

United States Processed Meat - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2025 - 2030)

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Report description:

The United States Processed Meat Market size is estimated at 10.7 billion USD in 2025, and is expected to reach 12.08 billion USD by 2030, growing at a CAGR of 2.46% during the forecast period (2025-2030).

Affordability and product innovations are boosting the market

- Processed meat has been growing steadily and is expected to register a CAGR of 2.36% by value from 2023 to 2029. Factors such as affordability, convenience, wide availability, and acceptable taste boost market sales. The processed meat industry is experiencing constant innovation and multiple iterations of the same product. The ongoing trend in the processed category is clean-label and all-natural products. Low-sodium, low-fat, low-calorie, no MSG, and free from additives and preservatives are some popular claims on labels in the processed meat product category.
- The most consumed processed meat type is processed pork, which grew by 28.38% by value from 2017 to 2022. Although some communities or regions do not eat pig, it is one of the most popular processed meats in the United States. Lunch meats, hot dogs, bacon, sausage, smoked ham, and other processed pork make up the category of processed pork. Among the various ethnicities in the country, processed pork is popular among the African-American and Hispanic communities.
- The fastest-growing segment of processed meat is the beef category, which is projected to record a CAGR of 3.51% by value during the forecast period. Minced beef, beef patties, sausages, etc., are the country's primarily sold processed beef items. However, in recent times, the market has seen a growing popularity of marinated beef portions, especially steak cuts. With the marinated meats, consumers have found themselves cooking home-style, and the opportunity has allowed them to try unique flavors and complicated recipes. Sweet Bourbon Marinated, Steakhouse Marinated, Teriyaki Marinated, etc., are some of the popular marinated options in the market.

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United States Processed Meat Market Trends

Increased domestic production and rising exports from Asian countries is driving the market growth

- Meat producers in the United States are technology-driven, which helps in strategically supplementing forage-based diets to fulfill animal requirements for protein, vitamins, or minerals. The US is one of the largest beef producers in the entire world, with a share of nearly 30% in 2022. The country produced 12.89 million metric tons of beef in 2022, up 0.15 million metric tons from 2021. The top beef-producing states in the US are Ohio, Texas, Oklahoma, and Missouri. Ohio is ranked among the top beef-producing states throughout the nation and had around 2.9 million cattle slaughtered in 2022. Ohio's beef production also increased by 2% in 2022 compared to 2021.
- The US primarily produces high-quality, grain-fed beef. Beef farms and ranches represent over 30% of US farms. The US beef industry is divided into two sectors, namely cow-calf operations and cattle feeding. The focus of the cow-calf operation is to maintain a herd of beef cattle to raise calves. The cattle feeding sector focuses on preparing cattle for various means of production. Beef cattle are raised in all the states of the United States. As of January 2023, there were around 28.9 million beef cattle in the United States, down 4% from last year.
- Beef production in the US is anticipated to grow in the coming years due to the growing demand for American beef from Asia. In 2021, for the first time in the last five years, the United States sent more edible meat to China than Australia, and it currently leads in important export markets like Japan and South Korea. The US frozen beef exports to Asia grew, registering a CAGR of 9.90% by value from 2017 to 2022. The US struggled with ongoing supply chain issues, transportation problems, and ample supplies of domestic products, especially on its West Coast.

Rise in feed cost and lower production of cattle lead to a rise in prices

- The price of beef witnessed a 40% growth from 2017 to 2022. Rising retail demand boosted the need for the wholesale demand for beef. The supply fell as slaughterhouses were shut, and overall slaughter declined, leading to higher beef prices. Therefore, there was a higher focus on fresh/chilled and frozen beef. However, livestock producers earned low prices for their animals despite the high price of meat. The number of cattle and calves at the end of 2022 was around 89.3 million, which was a decline of 3% from the previous year. Cattle prices are expected to receive support from packer demand due to the relatively stable demand for beef and limited supplies of steers and heifers in feedlots.
- In the United States, beef prices were predicted to rise by 15% from 2022 to 2023 and stay high until 2025. This projection is influenced by a severe drought that affected most of the cattle trade this summer and prompted many producers to sell their herds early for slaughter, which will impact the herd size for 2023. In November 2022, 59.3% of the lower 48 states and 49.59% of the US were in a drought, impacting feed production by raising the cost of feed. Feed expenses are the largest operating cost for cow-calf producers, comprising 75% of the operational costs.
- Intervention from authorities may be required in the future to stabilize beef prices and create a supply balance. Companies must increase their production in meat plants to higher volumes, provided the USDA relaxes certain regulatory requirements as it has done in the past. For instance, in April 2020, the USDA's Food Safety Inspection Service temporarily permitted beef processing

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plants to accelerate processing speeds to supplement the US meat supply as demand increased.

United States Processed Meat Industry Overview

The United States Processed Meat Market is fairly consolidated, with the top five companies occupying 79.67%. The major players in this market are Hormel Foods Corporation, Marfrig Global Foods S.A., Sysco Corporation, Tyson Foods Inc. and WH Group Limited (sorted alphabetically).

Additional Benefits:

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

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