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Global Frozen Beef and Chicken Market Growth 2026-2032

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Abstracts

The global Frozen Beef and Chicken market size is predicted to grow from US$ 125715 million in 2025 to US$ 161188 million in 2032; it is expected to grow at a CAGR of 3.2% from 2026 to 2032.

Frozen Beef and Chicken Meat refers to beef and chicken that have undergone primary meat-processing procedures—including slaughtering, dressing, cutting, deboning, trimming and portioning—and are subsequently brought into a frozen state through industrial freezing processes such as air-blast freezing, tunnel freezing, plate or contact freezing, block freezing and individually quick frozen (IQF) processing. Major commercial forms include frozen beef carcasses and quarters, bone-in and boneless beef cuts, primal and subprimal cuts, beef trimmings, as well as frozen whole chickens, breasts, thighs, drumsticks, legs, wings and other standardized chicken cuts. Products may be supplied in block-frozen, individually frozen, vacuum-packed, bagged or carton-packed formats depending on downstream customer specifications and logistics requirements.

According to our research, the global Frozen Beef and Chicken Meat industry is a large, mature animal-protein market whose competitive barriers extend well beyond the freezing process itself. Commercial success depends on the integration of livestock or poultry sourcing, large-scale slaughtering, standardized cutting and deboning, freezing, food-safety management, cold-chain logistics, sanitary market access and the ability to supply customers consistently across different geographies and product specifications. The two proteins have structurally different economic profiles. Chicken benefits from shorter production cycles, relatively efficient feed conversion, broad religious acceptability and greater affordability, supporting relatively stable demand growth in emerging markets, foodservice and industrial processing. Beef has a substantially

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longer biological production cycle and higher unit value, making supply more sensitive to cattle inventories, slaughter availability and producer economics; consequently, revenue growth can be driven more heavily by pricing during periods of constrained supply. USDA's April 2026 outlook forecast global beef production to decline by approximately 1% to 61.6 million tonnes, while shifts in Chinese import access, tighter supplies in several major producing regions and continued U.S. import demand are reshaping global beef flows. This supports the view that the stronger nominal expansion seen around 2026 should be interpreted partly as a cyclical pricing effect rather than as a permanent increase in underlying consumption growth.

From a supply perspective, frozen beef and frozen chicken exhibit materially different competitive structures. International beef supply is relatively concentrated around large-scale slaughtering and export platforms in the United States, Brazil, Australia, New Zealand, Argentina and selected European markets, where access to cattle, processing scale, deboning yields, export approvals and global cold-chain infrastructure create substantial competitive advantages. Frozen chicken is considerably more geographically diversified: the United States, Brazil, Europe, Thailand, China, South Korea, India and the Middle East all support meaningful domestic production clusters, resulting in a longer tail of regional and mid-sized suppliers.

From a demand and product-development perspective, the next phase of industry growth is unlikely to be driven by a fundamental technological disruption in freezing itself. Instead, growth is expected to come from wider cold-chain penetration, continued standardization of restaurant and quick-service procurement, expansion of industrial food processing, greater cross-border meat availability and rising animal-protein consumption in developing economies. Technologies such as IQF, automated cutting and deboning, machine-vision grading, vacuum packaging, digital traceability and automated cold storage can improve yield, consistency, labor productivity and inventory management, but they reinforce rather than redefine the industry's mature operating model. Competitive differentiation is therefore shifting from basic slaughter capacity toward a broader capability set that includes reliable raw-material sourcing, optimized cut mix, food safety, traceability, sanitary certification, market-access flexibility and efficient cold-chain distribution. Animal disease remains one of the most important non-commercial variables. WOAH notes that highly pathogenic avian influenza H5N1 has continued to cause recurring outbreaks in poultry and wild-bird populations worldwide since 2021, with control measures often involving large-scale culling. In 2026, WOAH also revised trade-related standards and introduced strengthened biosecurity guidance. For frozen chicken producers, geographic diversification, compartmentalization or regionalization strategies, disease surveillance and access to multiple export markets

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are therefore becoming increasingly important components of supply-chain resilience rather than purely regulatory compliance activities.

Report Scope

LP Information, Inc. (LPI) ' newest research report, the “Frozen Beef and Chicken Industry Forecast” looks at past sales and reviews total world Frozen Beef and Chicken sales in 2025, providing a comprehensive analysis by region and market sector of projected Frozen Beef and Chicken sales for 2026 through 2032. With Frozen Beef and Chicken sales broken down by region, market sector and sub-sector, this report provides a detailed analysis in US$ millions of the world Frozen Beef and Chicken industry.

This Insight Report provides a comprehensive analysis of the global Frozen Beef and Chicken landscape and highlights key trends related to product segmentation, company formation, revenue, and market share, latest development, and M&A activity. This report also analyzes the strategies of leading global companies with a focus on Frozen Beef and Chicken portfolios and capabilities, market entry strategies, market positions, and geographic footprints, to better understand these firms’ unique position in an accelerating global Frozen Beef and Chicken market.

This Insight Report evaluates the key market trends, drivers, and affecting factors shaping the global outlook for Frozen Beef and Chicken and breaks down the forecast by Type, by Application, geography, and market size to highlight emerging pockets of opportunity. With a transparent methodology based on hundreds of bottom-up qualitative and quantitative market inputs, this study forecast offers a highly nuanced view of the current state and future trajectory in the global Frozen Beef and Chicken.

This report presents a comprehensive overview, market shares, and growth opportunities of Frozen Beef and Chicken market by product type, application, key manufacturers and key regions and countries.

Market Segmentation

Segmentation by Type:

Frozen Beef

Frozen Chicken Meat

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Segmentation by Product Form:

Whole Carcass/Whole Bird Products

Bone-in Cuts & Portions

Boneless Cuts & Portions

Segmentation by Application:

Retail & Consumer

Foodservice & Institutional Catering

Industrial Further Processing

This report also splits the market by region:

Americas

United States

Canada

Mexico

Brazil

APAC

China

Japan

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- Korea
- Southeast Asia
- India
- Australia

Europe

- Germany
- France
- UK
- Italy
- Russia

Middle East & Africa

- Egypt
- South Africa
- Israel
- Turkey
- GCC Countries

The below companies that are profiled have been selected based on inputs gathered from primary experts and analysing the company's coverage, product portfolio, its market penetration.

- Tyson Foods

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Cargill

Perdue Farms

Koch Foods

Mountaire Farms

House of Raeford Farms

Peco Foods

Case Farms

Sofina Foods

Exceldor Cooperative

George's Inc.

Foster Farms

Harrison Poultry

Caviness Beef Packers

STX Beef

FPL Food

American Foods Group

Central Valley Meat Holding Company

JBS N.V.

ABP Food Group

Vion Food Group

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Danish Crown

Dawn Meats

Kepak Group

LDC

PHW Group

2 Sisters Food Group

Plukon Food Group

MHP

Cedrob

Wipasz

Chongqing Hengdu Agricultural Group

Fujian Sunner Development

Shandong Xiantan

Jiangsu Lihua Food Group

Qingdao Jiulian Group

Jiangsu Yike Food Group

Spring Snow Food Group

Harim

MANIKER

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Olpum

DaChan Great Wall Group

Dong Hao Frozen Foods

Li Feng Industrial

Charoen Pokphand Foods

GFPT

Betagro

Saha Farms

Malayan Flour Mills

Venky's

Sneha Group

Almarai

Tanmiah Food

Al Watania Poultry

A'Saffa Foods

Marfrig Global Foods (MBRF)

Minerva Foods

Frigol

Copacol

ArreBeef

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Silver Fern Farms

ANZCO Foods

Kilcoy Global Foods

Thomas Foods International

Astral Foods

Aurora Coop

C.Vale

Lar Cooperativa Agroindustrial

S?o Salvador Alimentos

Masterboi

Frisa Frigor?fico Rio Doce

Frigor?fico Concepci?n

Frigor?fico Las Piedras

Bindaree Food Group

Key Questions Addressed in this Report

What is the 10-year outlook for the global Frozen Beef and Chicken market?

What factors are driving Frozen Beef and Chicken market growth, globally and by region?

Which technologies are poised for the fastest growth by market and region?

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How do Frozen Beef and Chicken market opportunities vary by end market size?

How does Frozen Beef and Chicken break out by Type, by Application?

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