

## **Organic Meat - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2025 - 2030)**

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### **Report description:**

Organic Meat Market Analysis

The organic meat market reached USD 21.87 billion in 2025 and is projected to grow to USD 32.06 billion by 2030, registering a strong 7.94% CAGR during the forecast period. This growth is driven by increasing health awareness, the expansion of high-income urban populations, and the enforcement of stricter organic certification standards. These factors are pushing consumers toward premium protein options that offer cleaner ingredient profiles and adhere to verifiable animal welfare practices. The adoption of technology-enabled traceability solutions, such as blockchain pilots by leading processors, is enabling brands to maintain price premiums in a fragmented yet highly dynamic market. Additionally, investors are actively funding capacity expansion projects in North America and Asia-Pacific, where demand continues to surpass supply. In the European Union, policy measures are incentivizing producers to convert more agricultural land to organic farming, further supporting market growth.

Global Organic Meat Market Trends and Insights

Health benefits drive consumer preference for organic meat products

As consumer health consciousness continues to rise, organic meat has solidified its position as a preferred protein source, recognized for being free from synthetic hormones, antibiotics, and chemical residues. The Organic Trade Association underscores that US organic farmers adhere to rigorous standards, including raising livestock without antibiotics or synthetic growth hormones, providing 100% organic feed, and ensuring clean, cage-free living environments. These practices not only emphasize animal

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welfare but also align with the growing demand for transparency and sustainability in food production. Millennials and Gen Z consumers, in particular, are driving this demand, demonstrating a willingness to pay premium prices for products they perceive as healthier and ethically sourced. The appeal of organic meat is further reinforced by scientific studies linking its consumption to a reduced risk of chronic diseases, such as cardiovascular conditions and certain cancers. This evidence strengthens consumer trust and creates a self-reinforcing cycle where health-conscious buyers propel market growth while validating premium pricing strategies.

#### Environmental sustainability increases demand for organic livestock production

Environmental considerations have transitioned from being niche concerns to becoming significant drivers of purchasing decisions. Organic meat production offers distinct sustainability advantages over conventional methods. According to The Organic Center, organic meat practices actively support biodiversity by eliminating the use of harmful synthetic pesticides and fostering diversified habitats. Managed grazing, a key component of organic farming, enhances soil quality and reduces dependency on synthetic fertilizers, contributing to long-term agricultural sustainability. The EU's Organic Action Plan, which aims to convert 25% of agricultural land to organic farming by 2030, reflects a strong policy-level endorsement of organic farming's environmental benefits. This regulatory push is expected to create favorable conditions for market expansion. Furthermore, corporate sustainability commitments are driving demand, as foodservice operators and retailers increasingly prioritize organic meat to meet environmental, social, and governance (ESG) targets while aligning with evolving consumer expectations. For climate-conscious consumers, purchasing organic meat is more than a dietary choice-it is viewed as a form of environmental activism.

#### High cost of organic meat limiting its accessibility to consumers across different income levels

Price sensitivity remains the most significant barrier to the adoption of organic meat, as retail prices for organic options are considerably higher than conventional alternatives. This pricing disparity limits market penetration across various income groups. Economic pressures, particularly during inflationary periods, further exacerbate this issue. Consumers often prioritize essential spending, leading many to opt for cheaper protein sources despite a preference for organic products. The USDA's Organic Situation Report 2025 highlights a decline in price premiums for organic products, driven by increasing competition and the rise of alternative labels such as regenerative agriculture. This trend suggests that producers may need to compress margins to make organic meat more accessible to a broader audience. On the production side, high cost structures present additional challenges. Expenses related to organic feed premiums and certification processes limit producers' ability to lower prices without compromising profitability. These structural cost constraints create a significant impediment to achieving mass-market adoption of organic meat, underscoring the need for strategic interventions to balance affordability and profitability in the organic meat market.

Other drivers and restraints analyzed in the detailed report include:

Animal welfare awareness accelerates organic meat market growth / Premium positioning of organic meat products attracts quality-focused consumers / Short shelf life of organic meat product due to the absence of preservatives hinders growth /

For complete list of drivers and restraints, kindly check the Table Of Contents.

#### Segment Analysis

Poultry takes the lead with a commanding 48.66% market share in 2024, underscoring a consumer shift towards affordable organic proteins. This trend is bolstered by a well-established supply chain ensuring consistent retail availability. Technological strides and regulatory updates have propelled organic poultry production. Notably, the USDA's revamped Organic Livestock and

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Poultry Standards now emphasize space and environmental enrichment, echoing consumer demands for heightened animal welfare. While beef carves out a notable market presence with premium strategies, pork grapples with cultural dietary hurdles in burgeoning markets. Yet, pork's edge lies in processing innovations that set it apart.

Segments like lamb and mutton are on an upward trajectory, boasting a forecasted 12.39% CAGR through 2030. This surge is largely attributed to cultural preferences in the burgeoning Middle Eastern and South Asian markets, where organic certification fetches a premium. As urbanization and disposable incomes rise, so does the appetite for premium proteins, especially in regions where lamb is culturally revered. The segment enjoys a competitive edge due to limited supply challenges and robust export networks linking organic producers to lucrative global markets. Meanwhile, other organic meats, such as game and specialty proteins, carve out their niche. They leverage artisanal branding and direct-to-consumer sales, sidestepping traditional retail hurdles. Across the board, advancements in organic feed production and pasture management are slashing production costs, bolstering margins, all while upholding organic integrity standards.

Fresh and chilled organic meat products dominate the market with a 61.72% market share in 2024, driven by consumer preferences for superior quality and culinary flexibility, which justify premium pricing strategies. This dominance aligns with evolving retail trends, where experiential shopping and home meal preparation have gained traction, particularly following pandemic-induced lifestyle shifts. Consumers increasingly seek high-quality ingredients for home cooking, reinforcing the demand for fresh products. Retail partnerships further highlight this trend, with Verde Farms significantly expanding its fresh organic beef offerings across major supermarket chains such as Target, Publix, and Albertsons, achieving notable distribution growth through a premium fresh positioning strategy. Fresh products benefit from shorter supply chains, which help reduce transportation costs and maintain product integrity, enabling competitive pricing compared to frozen alternatives.

Frozen organic meat products are witnessing robust growth, with a projected CAGR of 10.37% through 2030. This growth is fueled by rising demand for convenience and advancements in technology that preserve nutritional value while extending shelf life. Frozen products also facilitate geographic market expansion, overcoming the distribution limitations faced by fresh products. This is particularly advantageous for smaller organic producers aiming to access national markets. Additionally, frozen organic meats appeal to cost-conscious consumers by offering organic benefits at more affordable price points, as they typically carry lower premiums than fresh alternatives. Advanced packaging technologies, such as vacuum sealing and modified atmosphere packaging, are enhancing the quality of frozen products, minimizing freezer burn, and preserving organic integrity over extended storage periods, thereby strengthening consumer trust and driving market adoption.

The Organic Meat Market Report is Segmented by Type (Poultry, Beef, Pork, and More); by Product Form (Fresh/Chilled and Frozen); by Packaging Type (Vacuum-Pack, Trays, Cartons, and Others); by Distribution Channel (Off-Trade and On-Trade); and by Geography (North America, Europe, Asia-Pacific, Middle East and Africa, and South America). The Market Forecasts are Provided in Terms of Value (USD).

#### Geography Analysis

In 2024, North America holds a leading 39.23% market share, driven by its well-established organic infrastructure and evolving regulatory frameworks, which have been strengthened since the inception of the USDA's National Organic Program. The region's competitive advantage is rooted in its comprehensive certification systems and recent regulatory advancements. The USDA has significantly increased funding for the National Organic Program and introduced new Organic Livestock and Poultry Standards, effective January 2024, as highlighted by the National Organic Coalition. Canada plays a pivotal role in this growth, with expanding livestock operations and leveraging NAFTA provisions to enhance cross-border organic meat distribution. The region's direct-to-consumer channels have matured beyond the pandemic-induced surge, with e-commerce platforms enabling rural producers to access urban premium markets while maintaining organic integrity throughout the supply chain.

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Asia-Pacific is positioned as the fastest-growing region, with a projected 10.14% CAGR through 2030. This growth is fueled by rapid economic development and a cultural shift toward premium protein consumption in urban areas. India's organic food sector showcases immense potential, with metropolitan cities such as Mumbai, Pune, and Delhi leading in organic food searches, while non-metropolitan areas are also witnessing accelerated adoption. Investments in poultry infrastructure across the region are facilitating the integration of organic meat within South Asia and Southeast Asia. This growth is underpinned by a focus on local production to enhance food security. Additionally, cultural dietary preferences and traditional medicinal beliefs that emphasize food as medicine align naturally with the positioning of organic meat, enabling acceptance of premium pricing across diverse income segments.

Europe maintains a strong market presence, supported by the EU's ambitious Organic Action Plan, which aims to increase organic farming to 25% of agricultural land by 2030, up from the current 8.5%. The introduction of new EU organic regulations in January 2025 will impose stricter compliance requirements, presenting challenges for smaller producers but enhancing overall market integrity and consumer confidence. The region benefits from harmonized certification standards across member states, which facilitate cross-border trade and create economies of scale in organic meat production and distribution. Meanwhile, the Middle East and Africa are emerging as growth regions, driven by cultural preferences for lamb and mutton. South America, on the other hand, leverages its established livestock production capabilities and expanding export networks to meet the growing demand for traceable organic protein in developed markets.

List of Companies Covered in this Report:

Tyson Foods Inc. / JBS S.A. / Woolworths Group Limited / Perdue Farms Inc. / Meyer Natural Foods LLC / Scandi standard AB / Foster Poultry Farms, LLC / Verde Farms, LLC / Eversfield Organic Ltd / Les Viandes du Breton Inc. / Cleaver's Organic (Hewitt Foods) / Farmer Focus / Hormel Foods Corporation (Applegate) / OBE Organics Australia / Swillington Organic Farm / Valens Farms / Corpp Cooperative / Bell & Evans / Waitrose Limited / Yorkshire Valley Farms /

Additional Benefits:

<ul> The market estimate (ME) sheet in Excel format /  
3 months of analyst support / </ul>

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