

# **Chilled and Frozen Meat Market Forecasts to 2030 – Global Analysis By Meat Type (Beef, Pork, Poultry and Other Meat Types), Storage Form (Chilled Meat and Frozen Meat), Processing Type, Packaging Type, Distribution Channel and By Geography**

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## **Abstracts**

According to Statistics MRC, the Global Chilled and Frozen Meat Market is growing at a CAGR of 4.8% during the forecast period. Meat products that are refrigerated or frozen to prolong their shelf life and preserve their freshness are referred to as chilled and frozen meat. While frozen meat is kept at temperatures below -18°C, chilled meat is kept at slightly above freezing, usually between 0°C and 4°C. Both techniques preserve meat quality and stop bacterial growth and spoiling, which makes them appropriate for long-term storage and transportation.

According to the Government of La Rioja from Mexico, chilled red meat represented 87.3% of red meat sales, followed by frozen at 12.4% and shelf-stable at 0.3% in 2021.

Market Dynamics:

Driver:

Changing consumer lifestyles

The shift in consumer lifestyles, marked by busier schedules and increased urbanization, has led to a growing demand for convenient food options like chilled and frozen meat. These products offer longer shelf life, ease of storage, and quick preparation, catering to the needs of working professionals and families. Additionally, globalization and e-commerce have made diverse frozen meat products more

accessible, further fueling market growth. This trend is expected to sustain as consumers increasingly prioritize convenience in their dietary choices.

#### Restraint:

##### Health concerns

Rising health consciousness among consumers poses a significant challenge to the chilled and frozen meat market. Concerns about high fat content, sodium levels, and the potential presence of preservatives in frozen meat products deter health-focused buyers. Additionally, the growing preference for plant-based diets and organic food alternatives further limits market expansion. These factors compel manufacturers to innovate healthier options to retain consumer trust and market share.

#### Opportunity:

##### Developing new and innovative products

The development of innovative products presents a promising opportunity for market growth. Advancements in freezing techniques, such as Individual Quick Freezing (IQF), improve the quality and nutritional retention of frozen meats. Manufacturers are also diversifying their offerings with healthier options like organic or low-fat frozen meats to cater to evolving consumer preferences. These innovations not only enhance product appeal but also expand the potential customer base.

#### Threat:

##### Food safety concerns

Food safety issues are serious because poor handling, storage, and transportation practices can cause contamination and spoiling. Problems such as bacterial development (e.g., Salmonella, E. coli), inadequate temperature management, and defects in packaging can affect the quality and safety of meat, posing health concerns to consumers. Meat producers are being forced to invest in improved preservation methods, traceability systems, and adherence to strict safety regulations as a result of increased regulatory scrutiny brought on by growing awareness of foodborne illnesses.

#### Covid-19 Impact:

The Covid-19 pandemic had both positive and negative effects on the chilled and frozen meat market. While disruptions in supply chains initially hampered production and distribution, the lockdowns increased consumer reliance on frozen foods for their long shelf life and convenience. Demand surged as people stocked up on essentials during uncertainties. However, economic slowdowns and reduced purchasing power in some regions posed challenges to sustained growth.

The poultry segment is expected to be the largest during the forecast period

The poultry segment is expected to account for the largest market share during the forecast period due to its affordability, widespread consumption, and versatility in various cuisines. Poultry products also align with health-conscious trends as they are perceived as leaner protein sources compared to red meats. The increasing availability of pre-marinated or ready-to-cook poultry options further drives its popularity among busy consumers seeking quick meal solutions.

The frozen meat segment is expected to have the highest CAGR during the forecast period

Over the forecast period, the frozen meat segment is predicted to witness the highest growth rate due to advancements in freezing technologies that preserve texture and nutritional content effectively. The rising demand for ready-to-cook meals among urban populations also contributes significantly. Moreover, innovations like vacuum-sealed packaging enhance shelf life while maintaining quality, making frozen meat a preferred choice for convenience-driven consumers.

Region with largest share:

During the forecast period, the Asia Pacific region is expected to hold the largest market share due to its growing population, rising disposable incomes, and expanding middle class. The region's increasing adoption of Western dietary habits further boosts demand for chilled and frozen meat products. Additionally, advancements in cold chain logistics ensure better distribution networks across countries like China and India, which are investing heavily in infrastructure to meet growing demand. The region's vibrant retail sector and e-commerce platforms also play a crucial role in boosting accessibility to these products.

Region with highest CAGR:

Over the forecast period, the Asia Pacific region is anticipated to exhibit the highest CAGR owing to rapid urbanization and a surge in quick-service restaurants (QSRs). The region's focus on improving refrigeration infrastructure supports market expansion, making chilled and frozen meat products more accessible to consumers. Furthermore, increasing awareness about food safety standards enhances consumer confidence in these products, further driving market growth. Growing health consciousness, along with higher demand for convenient and ready-to-eat meals, continues to foster market potential, particularly in emerging economies like India and Southeast Asia.

### Key players in the market

Some of the key players in Chilled and Frozen Meat Market include JBS S.A., Tyson Foods Inc., Cargill Incorporated, Marfrig Global Foods, BRF S.A., Kerry Group Plc, Hormel Foods Corporation, Smithfield Foods Inc., Pilgrim's Pride Corporation, Verde Farms LLC, Associated British Foods Plc, National Beef Packing Company LLC, Arcadian Organic & Natural Meat Co., VH Group, American Foods Group LLC, Koch Foods Inc., Keystone Foods and Allanasons Private Limited.

### Key Developments:

In December 2024, Smithfield has signed an agreement with VisionAg, LLC, an affiliate of HD3 Farms, one of the largest wean-to-finish and finishing growers in the U.S., to supply hogs to the company as an independent pork producer. Under the terms of the agreement, Smithfield and VisionAg will form a new company called VisionAg Hog Production, LLC, with Smithfield owning a minority interest. VisionAg Hog Production will assume ownership of 28,000 sows currently owned by Smithfield, as well as the market hogs they produce, and is expected to have the capacity to produce 600,000 hogs annually for Smithfield's fresh pork operations.

In July 2024, Tyson Foods, Inc. has entered into an agreement to sell its Vienna, Georgia poultry complex to House of Raeford Farms, the company announced. Tyson Foods' decision to sell the complex is part of its continued efforts to optimize its plant network, and the company will continue to service customer orders from other production locations.

In June 2024, Huon is preparing to invest \$110 million to expand its existing freshwater Atlantic salmon nursery, building a new Recirculating Aquaculture System (RAS) at its Whale Point site in Port Huon. The Whale Point expansion will allow Huon to continue growing fish longer on land, which means fish that go to sea will be larger and spend

less time in the marine environment.

#### Meat Types Covered:

Beef

Pork

Poultry

Lamb

Game Meat

Exotic Meat

#### Storage Forms Covered:

Chilled Meat

Frozen Meat

#### Processing Types Covered:

Raw Meat

Processed Meat

#### Packaging Types Covered:

Vacuum Packaging

Modified Atmosphere Packaging (MAP)

Controlled Atmosphere Packaging (CAP)

Traditional Packaging

Advanced Packaging Solutions

Distribution Channels Covered:

Retail

Food Service

Food Processing

Regions Covered:

North America

US

Canada

Mexico

Europe

Germany

UK

Italy

France

Spain

Rest of Europe

Asia Pacific

Japan

China

India

Australia

New Zealand

South Korea

Rest of Asia Pacific

South America

Argentina

Brazil

Chile

Rest of South America

Middle East & Africa

Saudi Arabia

UAE

Qatar

South Africa

Rest of Middle East & Africa

What our report offers:

*Chilled and Frozen Meat Market Forecasts to 2030 – Global Analysis By Meat Type (Beef, Pork, Poultry and Other...*

- Market share assessments for the regional and country-level segments
- Strategic recommendations for the new entrants
- Covers Market data for the years 2022, 2023, 2024, 2026, and 2030
- Market Trends (Drivers, Constraints, Opportunities, Threats, Challenges, Investment Opportunities, and recommendations)
- Strategic recommendations in key business segments based on the market estimations
- Competitive landscaping mapping the key common trends
- Company profiling with detailed strategies, financials, and recent developments
- Supply chain trends mapping the latest technological advancements

#### Free Customization Offerings:

All the customers of this report will be entitled to receive one of the following free customization options:

##### Company Profiling

Comprehensive profiling of additional market players (up to 3)

SWOT Analysis of key players (up to 3)

##### Regional Segmentation

Market estimations, Forecasts and CAGR of any prominent country as per the client's interest (Note: Depends on feasibility check)

##### Competitive Benchmarking

Benchmarking of key players based on product portfolio, geographical presence, and strategic alliances

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