

Sector Trend Analysis

Meat Trends in USA

August 2022

Executive summary

Of the major meat suppliers to the US by value, Canada was ranked as the largest (valued at US\$4,360.3 million in 2021 and accounted for 32.5% of the market share in USA in 2021. Canada increased at a compound annual growth rate (CAGR) of 11.9% from 2017 to 2021.

In 2021, the top three Canada meat products exported to the US were frozen meat of swine at US\$1,880.4 million, fresh/chilled meat of swine at US\$818.5 million and fresh or chilled bovine cuts at US\$364.8 million. Fresh or chilled bovine cuts recorded the highest CAGR of 32.3% from 2017 to 2021.

In terms of export volume by province, Alberta exported 306.5 thousand tonnes of meat to the USA in 2021, followed by Ontario at 261.8 thousand tonnes and Quebec at 210.2 thousand tonnes.

The top three meat products that Alberta exported to the US in 2021 were: fresh or chilled bovine meat at US\$1,482.1 million; fresh or chilled bovine cuts at US\$312.1 million; and frozen edible bovine offal at US\$86.8 million. Fresh or chilled bovine cuts had the biggest growth at a CAGR of 39.6% from 2017 to 2021.

The total volume of sales of meat in the US reached 21,220.2 thousand tonnes in 2021. Poultry accounted for the largest volume of meat sold in USA in 2021 at 10,314 thousand tonnes (almost 50% of the total meat sales), followed by beef and veal at 7,149.6 thousand tonnes and pork at 3,525.0 thousand tonnes. Beef and veal had the highest CAGR of 2.3%.

The retail sales value of the US meat sector increased from US\$85,218.9 million in 2016 to US\$89,919.3 million in 2021, registering a CAGR of 1.1%.

Contents

Executive summary.....	1
USA's meat production	2
USA's trade summary	2
Canada's meat export to the US by provinces.....	5
Consumption and spending	9
New Product Launch Analysis.....	11
Examples of new products.....	13
For more information.....	15
Resources.....	15

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USA's meat production

For the market year 2022, USA meat production (beef and veal, pork and chicken) totaled 45,618 thousand tonnes, with beef and veal accounting for 12,724 thousand tonnes, chicken for 20,568 thousand tonnes and pork for 12,326 thousand tonnes. All of their production saw moderate growth from 2017 to 2022

USA's meat production in thousand tonnes, market year: 2017-2022

Commodity	2017	2018	2019	2020	2021	2022	*CAGR % 2017-2022
Beef and Veal	11,943	12,256	12,385	12,389	12,734	12,724	1.3
Chicken	18,938	19,361	19,941	20,255	20,391	20,568	1.7
Swine	11,611	11,943	12,543	12,845	12,560	12,326	1.2
Total	42,492	43,560	44,869	45,489	45,685	45,618	1.4

Source: USDA (United States Department of Agriculture) 2021 *CAGR: Compound Annual Growth Rate

Chickens and pigs are the USA's primary livestock, producing 9.2 billion and 77.3 million heads respectively in 2020. Only sheep experienced declining CAGR of 0.5% from 2016 to 2020. Pigs in particular, experienced the largest increase in CAGR (2.0%) as volume of livestock production increased from 71.3 million heads in 2016 to 77.3 million heads in 2020.

Livestock production in the US - Historic volume (measured) by head

Livestock (head)	2016	2017	2018	2019	2020	*CAGR % 2017-2022
Chickens	8,776,700,000	8,913,800,000	175,772,000	9,038,300,000	9,222,100,000	1.2
Pigs	71,345,400	73,144,900	75,070,200	78,227,600	77,312,000	2.0
Horses	10,261,593	10,404,177	10,436,104	10,481,944	10,527,653	0.6
Ducks	7,478,000	7,548,000	7,584,000	7,656,000	7,689,000	0.7
Sheep	5,295,000	5,270,000	5,265,000	5,230,000	5,200,000	-0.5
Goats	2,615,000	2,627,000	2,639,000	2,622,000	2,655,000	0.4

Source: FAOSTAT Agricultural Production, 2022

The US trade summary

Of the major meat suppliers to USA by value, Canada was ranked as the largest (valued at US\$4,360.3 million in 2021) and accounted for 32.5% of the market share in US in 2021. Canada increased at a CAGR of 11.9% from 2017 to 2021. Due to the strong demand for meat, all of the top 10 countries exporting meat to US had a steady CAGR from 2017 to 2021, ranging from 31.3% (Brazil) to as low as 2.8% (Australia).

Top 10 meat suppliers to US in US\$ million, 2017 to 2021 (HS02, HS1601, 1602)

Country	2017	2018	2019	2020	2021	*CAGR % 2017-2021	Market share % in 2021
World	9,052.5	9,411.2	9,836.5	10,543.4	13,401.1	10.3	100.0
Canada	2,776.9	2,853.1	3,024.7	3,124.4	4,360.3	11.9	32.5
Australia	2,126.2	2,134.7	2,425.2	2,373.0	2,373.6	2.8	17.7
Mexico	1,166.2	1,239.1	1,418.8	1,620.6	2,160.7	16.7	16.1
New Zealand	1,218.1	1,318.4	1,071.2	1249.7	1,432.2	4.1	10.7
Brazil	294.8	304.7	356.7	456.4	874.9	31.3	6.5
Nicaragua	213.2	244.7	304.7	327.0	385.8	16.0	2.9
Chile	160.1	185.4	171.6	206.0	326.1	19.5	2.4
Uruguay	246.5	244.2	267.5	316.8	314.9	6.3	2.3
Italy	123.3	141.1	147.1	142.5	202.7	13.2	1.5
Denmark	153.9	152.6	111.4	135.4	190.2	5.4	1.4

Source: Global Trade Tracker, 2022 *CAGR: Compound Annual Growth Rate

Of the major meat suppliers to US by volume, Canada ranked as the largest in 2021, exporting 803.3 thousand tonnes and accounting for 38.2% of the of the market share in USA. Canada increased at a CAGR of 3.3% from 2017 to 2021. Among the top 10 suppliers, Brazil reached the highest CAGR of 29.5% from 2017 to 2021.

Top 10 meat suppliers to USA in thousand tonnes, 2017 to 2021 (HS02, HS1601,1602)

Country	2017	2018	2019	2020	2021	*CAGR % 2017-2021	Market share % in 2021
World	1,852.7	1,833.7	1,810.9	1,899.8	2,102.8	3.2	100.0
Canada	706.5	676.2	672.0	665.0	803.3	3.3	38.2
Mexico	247.4	229.4	259.4	298.6	327.6	7.3	15.6
Australia	334.3	332.5	353.5	340.1	282.8	-4.1	13.4
New Zealand	222.4	225.5	165.7	201.6	207.5	-1.7	9.9
Brazil	42.7	43.8	49.9	69.3	120.2	29.5	5.7
Chile	43.9	51.9	51.9	60.3	70.1	12.4	3.3
Nicaragua	46.1	54.4	63.6	65.8	68.0	10.2	3.2
Uruguay	41.8	40.1	40.9	48.9	45.6	2.2	2.2
Denmark	33.9	38.5	27.4	29.2	39.1	3.6	1.9
Poland	70.7	71.2	56.2	30.6	34.4	-16.5	1.6

Source: Global Trade Tracker, 2022 *CAGR: Compound Annual Growth Rate

In 2021, the top three Canada meat products exported to the US were frozen meat of swine at US\$1,880.4 million, fresh/chilled meat of swine at US\$618.5 million and fresh or chilled bovine cuts at US\$364.8 million. Fresh or chilled bovine cuts recorded the highest CAGR of 32.3% from 2017 to 2021.

Top 10 meat products Canada exported to the US in US\$ million, 2017 to 2021

HS code	Description	2017	2018	2019	2020	2021	*CAGR % 2017-2021
Total		2,777.4	2,853.0	3,024.8	3,124.3	4,360.2	11.9
020130	Fresh or chilled bovine meat, boneless	1,041.1	1,186.4	1,365.6	1,353.0	1,880.4	15.9
020319	Fresh or chilled meat of swine	582.0	494.9	441.6	432.3	618.5	1.5
020120	Fresh or chilled bovine cuts, with bone in	119.2	163.5	168.9	252.6	364.8	32.3
160232	Meat or offal of fowls of the species prepared or preserved	179.7	202.2	211.5	230.8	274.5	11.2
020312	Fresh or chilled hams, shoulders and cuts thereof of swine, with bone in	173.7	131.2	125.2	127.0	187.0	1.9
020329	Frozen meat of swine	97.0	92.3	86.3	71.9	137.9	9.2
021012	Bellies "streaky" and cuts thereof of swine, salted, in brine, dried or smoked	64.4	57.3	80.7	99.0	133.9	20.1
020230	Frozen, boneless meat of bovine animals	41.7	45.3	44.3	47.8	103.9	25.6
020629	Frozen edible bovine offal (excl. tongues and livers)	40.1	47.6	62.7	70.9	101.7	26.2
160241	Hams of swine and cuts thereof, prepared or preserved	30.8	42.7	58.3	67.1	83.5	28.3

Source: Global Trade Tracker, 2022 *CAGR: Compound Annual Growth Rate

In terms of trade volume, Canada's top exports in 2021 were fresh or chilled bovine meat at 267.8 thousand tonnes, and fresh/chilled meat of swine at 167.7 thousand tonnes. Fresh or chilled edible offal of swine had the highest CAGR of 21.3% from 2017 to 2021.

Top 10 meat products Canada exported to the US in thousand tonnes, 2017 to 2021

HS code	Description	2017	2018	2019	2020	2021	*CAGR % 2017-2021
Total		706.4	676.2	671.6	664.7	803.3	3.3
020130	Fresh or chilled bovine meat, boneless	220.9	236.6	255.8	242.2	267.8	4.9
020319	Fresh or chilled meat of swine	175.6	151.8	134.5	135.2	167.7	-1.1
020312	Fresh or chilled hams, shoulders and cuts thereof of swine, with bone in	72.6	54.1	47.6	46.7	63.5	-3.3
020329	Frozen meat of swine	39.6	39.2	35.7	25.5	45.2	3.4
160232	Meat or offal of fowls of the species	33.0	35.3	34.3	36.2	39.9	4.9
020120	Fresh or chilled bovine cuts, with bone in	15.5	18.9	19.5	25.3	29.2	17.2
021012	Bellies "streaky" and cuts thereof of swine, salted, in brine, dried or smoked	14.6	12.7	17.7	20.4	24.4	13.7
020230	Frozen, boneless meat of bovine animals	9.6	8.9	9.6	10.6	20.2	20.4
020629	Frozen edible bovine offal (excl. tongues and livers)	13.9	12.0	15.7	16.0	17.4	5.8
020630	Fresh or chilled edible offal of swine	6.6	7.5	5.5	10.0	14.3	21.3

Source: Global Trade Tracker, 2022 *CAGR: Compound Annual Growth Rate

Canada's meat export to the USA by provinces

In terms of export value broken down by Canadian provinces, Alberta led with a value of US\$2,121.4 million in 2021, which accounted for 48.7% of Canada's total meat exports to the US. Ontario ranked second, exporting US\$1,034 million of meat in 2021, followed by Quebec at US\$838.1 million.

Canada's meat exports to the US by province in US\$ million, 2017-2021

	2017	2018	2019	2020	2021	*CAGR % 2017-2021	Market share %
Total	2,784.2	2,862.6	3,022.1	3,122.0	4,357.7	11.9	100
Alberta	1,078.1	1,215.3	1,373.3	1,473.1	2,121.4	18.4	48.7
Ontario	687.1	666.0	684.2	729.6	1,034.7	10.8	23.7
Quebec	826.3	800.7	765.7	703.9	838.1	0.4	19.2
Manitoba	171.5	161.1	173.5	185.7	318.3	16.7	7.3
British Columbia	15.0	15.8	16.5	19.4	27.3	16.2	0.6
Saskatchewan	4.8	2.5	7.9	9.6	12.7	27.5	0.3
New Brunswick	1.2	1.1	0.9	0.7	5.2	44.3	0.1

Source: Global Trade Tracker, 2022 *CAGR: Compound Annual Growth Rate

In terms of export volume by province, Alberta exported 306.5 thousand tonnes of meat to the USA in 2021, followed by Ontario at 261.8 thousand tonnes and Quebec at 210.2 thousand tonnes.

Canada's meat export to the US by province in thousand tonnes, 2017-2021

	2017	2018	2019	2020	2021	*CAGR % 2017-2021
Total	775.9	747.0	736.2	731.0	873.7	3.0
Alberta	240.6	247.3	259.9	263.7	306.5	6.2
Ontario	215.9	206.9	202.3	213.1	261.8	4.9
Quebec	257.8	235.2	215.5	190.9	210.2	-5.0
Manitoba	53.6	50.3	50.5	55.7	83.0	11.6
British Columbia	6.6	6.2	6.1	5.6	7.5	3.2
New Brunswick	0.5	0.5	0.4	0.4	2.9	55.2
Saskatchewan	0.9	0.5	1.4	1.6	1.8	18.9

Source: Global Trade Tracker, 2021 *CAGR: Compound Annual Growth Rate

1). Alberta

The top three meat products that Alberta exported to the US in 2021 were: fresh or chilled bovine meat at US\$1,482.1 million; fresh or chilled bovine cuts at US\$312.1 million; and frozen edible bovine offal at US\$86.8 million. Fresh or chilled bovine cuts had the biggest growth at a CAGR of 39.6% from 2017 to 2021.

Top 10 products Alberta exported to the US in million dollars, 2017-2021

HS code	Description	2017	2018	2019	2020	2021	*CAGR % 2017-2021
Total		1,078.2	1,215.3	1,373.6	1,472.9	2,121.2	18.4
020130	Fresh or chilled bovine meat, boneless	767.3	904.3	1,055.1	1,049.1	1,482.1	17.9
020120	Fresh or chilled bovine cuts, bone in	82.1	122.6	130.7	216.9	312.1	39.6
020629	Frozen edible bovine offal	31.6	36.4	50.8	59.0	86.8	28.7
020319	Fresh or chilled meat of swine	83.2	55.0	36.7	38.9	59.4	-8.1
020230	Frozen, boneless meat of bovine animals	26.3	27.2	28.8	32.1	56.8	21.2
160232	Meat or offal of fowls of the species, prepared or preserved	11.9	15.9	19.7	23.3	27.7	23.5
020610	Fresh or chilled edible offal of bovine animals	26.0	16.2	20.1	12.4	26.6	0.6
020312	Fresh or chilled hams, shoulders and cuts thereof of swine, with bone in	11.1	5.2	2.0	8.6	26.0	23.7
020329	Frozen meat of swine	15.1	12.7	10.4	11.5	15.2	0.2
020621	Frozen edible bovine tongues	9.7	6.6	7.0	7.6	10.8	2.7

Source: Global Trade Tracker, 2022 *CAGR: Compound Annual Growth Rate

2). Ontario

The top three meat products that Ontario exported to the US in 2021 were: fresh or chilled bovine meat, boneless at a value of US\$380.5 million, fresh or chilled meat of swine at a value of US\$253.3 million and frozen, boneless meat of bovine animals at a value of US\$40.8 million. Frozen, boneless meat of bovine animals had a fastest growth of CAGR 64.3% from 2017 to 2021.

Top 10 products Ontario exported to the US in million dollars, 2017-2021

HS code	Description	2017	2018	2019	2020	2021	*CAGR % 2017-2021
Total		686.8	666.0	684.1	729.7	1,034.6	10.8
020130	Fresh or chilled bovine meat, boneless	252.9	261.5	288.6	289.5	380.5	10.8
020319	Fresh or chilled meat of swine	188.8	158.5	154.2	152.8	253.3	7.6
020230	Frozen, boneless meat of bovine animals	5.6	9.7	9.0	10.2	40.8	64.3
020120	Fresh or chilled bovine cuts, with bone in	21.3	23.8	20.3	23.2	38.1	15.7
020329	Frozen meat of swine	36.7	30.3	20.1	22.9	28.7	-6.0
160241	Hams of swine and cuts thereof, prepared or preserved	4.3	7.5	12.2	18.9	26.5	57.6
160100	Sausages and similar products, of meat, offal or blood; food preparations based on these products	16.3	18.0	22.9	23.9	25.7	12.1
160232	Meat or offal of fowls of the species, prepared or preserved	20.9	23.5	16.0	12.5	24.1	3.6
020714	Frozen cuts and edible offal of fowls of the species	13.1	21.2	16.0	21.2	23.8	16.1
020610	Fresh or chilled edible offal of bovine animals	15.2	16.5	16.9	14.8	22.5	10.3

Source: Global Trade Tracker, 2022 *CAGR: Compound Annual Growth Rate

3). Quebec

The top three meat products that Quebec exported to the US in 2021 were: meat or offal of fowls of the species prepared or preserved at a value of US\$221.9 million, fresh or chilled meat of swine at a value of US\$214.9 million and fresh or chilled hams, shoulders and cuts thereof of swine at a value of US\$69.1 million.

Top 10 products Quebec exported to the US in million dollars, 2017-2021

HS code	Description	2017	2018	2019	2020	2021	*CAGR % 2017-2021
Total		826.1	800.7	765.4	703.9	838.2	0.4
160232	Meat or offal of fowls of the species prepared or preserved	146.7	162.1	175.2	194.8	221.9	10.9
020319	Fresh or chilled meat of swine	251.4	232.3	212.1	202.1	214.9	-3.9
020312	Fresh or chilled hams, shoulders and cuts thereof of swine, with bone in	105.5	88.5	87.2	59.8	69.1	-10.0
020329	Frozen meat of swine	41.9	43.4	34.6	26.6	57.3	8.1
021012	Bellies "streaky" and cuts thereof of swine, salted, in brine, dried or smoked	32.1	32.1	34.6	37.4	49.4	11.4
020713	Fresh or chilled cuts and edible offal of fowls of the species gallus domesticus	26.0	25.6	38.3	35.3	39.2	10.8
160250	Prepared or preserved meat or offal of bovine animals	26.4	35.6	39.7	28.7	33.1	5.8
020110	Carcases or half-carcases of bovine animals, fresh or chilled	25.4	27.8	15.6	15.2	25.1	-0.3
160241	Hams of swine and cuts thereof, prepared or preserved	23.2	24.3	25.1	21.4	22.7	-0.5
020130	Fresh or chilled bovine meat, boneless	19.6	19.7	20.1	12.8	17.1	-3.4

Source: Global Trade Tracker, 2022 *CAGR: Compound Annual Growth Rate

4). Manitoba

The top three meat products that Manitoba exported to the US in 2021 were: fresh or chilled meat of swine at a value of US\$89.9 million, fresh or chilled hams, shoulders and cuts thereof of swine at a value of US\$69.2 million and bellies "streaky" and cuts thereof of swine at a value of US\$64.3 million. The fastest growth from 2017 to 2021 was fresh or chilled edible offal of sheep, goats, horses, asses, mules and hinnies at a CAGR of 425.0%.

Top 10 products Manitoba exported to the US in million dollars, 2017-2021

HS code	Description	2017	2018	2019	2020	2021	*CAGR % 2017-2021
Total		171.3	161.3	173.4	185.8	318.4	16.8
020319	Fresh or chilled meat of swine	56.4	48.1	37.1	37.8	89.9	12.4
020312	Fresh or chilled hams, shoulders and cuts thereof of swine, with bone in	38.3	25.6	26.9	47.2	69.2	15.9
021012	Bellies "streaky" and cuts thereof of swine, salted, in brine, dried or smoked	23.3	18.3	34.3	48.1	64.3	28.9
020329	Frozen meat of swine	11.7	15.6	19.1	9.8	35.0	31.5
160241	Hams of swine and cuts thereof, prepared or preserved	3.1	10.8	20.9	26.7	34.0	82.0
020649	Edible offal of swine, frozen (excl. livers)	13.7	15.0	17.8	8.0	13.1	-1.1
020630	Fresh or chilled edible offal of swine	0.2	0.5	0.2	1.2	4.2	114.1

021019	Meat of swine, salted, in brine, dried or smoked	0.9	0.2	4.9	2.9	2.8	32.8
020680	Fresh or chilled edible offal of sheep, goats, horses, asses, mules and hinnies	0.0	0.0	0.0	0.4	2.1	425.0
020322	Frozen hams, shoulders and cuts thereof of swine, with bone in	3.5	0.5	0.2	2.2	1.4	-20.5

Source: Global Trade Tracker, 2022 *CAGR: Compound Annual Growth Rate

5). British Columbia

The top three meat products that British Columbia exported to the US in 2021 were: frozen fowls of the species gallus domesticus at a value of US\$7.4 million, preparations of liver of any animal at a value of US\$6.7 million. The fastest CAGR growth from 2017 to 2021 were prepared or preserved meat or offal of bovine animals and meat or offal of fowls of the species prepared or preserved both at a CAGR of 41.4%.

Top 10 products British Columbia exported to the US in million dollars, 2017-2021

HS code	Description	2017	2018	2019	2020	2021	*CAGR % 2017-2021
Total		14.8	15.7	16.4	19.3	27.3	16.5
020712	Frozen fowls of the species gallus domesticus, not cut in pieces	4.9	5.2	5.5	6.2	7.4	10.9
160220	Preparations of liver of any animal	0.0	0.0	0.1	0.5	6.7	**N/C
160249	Prepared or preserved meat and offal of swine, incl. mixtures	1.3	1.5	1.4	4.0	3.4	27.2
160100	Sausages and similar products, of meat, offal or blood; food preparations based on these products	2.5	2.9	2.8	3.1	2.2	-3.2
160250	Prepared or preserved meat or offal of bovine animals	0.5	0.4	0.5	1.5	2.0	41.4
020713	Fresh or chilled cuts and edible offal of fowls of the species gallus domesticus	1.4	1.6	1.5	0.9	1.3	-1.8
020711	Fresh or chilled fowls of the species gallus domesticus, not cut in pieces	0.8	1.2	1.1	0.2	0.9	3.0
020319	Fresh or chilled meat of swine	1.5	0.5	1.4	0.2	0.9	-12.0
160232	Meat or offal of fowls of the species prepared or preserved	0.2	0.7	0.5	0.2	0.8	41.4
020714	Frozen cuts and edible offal of fowls of the species gallus domesticus	0.4	0.5	0.7	0.7	0.6	10.7

Source: Global Trade Tracker, 2022 *CAGR: Compound Annual Growth Rate **N/C: Non Calculable

6). Saskatchewan

The top three meat products that Saskatchewan exported to the US in 2021 were: prepared or preserved meat and offal of swine, incl. mixtures at a value of US\$10.5 million, sausages and similar products, of meat, offal or blood; food preparations based on these products at a value of US\$1.0 million and fresh or chilled hams, shoulders and cuts thereof of swine, with bone at a value of US\$0.7 million.

Top 10 products Saskatchewan exported to the US in million dollars, 2017-2021

HS code	Description	2017	2018	2019	2020	2021	*CAGR % 2017- 2021
Total		4.9	2.5	7.9	9.5	12.7	26.9
160249	Prepared or preserved meat and offal of swine, incl. mixtures	0.0	1.3	6.2	7.5	10.5	100.6
160100	Sausages and similar products, of meat, offal or blood; food preparations based on these products	1.2	0.5	0.8	1.0	1.0	-4.5
020312	Fresh or chilled hams, shoulders and cuts thereof of swine, with bone in	0.0	0.0	0.0	0.1	0.7	600.0
020230	Frozen, boneless meat of bovine animals	2.8	0.3	0.3	0.3	0.3	-42.8
020649	Edible offal of swine, frozen (excl. livers)	0.0	0.0	0.0	0.0	0.2	**N/C

Source: Global Trade Tracker, 2022 *CAGR: Compound Annual Growth Rate **N/C: Non Calculable

7). New Brunswick

The top three meat products that New Brunswick exported to the US in 2021 were: sausages and similar products, of meat, offal or blood; food preparations at a value of US\$4.5 million, bellies "streaky" and cuts thereof of swine, salted, in brine, dried or smoked at value of US\$0.4 million and frozen meat of swine at a value of US\$0.2 million. Sausages and similar products, of meat, offal or blood; food preparations had the fastest CAGR growth of 117.8% from 2017 to 2021.

Top 10 products New Brunswick exported to the US in million dollars, 2017-2021

HS code	Description	2017	2018	2019	2020	2021	*CAGR % 2017-2021
Total		1.1	1.0	1.0	0.8	5.3	48.2
160100	Sausages and similar products, of meat, offal or blood; food preparations based on these products	0.2	0.2	0.4	0.3	4.5	117.8
021012	Bellies "streaky" and cuts thereof of swine, salted, in brine, dried or smoked	0.7	0.6	0.5	0.4	0.4	-13.1
020329	Frozen meat of swine	0.1	0.0	0.1	0.0	0.2	18.9
160232	Meat or offal of fowls of the species "gallus domesticus", prepared or preserved	0.1	0.0	0.0	0.1	0.1	**N/C
020319	Fresh or chilled meat of swine	0.0	0.1	0.0	0.0	0.1	**N/C

Source: Global Trade Tracker, 2022 *CAGR: Compound Annual Growth Rate **N/C: Non Calculable

It is important for Canadian exporters to work closely with their importing partners to ensure that the US import requirements are met and that the necessary documentation is provided. Please note that only federally registered meat establishments meeting certain criteria are eligible to export meat products to the USA. Please visit the Canadian Food Inspection Agency (CFIA) website: [United States of America \(US\) – Export requirements for meat and poultry products](#). Canadian meat exporters are encouraged to verify if their information is accurately reflected on the CFIA website before shipping their products to the USA in order to avoid potential delay or rejection at the US ports because of information discrepancies.

Consumption and spending

1) Market size

The total volume of sales of meat in US reached 21,220.2 thousand tonnes in 2021. Poultry accounted for the largest volume of meat sold in US in 2021 at 10,314 thousand tonnes (almost 50% of the total meat sales), followed by beef and veal at 7,149.6 thousand tonnes and pork at 3,525.0 thousand tonnes. Beef and veal had the highest CAGR of 2.3%. It is forecast that by 2026, total meat sales in the US will reach 23,976.7 thousand tonnes. Beef and veal is projected to have a CAGR of 2.9%, followed by poultry at 2.3% from 2021 to 2026.

Historical and forecast total volume sales of meat by category in thousand tonnes, 2016 to 2026

Category	2016	2021	*CAGR % 2016-2021	2022	2026	*CAGR % 2021-2026
Meat	20,070.8	21,220.2	1.1	21,766.0	23,976.7	2.5
Beef and Veal	6,396.5	7,149.6	2.3	7,333.4	8,259.3	2.9
Lamb, Mutton and Goat	97.7	105.6	1.6	108.1	116.5	2.0
Pork	3,569.4	3,526.0	-0.2	3,615.1	3,893.0	2.0
Poultry	9,878.5	10,314.8	0.9	10,582.6	11,572.3	2.3
Other Meat	128.7	124.2	-0.7	126.7	135.6	1.8

Source: Euromonitor International, 2022

*CAGR: Compound Annual Growth Rate

Per capita consumption of meat by the US consumers was 63.9 kilograms in 2021, up from 61.9 kilograms in 2016, and it is projected to reach 70.6 kilograms by 2026.

US Per capita meat consumption in Kilogram, historical and forecast

Geography	2016	2021	*CAGR % 2016-2021	2022	2026	*CAGR % 2021-2026
Meat	61.9	63.9	0.6	65.3	70.6	2.0
Beef and Veal	19.7	21.5	1.8	22.0	24.3	2.5
Lamb, Mutton and Goat	0.3	0.3	0	0.3	0.3	0.0
Pork	11.0	10.6	-0.7	10.9	11.5	1.6
Poultry	30.5	31.1	0.4	31.8	34.1	1.9
Other Meat	0.4	0.4	0	0.4	0.4	0.0

Source: Euromonitor International, 2022

*CAGR: Compound Annual Growth Rate

2) Retail sales value

The retail sales value of the US meat sector increased from US\$85,218.9 million in 2016 to US\$89,919.3 million in 2021, registering a CAGR of 1.1%. The sector is expected to reach to US\$1.0 billion by 2026, growing at a CAGR of 2.4% from 2021 to 2026.

Historical and forecast retail sales of meat by category in US\$ million, y-o-y exchange rates, 2016 to 2026

Category	2016	2021	*CAGR % 2016-2021	2022	2026	*CAGR % 2021-2026
Meat	85,218.9	89,919.3	1.1	93,198.7	101,014.9	2.4
Beef and Veal	33,055.9	37,612.9	2.6	39,637.4	45,014.9	3.7
Lamb, Mutton and Goat	364.6	412.9	2.5	422.8	454.2	1.9
Pork	22,703.8	23,093.9	0.3	23,569.7	24,791.5	1.4
Poultry	27,228.6	27,005.6	-0.2	27,752.5	28,828.1	1.3

Other Meat	1,866.0	1,794.0	-0.8	1,816.2	1,926.3	1.4
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Source: Euromonitor International, 2022

*CAGR: Compound Annual Growth Rate

3) Leading companies in the US processed meat sector

Tyson Foods Inc was the leading company in the US processed meat sector, representing 15.2% of the market share, followed by Kraft Heinz Co representing 10.9% of the market share. Private labels held 16.7% of the market share, while other companies held 27.7% of the market share in 2021.

Processed meat companies in the US in 2021 - Retail Value Sales in US\$ Millions and Market Share (%)

Company	Retail Sales (US\$ Millions)	Market Share %
Tyson Foods Inc	5,072.7	15.2
Kraft Heinz Co	3,615.2	10.9
Hormel Foods Corp	2,712.3	8.1
WH Group	2,147.7	6.5
Johnsonville Sausage LLC	972.3	2.9
ConAgra Brands Inc	958.5	2.9
Bar-S Foods	657.1	2.0
Land O'Frost Inc	506.8	1.5
Perdue Farms Inc	358.8	1.1
Bob Evans Farms Inc	233.5	0.7
Private Label	5,566.1	16.7
Others	9,221.3	27.7
Total	33,296.5	100.0

Source: Euromonitor International, 2022

*CAGR: Compound Annual Growth Rate

The top brand in the processed meat sector in 2021 was Oscar Mayer, at a value of US\$3,615.2 million, representing a market share 10.9% of the US processed meat market. Tyson's market share was 5.7%, Hillshire Farm's market share was 3.4% in 2021.

Top-10 processed meat brands in the US in 2021 -Retail Value Sales in US\$ Millions and Market Share (%)

Brand Name	Company Name (GBO)	Retail Sales (US\$ Millions)	Market Share %
Oscar Mayer	Kraft Heinz Co	3,615.2	10.9
Tyson	Tyson Foods Inc	1,883.8	5.7
Hillshire Farm	Tyson Foods Inc	1,143.2	3.4
Hormel	Hormel Foods Corp	1,092.0	3.3
Smithfield	WH Group	1,031.0	3.1
Spam	Hormel Foods Corp	1,018.1	3.1
Johnsonville Sausage LLC)	Johnsonville Sausage LLC	972.3	2.9
Jimmy Dean	Tyson Foods Inc	752.9	2.3
Bar-S	Bar-S Foods	657.1	2.0
Ball Park	Tyson Foods Inc	625.3	1.9
Private Label	Private Label	5,566.1	16.7
Others	Others	9,631.0	28.9
Total	Total	33,296.5	100.0

Source: Euromonitor International, 2022

*CAGR: Compound Annual Growth Rate

New Product Launch Analysis

According to Mintel's Global New Products Database (GNPD), there were 13,428 new meat and meat food products launched, in the US between January 2017 and July 2022. The number of yearly product launches

has decreased from 2,530 meat and meat products as an ingredient, launched in 2017 to 2,264 meat and meat products in 2021.

Meat products, poultry products, fish products, meat snacks and prepared meals were the top sub-categories of newly released meat and meat product (as an ingredient) launches while microwaveable and Low/No/Reduced Allergen were top claims associated with new meat and meat products as an ingredient, released during the prescribed period.

The top packaging types included skin pack (3,446 products), flexible (2,908 products) and tray (2,581 products). The new product launches were released as new variety/range extension (5,817 products), new packaging (3,967 products) and new product (2,643 products) released between January 2017 and July 2022. Unflavoured/plain, and smoke were top flavours (including blends), while salt, waters, and spices are top ingredients identified during this period.

New product launches of meat and meat products as an ingredient in the US, January 2017 to July 2022

Product attributes	Yearly launch counts						Total
	2017	2018	2019	2020	2021	2022 (Jan-July)	
Yearly product launches	2,530	2,451	2,295	2,401	2,264	1,487	13,428
Top five sub-categories							
Meat Products	681	541	473	681	578	444	3,398
Poultry Products	472	469	463	454	398	245	2,501
Fish Products	385	444	342	356	454	317	2,298
Meat Snacks	199	193	216	174	163	74	1,019
Prepared Meals	135	175	119	94	83	34	640
Top five claims							
Microwaveable	901	1,038	848	972	873	549	5,181
Low/No/Reduced Allergen	889	883	883	767	760	492	4,674
No Additives/Preservatives	803	887	818	759	668	405	4,340
Gluten Free	842	812	795	713	709	455	4,326
Ease of Use	521	603	533	605	444	315	3,021
Imported status							
Not imported	586	488	530	547	488	337	2,976
Imported	333	340	315	349	402	303	2,042
Top packaged types							
Skinpack	676	654	577	599	547	393	3,446
Flexible	568	476	558	524	478	304	2,908
Tray	396	501	425	475	475	309	2,581
Flexible stand-up pouch	207	184	181	181	177	120	1,050
Can	198	212	102	151	189	87	939
Top launch types							
New Variety/Range Extension	1,005	1,045	997	1,094	999	677	5,817
New Packaging	840	762	623	611	670	461	3,967
New Product	506	433	494	519	437	254	2,643
Relaunch	162	203	170	164	151	92	942
New Formulation	17	8	11	13	7	3	59
Top five flavours (incl. blend)							
Unflavoured/Plain	797	818	688	900	871	640	4,714
Smoke	108	106	93	85	67	64	523
Chicken	73	85	57	43	43	31	332
Beef	47	37	46	33	46	24	233
Roasted/Toasted	67	37	37	25	33	21	220
Top five ingredients							

Product attributes	Yearly launch counts						Total
	2017	2018	2019	2020	2021	2022 (Jan-July)	
Salt (Food)	1,816	1,681	1,628	1,579	1,465	928	9,097
Waters (Food)	1,570	1,496	1,323	1,341	1,227	753	7,710
Spices (Food)	978	960	941	912	755	432	4,978
White Sugar (Food)	1,008	860	830	833	745	492	4,768
Natural X Flavourings (Food)	903	832	843	754	654	436	4,422
Top five companies							
Aldi	101	122	109	95	64	76	567
Kroger	79	94	53	61	85	15	387
H-E-B	67	72	74	44	41	39	337
Wegmans Food Markets	15	46	52	61	79	69	322
Wal-Mart	120	56	27	43	20	11	277

Examples of new products

Fully Cooked Turkey Sausage Links

Company:	Hillshire Brands
Distributor:	Hillshire Brands
Brand:	Jimmy Dean
Category:	Processed Fish, Meat & Egg Products
Sub-Category:	Poultry Products
Market:	USA
Store Name:	Costco
Store Type:	Club Store
Store Address:	Los Feliz 90039
Date Published:	Jul 2022
Product source:	Shopper
Launch Type:	New Packaging
Price in local currency:	\$10.89
Price in Euros:	10.40



Product Description

Jimmy Dean Fully Cooked Turkey Sausage Links have been repackaged in a newly designed 38.4-oz. recyclable pack made of 100% recycled paperboard, containing 48 units in eighth stay-fresh packages, and bearing preparation instructions. This USDA inspected product is made of turkey that has no added hormones, contains 12g protein per serving, and 70% less fat than USDA data for fully cooked pork sausages, and can be prepared in a microwave in as little as 40 seconds. It is said to be simple and guilt free, suitable for home-freezing and contains no nitrates or added nitrites, artificial flavors or colors, preservatives or added MSG.

Roasted Chicken Breasts with Rib Meat and Gravy

Company: Hormel Foods
Distributor: Hormel Foods
Brand: Hormel Square Table
Category: Processed Fish, Meat & Egg Products
Sub-Category: Poultry Products
Market: USA
Store Name: H-E-B
Store Type: Supermarket
Store Address: The Woodlands 77382
Date Published: Jul 2022
Product source: Shopper
Launch Type: Relaunch
Price in local currency: \$6.97
Price in Euros: 6.91



Product Description

Hormel Square Table Roasted Chicken Breasts with Rib Meat and Gravy, previously under Hormel Simple Ideas, have been relaunched featuring a new brand and in a redesigned 15-oz. recyclable pack containing a BPA free tray and featuring serving suggestions and heating instructions. This fully cooked, microwavable and USDA inspected product is made with premium boneless skinless chicken breast, provides 21g protein and 0g trans fat per serving per serving and contains no preservatives, artificial colors, flavors or artificial ingredients.

Beef Chuck Shoulder

Company: Wellsley Farms
Brand: Wellsley Farms
Category: Processed Fish, Meat & Egg Products
Sub-Category: Meat Products
Market: USA
Store Name: BJ's Wholesale Club
Store Type: Club Store
Store Address: Charlotte 28134
Date Published: Jul 2022
Product source: Shopper
Launch Type: New Variety/Range Extension
Price in local currency: \$21.25
Price in Euros: 20.38



Product Description

Wellsley Farms Beef Chuck Shoulder is now available. The product is freezable, can be thawed in the microwave, and retails in a 3.67-lb. pack featuring the USDA Choice logo.

For more information

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Resources

Euromonitor International 2022

FAOSTAT Agricultural Production, 2022

Global Trade Tracker, 2022

United States Department of Agriculture (USDA), 2022. [USDA production, supply and distribution](#)

Sector Trend Analysis

Meat Trends in the US, 2022

Global Analysis Report

Prepared by: Hongli Wang, Senior Market Analyst

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