

North America Poultry Meat - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2025 - 2030)

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Report description:

The North America Poultry Meat Market size is estimated at 64.36 billion USD in 2025, and is expected to reach 67.9 billion USD by 2030, growing at a CAGR of 1.07% during the forecast period (2025-2030).

The growing popularity of online channels, coupled with rising demand for leaner meats, is boosting the market

- The changing dietary patterns and consumers preferring leaner meats resulted in higher demand for poultry meat through both on-trade and off-trade channels. Poultry meat sales within the on-trade channel increased by 23.42% from 2022 to 2017. Frozen meat holds a substantial share of 49.67% by value of the on-trade poultry meat market. It is projected to rise due to the increased convenience and a greater shelf-life. The presence of chicken in virtual restaurants has also increased in the past few years, with a major focus on products such as chicken wings or fried chicken.
- The online channel in North America is projected to be the fastest-growing distribution channel, and it is expected to register a CAGR of 5.34% during the forecast period. Online grocery stores are continuously investing in increasing supply chain networks and contactless delivery and payments. Major manufacturers and retailers have also added online modes of sales by understanding the huge potential. Manufacturers provide interactive cooking demonstrations on their e-commerce sites and offer a variety of branded product giveaways to attract more customers. Manufacturers and other online channels provide free cookbooks with attractive dishes and methods to draw the interest of cooking enthusiasts.
- Supermarket sales are also booming with the wide range of specialty products offered, such as organic, no-antibiotic, and locally grown. Supermarkets held the major share in off-trade channels with 67.69% by value in 2022. Supermarkets in the region are observing a strong growth in demand for products such as pre-marinated, pre-cut, or pre-seasoned meat, especially from the millennials due to the convenience.

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Poultry consumption in the region grew amid the rising prices

- The United States holds a major share of the poultry market in the region. The poultry market in the country grew by 28.64% from 2017 to 2022. The rise in poultry meat consumption during the period was majorly due to the increased consumer acceptance of poultry as a substitute for other meat types, which have a higher fat content.
- In 2022, according to the US Bureau of Labour Statistics, chicken had the highest price inflation among meat product categories in the July Consumer Price Index, increasing by an unadjusted 17.6% Y-o-Y and 1.4% M-o-M, as opposed to increases of 7.2% and 0.4%, respectively, for the overall meat category. Gains of 15.9% Y-o-Y and 1.9% M-o-M for fresh whole chicken and 18.6% Y-o-Y and 1.1% M-o-M for fresh and frozen chicken parts were recorded in the chicken category. The millennial population in the US purchased 20% more chicken than the typical American home. They are over-indexed when buying dark chicken meat and under-indexed when buying beef and other types of meat.
- Canada is anticipated to be the fastest-growing country in terms of poultry consumption. It is projected to register a CAGR of 1.35% during the forecast period, majorly due to its increasing production and ecological factors. In comparison to the global average for poultry production, Canadian chickens have one of the lowest carbon footprints in the world. Processed poultry observed substantial growth in the country owing to enhanced mouthfeel and convenience. Poultry-based burgers, sausages, breaded chicken fillets, mortadella, pate, chicken wings in sauce, chicken drumsticks with seasoning, turkey with breadcrumb coating, and others are the popular processed poultry products in the country.

North America Poultry Meat Market Trends

Growing demand from domestic and foreign markets is expected to boost regional production

- In 2021, the United States was the largest producer of poultry in the region, followed by Mexico and Canada, with shares of 83.31%, 8.15% and 6.4%, respectively. Poultry production in the US is forecasted to be 1% higher in 2023 to 21.3 million tons. In 2022, the US poultry industry was the world's largest producer and second-largest exporter of poultry meat. Poultry production in the US mostly expanded from 2013 to 2022 to meet domestic and foreign consumer demand. In 2021, 9.13 billion broilers were produced in the United States, a 1% dip from 2020. From this, a total of 59.2 billion pounds of live-weight broilers were produced in 2021, a minor dip from 2020.
- Turkey's meat production in the United States during January-September 2022 was 3.91 billion pounds, 7% down from the same period in 2021. However, a decline in turkey production was outweighed by increases in broiler production. Poultry production in the US has a competitive advantage due to abundant domestic feed resources, primarily soybean meal, and corn as feed, which is generally the most significant production cost across livestock. In 2021, poultry farmers in Canada produced 1.5 billion kilograms of chicken, turkey, and stewing hens, an increase of 1.4% compared with the previous year. Poultry farmers produced 1.3 billion kilograms of chicken in 2021, which accounted for 89.9% of total poultry production in Canada.
- In 2021, turkey production declined 5.0% to 150.4 million kilograms compared with 2020. Poultry farming is the most prevalent livestock industry in Mexico. In 2021, poultry represented more than 60% of Mexico's livestock production. It generated 0.89% of Mexico's overall GDP in 2019. The poultry farming industry provided 28.1% of Mexico's agricultural GDP and 36.6% of its livestock GDP.

Rising feed prices are influencing the market

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- The FAO Meat Price Index states that chicken meat reached its highest price in June 2022 since 1990. According to the Food and Agricultural Organization (FAO), the Poultry Meat Index counts 130,39 points, which is 28.9% more than in June 2021. The number was also 4.5% above 124.74 points during June 2022, which is against the trend of the general FAO Food Price Index, which dropped slightly from 157.9 points in May to 154.2 points in June 2022.
- Another factor driving the price of chicken is the cost of poultry feed. Compared to previous years, the cost of corn and soybeans has been quite high, thus boosting the price of chicken once it reaches a restaurant or grocery store. The price of conventional soybeans reached a seven-year high in 2021 to USD 33 per bushel in September. At the same time, during 2021-2022, average corn prices increased by 21% Y-o-Y to USD 5.45 per bushel.
- The spread of the highly virulent avian influenza, also known as bird flu, across the United States in 2022 has compelled farmers to annihilate close to 280 backyard and commercial flocks in 32 states since January 2022. This factor resulted in a decrease in supply and a price increase, with consumers paying about 5% more for entire chickens than they did a year ago, which is only a relative value given that supermarket prices have risen 10%. Similarly, prices for whole-hen frozen turkey in the first quarter were reported at USD 1.31 per pound, up 19% from 2021. Prices for all types of meat rose across the globe, with poultry prices rising sharply to an all-time high. The price rise was majorly due to the continuous tight global supply conditions impacted by the war in Ukraine and bird flu outbreaks in the northern hemisphere.

North America Poultry Meat Industry Overview

The North America Poultry Meat Market is moderately consolidated, with the top five companies occupying 56.60%. The major players in this market are Cargill Inc., Hormel Foods Corporation, JBS SA, Sysco Corporation and Tyson Foods Inc. (sorted alphabetically).

Additional Benefits:

- The market estimate (ME) sheet in Excel format
- 3 months of analyst support

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