

LE GRUYÈRE[®]
SWITZERLAND 

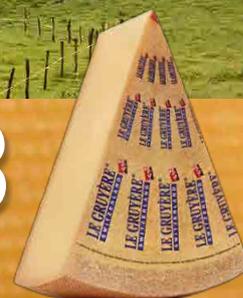
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L'oiseau



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Annual report **2018**
of the Interprofession du Gruyère



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Impressum

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Case postale 12, CH - 1663 Pringy
interprofession@gruyere.com
www.gruyere.com

Editorial board:
Interprofession du Gruyère

Translation:
Ms Sarah Warburton

Graphic design:
Effet-i-media - bepbep@bluewin.ch

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Message from the President

By the time this report arrives at its destination, it will be exactly 20 years since the Gruyère association took the plunge and entered into a newly liberalised dairy market.

Indeed, May 1st 1999 marked the end of the prerogatives of the Swiss Cheese Union (USF) and thus the beginning of a market organization marked by private law provisions. At that time, the association comprised of 226 cheese dairies for a production of 26,648 tonnes and 58 mountain pastures for some 395 tonnes. Today, 161 cheese dairies are able to produce some 30,500 tonnes and 55 mountain pastures some 560 tonnes, as announced for 2019. By way of comparison, the price of milk paid today is between 10 and 15 cents higher than the forecasts announced at the time.

Consequently, sales, mostly abroad, have increased significantly, from 9,200 tonnes to 12,800 tonnes today. At the same time, national consumption has remained constant. This was not a given, as in the mid-2000s there was the complete liberalisation of cheese imports, and this has now increased since then.

This more than encouraging result is undoubtedly due to several factors, including, most significantly, the achievement in July 2001 of the Controlled Designation of Origin (AOC), now Protected (AOP) label. This recognition, linked to the application of the Specifications, has given clear direction to the entirety of the association's work and es-

pecially to the qualitative and marketing strategies. As a result, an evolution has been recorded in accordance with the tradition and intrinsic characteristics of Gruyère AOP.

However, it was clear that in order to move forward effectively, it was necessary to find a path forward based on consensus among the different stakeholders.

Everyone must benefit while ensuring the coherent development of the whole. A place is reserved for each individual in a collective process.

This utopian vision at the time has paid off over the course of the past 20 years. The association is challenging itself to do the same for the next 20 years while guaranteeing the authenticity of Gruyère AOP and the characteristics, which make it a unique product, to the delight of all consumers. It is now up to everyone to take up this challenge.



Oswald Kessler
President of the
Interprofession



General situation

2018 was a year of consolidation for the Gruyère association. After what was a difficult period between 2016 and 2017, it has now been possible to produce at 100% all year while having a responsive market present both in Switzerland and abroad. As a result, the period under review shows a total sale tonnage of more than 30,000 tonnes - a figure never before attained since Gruyère came into being.

The gamble taken in reducing quantities without touching prices during difficult years has been a winning policy in the long term.

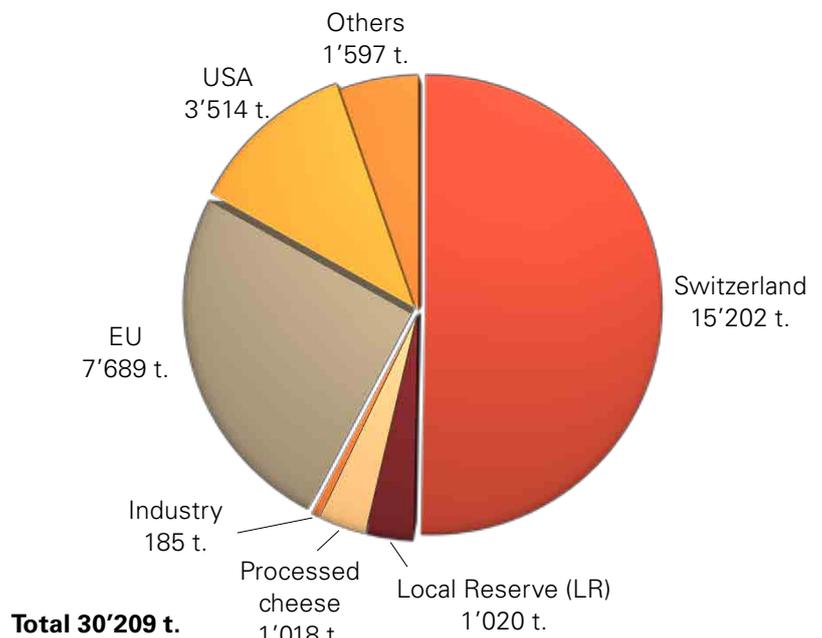
All the work of the Interprofession should be carried out with long-term effects in mind and alongside a deep respect for the tradition, history and intrinsic characteristics of Gruyère AOP. These values create a unique cheese, which stands out in the markets.

This aspect has been clearly identified and excellently popularized in the program "A Bon Entendeur" (ABE) broadcast by RTS at the end of August. The future of Gruyère AOP depends not only on such a clear differentiation of the cheese as this but also on the association behind it. As mentioned several times, Gruyère AOP must be based on structures that retain the human element and operate independently. Any other system would be a move in the wrong direction that would have a direct impact on price and rapidly affect quantities. There are many examples at both national and international level of the evolution of volumes and prices of other types of cheese.

The association defines its strategy on qualitative evolution, meaning a prudent

increase in quantities with a progressive increase in prices so that all actors, producers, cheesemakers and refiners can live decently from their work while covering the investment costs already agreed or to come. Riding on the momentum of this, Gruyère AOP will be able to continue to delight the palates of consumers here and abroad. In this spirit, it has already delighted the various expert juries who once again awarded top honours to a Gruyère d'Alpage AOP - that of the Treboux Family of the Alpage de la Bassine in the foothills of Marchairuz. The Guex family in Châtonnaye's Gruyère AOP was also among the winners for the Gruyère AOP category. The 2018 vintage was excellent.

Repartition of the Gruyère AOP consumption during 2018 in tonnes





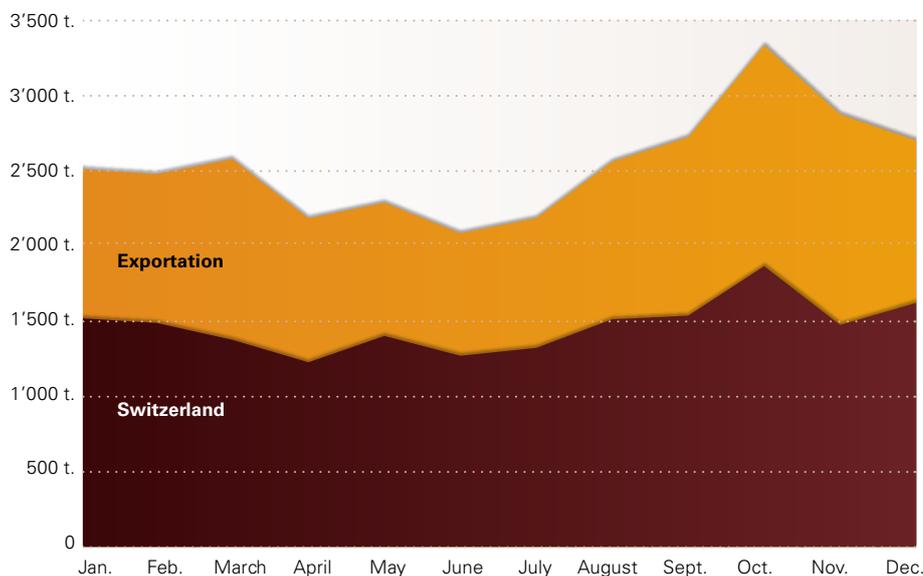
For the future to be bright, the association needs to continue on this trajectory while ensuring optimal framework conditions. As such, the defense and protection of the Gruyère name is an essential building block in the construction and pursuit of the Gruyère AOP market.

Following on from the efforts made by the association over the last few years, it is essential that the federal and national authorities give this subject the importance it, and our noble cheese, deserve.

No international agreement can be concluded to the detriment of the protection of the name Gruyère. We expect our authorities to support this jewel of agricultural production. If this is not the case then all the work accomplished since the start of the successful liberalisation of the cheese market will be destroyed.

In conclusion, even if the current situation is positive, nothing can ever be taken for granted. That is why we must redouble our efforts and maintain a collective response that meets everyone's expectations.

Monthly sales 2018 in tonnes





Quantity management

A strict method of quantity management based upon a 3/9 system has been in use since 2015. In order to avoid the difficulties encountered over the last few years, a more refined management and alert process named 'Cockpit' has been put into place. It is based on stock evolution, the production of actual sales and the market outlook.

Due to this, Gruyère AOP Traditional, Gruyère AOP Bio and Gruyère d'Alpage AOP markets are all treated separately.

According to the new model, the volume attributed in 2018 was 100% for Gruyère AOP Traditionnel and 102% for Gruyère AOP Bio. As a result, 29,893 tonnes were allocated, of which 86 tonnes were of a lesser quality. Of this remaining volume, taking into account the droughts seen over the summer, 29,562 tonnes were actually produced, equivalent to 98.8%. It is worth noting that a renovated dairy took on a new quantity of Gruyère AOP, which was decided according to the principles put into place in 2012.

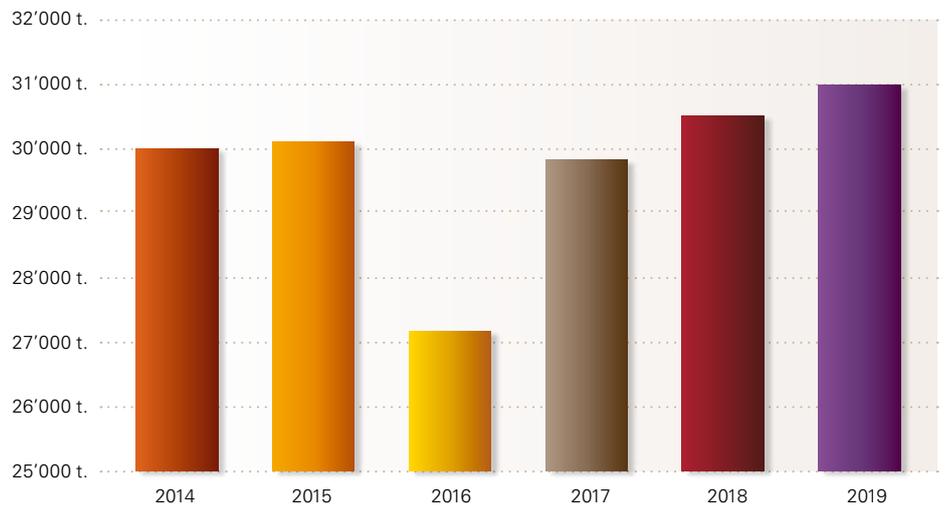
Sales prospects for Gruyère d'Alpage AOP were equally pleasing. It was possible to increase temporarily production by 3% at sites where quality conditions and cheesemakers allowed it. As such, 554 tonnes were allocated for an actual production of 537 tonnes, equivalent to 96.9%. In this case, the lack of water also had a detrimental effect on the total volume produced in certain mountain pastures.

A good overall situation and the strict respect of individual quantities allows us to envisage 2019 in a similar way, whilst adding a final 1% to dairies in line with the overall plan for quantity adaptation.

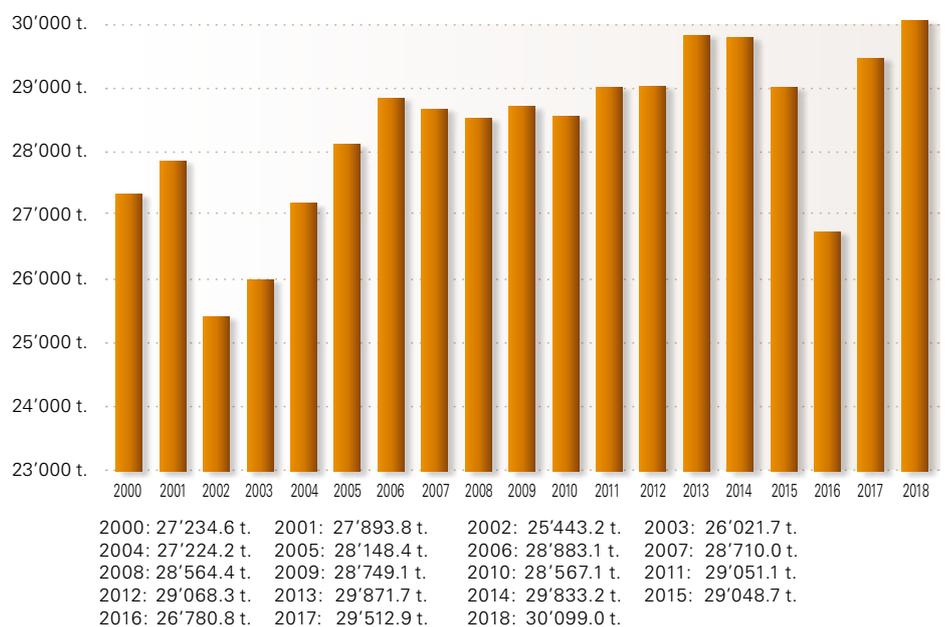
For Gruyère d'Alpage AOP, it will also be possible to repeat the 3% increase.

With the decisions taken at the end of the year, the association is hoping to sell some 500 tonnes more on the different national and international markets.

Allocated volume in tonnes



Total production 2000-2018 in tonnes





Market Situation

As previously mentioned, consumption of Gruyère AOP reached a record in 2018 with some 30,200 tonnes. This is the best figure ever obtained both in Switzerland and abroad. Even the scorching summer did not succeed in curbing consumption, which is encouraging.

Of this total quantity, more than 16,000 tonnes were sold on the national market in both local shops and supermarkets. In Switzerland, Gruyère AOP is the top selling national cheese, despite constant import pressure. This shows that maintaining a significant marketing investment at a country level is proving to be successful. It should be noted that the volumes of Gruyère AOP Bio sold were higher than in previous years. While for 5 years relatively large quantities (50 - 100 tonnes) of this type of product remained unsold, it is now the case that the volume produced falls short of the market's potential. This situation will be monitored to see whether this trend continues in the future so as to enable a suitable response to new consumer trends.

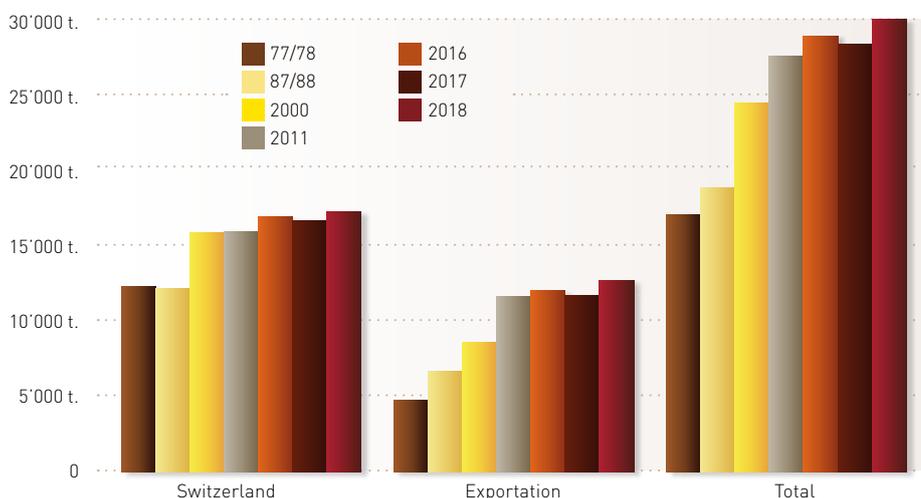
The record sales achieved abroad are based on very high volumes outside the European Union and especially in the United States with some 3,500 tonnes. Sales in countries close to Switzerland are good, with Germany in the lead, where more than 3,200 tonnes were consumed. France, which once again exceeded 1,500 tonnes, shows

a pleasing reversal of the previous trend. Belgium and Great Britain show encouraging figures. For the latter, however, there has been a certain stagnation, certainly resulting from the endless discussions on Brexit. The uncertainties resulting from this situation generate a negative economic trend that is undoubtedly reflected in overall consumption. It is to be hoped that a solution will be devised to restore a certain serenity to this British market and thereby avoid negative developments in the rest of the eurozone. Without a doubt, the work and commitment of those selling Gruyère AOP and achieving such volumes as these is to be congratulated.

Therefore, even if Gruyère AOP is present in some 58 countries, it remains necessary to continue to support work to defend the brand in order to ensure that the volume sold develops positively. In this respect, the sum made available by the Confederation to support such promotion are welcome. However, it is clear that future work will only be rewarded if all stakeholders focus on promoting the 'Gruyère AOP Switzerland' brand.

Another important aspect is the maintenance of export conditions corresponding to the qualities and intrinsic characteristics of this cheese. In certain countries additional standards are being set, which makes it difficult or even impossible to export Gruyère AOP. It is essential that the various cantonal, but above all federal, authorities do everything possible to support and supervise in a positive way the work carried out by the various companies that export cheese. It is thanks to this coordinated work that the association will be able to continue its progress in the future.

Comparison of sales in tonnes





The AOP file and international brand protection

Defending the Gruyère name at a national and international level is an important and essential task for the association. Indeed, the consumer must know at all times what he is buying under the 'Gruyère' name. The aim is to honour the work done by producers, cheesemakers and refiners to comply with the Specifications that are checked by the Intercantonal Certification Body (OIC).

Flawless traceability makes it possible to identify each wheel produced. As a result, we know exactly which producer delivered the milk used to produce it. The Interprofession must enhance this asset in the future.

In order to strengthen consumer confidence, it is all the more important that public controls go in this direction. The Interprofession calls for greater coordination with the cantonal and federal inspection bodies in order to be as effective as possible. Thereby, it also encourages them to support the motion of Mrs. Savary, States Councillor and President of the Association of AOP/IGP. This proposal aims to introduce personal vigilance agents sworn in and paid by Interprofessional organisations that are able to intervene in companies where fraud is suspected. These people will come in support of the public authorities, in the interest of the consumer and his health. At this stage, the Council of States accepted the motion in early 2019 and it is important that the National Council supports this milestone success. This request does not cost the State anything and would increase its efficiency. This should reconcile the different political parties while giving a clear meaning to the application of section 182 of the Agriculture Act.

At an international level, the Interprofession du Gruyère is active in protecting the name 'Gruyère' in all parts of the world. On several issues, it acts in concert with its

French counterpart Gruyère IGP and the government body the 'Institut National pour les protections d'Appellation d'Origine' (INAO). This work is carried out in perfect coordination with the Federal Office of Agriculture, which provides financial support for certain legal steps to defend or register the trademark. The Institute for Intellectual Protection (IPI) plays a significant role in all of these efforts.



In the international coordination of private rights, it is also worth noting the logistical and technical support of the OrigIn association and its national arm, the Swiss Association for the Protection of AOPs/IGPs. Intellectual property related to the ancestral know-how of an agricultural product must be defended with respect for producers and consumers. This point of view was also reiterated during the trip organized by Federal Councillor Schneider-Amman to the Mercosur region. The Director, with the support of Fromarte and the AOP IGPs, stipulated that that no international agreement could be signed without the solid protection of geographical indications. Regardless of this fact, it is essential that no non-tariff barriers remain once an agreement has been reached.

This long-term work was highlighted in a RTS programme, 'A bon entendeur' (ABE), broadcast at the end of August.

It is hoped that the approach initiated in 1992 by the French-speaking cantons when they signed the Charter of Gruyère, which aims to protect Gruyère and the various appellations, will be successful in the coming years. This is a constant and essential battle. All brands and designations of national and international scope must be defended.



The quality of Gruyère AOP

Final product testing and controls

In accordance with the terms of the product Specifications, each lot of Gruyère AOP is subject to appraisal once it reaches an average age of 4 and a half months. This forms the basis for the water-tight product traceability afforded by casein marks. Each cheese wheel is precisely controlled before it is put on the market. A first qualitative assessment is carried out at the 3-month mark when the cheese is removed from the dairy cellars. Grading itself is carried out by committee composed of an appraisal officer from the Interprofession du Gruyère and a co-expert currently working as a cheesemaker. Appeals can be made, after which the cheese is newly examined by the Board of Appeal composed of two representatives of the *affineurs* and a cheesemaker. The verdict is final. This set of proceedings guarantees the objectivity necessary for the qualitative assessment of Gruyère AOP sold on the market. Before leaving the cellars for good, Gruyère AOP wheels face a third assessment carried out by the *affineur*.

This process ensures that only the highest quality Gruyère AOP makes its way onto the consumer's table, be this in Switzerland or abroad.

Overall, the 2018 production of Gruyère AOP Traditional and Bio was of an excellent quality. The decline in the proportion of IB that began in 2014 continued in 2018. Thus, the measures put in place to ensure

the quality of Gruyère AOP are bearing fruit. 98.16% of the batches were classified as IA quality. The proportion of batches scoring 19 points or more increased to 63.43%. The level of 2nd choice was very low. Of the 32 appeals that were filed, less than 50% were won. These various results made it possible to award some 5.4 million francs of quality premiums.

The production of Gruyère d'Alpage AOP was also very good. Thanks to their know-how, the manufacturers have been able to adapt to the varying alpine conditions that changed from a rainy spring to an extremely dry summer. Thus, 95.4% of the production obtained an IA classification. 64.8% of wheels scored 19 points or more. These excellent results are in line with those obtained last year.

These encouraging figures are also due to the excellent work of the dairy producers, cheese makers and refiners as well as the support provided by various advisory bodies, whether Caséi, Arqha or Agroscope.

In order to preserve its authenticity, Gruyère AOP production must guarantee its quality and its market position. The IPG is committed, as are other Interprofessions and umbrella bodies in the cheese and dairy sector, to maintaining cheese culture production in Switzerland. Thus, the Interprofession du Gruyère actively participated in the creation of the Liebefeld Culture AG organisation in November last year. In the very near future, based on the decisions taken by the Confederation, the Interprofession hopes that all support for the production of cheese cultures will be based in Posieux - Grangeneuve.



Chemical analysis

Moisture content and fat content

Systematic testing of the chemical composition of the cheese is carried out on each batch put on the market. 23 analyses were appealed, of which 17 won. It should be noted that more than 2,000 lots are tested over the course of the year. Overall compliance with the levels detailed in the Specifications is tested over an average of 6 months. The objectives assigned to these controls are generally met.

Specific testing

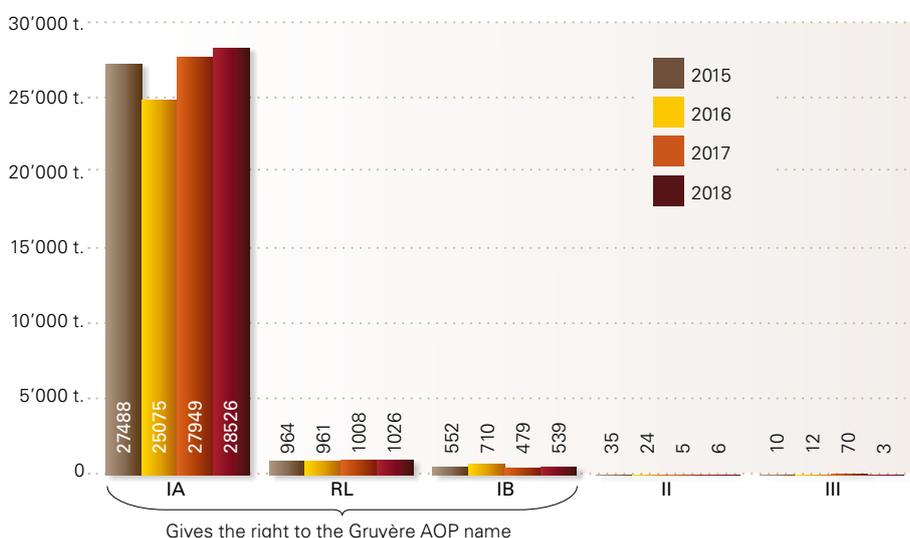
The Interprofession carries out analyses related to the hygienic and bacteriological quality of the cheese. In 2018, testing for the absence of pathogenic products continued. This confirmed that the measures that have been put in place ensure that Gruyère AOP complies with the relevant legal requirements. This is important for the consumer who buys Gruyère AOP, a product

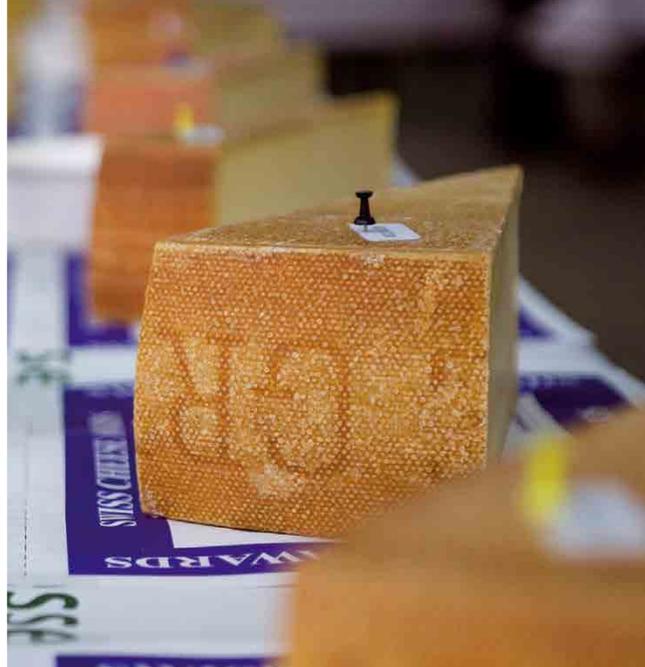
without any additives that is naturally lactose-free and gluten-free.

The Quality Commission

As mentioned in the chapter on the governing bodies of the Interprofession du Gruyère, the Quality Commission and particularly its ad hoc delegation are available to stakeholders within the association to find the best solution to recurring problems on a site. This way of operating guarantees the healthy evolution of the quality of Gruyère AOP.

Comparison of quality by civil year in tonnes





National and international honours for Le Gruyère AOP

The Interprofession du Gruyère is proud to be able to count numerous prize-winners in the different competitions in which it has taken part throughout the year. It would like to congratulate all the members of the association who have helped us achieve these excellent results, made possible thanks to an impeccable milk and an outstanding production and maturation process. The very high quality product, which is emerging, is the best guarantee for the future of Gruyère AOP.

Such distinctions reinforce the positive image of our hard cheese and act as a reminder that quality goes hand in hand with the respect of tradition, nature, a know-how and a rigour in everyday work. Through these competitions, the work of the entire association is rewarded.

World Championship Cheese Contest

At the World Championship Cheese Contest from the 6th to the 8th March 2018 in Madison, Wisconsin (USA), Gruyère AOP won several awards.

Best of class:

- Erich Hunkeler, Sommentier dairy, for his Gruyère AOP matured by Fromage Gruyère SA, Bulle

Second Place:

- Vincent Tyrode, Auberson dairy, for his Gruyère AOP matured by Margot Fromages SA, Yverdon-les-Bains

Third Place:

- Michael Spycher, Fritzenhaus dairy, for his Gruyère AOP matured by Gourmino AG, Reichenbach

International Cheese Awards 2018, Nantwich, England, 24th and 25th July 2018

Gruyère AOP was yet again a medal winner in this large international competition.

Category: Swiss raw milk hard cheese

Gold

Gilbert Golay, Penthérez dairy, matured by Margot Fromages SA, Yverdon-les-Bains

Bronze

Philippe Pasquier, Alpage Le Jeu de Quilles, matured by Fromage Gruyère SA, Bulle

Category: Best Swiss cheese

Gold

Vincent Tyrode, Auberson dairy, matured by Margot Fromages SA, Yverdon-les-Bains

Bronze

Gilbert Golay, Penthérez dairy, matured by Margot Fromages SA, Yverdon-les-Bains

Category: Raw milk hard cheese

Gold

Vincent Tyrode, Auberson dairy, matured by Margot Fromages SA, Yverdon-les-Bains

Category: Retailer

Gold, Silver and Bronze

Jean-Marie Dunand, Le Crêt dairy, matured by Fromage Gruyère SA, Bulle



Swiss Cheese Awards, Lucerne, 28th to 30th September 2018

The Swiss Cheese Awards took place in Lucerne from 28th to 30th September. The title of Swiss Champion goes to Maurice and Germain Treboux of the alpine pastures of La Bassine for their August 2017 Gruyère d'Alpage AOP matured by Fromco SA.

Alexandre Guex, a cheesemaker in Châtonnaye whose production is matured by Cremo Von Mühlennen in Guin, won the Gruyère AOP category. The result obtained by Alexandre Guex confirms the excellent results he has already obtained in various international competitions.

The presence of Gruyère AOP, and especially Gruyère d'Alpage AOP, demonstrates the excellent overall quality of this noble product, and encourages the various players to continue the qualitative approach begun more than 20 years ago with the implementation of the Appellation d'Origine Protégée (AOP).

These cheesemakers are the tip of the iceberg of a multitude of excellent Gruyère AOPs equally as good as those who have won an award:

Category: Le Gruyère d'Alpage AOP

1. Maurice et Germain Treboux, Alpage La Bassine, 1269 Bassins (Swiss Champion)
Matured by Fromco SA, Moudon
2. Didier Meylan, Alpage du Cerney, 1348 Le Brassus
Matured by Magnenat SA, Bulle
3. Martial Rod, Alpage de la Moesettaz, 1348 Le Brassus
Matured by Magnenat SA, Bulle
4. Frédy Hauser, Alpage Combe Noire, 1345 Le Lieu
Matured by Fromco SA, Moudon

Category: Le Gruyère AOP

1. Alexandre Guex, Châtonnaye dairy, 1553 Châtonnaye
Matured by Cremo Von Mühlennen, Guin
2. Claude Kolly, Rossens dairy, 1728 Rossens FR
Matured by Mifroma SA, Ursy
3. Christophe Cujean, Pomy dairy, 1405 Pomy
Matured by Mifroma SA, Ursy
4. Benoît Kolly, Mouret dairy, 1724 Ferpicloz
Matured by Emmi Schweiz AG, Kirchberg
5. Etienne Aebischer, Aebifrom dairy SA, 1147 Montricher
Matured by Fromco SA, Moudon

6. Marc Müller, Farvagny-le-Grand dairy, 1726 Farvagny
Matured by Mifroma SA, Ursy
7. Frédéric Pasquier, Echarlens dairy, 1646 Echarlens
Matured by Mifroma SA, Ursy
8. Christophe Streit, Ropraz dairy, 1088 Ropraz
Matured by Fromco SA, Moudon

OLMA Alpine cheese competition, St. Gallen, 12th October 2018

Every year an alpine cheese competition takes place at OLMA, St. Gallen's large trade fair.

The Gruyère d'Alpage AOP of François Briggen, Alpage Les Fruitières, Nyon, won **third prize** in the hard cheese category.

This cheese was matured by Magnenat SA (Fromage Gruyère SA, Bulle).

The Gruyère d'Alpage AOP of Philippe and Michaël Ruffieux, Alpage Varvalanna, Val de Charmey, won **sixth prize** in the hard cheese category.

This cheese was matured by the Fribourg cooperative of Alp cheeses, Charmey.

World Cheese Awards, Bergen, Norway, 2nd to 3rd November 2018

Le Gruyère AOP won various awards at this large international contest.

Best Le Gruyère Cheese Trophy:

Alexandre Guex, Châtonnaye dairy, for his Gruyère AOP matured by Cremo Von Mühlennen SA, Fribourg

Super Gold medal:

Alexandre Guex, Châtonnaye dairy, for his Gruyère AOP matured by Cremo Von Mühlennen SA, Fribourg

Gold medal:

Franz Jungo, Strauss dairy, for his Gruyère AOP matured by Cremo Von Mühlennen SA, Fribourg, 2 medals

Alexandre Guex, Châtonnaye dairy, for his Gruyère AOP matured by Cremo Von Mühlennen SA, Fribourg

Cremo dairy, for its Gruyère AOP matured by Cremo SA, Fribourg



Adrian Scheidegger, Niedermuhren dairy, for his Gruyère AOP matured by Cremo Von Mühlennen SA, Fribourg matured by Cremo Von Mühlennen SA, Fribourg

Markus Sturny, Lanthen dairy, for is Gruyère AOP matured by Cremo Von Mühlennen SA, Fribourg

Silver medal:

Adrian Scheidegger, Niedermuhren dairy, for his Gruyère AOP matured by Cremo Von Mühlennen SA, Fribourg, 2 medals

Urs Kolly, St. Antoni dairy, for his Gruyère AOP matured by Cremo Von Mühlennen SA, Fribourg

Cremo dairy, for its Gruyère AOP matured by Cremo SA, Fribourg

Gerald Raboud, Courgenay dairy, for his Gruyère AOP matured by Fromco SA, Moudon

Etienne Aebischer, Montricher dairy, for his Gruyère AOP matured by Fromco SA, Moudon

Christophe Suchet, Bonnefontaine dairy, for his Gruyère AOP matured by Lustenberger & Dürst SA, Cham

Bronze medal:

Franz Jungo, Strauss dairy, for his Gruyère AOP matured by Cremo Von Mühlennen SA, Fribourg

Urs Kolly, St. Antoni dairy, for his Gruyère AOP matured by Cremo Von Mühlennen SA, Fribourg

Alexandre Guex, Châtonnaye dairy, for his Gruyère AOP matured by Cremo Von Mühlennen SA, Fribourg

Adrian Scheidegger, Niedermuhren dairy, for his Gruyère AOP matured by Cremo Von Mühlennen SA, Fribourg

Adrien Pagnier, Les Bayards-Duo Vallon dairy, for his Gruyère AOP matured by Fromco SA, Moudon

Emile Brodard, La Roche dairy, for his Gruyère AOP matured par Fromage Gruyère SA, Bulle, presented by Lustenberger & Dürst SA, Cham

Neuchâtel canton's Cheese of Excellence

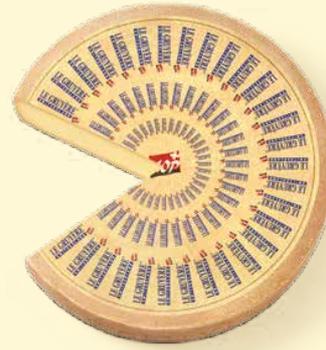
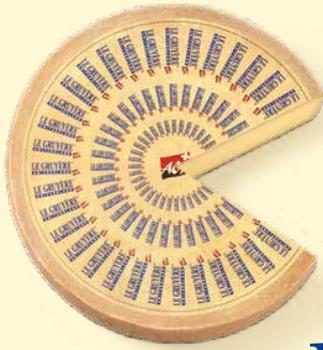
L'Interprofession du Gruyère congratulates Frédéric Lалуque for the honours bestowed on him by the canton of Neuchâtel. His Gruyère AOP from Bémont and matured by Mifroma in Ursy has been named its Cheese of Excellence for 2019.



Vaud Council of State's Cheese of Excellence

The Interprofession du Gruyère is delighted that the Vaud Council of State has this year selected the Gruyère AOP of the Haut-Jorat SA dairy, created by René Pernet and matured by Fromco SA in Moudon, to be its Cheese of Excellence. This Gruyère AOP will be present at official Vaud Council of State events.





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Marketing

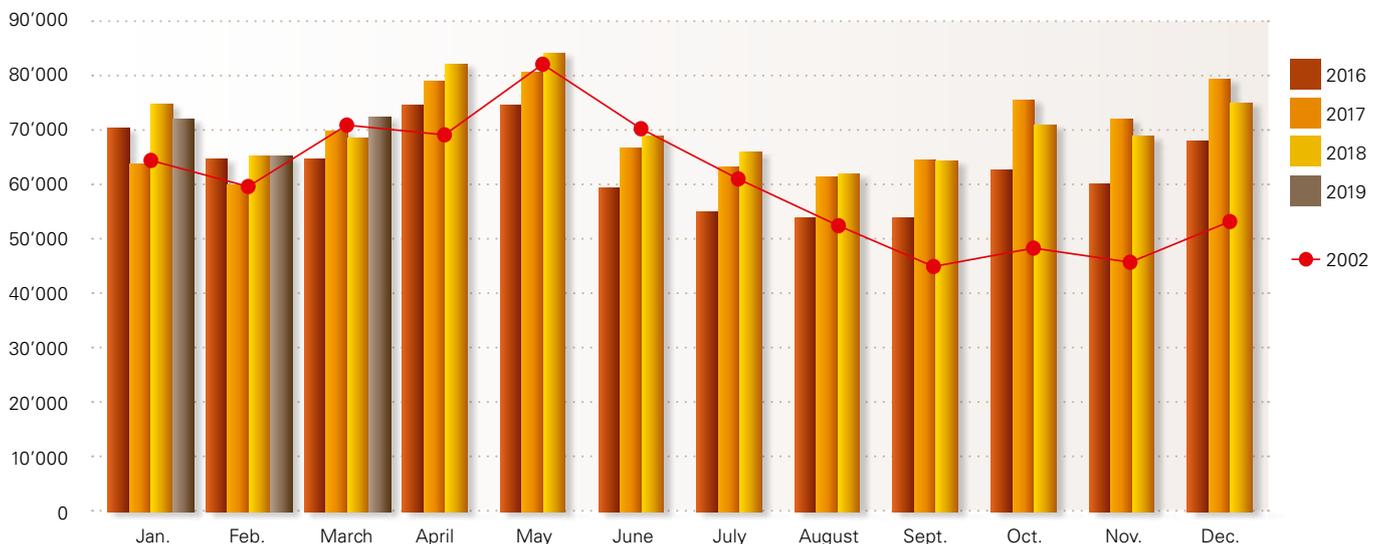
To encourage sales of Gruyère AOP, the association makes significant investments both nationally and abroad.

On a national level, the advertising under the slogan 'Born in Switzerland in 1115' continued. In the first few months of the year, this slogan was broadcast alongside TV weather forecasts in the various regions of Switzerland. In the second half of the year, this campaign was reinforced by a presence in cinemas, a digital campaign and billboards. Despite this promotion being well received by the public, it will have to be changed in the coming years. This is why, in 2019, a new advertising campaign will be selected. Le Gruyère AOP is also present at supra-regional trade

fairs, be that MUBA, LUGA, BEA, ZUSPA, the Moudon Organic Agricultural Fair, the 'Foire du Valais', OLMA, the Slow Food Market, the 'Automnales' or the unmissable 'Salon des Goûts et Terroirs' in Bulle. These activities are coordinated with the Association for the Promotion of AOP/IGP and Switzerland Cheese Marketing (SCM). This activity is in addition to the more regional promotion often carried out by partners in the association, more often than not cheesemakers themselves, who make it possible to discover and above all rediscover the different types of Gruyère AOP, Gruyère AOP Bio and Gruyère d'Alpage AOP. Contact with the consumer is very important. This discovery of the product is further reinforced by tastings

Comparison of production (casein markings)

Number of wheels



organised at supermarkets, particularly on the Swiss-German side.

Clearly, the first ambassadors for Gruyère AOP are those within the association. This is why it is very important that at all levels everyone promote the 'Gruyère AOP Switzerland' brand. For example, branding should be clearly visible on each piece of Gruyère AOP sold, as detailed in the Specifications.

In addition to basic advertising, Gruyère AOP also makes itself known through sponsorship initiatives. The brand was once again highly visible in athletics competitions, both in international meetings like Athletissima in Lausanne and Weltklasse in Zurich, and also in Mille Gruyère, the competition for future hopefuls organised by the Swiss Athletics Federation. The Interprofession also collaborates with the European Athletics Association to promote Gruyère AOP by participating in various competitions organised by this body throughout Europe with a presence trackside for spectators and in all VIP events. One of the highlights of the 2018 season was the European Athletics Championship held in Berlin. For the first time, it was organised in a multi-site format with other European Championships, increasing the audience and television coverage.

Le Gruyère AOP also accompanies Cross-Country Skiing World Cup competitions through several regions. The strengthening of the promotion of Gruyère AOP in the countries of Northern Europe is one of the important aims of this collaboration. The various images broadcast help to consolidate the reputation of the 'Gruyère AOP Switzerland' brand.

The Gruyère European Curling Championship held its last edition in Tallinn, Estonia at the end of November.

As television images of this event are broadcast in the United States, Canada and Asian countries, it was an excellent opportunity to promote the brand. At a national level, the colours of Gruyère AOP are still an emblem of the HC Fribourg - Gottéron team during the National Ice Hockey Championships.

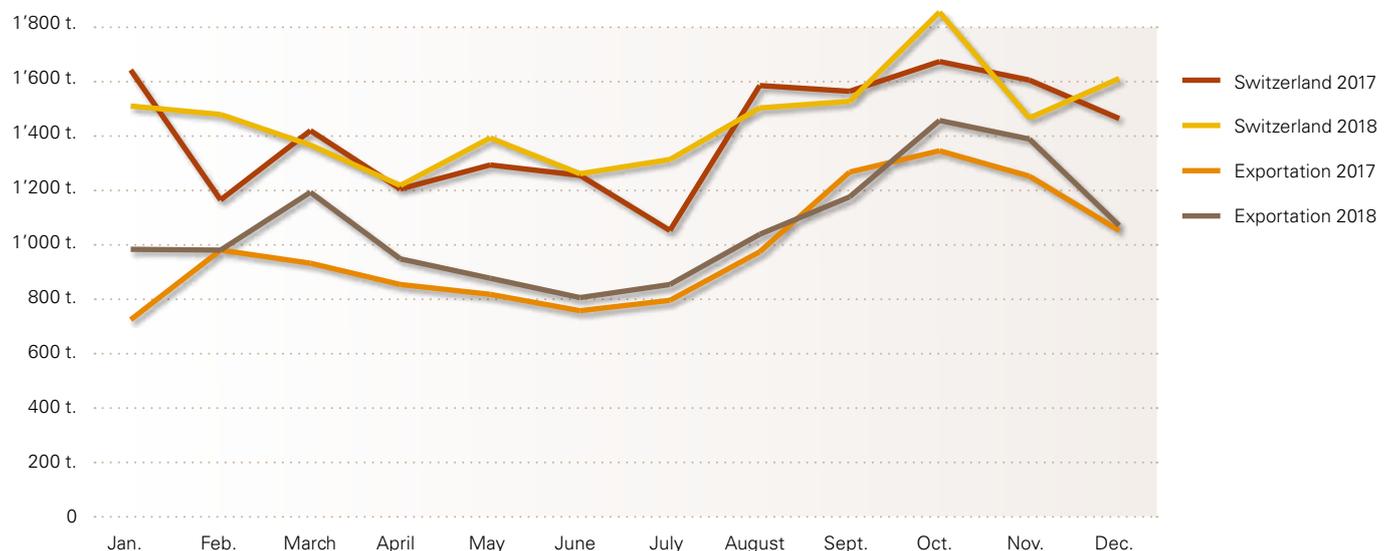
Event sponsorship is an excellent way to increase the brand's visibility through product visibility directly on the site or even on the various podiums.

On a cultural level, Gruyère AOP is also present at the Paléo festival in Nyon where the Hot Fondue delights festivalgoers. This was also the case at Zermatt Unplugged, where as a prelude to the concert, everyone could enjoy a tasty Gruyère AOP fondue. In this same international tourist destination, each visitor takes electric buses in the brand's colours year-round. In 2018, the buses celebrated their 30th anniversary, and this opportunity to celebrate on the Zermatt station square highlighted the excellent collaboration between Zermatt and Gruyère AOP for the happiness of tourists from all over the world.

The Interprofession du Gruyère invests significant resources abroad and is supported by federal funds linked to its cooperation with Switzerland Cheese Marketing.

In Germany, promotional activity is focused on publiprint advertising, tastings in the field and above all the large-scale distribution of merchandising in the western and southern part of the country. The decision has been taken to extend this to the whole of Germany. This activity is carried out in collaboration with Emmentaler AOP, Appenzeller AOP and Tête de Moine AOP and aims to support the distribution of these Swiss cheeses. Germany represents about 10% of Gruyère AOP sales. In the future, it is essential that sales be strengthened with Switzerland's leading

Sales 2017-2018 in tonnes



economic partner. The European Athletics Championships held in August in Berlin provided an opportunity to create special activities in preparation for this event as well as during the event itself.

The French market experienced a renewed interest in Gruyère AOP in 2018. Thanks to a new level of awareness of the situation by the various members of the association and sales associates, it has been possible to reverse the negative trend observed in recent years. It is to be hoped that the shift and efforts made by the promotion, which is based on a new advertising strategy and field presence of merchandisers, will be able to increase this encouraging trend in volumes in 2019. Le Gruyère AOP is still present at the 'Salon de l'Agriculture' and in 2018 will be at the 'Salon du Fromage' and at the AOP-IGP Market in Bourg-en-Bresse. As is the case every 2 years, it was also present at the SCM stand at the International Food Exhibition (SIAL), which takes place in autumn in Paris.

The Benelux represents an excellent market for Gruyère AOP. It met expectations in 2018. The cheese is very well distributed among the various retailers in Belgium and the Netherlands. Promotional work carried out in collaboration with the SCM subsidiary supports a presence in supermarket distribution as well as in specialised stores through more targeted activity in collaboration with Belgian cheese retailers.

Activities in Italy and Spain have not been increasing sales. As announced last year, significant reflection will be carried out with SCM on the promotional structure to be used in these two countries.



Great Britain remains an attractive country for Gruyère AOP sales. Uncertainties related to Brexit weighed somewhat on the volume sold in 2018. This did not prevent the continuation of promotional activity aimed at making the product attractive to the end consumer but also to be present in the mass retail sector.

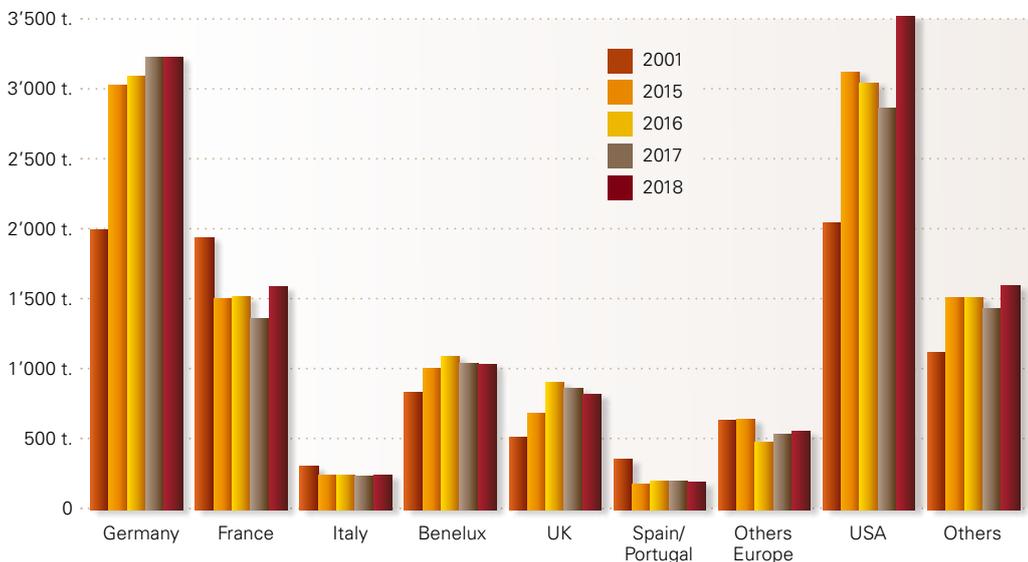
The Interprofession du Gruyère has continued its approach in the various countries labeled 'new markets' and with regards to export initiatives. It is supported by the Confederation's programme.

This approach aims to increase sales of Gruyère AOP and, above all, to find new outlets. Particular emphasis is being placed on the Nordic countries and the United States.

Customised activity is also being carried out in Russia where there are some export problems related to more technical and administrative aspects rather than actual market sales. In order to recover significant export volumes, it is to be hoped that the Swiss and Russian authorities will quickly find a solution.

The United States set a new export record in 2018 and now accounts for more than 12% of total Gruyère AOP sales. Important work is being done to support these sales. For example, this involves a presence in educational programs for salespeople. Good collaborations also exist with various other players in this market such as Switzerland Tourism. The Interprofession du Gruyère has been present for several years at the Fancy Food Show, a professional fair, which is held in January in San Francisco and June in New York. Canada also represents a high-potential market for Gruyère AOP. This is why promotional projects are being carried out in this country.

Comparison of Gruyère AOP yearly exports in tonnes



Total 2001:	9'775	(EU 6'608)
Total 2002:	9'303	(EU 6'064)
Total 2003:	9'407	(EU 5'948)
Total 2004:	10'280	(EU 6'147)
Total 2005:	10'600	(EU 6'794)
Total 2006:	11'186	(EU 6'719)
Total 2007:	10'886	(EU 6'917)
Total 2008:	11'779	(EU 7'205)
Total 2009:	10'974	(EU 7'346)
Total 2010:	11'967	(EU 7'501)
Total 2011:	11'670	(EU 6'673)
Total 2012:	11'527	(EU 7'568)
Total 2013:	12'207	(EU 7'757)
Total 2014:	12'376	(EU 8'063)
Total 2015:	11'956	(EU 7'307)
Total 2016:	12'106	(EU 7'551)
Total 2017:	11'787	(EU 7'480)
Total 2018:	12'800	(EU 7'689)

Under the sales promotion enforcement provisions of the Agriculture Act, the system in these countries will change in 2019 with the expiry of the 5-year deadline for the export initiative. In the future, more active coordination will have to be put in place for promotion in the United States, Sweden, Finland, Japan, China and Russia. A solution based on an antenna system for Northern European countries (Scandinavia and Finland) seems to be also emerging for the United States. For other countries, specific solutions involving the main market players will have to be found. Unfortunately, as far as Gruyère AOP and cheeses in general are concerned, China is not meeting the hopes placed on it a few years ago. Here too, it will be necessary to redefine the advertising strategies to be put in place.

Le Gruyère AOP carries out work at a more local level with an international scope in collaboration with the other Vaud AOPs: Vacherin Mont d'Or AOP and Etivaz AOP, as well as the Terravin wine label. In view of the significant presence of hotel schools based in the canton of Vaud, they are invited to discover these different products and their potential for use. This long-term activity will bear fruit in a few years' time. Students who

have attended these schools will assume responsibilities in hotels or restaurants around the world and will promote these high-quality products.

Le Gruyère AOP was also associated with the 125th anniversary celebration of the Ecole hôtelière de Lausanne for both events in several regions of the globe and during the gala dinner held in Paris in the spring and in Lausanne in autumn. In the same vein, in the canton of Vaud, is the 'Pintes Ouvertes' event initiated by Gastro Vaud. This



offers 100% Gruyère AOP fondues for the pleasure of customers at various partner restaurants in the region. It will be repeated in 2019.

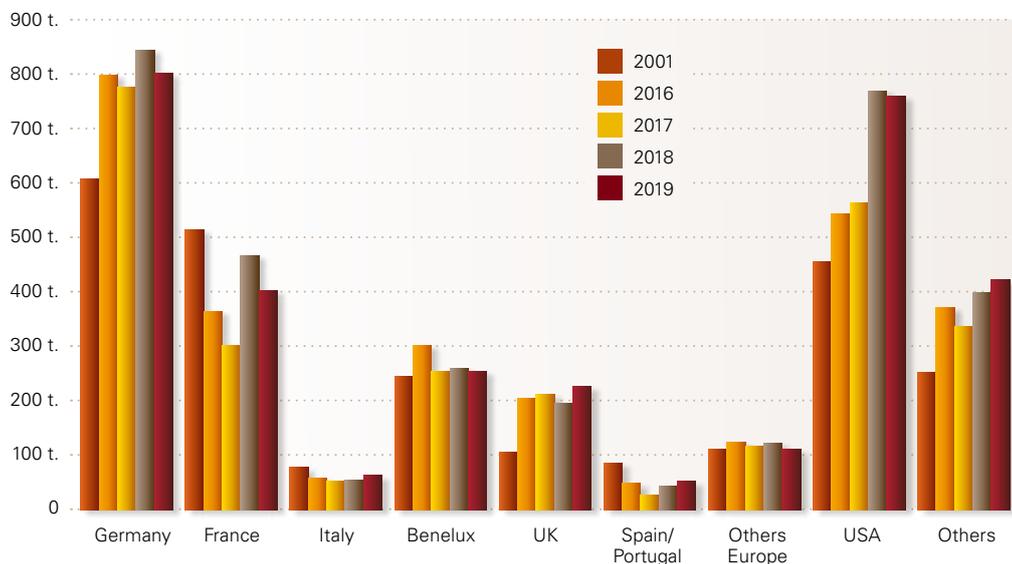
One of Gruyère AOP's flagship windows to the world is, of course, the Maison du Gruyère, which is not only the headquarters of the Interprofession du Gruyère but also the site of an exhibition demonstrating how Gruyère AOP is made which welcomed more than 650,000 visitors in 2018. The Interprofession is actively monitoring its renovation and a new Maison du Gruyère should be on the horizon for 2022-2025.

All these activities are supported by the website www.gruyere.com that is translated into 9 different languages. All the cheese dairies producing Gruyère AOP are presented here. One of its main features is the availability of recipes that promote Gruyère AOP in all its forms: hot, cold or as an aperitif. A presence in new media is also ensured via Instagram, Facebook and Pinterest. This social media work will be further strengthened in the future.

We aim thereby to consolidate the reputation of the Gruyère AOP Switzerland brand. The Gruyère association also intends to pursue promotional activities supported by federal funds. It is hoped that the conditions attached make it possible to advertise attractively without excessive administrative charges being associated with the amount allocated. In this way, it is important to defend the place of Swiss cheese both nationally and throughout the rest of the world.



Comparison of Gruyère AOP exports from January to March in tonnes



Total 2001:	2'461	(EU 1'752)
Total 2002:	2'421	(EU 1'563)
Total 2003:	2'401	(EU 1'524)
Total 2004:	2'588	(EU 1'492)
Total 2005:	2'409	(EU 1'693)
Total 2006:	2'602	(EU 1'734)
Total 2007:	2'497	(EU 1'742)
Total 2008:	3'024	(EU 1'816)
Total 2009:	2'367	(EU 1'813)
Total 2010:	3'066	(EU 1'906)
Total 2011:	2'814	(EU 1'849)
Total 2012:	2'796	(EU 1'881)
Total 2013:	3'293	(EU 2'020)
Total 2014:	2'979	(EU 1'915)
Total 2015:	3'170	(EU 1'998)
Total 2016:	2'820	(EU 1'906)
Total 2017:	2'645	(EU 1'745)
Total 2018:	3'163	(EU 1'994)
Total 2019:	3'097	(EU 1'916)



Le Gruyère AOP around the world







2018 Events

January to March 2018

Giant Xtour

10th to 13th January 2018

Swiss Expo, Lausanne

20th to 23rd January 2018

Winter Fancy Food Show and Cheesemonger Invitational, San Francisco

24th February to 4th March 2018

Paris International Agricultural Show (SIA)

10th and 11th March 2018

AOC, AOP and IGP Market, Bourg-en-Bresse, France

23rd March to 2nd April 2018

Foire de Lyon

10th to 14th April 2018

Zermatt Unplugged

17th to 21st April 2018

Patrouille des Glaciers, between Zermatt and Verbier

20th to 29th April 2018

Muba, Basel

Between April and September 2018

Regional finals of Mille Gruyère

27th April to 6th May 2018

LUGA, Lucerne

4th to 13th May 2018

BEA, Berne

11th to 13th May 2018

Swiss Organic Agricultural Fair, Moudon

19th and 20th May 2018

Open Wine Cellars event in the canton of Vaud

30th June to 2nd July 2018

Summer Fancy Food Show and Cheesemonger Invitational, New York

5th July 2018

Athletissima, Lausanne

15th July 2018

Slow Up, La Gruyère

17th to 22nd July 2018

Paléo Festival, Nyon

21st July 2018

30 years E-Bus Zermatt

4th to 11th August 2018

International Alpine Film Festival, Diablerets

6th to 12th August 2018

European Athletics Championships, Berlin

15th to 26th August 2018

Wheat and bread festival, Echallens

28th to 30th August 2018

Weltklasse, Zürich

14th and 15th September 2018

Open Bike, Haute-Gruyère

15th September 2018

Tchiiz Festival, Gruyère

20th to 24th September 2018

Salone del gusto, Turin, Italy

28th to 30th September 2018

Swiss Cheese Award, Lucerne

28th September to 7th October 2018

Züspa, Zurich

28th September to 7th October 2018

Foire du Valais, Martigny

11th to 21st October 2018

OLMA, Saint-Gallen

21st to 25th October 2018

Salon International de l'alimentation (SIAL), Paris



31st October to 4th November 2018

Salon des Goûts et Terroirs, Bulle

November 2018 to March 2019

Cross country skiing World Cup

2nd to 11th November 2018

Les Automnales, Geneva

2nd to 3rd November 2018

World Cheese Awards, Bergen, Norway

9th to 10th November 2018

Vully Blues Festival, Praz

16th to 18th November 2018

Slow Food Market, Zurich

16th to 24th November 2018

Le Gruyère European Curling Championship, Tallinn, Estland

30th November and 1st December 2018

20 years of the Cooperative of Alpine Cheese Producers, Charmey

6th to 8th December 2018

Open Doors event in the canton of Vaud

December 2018 to March 2019

Kids Nordic Tour, French-speaking part of Switzerland

9th December 2018

European Cross country (running) Championships, Tilburg, Netherland

Throughout the winter season

Fribourg Gottéron

Year-round

Poster campaign on the buses in Zermatt
Swiss cheese on all SWISS International airlines business flights departing from Switzerland



Governing bodies within the Interprofession du Gruyère

The Interprofession du Gruyère continued its various organisational and administrative tasks in 2018 under the presidency of Mr. Oswald Kessler.

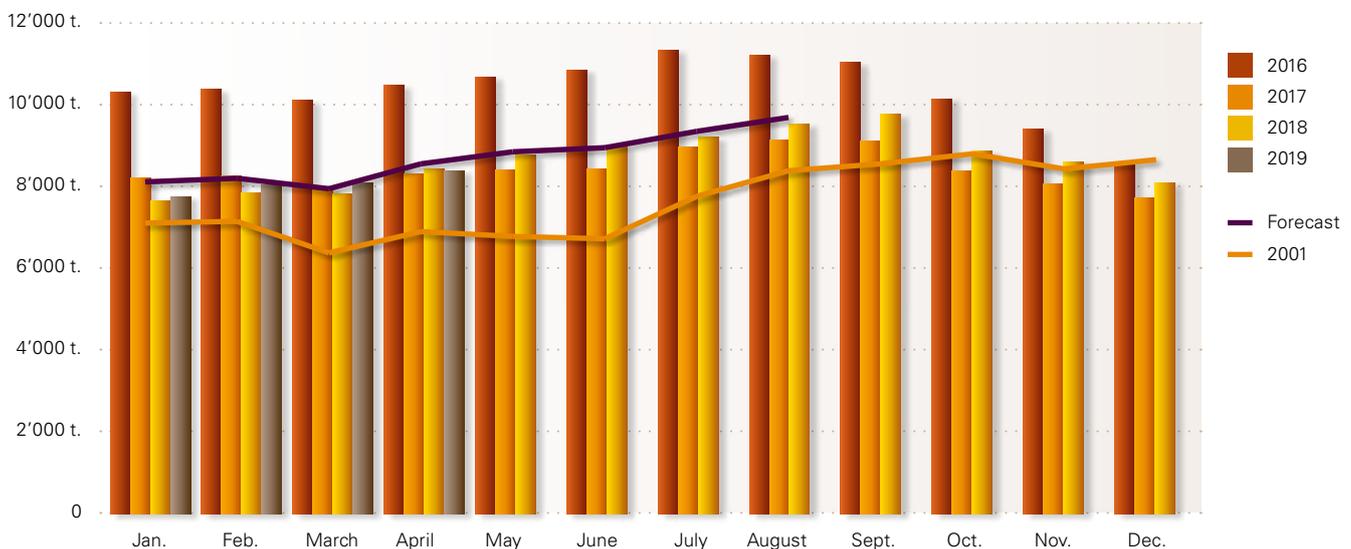
The Board of Direction met on 6 occasions to plan the Committee's activities and define staff policies.

The Committee met for 12 sessions including 2 seminar days organised in Rasses close to Ste-Croix. Here, the working guidelines for the Interprofession du Gruyère were reaffirmed. Its vision focuses upon strict quantity management and unwavering traceability whilst maintaining final product and milk prices. Beyond this, the

'Gruyère AOP Switzerland' brand should be the spearhead of all activities. The Committee focused on market development and supported the full implementation of the Specifications. Based on the tools available, the bodies of the Interprofession were able to keep quantities at 100% of the basic quota allocated. The Committee's work was based on the document entitled 'Cockpit'. It aimed to offer a better understanding the evolution of the market in relation to production and stock evolution. The indicators found through this enable effective management in the short and medium term.

The Assembly of Delegates held 2 sessions. One was carried out in Cernier for accounting and the annual report

Comparison of stock evolution (end of April 2019) in tonnes





and the other for voting on the budget and defining production quantities for 2019. The decision taken in autumn 2018 was to plan for 100% production on a new base volume of 101% for all cheese dairies. The first step is to insure these quantities for the first 3 months of the year and to confirm them in March 2019. This was accomplished as planned. Indeed, the evolution of sales is encouraging and stocks are at a relatively low level.

The Alpage Commission, which aims to deal specifically with Gruyère d'Alpage AOP, met 3 times. A good situation on the markets has made it possible to offer mountain pastures, with sufficient potential and adequate quality, the possibility of producing 3% more in 2018 than the basic quota allocated. The opening of new mountain pastures was also discussed. These options will be implemented in 2019 for the 2020 - 2021 alpine seasons. This speciality must be pressed with a cloth while having a manual cutting of the curds during the manufacturing process.

The Bio Commission met 4 times to tackle the evolution of the quality and, in particular, the quantity of organic production within the Gruyère AOP association. Quality, and indeed the entire production process, is not of particular concern. On the other hand, there was a marked positive trend in sales, which resulted in very low inventories at the end of the year. Proposals were made to the Committee to conduct a special promotion for Gruyère AOP Bio. These proposals were not accepted but will be integrated into the overall promotion of Gruyère AOP in the future. It is encouraging to note that both in Switzerland and on some international markets such as France; the organic segment of Gruyère AOP production is experiencing very positive developments.

The Marketing Commission held 3 meetings. This Commission was concerned with promotional work, above all on the various international markets to support the Gruyère AOP sales. The role of this Commission will have to be redefined in the near future.

The Planning Committee met 6 times. The main issues they confronted concerned compliance with quantities in the 3/9 system, the planning of new cheese dairies and

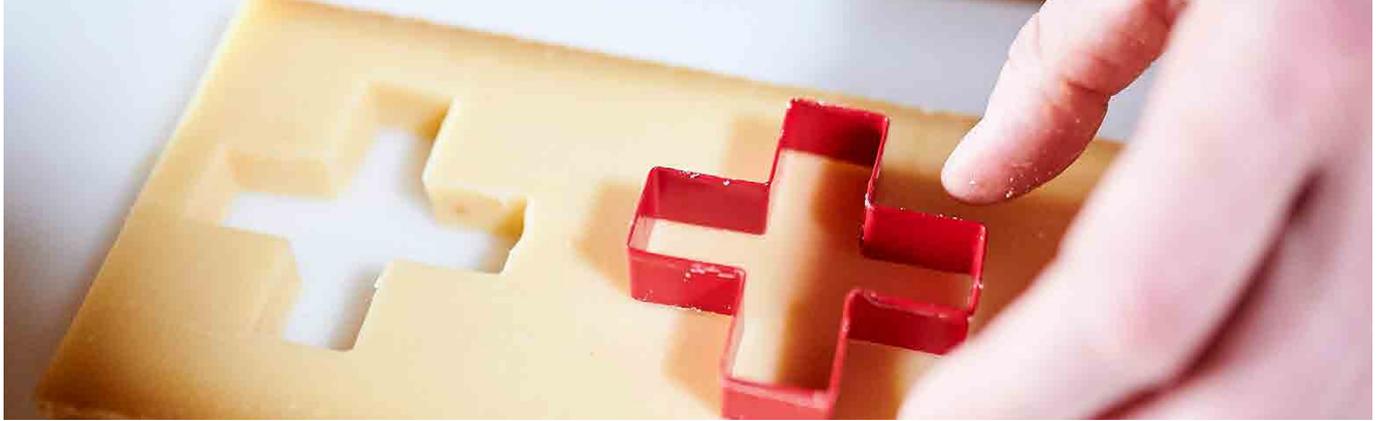
the related Gruyère AOP quantities. It is critical that the decisions of the Planning Commission are in-line with the application of the Specifications. Decisions taken by this Commission may be appealed to the corresponding Commission at the quantity management level. The latter met once and rejected the appeals lodged.

The Quality Commission held 2 meetings. Its work concerned the evolution of the quality of Gruyère AOP, which is very good overall. In this context, it must be ensured that production techniques maintain the artisanal character of the product whilst always guaranteeing the inimitable taste of Gruyère AOP. In the event of particular problems encountered in one or other of the cheese dairies, an ad hoc Commission is appointed to assist and propose solutions to the establishments concerned. A Commission of this type met three times to find appropriate solutions in the cases concerned. Another ad hoc commission to monitor developments on dairy farms met to see different solutions allowing some form of feed automation.

It should be noted that the quality sector is still monitoring the research being carried out into the identification of original cultures and surface marking to improve and strengthen the overall identification of Gruyère AOP on the market. It is hoped that tangible results can be presented in the course of 2019 or at the latest in 2020.

Administration is headed by Mr. Philippe Bardet, Director, and Mr. Marc Gendre, Deputy Director. The latter manages the quality sector, whose work is divided between Thierry Bize and Christophe Magne. This sector collaborates with the various quality promotion support bodies Caséi and Arqha as well as Agroscope.

The marketing department, under the coordination of the Director, had a transitional year in 2018. Despite all tasks being carried out successfully, it was necessary to make up for the departure of Ms. Laure Rousseau. Following on from the happy event of the birth of the daughter of Ms. Marie L'Homme, her tasks had to be temporarily reassigned. The department was able to count on the presence of Mr. Philippe Gremaud as well as Ms. Catherine Merian who had already worked for the Interprofession



about ten years ago. In order to be able to take on the various tasks as efficiently as possible, the sector was strengthened at the end of the year by the employment of Ms. Anaïs Grandjean, who is in charge of various issues and also the new media, nowadays key to reaching new consumers. In addition, a person has been recruited to handle international markets. A successful search led to the engagement of Mr. Denis Kaser on February 1, 2019. For this new year, the marketing department therefore comprises Ms. Marie L'Homme, Ms. Anaïs Grandjean, Ms. Catherine Merian, Mr. Philippe Gremaud and Mr. Denis Kaser.

As far as the management of the Interprofession's promotional material is concerned, the association continues to rely on Mr. Meinrad Gaillard.

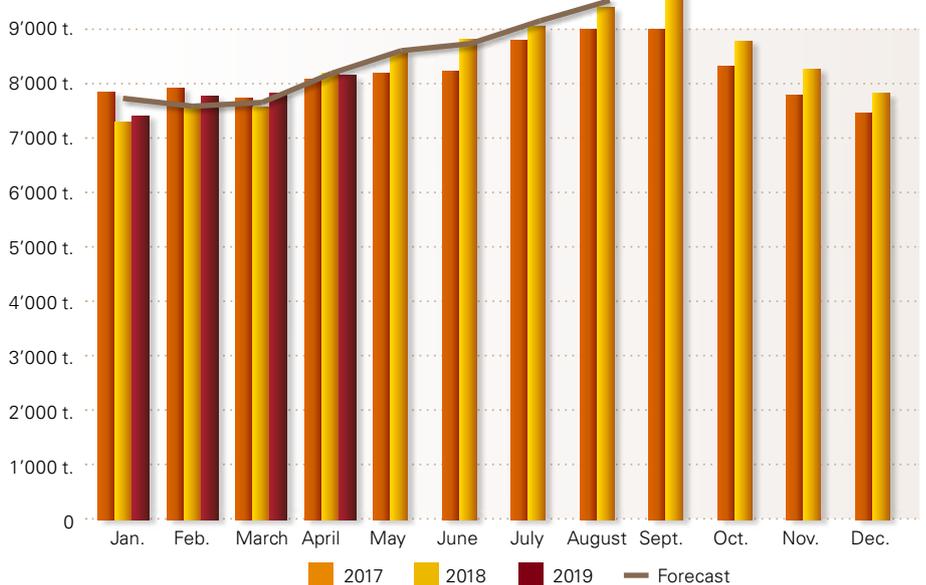
Ms. Christine Grandjean and Ms. Julie Sudan, who we congratulate following the birth of her son, provide secretarial support.

Ms. Magali Vuichard and Ms. Sandy Uldry keep the accounts.

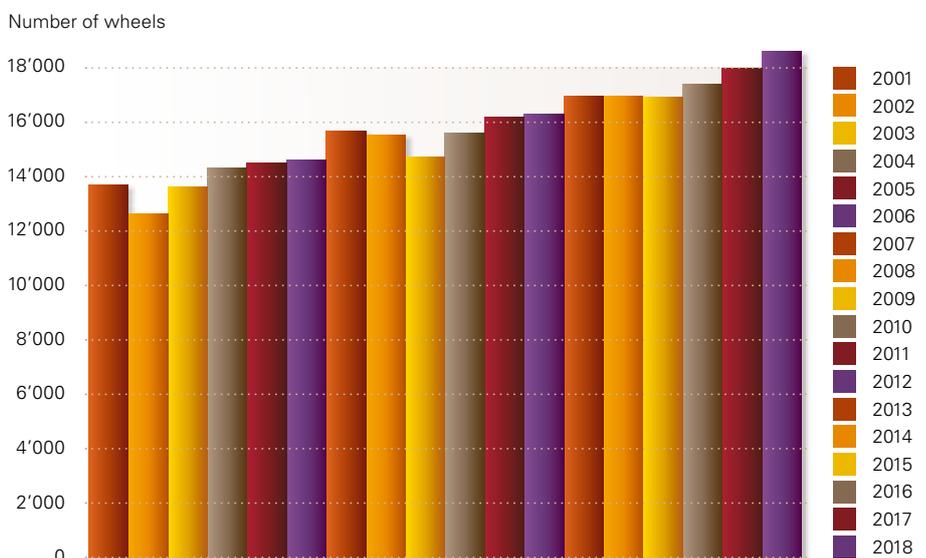
This motivated and partly renewed team will enthusiastically continue its work to promote and defend Gruyère AOP in 2019.



Comparison of stock evolution excluding Alpage (end of April 2019) in tonnes



Comparison of Alpage production (casein markings)





Committee members as of December 31, 2018

Committee of the Interprofession du Gruyère

President	Oswald Kessler*	Yverdon-les-Bains
Producers	Romane Botteron Didier Roch* Nicolas Savary Pascal Surchat	La Sagne Ballens Sâles (Gruyère) Blessens
Cheese makers	Nicolas Schmoutz Adrian Scheidegger Didier Germain** René Pernet	Mézières FR Niedermuhren Les Ponts-de-Martel Peney-le-Jorat
Affineurs	Jean-Marc Collomb Gilles Margot* Jean-Charles Michaud Ralph Perroud	Fromco SA, Moudon Margot Fromages SA, Yverdon Mifroma SA, Ursy Fromage Gruyère SA, Bulle
Guests	Jean-Pierre Huguenin Olivier Isler Daniel Koller Roland Sahli ¹	Avocat, Boudry Fromarte, Berne PSL, Berne Gourmino AG, Lenzburg

Vice-president

* Member of the board of direction

¹ Affineur coordinator



Outlook for 2019

In 2019, the bodies of the Interprofession will be committed to improving the functioning of the association based on the following precepts:

Quantity

- Set up a management and planning tool in a spirit of transparency and trust, with the objective of qualitative growth, by defining an alert threshold. -> *A cockpit for inventory, production and sales management is being applied. Alert thresholds are continuously monitored to ensure that they best meet market demand.*
- Strengthen measures and decisions to ensure compliance with rules and the fight against imitations. -> *The IPG actively supports the Savary motion to introduce vigilance officers.*

Quality

- Set up a quality observation system (intrinsic and global) right down to the points of sale, taking into account consumer expectations (panel). -> *A mandate was given to the Zollikofen Engineering School (HAFL), which was complemented by a study on the younger generation.*
- Set up a monitoring system to chart the evolution of production and installation techniques in relation to the quality of Gruyère AOP. -> *A collaboration has been initiated with Agroscope, Arqha and Casei.*

Profitability

- Ensure the profitability of the association, its stakeholders and administration.
- Analyse the implementation of a legally recognised internal commercial coordination structure.

Clients

- Analyse and define the image, history, strengths and characteristics of Gruyère AOP. -> *The Gruyère AOP milk producers group will present the result of the mandate given to an external consultant to define the evolution of farms in terms of sustainability.*
- Analyse and define the aspects to be transmitted to clients and consumers.

Brand and Marketing

- Establish a clear brand and marketing strategy by objectively analysing the current situation. -> *A strategy based on the Guide to Good Practice and the Specifications will be defined with market players.*
- The IPG's marketing structure has been strengthened by redefining the objectives, tasks and responsibilities of those involved.
- Develop a communication concept and a new advertising strategy for Switzerland.

The future of the IPG

- Put in place a risk analysis system for the IPG (Risk management).
- Promote and further the identification of members to the sector to which they belong. -> *Each member of the association showcases the 'Le Gruyère AOP Switzerland' brand. A survey will be conducted to strengthen collaboration within the sector and overall support for the promotion of Gruyère AOP Switzerland.*

The Interprofession intends to fulfil its tasks so that Gruyère AOP develops in the interest of the consumer while ensuring a healthy distribution of the economic appreciation to all those involved in the daily production of this noble cheese.

Recapitulation of the distribution of the total production potential for Gruyère AOP per cheese dairy and per canton for 2019

Canton	Villages			Bio			Villages + Bio			Alpages			All		
	Quantities (Kg)	(%)	Nbr	Quantities (Kg)	(%)	Nbr	Quantities (Kg)	(%)	Quantities (Kg)	(%)	Nbr	Quantities (Kg)	(%)	Nbr	
FR	15'091'095	51.53	84	344'666	30.31	4	15'435'761	50.74	192'227	34.39	31	15'627'988	50.45	115	
VD	8'317'461	28.40	39	320'520	28.18	3*	8'637'981	28.40	344'915	61.70	21	8'982'896	29.00	61	
NE	2'873'798	9.81	15	99'500	8.75	1	2'973'298	9.77				2'973'298	9.60	15	
JU	703'564	2.40	3	153'537	13.50	1	857'101	2.82				857'101	2.77	3	
JUBE + al.	870'607	2.97	5	98'614	8.67	1	969'221	3.19	21'839	3.91	3	991'060	3.20	8	
BE	952'042	3.25	8	120'414	10.59	1	1'072'456	3.53				1'072'456	3.46	8	
Other cantons	474'885	1.62	6				474'885	1.56				474'885	1.53	6	
Total	29'283'452	100.00	160	1'137'251	100.00	11*	30'420'703	100.00	558'981	100.00	55	30'979'684	100.00	216	

* Cheese dairies producing Bio: 10 cheese dairies producing both Traditional and Bio Gruyère AOP plus 1 dairy producing only Bio.



LE GRUYÈRE®

SWITZERLAND



Interprofession du Gruyère
Place de la Gare / P.O. Box 12, CH - 1663 Pringy-Gruyères
interprofession@gruyere.com - www.gruyere.com



Switzerland. Naturally.



Cheeses from Switzerland.
www.cheesesfromswitzerland.com

