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STRATEGIC INSIGHTS

Pizza Cheese in the Middle East and North Africa

A chapter from the Global Pizza Cheese Landscape study

July 2025

Objectives, Research Design & Methodology

OBJECTIVES	SCOPE	METHODOLOGY - PART 1	METHODOLOGY - PART 2
The primary objectives for this research were to: • 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	• United Arab Emirates (UAE), Saudi Arabia (KSA), Egypt • See appendix A for list of all global markets included in the full study. • Interviews conducted: August to November 2024 • Analysis, quality checks and reporting : December 2024 – July 2025	**Trade data:** • Import and export data reviewed for main pizza cheese-related HS codes • USDEC Global Cheese database reviewed and analyzed for all pizza cheese varietals included in the database itemization **Review of secondary data** • Multiple industry reports, media articles and local trade data consulted **Primary Research: Trade** • 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% **Primary Research: Consumer** • Consumer connections were conducted including multi-participant focus groups. See appendix A for the total global count.	**USDEC Inputs** • 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.

A message from the Strategic Insights team

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UAE, KSA, and Egypt in Global Context

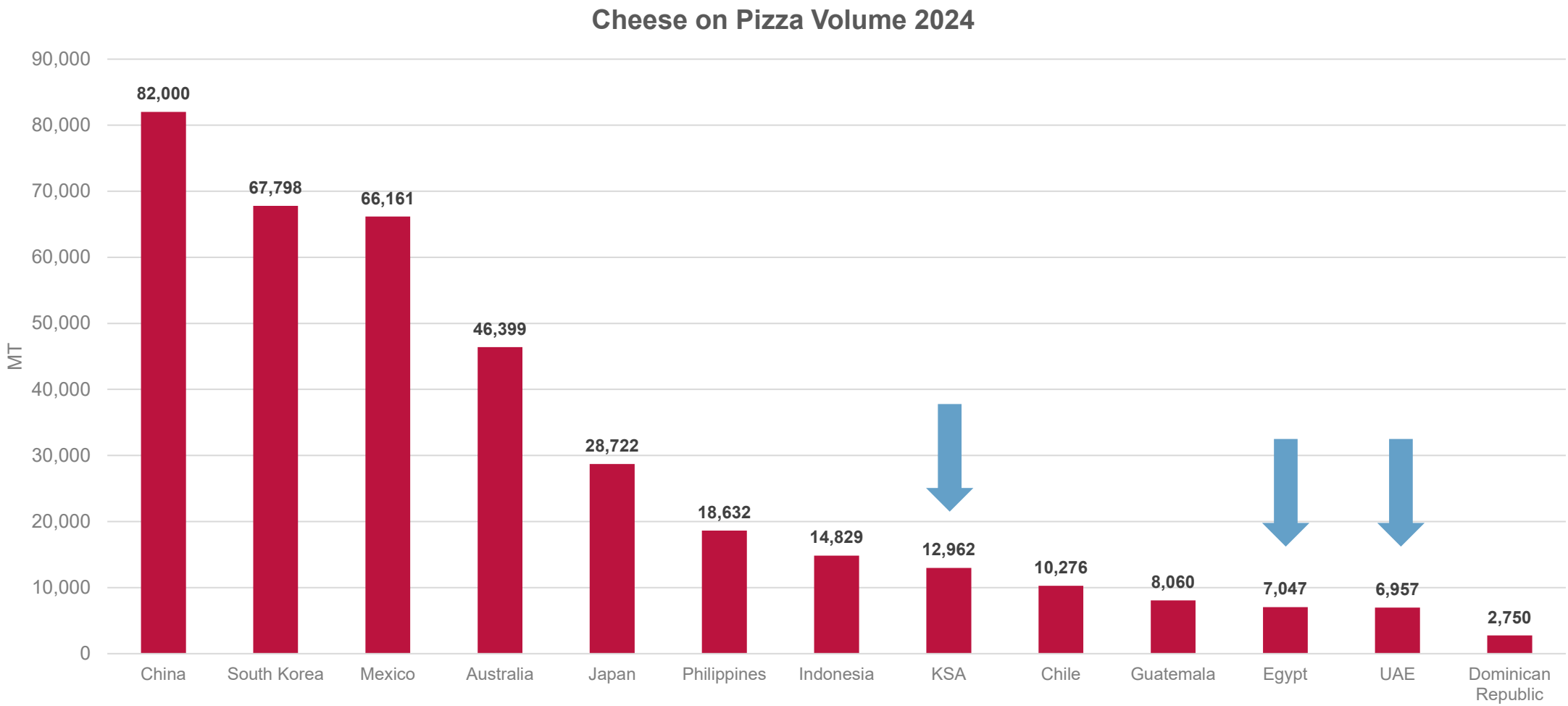


KSA leads the Middle East and North Africa (MENA) region in pizza cheese varietal volume, but the fastest growth is occurring in UAE. Egypt is in decline.

Pizza cheese varietals consumption: 2021-2026 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%

KSA also leads in terms of cheese on pizza volume, followed by Egypt and UAE.



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 for pizza use 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.
Non-Tariff Barriers	As graded by USDEC. Red 1 point through to Green 4 points (*measure scored out of maximum 4) *Disclaimer: Non-Tariff Barrier ratings in this report are relevant to December 2024 and are subject to change.*
Tariff Barriers	As graded by USDEC. Red 1 point through to Green 4 points (*measure scored out of maximum 4) *Disclaimer: Tariff Barrier ratings in this report are relevant to December 2024 and are subject to change.*
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**

MENA offers both near- and long-term potential, with UAE and KSA standing out as the top immediate opportunities for pizza cheese exports.

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 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 varietals. 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 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**

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UAE Market Overview



A booming foodservice and retail industry, driven by inward investment and expansion of the GCC, provides exciting tailwinds for the pizza industry.

Market summary

- UAE has seen surging demand in both the foodservice and retail sectors over the last three years.
- As the food service industry recovered post-COVID, demand for cheese products, especially mozzarella, has grown considerably in the UAE. This demand spike coincided with supply shortages, which placed additional strain on availability.
- Retail is being driven by growing expat communities as more companies invest in the region, with ever more modern shopping malls and higher end modern trade supermarkets (which are increasing in range and in-store offerings) to support affluent residential developments and apartment compounds.
- The diverse demographic in the UAE is well suited to pizza as a versatile food that suits a variety of cultural preferences.
- However, despite this there is still a requirement among many for cost saving, which has seen more analog and processed cheese coming into the market, believed to be via Arla either through Europe or through their production facility in Bahrain.

Pizza and pizza cheese varietal trade and consumption

- Key trends in the pizza market include growing demand for health-conscious options (gluten-free, vegan), customization, fusion flavors, online ordering, and premium gourmet offerings. Sustainability, technology integration, and franchise expansion are also notable trends.
- Outside of the recognized retail and foodservice players, the bakery channel in UAE represents potential for U.S. exporters.
- The UAE pizza market favors bold flavors with strong Middle Eastern and Indian influences, such as shawarma and chicken tikka pizzas.
- The most widely consumed cheeses are cheddar, feta and processed cheese and, as such this is where local producers and key exporter partner countries like Saudi Arabia, through players like Al Marai, focus their time and investment.
- Although there is a reasonable local supply of mozzarella in the UAE, a reliance on imported pizza cheese varietals to cater to the foodservice and retail channels remains and will play well to the strengths of the U.S. exporters.
- As an important regional hub, and as a leading market for being at the forefront of changing consumer trends and preferences in the region, a presence in UAE can help to gain future access to neighboring markets in the GCC.

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Opportunities and Challenges

While challenges like rising regional competition and cost-driven demand persist, opportunities lie in the UAE's strong import reliance, growing retail channels, and continued preference for high-quality U.S. cheese.

Challenges

- Competition from other regional suppliers, particularly Saudi Arabia and Bahrain which may heighten as food security and regional self-sufficiency become an important part of political policy.
- Analog and processed cheese are finding a ready audience across some parts of the value chain with foodservice operators seeking to try and manage costs and margin pressure.

Opportunities

- UAE is a cosmopolitan market with a diverse customer base and a relatively open market access with few trade barriers (particularly non-tariff).
- In 2023 the U.S. was the largest supplier of pizza cheese to UAE, with a 27% volume share, ahead of Turkey and New Zealand in second and third place, respectively. There is an established relationship with direct operator supply from the U.S. and high relevance from a product perspective which seems likely to continue.
- For U.S. pizza cheese exporters, there are significant opportunities in the UAE market. The UAE is a major importer of cheese, with U.S. cheese imports to the UAE growing, reaching around $35 million in 2022.
- U.S. cheese is already very well regarded for both its consistency and its taste so there are few technical barriers to entry from the product perspective.
- Local fast-food restaurants, supermarkets, and food processors are potential customers. The expansion of ready-to-eat and frozen pizza at retail outlets provides opportunities for U.S. pizza cheese exporters to collaborate with regional food makers and distribution companies.
- U.S. cheese producers can supply the expanding need for diverse, high-quality cheese from fast food restaurants, hotels, and supermarkets as well as from modern retailers who continue to expand in both store numbers and in-store offerings such as grab and go and deli counters.

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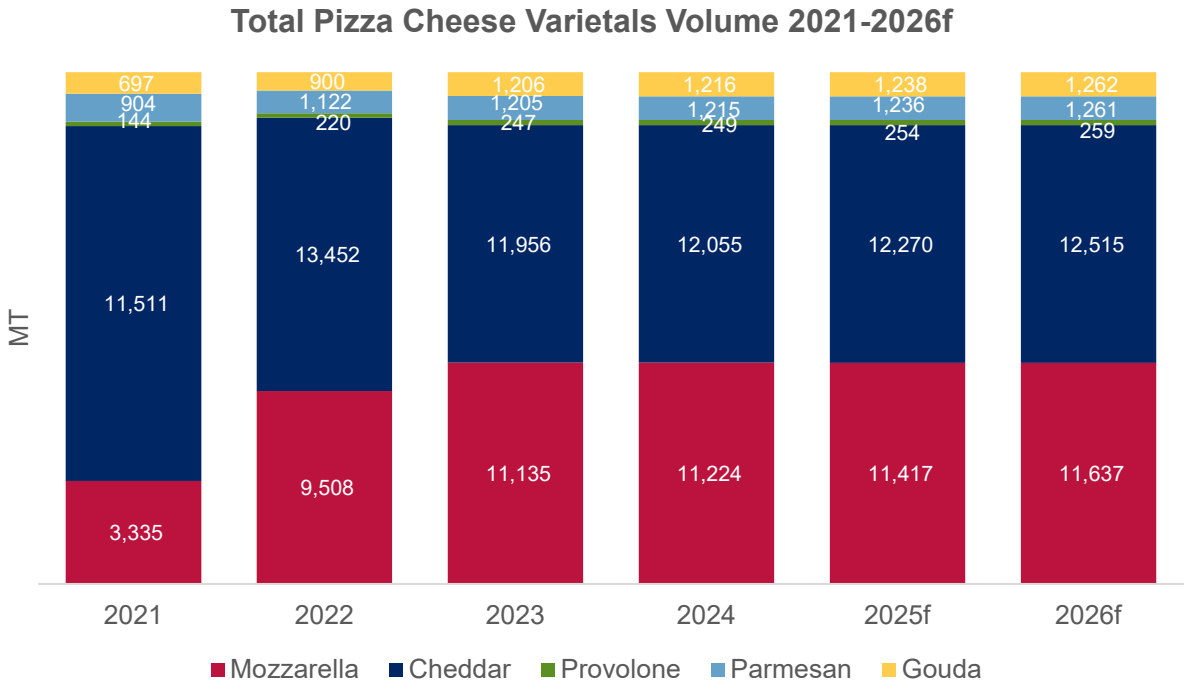
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Pizza Cheese Metrics



Pizza cheese varietals universe: Consumption has grown strongly since 2022, led by mozzarella and foodservice expansion.



Value ($M)	2021	2022	2023	CAGR 2021-23
Total Varietals	84	139	160	37.9%
Cheddar	62	78	76	11.1%
Mozzarella	15	48	66	107.3%
Others	7	13	18	59.0%

2024 total volume

- The total pizza cheese varietals market in 2024 is forecasted at 25,958 MT.
- From 2021 to 2023, mozzarella volume grew by nearly 8,000 MT due to rapid expansion in pizza dine-in and take-away channels.
- Volume growth is expected to slow to a 1.8% CAGR from 2023 to 2026.

2023 market value

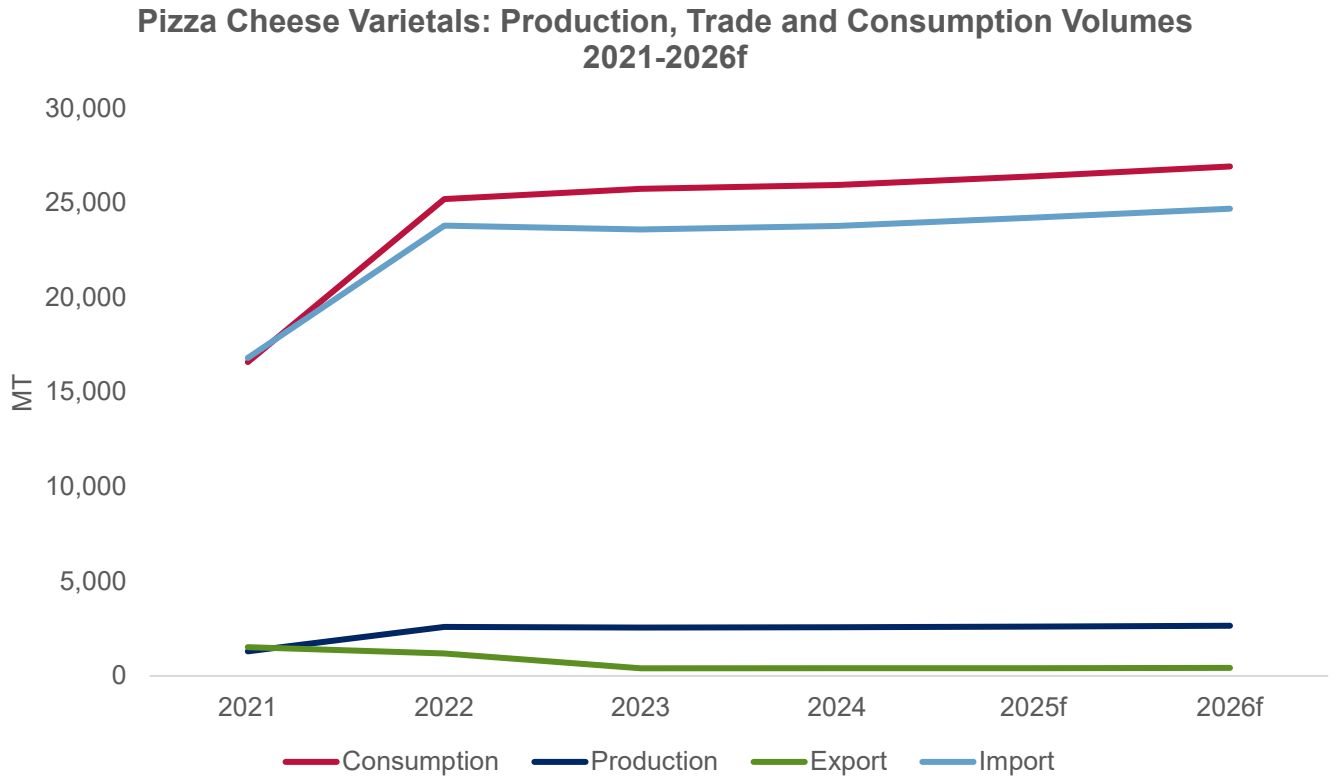
- Based on trade prices, this is a $160 million value category.
- Cheddar represents a large value and volume segment but less than 10% is used for pizza; most cheddar sales occur in retail cut and wrap formats.

Mozzarella trends

- Mozzarella drives value growth, with rising volumes and sharply increasing import/export prices.
- Mozzarella prices rose from about $4,600/ton in 2021 to $5,900/ton in 2023, prompting some buyers to seek cheaper local options and increased use of analog cheeses.

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Supply situation: Locally produced pizza cheese varietals met just 8% of demand in 2024, leaving the market heavily reliant on imports.



Volume MTs	2021	2022	2023	2024	2025	2026
Consumption	16,591	25,202	25,750	25,958	26,415	26,933
Production	1,300	2,598	2,551	2,569	2,608	2,652
Export	1,520	1,194	403	406	412	419
Import	16,811	23,798	23,601	23,796	24,220	24,700

- UAE pizza cheese consumption has stabilized after growth from 2021 to 2022 due to excess stock from prior growth.
- The U.S. is the largest pizza cheese supplier to the UAE, holding a 27% share of fresh and grated/powdered cheese imports. Turkey is the second most important exporter to the region given the similarities in taste preferences between the two countries.
- New Zealand ranks third in exports to the UAE, with a 14% share and about half the volume of U.S. exports.
- Pinar Arabia manufactures mozzarella shreds locally in Abu Dhabi through its HADAF Foods plant since 2019.

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

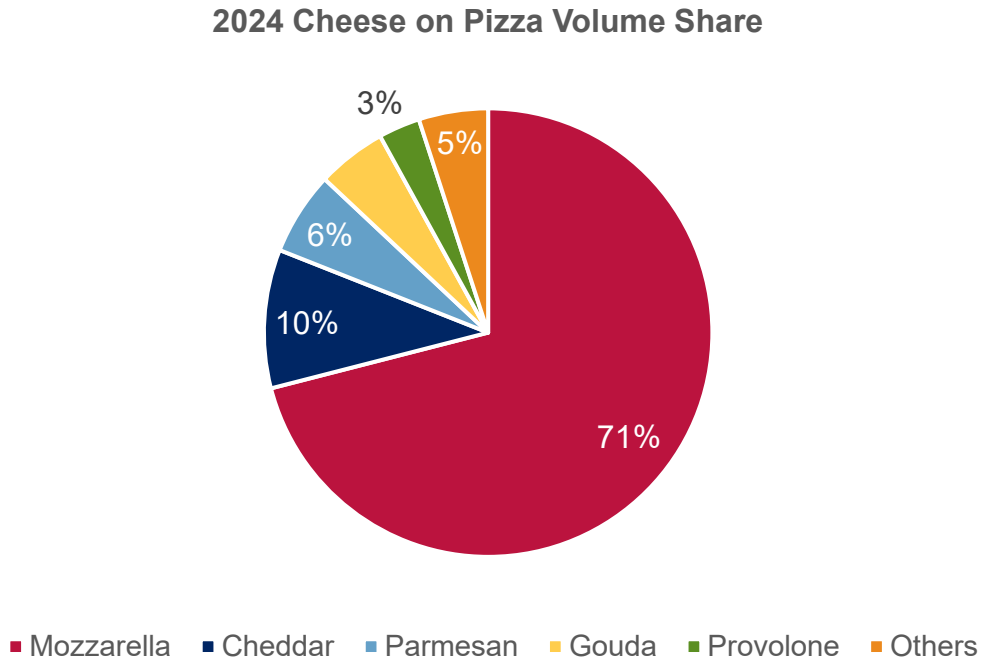
Total Universe of Pizza Cheese Varietals

Cheese on Pizza Only

Cheese on Pizza volumes exclude non-pizza uses

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Varietal mix: Just under 7,000 MT of pizza cheese is used in the UAE, with diverse varietals and a balance between quality demand and analog for cost savings.



Total cheese on pizza use: 6,957 MT

Pizza Cheese Product Mix	2024 Volume (MTs)
Mozzarella	4,940*
Cheddar	696
Parmesan	417
Gouda	348
Provolone	209
Others (incl. Burrata, ricotta, cream)	348

* Includes an estimated 500-1,000 MT analog cheese

- Healthy pizza cheese options like reduced-fat, low-sodium, and plant-based varieties are growing in popularity, boosting mozzarella demand over saltier cheddar.
- Vegan and lactose-free cheeses are also rising due to dietary needs, alongside a shift toward organic and ethically produced dairy driven by sustainability concerns. Precision-fermented animal-free cheeses are expected to gain traction.
- Young, affluent UAE consumers favor innovative, premium products, increasing demand for specialty cheeses like burrata and smoked mozzarella. Additionally, analog cheese—mainly imported from Europe and Bahrain—is also used.

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Finished pizza market: Expat populations and tourism have attracted major international pizza and Italian foodservice chains.

2024: Pizza market* 25,300 MT	Retail: 10%	Foodservice: 85%

Foodservice Operators	International/National	Number of outlets
Domino's Pizza	International	56
Papa Murphy's	International	23
Pizza Hut	International	147
Papa John's	International	86
Pizza Express	International	14
Vanellis	International	17
Sbarro	International	4
Freedom Pizza	National	10
California Pizza Kitchen	International	4
Broccoli Pizza & Pasta	National (but also franchised internationally)	34

- Global pizza franchises like Domino's, Pizza Hut, and Papa John's have expanded significantly, leveraging quick service and delivery to serve the growing expat population (e.g., Pizza Hut outlets grew from 69 in 2016 to 147 in 2024).
- Casual dining chains like Pizza Express and Famoso offer sit-down experiences with diverse menus.
- Artisanal and gourmet pizzerias such as Freedom Pizza focus on high-quality ingredients and unique flavors.
- Online retail platforms like Choithrams and Lulu Webstore boost competition by offering discounts and wider product ranges.
- Ready-to-eat and pre-sliced pizzas support busy lifestyles and drive growth through grab-and-go retail counters.

*Finished pizza market is the volume of pizzas sold. The figures are drawn from both primary and secondary work.
Note: 5% of pizza volume going through other outlets.

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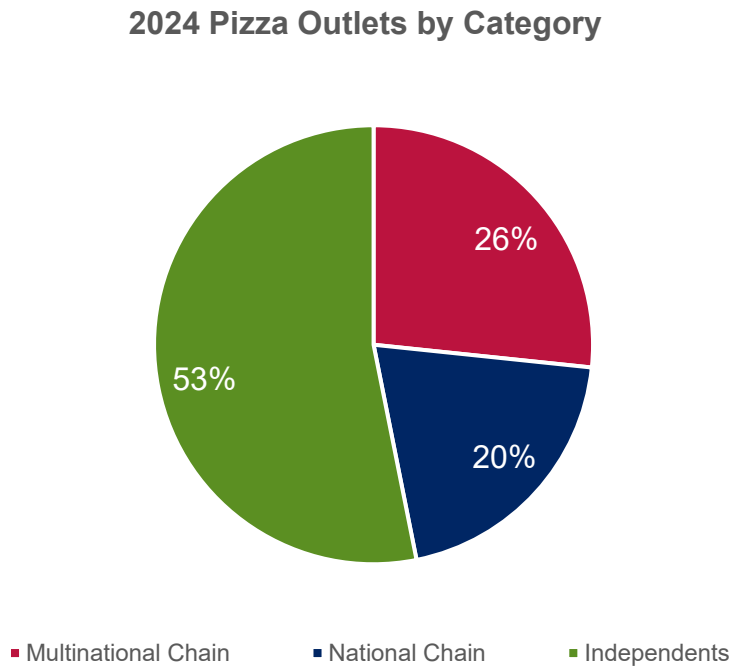
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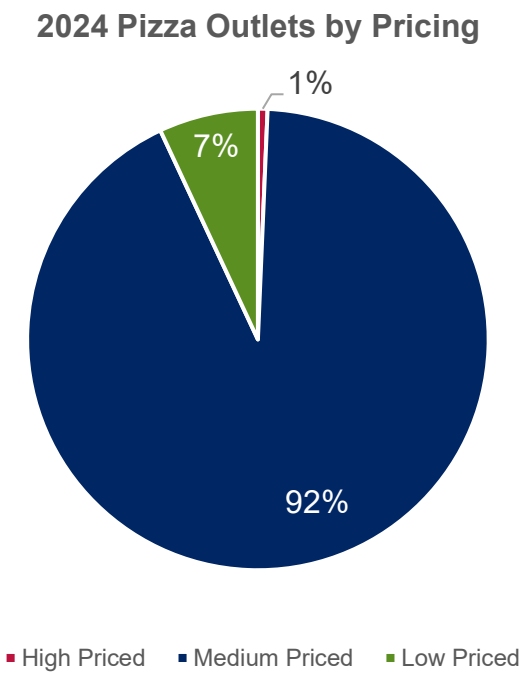
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Buyer Universe, Preferences, and Drivers

Market mapping: Sales are driven by pizza chains and a diverse dining sector, with concentration in Dubai and Abu Dhabi.





Total Pizza Outlets: 1,197	
City	**Rank**
Dubai	1
Abu Dhabi	2
Ras Al Khaimah	3
Al Ain	4
Ajman	5
Sharjah	6

- UAE's pizza market is dominated by international chains, popular with both locals and expats. Altogether, chains make up 46% of outlets but generate about 85% of total pizza sales.
- Independents include full-service Italian restaurants offering traditional pizzas and broader menus, with 7% classified as high-priced demanding quality ingredients.
- Cloud kitchens specializing in delivery-only pizza concepts are well established.
- Buffet restaurants featuring pizza as part of all-you-can-eat options represent an additional growth channel.

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Buyer drivers: Price, performance, and consistency are important, while quality and taste remain the most critical factors.



- High-end outlets prioritize mozzarella's quality, stretchability, and flavor depth, while fast food chains focus on uniform meltability and cost.
- Papa John's holds a 15-20% market share, emphasizing "Better Ingredients" and highlighting the importance of quality to discerning customers.
- Processed shredded cheese is preferred by chains for its longer shelf life, easier storage, and lower operational costs.
- Large UAE chains make centralized purchasing decisions to leverage economies of scale and ensure quality control.
- U.S. cheese is well regarded for consistency and taste, meeting many buyer priorities without significant product barriers.

Buyer preferences: Buyers purchase both fresh and processed mozzarella, though most demand is for processed formats, mainly shredded IQF and block.



Formats:

Demand for mozzarella is in both fresh and processed forms. 33% of consumption is fresh natural mozzarella, with 67% in processed form – mainly shredded IQF and block cheese

Shredded cheese in retail is available for mozzarella, gouda, cheddar and Emmental and has reasonable share of shelf in super/hypermarkets



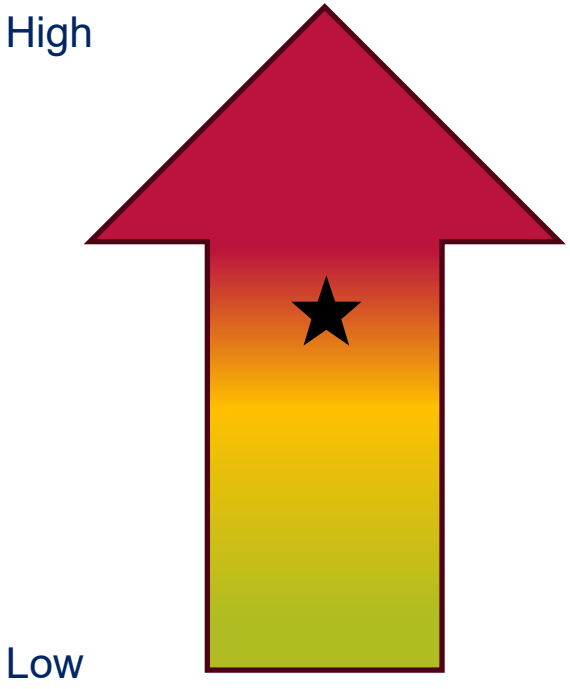
Preferences:

Mozzarella is best for its mild flavor and stretchability. However, mixed cheese blends including parmesan, cheddar, or gouda are gaining popularity for their flavor complexity. UAE cheese consumers like moderate saltiness and avoid extremely salty kinds

Color and Texture: According to research, white to golden-brown melted cheese is desirable, with a preference for a lightly browned, bubbly appearance indicating well-baked quality. Slight yellow color preferred

Price Sensitivity Rating:

MODERATE



- Fresh mozzarella complements processed/shredded cheese in retail and upscale pizza/Italian restaurants.
- Its mild flavor and high meltability make mozzarella the preferred cheese for a wide range of pizza styles, appealing to diverse tastes.
- Mozzarella dominates the fast-food pizza sector, though cheese blends (e.g., mozzarella, cheddar, gouda) are increasingly used to improve flavor and texture.
- While multinational chains maintain consistent core menus controlled by head office, some franchisees suggest local innovations reflecting regional preferences.

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Buyer landscape: Multiple ready-made pizza brands, importers, distributors, and modern trade retailers operate in the UAE market.

Pizza Manufacturers		Importers/Traders/Distributors/Bakery	Retailers	
Company Name	Brand	Company Name	Company Name	Store Count
Nestle	DiGiorno, Stouffer's	Truebell Marketing & Trading LLC	Carrefour	113
McCain Foods	McCain	Hi Foods General Trading LLC	Lulu Hypermarkets	109
Pizza Express	Pizza Express	Chef Middle East LLC	Spinney's	54
Dr.Oetker	Ristorante, Die Pizzamanufaktur	Golden Cheese Foodstuff	Al Meera	>50
Iceland Foods	Own Label	Transmed Overseas Inc.	Union CoOp	27
Americana Group	California Garden	Modern General Trading	Geant	c.15-20
Admiral's Trading LLC (KSA)	Admiral's Wood Fired	MH Enterprises LLC	Online grocery (Talabat, Instashop, Noonm Grocery)	
Gusto Foods	Gusto Italiano	LIFCO		
Sunbulah	Sunbulah	Integrated National Logistics		
		Modern Bakery		

- Retail offers a wide variety of pizzas, including Admiral's Wood Fired margherita bases with 20% mozzarella; many frozen and chilled brands, like Admiral's and Sunbulah, are Saudi-made and imported to the UAE.
- Multiple pizza cheese variants—Emmental, gouda, mozzarella, cheddar—are available as grated/shredded for home use, also popular in dishes like lasagna and salads according to consumer interviews.
- UAE serves as a regional hub with many importers and distributors, offering broad business opportunities for suppliers across the GCC.
- Dubai's cosmopolitan market acts as a strong showcase for launching new foodservice and retail products into the Middle East.

Operator profiles: Domino’s and Freedom Pizza

	Domino's Number of Outlets: 56
Positioning & Activities	Domino’s UAE operates under Alamar Foods, responsible for Domino’s operations across the Middle East, North Africa, and Pakistan. The chain focuses on delivering a variety of pizzas, featuring customization options for toppings, crusts, and sides Mass-market, aiming at a broad audience with accessible price points and efficient delivery services Primarily delivery-focused, supporting takeout and limited dine-in options depending on the location Domino’s UAE’s menu emphasizes popular classic pizzas with specialty crusts and side offerings like garlic bread, wings, and desserts Frequent promotions include “Buy One Get One Free” (BOGOF) and seasonal deals Digital platforms are heavily utilized for customer engagement, offering app-based discounts
Performance	Alamar in Q2 2024 had total sales revenues of 226 mn SAR which was a decline of 10% on a year on year basis. However store numbers (across both Domino's and Dunkin Donuts) stood at 692 which was an increase of 3% year on year. Domino's stores across the whole business/region stood at 629 in Q2 2024, and increase of 18 stores year on year
Pizza cheese, requirements and sourcing	Annual Cheese Volume by Type: not provided but estimated at between 500 and 1,000 MT per annum Mozzarella: Predominant varietal and over 90% of total cheese volume Additional varieties: Feta and American cheese Product Forms Purchased: Domino’s generally utilizes shredded cheese for ease in pizza preparation, ensuring consistent distribution across products Cheese Sources: It is understood that Domino’s UAE sources cheese from U.S. Sourcing Process: Decisions are made primarily at the corporate level to benefit from bulk purchasing and maintain quality consistency Key Purchase Decision Drivers: Quality: Maintaining consistent taste and melt properties Cost-effectiveness: Ensuring product affordability Challenges: Challenges include fluctuating costs and supply chain stability. There is interest in sustainable packaging innovations to further enhance brand image Product Specifications and Preferences: Mozzarella remains the primary cheese due to its texture and compatibility with the menu Domino’s UAE locations are multilingual, catering to both English and Arabic speakers. The brand has innovated in delivery strategies, emphasizing speed in densely populated areas like Dubai’s Marina
Additional information	Ovens: Primarily convection and deck ovens, selected to ensure efficient cooking times and quality Refrigeration Capacity: Varied by location, designed to store ingredients in bulk to support high turnover and freshness

	Freedom Pizza Number of Outlets: 10
Positioning & Activities	Freedom Pizza is a premium pizza chain in the UAE, recognized for using fresh, locally sourced, and organic ingredients where possible. The chain specializes in artisanal pizzas, emphasizing sustainability, health-conscious options, and environmental responsibility Positioned as a gourmet and specialty brand targeting customers who seek high-quality, eco-conscious, and health-focused food options, catering to a premium niche rather than the mass market Operates as a hybrid, with a focus on takeout and delivery, complemented by limited dine-in options. Delivery is a significant part of its business model, supported by a strong online presence
Performance	While specific turnover figures are not available, Freedom Pizza has seen steady growth in the UAE, with annual growth rates of approximately 5-10% over recent years. The rise in demand for delivery services and health-conscious dining options has contributed to this growth
Pizza cheese, requirements and sourcing	Total annual cheese volumes are estimated at between 50 and 100 MT per annum. Mozzarella 75%, Provolone 10%, Cheddar 5%, Parmesan 5%, Cream Cheese 3%, Others (Gorgonzola, Ciliegine) 2% Product Forms Purchased: Primarily purchases cheese in blocks and shreds. Some varieties may be sourced frozen depending on supply chain and storage needs Cheese Sources: Sources cheese locally and internationally, with suppliers chosen based on quality and pricing Sourcing Process: Sourcing decisions are generally made at the head office level, focusing on quality, sustainability, and cost-effectiveness Key Purchase Decision Drivers: Price: Competitive pricing for bulk purchases Quality: Consistency with high standards Performance: Cheese that melts well, has good stretch, and holds flavor Taste: Complements gourmet-style pizzas Sustainability: Responsibly sourced, with eco-friendly packaging Challenges: Maintaining quality while controlling costs poses a challenge. Logistical issues related to importing specific cheese varieties can arise, and the brand is interested in innovations such as organic and plant-based cheeses Product Specifications and Preferences: Mozzarella is prioritized for its texture and melt quality. Cheddar and Parmesan are also important for specialty pizzas, and analogue cheese may be used selectively for cost-effectiveness Beyond ingredients, Freedom Pizza actively participates in environmental initiatives and community engagement to reduce its carbon footprint
Additional information	Focused on healthier pizza options, including multigrain dough and vegan-friendly choices, catering to health-conscious consumers Ovens: Deck ovens, chosen for their ability to create high-quality crusts and even baking suitable for gourmet-style pizzas Refrigeration Capacity: Equipped with commercial-grade refrigeration units to store large ingredient volumes, including cheese

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Operator profiles: Pizza Hut & Papa John's

	Pizza Hut Number of Outlets: 147
Positioning & Activities	Pizza Hut operates in the UAE under the Americana Group, a major food company in the MENA region. The chain offers a wide range of pizzas, side dishes, and beverages through dine-in, takeout, and delivery channels Pizza Hut positions itself as a mass-market brand, targeting a broad audience with quality pizzas at reasonable prices. The menu combines traditional options with innovative products to appeal to diverse tastes Hybrid model, with significant emphasis on dine-in, takeout, and delivery services Popular items include the Super Limo Pizza, Supreme Family Meals, and specialty pizzas like Peri Peri Chicken and BBQ Chicken Ranch. Pizza Hut UAE also offers combo deals with sides like garlic bread and potato wedges Pizza Hut UAE frequently promotes offers such as "Buy 1 Get 1 Free" and "Wow Triples" (three medium pizzas for AED 99), alongside app-exclusive discounts and free delivery options via platforms like Noon Food, Careem Food, and Talabat
Performance	In FY 2023, Pizza Hut contributed approximately 11.7% of Americana Restaurants' revenues, totalling $281.3 million, with a 6.4% revenue growth
Pizza cheese, requirements and sourcing	Cheese volumes not disclosed but annual volume estimated at 1,500 - 2,000 MT of which over 95% will be mozzarella Product Forms Purchased: Pizza Hut primarily uses pre-shredded and block cheese, facilitating handling and storage for high-volume operations Cheese Sources: Major supply is believed to be from the United States Sourcing Process: Sourcing decisions are handled at the corporate level, optimizing economies of scale and ensuring consistent quality across locations Key Purchase Decision Drivers: Quality: Consistency in taste and melting properties Cost-effectiveness: Efficient bulk purchasing Supply Chain Stability: Regular supply for uninterrupted operations Challenges: Challenges include fluctuating prices, supply chain disruptions, and maintaining consistent cheese quality. There is an interest in sustainable packaging and improved supply chain efficiency Product Specifications and Preferences: Mozzarella is the preferred cheese due to its melting properties, flavor, and compatibility with Pizza Hut's recipes Ovens: Conveyor ovens are standard in Pizza Hut UAE locations, chosen for their high capacity and uniform cooking, essential for fast-food operations Refrigeration Capacity: Pizza Hut outlets use large refrigeration units to store cheese, vegetables, and other perishables, supporting high-volume purchasing and freshness
Additional information	N/A

	Papa John's Number of Outlets: 86
Positioning & Activities	Papa John's positions itself as a premium brand within the quick-service restaurant (QSR) sector, differentiating from competitors with its "Better Ingredients, Better Pizza" ethos The brand offers a hybrid model, combining dine-in, takeout, and delivery to cater to diverse customer preferences Papa John's UAE focuses on high-quality pizzas, with options like the Grilled Cheddar Pizza, which features a cheddar blend for a unique flavor. The menu emphasizes premium ingredients and innovative twists on classic offerings LTOs and special promotions include the "Back to School" deal (buy a large pizza, get a medium and small pizza free) and the "Mix Box" (three medium pizzas at a discounted rate). These offers are accessible in-store and through the mobile app
Performance	Information not disclosed although during research fieldwork some individual outlets claim strong double digit growth in sales in 2023/24
Pizza cheese, requirements and sourcing	Cheese volumes not provided but estimated annual volume of 900 - 1100MT Mozzarella 75%, Cheddar 15%, Parmesan 5%, Vegan Cheese 5%. Cheddar cheese is much more strongly emphasized across multiple menu items than in the other major international chains in this country Product Forms Purchased: Papa John's primarily uses mozzarella without fillers to ensure quality, favoring blocks and shreds for easy handling and consistency across stores Cheese Sources: Supply believed to be predominantly from the U.S., ensuring standardized quality across global markets. Cheese is imported based on the parent company's sourcing strategy to maintain brand consistency, with a focus on premium Italian-style cheese. Sourcing Process: Sourcing is directed by the parent company to maintain global quality standards. This process emphasizes "Better Ingredients" to support the brand's core values. Key Purchase Decision Drivers: Quality: Consistency in flavor and texture Sustainability: Responsibly sourced ingredients Product Performance: Melt properties and taste that align with premium standards Challenges: Papa John's aims to maintain a stable supply chain for premium ingredients The brand is exploring vegan pizza innovations to meet diverse dietary needs and expand its market reach
Additional information	Papa John's UAE is part of PJP Investments Group, which operates 86 Papa John's locations across the UAE, as well as additional outlets in Saudi Arabia, Jordan, and Iraq

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Consumer Preferences and Trends

Consumer drivers: Convenience, delivery, and premium ingredients drive demand, with local flavors and cheese blends shaping preferences.

CONVENIENCE

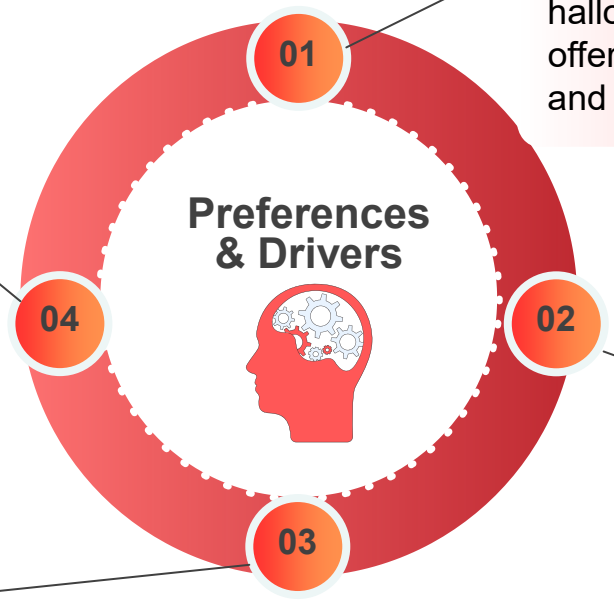
Chilled pizzas and meal kits cater to the growing demand for convenience. They provide time-saving solutions for busy households while offering the flexibility of semi-prepared meals.

Pizza delivery has surged, with a large developed home delivered network evident in major cities like Dubai.

PREMIUM INGREDIENTS AND CUSTOMISATION

Demand for premium ingredients drives pizza consumption growth.

Market-specific variations use local toppings like za'atar and seafood, and regional cheese blends like mozzarella with halloumi or feta. Customization and innovative seasonal offerings are also common, catering to the diverse population and local tastes.



RISING GOURMET

As tourism and hospitality rebound, luxury hotels and premium restaurants are driving demand for higher-end cheese types .

E-COMMERCE

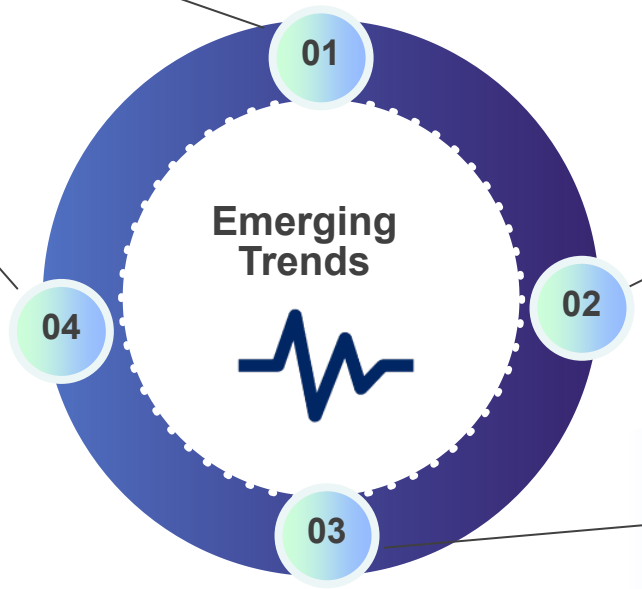
The surge in online grocery shopping and food delivery services has expanded the reach of non-traditional pizza formats. This trend has enabled new segments like pizza-making kits and chilled dough to thrive as consumers embrace home-cooked meal solutions.

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Emerging trends: Growth in global pizza franchises is driving demand for customization, health-focused options, and unique dining experiences.

TOURISTS & EXPATS

The diverse population and thriving tourism industry boost food service consumption, especially for products like pizza and specialty cheeses.
This has led to expansion of global pizza franchises across the ‘big 3’.



PERSONALIZATION

Customers want pizzas with personalized cheese blends and toppings.
Customization with halal and vegetable toppings.

HEALTH & ORGANIC

There is a growing emphasis on sustainable sourcing and organic options, catering to health-conscious consumers.
Growing awareness around health and wellness is leading to increased demand for low-fat, organic, and plant-based cheese options, reflecting a broader global trend.

UNIQUE EXPERIENCES

As dining out becomes more of a social event, there’s a focus on unique experiences like wood-fired ovens, live kitchen views, and custom toppings.

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Frequency and occasion: Over 90% of the UAE population consumes pizza, skewing younger, with frequency driven by delivery, social snacking, and special occasions like Ramadan.

Consumer types	%
Younger (Under 40)	70%
Older (40+)	30%

Consumption frequency	% occasions
Daily	5%
Weekly	25%
Monthly	55%
Less than once per month	15%

Meal type	% occasions
As a snack	16%
As a meal	69%
Lunchtime meal	32%
Evening meal	37%
Special occasion	15%

- Over 90% of the UAE population consumes pizza at least once per year, owing to the diverse population of expatriates and the international food culture in the country.
- Penetration is higher than in nearby KSA for example.
- Pizza is a popular convenience food and social snack in the UAE. Delivery has grown, especially post-pandemic.
- Special occasions capture significant market share, with distribution via pizza trucks during Ramadan festivals.
- The ability to customize pizzas with halal toppings, vegetarian options, and a mix of traditional and modern flavors appeals to wider ranging consumer needs.
- This ensures high consumption levels across the full range of demographic groups.

”We have noted rising demand for personalization among our customers”
(General Manager, Pizza Hut)

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KSA Market Overview



Pizza cheese varietals in KSA are growing due to urbanization, westernization, a young affluent population, and rising demand fueled by international pizza chains and online delivery platforms.

Market summary

- KSA has traditionally relied on a combination of locally source pizza cheese and imports. Despite a drive towards localization of ingredients and regional food security, there is still a large emphasis on product sourced from abroad, with the U.S. as a major supplier.
- Increases in tourism and the hospitality sector, driven by Vision 2030, have led to greater cheese consumption in hotels and catering services. This will expand further with the announcement in December 2024 that Saudi Arabia will host the men's football World Cup in 2034.
- There is a positive background of growth in the pizza market although it is yet to reach full maturity so there is likely to be further market headroom .

Pizza and pizza cheese varietal trade and consumption

- Penetration of pizza, estimated at 60-70% of the population, indicates further potential, with likely expansion of the pizza and pizza cheese varietal category in the coming years.
- As the sector develops, so consumer demands and expectations become more complex. One of the impacts of this is a growth in experimentation with different pizza cheese blends. Parmesan and Emmental are beginning to increase in usage.
- However, health-conscious trends and preferences for lower-fat, organic, or plant-based alternatives could pose a potential challenge to traditional pizza cheese varietal consumption.
- Economic fluctuations and pricing sensitivities related to imported cheese also impact consumer purchase decisions – which explains increasing popularity of D2C options like pizza meal kits for at-home preparation for example.
- Retail blends: Retailers are selling more frozen pizzas topped with multiple cheeses, especially to busy families and young professionals.
- Foodservice operators are seeking differentiation through innovation. The introduction of innovative cheese blends is fueled by pizza chains' efforts to stand out in a competitive market, appealing to consumers who seek new and exciting flavors.

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Opportunities and Challenges

While competition, pricing, and trade barriers pose challenges, Saudi Arabia offers growth through rising demand for Western foods, halal cheese, and expanding foodservice channels.

Challenges

- Dairy producers are responding to consumer demand for locally made, halal-certified cheeses. This is increasing competition faced by U.S. exporters.
- If seen as high priced, U.S. cheese may struggle to compete with local or European sources. U.S. exporters with close relationships, marketing support (such trade missions) are more likely to succeed in KSA.
- Moderate tariff and non-tariff barriers do exist although, while not as straightforward as some other markets, these are not seen as insurmountable with access generally fair/positive.

Opportunities

- Increasing preference for Western fast food, particularly pizzas, is driving growth so there is a positive overall industry backdrop to explore future opportunities.
- Companies that manufacture frozen or pre-prepared meals (such as pizza kits and ready-made pizzas) for retail and wholesale distribution represent an opportunity.
- Booming Cloud Kitchens & E-commerce Food Sector: Growing popularity of food delivery platforms encourages demand for pizza ingredients like mozzarella cheese.
- With higher income levels, consumers can afford premium products, increasing demand for higher quality imported U.S. pizza cheese.
- New hotels and resorts aligned with Vision 2030 require reliable cheese suppliers for diverse menu offerings.
- A busy lifestyle is increasing demand for frozen and pre-prepared meals, encouraging bulk pizza cheese consumption.
- The U.S. may gain an advantage by targeting QSRs, hotels, and cafés with private-label solutions, value-added items, and competitive pricing. Offer halal-certified items and adapt to local tastes like mild flavor profiles to boost market penetration.
- Strategic viability of direct dealings to cut out traders and better manage margins throughout the value chain could also be explored.

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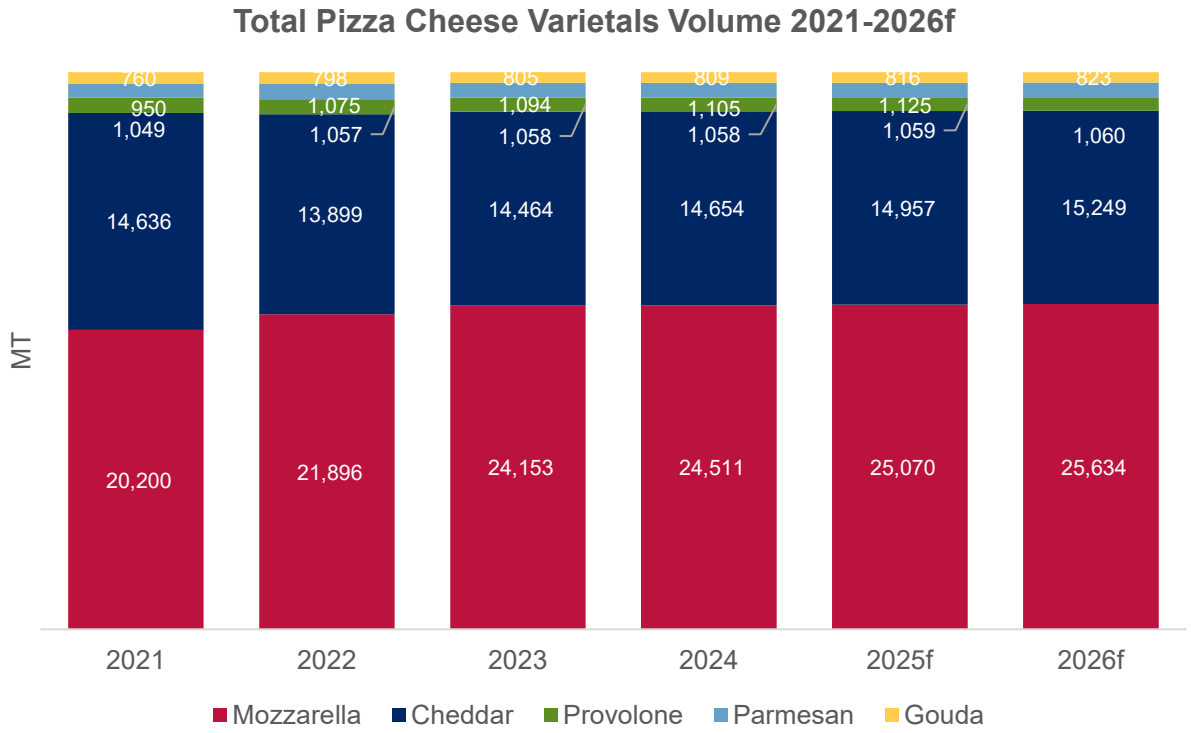
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Pizza Cheese Metrics



Pizza cheese varietals universe: All main varietals are present, but 95% of total volumes is captured by mozzarella and cheddar.



Value ($M)	2021	2022	2023	CAGR 2021-23
Total Varietals	138	166	180	14.4%
Cheddar	62	68	68	5.1%
Mozzarella	64	78	94	21.4%
Others	12	20	18	21.9%

2024 total volume

- The total pizza cheese volume in 2024 was forecasted at just over 42,000 metric tons.
- The market shows limited varietal diversity, with most volume concentrated in cheddar and mozzarella.
- Forecasts suggest relatively stable cheese varietal shares, with gradual growth across all types.

2023 market value

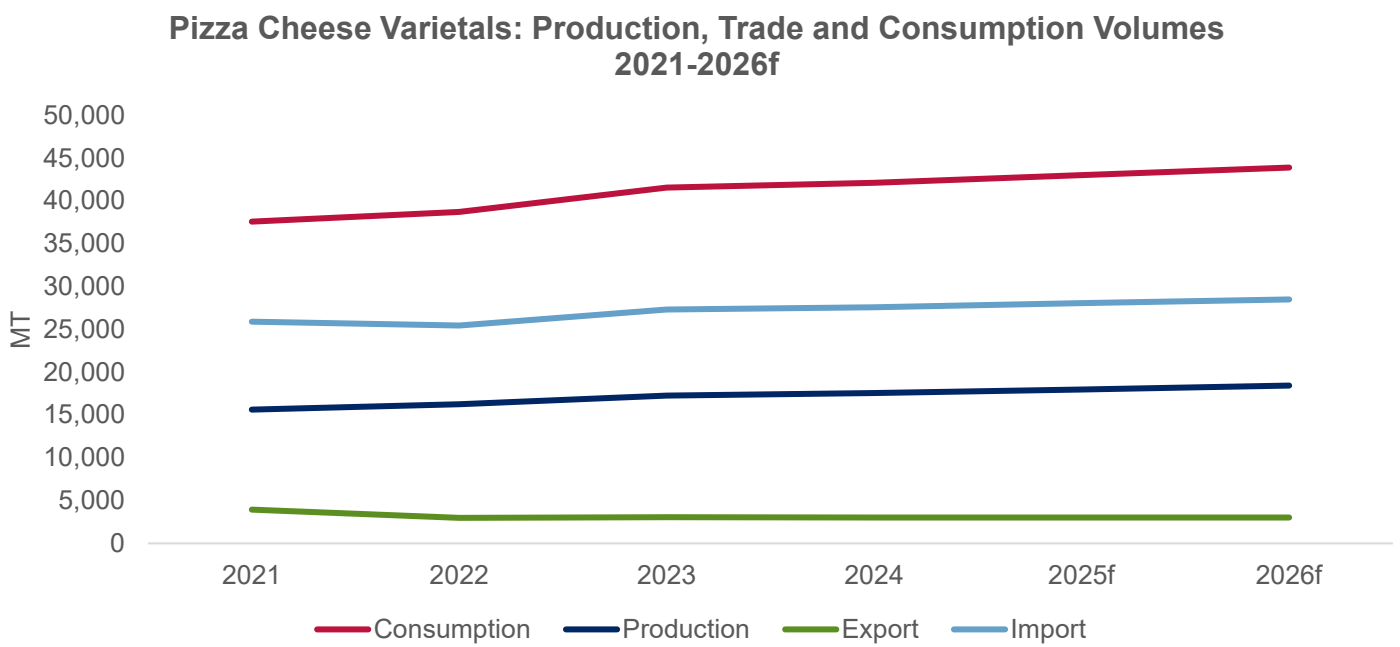
- Based on trade prices, the total market value of all varietals reached $180 million in 2023, with a 14.4% CAGR during the review period.

Mozzarella Trends

- The rise in mozzarella prices drove value growth—prices increased from $3,150/MT in 2021 to $3,890/MT in 2023.
- Saudi Arabia (KSA) is largely self-sufficient in mozzarella, producing 70% of what it consumed in 2023, but has no domestic cheddar production.

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Supply situation: Global supply chain challenges reduced imports in 2022, but imports rebounded in 2023; in 2024, local production supplied about 35% of total consumption.



Volume MTs	2021	2022	2023	2024	2025	2026
Consumption	37,594	38,724	41,573	42,137	43,028	43,910
Production	15,631	16,253	17,287	17,568	17,997	18,441
Export	3,948	2,987	3,048	3,034	3,044	3,034
Import	25,911	25,457	27,335	27,603	28,074	28,503

- Saudi Arabia's pizza cheese supply has faced challenges over the past two years due to global disruptions, import restrictions, and rising freight costs.
- Mozzarella availability and pricing were particularly affected, while local and regional cheeses remained more stable.
- KSA has prioritized self-sufficiency and increased local production, supporting supply across the GCC.
- Imports declined slightly in 2022 but rebounded in 2023.
- The supply network remains fragmented, with the U.S. holding under 15% market share.

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

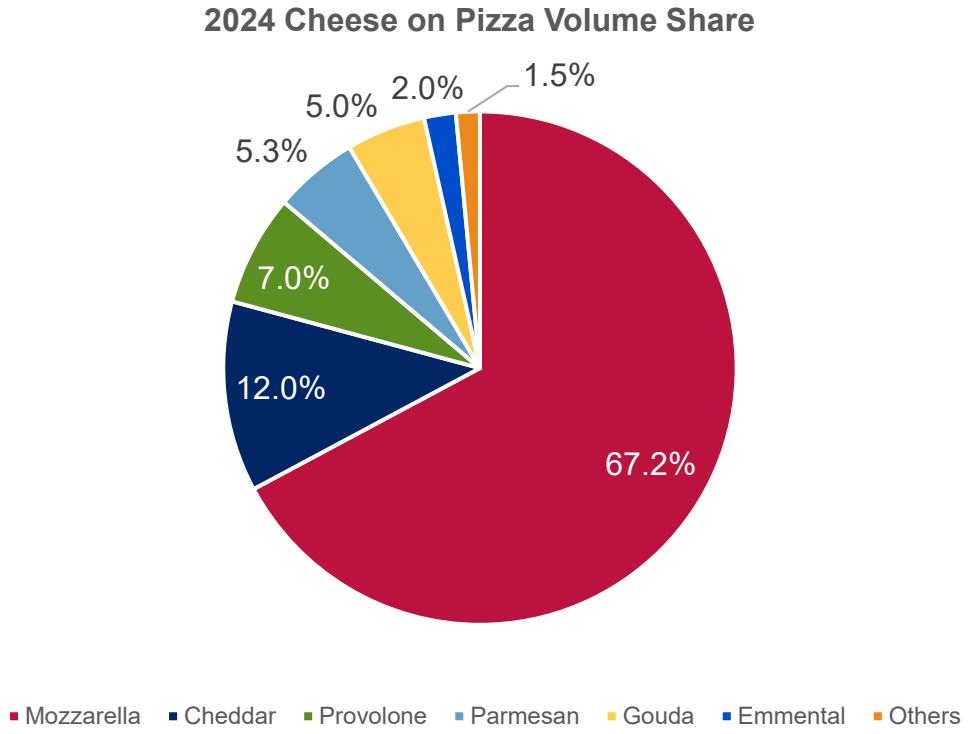
Total Universe of Pizza Cheese Varietals

Cheese on Pizza Only

Cheese on Pizza volumes exclude non-pizza uses

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Varietal mix: Mozzarella is the most frequently used pizza cheese in KSA due to its moderate flavor and meltability, with cheddar, parmesan, emmental, provolone, and cream cheese also common.



Total cheese on pizza use: 12,962 MT

Pizza Cheese Product Mix	2024 Volume (MTs)
Mozzarella	8,709*
Cheddar	1,555
Provolone	907
Parmesan	689
Gouda	648
Emmental	259
(Others incl. cream cheese, feta)	194*

*totals including analog cheese through local producers such as NADEC

- High-end restaurants and pizza franchises in KSA are experimenting with cheese blends like mozzarella-cheddar or mozzarella-gouda to cater to diverse tastes.
- Mozzarella's share of the pizza cheese market has declined from 78% in 2015 to 67.2% in 2024, opening opportunities for alternative cheese types.
- White cheese is widely consumed within KSA, hence the appearance of feta across pizza menu items at operators such as Oregano Pizzeria.

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Finished pizza market: At 46,400 MT, the KSA market is smaller than the UAE but is expanding rapidly with rising consumer demand.

2024: Pizza market* 46,400 MT	Retail: 12%	Foodservice: 87%

Foodservice Operators	International/National	Number of outlets
Domino's Pizza	International	295
Little Caesars	International	85
Pizza Hut	International	80
Papa John's	International	31
Maestro Pizza	National	168
Funtime Pizza	National	10
Sbarro	International	16
Lorenzo Pizza	National	45
Oregano Pizzeria	National	25

- The pizza market in KSA is still developing, with major international chains dominating due to strong brand loyalty among youth.
- Local and regional players like Maestro Pizza (approximately 170 outlets) are expanding rapidly through competitive pricing and local flavors, while gourmet pizzerias cater to affluent consumers seeking premium options and customizable options.
- About two-thirds of pizza sales come from dedicated pizza outlets, with the rest from broader-menu restaurants (i.e. Italian or other Western restaurants).
- Hotels, caterers, and casual dining venues also drive demand, while retail channels play a key role in supplying both households and small foodservice operators.

*Finished pizza market is the volume of pizzas sold. The figures are drawn from both primary and secondary work.
Note: 1-2% of pizza volume going through other outlets

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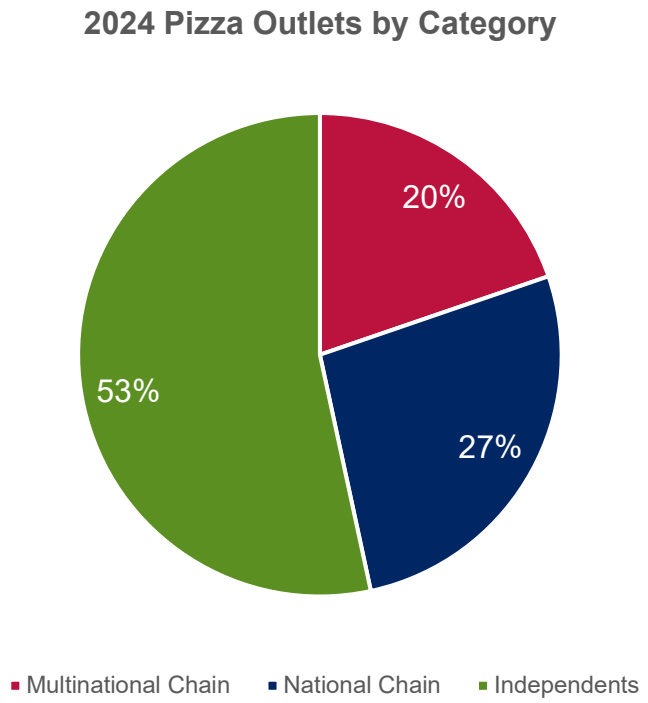
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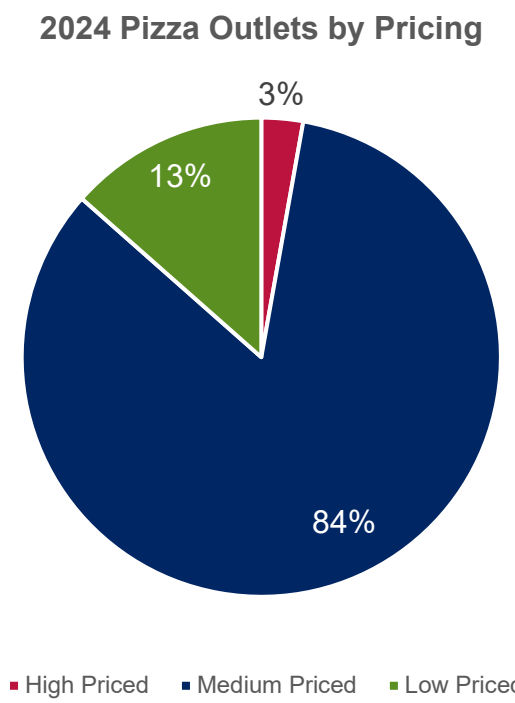
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Buyer Universe, Preferences, and Drivers

Market mapping: Although Domino's and Pizza Hut are market leaders, the presence of higher-end outlets is growing.





Total Pizza Outlets: **2,473**

City	Rank
Riyadh	1
Jeddah	2
Medina	3
Al Hofuf	4
Mecca	5
Ta'if	6
Dammam	7
Tabuk	8
Khamis	9
Buraydah	10

Pizza outlet locations: Riyadh



- Riyadh is the hub of pizza, fast food and QSR in Saudi Arabia, with the highest concentration of pizza outlets—47% of those sampled were located there.
- Multinational chains account for 20% of outlets and have significantly higher sales volumes than local or independent players.
- While most of the market is medium-priced, 13% of outlets are in the high-end segment, reflecting growing demand for gourmet offerings and higher-end, natural cheese.

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Buyer drivers: Shifting consumer sentiment is shaping buyer requirements, with halal certification, quality, and taste as key demands.



- Shifting consumer expectations influence buyer decisions; price remains important, but buyers also require quality, taste, service, and route to market.
- Demand for frozen and ready-to-eat pizzas is expanding, driving need for consistent, high-quality cheese.
- Taste profiles can be a barrier in KSA; consumers prefer mildly salty, stretchy mozzarella over strong or pungent varieties.
- Local preferences, shaped by Western fast food and Middle Eastern cuisine, require a balance of authentic Italian traits with regional tastes.
- Companies buy locally to reduce costs, strengthen supply chains, and meet demand for local products and lower carbon footprints.

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Buyer preferences: Price remains a factor, but this market is less sensitive than others. Supply is either via imported/pre-shredded or locally converted.



Formats:

Cheese is either imported direct and pre-prepared as IQF shreds or cubes or imported as blocks and then shredded in market.

Shredded, bagged format is most common for domestic/locally produced pizza cheese varietal brands (mozzarella and blends) sold through the retail channel.

Convenience-focused consumers are driving demand for pre-shredded and easy-melt options, particularly for use in home cooking.



Preferences:

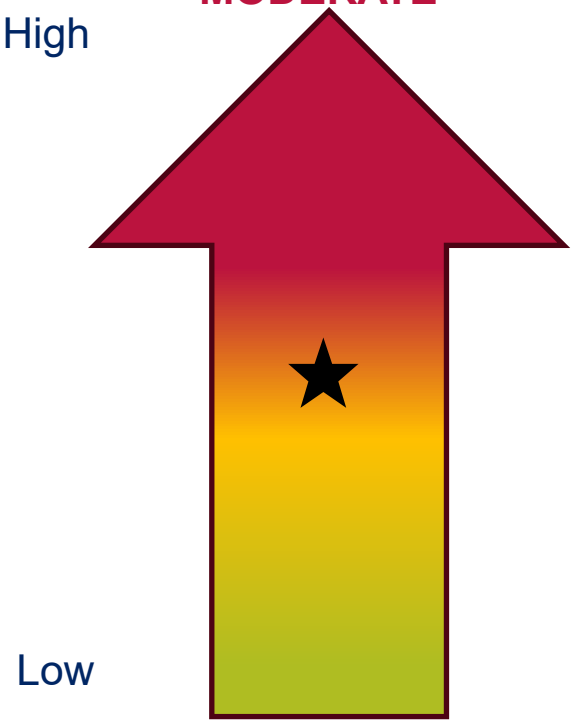
Cheese Type: Consumers favor a blend of mozzarella with cheddar or parmesan to balance creaminess with sharper notes.

Salt Content: Moderately salted cheese is preferred, with demand for reduced-sodium options growing among health-conscious consumers.

Color Preferences: Pale to golden brown when melted, with high appeal for visual stretch and bubbling on baked pizzas.

Price Sensitivity Rating:

MODERATE



- High-quality mozzarella and specialty cheeses like gouda or cheddar blends are favored for pizza, especially as demand grows for cheese that maintains texture and flavor during delivery.
- To manage dairy cost variability, blends often include lower-cost cheeses like processed cheddar to sustain profitability.
- Custom cheese blends help cater to regional tastes by mixing familiar flavors with international trends, while reduced-fat and specialty cheese blends gain popularity for offering health benefits without compromising taste.

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Buyer landscape: There is a broad range of buyers, with branded and own label frozen/chilled pizza available across multiple retail channels.

Pizza Manufacturers		Importers/Traders/Distributors	Retailers	
Company Name	Brand	Company Name	Company Name	Store Count
Dr. Oetker	Ristorante	Gulf Central Co. Ltd	Carrefour	c.100
Sunbullah Group	Sunbullah	Fast Food Marketers Company Ltd	Tamimi Markets	40
Al Karamah Dough Production Company	Al Karamah	Daily Food Company	Lulu Hypermarkets	c.200
Carrefour	Carrefour	Sanabel Al-Salam Food Industries Co.	Danube	47
Al Munajem Foods	Dari	Al Munajem Foods	Othaim Market	265
		Gulf Food Industries	Panda Supermarkets	c.200
		Al Faisaliah Group		
		Sari Food Company		
		Saudi Dairy & Foodstuff (SADAFCO)		
		Food Nation		
		Classic Fine Foods		
		NAQUEL Express		
		BinDawood Wholesale		

- In KSA's fast-paced market, frozen and ready-made pizzas with high-quality cheese are increasingly popular among time-pressed consumers. Both local and international brands are widely available through expanding modern retail channels like hypermarkets and supermarkets vs. traditional retail channels.
- Key players such as Al Munajem Foods operate across the value chain, importing, distributing, and offering ready meals and pizzas under the Dari brand. Their use of cheese cubes—mozzarella, cheddar, gouda, and Emmental—in multiple pizza flavors illustrates a strategic response to evolving consumer lifestyles and preferences.

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Operator profiles: Domino’s & Maestro Pizza

	Domino's Pizza Number of Outlets: 295
Positioning & Activities	Domino’s in Saudi Arabia is part of a global chain, focusing on pizza and related products, and operates under Alamar Foods in the region Positioned as a mass-market brand, emphasizing value and quick service Primarily take-out and delivery, with limited dine-in options Domino’s KSA specializes in pizzas tailored for delivery, with adaptations for local preferences Domino’s frequently offers discounts and LTOs, leveraging digital channels to drive engagement
Performance	Approximately SAR 200 million in annual revenue. Domino’s has experienced annual growth of 10-15%, driven by rising demand for delivery and online ordering services
Pizza cheese, requirements and sourcing	Annual Cheese Volume across all outlets estimated at 3,000 to 3,500 MT Product Forms Purchased: Typically uses shredded and block cheese Cheese Sources: Sources cheese both locally and through partnerships with international suppliers Sourcing Process: Decisions are managed at the head office level, prioritizing quality and consistency, followed by cost considerations Key Purchase Decision Drivers: Quality: Consistency is critical. Cost-effectiveness: Supports the brand’s value focus Challenges: Maintaining freshness and performance during delivery. The brand may benefit from innovations in this area Product Specifications and Preferences: Mozzarella is the dominant cheese, with high standards for performance and quality to ensure customer satisfaction Ovens: Deck and conveyor ovens are used to support quick preparation times Refrigeration Capacity: Facilities are designed to handle large volumes of cheese and perishable ingredients
Additional information	Domino’s KSA benefits from a strong digital ordering platform and strategic growth initiatives within the region

	Maestro Pizza Number of Outlets: 168
Positioning & Activities	Founded in 2013 by Saudi entrepreneur Khalid Al Omran, Maestro Pizza is a prominent local pizza chain in Saudi Arabia, known for rapid expansion and high-quality, affordable pizzas. It operates across multiple (43) cities in the Kingdom and aims for regional growth Maestro positions itself as a mass-market brand, appealing to a broad demographic with affordable yet quality pizzas A hybrid model, focusing on both take-out and dine-in services. Since its launch, Maestro has experienced fast growth, with dozens of outlets opening within the first year in Riyadh. Maestro offers a diverse menu of pizza varieties, including popular options such as super cheese supreme pizzas Frequent promotions and discounts are used to attract customers, leveraging competitive pricing As well as the Maestro Pizza format the company has in 2022 and 2023 launched MAD Pizza and Pinzatta as well as expanding the main brand into Dubai. Besides the pizza outlets, the holding company, Daily Food, also has the burger restaurant Groundr
Performance	Total Daily Food Trading Company revenue not disclosed
Pizza cheese, requirements and sourcing	Product Forms Purchased: Typical for similar chains, Maestro likely uses shredded and block cheeses for pizza preparation Cheese Sources: Maestro emphasizes locally-inspired menus, likely relying on local or regional suppliers for ingredients, including cheese Sourcing Process: Strategic sourcing decisions are generally made at the head office level to ensure consistency across all locations. Key Purchase Decision Drivers: Quality and Taste: These are prioritized in cheese sourcing to deliver flavorful pizzas while remaining affordable Challenges: No specific challenges are reported, though consistency across outlets remains essential Product Specifications and Preferences: Mozzarella or mozzarella blends are likely the most popular choices, aligning with consumer preferences in similar markets Ovens: Convection ovens or similar models are likely used to ensure quick cooking, matching the fast-service model Refrigeration Capacity: Standard refrigeration space to store daily ingredients, typical of pizza chains
Additional information	Maestro Pizza’s growth has been fueled by its local roots and consumer insights, resonating with Saudi preferences through innovation and value-driven offerings Regarding their use of technology, *"In a bold move to redefine the quick-serve restaurant industry, Saudi Arabia's Maestro Pizza by Daily Food Co has embraced the Veeam Data Platform on AWS, transforming its IT landscape. With an eye on innovation and efficiency, the leading pizza chain has not only achieved substantial savings on IT operational and capital expenses but has also revolutionized market delivery times. The strategic deployment of this technology underscores Maestro Pizza's commitment to being at the cutting edge of the industry and positions them as a disruptive force in Saudi Arabia's fast-growing market"* (direct quote from Internet source)

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Operator profiles: Oregano Pizzeria & Papa John's

	Oregano Pizza Number of Outlets: 25
Positioning & Activities	Oregano Pizzeria is a popular pizza chain in Saudi Arabia, known for fresh, high-quality ingredients and a diverse menu featuring traditional and gourmet pizzas. It caters to local tastes and international flavors, providing a unique dining experience Oregano Pizzeria positions itself as a mid-range to high-end dining option, appealing to families and young professionals with a focus on quality ingredients and artisanal pizza Offers a hybrid model with dine-in and takeout options, catering to customers seeking both quick meals and sit-down experiences Italian-inspired pizzas with regional twists, including Moroccan and Indian varieties Seasonal and special item-based promotions are common
Performance	2023 Revenue: SAR 10 million; projected 2024 Revenue: SAR 12 million, representing an approximately 20% year-on-year growth
Pizza cheese, requirements and sourcing	Annual Cheese Volume estimated at 100-150 MT. Varietals used include mozzarella, parmesan, ricotta, feta Product Forms Purchased: Blocks: Primarily used for in-house shredding Shreds: Pre-shredded cheese for convenience and quick service Frozen: Occasionally used for managing seasonal demand and inventory Specialty Cheeses: Sourced in various forms as needed Cheese Sources: Primarily sourced from local suppliers within Saudi Arabia for freshness and halal compliance. Some specialty cheeses may be imported from countries like Italy and the U.S. Sourcing Process: Sourcing decisions are made locally to ensure regional taste alignment. Supplier relationships are prioritized to maintain consistent quality and timely deliveries Key Purchase Decision Drivers: Competitive Pricing: Ensures value while maintaining profitability Quality: High-quality cheese is essential for customer satisfaction and flavor consistency Challenges: Logistical hurdles may arise, with a focus on innovative toppings and higher quality options Product Specifications and Preferences: Buffalo mozzarella and mozzarella blends are popular choices for their flavor and performance Ovens: Primarily deck ovens, which provide even heat distribution for optimal crust and cheese melt. Convection ovens are also used for specific menu items Refrigeration Capacity: Large walk-in units support bulk storage, with smaller reach-in units in the kitchen for frequently accessed items, ensuring smooth kitchen operations during peak hours
Additional information	Oregano Pizzeria's core customer base includes families, young professionals, and pizza enthusiasts. The brand utilizes both online and offline marketing strategies, including social media, local partnerships, and loyalty programs to enhance customer engagement and retention

	Papa John's Number of Outlets: 31
Positioning & Activities	Originally from the U.S., Papa John's operates multiple locations across Saudi Arabia, focusing on American-style pizzas with high-quality ingredients, such as fresh dough, vine-ripened tomato sauce, and Italian-style cheese. The brand emphasizes quality and customer satisfaction as core values Papa John's positions itself in the mid-to-high-end segment, competing with brands like Domino's and Pizza Hut, with a focus on premium ingredients and consistent quality A hybrid model offering dine-in and delivery services, along with takeaway and contact-free delivery options Classic pizzas, including Pepperoni, Margherita, and All the Meats, are popular. The menu also includes sides, salads, and desserts Regularly offers LTOs, discounts, and combo deals to attract customers and boost sales
Performance	In 2023, Papa John's International reported revenues of €1.93 billion. Specific figures for Saudi Arabia are not disclosed, but the global revenue reflects a slight decrease compared to the previous year
Pizza cheese, requirements and sourcing	Annual Cheese Volume estimated at 250-300 MT Product Forms Purchased: Primarily uses shredded cheese blends, emphasizing freshness and flavor to maintain consistency across all pizzas Cheese Sources: Papa John's ensures strict quality standards for its ingredients, with sourcing likely involving regional or global vendors. Specific suppliers for Saudi Arabia aren't detailed Sourcing Process: Decisions are guided by the global head office, with local adaptations as needed to meet regional preferences Key Purchase Decision Drivers: Quality: Focuses on maintaining high standards in taste and performance Brand Consistency: Superior quality is prioritized over cost for brand integrity Challenges: Supply chain constraints and cost fluctuations due to imported cheese are challenges. Innovations in taste or extended shelf life would support operations Product Specifications and Preferences: Mozzarella and specific cheese blends are prioritized for their taste and performance Ovens: Conveyor and deck ovens are standard, ensuring consistent and efficient baking. Refrigeration Capacity: Large cold storage units support the brand's focus on fresh, high-quality ingredients
Additional information	Papa John's promotes a people-first culture, focusing on customer satisfaction, employee well-being, and community engagement. Quality in food remains a consistent brand message across locations in the region



Consumer Preferences and Trends

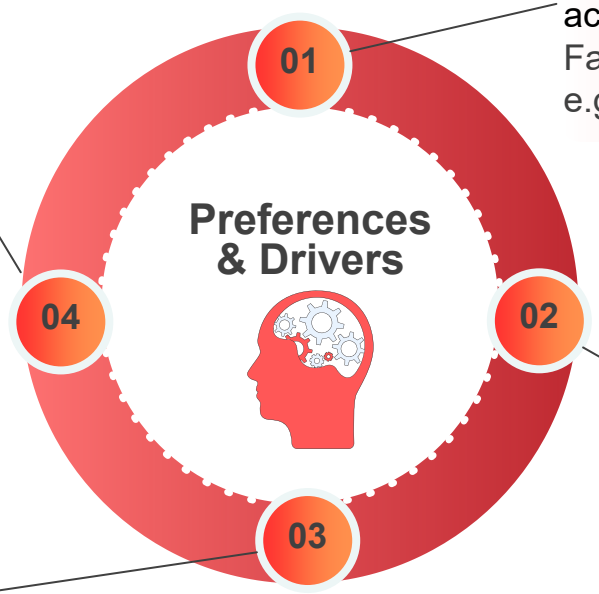
Consumer drivers: Urban, young, and time-strapped lifestyles fueling frozen, delivery, and dine-in pizza demand.

E-COMMERCE

Alternative pizza channels are expanding alongside the rapid growth of e-commerce, which allows for direct-to-consumer sales of both frozen and chilled pizzas.

YOUTH & FAST-FOOD CULTURE

A younger population is driving growth in pizza consumption across both dine-in and delivery foodservice channels
Fast food is a popular food choice and supports socializing also e.g., watching sporting events.



CONVENIENCE

Consumers are prioritizing quick and easy solutions to better fit with busy lifestyles
This is especially prevalent in urban areas
With the fast-paced lifestyle in KSA, frozen and ready-made pizzas with high-quality cheese are gaining traction, appealing to time-strapped consumers.

CULTURE & RELIGION

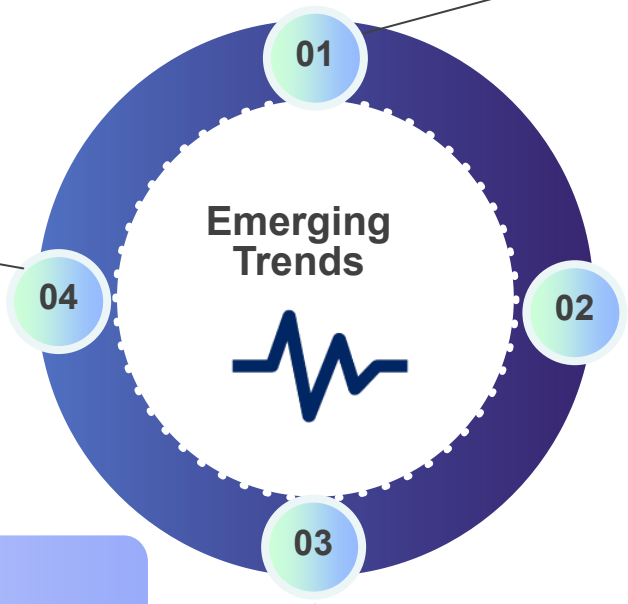
The demand for halal-certified and locally produced cheese is driven by cultural and religious factors, as consumers in KSA prioritize products that align with Islamic dietary law.

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Emerging trends: Premiumization, value-seeking, artisanal ingredients, and online meal kits are reshaping Saudi pizza cheese demand.

ATRISANAL AMBITIONS

Consumers and foodservice operators like fresh mozzarella, burrata, and gourmet mixes on pizza. This follows worldwide trends toward genuine, artisanal ingredients.



PREMIUMISATION & URBANISATION

Saudi consumers, especially in urban areas, are willing to pay more for quality and authenticity, driving demand for premium pizza cheese varietal offerings.
This is driving usage of parmesan and Emmental in particular.

MEAL KITS

Online meal kit services that provide pre-assembled pizza ingredients are gaining traction among health-conscious and gourmet consumers
This drives demand for both shredded and cubed pizza cheese varietal.

BUDGET STILL IMPORTANT

Alongside the affluent, gourmet pizza crowd there are still many concerned with rising inflation and fluctuating household budgets.
Promotional bundles, especially in retail, remain a key driver for this sub-set of consumers.

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Frequency and occasion: Pizza consumption skews younger, with 35% eating weekly and 52% monthly, often tied to lunch, special events, sports, Ramadan late nights, and celebrations.

Consumer types	%
Younger (Under 40)	72%
Older (40+)	28%

Consumption frequency	% occasions
Daily	3%
Weekly	35%
Monthly	52%
Less than once per month	10%

Meal type	% occasions
As a snack	10%
As a meal	70%
Lunchtime meal	45%
Evening meal	25%
Special occasion	20%

- Lunchtime is an important consumption occasion, with a higher share than evening meal
- Special occasions rank higher than some other markets, estimated at 20% of all pizza consumption occasions.
- These special occasions include birthday, anniversaries, office parties and pizza as a treat
- Sporting events are also actually viewed within pizza outlets with food and entertainment crossing over at the same venue.
- Late nights during Ramadan month will also see a spike in pizza consumption.
- There is a high proportion of consumption taking place on a weekly basis as pizza continues to gain in popularity and relevance.

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Egypt Market Overview



Egypt's pizza cheese market is reopening, but high inflation and weak purchasing power keep price a key barrier, favoring low-cost local cheese over imports.

Market summary

- The overarching trend is that the country is emerging from the challenges due to lack of foreign currency, which means that trade is becoming a possibility again. This is due to multiple factors including IMF support worth approximately $8bn USD pledged in March 2024.
- There have certainly been shortages of higher specification natural cheese due to inflation and imports becoming increasingly cost prohibitive. This is likely impacting more specialty cheese (including parmesan and provolone in the pizza cheese varietal segment) as well as wider specialty cheeses such as camembert and brie.
- However, despite economic advances, inflation is still incredibly high (some interviewees indicated 30%+), leading to very weak purchase power. As a result, consumers are having to cut back, and operators are having to find ways to reduce costs to stay competitive.

Pizza and pizza cheese varietal trade and consumption

- Inflationary pressure has meant that cheap local 'pizza cheese' has become even more entrenched and, in some cases, there has potentially been a switch from imported pizza cheese varietals to locally produced. Local manufacturers have been increasing production capabilities and capacity to fill the void left by falling imports.
- analog cheese forms a significant part of the supply chain to pizza food service.
- Although a smaller part of the market, prepared pizzas in both chilled and frozen format have experienced strong growth. Between 2016 and 2021 a strong CAGR has been reported by some industry data sources.
- Recent growth of local pizza chains and a relative decline in some of the international chains like Pizza Hut is broadening the potential buyer base for exporters, although many of the smaller, cheaper pizza businesses will continue to look to cheap, local supply over more expensive foreign cheese.
- More pizza chains are clustering around areas such as New Cairo, which might make local distribution more targeted and/or efficient. These potential efficiencies might help exporters grappling with the price differential to bridge some of the gap between the price of imported vs. local cheese.

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Opportunities and Challenges

While tariffs, currency limits, and strict import rules pose challenges, Egypt offers long-term potential through demand from premium pizza chains, interest in natural mozzarella, and its role as a gateway to Africa.

Challenges

- Both non-tariff and tariff barriers are considered to be high in Egypt.
- One barrier to additional trade with the U.S. are the minimum order quantities imposed by the U.S. suppliers. There are only a limited number of importers and end users for whom having to deal in whole container loads would not present a significant barrier.
- The importance of currency availability cannot be overstated. Restrictions on imports have been very significant. However, since IMF intervention in March 2024 currency can now be obtained within only 48 hours.
- Egyptian import regulations are stringent. It is not uncommon for products to be rejected for very minor discrepancies. However, recent modernization of customs and import systems, with greater online functionality and streamlining have improved the situation for exporting countries.
- Price is a major barrier to trade. In order to justify any price premium there would need to be a demonstrable benefit to importers/end users. This might include a need to provide additional support, education and marketing materials to justify U.S. supply.
- Related to price is the U.S. preference for use of the spot price of cheese. Any willingness or ability to provide a fixed price, even if just three to six months, may help to overcome this challenge.
- Industrial scale local pizza cheese, through players like Arabian Foods, Lactalis Halawa, Farm Cheese and Arab Foods, have been increasing in both quality and capacity meaning there are offering viable local alternatives.

Opportunities

- There is a key opportunity to supply local chains positioned more towards the upper tier (chains and independents). They are seeking out higher quality, natural mozzarella but struggle to find importers to serve them due to the low volume orders.
- There were previously some importers who were buying two to three containers every one to two months to cater to these customers. However, recent pricing has prohibited this. As a result, some local pizza cheese producers have been trying to produce more *natural* mozzarella. This opportunity could play well to a smaller, high-quality niche producer.
- Egypt can act as a trading hub for the wider African continent.
- Although on a longer-term horizon, as the economy continues to recover, and as Egypt continues to seek to develop and modernize, there is further potential for exporters to increase activities in this market.

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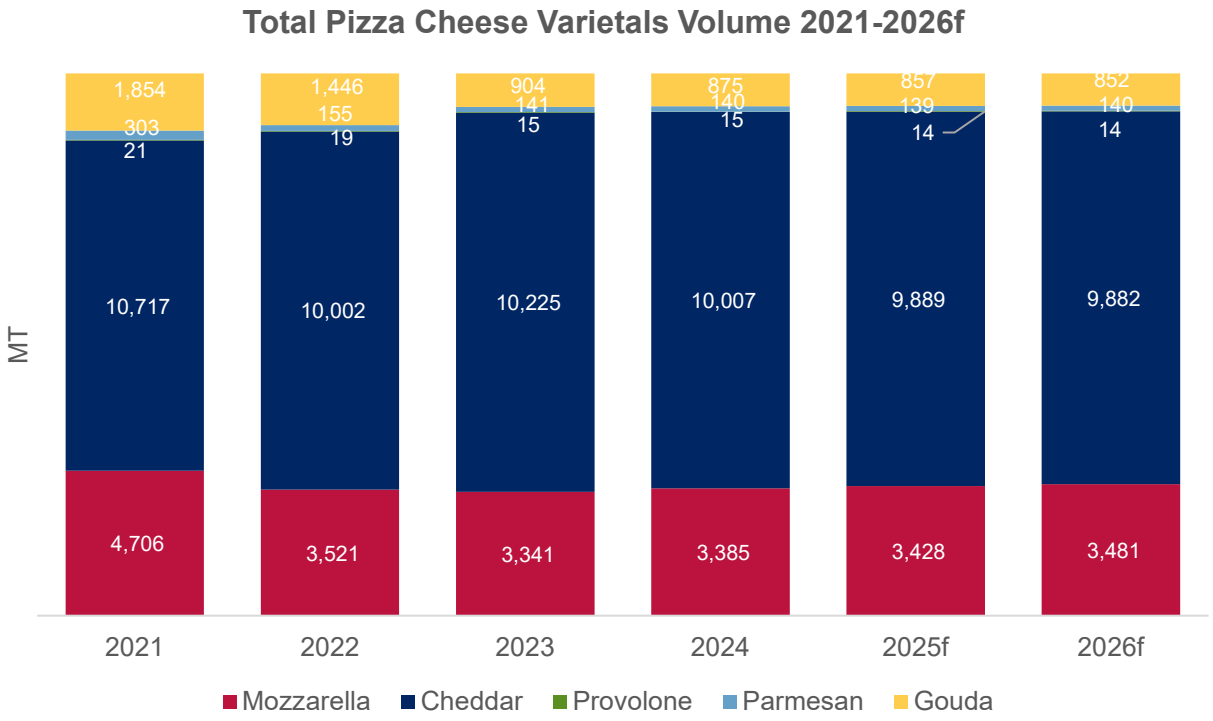
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Pizza Cheese Metrics



Pizza cheese varietals universe: Cheddar remains highly popular in Egypt, supported by similarities with local Romy cheese; mozzarella has stabilized after its 2022 decline.



Value ($M)	2021	2022	2023	CAGR 2021-23
Total Varietals	56	71	82	20.6%
Cheddar	32	50	66	43.2%
Mozzarella	21	16	15	-11.2%
Others	3	5	1	-

2024 total volume:

- 14,421 MT across all pizza cheese varietals
- Although cheddar is the most significant varietal, much of this volume is being consumed outside of the pizza sector.

2023 market value:

- Total pizza-cheese varietals worth $82 million, but mozzarella value dropped to $15 million due to declining imports and rising local production.

Mozzarella trends:

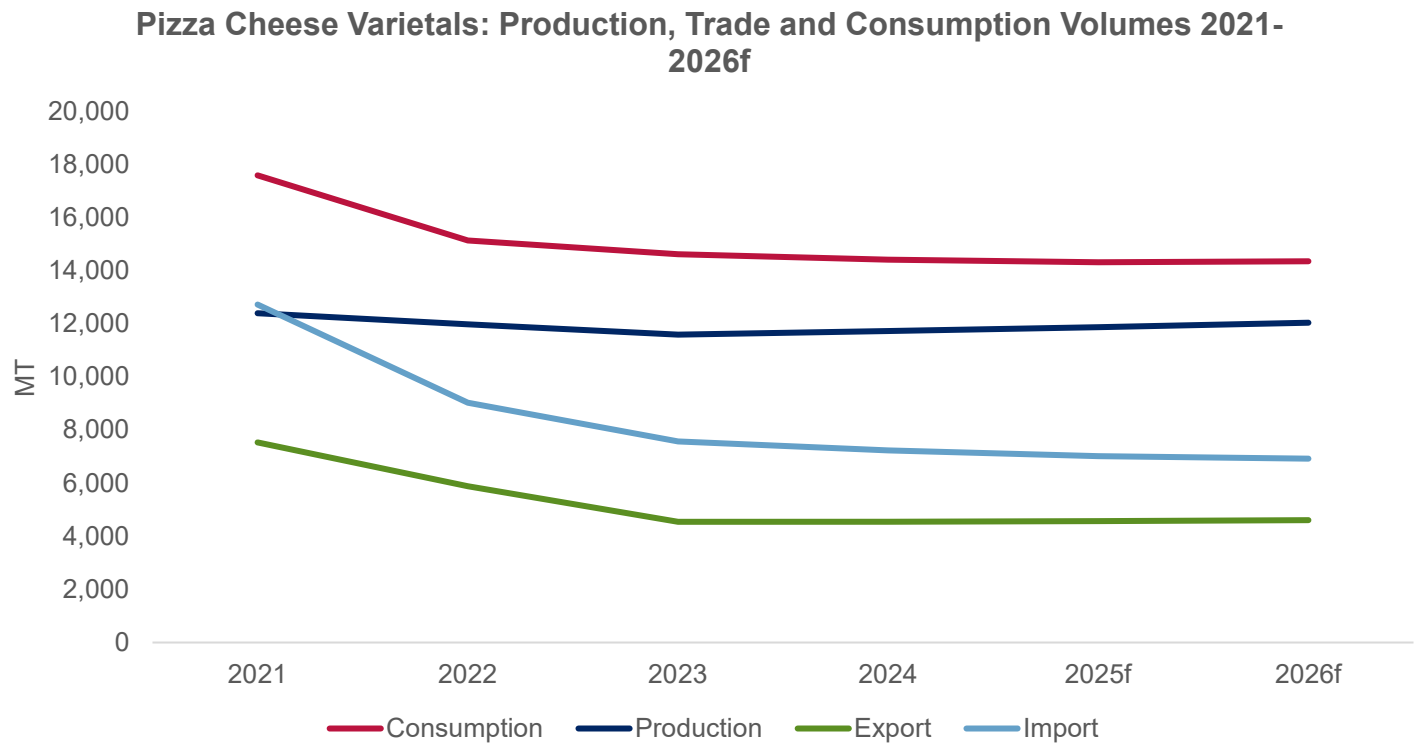
- Growing specifically in pizza usage
- Reversed previous decline and is projected to grow at 0.9% CAGR through 2026.

International and local/independent chains:

- International chains use natural mozzarella, mostly imported. Although local processors are increasingly able to fill supply gaps.
- Independent/local chains typically use locally produced natural mozzarella or vegetable oil–based analog cheese.

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Supply situation: Local production is expected to rise, offsetting import declines, while exports stabilize.



Volume MTs	2021	2022	2023	2024	2025	2026
Consumption	17,602	15,143	14,626	14,421	14,328	14,369
Production	12,407	11,988	11,601	11,740	11,878	12,052
Export	7,540	5,883	4,548	4,555	4,569	4,611
Import	12,734	9,039	7,574	7,236	7,020	6,928

- Economic headwinds—inflation, high input costs—have driven declining production, consumption, and imports of pizza cheese between 2021–2024.
- While overall pizza-cheese demand is expected to stabilize over the next two years, future growth is projected to be supported by increased local production rather than imports. Local cheese producers (e.g. Arabian Foods, Green Fields, Arab Dairy) have expanded capacity to compensate for shrinking imports — on both industrial and artisanal scales.
- Egyptian industrial-scale mozzarella is considered reasonable quality, and is even used by high-end hotels sourcing from local producers. However, artisan-produced pizza cheese remains inferior in quality compared to U.S. imports, creating a clear quality gap.

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

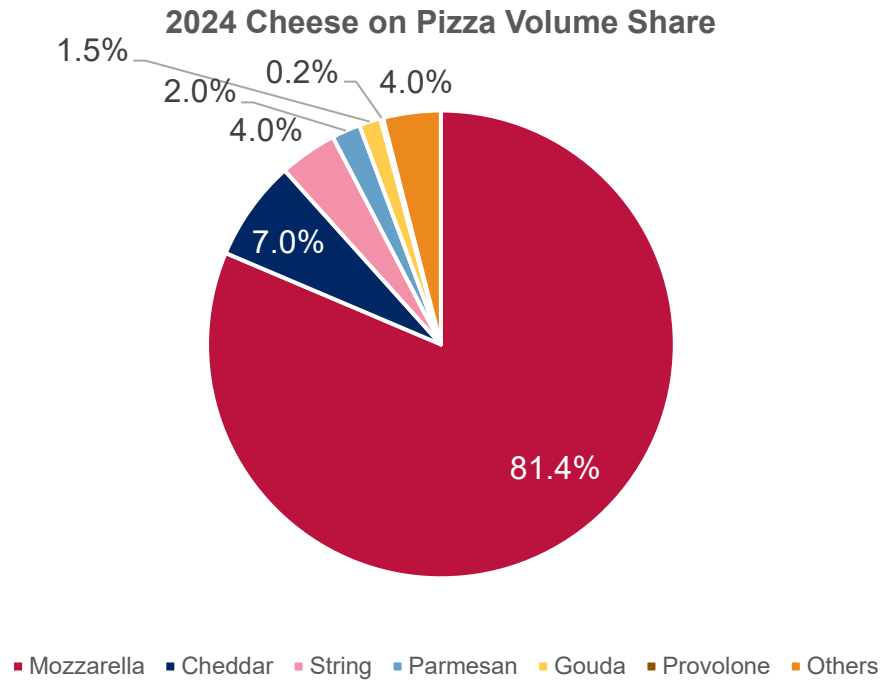
Total Universe of Pizza Cheese Varietals

Cheese on Pizza Only

Cheese on Pizza volumes exclude non-pizza uses

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Varietal mix: Mozzarella dominates pizza use, though much of it is analog, with other natural cheeses playing only minor roles.



Total cheese on pizza use: 7,047 MT

Pizza Cheese Product Mix	2024 Volume (MTs)
Mozzarella	5,735*
Cheddar	491
String	282
Parmesan	140
Gouda	105
Provolone	14
Others (Romy, Ricotta, Blue)	280

* Estimate 35-40% analog cheese

- The key market distinction is between natural cheese and artificial/analog cheese, which aligns closely with the pizza chain's positioning and the social class of the targeted consumers.
- Independent "mom-and-pop" pizzerias commonly use unregulated local blends—often combining cheddar, Romy, and other cheeses. Quality is generally considered poor.
- There remains strong demand for natural mozzarella, especially among international pizza chains and higher-end local operators that seek a fitting balance of quality and price.

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Finished pizza market: At 25,000 MT, foodservice dominates; international chains lead, but local chains are rising.

2024: Pizza market* 25,200 MT	Retail: 2% **	Foodservice: 98%
Food service Operators	**International/National**	**Number of outlets**
Pizza Hut	International	94
Papa John's	International	70
Domino's Pizza	International	37
Cook Door (*Pizza Ria* format)*	National	32
Pizza King	National	26
Roma Pizza 2 Go	National	12
Primo's American Pizza	National	12
Pizza Master	National	7
Happy Joes Pizza & Ice Cream	International	6
Sbarro	International	4
Maison Thomas	National	4
Pizza Station	National	4

- International chains have significant category volume, despite having few outlets per capita in Egypt—reflecting the rural structure and low pizza outlet density. The top three positions in market share are held by major international brands, although local chains have gained traction in the past two years.
- Local chains Pizza Station, Primo's Pizza, Pizza Roma enjoy strong consumer popularity—Pizza Hut appears to be losing ground amid social-media-fueled boycotts. Local chain growth presents opportunity, but many still purchase directly from retail, avoiding importers/distributors. Smaller chains may not meet minimum order thresholds to partner with distributors effectively.

*Finished pizza market is the volume of pizzas sold. The figures are drawn from both primary and secondary work.
** Pizza Ria format in selected outlets only

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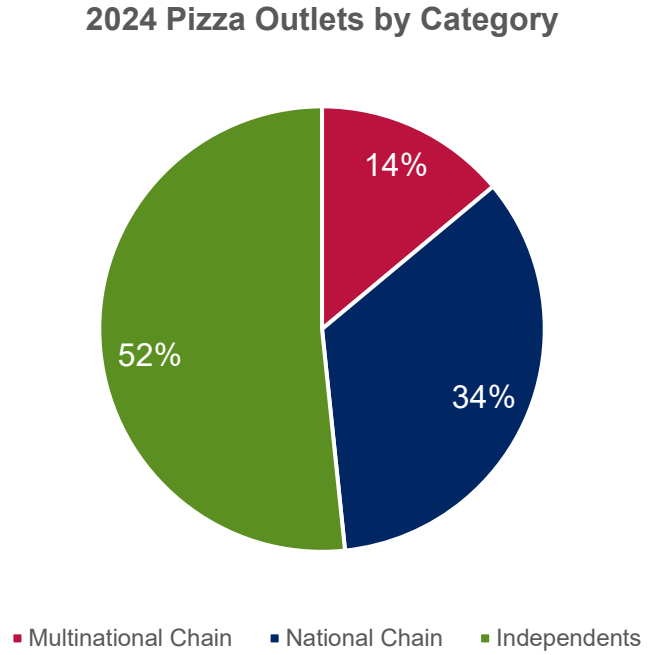
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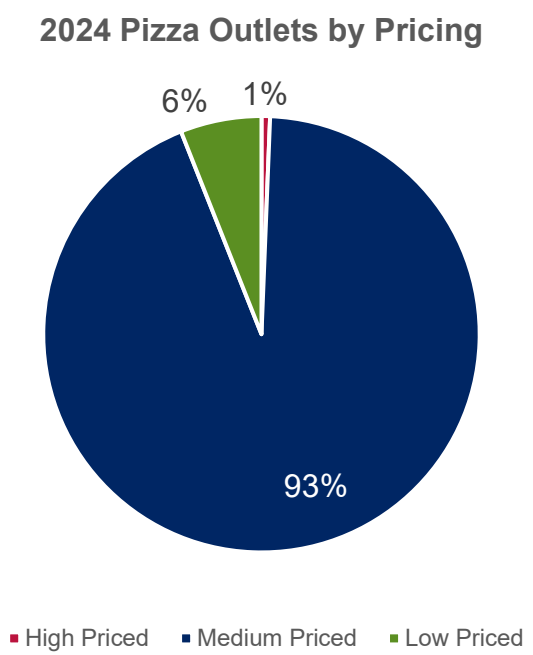
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Buyer Universe, Preferences, and Drivers

Market mapping: Although international chains drive very significant volumes per outlet, 86% of outlets are national chains and independents.



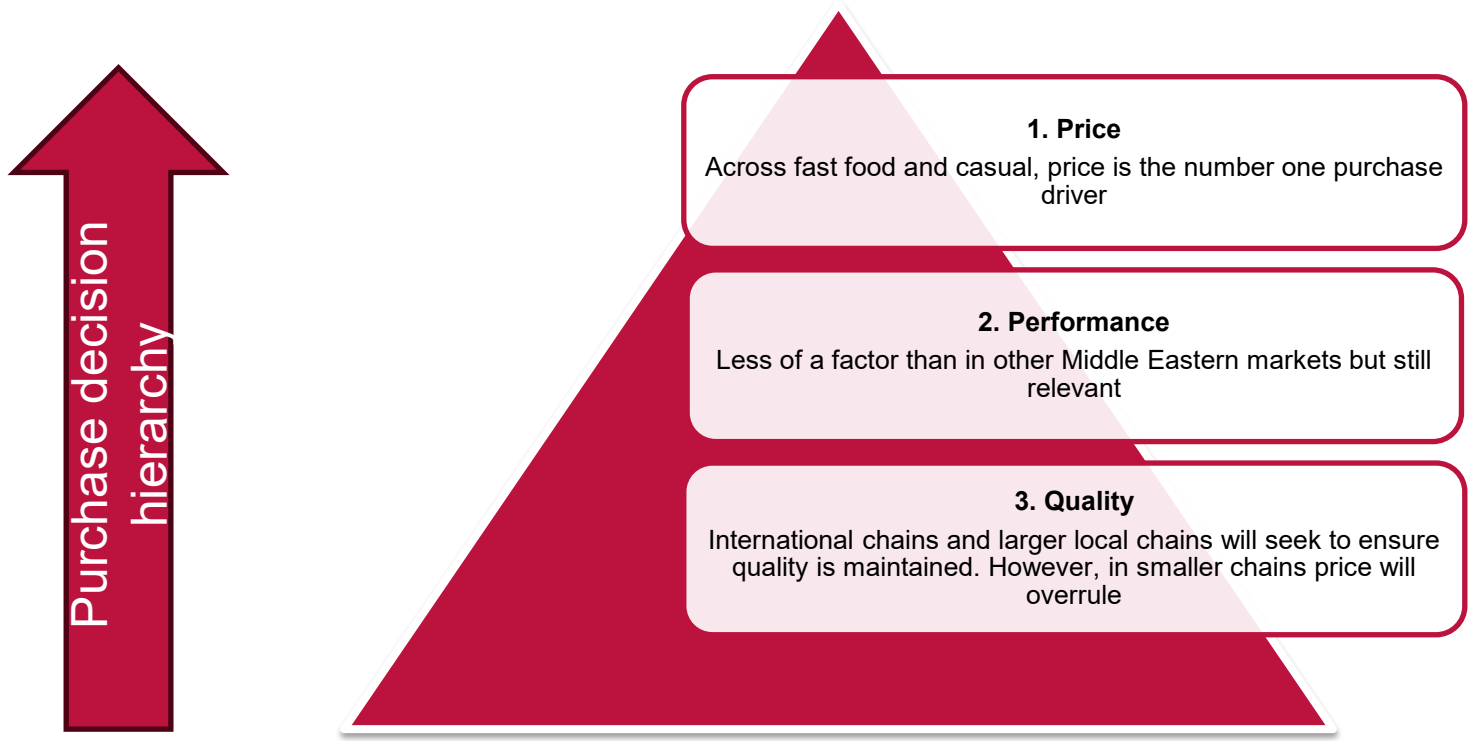


Total Pizza Outlets: **1,440**	
City	**Rank**
Cairo	1
Alexandria	2
Shubra El Kheima	3
Mansoura	4
Giza	5
El Mahalla El Kubra	6
Port Said	7
Suez	8
Tanta	9
Asyut	10

- There are approximately 1,440 pizza establishments in Egypt, including both specialist and hybrid restaurants.
- Tiered Egyptian market structure: 1) Base tier: large number of low-tier outlets. 2) Mid tier: international chains and higher-end locals (e.g., Primo's American Pizza). 3) Upper tier: Italian-style restaurants in upscale areas like Cairo's 5th Settlement. About 93% of outlets sampled are rated 'medium'-priced, targeting average consumers.
- Concentrating on Cairo and Alexandria offers critical mass, especially since about 57% of the population is rural.

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Buyer drivers: Price leads purchase decisions, dominating sourcing choices since the cost-of-living crisis.



- Price dominates decision-making in lower-tier restaurants—often outweighing performance and even quality. Due to cost sensitivity, lower-tier restaurants accept analog or blended cheese.
- Consumption habits: Egyptian consumers generally accept analog or vegetable oil-based cheeses. Analog ambient cheese holds a large share in non-pizza cheese consumption, reflecting low emphasis on authenticity. However, when available, higher-quality cheese is noticeable to consumers and can influence their choice of pizza venue.

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Buyer preferences: Requirements vary widely by establishment, from premium IQF cubes and shreds to low-quality blends for small chains.



Formats:

A number of formats of pizza cheese varietals are present. For example, it is understood some international chains request IQF cubed format However, much other product is delivered to store in shreds ready for direct use on pizza



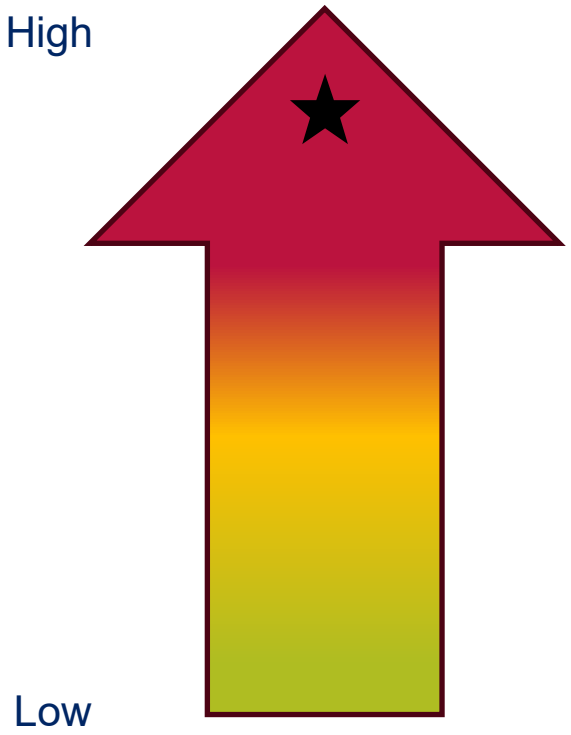
Preferences:

These vary hugely depending upon type of establishment. Whereas large international chains maintain high-quality standards and prefer mozzarella which is yellow in color, slightly salty, milky in flavor and IQF, independents have much less defined preferences

Quality at small, independent outlets and stalls can be very low

Price Sensitivity Rating:

VERY HIGH



- Egypt is highly price-sensitive, with cost often being the overriding requirement for buyers.
- Buyers frequently switch between local and imported sources based on prevailing market prices and supply conditions.
- Given this dynamic, buyer loyalty is low, and exporters may need to accept lower margins to establish or grow their presence in Egypt's competitive, price-driven environment.

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Buyer landscape: The market is relatively fragmented, particularly due to large numbers of small importers and distributors.

Pizza Manufacturers		Importers/Traders/Distributors	Retailers	
Company Name	Brand	Company Name	Company Name	Store Count
Edita Foods Industries	Molto Forni	Juhayna	Carrefour	62
Seoudi Market	Pizza Romano	Mazex Imports and Exports	Metro Market	48
Metro Markets	Metro Pizza	EF Ingredients	Spinneys	26
Edita Foods Industries	Fancy Foods Cairo	Forsan Foods	Seoudi Market	25
Chef Mimo	Chef Mimo Pizza	Cheese Solutions	Lulu Supermarkets	5
		Abu Ashara Company for Trading & Import		
		AM Foods Group		
		MGK Import & Export		
		United Grocers		

- In Egypt, frozen and chilled pizza is found in higher-end retail outlets. Edita Foods launched the Molto Forni frozen pizza line (Margherita and plain crust) in early 2024, targeting increased at-home pizza consumption.
- The market is generally considered too small to justify large-scale cheese conversion services. However, some players have started to offer this service. For example, Cheese Solutions has offered value-added cheese packaging (cubes, shreds, blocks) for around five years.
- In 2023, Fonterra announced plans to close its office in Egypt—part of a strategic exit from the Consumer Brands business amid global economic conditions. This exit may open the market to new or existing local and international suppliers looking to fill the gap in cheese and related ingredient supplies.

Operator profiles: Primo's American Pizza and Edita Foods Industries

	Primo's American Pizza: 12 outlets
Positioning & Activities	Local Egyptian pizza chain. Primo's operates 12 sites across Cairo and is seen as a local rival to international chains providing a quality experience of American style pizzas Strong branding as offering 'American-type' pizza but with a very proud Egyptian heritage. Seen as the high end of local chains, with good quality local mozzarella, with a slightly salty taste as a core part of the offering. There is strong branding and good brand recognition in market, further strengthened by branded mozzarella shred product sold through retail Hybrid model but favoring delivery, with large fleets of branded delivery motorcycles at restaurant hubs across Cairo
Performance	$3m (estimated)
Pizza cheese, requirements and sourcing	Total pizza cheese annual volume: 150 MT (estimated) Mozzarella: 130 MT Cheddar: 8 MT Provolone: 5 MT Gouda: 5 MT Other cheese: 2 MT Shredded mozzarella is sourced via local large scale producers e.g. Arabian Industries (who also produce the retailer listed SKU which is "for restaurants"). The cheese has a more salty taste than US mozzarella, although not overpowering like smaller artisanally produced mozzarella
Additional information	It is assumed that conveyor ovens will be used to support high volumes per outlet. Higher footfall stores producing c.250-300 pizzas per day Opportunity to provide an alternative to local mozzarella producers, tying in with American product positioning

	Edita Foods Industries: Local frozen pizza manufacturer
Positioning & Activities	Edita operates seven ISO- certified, state-of-the-art facilities in Egypt and an overseas facility in Morocco, all-in-all housing 36 production lines with an expanding regional footprint that covers over 20 export markets (information from Company website). Within pizza cheese the company has the Forni Margherita Pizza as part of its processed foods division Molto brands are in very strong retail distribution across snacks and confectionary and also processed foods, with presence in a number of the major retailers such as Seoudi Market, in particular where there is no presence of a competing retail own label brand Positioning of the pizza is high end, with "100% natural" part of the on-pack messaging
Performance	2023 revenues were 12.1 billion Egyptian Pounds (EGP) with year-on-year growth of 58%. Revenue in the frozen part of the business in 2023 was 14m EGP so does currently represent a small part of the overall business
Pizza cheese, requirements and sourcing	Only SKU is the Molto Forni frozen pizza, available in margherita flavor and the plain pizza crust, encouraging at home pizza making Product claims 100% natural mozzarella Ingredients sourced via head office procurement team
Additional information	Although a small opportunity, the frozen part of the market is growing and there is a strategic plan for growth being put in place as Egypt emerges from a turbulent economic period In addition, Edita regional expansion plans, for example in Morocco, may give U.S. exporters a route into multiple markets in the region, using Egypt as a beachhead for further expansion into the region

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Operator profiles: Pizza Hut

	Pizza Hut: 96 outlets
Positioning & Activities	International chain operating out of a regional hub under the ownership of Americana in Saudi Arabia. The largest player across Egypt and the first to really establish a presence in this market Higher end within chain pizzas franchise universe but pricing not exclusive Hybrid model - although take out in large cities like Cairo is very significant. There is a clear emphasis on collection and delivery, but all three parts of the business are important
Performance	Turnover not disclosed for Egypt specifically. Pizza Hut is clear market leader by outlet number, although it is believed that market share is being eroded as a result of an increasing number of reasonable quality local chains
Pizza cheese, requirements and sourcing	Estimated annual pizza cheese requirement: 1,500 to 2,000 MT Mozzarella: 1,350 - 1,800 MT String: 75 MT to 100 MT Cheddar: 75 MT to 100 MT They source frozen shredded mozzarella as the primary product, believed to be supplied by Arla in Europe Purchasing decisions are taken on a regional basis. Purchasing is for Middle East and North Africa. It is understood that this regional agreement is on a multi-year basis Main challenge has been sourcing overseas imported cheese cost effectively
Other information	Predominantly use conveyor ovens (Lincoln Double Deck) Capacity in freezers equates to approximately 2-3 days supply. Estimated storage of around c.50kgs per average outlet. Americana owns a frozen warehousing facility in Egypt which holds around 4 to 5 months of cheese stock
Additional information	Although Pizza Hut has been coming under pressure in the market, it remains hugely popular, with many consumers citing this as their favorite place to source pizza. Coupled with a very high daily pizza throughput, especially in busy urban areas such as Heliopolis, Cairo, Pizza Hut still remains one of the main volume plays in market

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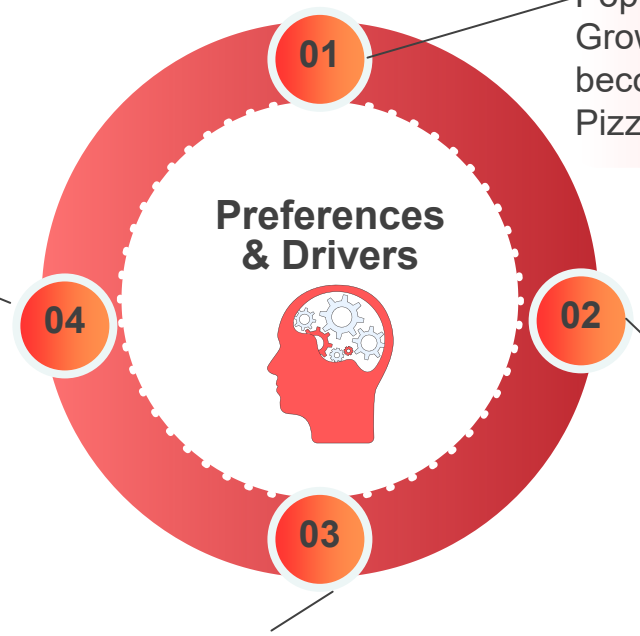


Consumer Preferences and Trends

Consumer drivers: Egyptians' passion for cheese drives demand for cheese-heavy pizzas, with stuffed crusts and American-style formats most popular, while Italian-style pizzas are emerging at higher-end establishments.

CHEESE FANS

There is knowledge of establishments where higher quality cheese is used.
Primo's American Pizza referenced by consumers.
Consumers love the stretch and mouth feel of mozzarella.



CONVENIENCE

Popular during lunchtimes as a grab and go option.
Growing popularity of 'by-the-slice' while at shopping malls is becoming a feature. Delivery option and location are key
Pizza is a quick and easy way to satiate hunger.

TOPPINGS AND BASES

Egyptians have a real passion for cheese, and a culture of high per capita cheese consumption. They prefer more cheese on their pizza, hence add-ons such as stuffed crust are very popular.
Egyptians brought up on American style pizzas, which remain most popular, although shift towards Italian style is coming in at the higher end establishments such as What the Crust?.

SHARING OCCASIONS

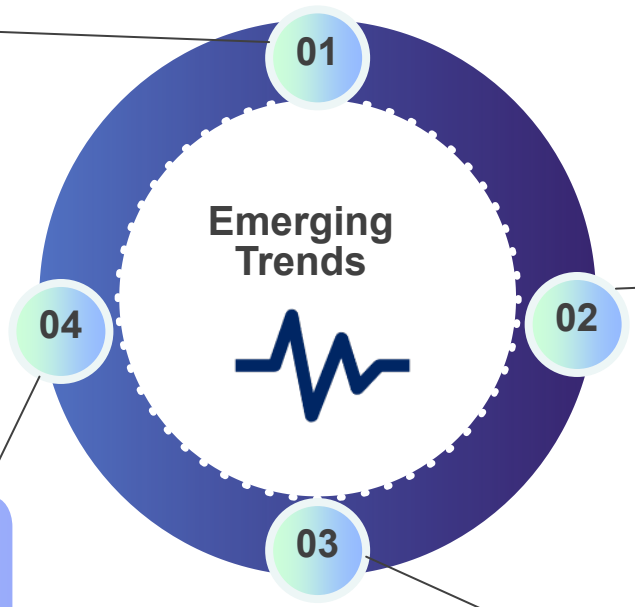
Strong sense of communal/sharing occasions. Groups of friends will order different types of pizza and then share with each other
Benefit of pizza is ability to order multiple different types and then mix and match flavors and tastes. Family sharing occasions are important.

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Emerging trends: Growing preference for local chains over U.S. brands, increased at-home pizza making, and rising emphasis on freshness and quality in purchase decisions.

ACT (AND EAT) LOCAL

Trend towards consumption in local chains which has recently been accelerated through boycotts of some U.S. chains such as Pizza Hut.
There is a clear local awareness of Egyptian pizza chains vs. multinational with consumers tending to associate with one or the other.



HEALTH AWARENESS

Although very early stage, and not yet impacting the pizza category, awareness about salt and sugar levels is starting to grow. Some consumers stated a preference towards thin crust to limit calories and carbohydrates. Health is increasingly on the radar, as evidenced by a parallel growth in food categories such as protein bars.

AT HOME COOKING

At home pizza making is fairly common, with a mix of households either making dough from scratch or buying pre-made frozen pizza bases and adding ingredients directly. If I had time to make my own "why would I not?"

FRESH QUALITY

Freshness and quality have both been called out as factors likely to influence future pizza purchase decisions.

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Frequency and occasion: Pizza is often consumed twice monthly, skewing toward families and higher-class consumers who favor international chains.

Consumer types	%
Younger (Under 40)	70%
Older (40+)	30%
Families*	50%

Consumption frequency	% occasions
Weekly	20% (2 to 3 times p/w)
Monthly	70% (2 times per month)
Less than once per month	10%

Meal type	% occasions
As a snack	10%
As a meal	90%
Lunchtime meal	50%
Evening meal	40%

- Families as very important consumer segment and family outings to pizza restaurants on Friday and Saturday are commonplace. Children are important consumers.
- Pizza consumption is more focused on the higher classes with class A, class B and, potentially, class C more likely to eat at international chains. Local chains and budget cafes and coffee shops cater to the lower socioeconomic groups.
- There is a significant presence of heavy pizza consumers, particularly in the 15-30 age range. It is not uncommon for pizza consumption once or twice a week.
- Lunchtime work occasions and sharing is quite commonplace.
- Although average consumption would be 1-2 times per month, there is a subset of heavy pizza consumers who will consume 2 to 3 times per week.

"I would eat pizza every day if there was a healthy version" (Female, 25)

"The good thing about pizza is that it isn't challenging, and therefore whether for youth or families it is a meal which pleases everyone" (Market SME)

*Families = family and group occasions

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Appendix A

Objectives, Research Design & Methodology

OBJECTIVES	SCOPE	METHODOLOGY - PART 1	METHODOLOGY - PART 2
The primary objectives for this research were to: • 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	**Markets** • 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	**Trade data:** • Import and export data reviewed for main pizza cheese-related HS codes • USDEC Global Cheese database reviewed and analyzed for all pizza cheese varietals included in the database itemization **Review of secondary data** • Multiple industry reports, media articles and local trade data consulted for each country **Primary Research: Trade** • 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) **Primary Research: Consumer** • 160 consumer connections were conducted including 2 multi-participant focus groups	**USDEC Inputs** • USDEC Regional offices interviewed during research phase