



Global Sheep Milk Cheese Market

Market size, segmentation, competitive landscape and outlook

2021-2031

Moving forward, together



Every one of us has, at some point, heard the line from *Alice in Wonderland*: “It takes all the running you can do, to keep in the same place. If you want to get somewhere else, you must run at least twice as fast.” Cliché as the quote has become, our world is changing at extraordinary speed. And yet, to my mind, it matters not only to run fast, but — more importantly — to know where you are running.

We see ourselves as the navigator, ready at the right moment to point out the correct course. By providing current, timely information for the decisions that matter, we aim to protect our clients from missteps and to help them find new opportunities.

It matters to us that you are satisfied with the work we have done. If you have any questions about this report, we will be glad to answer them.

ANDREY SHEVCHENKO, Managing Partner

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Indicator	Value
Market size (2024)	USD 8.7 bn
Forecast (2031)	USD 13.5 bn
CAGR (2021-2031)	6.4%
Study period	2021-2031
Largest region	Europe · 66.8%
Fastest-growing region	Asia-Pacific · 8.7%
Market concentration	Moderate
Licence	Individual / Company

The global sheep milk cheese market reached USD XXX billion in 2024 and will expand to USD XXX billion by 2031, advancing at a XX% CAGR. Europe accounts for XX% of market value, supported by established PDO supply chains for Feta, Pecorino Romano, Manchego and Roquefort. Premiumization, international demand for Mediterranean foods and wider specialty-retail distribution are lifting value realization, while constrained milk supply and declining ewe inventories reinforce the category's premium pricing. Asia-Pacific is the fastest-growing regional market, with imports, upscale foodservice and modern gourmet retail driving an XX% CAGR.

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Executive summary

The global sheep milk cheese market reached USD XXX billion in 2024 and will expand to USD XXX billion by 2031, advancing at a XX% CAGR. Europe accounts for XX% of market value, supported by established PDO supply chains for Feta, Pecorino Romano, Manchego and Roquefort. Premiumization, international demand for Mediterranean foods and wider specialty-retail distribution are lifting value realization, while constrained milk supply and declining ewe inventories reinforce the category's premium pricing. Asia-Pacific is the fastest-growing regional market, with imports, upscale foodservice and modern gourmet retail driving an XX% CAGR.

Indicator	Value
Market size 2024	XXX
Forecast 2031	XXX
CAGR	XXX
Largest region	XXX
Fastest region	XXX

Key findings

- Global sheep milk cheese sales reached USD XXX billion in 2024 and will reach USD XXX billion in 2031.
- Global market volume totaled XXX tonnes in 2024 and will rise to XXX tonnes by 2031.
- Europe generated XX% of global market value in 2024, reflecting its concentration of protected-origin production and mature domestic consumption.
- Feta and white-brined cheeses represented XX% of 2024 value, the largest product segment.
- PDO, PGI and other certified-origin products accounted for XX% of global value in 2024.
- Eurostat recorded XXX tonnes of ewe milk produced on EU farms in 2024.
- The European Union held XXX sheep in 2024, XX% fewer than in 2023 and XX% fewer than in 2014, according to Eurostat.
- Spain's Ministry of Agriculture recorded XXX litres of sheep milk declared by first purchasers in 2024, an increase of XX% year on year.

Market size and forecast

Market value by year, USD bn

Indicator	2026	2027	2028	2029	2030	2031	CAGR
Market value, USD bn	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Market volume	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Production	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Imports	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Exports	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Apparent consumption	XXX	XXX	XXX	XXX	XXX	XXX	XXX

Source: XXX

Year-over-year value change

Indicator	2027	2028	2029	2030	2031	CAGR
Market value	X%	X%	X%	X%	X%	X%
Production	X%	X%	X%	X%	X%	X%
Imports	X%	X%	X%	X%	X%	X%
Exports	X%	X%	X%	X%	X%	X%

Source: XXX

Global Sheep Milk Cheese Market Trends and Growth

Drivers

Sheep milk cheese sits at the intersection of constrained agricultural supply and expanding premium-food demand. Production is concentrated in Mediterranean and European mountain regions where breed, pasture, climate and protected-origin rules define both product identity and the practical ceiling on output. This structure supports attractive value per kilogram but makes the category unusually sensitive to farm exits, feed conditions and seasonal milk availability.

Demand is broadening beyond traditional consuming countries. Feta has become a global foodservice ingredient, Pecorino is gaining from Italian cuisine and grated applications, and Manchego has developed a durable premium export franchise. Retailers are extending this momentum through portioned packs, curated cheese counters and digital assortments that make regional products accessible without removing their provenance premium.

The competitive advantage is shifting from processing scale alone toward control of milk supply, origin authenticity, export execution and consumer-friendly formats. Large groups bring distribution and brand investment, while regional cooperatives and independent makers protect differentiation through local sourcing, aging expertise and direct relationships with specialist buyers.

Growth drivers

PDO-led premiumization

Protected-origin cheeses translate scarcity, provenance and production discipline into higher realized prices. Producers with PDO access and export-ready brands are gaining value faster than undifferentiated bulk suppliers, particularly in the United States, Northern Europe and affluent Asian cities.

Mediterranean cuisine globalization

Feta salads, pasta dishes using Pecorino, tapas boards and regional European menus have moved into mainstream foodservice and home cooking. This expands both ingredient demand and consumer familiarity, creating a route from restaurant trial to packaged retail purchase.

Specialty retail distribution

Premium supermarkets, cheese counters, gourmet chains and online specialty retailers are giving sheep milk varieties more shelf space and stronger product education. Assortment growth is especially important outside Europe, where consumer awareness previously depended on restaurants and independent importers.

Foodservice recipe integration

Sheep cheese is increasingly specified as a repeat-use ingredient in salads, burgers, flatbreads, pasta, bakery products and sharing plates. Standardized crumbles, grated packs and portioned blocks reduce

kitchen labor and make the category easier for chains and institutional operators to adopt.

Distinctive nutrition and flavor positioning

Consumers seeking intense flavor, traditional fermentation and alternatives within dairy are supporting trial of sheep milk cheese. The category's higher fat and protein density enables smaller serving sizes and a premium sensory proposition that is difficult for commodity cheese to replicate.

Convenient consumer formats

Resealable wedges, crumbles, slices, grated products and single-serve portions reduce waste and lower the knowledge barrier associated with cutting and serving specialty cheese. Format innovation is raising purchase frequency among smaller households and younger urban consumers.

Restraints

Structural milk-supply scarcity

Sheep milk production is seasonal, geographically concentrated and less scalable than cow milk production. Limited raw-milk availability restricts plant utilization, raises procurement competition and caps expansion in protected production zones.

Shrinking European ewe population

Eurostat recorded a XX% reduction in the EU sheep population between 2014 and 2024. Farm exits, labor intensity and weak succession pipelines reduce the number of specialized dairy flocks and increase processors' exposure to regional supply disruptions.

Elevated production and aging costs

Feed, energy, labor, financing and refrigerated storage costs are amplified in cheeses requiring extended maturation. Price increases protect processor margins but can slow household purchase frequency and encourage substitution with cow-milk cheese.

Trade and cold-chain friction

Veterinary certification, tariff exposure, refrigerated logistics and short remaining shelf life raise landed costs outside established trade corridors. Smaller cheesemakers face the greatest difficulty maintaining distributor economics across fragmented overseas markets.

Origin-name dilution and imitation

Generic or misleading use of names associated with protected European cheeses weakens price signaling and confuses consumers. Stronger enforcement supports legitimate producers, but enforcement and litigation costs remain material in large export markets.

Driver and Restraint Impact on the Sheep Milk Cheese Forecast

Drivers — impact on forecast

Driver	Impact on CAGR	Geography	Horizon
PDO-led premiumization	XXX	XXX	XXX
Mediterranean cuisine globalization	XXX	XXX	XXX
Specialty retail distribution	XXX	XXX	XXX
Foodservice recipe integration	XXX	XXX	XXX
Distinctive nutrition and flavor positioning	XXX	XXX	XXX
Convenient consumer formats	XXX	XXX	XXX

Source: XXX

Restraints — impact on forecast

Restraint	Impact on CAGR	Geography	Horizon
Structural milk-supply scarcity	XXX	XXX	XXX
Shrinking European ewe population	XXX	XXX	XXX
Elevated production and aging costs	XXX	XXX	XXX
Trade and cold-chain friction	XXX	XXX	XXX
Origin-name dilution and imitation	XXX	XXX	XXX

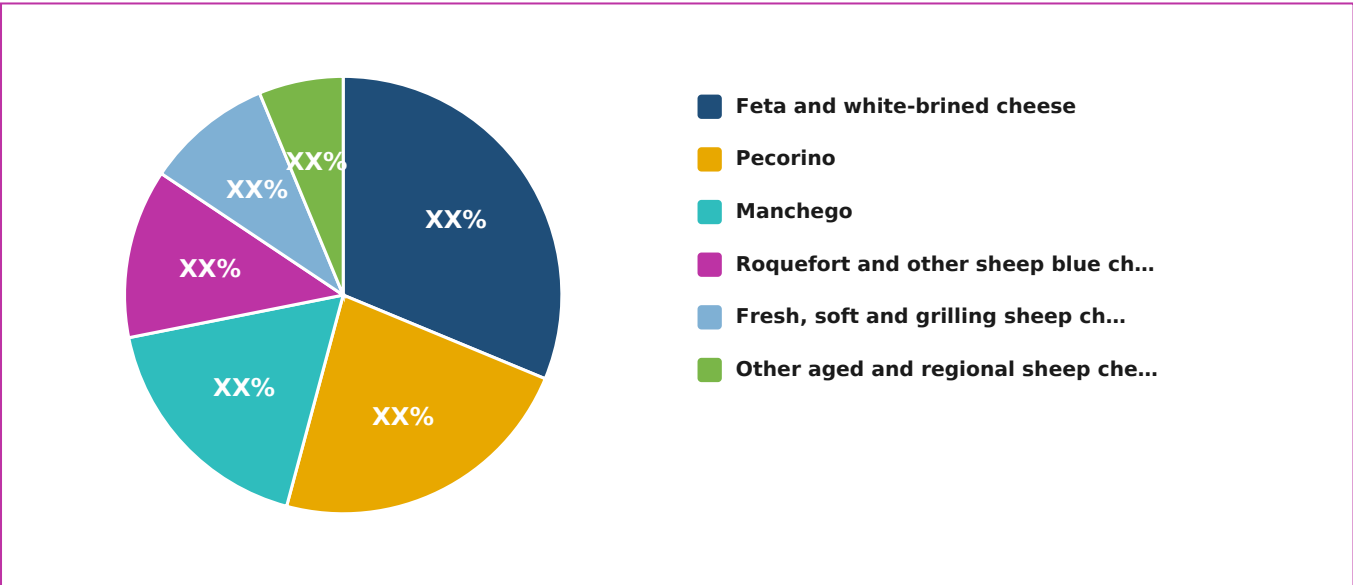
Source: XXX

Sheep Milk Cheese Market Segmentation Analysis

By Product Type

Feta and related white-brined cheeses lead through high household penetration, broad foodservice use and export-ready formats. Pecorino benefits from both table-cheese and grated-ingredient demand, while Manchego and Roquefort command higher values per kilogram through origin credentials and extended maturation. Fresh, soft and grilling varieties are expanding fastest as producers develop approachable formats for new consumers.

Value share by product Type, 2024



Source: XXX

Value by product Type, USD bn

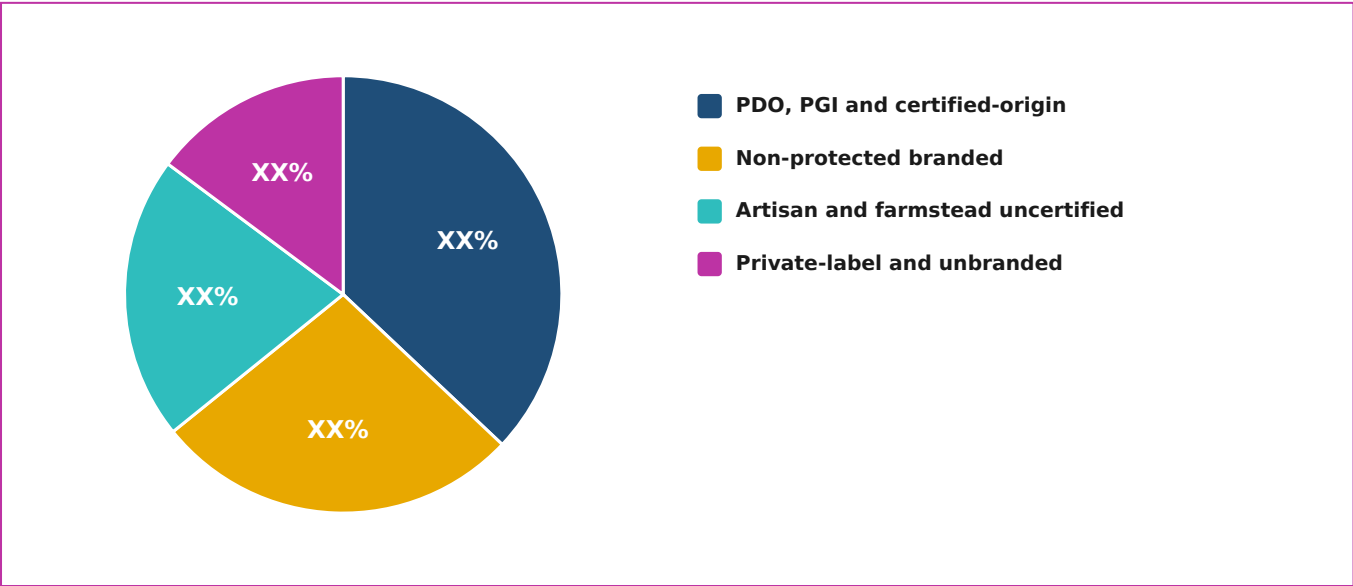
Segment	2026	2027	2028	2029	2030	2031	Share 2024	CAGR
Feta and white-brined cheese	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Pecorino	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Manchego	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Roquefort and other sheep blue cheese	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Fresh, soft and grilling sheep cheese	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Other aged and regional sheep cheese	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX

Source: XXX

By Certification and Origin Status

Protected-origin products lead value because controlled geography, milk sourcing and aging rules support premium price realization. Non-protected branded cheese is gaining through accessible retail formats and flexible production, while artisan and farmstead products remain a high-value niche with strong direct-channel economics. Certified-origin share will remain above half of global revenue through 2031.

Value share by certification and Origin Status, 2024



Source: XXX

Value by certification and Origin Status, USD bn

Segment	2026	2027	2028	2029	2030	2031	Share 2024	CAGR
PDO, PGI and certified-origin	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Non-protected branded	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Artisan and farmstead uncertified	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Private-label and unbranded	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX

Source: XXX

By Format

Traditional blocks and wheels dominate aging, foodservice cutting and specialty-counter sales. Consumer convenience is shifting incremental demand toward crumbles for salads, grated Pecorino for cooking, sliced packs for sandwiches and individually portioned snacks. Format innovation also improves price realization by moving sales from bulk cheese into branded, recipe-specific packs.

Value by format, USD bn

Segment	2026	2027	2028	2029	2030	2031	Share 2024	CAGR
Blocks and wheels	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Wedges and retail portions	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Crumbled and diced	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Grated and shredded	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Sliced, snack and other formats	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX

Source: XXX

By Distribution Channel

Supermarkets lead through Feta, Pecorino, Manchego and private-label availability, while specialty stores retain disproportionate influence in premium aged and farmstead cheese. Foodservice is the second-largest route when restaurants, hotels, catering and industrial kitchens are combined. Online specialists and producer-direct channels are growing fastest by aggregating fragmented artisan supply and supporting discovery through curated assortments.

Value by distribution Channel, USD bn

Segment	2026	2027	2028	2029	2030	2031	Share 2024	CAGR
Supermarkets and hypermarkets	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Foodservice	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Specialty cheese and gourmet retail	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Convenience and other food retail	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Online and direct-to-consumer	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX

Source: XXX

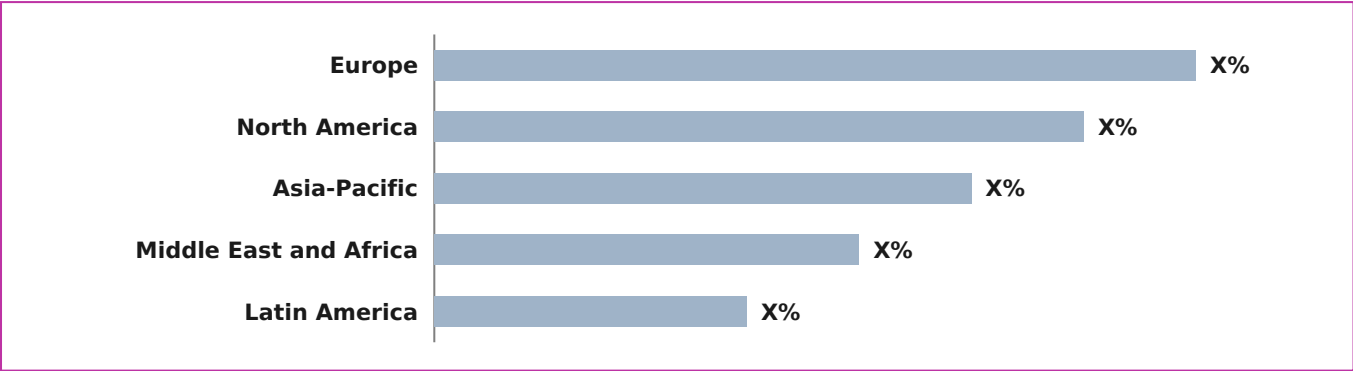
Sheep Milk Cheese Market Regional Analysis and Country Outlook

Europe generated USD XXX billion in 2024, equal to XX% of global value. Greece, Italy, Spain and France anchor the region through Feta, Pecorino, Manchego and Roquefort, while the Balkans and Eastern Europe contribute substantial white-brined and traditional farmstead production. Protected designations, established consumption occasions and short routes between milk pools and processors sustain Europe's leadership, although farm consolidation and declining ewe inventories keep supply disciplined.

North America accounted for XX% of 2024 value and is the largest premium import market outside Europe. The United States combines strong demand for Manchego, Feta and Pecorino with a growing domestic artisan segment led by specialty creameries. Supermarket deli counters, Mediterranean quick-service concepts and restaurant usage support scale, while direct-to-consumer cheese clubs improve access to high-priced farmstead products.

Asia-Pacific is forecast to grow at XX% annually through 2031. Japan and Australia provide the region's established specialty-cheese base, while China and South Korea supply the largest incremental opportunity through premium retail, Western dining and hotel foodservice. The Middle East also records above-market growth because Feta-style and white-brined sheep cheeses fit existing culinary habits, although price competition from mixed-milk products remains intense.

Growth rate by region, 2024-2031



Source: XXX

Market value by region, USD bn

Region	2026	2027	2028	2029	2030	2031	Share 2024	CAGR
Europe	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
North America	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Asia-Pacific	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Middle East and Africa	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Latin America	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX

Source: XXX

Market value by leading country, USD bn

Country	2024	2031	Share 2024	CAGR
United States	XXX	XXX	XXX	XXX
Germany	XXX	XXX	XXX	XXX
United Kingdom	XXX	XXX	XXX	XXX
Belgium	XXX	XXX	XXX	XXX
Netherlands	XXX	XXX	XXX	XXX
Japan	XXX	XXX	XXX	XXX
China	XXX	XXX	XXX	XXX
Mexico	XXX	XXX	XXX	XXX

Source: XXX

Sheep Milk Cheese Market Competitive Landscape and Company Share

The global market is moderately concentrated: multinational dairy groups lead branded PDO portfolios and export distribution, but thousands of cooperatives, regional dairies and farmstead producers retain meaningful local share. Lactalis has the broadest international position through businesses spanning Roquefort, Feta and Manchego, while Savencia is prominent in Roquefort through Papillon and Sodiaal participates through established French origin cheeses.

Greek suppliers including DODONI, KOLIOS, EPIROS and Hellenic Dairies compete through milk collection networks, Feta PDO credentials and export-scale white-brined cheese production. In Italy, Granarolo, Zanetti and regional Pecorino specialists use protected-origin portfolios and grated or portioned formats to address retail and foodservice. Spanish competition combines large diversified cheese groups with Manchego-focused dairies and cooperatives tied to La Mancha milk supply.

Strategic investment is moving toward automated portioning, recyclable packaging, milk-supply partnerships, export certification and premium brand architecture. Consolidation remains selective because protected-origin specifications limit production relocation, making access to certified milk pools and maturation facilities more valuable than unconstrained commodity capacity.

Leading companies

Company	HQ	Est. revenue 2024	Market share 2024	YoY
Groupe Lactalis	XXX	XXX	XXX	XXX
Savencia Fromage & Dairy	XXX	XXX	XXX	XXX
Sodiaal	XXX	XXX	XXX	XXX
DODONI S.A.	XXX	XXX	XXX	XXX
KOLIOS S.A.	XXX	XXX	XXX	XXX
EPIROS S.A.	XXX	XXX	XXX	XXX
Hellenic Dairies S.A.	XXX	XXX	XXX	XXX
Granarolo S.p.A.	XXX	XXX	XXX	XXX
Zanetti S.p.A.	XXX	XXX	XXX	XXX
García Baquero	XXX	XXX	XXX	XXX

Source: XXX

Sheep Milk Cheese Market Forecast and Commercial Opportunities

The market will add USD XXX billion between 2024 and 2031. Value growth will continue to outpace volume as protected-origin supply remains constrained, maturation costs stay elevated and premium formats gain mix. Feta will remain the largest category, while fresh specialty cheese and convenient Pecorino formats will record the fastest percentage growth.

The base-case forecast assumes gradual recovery in restaurant traffic, stable access to European export markets and disciplined farm-gate pricing. A stronger premiumization scenario would lift the 2031 market above USD XXX billion through faster Asian distribution and branded retail adoption, while a supply-stress scenario would hold volume growth below XX% and shift a larger portion of expansion into price.

Winners will secure multi-year milk relationships, defend origin authenticity, tailor pack sizes to specific channels and maintain reliable cold-chain availability. Exporters that pair flagship PDO products with approachable crumbles, slices and recipe-oriented formats will capture the widest consumer funnel.

Opportunities

- Premium branded sheep cheese in East Asian metropolitan markets
- Snack portions, slices, grated formats and resealable packs
- Certified organic, pasture-based and animal-welfare-positioned products
- Chef-led foodservice applications beyond Mediterranean restaurants
- Direct-to-consumer subscriptions and curated cheese assortments
- Export development for emerging producers in Eastern Europe, the Balkans, Australia and the United States

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