



Australia Pizza Cheese Landscape

A chapter from the Global Pizza Cheese Landscape study

July 2025

Objectives, Research Design & Methodology

OBJECTIVES	SCOPE	METHODOLOGY - PART 1	METHODOLOGY - PART 2
<p>The primary objectives for this research were to:</p> <ul style="list-style-type: none"> • To provide research and landscaping of the global pizza cheese market. • Analyse market size and growth trends in the global pizza cheese and the global pizza industry. • Identify and map key pizza operators in each export market in-scope. • Gain perspectives on consumer drivers and emerging trends. • Identify purchase drivers, trends, barriers and opportunities for US exporters. 	<ul style="list-style-type: none"> • Australia • See appendix A for list of all global markets included in the study. • Interviews conducted: August to November 2024 • Analysis, quality checks and reporting : December 2024 – July 2025 	<p>Trade data:</p> <ul style="list-style-type: none"> • Import and export data reviewed for main pizza cheese-related HS codes. • USDEC Global Cheese database reviewed and analyzed for all pizza cheese varieties included in the database itemization. <p>Review of secondary data</p> <ul style="list-style-type: none"> • Multiple industry reports, media articles and local trade data consulted. <p>Primary Research: Trade</p> <ul style="list-style-type: none"> • Trade interviews and consultations completed. See appendix A for the total global count. • Conducted both in-person and virtually • Interviews were split as follows: Manufacturer/Importer/Distributor: 30%, Retailers: 15%, Foodservice: 45%, Other: 10%. <p>Primary Research: Consumer</p> <ul style="list-style-type: none"> • Consumer connections were conducted including multi-participant focus groups. See appendix A for the total global count. 	<p>USDEC Inputs</p> <ul style="list-style-type: none"> • USDEC Regional offices interviewed during research phase

Definitions

Pizza Cheese Varietals: Volume of natural mozzarella, cheddar, parmesan, provolone, string, gouda, and ‘pizza cheese’ blends across all uses – both on pizza and in other forms. Does not include processed or analog cheese varieties.

Cheese on Pizza: The volume of mozzarella, cheddar, parmesan, provolone, string, gouda, and ‘pizza cheese’ blends consumed specifically as a pizza topping. This includes processed and analog cheese on pizza.

Pizza Sector: All restaurants where pizza is available on the menu – not just pizza restaurants.



Australia in Global Context



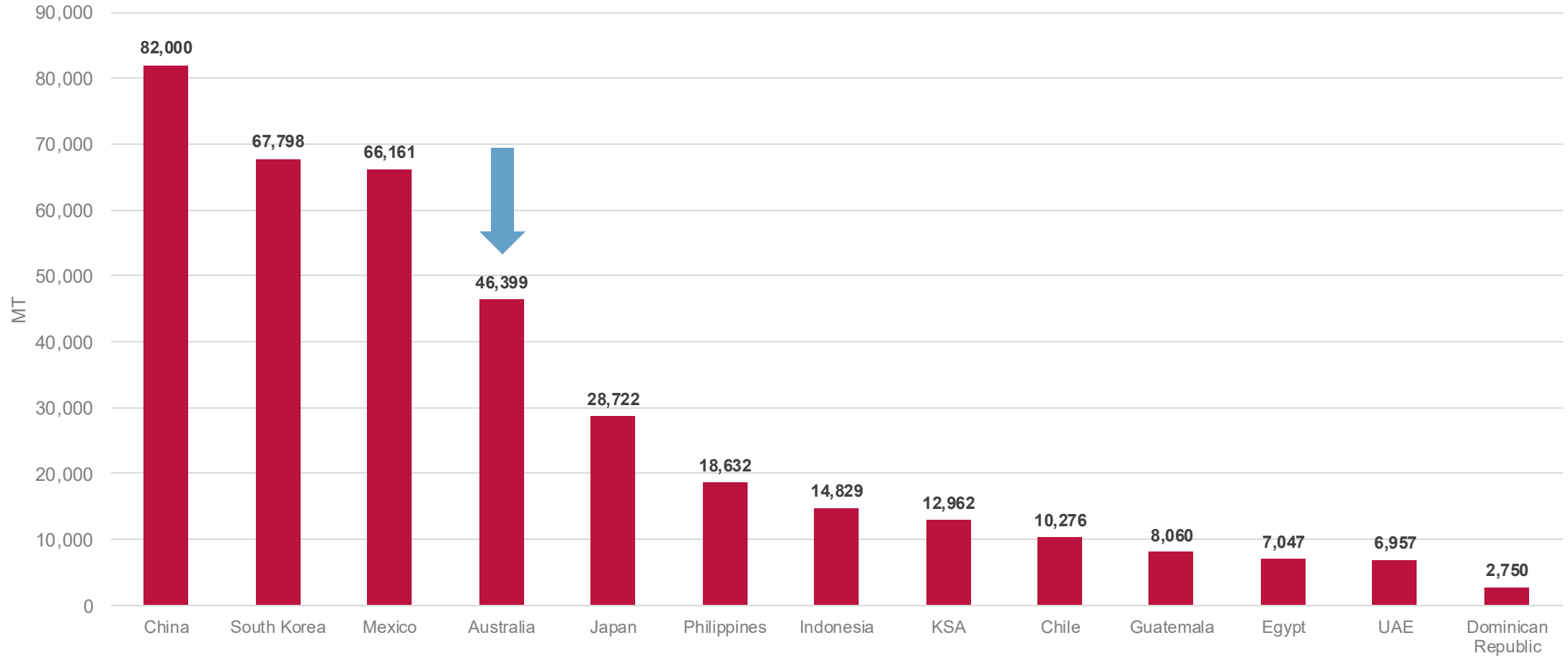
For pizza cheese varietal consumption, Australia has remained the largest market. Mexico and Australia will see the largest volume gains of pizza cheese varietals consumption.

Pizza cheese varietals consumption: 2021-2026f across all markets

Consumption MTs	2021	2022	2023	2024	2025 (f)	2026 (f)	Volume +/- 2021-26	CAGR 2021- 2026
Australia	155,376	166,201	184,062	187,440	191,056	194,193	38,817	4.6%
Chile	136,226	120,354	128,525	126,581	128,293	130,173	(6,053)	-0.9%
China	74,961	62,318	77,172	82,841	88,259	93,802	18,841	4.6%
Dominican Republic	16,343	20,059	21,458	21,763	22,495	23,410	7,066	7.5%
Egypt	17,602	15,143	14,626	14,421	14,328	14,369	(3,234)	-4.0%
Guatemala	10,789	14,422	16,898	17,418	17,972	18,518	7,729	11.4%
Indonesia	10,488	12,086	10,811	11,814	12,544	13,429	2,941	5.1%
Japan	144,837	143,102	138,519	140,303	141,132	141,580	(3,257)	-0.5%
KSA	37,594	38,724	41,573	42,137	43,028	43,910	6,315	3.2%
Mexico	94,045	110,690	135,764	140,878	145,521	150,125	56,080	9.8%
Philippines	22,114	13,899	13,684	14,292	15,011	15,724	(6,390)	-6.6%
South Korea	99,010	97,816	109,716	113,735	118,185	123,911	24,902	4.6%
UAE	16,591	25,202	25,750	25,958	26,415	26,933	10,342	10.2%

Australia is the fourth largest market for cheese on pizza by volume.

Cheese on Pizza Volume 2024



Market opportunity comparison: Scoring key

- To compare the current situation and potential opportunity across the markets, a standardized scorecard has been developed.
- This applies a consistent approach, using the same measures and scoring convention for each country included in the study.
- The table below highlights the 12 different criteria used and the scoring convention for each measure.

Criteria	Scoring convention - scored 1 (lowest) to 5 (highest) for each measure*
Total Pizza Cheese Varietal Consumption	Total consumption (MT), with markets scored relative to each other. Bottom 2 markets (1 point) through top 3 markets (5 points).
Varietal Consumption Forecast CAGR	Forecast pizza cheese varietal CAGR 2024-26. Declining market/negative growth (1 point) through to 4%+ (5 points).
Varietal Import Volumes	Total pizza cheese varietal imports in MT ranging from lowest under 10k (1 point) to highest 100k+ (5 points).
Cheese-on-Pizza volume (MT)	Total cheese used in pizza industry in MT from lowest under 10k (1 point) to highest 100k+ (5 points).
PCC Cheese-on-Pizza (kgs)	Total per capita consumption (MT) scored relative to each other. Bottom 2 markets (1 point) through top 3 markets (5 points).
Mozzarella for Pizza Self Sufficiency Index	Percentage of mozzarella <u>for pizza use</u> covered through local production. For instance, 100+ (1 point) through to less than 10 (5 points) indicating likely self-sufficiency versus probable ongoing reliance on pizza cheese varietal imports. More detailed explanation is found in Appendix A .
Pizza Foodservice Consolidation	Less consolidated market scores higher as broader range of potential customers. High outlet share of 'big 3' is more consolidated. 1 point = big 3 dominate with over 25% share of outlets through to 5 points = multiple/variety of sizeable chains and lower dominance of big 3.
Retail Channel Opportunity	Retail share of pizza consumption. Higher share = more developed and greater volume opportunity and greater interest and relevance to consumers. 1% share or less = 1 point through to 25%+ retail share of pizza (5 points).
Geographic Diversity	Number of important/significant cities to the pizza industry (taken from research sample). Only one major city dominating the outlet universe = 1 point through to 6+ cities = 5 points.
Tariff & Non-Tariff Barriers*	As graded by USDEC. Red 1 point through to Green 4 points (*measure scored out of maximum 4) *Disclaimer: Barrier ratings in this report are as of December 2024. For real-time updates, refer to USDEC Trade Policy's tariff tracker .
Price Sensitivity	Subjective measure based on pizza cheese varietal research and industry feedback. Very high (1 point) through to Low (5 points).

Market opportunity comparison: Scoring results

Criteria	Australia	Chile	China	Dominican Republic	Egypt	Guatemala	Indonesia	Japan	KSA	Mexico	Philippines	South Korea	UAE
Pizza Cheese Varietal Consumption (MT)	187,440	126,581	82,841	21,763	14,421	17,418	11,814	140,303	42,137	140,878	14,292	113,735	25,958
Varietal Consumption Forecast CAGR	1.8%	1.4%	6.4%	3.7%	-0.2%	3.1%	6.6%	0.5%	2.1%	3.2%	4.9%	4.4%	1.9%
Pizza Varietal Import Volumes	57,547	41,771	81,098	17,646	7,236	12,226	9,940	127,842	27,603	137,426	12,012	109,833	23,796
Cheese-on-Pizza Volume (MT)	46,399	10,276	82,000	2,750	7,047	8,060	14,829	28,722	12,962	66,161	18,632	67,798	6,957
PCC Cheese-on-Pizza (kgs)	1.7	0.5	0.1	0.2	0.1	0.4	0.1	0.2	0.4	0.5	0.2	1.3	0.6
Mozzarella Self Sufficiency Index	210%	157%	3%	41%	77%	81%	15%	23%	202%	5%	25%	8%	51%
Pizza Foodservice Consolidation	12%	12%	21%	13%	14%	31%	23%	12%	20%	10%	5%	9%	26%
Retail Channel Opportunity	17%	27%	12%	3%	2%	4%	1%	36%	12%	12%	1%	6%	10%
Geographic Diversity (cities)	6	1	6+	3	2	1	3	6+	2	5	3	5	2
Non-Tariff Barriers	Green	Yellow	Yellow	Yellow	Orange	Yellow	Orange	Green	Yellow	Yellow	Green	Green	Green
Tariff Barriers	Green	Green	Orange	Green	Yellow	Green	Yellow	Yellow	Yellow	Green	Green	Green	Yellow
Price Sensitivity	Mod/Low	Mod/High	Mod/High	High	Very High	Very High	Mod/High	Moderate	Moderate	Moderate	High	Mod/High	Moderate

Australia is a top-ranking market for U.S. export opportunity.

Country	Score /58	Summary of market opportunity
South Korea	51	A very large volume market with a strong consumer affinity to pizza. Significant mozzarella applications in pizza (among other applications such as corn dogs) combine to mean pizza cheese varietal consumption is growing ahead of total cheese. Aging population is a headwind though.
Mexico	49	One of the strongest potential markets when looking across the evaluation criteria. Large pizza cheese varietal market, an array of mid-sized and large potential customer buyers and currently good market access. Opportunities in higher end restaurants growing in affluent urban areas.
Australia	46	A large pizza cheese varietal market, enjoying organic growth, particularly in home consumption. Good market access and receptivity to U.S. pizza cheese varieties. Range of geographic options with multiple cities in play, and a well-developed retail channel to work with alongside foodservice.
Japan	46	A reasonably-sized pizza market volume, although mature, offers some diversity for potential new market entrants. A range of different end users, with high outlet counts, and high numbers of large urban centers. Some specific potential opportunities in gouda and provolone.
China	40	A high-volume market despite very low per capita pizza consumption. Very low pizza cheese varietal self sufficiency, hence reliance on import. High trade barriers but a significant size of prize, despite consumer spending pressure, pizza operators continue to seek outlet expansion.
Chile	37	Rapidly expanding foodservice outlets provide a broader customer buyer base although likely need to partner with 'big 4' to achieve scale. Modest volume play, although tariff advantages and existing close trading relationship with the U.S. is positive.
UAE	34	A growth market and a trading hub into the broader GCC where the pizza industry is yet to reach maturity. U.S. products fit well and there is a lower presence of Oceania than markets in the Far East. Positive market access dynamics.
Philippines	34	Good existing affinity with U.S. supply but fragmented supplier base, offering further opportunity for share gain. Especially given very low pizza cheese varietal self-sufficiency. Options to supply straight to end user. Higher end HoReCa could be one route to market.
Saudi Arabia	33	An organically growing market with pizza performing well and with consumer trends supporting further expansion. Alongside mainstream pizza there is potential in gourmet/specialty pizza (and pizza cheese varietal). Low current U.S. share of exports suggests further market runway.
Dominican Republic	33	A small market but with dependable, steady growth. Market access is not currently a major obstacle and a consumer desire for quality and a subtle shift towards some more premium pizza options might represent niche opportunities for some producers.
Indonesia	28	A young, vibrant and large population with a high relevance to pizza cheese varietal usage. Economically under pressure but showing resilience which could bring longer-term opportunity for those willing and able to navigate the relatively high tariff and non-tariff barriers.
Guatemala	26	Some challenging market metrics to contend with, but a market where pizza is a very popular choice, with high frequency of consumption. Price sensitivity is very high as is a need to try and overcome supply uncertainty, but there are good existing trade links with the U.S.
Egypt	23	A market emerging from deep economic difficulties. Significant market barriers, and importance of price resulting in this being a low potential market but may be a longer-term strategic opportunity as the economy recovers and potentially starts to grow. Some niche opportunities.



Australia Market Overview



The cheese and dairy industry is in flux, which presents both tactical and strategic opportunities for exporters to the region.

Market summary

- The dairy industry is evolving, with closures among production and processing facilities (particularly in the last two years) caused by milk shortage, high pricing, flood of imports, high costs, and inflation. Closure of Beston Global Food Company is the most recent (according to web sources, going into receivership in October 2024). This company is operating in milk powders, but also mozzarella and cream cheese.
- However, there has been investment in new production facilities and other operational capabilities through the likes of Pure Dairy.
- In addition, acquisitions of major domestic pizza cheese varietal producers indicate further consolidation.
- The industry is under pressure, and to an extent, we may be witnessing long-term structural decline in domestic production, but attention has shifted more towards cheese (and whey) production, QSR, and foodservice is still seen as an important channel.

Pizza and pizza cheese varietal trade and consumption

- Pizza is Australia's favorite takeaway food. Previous studies have indicated that one-third of Australians have pizza as their top food choice. As such, the market is seeing good, organic growth, very much driven by home delivery via online ordering platforms.
- Within pizza and pizza cheese varieties, the market is very mature, and so the evolution from base mozzarella to a broader range of widely used cheese varieties is more developed (although mozzarella still dominates).
- There has been a decrease in restaurant foot traffic and an increase in at-home preparation and consumption of pizza due to economic factors and due to the rise in home delivery technology and options.
- A previous period of high domestic milk prices in 2023 provided an opportunity for U.S. exporters, and while Australian producers anticipated consumer rejection of white U.S. mozzarella, this did not materialize.
- This bodes well when evaluating future opportunities, as traditional wisdom had suggested that there may be trade, consumer taste, and perception barriers towards U.S. products, but this might not be true for pizza cheese varietal.
- Coupled with a lack of significant tariff and non-tariff trade barriers, this makes Australia a high-potential market.



Opportunities and Challenges

Strong growth potential is driven by high per capita consumption, growing home preparation with pizza ovens, a shift toward gourmet pizza, and consumer acceptance of U.S. pizza cheese.

Opportunities

- Australia's pizza consumption per capita is large, and the total addressable pizza cheese market is significant. This is a large market to pursue for those processors where there might be a good strategic fit.
- Australian market access is good, with relatively low barriers to entry compared to some other large markets like China and Japan.
- Although price is a very important factor, importers do value loyalty and longer-term partnerships.
- Branded pizza cheese into retail to cater to the growth in home consumption and home preparation of pizzas through the use of pizza ovens. Pizza cheese that performs well on home pizza ovens and can be marketed as such will have a ready audience.
- The in-market transition towards more gourmet pizza restaurants and deliveries provides an opportunity for high-quality/natural U.S. pizza cheese.
- Taste and presentation of milder U.S. cheeses do not present a barrier where mozzarella is concerned. During 2023, large quantities of 'white' U.S. mozzarella came into the market and, despite initial trade skepticism, were readily accepted by consumers.

U.S. exporters must navigate strong local competition from New Zealand and national preferences for Australian-made products.

Challenges

- The industry has been rapidly consolidating through both company acquisitions and closures of processors.
- 2023 saw U.S. pizza cheese as being highly price competitive, which resulted in a large influx of U.S. product into the market, but adjusted Australian milk prices in 2024, and Australian/New Zealand access to cheaper milk at this point, is seeing the U.S. as much less competitive.
- There is a challenge over prominence given to 'Australian Made' where branded goods packaging features the percentage of ingredients that are locally made/produced.
- National pride may present a barrier, but this is more likely to impact the retail channel than foodservice due to greater transparency and messaging on retail product packaging.
- New Zealand is a very strong 'local' competitor. Its proximity and, to a degree, interrelatedness (e.g., importers that deal with both markets) certainly present an ongoing challenge that U.S. exporters will need to navigate.

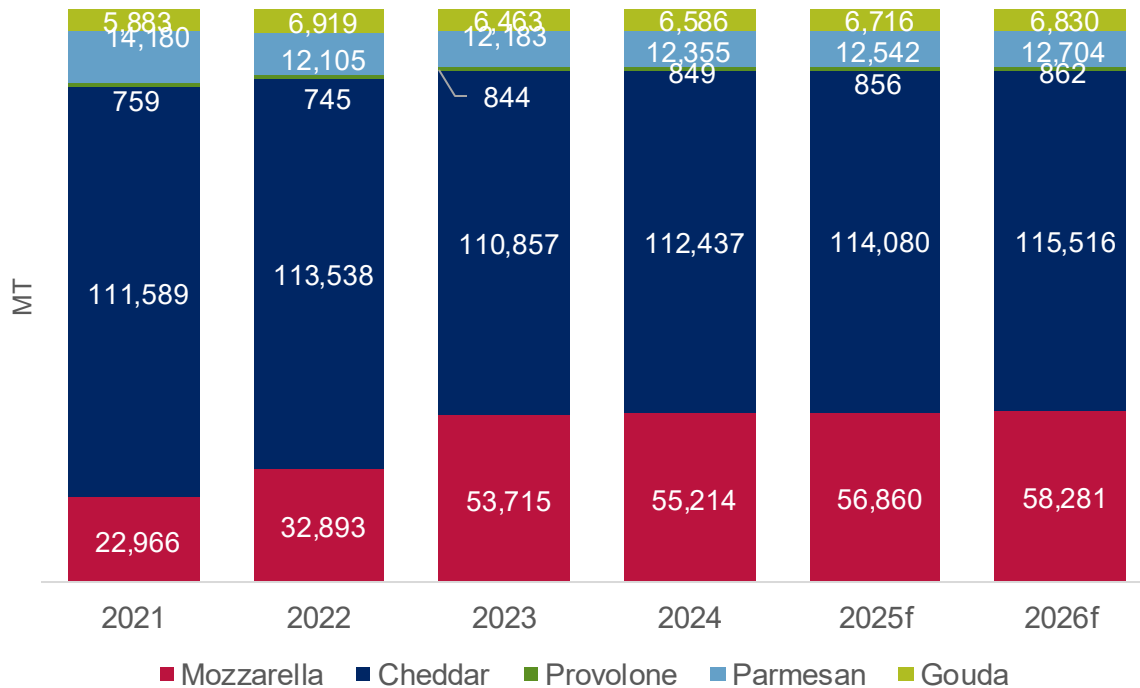


Pizza Cheese Metrics



Pizza cheese varieties universe: There is good diversity across varieties, with notable growth in mozzarella consumption.

Total Pizza Cheese Varietals Volume 2021-2026f



2024 Volume Forecast:

- ▶ Total pizza cheese volume projected at 187,440 metric tons
- ▶ Strong representation across all cheese varieties

Category Trends:

- ▶ Cheddar has held steady in volume but lost market share to mozzarella since its 2021 peak

2023 Market Value:

- ▶ Total value reached \$925 million
- ▶ Robust CAGR of +12.2% across the analysis period

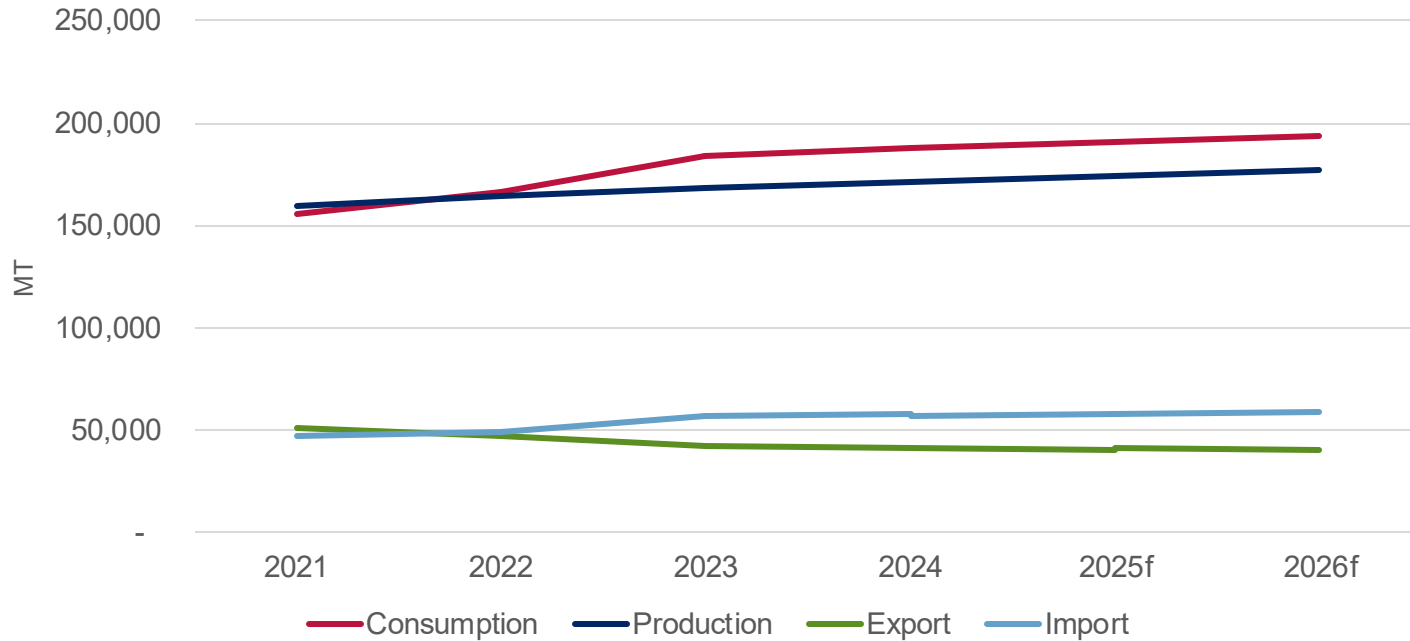
Key Growth Driver:

- ▶ Growth largely fueled by mozzarella volume increases, not pricing

Value (\$M)	2021	2022	2023	CAGR 2021-23
Total Varietals	735	814	925	12.2%
Cheddar	514	578	559	4.4%
Mozzarella	91	127	220	55.3%
Others	130	109	146	5.8%

Supply situation: Overall consumption is steadily increasing, supported by domestic production and imports.

Pizza Cheese Varietals: Production, Trade and Consumption Volumes 2021-2026f



Volume MTs	2021	2022	2023	2024	2025	2026
Consumption	155,376	166,201	184,062	187,440	191,056	194,193
Production	159,195	164,166	168,606	171,459	174,226	176,686
Export	51,039	47,069	41,774	41,566	41,235	40,970
Import	47,220	49,104	57,230	57,547	58,065	58,478

Disruption & Decline in Production

- ▶ 2017 droughts triggered farm exits, removing ~500M liters from the milk pool.
- ▶ Post-COVID normalization was short-lived; 2022–2023 brought high farmgate milk prices and rising input costs.
- ▶ Result: reduced production capacity, especially in milk powder over cheese.

Inflation Pressures & Export Impact

- ▶ High production costs drove domestic trading down behavior.
- ▶ Australia became less competitive globally, with dairy exports declining from 2021–2023.

U.S. Gains Ground in Pizza Cheese

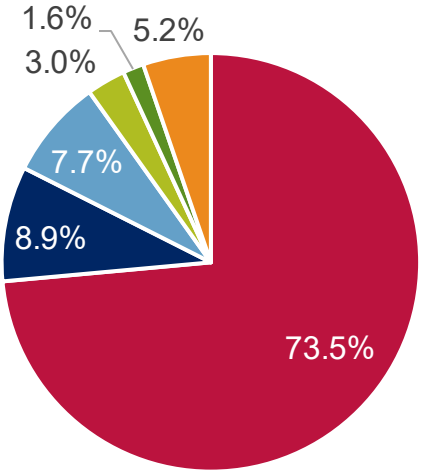
- ▶ U.S. mozzarella exports to Australia surged by ~3,000 MT in 2023 vs. 2022.
- ▶ In 2023 and YTD 2024, the U.S. became nearly twice as important a supplier as neighboring New Zealand.

Data for the next two slides describes Cheese on Pizza volumes. The previous two slides covered Pizza Cheese Varietals, which include non-pizza uses.




Varietal mix: Mozzarella dominates due to its use across foodservice pizza chains, although there is presence of cheddar and parmesan through ‘pizza cheese’ blends sold at retail.

2024 Cheese on Pizza Volume Share



■ Mozzarella ■ Cheddar ■ Parmesan ■ Ricotta ■ Provolone ■ Others

 Total cheese on pizza use: 46,399 MT	
Pizza Cheese Product Mix	2024 Volume (MTs)
Mozzarella	34,126
Cheddar	4,127
Parmesan	3,570
Ricotta	1,392
Provolone	750
Others (incl. Feta, Vegan Cheese, Gorgonzola, Pecorino)	2,434

- Australia’s pizza sector represents a significant total addressable market of over 46,000 MT of cheese annually, with mozzarella as the dominant variety, alongside substantial volumes of cheddar and parmesan.
- Mozzarella remains the base cheese in foodservice, often combined with a diverse range of other cheese varieties, reflecting a mature and evolving pizza market that is gradually shifting beyond mozzarella-only toppings.

Finished pizza market: At 180,000 MT, the market is dominated by foodservice and international chains, though opportunities remain in retail.

2024: Pizza Market* 180,000 MT		 Retail: 17%	 Foodservice: 83%
Foodservice Operators	International/National	Number of Outlets	
Domino's Pizza	International	730	
Pizza Hut	International	260	
Crust Gourmet Pizza	National	136	
La Porchetta	National	30	
Amalfi Pizza & Pasta	National	27	
Bubba Pizza Pasta & More	National	22	
Pizza Capers	National	20	
Pizza Manoosh	National	14	
Mad Toppings	National	13	

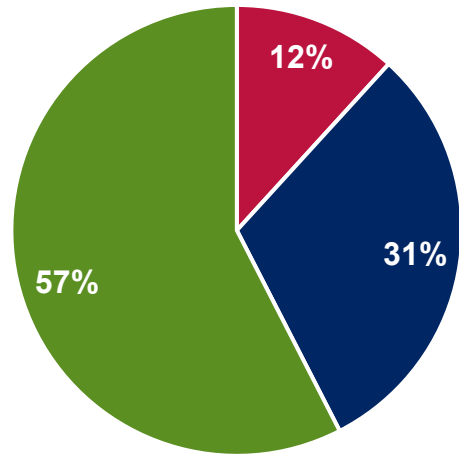
- Although Domino's clearly leads the market, Pizza Hut remains a formidable competitor through both organic growth and acquisitions and mergers (e.g., merger with Eagle Boys pizza from 2016) as it continues to add to its outlet count. Demand during Covid and an acceleration of delivered pizzas has helped this part of the market to thrive.
- Although the international chains dominate, Crust Gourmet (part of the Retail Food Group stable) is a credible third player in the market, demonstrating the role for a higher-end, more premium and gourmet offering.
- Among the mid-sized players, Pizza Manoosh – which is more of a Sydney phenomenon – is gaining outlets and trading on Lebanese heritage. As a result, in addition to mozzarella, feta cheese is being used in a selection of their pizzas.

*Finished pizza market is the volume of pizzas sold. The figures are drawn from both primary and secondary work.

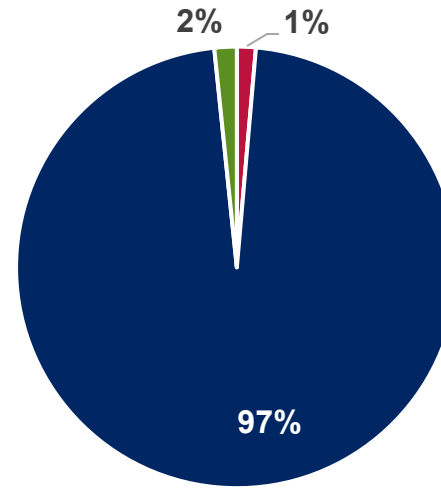
Buyer Universe, Preferences, and Drivers

Market mapping: Although Domino's and Pizza Hut lead the market, there is a broad representation of both national chains and independents.

2024 Pizza Outlets by Category



2024 Pizza Outlets by Pricing



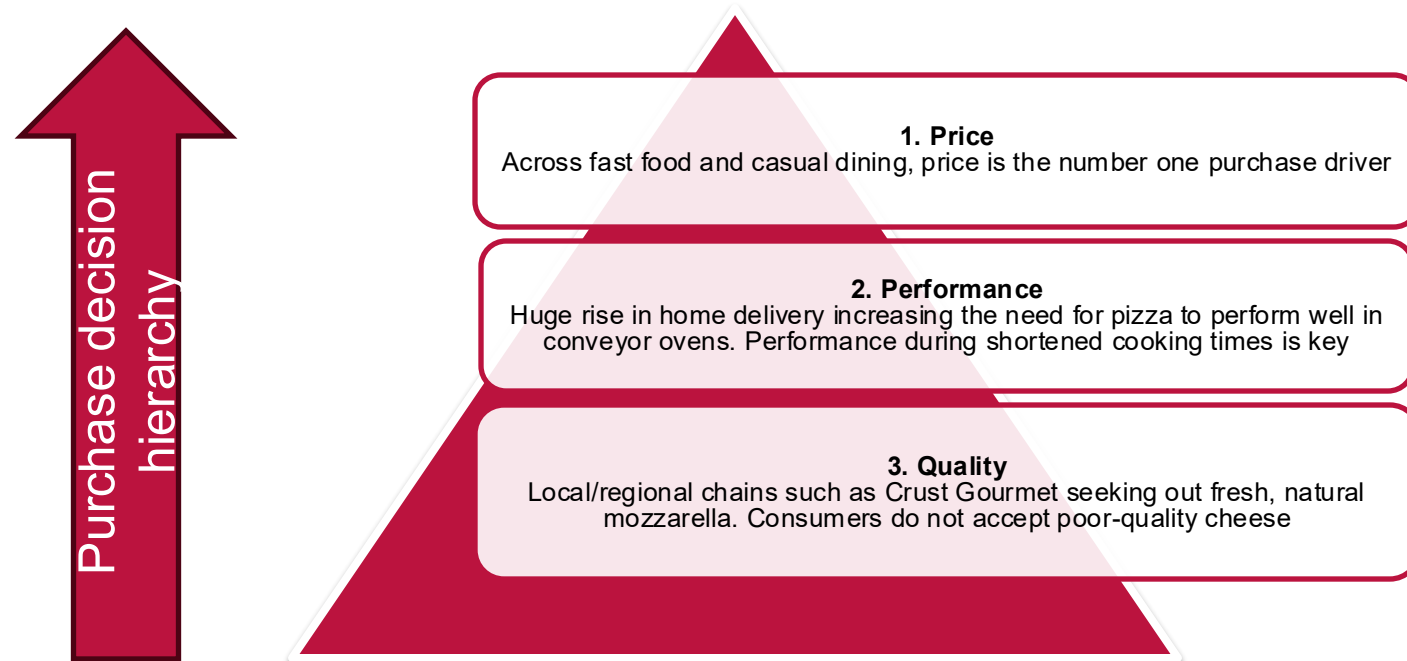
■ Multinational Chain ■ National Chain ■ Independents

■ High Priced ■ Medium Priced ■ Low Priced

Total Pizza Outlets: 8,100	
City	Rank
Melbourne	=1
Sydney	=1
Brisbane	3
Perth	4
Adelaide	5
Gold Coast	6
Canberra	7
Newcastle	8

- Australia has an estimated 8,100 foodservice outlets with pizza on the menu, with independent and specialty pizzerias making up 57% of the market, reflecting a highly fragmented landscape of pizzerias, Italian restaurants, and broader menus featuring pizza.
- Melbourne and Sydney are the leading urban centers for pizza, driven by large populations, tourism, and business traffic, while Brisbane and Adelaide, though smaller, have a high density of pizza outlets and present strategic opportunities for market entry by exporters.

Buyer drivers: Price is important, but long-term partnership drives loyalty to international suppliers.



- Market conditions demand tight pricing, but loyalty to suppliers also ranks highly. Importers indicated a desire to build solid relationships with supplier recommending a longer-term strategic approach.
- 'Australian Made' labeling and national pride can pose challenges for U.S. cheese acceptance, particularly in retail, though this barrier is less pronounced in foodservice and tends to diminish during economic hardship when consumer priorities shift toward value over origin.

Buyer preferences: Shredded and cubed cheeses are widely used, blocks support in-house shredding, and buyers prioritize yellow color, consistent baking performance, and high-fat mozzarella.



Formats:

Shred and cubes are both popular in Australia

Blocks are used where restaurants shred 'in-house'

As a local example, Bega Foodservice supplies shredded cheddar, mozzarella, and parmesan to foodservice, packaged in 1kg and 2kg bags

25%-30% of the mozzarella consumed in Australia is fresh/non-processed, with the remainder being shredded, grated, or IQF



Preferences:

Yellow color is preferred by trade buyers

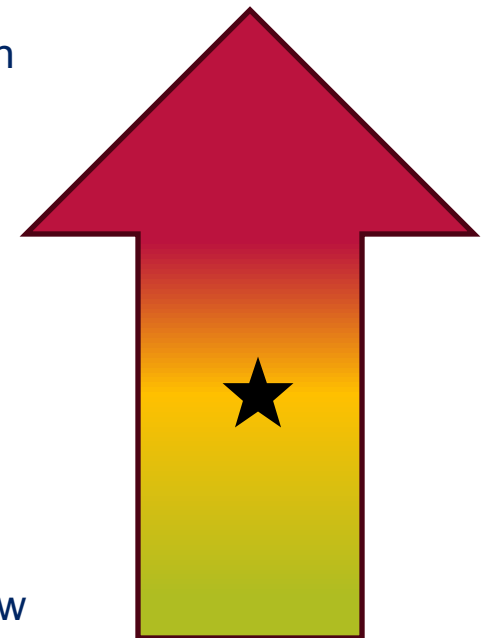
Consistent baking performance (high speed conveyors) with a firm stretch

Consistent quality (therefore there is a preference towards larger exporters with high-quality standards in place)

High fat content is favored by establishments buying mozzarella blocks to shred in-house (to avoid burning)

Price Sensitivity Rating: MODERATE/LOW

High



Low

- The 2023 surge in U.S. mozzarella imports to Australia (driven by local price pressures) challenged expectations, as consumers readily accepted the whiter U.S. format despite initial concerns about preference for traditional grass-fed yellow mozzarella—signaling strong potential for future U.S. growth in the market.

Buyer landscape: A broad range of potential buyers exists for pizza cheese varieties, including large importers and traders who can support the route to market.

Pizza Manufacturers		Importers/Traders/Distributors	Retailers	
Company Name	Brand	Company Name	Company Name	Store Count
Mc Cain Foods Dr. Oetker Australia Pty. Della Rosa Traditional Fresh Foods Laird & Pascoe Trading Company Pty. Buonissimo Bakery Pty.	McCain Dr. Oetker, Papa Giuseppes Della Rosa Laird & Pascoe Buonissimo Cucina	Ausfine Maxum Foods F Mayer Imports Gulli Food Distributors Kinrise Hoogwegt Americold	Coles Woolworths Aldi Costco	850+ 995 595 15

- In addition to foodservice, buyers of pizza cheese varieties believe all other links in the supply chain are well covered.
- Pizza manufacturers (frozen and chilled) McCain and Dr. Oetker have extensive ranges sold through the main modern retailers with an estimated combined share of >75%.
- Retailers Woolworths and Coles have traditionally dominated the retail channel for pizza. Recently, Costco and German discount retailer Aldi have been gaining market share.
- Within retail there are several 'pizza cheese' and 'pizza melt' SKUs available (e.g., Perfect Italiano brand), typically mixing mozzarella with cheddar and parmesan, sold chilled and pre-shredded and bagged for use in home pizza making or other home applications.

Operator profiles: Domino's and Ausfine Foods

	Domino's Pizza Enterprises (largest franchisee for the Domino's brand in the world): 730 outlets
Positioning & Activities	Nationwide chain occupying both city and country locations. Aim to provide great products at 'an affordable price'. Clear market leader in Australia Take out specialists operating firmly in the QSR sector
Performance	\$2.4 bn (Year to 30 June 2024) with growth of +2.7%. This is the company's fastest recorded growth in the last 6 years in this region Outlet numbers have grown substantially from a figure of 562 recorded in 2015. Not only have numbers grown but stores have been expanding their opening hours to cater for lunch time and late night consumption occasions. However, it should be noted that some challenging conditions have meant that there have been 'fewer store openings' according to the latest company reports
Pizza cheese, requirements and sourcing	Estimated annual pizza cheese requirement is 8,500 MT Shredded mozzarella is sourced via the United States Pizza cheese needs to be able to perform using conveyor ovens and should be able to cope with the demands of both speed of cooking and consistent performance Recent innovation includes My Domino's Box, Meltzz and the Volcano which uses a "new stretchier, tastier signature Mozzarella" (company website) Onsite refrigeration capacity likely to be limited, but frequent store deliveries. Onsite freezers and chilled 'makeline' preparation stations for cheese storage and usage. The makelines typically hold the temperature rather than necessarily refrigerating and product must be filled below 5 degree celcius
Additional information	Although Domino's performance has been coming under well publicized pressure, they remain the market leader in Australia, and the regional performance growth in the latest year is the strongest seen in the last 6 years in this region Domino's remains innovative, embracing technology and menu innovation that supports the home delivered model. Australia can be at the forefront of innovation within the Domino's organization. The roll out of the temperature controlled dxb delivery bike, with G Force stabilization and fan forced ventilation systems is a good example with trials starting from November 2023

	Ausfine Foods
Positioning & Activities	Ausfine Foods is a meat and dairy trading company based in Victoria. The company specializes in working with both international buyers and sellers, offering market access and strategic advice. The company is 100% Australian owned, but importantly works with a range of global suppliers They are positioned as offering a fairly holistic service, helping with import logistics and documentation, storage, co-packing and distribution, including partnering with distribution centers to cover the 'last mile' distribution. They cite a particular specialism here in dealing with the QSR sector, which is highly relevant when looking at the pizza category. Within cheese they are offering bulk, foodservice and retail sized packs.
Performance	Turnover is estimated to be around \$350-450m AUD
Pizza cheese, requirements and sourcing	The company trades cheddar, mozzarella, pizza cheese, gouda, parmesan and provolone The following are estimated volumes per annum: Mozzarella c. 1,000 to 1,500 MT Cheddar c. 1,500 to 2,500 MT They mostly purchase cheddar and mozzarella. This is across different formats including barrels. Within mozzarella the most frequently purchased format is 20kg blocks for onward sale and also for processing. Buying in blocks is likely to provide greater versatility and flexibility when working with different end users and can mean varying product offer depending upon market demand All purchasing decisions are taken by the commercial team out of the Melbourne office Purchasing decisions are based on a combination of pricing and margin calculations but also consistency of supply is an important factor when deciding whether to work with new suppliers
Additional information	The company prides themselves on offering strong services to suppliers and is also willing to consider a range of shipment sizes (not just large). Amongst other cheese types, pizza cheese is a sector where they have operated and may look to work further in the future

Operator profiles: Retail Food Group

	<p>Retail Food Group: QSR chain operator: 156 outlets across the Crust Gourmet and Pizza Capers franchises</p>
Positioning & Activities	<p>Retail Food Group Limited (evolving towards new identity of Savora Brands announced in 2024). Retail Food Group (RFG) is a global food and beverage company headquartered in Queensland, Australia. RFG is Australia's largest multi-brand retail food and beverage franchise owner</p> <p>High end, specialty positionings - filling the gap in a market where Domino's has such a strong market share</p>
Performance	<p>They are the owner of Pizza Capers and also Crust Gourmet Pizza. Pizza may represent a more modest share of overall portfolio, but they are still one of the largest Australian chains</p> <p>Total revenue 2024 \$132m up from \$120m in 2023. QSR division in 2024 came under pressure through competitor discounting, resulting in a 3.4% decline in like for like revenues. QSR revenues down -5.9%</p> <p>Looks like there may have been some closures in the pizza segment with Pizza Capers reducing outlet count very significantly from over 110 in 2025 to approximately 20 in 2024. QSR customer count fell from 3.7m to 3.3m</p>
Pizza cheese, requirements and sourcing	<p>Total cheese usage (estimated): 1,100 MT</p> <p>Mozzarella (including Buffalo Mozzarella): 850 MT</p> <p>Parmesan: 50 MT</p> <p>Others (including Bocconcini, Feta and Vegan Cheese): 200 MT</p> <p>They purchased chilled mozzarella as opposed to IQF. Buffalo mozzarella is a key ingredient across a number of their pizzas</p> <p>Cheese is 100% sourced from Australian supplier</p> <p>Crust uses double layer conveyor ovens</p>
Additional information	<p>Good market position towards upper end/gourmet. Embracing technology such as self ordering kiosks and also creative LTOs and engagement through the digital brand to increase overall order/trip size. Innovative in terms of toppings, leveraging new trends such as the 'sweet spicy' trend in savory foods delivered through the 'Classics with a Twist' range, adding hot honey and tropical spice flavors. However, the brand is under price pressure, and a move from fresh, buffalo mozzarella towards frozen/bulk may lead to an opportunity for a range of US producers</p>



Consumer Preferences and Trends

Consumer drivers: Pizza consumption in Australia has grown post-Covid, driven by online ordering, preference for local ingredients, sustainability focus, and strong demand for meat toppings alongside menu innovation.

ONLINE ORDERING

Since the Covid pandemic, Australians have been increasing their pizza consumption, shifting towards online ordering and leveraging technological improvements.

SUSTAINABILITY

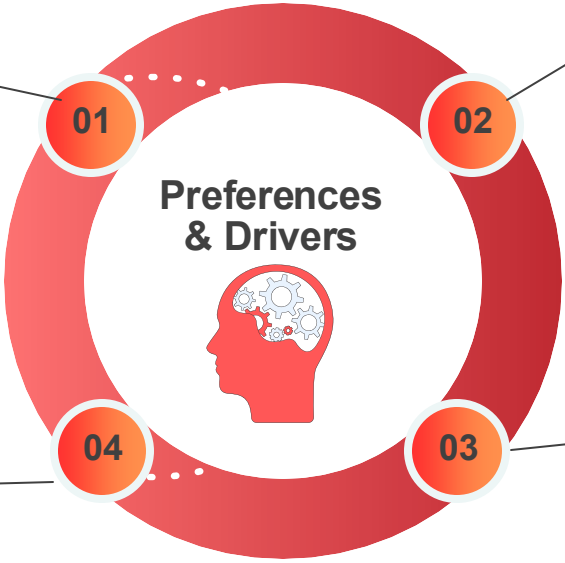
Some pizza chains move towards more sustainable packaging solutions indicates a growing awareness and prioritization of the environment.

LOCALLY SOURCED INGREDIENTS

There is a preference for locally sourced, 'Aussie' ingredients. Supporting local producers and boosting sustainability credentials is a priority for some consumers.

MEATY TREAT

Although margherita/cheese topping is the most popular, meat toppings do feature very heavily on Australian pizza menus. Pepperoni, meat feasts, bacon, pizzas with breakfast toppings (sausage, egg, bacon) BBQ chicken all perform well
Domino's launch Fried Chicken Burger pizza with 'American style cheese' in 2024.



Emerging trends: Consumers are trading down on cost with home pizza making and smaller portions, while still seeking premium quality, gluten-free, and vegan options despite higher prices.

HOME PIZZA PREPARATION/OVENS

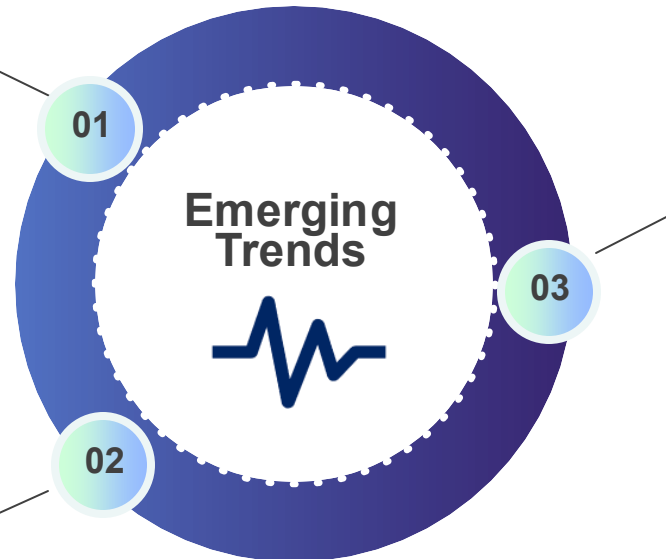
Home pizza making has been an important industry trend as Australians seek to control cost and reduce eating out/takeaways.

Supporting this trend has been an increase in the purchase of home pizza dome ovens, which may be wood fired, gas fired or electric, using pizza blend cheese purchased at retail and added to pre-made pizza bases.

“Our homemade pizzas are definitely the cheapest, healthier option for us”

COST-CONSCIOUSNESS

Consumer price sensitivity and trading down in grocery is a core consideration. However, quality products that command a price premium still have an audience.



HEALTH CONSIDERATION (AT A COST)

Smaller portion sizes

“Would prefer to see more gluten free and vegan options” (Male, 53)

There is a consumer realization that GF and vegan can add significantly to the cost of dine in and delivered pizzas.

Frequency and occasion: Pizza has a strong social and family focus, with consumption average once every two weeks.



Consumer types	%
Younger (under 40)	40%
Older (40+)	60%
Families*	*50%



Consumption frequency	% occasions
Weekly	20%
Monthly	65% (2 times per month)
Less than once per month	15%



Meal type	% occasions
As a snack	10%
As a meal	90%
Lunchtime meal	20%
Evening meal	70%

” Mozzarella and parmesan cheese are always a good ingredient. Burrata is good on the right pizza. Only had a few times but really liked it.” (Female, 52)

- Pizza consumption in Australia is highly social and home-focused, with 55% of Australians enjoying pizza at home and 30% during gatherings with friends or family.
- Domino’s has grown by targeting more eating occasions, especially lunch, through products like My Domino’s Box and Meltzz—making it the fastest-growing QSR for lunch in Australia.
- Sports culture drives pizza demand, with strong synergies around communal viewing of Australian Rules Football and cricket; heavy consumers eat pizza weekly, while the average consumer enjoys it twice a month.

*Families = family and group occasions

Appendix A

Objectives, Research Design & Methodology

OBJECTIVES	SCOPE	METHODOLOGY - PART 1	METHODOLOGY - PART 2
<p>The primary objectives for this research were to:</p> <ul style="list-style-type: none"> • To provide research and landscaping of the global pizza cheese market. • Analyse market size and growth trends in the global pizza cheese and the global pizza industry. • Identify and map key pizza operators in each export market in-scope. • Gain perspectives on consumer drivers and emerging trends. • Identify purchase drivers, trends, barriers and opportunities for US exporters. 	<p>Markets</p> <ul style="list-style-type: none"> • Australia, Chile, China, Dominican Republic, Egypt, Guatemala, Indonesia, Japan, KSA, Mexico, Philippines, South Korea, UAE • Interviews conducted: August to November 2024 • Analysis, quality checks and reporting : December 2024 – July 2025 	<p>Trade data:</p> <ul style="list-style-type: none"> • Import and export data reviewed for main pizza cheese-related HS codes. • USDEC Global Cheese database reviewed and analyzed for all pizza cheese varieties included in the database itemization. <p>Review of secondary data</p> <ul style="list-style-type: none"> • Multiple industry reports, media articles and local trade data consulted for each country. <p>Primary Research: Trade</p> <ul style="list-style-type: none"> • c.165 trade interviews and consultations completed. • Conducted both in-person and virtually. • Interviews were split as follows: Manufacturer/Importer/Distributor: 30%, Retailers: 15%, Foodservice: 45%, Other: 10%. • Specific in-market visits were conducted for Japan (October 2024), Chile (October 2024) and Egypt (September 2024). <p>Primary Research: Consumer</p> <ul style="list-style-type: none"> • 160 consumer connections were conducted including 2 multi-participant focus groups. 	<p>USDEC Inputs</p> <ul style="list-style-type: none"> • USDEC Regional offices interviewed during research phase

Self-Sufficiency Index

Mozzarella Self-Sufficiency Index Explanation:

This measure indicates what proportion of mozzarella for pizza use could be covered by local production to give a sense of reliance on mozzarella imports ongoing.

Mexico

Mexico produces a low amount of mozzarella – the equivalent volume of only 5% of what they need for pizza alone. In this case, there is little prospect of Mexico being able to meet their own mozzarella demand for pizza. This resulted in a high score as sourcing from overseas will be necessary for the foreseeable future.

Australia

Australia produces over double their need for mozzarella in pizza use (210%). Portions of Australia's surplus will be exported while another portion will be used for non-pizza applications. However, because Australia could cover its own mozzarella for pizza usage, it registered a low score against this measure.