

LE GRUYÈRE®
SWITZERLAND 

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l'oiseau



Annual report 2019 of the Interprofession du Gruyère



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Martial Rod and Didier Bovet, gold medal-winning at the awards presentation of *Interprofession du Gruyère*
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Message from the President

As you can read in this edition of L'Oiseau, we successfully completed 2019.

At the end of the year we have an opportunity to look back at the previous 12 months.

Based on the year's facts and figures we can, and have, to take stock and continuously ask ourselves:

- What can we do better?
- What needs to change?
- What is the competition doing?
- Are we correctly market- and consumer-oriented?

While I'm writing this I have time, lots of time, because I'm confined to my home like many of my generation. Time to read and time to think.

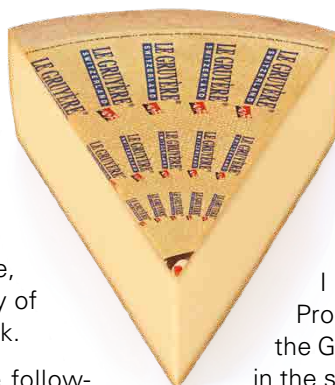
I am also taking the time to reflect on the following questions after nine years as president of the Interprofession du Gruyère.

- Is my message understood?
- Is my vision of the future sustainable?
- Is my market-consumer orientation right?
- How do the other Interprofessions work?
- Is my style of leadership accepted?

In my first message of 2012 I wrote: The best way to arm yourself against unpleasant surprises, is to always be prepared for surprises.

No one was ready for the unpleasant surprise that was Covid-19 and the way it would affect the world economy.

We do not yet know the consequences for supply chains and export markets.



History teaches us that our Switzerland and our Gruyère AOP have survived many dramatic times since 1115.

Fear is a bad counsellor!

I am reassured, because our Gruyère AOP is:

- A unique product
- A strong brand
- Very strong in the domestic market
- Well established in export markets
- We are an independent and functional organization

This crisis will make us stronger, provided we stay united.

I expect each of our 2250 members, Milk Producers, Cheesemakers and Affineurs, to pull the Gruyère AOP rope with conviction. Obviously all in the same direction!

At his last Assembly of Delegates on the 6th June 2011, my predecessor and Honorary President Pierre Dubois ended his farewell speech saying:

"In closing I would like to use a historic speech that I borrowed from an American president, John Fitzgerald Kennedy, who exclaimed in West Berlin 'Ich bin ein Berliner' and I proclaim 'I am Le Gruyère AOC.' "

Let's take Pierre Dubois as our example.

'I am Le Gruyère AOP Switzerland.'

Oswald Kessler
President of the
Interprofession



General situation

At the time of writing this 2019 annual report, it is difficult to ignore the situation that prevailed at the end of March with the Covid-19 pandemic. Although sales prospects both in Switzerland and abroad were looking promising, within a month the virus had put a brake on the global economy. It is necessary and also characteristic of an annual report, however, that it looks back over the past year with a view to the maxim that is so acutely relevant today: "nothing can be taken for granted".

In that respect, by looking back to the beginning of 2019, a period that seems very far away in view of current concerns, the Interprofession's bodies followed the principles of the evolution of quantities based on the opening of new cheese dairies and supplements granted to the association.

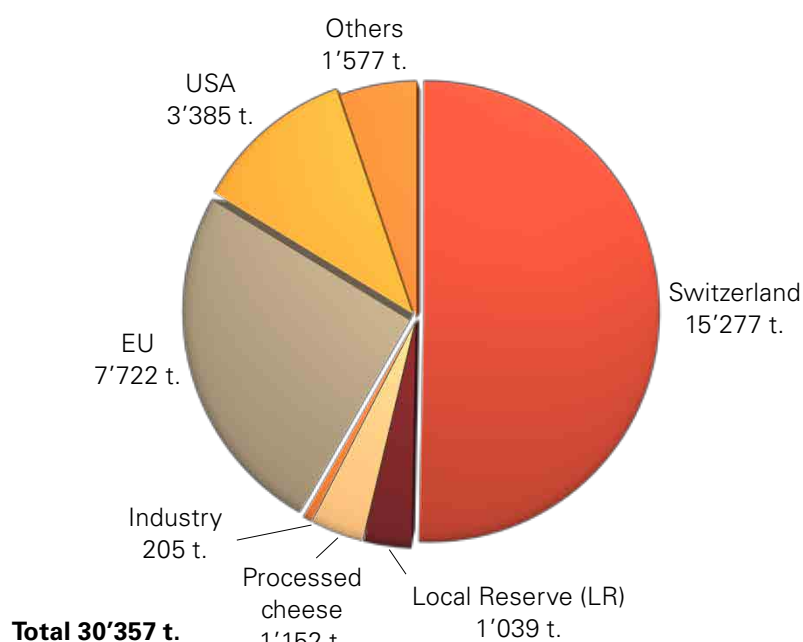
The basic quantity for each cheese dairy was increased by 1% in a linear fashion. In addition, the old waiting list was closed definitively by allocating the equivalent of 5,000 kg of Gruyère AOP milk per application. In the end, the new cheese dairy in Ropraz received the quantity allocated to the Vulliens dairy company. As a result, just over 31,000 tonnes of Gruyère AOP and Gruyère d'Alpage AOP were put into production in 2019.

This steadily increasing volume demonstrates the consumer's interest in this noble cheese. Moreover, this increase has never been to the detriment of price, quite the contrary. The excellent consumption observed throughout the year has enabled us to keep stocks at a very low level. As a result, at the beginning of 2020 it was decided that overall prices should increase for the first time since 2013. This was in response to the increase in costs that each company has experienced over the last 6 years.

This favourable situation is due to sustained consumption both in Switzerland and abroad. Although there was a slight decrease in the overall sales figures outside the country, this was mainly due to a slight decline in the two main export countries, Germany and the USA. However, it is worth noting that the 2019 export figures are the second highest since Le Gruyère AOP began exporting.

Thanks to its good reputation and excellent quality that reflects the professionalism of the entire association, Le Gruyère AOP is one of the most popular cheeses. This is demonstrated by its consistent results in international competitions. The World Cheese Award at the beginning of 2020 saw the cheese of the Spycher family from Fritzenhaus win first place.

Repartition of the Gruyère AOP consumption during 2019 in tonnes





This overall excellence is due, amongst other things, to the quality incentive system, which culminates in the systematic monthly grading of all cheese dairies that has been carried out since the AOP was recognised. This system, initiated by the Swiss Cheese Trading Union (USF), was a step in the right direction. Thanks to this approach, it was possible to honour the best results over the past 5 years during a beautiful evening in October at the Grangeneuve Training Centre. The overall average scores for this five-year event are on the rise. The best result in cheese making was obtained by the Corcelles-le-Jorat site under the responsibility of Mr. Bovet with an average of 19.87. This brilliant artisan's work can also be linked to the first mountain pasture, the Moësetta, operated by Mr. Rod, and also the entire association whose diversity makes it so rich. Indeed, the various national and international panels, whether they are made up of professionals or average consumers, recognise the excellent standard of Gruyère AOP. As such, it is a great honour to see that this cheese is recognised as an official dish in the main cantons of the Gruyère AOP area: Fribourg, Vaud and Neuchâtel.

When a product is of such a high quality as this, it is inevitable that this will have an impact on its notoriety. This makes it possible to build a marketing and promotion system capable of driving consumption in a positive direction. Le Gruyère AOP has been present at numerous events

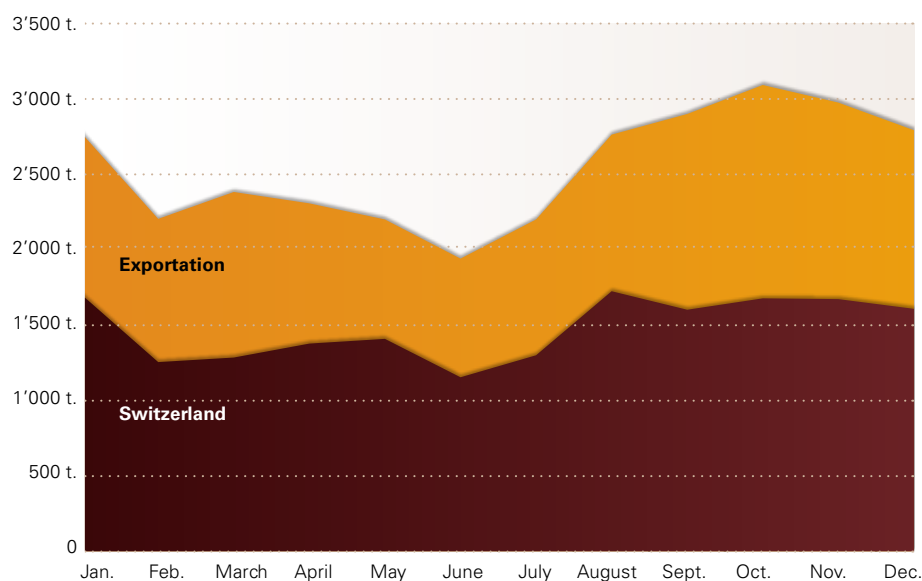
and visible on many occasions. Details of this commitment can be found in the specific chapter on marketing. However, it is worth noting its presence around athletics stadiums, for example at Athletissima or Weltklasse, along the tracks of the cross-country skiing World Cup both in Switzerland and abroad or at Le Gruyère AOP European Curling Championship. In 2019, the icing on the cake was participation in and around the Fête des Vignerons in Vevey over the summer.

The events of early 2020 show that positive pages can turn quickly. On the other hand, these achievements, based on a long tradition, are certainly also a token of belief in the future. Yet it is also clear that more difficult times can provoke certain reflections. It is with this in mind that the association launched a study on its functioning in autumn 2019. 20 years after the Interprofession's creation and entry into full activity, it was time to note the strengths and issues of the work being carried out. It was actually on May 1, 1999, the date of the end of the USF, that the IPG took up its duties at a time when everyone thought it was a leap into the unknown and perhaps even a great plunge into the void. Two decades later, quantities have increased thanks to the volume sold abroad and the maintenance of market shares in Switzerland. In addition, the price of cheese is at a level that makes it possible to pay one of the highest milk prices in Switzerland or even in the world each month, while at

the same time allowing all the different branches of the association to earn a decent income. More pleasing still is the fact that investment continues to be plentiful with cellars being renewed, construction and renovations taking place in cheese dairies and new farms being established throughout the countryside.

But being satisfied with this result is no guarantee for the future. Every effort must be made to ensure that the successors at the head of this institution can write similar words in 2039.

Monthly sales 2019 in tonnes





Quantity management

The strict method of quantity management in place has been based on the 3/9 system since 2015. This system is constantly analysed to see whether any modifications need to be made. At the same time, a more detailed management and alert system for market observation has been introduced. This cockpit provides a real-time view of the evolution of stocks, production, actual sales and, above all, the medium-term market outlook. Based on this, it is possible to make a more precise assessment of the quantities to be produced.

The markets for traditional Gruyère AOP, Gruyère AOP Bio and Gruyère d'Alpage AOP are treated separately whilst still having an overall view of production.

The volume allocated in 2019 was increased by 1% for traditional Gruyère AOP and Gruyère AOP Bio in accordance with the schedule made several years ago. All cheese dairies have had their basic quota amended to a volume corresponding to 101% of the previous quantity.

Last year, for example, around 30,500 tonnes were put into production, including some 97 tonnes of a reduced quality. Of this volume, 30,200 tonnes, or 99%, were actually produced. As previously announced, a new cheese dairy has been allocated a new quantity of Gruyère AOP with reference to the policy decided in 2012.

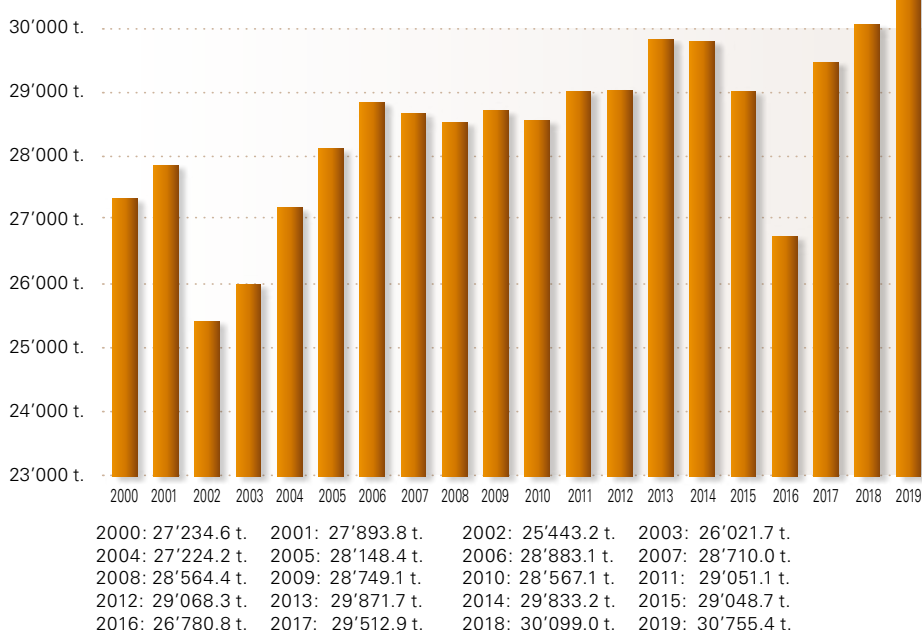
For Le Gruyère d'Alpage AOP, the 3% granted temporarily in 2019 was awarded on the basis of quality conditions and the cheese potential of the alpine pasture. These were granted definitively to the various sites concerned. As a result, 562 tonnes were put into production for a total effective production volume of 533 tonnes. The difference is mainly due to the vagaries of nature and climate, which did not allow the full potential to be produced.

Healthy stock levels and strict adherence to individual quantities mean that the same overall quantities can be expected in 2020.

Le Gruyère AOP Bio, on the other hand, is the subject of a more in-depth analysis. Indeed, throughout 2019, there was a shortage of cheese in this market segment. A study was carried out at the various sites to see whether there was potential for growth with existing producers or with new producers and whether there was potential in the traditional Gruyère AOP cheese dairies to commission an organic vat. On the basis of this reflection, it was decided at the end of 2019 to allocate some 170 additional tonnes for the year 2020 with a new vat in an existing cheese dairy at Les Sagnettes. In addition, for 2022, a new organic production site will be opened in Châtel-St-Denis. As a result, the quantity of Gruyère AOP Bio should increase from 1,143 tonnes to 1,300 tonnes by 2020.

In the context of the reflections on both Gruyère AOP Bio and traditional Gruyère AOP, the bodies of the Interprofession are aware that a broader study needs to be carried out for future years, starting in 2022. This would aim to provide a relatively precise picture of the potential for the development of quantities in the different regions and in the different production and development segments of Gruyère AOP.

Total production 2000-2019 in tonnes





Market evolution

As previously mentioned, consumption of Gruyère AOP reached a record in 2019, following on from that of 2018, with some 30 357 tonnes sold. This figure is encouraging both in Switzerland and abroad, despite the fact that, outside our country, 2019 sales figures were slightly lower than in the previous year. It is pleasing to note that consumption remained buoyant throughout the year.

Of the total volume, more than 16,300 tonnes are stored in the various shops in Switzerland, as much in the super-markets as in the more specialised shops. Le Gruyère AOP remains the leading Swiss cheese sold in Switzerland despite a constant increase in imports and competition from similar cheeses made in other parts of the country. Although Le Gruyère AOP is very well known, there is a need to maintain significant marketing investment in Switzerland to ensure that current and future consumers remain loyal to the product.

As mentioned in the quality management section, the volumes of Gruyère AOP Bio sold have been increasing and it has been difficult to truly meet this demand in 2019. For this reason, significant increases in this segment have been granted for 2020.

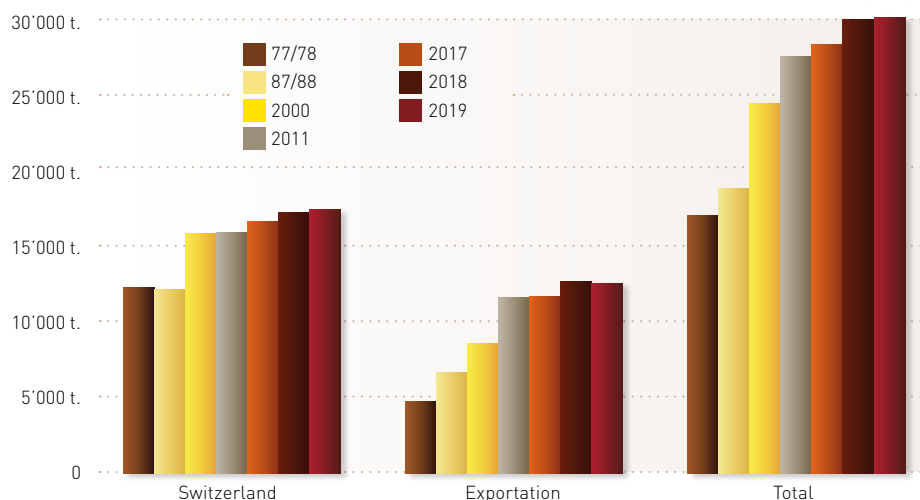
Foreign markets have shown a slight decline since 2018, although the level remains high. The United States remains the number one performer with 3,385 tonnes. Germany comes just behind with 3,160 tonnes. Other countries such

as France, the Benelux countries and the UK are enjoying pleasing figures, despite a number of uncertainties in their own markets. Now that Brexit has been definitively decided, it will be necessary to analyse how volumes will develop in Great Britain. It is reassuring to note that Switzerland has already concluded agreements with this country to allow goods to continue to circulate there. Le Gruyère AOP is continuing to sell well in new countries such as Scandinavia in the broadest sense and more particularly in Sweden, where the Interprofession has decided to invest larger marketing sums linked, among other things, to the sponsorship of cross-country skiing, curling and athletics.

Le Gruyère AOP must maintain a strong presence in different countries around the world. At present, it is sold in 55 countries, which makes it possible to compensate for a certain decline in one country or another by a positive development in other regions. In order to continue the positioning of Gruyère AOP, it is important that the brand and the name 'Gruyère' are defended on all continents. This is one of the most important tasks of the Interprofession, which is supported in this by the Confederation. It is also crucial that all marketing activities as well as any labelling on the sales front clearly display *Le Gruyère AOP Switzerland* brand. Many thanks are due to the various parties involved in sales who make good use of this brand in the interests of the entire association.

Care must also be taken to ensure that the various hygiene standards or restrictions on transport do not hamper the sale of Gruyère AOP. The Interprofession is counting on the support of the relevant cantonal and national bodies to facilitate the export of cheese to the various regions of Europe and the world. This is vital for the healthy development of the market for Le Gruyère AOP. It is thanks to this coordinated work that the association will be able to continue to grow.

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, even primordial task for the association. At all times, consumers must know what they are buying under the Gruyère name. At this level, it is a question of respecting the work carried out daily by producers, cheese makers and affineurs who comply with the guidelines laid out by the Specifications and checked by the Intercantonal Certification Body (OIC). This document, approved in 2001, clearly defines the traceability system that makes it possible to identify each cheese wheel produced. This means that we know not only precisely which cheese factory is producing the cheese, but also which producer has delivered the milk for its production, which is an important asset for the whole association. The Interprofession would like to thank each person involved in this product identification process.

In order to strengthen consumer confidence, it is also essential that public controls confirm this important work. The Interprofession is calling for stronger coordination between the cantonal and federal inspection bodies, the certification bodies and the various staff members of the Interprofession. In this respect, it welcomes the acceptance by both chambers of the motion proposed by Géraldine Savary, member of the Council of States and President of the AOP-IGP Association. This proposal makes it possible to introduce vigilance agents in the form of staff sworn and paid by the Interprofessions who are able to intervene in companies where fraud is suspected. For example, there are grounds for investigation if a company sells more Gruyère AOP than it buys. These agents are not in competition with the public control authorities, but will support them in the interests of the consumer and consumer health. The Interprofession as well as the various AOP and IGP associations are waiting for the Federal Council to quickly implement legislation so that these vigilance agents can exercise their control. This is how Article 182 of the Agriculture Act will finally be implemented for the first time.

Both nationally and internationally, the Interprofession du Gruyère does everything possible to protect the Gruyère

name in all parts of the world. On several issues, it acts in concert with its French counterpart for Gruyère IGP as well as with the French government body, the *Institut National pour les Appellations d'Origine* (INAO). This work is also carried out in coordination with the Federal Office of Agriculture and the National Institute for Intellectual Protection. It should be noted that the OFAG provides financial support for certain legal steps to defend or register a trademark.

On each occasion that a misleading use of the name Gruyère is observed, either on the market or at various exhibitions or fairs, legal action is taken to put a stop to it. To date, many of these efforts have been successful and it is reasonable to assume that the misuse of the Gruyère name is somewhat declining around the world, to the benefit of consumers at home and abroad.

In its work to defend the name, the *Interprofession du Gruyère* relies on the work of the international organisation OrigIn, which defends the protection of geographical indications throughout the world, as well as the Swiss Association for the Protection of AOP-IGP. Switzerland Cheese Marketing (SCM) also plays a significant role by reporting cases of misuse and also by enforcing licensing agreements. The *Interprofession du Gruyère* has approached the federal authorities in order to make them aware of the fact that, when bilateral agreements are concluded, the protection of geographical indications and more particularly the name Gruyère should be regulated in the best possible way. For this reason, the draft agreement currently under discussion with the Mercosur countries is unsatisfactory with regards to the form of protection that it offers for the Gruyère name. Once clarification on this point is achieved, the Interprofession will set out its requirements regarding the presence or otherwise of the name in the final agreement.

As with any company active on the international market, sales success can only be based on clear and unfailing protection of the name under which the product is sold, in this case Le Gruyère AOP. This is precisely the approach that was initiated in 1992 with the signing of the Gruyère charter.



The quality of Le 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 months mark when the cheese is removed from the dairy cellars. Grading itself is carried out by a 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/vendor.

This process guarantees the quality of Gruyère AOP and Gruyère d'Alpage AOP for the enjoyment of consumers from all walks of life. This aspect is promoted by the *Interprofession du Gruyère* through the payment of quality premiums which have amounted to around 5.6 million francs. Creating a quality product is also supported by an incentive which, while honorary, is also of great importance to everyone, including cheese dairies, cheesemakers and ripeners. This is the five-year competition which rewards the best ratings over this period. These excellent results were celebrated on October 2nd at the Grangeneuve training centre. The association

awarded the supreme title to the Corcelles-le-Jorat dairy through the intermediary of its cheesemaker, Didier Bovet, and the Gruyère d'Alpage AOP category was won by the Moësetta mountain pasture, run by Martial Rod. Details of this event can be found in *L'oiseau n°48*. Such high quality standards can be found across the entire production, as Le Gruyère AOP is regularly honoured in various competitions worldwide.

On looking more closely at the annual 2019 production levels, it can be seen that the IB rate remained very low. This suggests that the rule of encouraging quality without requiring a consensus is bearing fruit: 98% of cheese wheels were classified as IA quality, while the proportion of 19 and + was 64%. Out of 27 appeals in relation to assessment, 15 were accepted. For the production of Gruyère d'Alpage AOP, where climatic conditions play a more important role, quality is also affected with proportionally a little more IB, which is understandable for this speciality. However, 92.1% was classified as IA with 67.6% of 19 and +.

This excellence can be attributed to the professional work of everyone involved, from milk production to cheese processing and maturing. This daily commitment is also encouraged by the various advisory bodies, Caséi, Arqha and Agroscope. Training also needs to continue, so that future generations will always want to ensure the diversity of tastes in independent structures serving quality and tradition.

With a view to preserving the authenticity of national specialities, the *Interprofession du Gruyère* is actively participating in the setting up of Liebefeld Culture AG with the strategy of moving this structure as soon as possible to Posieux, Grangeneuve.



Chemical analysis

Moisture and fat content

Systematic testing of the chemical composition of the cheese is carried out on each batch put on the market. 16 analyses were appealed, of which 12 won.

It is worth noting 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

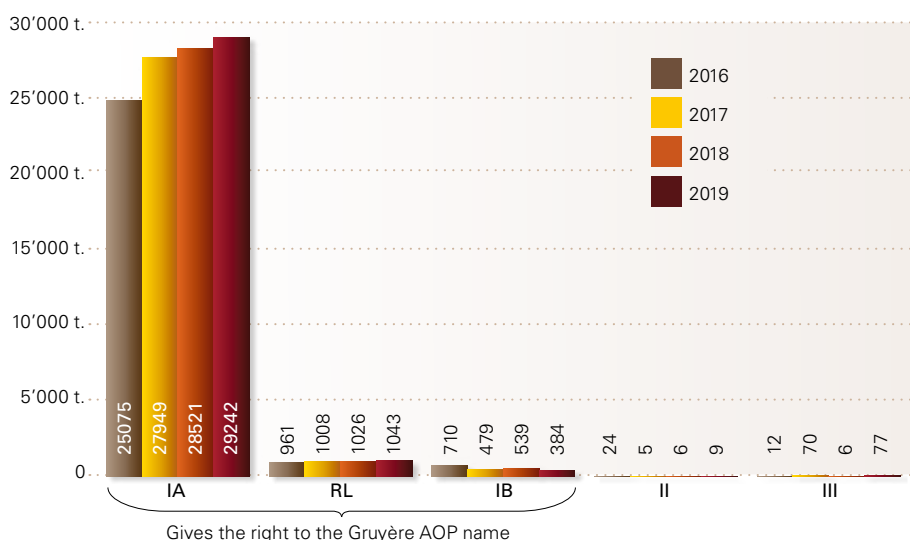
The Interprofession carries out analyses related to the hygienic and bacteriological quality of the cheese. In 2019, testing for the absence of pathogenic products continued. This confirmed that the measures that have been put in place ensure that Le Gruyère AOP sold complies with the relevant legal requirements. This is important in reassuring the consumer who buys Le Gruyère AOP that they are receiving a naturally lactose-free, gluten-free and additive-free product.

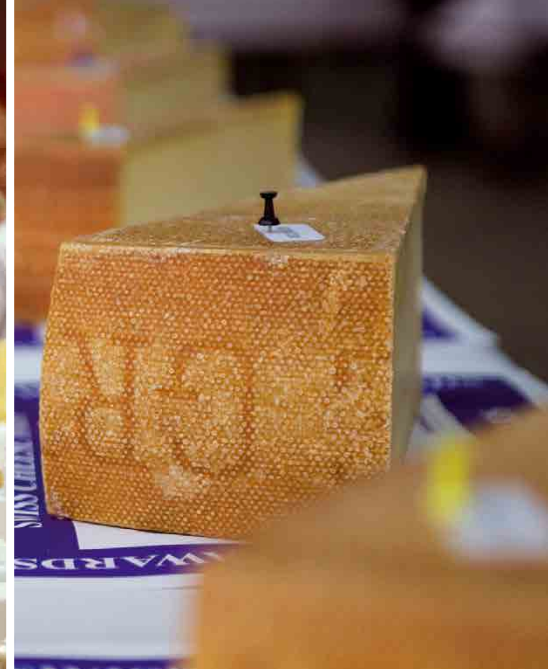
In this respect, the association would like to draw attention to the excellent spirit of collaboration that prevails with the various supervisory bodies, where each is responsible for its own sphere of competence.

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 made available to stakeholders within the association to help 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.

Mondial du Fromage et des Produits laitiers, Tours, France, 2nd June 2019

This professional trade fair brought together 200 exhibitors from 15 different nationalities from 2nd to 4th June 2019 in Tours, France.

Close to 950 cheeses and dairy products were presented in the event's product contests on Monday 2nd June 2019.

Super Gold medal

Fromagerie Moléson SA, with Le Gruyère AOP Vieux Suisse Moléson 18 months, refined by Fromages Gruyère SA, Bulle

Super Gold medal

Fromages Spielhofer, with Le Gruyère AOP 8 months, refined by Mifroma SA, Ursy

International Cheese Awards 2019, Nantwich, England, 30th and 31st July 2019

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

Category: Speciality Cheese – Hard Pressed – Gruyère AOP Gold

Vincent Tyrode, Dairy l'Auberson, matured by Margot Fromages SA, Yverdon-les-Bains

Bronze

Gilbert Golay, Dairy Penthéreaz, matured by Margot Fromages SA, Yverdon-les-Bains

Category: Speciality Cheese – Hard Pressed Cheese Silver

Philippe Geinoz, Dairy Les Sagnettes, matured by Margot Fromages SA, Yverdon-les-Bains

Category: Hard Cheese made with unpasteurised raw milk – Gruyère

Silver

Gilbert Golay, Dairy Penthéreaz, matured by Margot Fromages SA, Yverdon-les-Bains

Bronze

Vincent Tyrode, Dairy l'Auberson, matured by Margot Fromages SA, Yverdon-les-Bains



Category: Hard Cheese made with unpasteurised raw milk

Silver

Christophe Suchet, Dairy Bonnefontaine, matured by Lustenberger & Dürst SA, Cham

Category: Hard Pressed Cheese

Silver

Adrian Tinguely, Dairy Côte-aux-Fées, matured by Margot Fromages SA, Yverdon-les-Bains

Very Highly Commended (VHC)

Vincent Tyrode, Dairy l'Auberson, matured by Margot Fromages SA, Yverdon-les-Bains

Category: Best Swiss Cheese – Gruyère AOP

Gold

Christophe Suchet, Dairy Bonnefontaine, matured by Lustenberger & Dürst SA, Cham

Silver

Vincent Tyrode, Dairy l'Auberson, matured by Margot Fromages SA, Yverdon-les-Bains

Category: Best Retailer Unpasteurised any other Hard Cheese

Silver

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

Category: Best Retailer Swiss Gruyère AOP

Gold

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

Swiss local food competition, Delémont, 28th and 29th September 2019

During the Swiss local food competition which took place the weekend of the 28th of September 2019, several medals have been discerned to le Gruyère AOP.

The goal of the competition is to create a direct contact between the producer and the consumer.

Goldmedals

Le Gruyère AOP

Dairy Echarlens, Frédéric Pasquier, matured by Mifroma SA, Ursy

Dairy l'Auberson, Vincent Tyrode matured by Margot Fromages SA, Yverdon-les-Bains

Dairy Moléson SA, Michel Grossrieder matured by Fromage Gruyère SA, Bulle

Bio Fondue mix

Dairy Echarlens, Frédéric Pasquier

Fondue moitié-moitié

Dairy Friesenheid, Louis-Alexandre Yerly

Silvermedals

Le Gruyère AOP

Dairy Grandcour, Jean-Daniel Jaeggi, matured by Fromco SA, Moudon

Le Gruyère AOP Bio

Dairy Les Moulins, Pierre Buchillier, matured by Fromco SA, Moudon

Fondue mix

Dairy Echarlens, Frédéric Pasquier

Dairy Sommentier, Erich Hunkeler

Dairy Moléson SA, Michel Grossrieder

Bronzemedals

Le Gruyère AOP

Dairy Sommentier, Erich Hunkeler, matured by Fromage Gruyère SA, Bulle

Dairy Pomy, Christophe Cujean, matured by Mifroma SA, Ursy

Le Gruyère d'Alpage AOP

Alp Tissiniva, Jacques Ruffieux, matured by Coopérative fribourgeoise des producteurs de fromages d'Alpage



World Cheese Awards

OLMA Alpine cheese competition, St. Gallen, 11th October 2019

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

Le Gruyère d'Alpage AOP of Nicolas Brodard, Alpage La Guignarde, Corbières, won the second price in the category hard cheese.

This cheese was matured by Coopérative fribourgeoise des producteurs de fromages d'Alpage.

Le Gruyère d'Alpage AOP of Philippe and Michaël Ruffieux, Alpage Varvalanna, Val de Charmey, won the 6th price in the category hard cheese.

This cheese was matured by Coopérative fribourgeoise des producteurs de fromages d'Alpage.

Le Gruyère d'Alpage AOP of Christian Bourquenoud, Alpage Le Creux, Intyamou, won a degree in the category hard cheese.

This cheese was matured by Coopérative fribourgeoise des producteurs de fromages d'Alpage.

World Cheese Awards, Bergamo, Italia, 18th to 19th October 2019

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

Best Le Gruyère Cheese Trophy

Franz Jungo, cheese dairy Strauss, for his Gruyère AOP matured by Cremo Von Mühlenen SA, Fribourg/Guin

Super Gold

Franz Jungo, cheese dairy Strauss, for his Gruyère AOP matured by Cremo Von Mühlenen SA, Fribourg/Guin

Philippe Dénervaud, cheese dairy Villaz-St-Pierre, for his Gruyère AOP matured by Fromco SA, Moudon

Philippe Geinoz, cheese dairy Les Sagnettes, for his Gruyère AOP matured by Margot Fromages SA, Yverdon (2 medals)

Gold

Franz Jungo, cheese dairy Strauss, for his Gruyère AOP matured by Cremo Von Mühlenen SA, Fribourg/Guin

Alexandre Guex, cheese dairy Châtonnaye, for his Gruyère AOP matured by Cremo Von Mühlenen SA, Fribourg/Guin (2 medals)

Adrian Scheiddegger, cheese dairy Niedermuhren, for his Gruyère AOP matured by Cremo Von Mühlenen SA, Fribourg/Guin

Cheese dairy Cremo, for his Gruyère AOP matured by Fromage Gruyère SA, Bulle

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

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

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

Silver

Daniel Rohrbach, cheese dairy Develier, for his Gruyère AOP matured by Emmi SA, Kirchberg

Olivier Bongard, cheese dairy Düdingen, for his Gruyère AOP matured by Cremo Von Mühlenen SA, Fribourg/Guin

Markus Sturny, cheese dairy Lanthen, for his Gruyère AOP matured by Cremo Von Mühlenen SA, Fribourg/Guin (2 medals)

Adrian Scheiddegger, cheese dairy Niedermuhren, for his Gruyère AOP matured by Cremo Von Mühlenen SA, Fribourg/Guin (2 medals)



Cheeses of Excellence 2020 by the State Council of the canton of Fribourg



Neuchâtel canton's Cheese of Excellence



Cheese of Excellence 2020 by the State Council of the canton of Vaud

Cheese dairy Cremo, for his Gruyère AOP matured by Fromage Gruyère SA, Bulle

Bronze

Adrian Scheiddegger, cheese dairy Niedermuhren, for his Gruyère AOP matured by Cremo Von Mühlenen SA, Fribourg/Guin

Olivier Bongard, cheese dairy Düdingen, for his Gruyère AOP matured by Cremo Von Mühlenen SA /Guin

Philippe Geinoz, cheese dairy Les Sagnettes, for his Gruyère AOP matured by Margot Fromages SA, Yverdon

Fondue World Championship, Tartegnin, 16 novembre 2019

On Saturday, 16 November 2019, the 3rd edition of the Fondue World Championship took place in the small town of Tartegnin in Vaud.

The two winners of this year competition are:

Florian Baer from Troistorrents (VS) and his father Jean-Mathieu Baer from Etagnières (VD) World Champion / Professional Category

Christian Maillardet and Daniel Villard from Rolle, La Côte (VD) World Champion / Amateur Category

Neuchâtel canton's Cheese of Excellence

L'Interprofession du Gruyère congratulates Adrien Pagnier for the honours bestowed on him by the canton of Neuchâtel. His Gruyère AOP from Les Bayards and matured by Fromco SA in Moudon has been named its Cheese of Excellence for 2020.



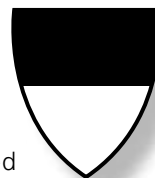
Cheese of Excellence 2020 by the State Council of the canton of Vaud

The *Interprofession du Gruyère* are delighted that Le Gruyère AOP of the cheese dairy Montricher, produced by Etienne Aebischer and refined by Fromco SA in Moudon, has been selected by the State Council of the canton of Vaud as their Cheese of Excellence of 2020. Le Gruyère AOP was chosen during a blind taste-testing carried out by the State Council.



Cheeses of Excellence 2020 by the State Council of the canton of Fribourg

The *Interprofession du Gruyère* is delighted that the State Council of Fribourg has chosen the Gruyère AOP from Billens cheese dairy, produced by Bernard Oberson and matured by Mifroma SA in Ursy, as the cheese of excellence for 2020. This competition, in which Neyruz cheese maker Philippe Pasquier was honoured for his Vacherin fribourgeois AOP, was organised jointly with the *Interprofession du Vacherin fribourgeois*.



Awards presentation of Interprofession du Gruyère

On 2nd October 2019, the *Interprofession du Gruyère* honoured in Grangeneuve its best producers of Gruyère AOP and Gruyère d'Alpage AOP over the last 5 years.

The cheesemakers of Gruyère AOP



Gold Medals

Didier Bovet (19.87) Cheese dairy of Corcelles-le-Jorat matured by Mifroma SA

Frédéric Pasquier (19.69) Cheese dairy of Echarlens matured by Mifroma SA

Alexandre Guex (19.65) Cheese dairy of Châtonnaye matured by Cremo Von-Mühlenen

Frédéric Pasquier (19.55) Cheese dairy of Echarlens BIO matured by Mifroma SA

Jean-Marie Dunand (19.51) Cheese dairy of Le Crêt matured by Fromage Gruyère SA

Pierre Reist (19.44) Cheese dairy of Lugnorre matured by Milka AG/ Emmi AG

Gaël Niquille (19.42) Cheese dairy of Grangeneuve matured by Fromage Gruyère SA

Etienne Aebischer (19.41) Cheese dairy of Montricher matured by Fromco SA

René Pernet (19.39) Cheese dairy of Peney-le-Jorat matured by Fromco SA



Cheesemakers and representatives of their milk society who received a gold medal



Silver medals

Christen Blaise (19.37) Cheese dairy of La Joux-du-Plâne matured by Fromco SA

Adrien Pagnier (19.36) Cheese dairy of Les Bayards matured by Fromco SA

Benoît Déforel (19.36) Cheese dairy of Sâles matured by Mifroma SA

Gilbert Golay (19.33) Cheese dairy of Penthéraz matured by Margot Fromages SA

Jean-Jacques Clément (19.32) Cheese dairy of Moudon and Cheese dairy of Jaun matured by Fromco SA / Fromage Gruyère SA

Erich Hunkeler (19.31) Cheese dairy of Sommentier matured by Fromage Gruyère SA

Bernard Oberson (19.29) Cheese dairy of Billens matured by Mifroma SA

Pierre-Alain Uldry (19.29) Cheese dairy of Pont-la-Ville matured by Mifroma SA

Vincent Gapany (19.29) Cheese dairy of Rueyres-Treyfayes matured by Fromage Gruyère SA



Cheesemakers and representatives of their milk society who received a silver medal



Bronze Medals

Emmanuel Pillier (19.28) Cheese dairy of Semsales matured by Fromage Gruyère SA

Philippe Dénervaud (19.28) Cheese dairy of Villaz-St-Pierre matured by Fromco SA

Jean-Claude Carrel (19.27) Cheese dairy of Villargiroud matured by Fromage Gruyère SA

Olivier Habegger (19.23) Cheese dairy of Brenles-Chesalles-Sarzens matured by Fromco SA

Nicolas Schmoutz (19.23) Cheese dairy of Mézières matured by Fromco SA

Benoît Kolly (19.23) Cheese dairy of Mouret matured by Milka AG / Emmi AG

Alain Cardinaux (19.22) Cheese dairy Aeschlenberg matured by Fromage Gruyère SA

Jean-Paul Favre (19.22) Cheese dairy La Sionge matured by Fromage Gruyère SA

Gérard Equey (19.20) Cheese dairy of Vuisternens-devant-Romont matured by Mifroma SA

Gérald Raboud (19.20) Cheese dairy of Courgenay matured by Fromco SA

Gérald Clément (19.20) Cheese dairy of Praroman and Cheese dairy of Prez-vers-Noréaz matured by Fromage Gruyère SA / Intercheese AG



Diplomas

Claude Kolly (19.18) Cheese dairy of Rossens matured by Mifroma SA

Marc-André Girardin (19.17) Cheese dairy of Bière matured by Fromco SA

Serge Jeanmonod (19.17) Cheese dairy of La Côte-aux-Fées matured by Margot Fromages SA

Dominique Caille (19.15) Cheese dairy of Romanens matured by Mifroma SA

Jean-Daniel Jaeggi (19.11) Cheese dairy of Grandcour matured by Fromco SA

Olivier Philipona (19.10) Cheese dairy of Vuadens matured by Mifroma SA

Vincent Tyrode (19.09) Cheese dairy of L'Auberson matured by Margot Fromages SA

Stéphane Menoud (19.09) Cheese dairy of Les Chaux matured by Mifroma SA

Nicolas Charrière (19.08) Cheese dairy of Vuisternens-en-Ogoz matured by Mifroma SA

Franz Jungo (19.08) Cheese dairy of Strauss matured by Cremo Von-Mühlenen

Silvio Kaeser (19.05) Cheese dairy of Charmey matured by Lustenberg & Dürst AG

Philippe Favre (19.05) Cheese dairy of Vaulruz matured by Fromage Gruyère SA

Alexandre Schaller (19.04) Cheese dairy of Villarimboud matured by Fromco SA

Dominique Descloux (19.02) Cheese dairy of Cottens matured by Mifroma SA

Daniel Maurer (19.02) Cheese dairy of Chézard-St-Martin BIO matured by Milka AG / Emmi AG

Michel Grossrieder (19.02) Cheese dairy of Moleson Orsonnens matured by Fromage Gruyère SA

Jérôme Raemy (19.02) Cheese dairy of Autigny matured by Fromage Gruyère SA

Daniel Rohrbach (19.01) Cheese dairy of Develier BIO matured by Emmi AG

Yvan Dénervaud (19.01) Cheese dairy of Villarzel matured by Fromco SA

Charles Magne (19.01) Cheese dairy of Vuarrens matured by Fromco SA



Cheesemakers and representatives of their milk society who received a diploma

The cheesemakers of Gruyère d'Alpage AOP



Gold Medals

Martial Rod (19.63) Alp La Moesettaz matured by Fromage Gruyère SA

Marcel Progin (19.54) Alp Gros-Plané matured by Mifroma SA

Pierre & Yvan Brodard (19.49) Alp Grenerêts-Carratoleyre matured by Mifroma SA



Silver medals

Christophe Esseiva (19.39) Alp Brenleires-Crosets matured by Fromage Gruyère SA

Jacques Ruffieux (19.37) Alp Tissiniva matured by Coopérative fribourgeoise des producteurs de fromages d'Alpage

Nicolas Brodard (19.30) Alp La Guignarde matured by Coopérative fribourgeoise des producteurs de fromages d'Alpage



Bronze Medals

Cédric & Hugo Pradervand (19.29) Alp La Givrine matured by Fromage Gruyère SA

Daniel Bühler (19.25) Alp Twanbergli matured by Milka AG / Emmi AG

Samuel & Philippe Dupasquier (19.24) Alp Le Lity matured by Coopérative fribourgeoise des producteurs de fromages d'Alpage



Alpine herdsmen who have received an award

Diplomas

Christian Bourquenoud (19.22) Alp Le Creux matured by Coopérative fribourgeoise des producteurs de fromages d'Alpage

Christian & Pierre Boschung (19.21) Alp En Chenau matured by Fromage Gruyère SA

Société Menoud-Mesot-Vial (19.21) Alp Le Grand Boutavent matured by Fromco SA

Freddy & Stéphane Charrière (19.16) Alp Parc-es-Fayes matured by Fromage Gruyère SA

Maurice Bapst (19.16) Alp Vacheresse-Liti matured by Coopérative fribourgeoise des producteurs de fromages d'Alpage

Nicolas Remy (19.10) Alp Les 2^{ème} Groins matured by Coopérative fribourgeoise des producteurs de fromages d'Alpage

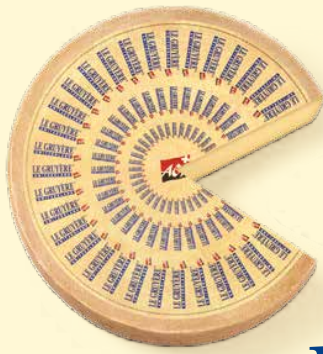
Philippe & Michaël Ruffieux (19.05) Alp Varvalanna matured by Coopérative fribourgeoise des producteurs de fromages d'Alpage

Hans Koenig (19.03) Alp La Vatia d'Avau matured by Coopérative fribourgeoise des producteurs de fromages d'Alpage

Béat Piller (19.01) Alp Vounetz matured by Coopérative fribourgeoise des producteurs de fromages d'Alpage

Emmanuel & Patrick Mauron (19.01) Alp Gros Caudon Les Guedères matured by Fromage Gruyère SA





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Marketing

Maintaining outstanding quality, a suitable selling price, and at the very least conserving its market share in Switzerland whilst increasing it abroad - these are the marketing objectives of the *Interprofession du Gruyère*. This marketing strategy is based on the following points:

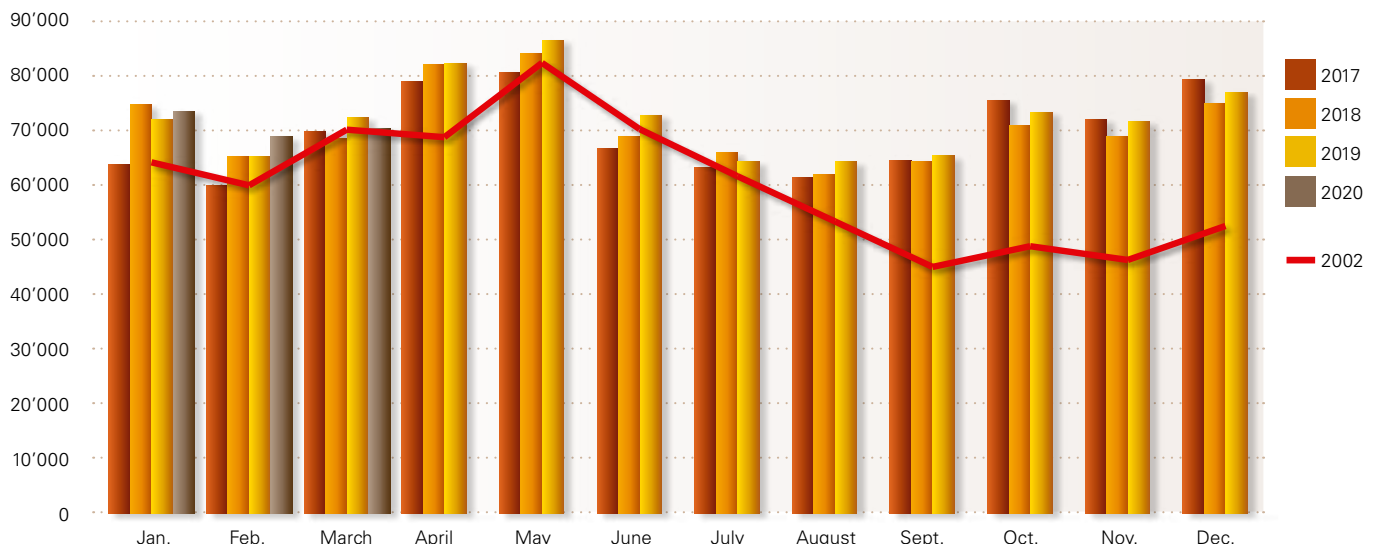
- Strict quality management controls
- Quality management in accordance with the provisions of the Specifications
- Ensuring profitability
- Value for the customer
- Encouraging and supporting sales of Gruyère AOP nationally and internationally
- Defending Le Gruyère AOP brand

The Interprofession is proof that Le Gruyère AOP has a soul and that there is an emotional connection between this noble cheese, the association and consumers. Its activities are focused on assuring the product's quality and maintaining both the local and artisanal production of Le Gruyère AOP, which relies on the know-how of the entire association, while respecting the following mission:

- The AOP is the common thread.
- The cheese's history, the upholding of traditions, regional production and the involvement of real people form the backbone of any promotion.
- The product is central to any communication.
- Le Gruyère AOP sells because of its flavour.

Comparison of production (casein markings)

Number of wheels



The best ambassadors for the association are always its members. This is why it is important that everyone at all levels promotes the 'Le Gruyère AOP Switzerland' brand by respecting the guide to good marketing practices that defines the role of each person - the producers, the cheesemakers, the affineurs and the administration of the Interprofession - in order to best position Le Gruyère AOP as a brand with added value.

On a national level, TV advertising was carried out across the various regions of Switzerland. Le Gruyère AOP was seen on TV news programmes, weather forecasts, billboards and also in cinemas. Its presence on social media and the internet was strengthened. In order to renew the slogan 'Born in Switzerland in 1115' an agency pitch was formulated to consolidate consumer awareness through the initiation of a new campaign. Taking into account the decision of the members of the marketing commission, a new agency has been chosen and will start work in the second part of 2020.

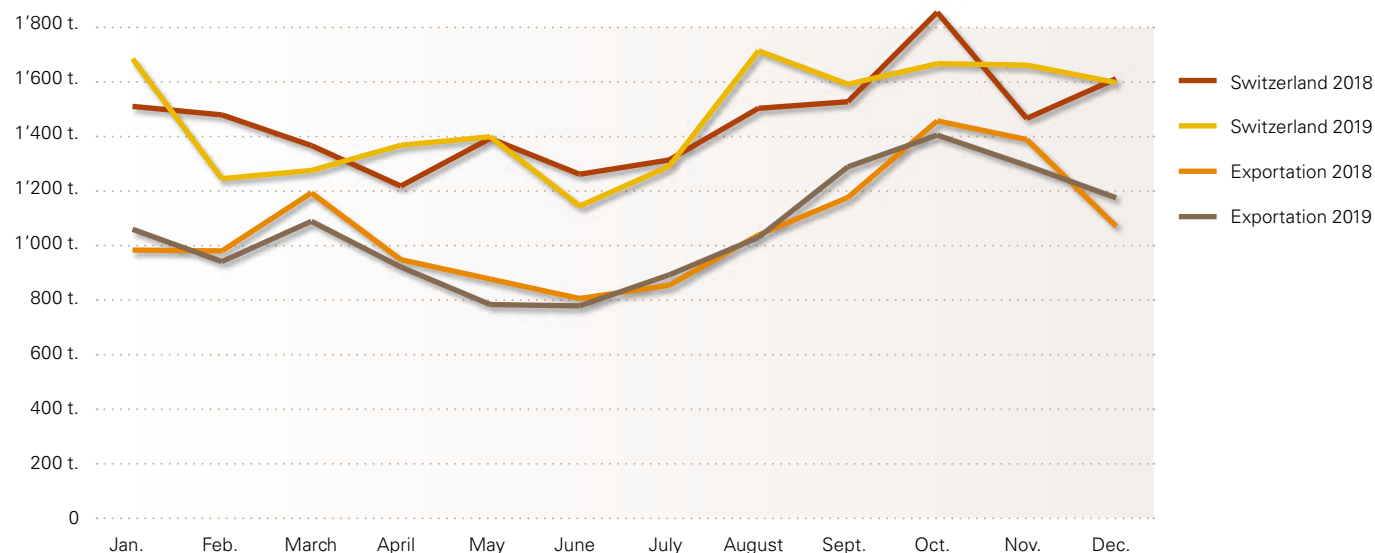
Le Gruyère AOP, in coordination with the Association for the Promotion of AOP-IGP and Switzerland Cheese Marketing (SCM), made its presence felt at promotional fairs such as the MUBA, LUGA, BEA, Foire du Valais, OLMA, Slow Food Market, Les Automnales, the Food Expo in Bern and the Salon des Goûts et Terroir in Bulle. Some 3.8 tonnes of all varieties of Gruyère AOP and 3 tonnes of fondue mix made up of at least 50% Le Gruyère AOP were sold there. Cheesemakers from the association are regularly involved in local events to allow visitors to taste the different types of Gruyère AOP, Gruyère AOP Bio and Gruyère d'Alpage AOP cheeses. As contact with the consumer is a priority, tasting activities in the retail trade sector have been maintained, with a focus on the German-speaking Swiss market. Le Gruyère AOP was honoured by *Gastro Vaud* and *Gastro Fribourg* at 2 fondue events. The highlight of the year for this dish was the Fondue World Cup in Tartegnin, where professionals and amateurs competed in good humour to find the best recipe composed of a minimum of 50% Gruyère AOP.

Le Gruyère AOP's promotional activity in Switzerland saw this noble cheese being prominently showcased on stage at the flagship event of summer 2019, the *Fête des Vignerons* (Winegrowers' Festival). In collaboration with the *Confrérie du Gruyère*, festival goers' discovery of the product during the *veveysan* summer was further enhanced by the installation of a production chalet which introduced consumers to how Le Gruyère AOP is produced and the rules outlined in the Specifications. In order to increase the national visibility of the brand, Le Gruyère AOP has also been associated with the various activities of the Federation of Vaud Cantonal Youth, the *Paléo Festival* in Nyon and *Zermatt Unplugged*, delighting festival-goers with Hot Fondue. The collaboration between Zermatt and Le Gruyère AOP allows visitors to use electric buses throughout the tourist site that bear the colours of Le Gruyère AOP, leaving a lasting impression on the minds of international visitors. Support in the form of product samples were given to schools undertaking ski camps or other school activities so as to make young consumers aware of the unique taste of Le Gruyère AOP. The collaboration initiated with schools in Marly was a great success. It should also be noted that, as part of the joint initiative with *Vacherin Mont d'Or AOP*, *Etivaz AOP* and the *Terravin* wine quality stamp, supported by the State of Vaud, it is currently possible to present these different traditional high-quality products in the various hotel schools of the region and thus introduce them to students from all over the world.

In the context of wine-cheese collaboration, it is worth noting Le Gruyère AOP's support for the *Mondial du Chasselas* and its active participation in the Brussels competition held in Aigle over the summer.

Internationally, the Interprofession is investing substantial resources abroad with the support of federal funds linked to its cooperation with Switzerland Cheese Marketing (SCM) in the countries in which it operates. These regions are supported by a structure dedicated to the promotion of Swiss cheeses.

Sales 2018-2019 in tonnes



In France, despite strong competition, Le Gruyère AOP volumes increased slightly by +0.5%, amounting to a total volume of 1,595 tons. Promotional pressure is intense. A large number of tasting and promotional activities were carried out on the market both in supermarkets and at specialist cheese shops. Activities in the field made it possible to set up specific POS displays and tasting kits in more than 600 supermarkets. Across the traditional retail network, specific tasting events were organised to promote Le Gruyère AOP in cheesemongers' shops. The combination of traditional and digital media communication enables a maximum number of contacts to be made and increases sales. Le Gruyère AOP was also present at events for the general public, such as the *Salon de l'Agriculture*, the Bourg-en-Bresse AOP-IGP Show, the *Rencontres AOP* in Cambremer, the *Antony Wine and Cheese Fair*, the *Saveurs gastronomic show* in Paris and the *Monte-Carlo Gastronomy Show*.

Highlight of 2019: The 2019 edition of the Month of Le Gruyère AOP

In October, Le Gruyère AOP was the star cheese at 115 cheesemongers in Paris and in the Parisian region for the whole month. Le Gruyère AOP Réserve and Le Gruyère d'Alpage AOP were made available for tasting. In addition, delivery vans and a vintage Citroën van in the colours of Le Gruyère AOP offered tastings too.

In Germany, the cheese market as a whole was unable to record growth in either value or volume. Nevertheless, Germany remains by far the largest market in the European Union for Le Gruyère AOP. On the other hand, and despite major promotional efforts, the brand registered a drop of 64 tonnes out of a total of 3,160 tonnes. The number of 'Käsetheken', counters, where custom cuts of cheese are sold, is decreasing annually, while the number of Swiss cheeses is increasing, offering a wider variety of cheeses at

lower prices. The availability of Le Gruyère AOP is being maintained or even increased in the face of increased competition in order to trigger additional purchases through promotions. Every month, more than 3,500 points of sale are visited to set up support measures, distribute recipe brochures and run competitions to convey important information and brand values. These promotions are widely advertised on social media and website banners and covered by the trade press. The brand reaches more than 65.3 million interested readers via selected food magazines chosen on the basis of purchasing power. Le Gruyère AOP was able to delight visitors to the FIS Cross-Country Skiing World Cup in Oberstdorf and Dresden in January. When it comes to food and drink,

Anuga is the place to be. The world's largest trade fair is the most important of such meetings for Le Gruyère AOP, where international visitors were able to see and taste the different types of Gruyère AOP, Gruyère AOP Bio and Gruyère d'Alpage AOP cheese. At trade fairs for the general public, Gruyère AOP exhibited at 'Grüne Woche' in Berlin at the end of January.

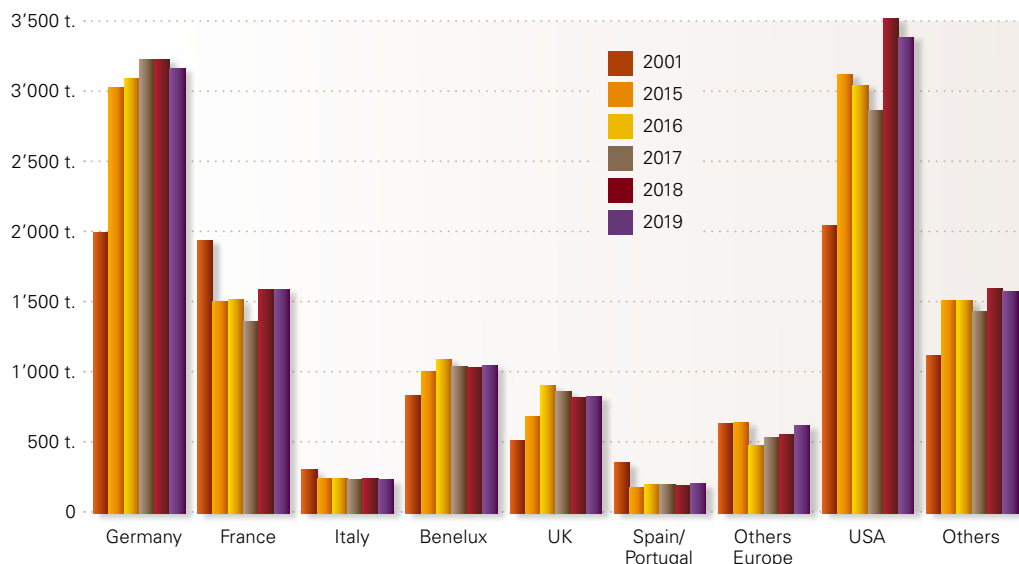


Highlight of 2019: Foodboom Traveller

The online food platform 'Foodboom Traveller' is currently very successful in the lifestyle & gastronomy community. A fruitful co-operation between Le Gruyère AOP and the influencer Hannes Arendholz, combined with a digital campaign at trade fairs, has generated more than 2.3 million views and the campaign video has attracted more than 560,000 views on Instagram.

In Benelux, the volumes of imported Le Gruyère AOP increased by around 1% in 2019. Since 2013, Le Gruyère AOP has been the most popular Swiss cheese in the Benelux region. In Belgium, the entire cheese market is recovering in volume after 2 years of contraction. The Netherlands is

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 7'673)
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)
Total 2019:	12'684	(EU 7'722)

slowly opening up to foreign cheeses. The Grand Duchy of Luxembourg is a market that is characterised by a purchasing power well above the European average with a great affinity for Le Gruyère AOP.

The brand supports supermarket demand through tastings and advertisements in the chains' magazines. The cheesemonger network reinforces the positioning of Le Gruyère AOP by showcasing the different maturities and Le Gruyère AOP Bio: every Saturday in Belgium there is an event in a different shop that requires the cheesemongers to present three varieties of Gruyère AOP. The brand is also present at the Dutch trade fair (*Vakbeurs Foodspecialiteiten*) in Utrecht and at the Christmas market in Liège where it has a Swiss chalet dedicated to Le Gruyère AOP fondue.

Highlight of 2019: Double-starred Belgian chefs ambassadors of Le Gruyère AOP

The Interprofession is building a communication strategy for Le Gruyère AOP based on transmitting its expertise, values and taste. This area of communication positions Le Gruyère AOP as a naturally premium, gastronomic product with remarkable flavour. In September, two double-starred Belgian chefs were invited to Gruyères. Lionel Rigolet (*Comme chez Soi***, Brussels) and Viki Geunes (*'t Zilte***, Antwerp). The chefs were accompanied by four journalists from the three Benelux countries. For these lifestyle & gastronomy magazines, discovering the world of Le Gruyère AOP through the eyes of the chefs gives their readers an additional and original angle. Press coverage was published in *De Morgen Magazine*, *Foodies Magazine*, *Plus Magazine* and *Tendances*.

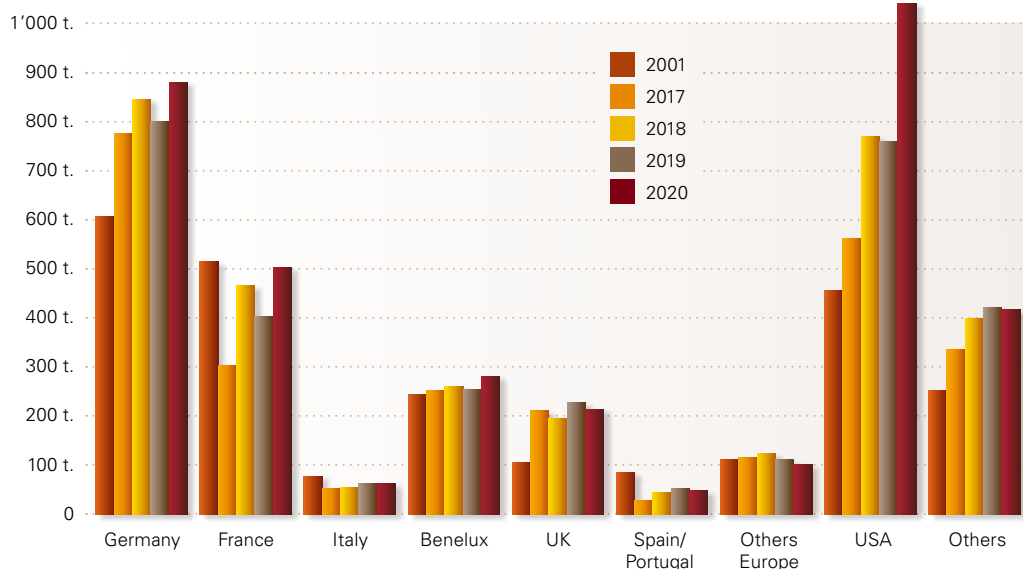
As a result of Brexit, the economic situation in **Great Britain** has been difficult. The Interprofession is continuing its work to position Le Gruyère AOP as a Swiss cheese that lends itself well to all kinds of culinary uses. Targeted promotions

are designed to make Le Gruyère AOP the number one Swiss cheese, with the aim of not only making the product attractive to the end consumer, but also increasing its presence in supermarkets. The trend among British consumers to reduce their meat consumption should prove advantageous for the Gruyère AOP market, as consumers are open to replacing meat with cheese in ready meals. The presence of Le Gruyère AOP is underpinned by a selection of consumer and trade fairs. These aim to reach consumers in a context quite different from that of the points of sale and to boost the image of Le Gruyère AOP in the United Kingdom, including Scotland and Ireland. Knowledge of the specific characteristics of Le Gruyère AOP is disseminated to those concerned and in particular distribution professionals, via training and information in specialist press and over social networks.

In Italy, which has a stable cheese market, Le Gruyère AOP lost -1% compared to the previous year. Le Gruyère AOP is co-marketing with Emmentaler, Italy's flagship product. A large number of promotions in 186 points of sale have been set up to encourage consumers to buy Le Gruyère AOP in hypermarkets. More than 130 sales actions were implemented in 3,806 points of sale nationwide to massively cover the most successful sales areas, such as the northern and central regions. In terms of competition, the biggest challenge comes from the presence of local cheese specialities in direct competition with Le Gruyère AOP. Brand awareness is supported by digital marketing such as communications on Facebook and Instagram which are the best media to reach the gourmet food target audience. This was also achieved through participation in the *FORME cheese festival*, *Cheese 2019* and *Artigiano* in Fiera fair.

In Spain, Le Gruyère AOP remains the most consumed Swiss cheese with 298 tonnes. With more than 200,000 contacts per year, the Interprofession supports a tasting

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)
Total 2020:	3'552	(EU 2'093)

programme in supermarkets, hypermarkets and the traditional trade sector. The brand is present at gastronomic events such as the *Salón de Gourmets* in April which welcomes more than 96,000 visitors. Ongoing actions support Le Gruyère AOP in the written press and on social networks.

In Portugal, participation in the European Cross Country in Lisbon in December featured Le Gruyère AOP tastings in the VIP area.

Promotional efforts and marketing activities did not, however, increase sales in Italy and Spain. The Interprofession, together with the trading companies, is carrying out an in-depth analysis on how to grow Le Gruyère AOP sales volumes in these two countries.

In the Nordic countries, Sweden dominates the share of Le Gruyère AOP sales, followed by Finland, Denmark and Norway. These markets represent an excellent outlet for Le Gruyère AOP, as the consumption of cheese per capita is very high, especially in Denmark where the annual per capita consumption is 28,1 kg and in Finland 27,1 kg. The decision to implement a new SCM structure will increase the efficiency of the work carried out. Le Gruyère AOP remains the most consumed Swiss cheese in the Nordic countries with almost 510 tonnes. The marketing action plan includes a series of activities and tastings at points of sale through the 'Swiss Cheese on Tour 2019'. Le Gruyère AOP was present in all four countries. In addition, culinary activities in the form of recipes, such as the Gruyère AOP - Swiss Burger campaign, were carried out. Le Gruyère AOP used various traditional media, press, public relations and new media channels to convey our core messages and high quality guarantee to Nordic consumers. Collaboration with food bloggers and brand ambassadors expanded our digital strategy. For Le Gruyère AOP, sponsoring sports events is also an important vehicle in the North. Many major events, such as the Le Gruyère AOP European Curling championship in Helsingborg or the European Junior Athletics Championships in the cities of Gävle and Borås took place in Sweden over the course of the year. In addition, the presence of Gruyère AOP along the cross-country ski tracks is an asset in a region such as this, which is very much geared towards this sport during the long winter periods.

Highlight of 2019 : Stockholm food fair

Among the many highlights of the year was the *Stockholm Food and Wine Fair* in November. Le Gruyère AOP marked its presence with a 49m² stand and showed its versatility by showcasing the different maturations alongside Le Gruyère AOP Bio to Swedish consumers through a number of activities and an exhibition kitchen.

The *Interprofession du Gruyère* has maintained its approach of investing in different countries included in the so-called **new markets or export initiatives**. In an application of the sales promotion provisions of the Law on Agriculture, specific activities in accordance with the co-financing rules published by the OFAG enable us to take steps to increase

sales of Le Gruyère AOP through new outlets, bringing to the fore one-off solutions in agreement with the trading companies. These investments take place in countries that represent a development potential for Le Gruyère AOP sales.

In the USA, the establishment of the SCM North America branch will enhance collaboration with commercial players and partnerships with Switzerland Tourism and SWISS in promotional events held in New York, Washington DC, San Francisco and Chicago. The *Interprofession du Gruyère* is present with its own stand at the Fancy Food Show, a trade fair held in January in San Francisco and in June in New York. The United States is the main export market for Le Gruyère AOP. The communication budget is commensurate with this key position and should enable the company to increase its reputation on a long-term basis. Le Gruyère AOP can be considered the driving force behind Swiss cheeses in the USA through traditional advertising channels as well as in digital media.

Canada represents a high-potential market for Le Gruyère AOP, even if it is tied to import quotas. This is why promotional projects are being carried out in this country by setting up tasting sessions in supermarkets.

Russia is under an embargo imposed by the European Union in August 2014. The excellent reputation of Le Gruyère AOP, in general, means that it is a product appreciated by Russian consumers with high purchasing power. The brand is present at Prodexpo, Russia's largest food industry trade fair. However, possible expansion in this country is hampered by problems with customs controls, which the Swiss administration is trying to resolve.

Japan is avant-garde in many areas and is a gateway to other Asian markets for Le Gruyère AOP. The positive growth prospects according to the assessment of the firms present are supported by the Interprofession by a marketing mix. The aim is to target the end consumer and to recruit new consumers by boosting the brand's image.

Australia is a modern western market economy, offering its citizens one of the highest standards of living in the world. Across its various activities in support of Le Gruyère AOP, the Interprofession prioritises its image as a high-end brand. A media plan in the gastronomic press supports Le Gruyère AOP's presence at the *Good Food and Wine Show fairs* in Brisbane, Melbourne and Sydney.

Sponsoring

Sport is still a sure bet for Le Gruyère AOP when it comes to sponsoring on a national and international scale. Currently the primary objective is to increase the brand's visibility. Ensuring the best possible audience also means choosing the time of exposure and the number of people reached. Depending on the budget devoted annually to sponsorship, the *Interprofession du Gruyère* must choose the right target and continue to gain notoriety through a diversity of media by identifying the best audience whilst counting on



public relations to enhance the image of *Le Gruyère AOP*. In addition, at each event the product is presented both for the general public and in the VIP areas.

The brand was visible, among others, in athletics competitions, at international meetings - Athletissima in Lausanne and Weltklasse in Zürich - and also at the competition for future hopefuls, Mille Gruyère, organised by the Swiss Athletics Federation.

The *Interprofession du Gruyère* also collaborates with the European Athletics Association to take part in various competitions organised by this body.

Le Gruyère AOP also supports cross-country skiing World Cup competitions on all continents. The promotion of Le Gruyère AOP in the Nordic countries is the strategic objective of this collaboration. Television broadcasts help to consolidate the brand's reputation. *Le Gruyère AOP European Curling Championship* held its last edition in Helsingborg, Sweden at the end of November. The images broadcast worldwide give the brand an excellent promotional presence.

Throughout the winter season, Le Gruyère AOP continued its support of the HC Fribourg Gottéron team during the National Ice Hockey Championship with its signature dish of fondue being served at every home game.

Nowadays, every company must also be a digital company. New technologies make it possible to stay permanently connected, anywhere, anytime. The vast majority of customers check the online image of Le Gruyère AOP before buying and using it. All these activities are supported by the website www.gruyere.com, translated into nine different languages. This allows the Interprofession to smoothly navigate this new paradigm. In September a project to completely overhaul the site and implement a digital strategy with the main aim of strengthening the emotional bond between consumers and the brand began. To be convincing and effective, it is essential to stand out in new media such as Instagram, Facebook and Pinterest in order to consolidate the notoriety of the Le Gruyère AOP brand.

All these activities have strengthened the sale of Le Gruyère AOP in Switzerland and worldwide over the course of the year. They

are supplemented by numerous public relations activities and visits to **La Maison du Gruyère**, one of the flagship showcases for Le Gruyère AOP, by foreign sales managers and journalists from various European countries and overseas. The building houses not only the headquarters of the Interprofession, but also the exhibition showing how the cheese is made, which attracted more than 670,000 visitors in 2019. In each region of the Gruyère area, certain cheese dairies also promote Le Gruyère AOP with spectator galleries like the cheese dairies in Les Ponts-de-Martel in the canton of Neuchâtel, in Montricher in the canton of Vaud and, more recently, in Le Noirmont in the Jura.

The Interprofession is actively involved in the Swiss Cheese School courses which, for the French-speaking part of Switzerland, were held in the building of La Maison du Gruyère. These courses are devoted to the knowledge, cutting and presentation of Swiss cheeses.

Without these comprehensive marketing activities, Le Gruyère AOP would not be as well-known and would not be where it is today. The national sales volume of 17,573 tonnes accounts for 58% of total sales of Le Gruyère AOP. The remaining 12,685 tonnes are exported to 55 countries.

Any promotion is in vain if it is not based on a quality product. In this respect, the work of the entire association is vital for the future success of the brand. It is thanks to its taste and quality that the consumer buys and tries Le Gruyère AOP and remains loyal to it. The challenge is to maintain this strategy in order to increase international market shares while preserving Le Gruyère AOP's position in Switzerland.



2019 Events

January to March 2019

Giant Xtour

9th to 12th January 2019

Swiss Expo, Lausanne

13th to 15th January 2019

Winter Fancy Food Show, San Francisco

30th January 2019

Finale Bocuse d'Or, Lyon

8th to 17th February 2019

Muba, Basel

10th February 2019

Trophée des Gastlosen

23rd February to 3rd March 2019

Paris International Agricultural Show (SIA)

Between March and September 2019

Regional finals of Mille Gruyère

1st to 3rd March 2019

European Athletics Indoor Championships, Glasgow

2nd March 2019

Expo Bulle

2nd and 3rd March 2019

Diablerets 3D

16th and 17th March 2019

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

16th to 24th March 2019

WCCC Silkeborg/Denmark

9th to 13th April 2019

Zermatt Unplugged

24th April to 29th May 2019

BCN Tour, Neuchâtel

26th April to 5th May 2019

LUGA, Lucerne

26th April to 5th May 2019

BEA, Berne

May to September 2019

Wake UP and Run

2nd to 5th May 2019

Concours Mondial de Bruxelles, Aigle

31st May to 2nd June 2019

Wine and Food Show Melbourne, Australia

8th and 9th June 2019

Open Wine Cellars event in the canton of Vaud

13th to 15th June 2019

Sierre Blues Festival

21st to 23rd June 2019

Wine and Food Show Sydney, Australia

23rd to 25th June 2019

Summer Fancy Food Show, New York

28th and 29th June 2019

Mondial du Chasselas, Aigle

3rd to 21st July 2019

100th Anniversary of the Fédération Vaudoise des Jeunes-ses Campagnardes, Savigny

5th July 2019

Athletissima, Lausanne

7th July 2019

European Mountain Running Championships, Zermatt

11th to 14th July 2019

European Athletics U23 Championships, Sweden

14th July 2019

Slow Up, La Gruyère

18th to 21st July 2019

European Athletics U20 Championships, Sweden

18th July to 11th August 2019

Winegrowers' Festival, Vevey



23rd to 28th July 2019

Paléo Festival, Nyon

9th to 11th August 2019

European Team Championships, Poland

10th to 17th August 2019

International Alpine Film Festival, Diablerets

14th to 11th September 2019

Groupe E Tour, Fribourg

27th to 29th August 2019

Weltklasse, Zürich

5th to 10th September 2019

Production at the Zürich station/Terroir VD

12th to 15th September 2019

Gourmesse, Zürich

13th and 14th September 2019

Open Bike, Haute-Gruyère

20th to 23rd September 2019

Cheese Festival of Bra, Italy

27th September to 6th October 2019

Foire du Valais, Martigny

2nd October 2019

Awards presentation of Interprofession du Gruyère, Grangeneuve

5th to 9th October 2019

Anuga, Germany

10th to 20th October 2019

OLMA, Saint-Gallen

25th to 28th October 2019

Wine and Food Show Brisbane, Australia

30th October to 3rd November 2019

Salon des Goûts et Terroirs, Bulle

November 2019 to March 2020

Cross country skiing World Cup

8th and 9th November 2019

Vully Blues Festival, Praz

8th to 17th November 2019

Les Automnales, Geneva

15th to 23th November 2019

Le Gruyère European Curling Championship, Sweden

16th November 2019

Le Mondial de la Fondue, Tartegnin

16th November 2019

1st Swisskills, dairy technologist

20th to 24th November 2019

Festival des Rencontres de l'Aventure, La Tour-de-Trême

29th November to 1st December 2019

Food Expo, Bern

29th November to 30th December 2019

Christmas Village Liège, Belgium

30th November to 1st December 2019

Tchiiz Festival, Gruyère

December 2019 to March 2020

Kids Nordic Tour, French-speaking part of Switzerland

5th to 7th December 2019

Open Doors event in the canton of Vaud

6th to 7th December 2019

Junior Expo Bule

8th December 2019

European Cross country (running) Championships, Portugal

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



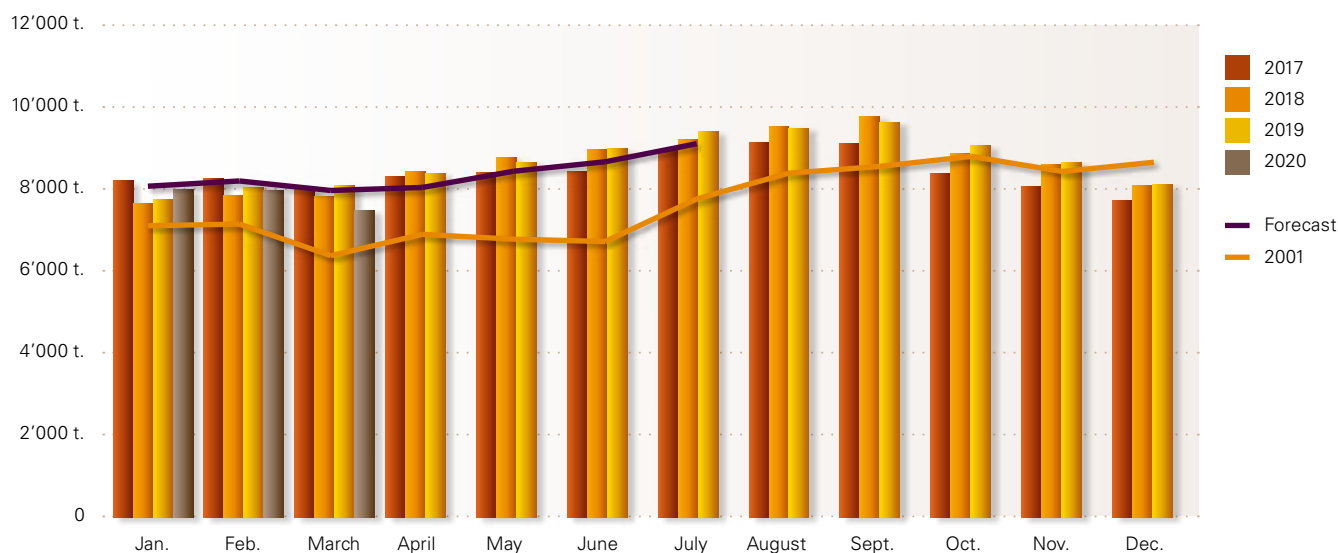
Governing bodies within the Interprofession du Gruyère

Under the presidency of Mr Oswald Kessler, re-elected in 2019 along with the entire Committee, the *Interprofession du Gruyère* continued work on its various organisational and administrative tasks. The Board of Direction met four times to prepare the Committee's activities and define staff policy.

The Committee met for 12 sessions, including a two-day seminar held at *Hotel Endroits* in La Chaux-de-Fond. Here the guidelines for the work of the Interprofession were rediscussed. Its vision focuses upon strict quantity management and faultless traceability while maintaining or even increasing final product and milk prices. In addition, Le

Gruyère AOP Switzerland brand should spearhead all activities. Discussions were also held on the need to carry out a vast study on the future of the association, its activities and, ultimately, its marketing. The Committee came to a decision regarding the PA22+ consultation and supported doubling the non-silage premium to 6 ct per kilo of milk and maintaining the supplement for milk processed into cheese at 15 ct, while staggering it according to fat content. Over the course of the year, this wide-ranging analysis on the operation and future of the association was launched. A mandate was given to a French agency with experience in AOP products and more industrial food chains. These topics will be discussed with the entire association. The first findings of this study

Comparison of stock evolution (end of March 2020) in tonnes





will be examined in 2020. The Committee is concerned about market evolution while supporting a strict and flawless application of the Specifications. On the basis of the tools at their disposal, the governing bodies of the Interprofession were able to maintain quantities across the entire basic quota which, it should be recalled, is 101 % of the 2019 quota. In order to analyse in the best possible way the fluctuation of sales in relation to production and the evolution of stocks, the Committee relies on a new document entitled Cockpit. The various indicators of this document have been refined in order to enable an even more precise management of stocks in the short and medium term.

It should be noted that the producers on the Committee, who had been mandated to define craftsmanship in milk production for the production of Gruyère AOP, are in the process of carrying out a study to clarify the contours of sustainability on farms. The initial results of this study were presented first to the Board and then to the Committee. This challenging subject will be addressed again in the course of 2020 in order to inform any changes within the association that guarantee a future for milk production.

The Assembly of Delegates met twice. One of the meetings took place in St. Cierges in the spring and focused on approving the accounts and the annual report alongside the statutory renewal of the various bodies. A second meeting was scheduled in the autumn to define principally the quantities to be produced for 2020. At the same time, the budget was approved. The quantities decided for the current year are 100% for individual dairies with an increase awarded to 2 satellites. This makes it possible to definitively settle the problem of compliance with the rules of the Interprofession and the Specifications linked to the transitional provisions put in place at the time of AOP recognition in 2001. At the same time, the Assembly of Delegates voted for a significant increase in the quantity of Le Gruyère AOP Bio to be produced, involving around 110 tonnes in existing sites and around 60 tonnes in a new site. In addition, it was decided that a quantity would be allocated for a new cheese dairy being built in Châtel-St-Denis for 2022. This point is dealt with in detail in the chapter on the Bio Commission.

The Alpage Commission, which aims to deal specifically with Le Gruyère d'Alpage AOP, met twice. In the spring, given the good market situation, it was possible to definitively confirm for the summer production the 3% granted temporarily in 2018. Questions relating to the quality and characteristics of the alpine pastures were also discussed in this context. It should be noted that in 2020, a new mountain pasture will be put into production in Singine at Riggisalp.

The Bio Commission met 4 times. Whereas for many years one of the issues it had to deal with was the recurrent lack of valorisation of 50 to 100 tons of organic products, since the end of 2018, the trend has been reversed, resulting instead in a lack of goods in this market segment. Consequently, the Commission analysed how a relatively rapid increase in quantity could be achieved in order to supply the various markets in Switzerland or in certain foreign countries. The rule is that additional organic quantities should only be granted to existing suppliers or new producers who fully comply with the AOP's specifications, but also to those for organic products as of 1 January 2020. It has been possible to allocate additional quantities firstly to existing cheese dairies by utilising the capacity of the vats and secondly by granting the possibility of producing a vat of Le Gruyère AOP Bio cheese to a dairy located in the canton of Neuchâtel. This scheme resulted in an additional volume of around 170 tonnes of Le Gruyère AOP Bio from 1 January 2020, bringing the total to 1,300 tonnes. As previously announced, a new quantity should be put into production at the beginning of 2022 following the construction of a new cheese dairy in Châtel-St-Denis.

The Marketing Commission held 3 meetings. It focused its attention on promotional work in the various international markets where Le Gruyère AOP is present and thus determined its priorities. It also defined a new campaign for the national market. The functioning and composition of this Commission will have to be clarified in the future.

The Planning Commission met 3 times. One of the issues discussed was the increase in Le Gruyère AOP Bio, but also the planning of new cheese dairies and the quantities of Le Gruyère AOP associated with them. This body must also consider what form it should take to continue to increase the quantities in clear and precise compliance with the Specifications. The decisions of the Planning Committee may be subject to appeal. At this level, the Quantity Management Appeals Board met twice. It rejected part of the appeals lodged and accepted one.

The Quality Commission held 3 meetings. It focused on the evolution of the quality of Le Gruyère AOP, which is in a very good state, as can be seen in the chapter related to this point. However, care must be taken to ensure that production techniques maintain the artisanal character of the product while maintaining an inimitable taste. Where a particular problem is present in one or other of the cheese dairies, an ad hoc committee is appointed to accompany them and propose solutions to the sites concerned. A committee of this type met once. It should also be noted that in the quality-related work confirmed by the Committee, a certain automatic feeding method was accepted.



In the quality field, a subject which is very much in the spotlight is the improvement and reinforcing of the identification and overall traceability of Le Gruyère AOP on the market. This is supported by research being carried out on both the identification of origin crops and surface marking. Tangible results should be presented in the second half of 2020 or early 2021.

The 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 such as Caséi, Arqha and Agroscope. The marketing department, coordinated by the Director, had a year in which all positions were filled. In effect, this division was able to count on the presence of Ms Catherine Merian, Ms Anaïs Grandjean and Ms Marie L'Homme as well as Mr Philippe Gremaud and Mr Denis Kaser. This team was able to carry out the various tasks described in the marketing chapter.

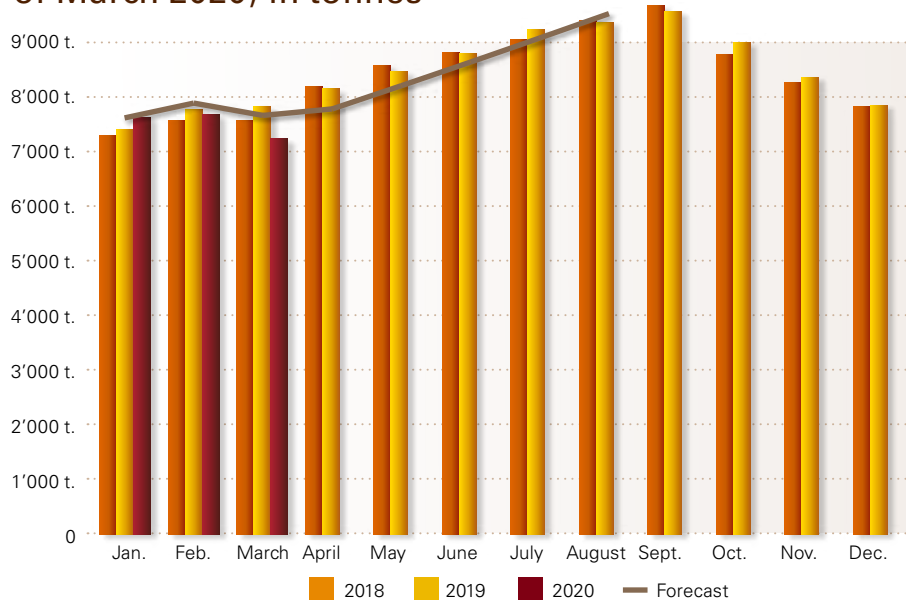
For the management of promotional material, the association still relies on Mr Meinrad Gaillard.

Secretarial support has been provided by Ms Christine Grandjean and Ms Julie Sudan. Following a sick leave, this sector was assisted at the end of the year by Mrs. Anouk Désobry.

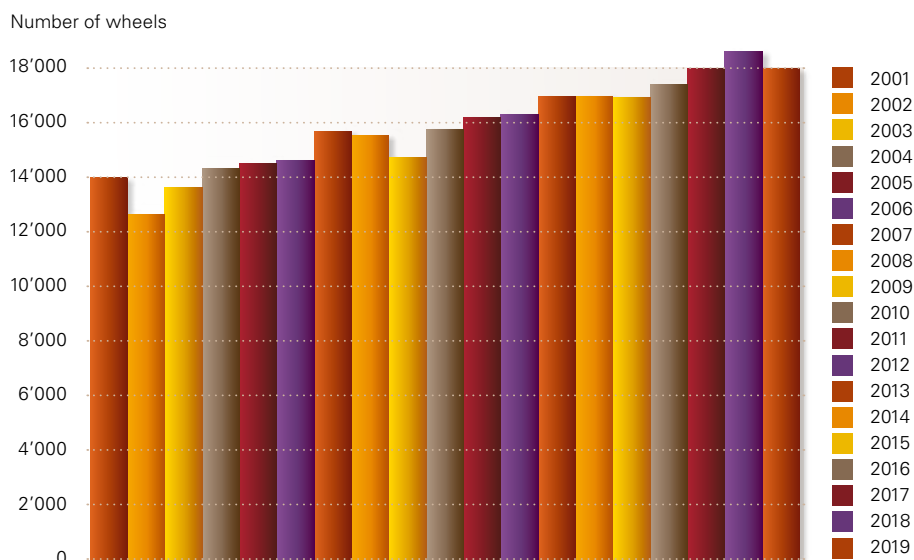
The accounts are kept by Ms Magali Vuichard and Ms Sandy Uldry (50% each).

This motivated team will enthusiastically continue its work to promote and defend Le Gruyère AOP for the year 2020.

Comparison of stock evolution excluding Alpage (end of March 2020) in tonnes



Comparison of Alpage production (casein markings)





Committee members as of December 31, 2019

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	Didier Germain** René Pernet Adrian Scheidegger Nicolas Schmoutz	Les Ponts-de-Martel Peney-le-Jorat Niedermuhren Mézières FR
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 2020

In 2020, the governing bodies of the Interprofession will have to try to resolve the problems posed by the consequences of Covid-19 on the sale and promotion of Le Gruyère AOP. This work will be carried out on the basis of the basic principles defined previously, which are:

Quantity

- Apply a management and planning tool (cockpit) in a spirit of transparency and trust with qualitative growth as its objective. -> *Inventory, production and sales alert thresholds are continuously checked in order to best respond to market variations.*
- Reinforce measures and decisions to ensure compliance with the rules and to combat imitations. -> *The IPG together with the AOP-IGP Association will request the implementation of the Savary motion to ensure the installation of sworn vigilance agents within the Interprofessions.*

Quality

- Set up a quality observation system (intrinsic and global) right down to the points of sale, taking into account consumer expectations (panel). -> *Following studies conducted by the Zollikofen Engineering School (HAFL), precise monitoring for the purpose of quality preservation is now in place.*
- Set up a monitoring system to chart the evolution of production and installation techniques in relation to the quality of Le Gruyère AOP. -> *A collaboration with Agroscope, Arqha and Casei has been put into place.*

Profitability

- Ensure the profitability of the association, its stakeholders and administration. -> *A process of price increases within the association was carried out in the first half of the year.*
- Analyse the implementation of a legally recognised internal commercial coordination structure.

Clients

- Analyse and define the image, history, strengths and charac-

teristics of Le Gruyère AOP -> *The issue of craftsmanship and sustainability will have to be analysed in each group and more specifically the difference between working within an AOP association as compared to mainstream production.*

- Analyse and define what we want to convey to the client and the consumer.

This in-depth and analytical work can call upon a pleasing observation made during the early days of the Covid-19 crisis when Le Gruyère AOP was seen as a safe haven.

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 in the light of current events.*
- Strengthen the marketing structure of the *Interprofession du Gruyère* by redefining the objectives, tasks and responsibilities of those involved.
- Develop a communication concept and a new advertising strategy for Switzerland that can be extended to other markets if necessary.

The future of the *Interprofession du Gruyère*

- Set up a risk analysis system for the *Interprofession du Gruyère* addressing the issue of a possible pandemic (Risk management).
- Promote and further the identification of members to the sector to which they belong. -> *Each member of the association showcases Le Gruyère AOP Switzerland brand. The results of the survey conducted to strengthen collaboration within the sector and overall support for the promotion of Le Gruyère AOP Switzerland shall be analysed.*

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

Recapitulation of the distribution of the total production potential for Le Gruyère AOP per cheese dairy and per canton for 2020

Canton	Villages			Bio			Villages + Bio		Alpages			All		
	Quantities (Kg)	(%)	Nbr	Quantities (Kg)	(%)	Nbr	Quantities (Kg)	(%)	Quantities (Kg)	(%)	Nbr	Quantities (Kg)	(%)	Nbr
FR	15'037'389	51.25	82	375'607	28.90	4	15'412'996	50.30	201'283	35.40	32	15'614'279	50.03	114
VD	8'273'136	28.20	39	341'608	26.28	3*	8'614'744	28.11	346'250	60.89	21	8'960'994	28.71	61
NE	2'875'802	9.80	15	171'367	13.18	2	3'047'169	9.94				3'047'169	9.76	16
JU	701'810	2.39	3	156'814	12.06	1	858'624	2.80				858'624	2.75	3
JUBE + al.	880'616	3.00	5	101'751	7.83	1	982'367	3.21	21'128	3.72	3	1'003'495	3.22	8
BE	947'463	3.23	8	132'680	10.21	1	1'080'143	3.53				1'080'143	3.46	8
Other cantons	625'516	2.13	6	20'000	1.54	1	645'516	2.11				645'516	2.07	7
Total	29'341'732	100.00	158	1'299'827	100.00	13*	30'641'559	100.00	568'661	100.00	56	31'210'220	100.00	217

* Cheese dairies producing Bio: 12 cheese dairies producing both Traditional and Bio Gruyère AOP plus 1 dairy producing only Bio.



LE GRUYÈRE®

SWITZERLAND



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