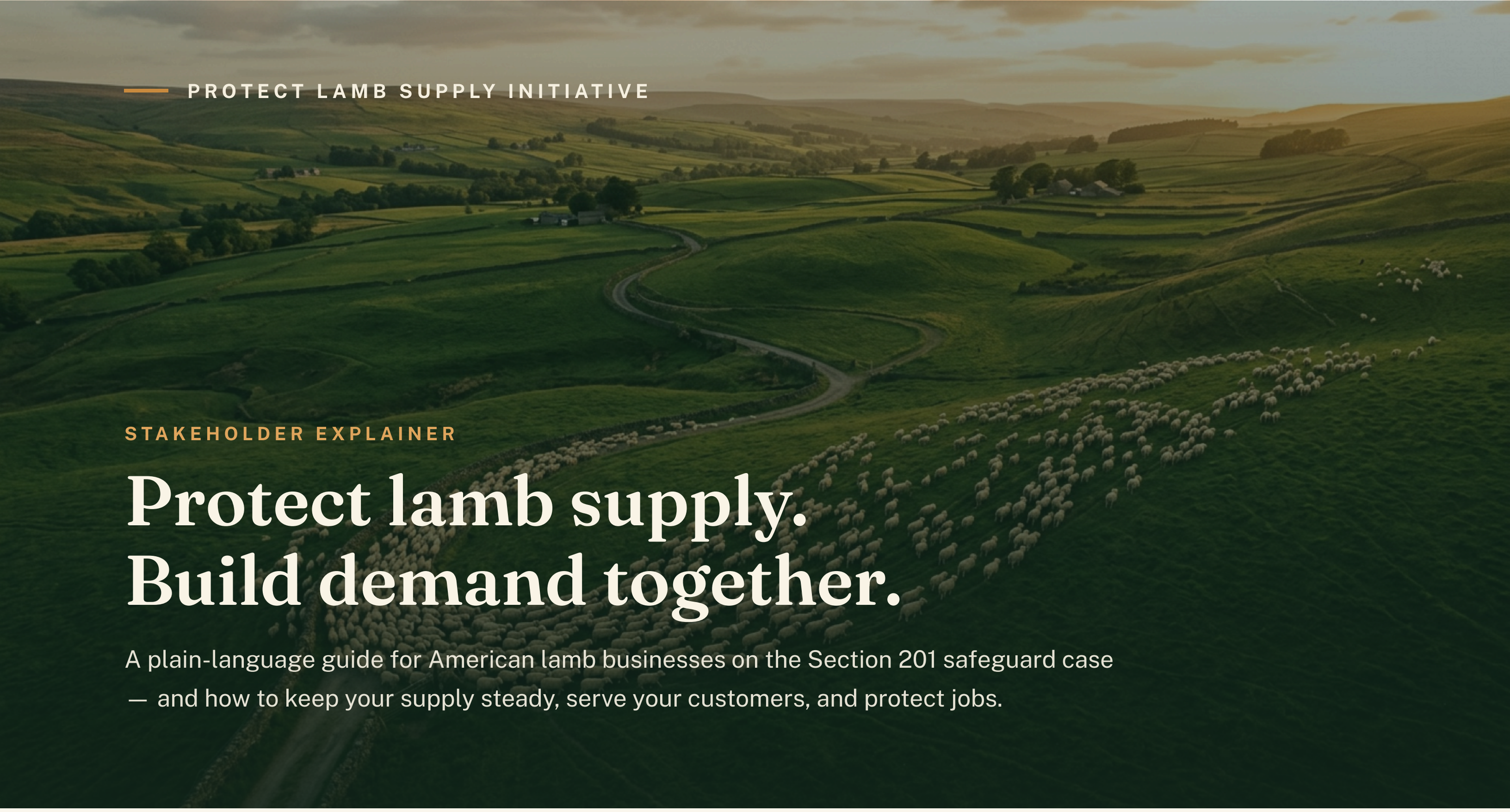

PROTECT LAMB SUPPLY INITIATIVE

STAKEHOLDER EXPLAINER

Protect lamb supply. Build demand together.

A plain-language guide for American lamb businesses on the Section 201 safeguard case — and how to keep your supply steady, serve your customers, and protect jobs.

THE SHORT VERSION

The first formal step toward a trade case that could restrict reliable access to lamb has been taken in Washington. Because imports supply most of the lamb Americans buy, any restrictions on imported lamb would likely mean Americans eat **less lamb overall,** because it would be harder to source, more expensive and less competitive against other proteins.

The U.S. International Trade Commission (ITC) will weigh the evidence, determine whether imports are causing serious injury or threat of serious injury to U.S. producers, and — only if it makes that affirmative finding — recommend a remedy. The president makes the final decision. Businesses in the lamb supply chain hold the evidence the ITC needs.

YOU CAN DO FOUR THINGS NOW

01
Understand
Know what's happening and what it means for you.

02
Join and stay updated
Sign up for updates — protectlambsupply.org

03
Start gathering your records
Be ready with strong evidence when questionnaires arrive.

04
Respond when questionnaires open
ITC questionnaires open July 30, 2026 — allow 20–40 hours.

The goal is straightforward: keep lamb on shelves and menus, hold prices steady, protect jobs, and grow the market for everyone — American producers included. **Stable supply, affordable lamb, strong jobs.**

3/4

Roughly **three-quarters of 2025 U.S. lamb supply was imported.** Domestic production cannot replace that volume in the near term; imports fill the gap that keeps lamb on American shelves and menus.

1 · THE SITUATION

What is happening

Some U.S. sheep producers argue that imported lamb has surged and injured American producers, and they have asked the federal government for relief that could restrict imports. In July 2026, the Office of the U.S. Trade Representative (USTR) asked the U.S. International Trade Commission (ITC) to open a Section 201 safeguard investigation into imported lamb.

The investigation covers fresh, chilled, or frozen lamb meat. Live lambs and sheep, and meat from mature sheep (mutton), are outside its scope.

Once the Commission institutes the investigation and opens its evidence-gathering, **the windows to respond will be short** — and **all foreign producers and U.S. producers** of lamb meat, as well as **all U.S. importers** and **U.S. purchasers**, should **complete the relevant questionnaires**, whether you receive them directly from the ITC or not.

THE TERMS YOU'LL HEAR

The ITC

The U.S. International Trade Commission — the independent federal agency that investigates whether imports are seriously injuring a domestic industry. It gathers evidence, makes a decision, and recommends a remedy to the President. The President makes the final call on whether and how to act.

Section 201

The safeguard law under the Trade Act of 1974. Unlike an antidumping or anti-subsidy case, it requires no finding of unfair trade activity by anyone. It asks only whether imports have increased so much to be a substantial cause of serious injury, or threat of serious injury, to a U.S. industry.

A safeguard remedy

Usually tariffs, quotas, or tariff-rate quotas (a set volume allowed in at a lower duty, with a higher duty above it), typically for four years and extendable to eight. The ITC recommends a remedy only if it finds serious injury or threat of serious injury. The President makes the final call on whether and how to act.

If your business depends on a reliable lamb supply, **your information can help shape what the ITC sees.**

Why this affects your business

U.S. producers are already selling into a strong market, with no quick way to add the animals, processing capacity, cuts, specifications, and year-round reliability that buyers need.

So import restrictions would not simply move buyers from imported lamb to American lamb. In many cases they would mean **less lamb consumption overall.** When lamb gets scarce or expensive, customers don't wait — they move to chicken, beef, pork, or another protein option on the menu or the shelf. Retailers give the space to a more reliable protein, restaurants scale back lamb features, and shoppers buy lamb less often. Demand falls — which ultimately hurts domestic producers too, not just importers.

Everyone who buys, sells, processes, or serves lamb has a direct stake in whether lamb stays reliably available, and affordable. **That's your supply, your customers, your margins, and your workers' jobs.**

3 · THE BIGGER PICTURE

Supply, structure, and the chance to grow the market

THE U.S. SHEEP FLOCK, IN DECLINE FOR DECADES

~56M	→	~5M
head · 1940s		head · record low today

According to Steiner Consulting industry analysis, the decline is **structural** — the collapse of wool economics, a small and fragmented producer base, labor and scale constraints, and competition from cheaper proteins.

On that reading, imports supplied lamb the domestic industry could not, keeping the category stocked while U.S. production stayed limited. Domestic and imported supply are **complementary** — American producers sell what they can raise; imports fill the rest of a market that would otherwise run short. A previous lamb safeguard in 1999 did not materially reverse the flock's long-term decline, because import limits don't change wool returns, scale, labor, or processing capacity.

The bigger prize is growth. Americans eat only about **1.5 pounds of lamb per person annually** — far less than chicken or beef. A stable supply and steady, growing demand make the whole category stronger — for American producers, importers, processors, retailers, restaurants, and shoppers alike. That's the outcome this initiative works toward: **stable supply, steady prices, strong jobs.**

And it's where **your voice carries weight**. You can speak with authority about supply, availability, price, customer behavior, specifications, and **what will happen to your business** if import restrictions reduce your access to lamb.

4 · YOUR ROLE

How you can help: the pathway

You don’t need to be a trade lawyer or a lobbyist to take part.

01

Step 1 — Understand

You know what the case is, why it matters to your business, and why this is about protecting supply and growing the market.

02

Step 2 — Join and stay updated

Sign up so you hear the moment the ITC questionnaires open and get updates in plain language. Signing up adds you to the update list and connects you with the initiative. → protectlambsupply.org

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03

Step 3 — Gather your records and prepare your evidence

Before the questionnaires issue, get your records in order (see the checklist in Section 5). A clear, honest account of how your business depends on lamb supply — and what a restriction would do to it — is powerful evidence.

04

Step 4 — Respond when the questionnaires open

When ITC questionnaires become available on July 30, 2026, please respond. **The ITC estimates 20–40 hours per response, so preparation matters.** Businesses that aren’t contacted directly can still download the relevant questionnaire from the ITC’s website and respond. **This questionnaire is the main method the ITC uses to collect the data that will be the basis of its decision.** Since responses contain commercially sensitive information, they receive **confidential treatment** under an Administrative Protective Order under ITC rules.

What the questionnaires will ask

The ITC gathers evidence through detailed questionnaires that are specific to the role your business plays in the supply chain. **There are four separate questionnaires for U.S. producers, U.S. importers, U.S. purchasers, and foreign exporters.** Expect questions in four areas:

Your import and shipment numbers

- Imports, shipments, and inventories by country of origin — Australia, New Zealand, Canada, Mexico, and others — for every year from 2021 through mid-2026.
- U.S. shipments broken out by channel (distributors, breakers and packers, retail, foodservice) and by cut — leg, shoulder, loin, rack, shank, ground, trim.
- The tables must reconcile: inventories plus imports minus shipments have to tie out, line by line.

Pricing, quarter by quarter

- Quarterly prices and volumes from 2021 through mid-2026 for six benchmark products — fresh and frozen frenched racks, square-cut shoulders, and semi-boneless legs.
- How you sell: contract versus spot mix, contract terms, discount policies, and lead times from order to delivery.
- Sales-journal-level detail around shipment pricing, net of discounts and rebates.

Sourcing and purchasing decisions

- Where you source lamb and how those shares have shifted since 2021 — and, country by country, whether you bought imports instead of domestic product and whether price was the primary reason.
- Supply constraints: any supplier that refused orders, put you on allocation, shorted deliveries, or missed commitments since 2021.
- What drives your purchases — availability, reliability, quality, delivery, price, and attributes like grass-fed, halal, kosher, and organic.

The market — and the safeguard question

- Whether U.S. and imported lamb are interchangeable for you and your customers, and how they compare on some twenty factors, from availability to flavor.
- Demand trends, substitute proteins, and whether the 2025 tariff actions have already affected the lamb market.
- What any restrictive measures on lamb availability (such as tariffs or quotas) do to your purchases, pricing, customers, and staffing.

Some businesses will complete more than one questionnaire — firms that break or package lamb also receive the producer version, and purchasers who import directly are asked to complete the importer version. **Responses are treated as confidential business information under ITC rules**: not published in a way that reveals your firm's operations, and releasable only under administrative protective order to authorized counsel.

RECORDS TO START GATHERING NOW

01 Import and purchase volumes and values by country of origin, from January 1, 2021

02 Quarterly prices and volumes for your main cuts

03 Year-end inventories, and shipments by channel and by cut

04 Supplier and customer lists — you'll be asked to name your largest, with contacts

05 Contract terms, discount policies, and lead times

06 Certification documentation — halal, kosher, grass-fed, organic, humane

07 Orders already placed for delivery into 2027

08 Examples of supply constraints, shortages, or specification gaps

Responses are certified and subject to ITC audit — keep the worksheets you use to prepare them. You don't need every record in hand to begin.

6 · THE TIMELINE

What happens next

Once the ITC issues its questionnaires, the response window is expected to be short — likely measured in weeks. The practical sequence, subject to the Commission's official schedule:

01

ITC investigation begins — July 13, 2026

USTR referred the matter on July 13 and the ITC has instituted the investigation.

02

Open Questionnaire period — July 30, 2026 to August 25, 2026

All firms can and should submit a response. Questionnaires will be issued on July 30, 2026 and responses will be accepted until August 25, 2026.

03

Injury Hearing — October 16, 2026

The ITC holds hearings where eligible interested parties can give evidence in person. The ITC injury hearing will take place on October 16, 2026.

04

ITC determination — by November 13, 2026

The Commission weighs the record and, if it finds serious injury or threat of serious injury, recommends a remedy to the President.

05

Remedy Hearings — December 2026 to January 2027

Parties will have the opportunity to address remedy in separate hearings before both the ITC (tentatively set for December 1, 2026) and before the U.S. Trade Representative (likely in January 2027).

06

Report submitted to the President — by January 11, 2027

The ITC will submit its report to the President by January 11, 2027. After additional input from parties, USTR, and other agencies, the President can accept the ITC's recommended remedy, choose a different remedy, or take no action.

Preparing early means a stronger contribution when ITC questionnaires become available.

7 · WHO WE ARE

Protect Lamb Supply

Protect Lamb Supply is an initiative bringing together American businesses and supply-chain partners — importers, processors, distributors, food-service operators, and retailers — working to protect a stable lamb supply and grow demand for the category.

The initiative is supported by industry partners including the Australian Meat Industry Council (AMIC) and Meat & Livestock Australia (MLA). Participation does not imply legal membership in a formal entity.

8 · TAKE PART

Three ways to act today

Join and stay updated

protectlambsupply.org

Sign up and we'll send plain-language updates as the process moves.

Prepare your evidence

Start with the checklist in Section 5.

General inquiries

contact@protectlambsupply.org

Media inquiries

media@protectlambsupply.org

PROTECT LAMB SUPPLY. BUILD DEMAND TOGETHER.

Once the process moves, the response windows will be short. **Join now to stay updated, and start gathering your records today** so you're ready when the questionnaires arrive.
→ protectlambsupply.org