



EXECUTIVE SUMMARY

GLOBAL PIZZA CHEESE LANDSCAPE

OPPORTUNITIES AND BARRIERS FOR
U.S. PIZZA CHEESE EXPORTS



SITUATION ASSESSMENT

Cheese export markets are evolving, with buyer preferences, sustainability demands, supply chains, and competitive dynamics all in flux. **The question is where U.S. suppliers can win next, and which specs, formats, and partners will unlock that growth?**

USDEC's Strategic Insights team commissioned a new global pizza cheese study to update the 2014 baseline. The study measures market size and growth, tracks emerging preferences, maps key international and U.S. chains in export markets, and evaluates competition to identify opportunities and barriers for U.S. exporters.

DEFINITIONS

- **Pizza cheese (varietals):** volume of natural mozzarella, cheddar, parmesan, provolone, string, gouda, and “pizza cheese” blends across all uses; excludes processed and analog.
- **Cheese on pizza:** volume of the same cheeses used specifically as a pizza topping; includes processed and analog used on pizza.

OBJECTIVES

- Assess the global pizza cheese landscape by sizing markets, analyzing growth trends in both pizza cheese and the broader pizza industry, and mapping key operators in target export markets.
- Understand demand drivers and buyer perspectives by exploring purchase motivators, preferences, and emerging trends shaping global pizza cheese consumption.
- Identify opportunities and barriers for U.S. exporters by evaluating competitive dynamics, supply chain considerations, and sustainability demands.

SCOPE

13 countries: Australia, Chile, China, Dominican Republic (DR), Egypt, Guatemala, Indonesia, Japan, Mexico, Philippines, Saudi Arabia (KSA), South Korea, United Arab Emirates (UAE).

Timeline: Interviews conducted August – November 2024, analysis and reporting December 2024 – September 2025.

METHODOLOGY

This analysis draws on the following primary and secondary research components:

Trade interviews: 165 trade interviews conducted both in-person and virtually. Interviews were split as follows: manufacturer/importer/distributor: 30%, retailers: 15%, foodservice: 45%, other: 10%.

Consumer touch points: 160 consumer connections were conducted including 2 multi-participant focus groups

USDEC office interviews: China, Japan, Mexico, Middle East and North Africa (MENA), South America, Southeast Asia (SEA), and South Korea.

Secondary data: Trade Data Monitor (TDM) import and export data, industry reports, media articles, local trade data consulted for each country.

USDEC Proprietary Data: Global Cheese Database

SUMMARY OF KEY LEARNINGS

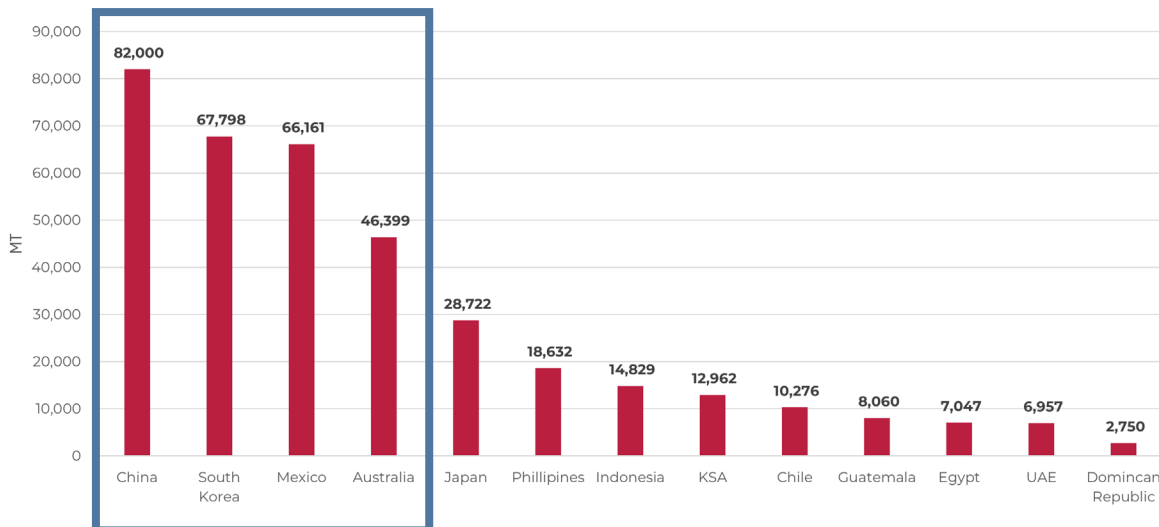
1. Australia, Mexico and Japan are the largest markets for pizza cheese varietal consumption. Mexico and Australia will see the largest volume gains of pizza cheese varietals consumption through 2026.

PIZZA CHEESE VARIETALS CONSUMPTION: 2021-2026F ACROSS ALL MARKETS

Consumption MTs	2021	2022	2023	2024	2025(f)	2026(f)	Volume +/- 2021-2026	CAG 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	128,283	130,173	(6,053)	-0.9%
China	74,961	62,318	77,172	82,841	88,259	93,802	18,841	4.6%
DR	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%
Phillippines	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%

2. Across the markets analyzed, China, South Korea, Mexico, and Australia are the four largest cheese-on-pizza markets and together account for ~70% of total volume.

CHEESE ON PIZZA VOLUME 2024



MARKET OPPORTUNITY: RESULTS

To compare the current situation and potential opportunity across markets, a standardized scorecard was developed. This applies a consistent approach using the same 12 criteria and scoring convention for each country in the study. Each criterion received a score from 1 to 5, with the exception of tariff and non-tariff barriers, which received a score of 1 to 4. These were then totaled to produce a final score ranging from 12 to 58.

The table below outlines the 12 criteria included in the scoring framework; while it does not show the 1–5 ratings assigned, each criterion contributed to the final score. For instance, for geographic diversity, having more significant cities is an indicator of a more appealing opportunity, so China's 6+ major cities received a score of 5, while Guatemala's 1 major city received a score of 1.

Note: Scoring key and criteria definitions are available in the market-specific chapter published on [USDEC.org](https://usdec.org).

MARKET SCORES

Criteria	Australia	Chile	China	Dominican Republic	Egypt	Guatemala	Indonesia	Japan	KSA	Mexico	Phillippines	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 *													
Tariff Barriers *													
Price Sensitivity	Mod/ Low	Mod/ High	Mod/ High	High	Very High	Very High	Mod/ High	Mod	Mod	Mod	High	Mod / High	Mod

* Tariff and non-tariff barrier ratings in this report are as of December 2024. For real-time updates, refer to USDEC Trade Policy's [tariff tracker](#).

MARKET RANKINGS, CHALLENGES, & OPPORTUNITIES

The table below summarizes the final score out of 58 for each country, providing a comparable view of overall market attractiveness. Alongside the scores, key challenges and opportunities are highlighted, all drawn from the trade interviews conducted as part of this study.

Country	Score / 58	Challenges	Opportunities
South Korea	51	- European competition. - A small pool of buyers are able to buy full containers. - There's a preference for fixed/contract pricing.	- A steady and ongoing reliance on cheese imports. - Gouda is supplied primarily by non-U.S. origins creating an opportunity for U.S. gouda to take share. - Heavy cheese use per pizza and overall high volume of consumption.
Mexico	49	- New regulations and price volatility. - U.S. already holds a strong share so the majority of growth will come from increased consumption.	- Large, U.S.-accustomed market. - Key growth areas include frozen and home-prepared kits. - There's a growing demand for premium cheese varieties for gourmet pizzas.
Australia	46	- Rapid industry consolidation. - Strong "Australian-made" presence (higher impact at retail). - New Zealand has geographical advantages.	- Large per-capita pizza consumption. - Expanding home/retail pizza consumption. - Ready acceptance of U.S. "white" mozzarella.
Japan	46	- Fixed-price expectations. - Persistent price sensitivity makes spot-priced U.S. offers harder to land.	- A range of cities and urban areas. - Supply shortages of fresh mozzarella from Italy. - Italian restaurant buyers are price motivated, creating potential for gaining share via partnerships with importers and distributors.
China	40	- Freight and tariff disadvantages versus Oceania. - Low U.S. market share. - Rising local production.	- Increasing demand for quality dairy driven by evolving dietary preferences. - New technologies allow producers to better control fat and salt levels to create custom pizza blends.
Chile	37	- High price sensitivity. - Strong EU/Brazil/Argentina competition. - Distribution/shelf-space hurdles constrain expansion.	- Growth in wealth and a modern economy support foodservice expansion. - There are distinct opportunities for specialty formats and cheese blends.
UAE	34	- Rising regional competition through KSA and Bahrain. - Cost pressures are pushing parts of the value chain toward analog/processed alternatives.	- Import-reliant and open market. - Diverse consumer base with positive perceptions of U.S. cheese. - Expanding retail and ready-to-eat/frozen channels.

Country	Score / 58	Challenges	Opportunities
Philippines	34	• Big chains already tied to suppliers. • AU/NZ competition is strong and crowded market makes entry costly.	• Open access and receptive distributors. • Hotel, restaurant, and cafe/catering (HoReCa) is a first entry point to pilot before targeting mainstream chains.
Saudi Arabia (KSA)	33	• Demand for Halal-certified cheeses. • Price competition via the EU. • Moderate trade barriers.	• Western cuisine and QSR growth. • Increased presence of cloud kitchens. • Vision 2030 tourism expansion is fueling demand.
Dominican Republic	33	• Most imports face an 18% tax (ITBIS), raising prices. • New Colombian supply is intensifying price competition.	• CAFTA-DR has eliminated tariffs in 2025. • Strong presence of leading American pizza companies. • There's demand for better quality cheese.
Indonesia	28	• Favors blends that include analogs due to price sensitivity. • Complex multi-island logistics that requires strong partnerships.	• Young population, expanding middle class, and increasing tourism. • Relatively immature pizza market. • The bakery sector is emerging as a new opportunity, with chains now offering sliced pizza.
Guatemala	26	• High price sensitivity. • High domestic mozzarella self-sufficiency. • Cheese imports require permits.	• U.S. is a leading and supplier. • Zero tariffs in 2025 with CAFTA-DR. • Strong demand for high-quality cheese. • Opportunities with premium or specialized cheese blends.
Egypt	23	• High tariff and non-tariff barriers. • Currency constraints and struggling economy. • Struggles to find exporters to serve low volume orders for higher quality mozzarella.	• Premium chains seek natural mozzarella. • Egypt can serve as a longer-term hub into Africa. • The market continues to develop and modernize.

SUMMARY OF KEY THEMES

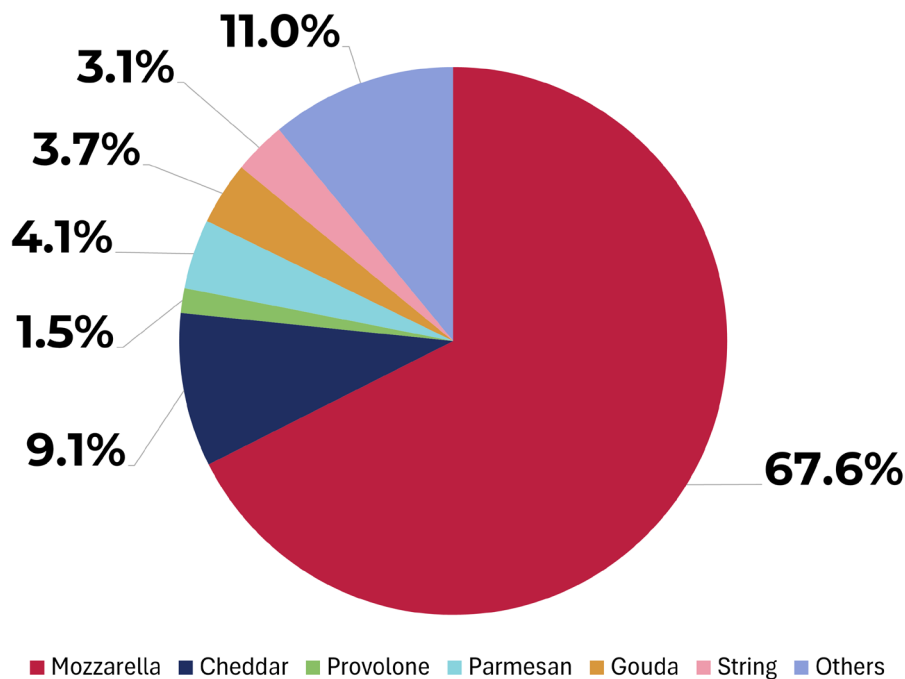
1. Cheese on pizza moves beyond mozzarella

Cheddar, parmesan, and provolone are common across many markets.

Gouda appears meaningfully in Japan (5,026 MT), South Korea (4,068 MT), and Chile (771 MT). String cheese supports stuffed crust in China (8,200 MT), South Korea (1,718 MT), and Guatemala (403 MT). Indonesia shows notable processed cheese use (1,424 MT), and the Philippines frequently uses analog/vegetable-oil mozzarella blends (7,852 MT).

Other styles also appear at smaller volumes such as burrata, ricotta, cream cheese, feta emmental, blue, romy, asiago, fontina, romano, edam, Jack, camembert, gorgonzola, pecorino, and local cheeses such as asadero and oaxaca in Mexico.

CHEESE USED FOR PIZZA: ALL MARKET VOLUME SHARE % (2024)

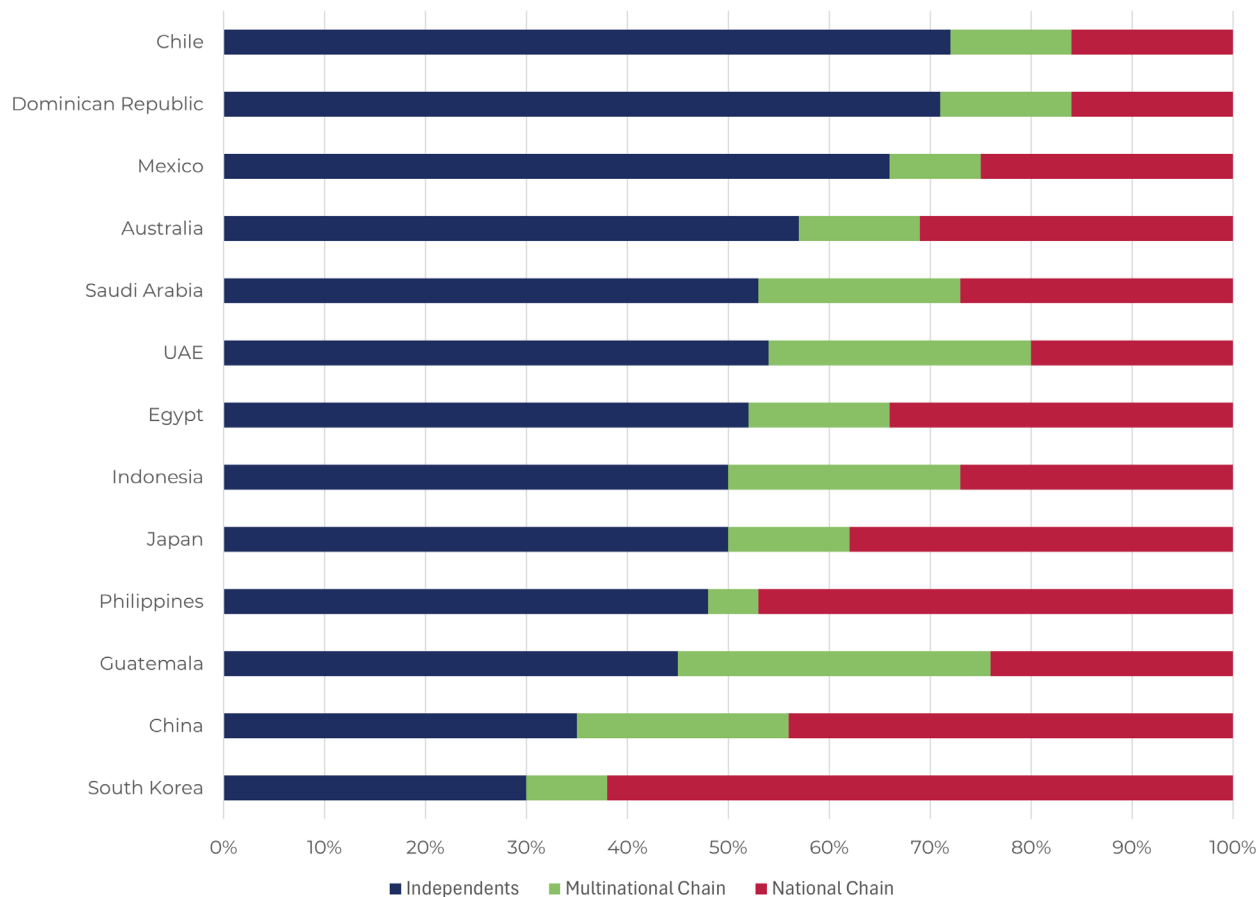


2. Pizza outlet landscape is overwhelmingly independent

While multinationals often over-index on value, by number of outlets **independents are the largest segment in 11 of 13 markets** (~50–70% of outlets). Only South Korea and China skew chain-led. Multinationals remain a minority by outlet count in most places, with their highest shares in Guatemala (31%), UAE (26%), Indonesia (23%), China (21%), and Saudi Arabia (20%).

PIZZA OUTLETS BY CATEGORY 2024

Note: Shares shown are by outlet count, not sales value.



3. Digital ordering and delivery drive sustained growth

App-enabled ordering and robust delivery networks have made pizza the go-to convenience meal, especially for younger consumers. COVID accelerated adoption, and those delivery-led gains have largely persisted.



CONCLUSION

U.S. pizza-cheese exports have strong potential across global markets.

The largest near-term volume sits in mozzarella for foodservice and retail, with targeted upside in specialty styles and blends. Capturing this potential requires alignment with local market dynamics and addressing challenges. Consistent quality and performance, reliable supply, and partnership-led routes to market are critical enablers.

Growth strategies should be tailored to each organization's goals, capabilities, and timeline for sustained market development.

Note: In-depth reports are available with market-specific insights such as pizza variety market share, total addressable market, buyer preferences and drivers, consumer trends, and frequency of usage occasions across Australia, Chile, China, Dominican Republic, Egypt, Guatemala, Indonesia, Japan, Mexico, Philippines, Saudi Arabia, South Korea, and the United Arab Emirates.