

LE GRUYÈRE®
SWITZERLAND 

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l'oiseau



20 Protégé par l'AOP depuis 20 ans.
Seit 20 Jahren AOP-geschützt.
Tutelato dall'AOP da 20 anni.

LE GRUYÈRE®
SWITZERLAND 

Annual report 2020
of the Interprofession du Gruyère



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Cover photo

Manfred Bötsch, former Director of the FOAG, when the AOC was obtained on 6 July 2001. © LA LIBERTE / VINCENT MURITH

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Message from the President

We are celebrating 20 years of AOP protection of Gruyère!

On 6th July, 2001 our Gruyère received the Appellation d'Origine Contrôlée (AOC), an important step for the future and today's success.

Where are we going?

With a vision and much conviction, a team succeeded in overcoming the obstacles of that time; a constructive response to the economic planning and dairy industry of Switzerland. It was an enormous undertaking, a commitment with passion, heart and soul!

I invite you to read attentively the article of our Director, Philippe Bardet, who actively participated in that task, in this edition of our annual report.

Thank you and congratulations to all those who fought for ten years to obtain this protection.

Where are we?

The results for 2020 are very gratifying!

A record breaking year for the Interprofession du Gruyère AOP:

- Production 32,600 tonnes
- Exported 12,250 tonnes
- Milk processed 340 million kg
- Milk price 88.5 cts
- With a fair distribution of the contribution margin between the association members!

According to the study "Havas Brand Predictor" Le Gruyère AOP is perceived by its consumers as the brand which inspires the most confidence in Switzerland. Last year, I was invited to the conference titled "Nos Interprofessions tous des modèles de fin de série?" (Is it the end of all our Interprofessional models?) My response to this question would have been the following: "No! TOGETHER WITH PASSION AND DISCIPLINE WE ARE STRONG!"; an arguable response with the functionality of the Interprofession du Gruyère and the priority

of strategical objectives such as quality, quantity management, profitability, the added value for consumers, the future of the brand and the future of the Interprofession. Unfortunately, this conference was cancelled at the last minute due to Coronavirus.

Where are we headed?

When things go too good for too long, it can become dangerous! We must make it clear that unity is the key to strength, and that the rules decided by the majority of our democratic organisation must be respected. Individual interests must take a back seat.

The committee is working on future strategies. After the survey of our members, we grouped the proposals and concerns under different potential themes of action in order to evaluate the opportunities and risks of a potential change to the current strategy. We will present it with concrete proposals at the Interprofession du Gruyère Delegates Assembly.

It is essential to know what we need to do in the future for our 2,000 family businesses, but it is also important to know what we must not do! It is the consumers who keep our value chain alive. Producing an excellent cheese is not enough. Our consumers want to know: where it comes from, who made it, how it is made, and increasingly, they want it to be produced with respect for the animals and the environment: 'Added value for the consumer'.

Every step in the development of our product must make sense under the leitmotiv: I contribute to the success of our Gruyère AOP Switzerland!

Thank you to all the actors and members of the Interprofession of Gruyère for the results and success of our Gruyère AOP Switzerland!



Oswald Kessler
President of the
Interprofession



History of the AOP protection

Although it certainly knew others, 1115 and 1655 are two of the historical dates in the long history of Gruyère AOP. However, in this year 2021, there is a more recent history to look back on in order to understand the good year 2020 that Le Gruyère AOP experienced despite such a difficult period in the context of Covid. In order to have a clear approach for Le Gruyère AOP, it was necessary that certain persons fought to save it during the last century; such as Mr. De Gottrau who during the 20s attempted to anchor Le Gruyère as the Swiss French cheese in an international context. The Swiss Confederation did not aide him at that time. In fact, many years later, it was the latter who gave Gruyère its credentials by granting it the protected designation of origin AOP, which in 2001 was initially an AOC (appellation d'origine contrôlée). To achieve this recognition, certain significant events were required. Firstly, the creation of the Confrérie du Gruyère on 1 May 1981, a brotherhood which remains unique in that its primary goal is to defend and promote a single product, Le Gruyère. This entity, which today takes on a role of accompanying the activities of the Interprofession, was originally established to defend Le Gruyère and its history as an artisanal terroir product.

In the beginning of the 90s, an extensive industrial dairy project for Le Gruyère in the Singinoise and Bernoise regions created a reaction in the French-speaking cantons. In fact, under the aegis of the CSSAR (conférence des chefs de service de l'agriculture des cantons romands), a request was made to the FSASR, today knows as AGORA, to do everything in its power to safeguard the interests of Le Gruyère and to make it an AOC. This request was transmitted by an intermediary, Mr. Charles Pilloud, then Director of the Agricultural School in Grangeneuve, today the IAG, an important school whose goal is to become a national centre for raw milk with an international scope. Mr. Pilloud would later become the author of the historic AOC application submitted in 1998. The document addressed to the

FSASR, was the Gruyère Charter, signed, not without some difficulty, by the various dairy and cheese organisations or authorities at the time, on 2nd July, 1992 at the emblematic site of Faverge. This approach was backed by the OFAG. Two key persons in the development of this dossier played a decisive role, namely Mr. Michel Pellaux and Mr. Frédéric Brand. The signing of the charter granted the mandate for the development of a document to obtain the AOC for Le Gruyère.

At that time, there was nothing to allow this at a national level. The cheese market was governed by the Union Suisse du Commerce de Fromage (USF) (Swiss Cheese Trade Union) and the definition of Gruyère was rooted in the ordinance on the designation of Swiss cheese. This legal text gave more or less broad contours to the definition of the product, its area of production, as well as its production methods. At that time, the USF seemed to be in a position to regulate the details of the sale of the country's various cheeses in Switzerland and abroad. However, some voices were raised to prove that this parastatal structure was too expensive and not efficient enough. Thus, a certain wind of liberalism in the milk and cheese industry blew through the federal parliament. At the same time, Switzerland began its strange relationship with the European Union. It was in 1992 that we refused to join the EEA. After that, we tried to establish bilateral agreements on many subjects. Agriculture was very quickly included in this process of sectoral agreements. That is why the members of the charter committee, as well as those of a working group aiming to find solutions for the cheese market, if the FSU was abolished or remodelled, turned to the neighbouring countries to see what solution was adopted. Following the example of the great French and Italian cheeses and food products such as Comté, Champagne, Parmigiano Reggiano and Parma Ham, the path of protection and management through an AOP and an interprofession quickly became apparent.

Study trips and exchanges were organised until 1998. In 1999, the AOP-IGP association was created under the im-



Registre des appellations d'origine et des indications géographiques

Catégorie produits agricoles transformés: fromage

La dénomination

Gruyère

est inscrite au registre fédéral comme

appellation d'origine contrôlée

Décision du 6 juillet 2001

Le directeur

na. Zöbdi



petus of the pioneers of the cause, Mr Jacques Henchoz and Martine Jacques-Dufour, respectfully President and Director. At the same time, these foreign experiences made it possible, thanks to the members of parliament from the French-speaking part of Switzerland and St. Gallen, to include in the agricultural laws a provision allowing appellations to be recognised and protected on the basis of an AOC, now AOP or IGP for protected geographical indication. These texts were directly inspired by the legal bases ratified by the European Union in 1992. This aspect made them compatible with the mutual recognition of appellations, which was achieved in 2011. Armed with this legal framework, the various organisations set about drawing up specifications to ensure that the right to protect a particular product was recognised. To carry out this task, interprofessions were created based on the representativeness of the various trades involved in the production of a product. This is how, with assistance from the Swiss Federal Institute of Technology in Zurich (EPFZ), under the guidance of Mrs Dominique Barjolle, the Interprofession du Gruyère (IPG) was created on 2 June 1997 with the aim of having an AOC for Le Gruyère recognised and defended and of doing everything possible to ensure the promotion and proper marketing of the cheese of the same name. The IPG wanted to take over the tasks previously carried out by the USF, with the exception of one, namely the marketing of the product. This task was left to the market stakeholders. The IPG is there to provide guidance and support, but not to guarantee structural deficits indefinitely. The IPG was intended to be consumer-oriented in the interests of the people who develop Le Gruyère AOP every day.

The first President of the IPG was Mr. Pierre Dubois, former State Councillor of Neuchâtel, and the first Secretaries were Mr. Jean-Marc Collomb (Secretary of the

new post-USF structure working group) and Mr. Philippe Bardet (Secretary of the Charter Commission). In the autumn of 1998, the latter became the Director.

The IPG's first task was to draw up a set of Specifications for Le Gruyère and to prepare a proposal for its recognition. Nothing was easy at that time because there was no precise framework. A commission called the AOP-IPG commission had been set up by the Confederation. However, its role was not clear, nor was its prerogatives. Additionally, the FOAG did not have any precise rules for dealing with the applications it received. For example, the file examiner was not allowed to speak directly to the IPG. As mentioned above, the Gruyère application was filed with this body on 22 January 1998. It was handled by Mr. Pellaux, Mr. Brand and Ms. Pasche. Following several discussions, the final text was published in the official notification bulletin. It was the subject of many objections, for example from the Cremo, Emmi and Milka companies and several cheese-makers and cheese companies as well as the association of cast iron trading companies. These various objections were dealt with personally under the auspices of the FOAG, the newly formed IPG administration and, to some extent, a Bernese lawyer, Mr. Jurg Simon, who later became the President of the Emmental Interprofession.

Thus, the product development articles were partially rewritten. The exception for once-a-day deliveries was introduced. The size of the vats and the related exception was redefined. The provisions on labelling were rewritten with precise aspects allowing for the presence of affinage or marketing companies from Switzerland. Similarly, the provisions for melted products were introduced, i.e. the use of the name Gruyère without the trademark. In June 2001, during a meeting conducted by the OFAG, the final

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objections were withdrawn by the creation of historical manufacturing and affinage satellites which stipulated 3 months in the zone and the rest up to 5 months in Switzerland. On the strength of this historic agreement signed at this meeting on 6 July 2001, the recognition and protection of Gruyère as an AOC, now an AOP, became a reality and was granted by the Director of the OFAG at the time, Mr Manfred Bötsch. It should be noted that the Specifications protecting the name Le Gruyère cover two names: Le Gruyère and Le Gruyère d'Alpage with their specific aspects.

On the basis of this real backbone, the Specifications, the upgrading of the entire Gruyère production process could thereby begin.

Everything is linked to the Specifications: the quality scheme for both the producer and the cheesemaker and ultimately the affineurs. Traceability with the numbered casein mark was applied, whereas in the 90s it was a utopia. Black market cheese is now a distant memory. The promotion of the product could be initiated on clear and precise rules by putting forward a brand linked to a flawless labelling. Thanks to this new standard, all packaging on the market systematically applies the Le Gruyère AOP Switzerland brand. The promotional focus is on a raw milk cheese based on modern artisanal production.

Thus, the baptismal foundation was built to give Le Gruyère the chances of success it is currently enjoying in the various markets. Nothing is guaranteed, as the AOP is always in balance between consumer desires and production potential. A compromise between tradition and modernity. The AOP is defended throughout the world and it is a constant battle to prevent the name from being used incorrectly or fraudulently in Switzerland as well as in countries near and far. In this respect, we must not forget to thank the important work done by the Confederation and the OFAG as well as the IPI, by giving the competences to Mr Brand in the 90's to keep Gruyère from entering the Codex

Alimentarius and becoming generic. Or again in 2011 having given Mr. Jacques Chavaz, then Deputy Director of the OFAG, the competence to negotiate a mutual recognition with the European Union which today allows protection in the territories neighbouring Switzerland.

This promising momentum may soon be cut short as it was decided to abolish the AOP/IGP commission in 2019. This is a bad signal for the future of this system of protection where its treatment is diluted at the level of the federal administration. It is to be hoped that the appointment of Mr Olivier Isler, former manager of the Tête de Moine Interprofession, will remove these doubts. At the same time, it is to be hoped that the administration will be swift in bringing into force the Savary motion (former President of the Association of AOP-IGPs) on surveillance officers. No designation can thrive without an effective control system.

The strength of the AOP is not sufficiently recognised because this concept does not fit into the classic framework of trade schemes. In fact, on the basis of a collective approach, it allows a healthy distribution of the appreciation, including for the producers of the raw material, while guaranteeing that these production tools are not relocated. The AOP ensures a good territorial and financial distribution of its overall impact.

It also generates regional economic activity. Without the AOP approach, the OIC, the advisory services, Caséi, Arqha and many activities linked to the work and construction of cheese dairies and farms would not exist or would no longer exist. More importantly, for Le Gruyère, this noble product would no longer exist in its current form. It would certainly be square, perhaps pasteurised with cognac or pepper, much to the regret of the consumers, near and far, who appreciate it daily in good times and in bad, as we have seen this past year. Let us keep this course for the future of the association and the success of this culinary treasure for years to come.



20 years of Gruyère AOP: the lessons of a success story

For Gruyère, the Protected Designation of Origin (AOP) is a real success story! Twenty years ago, when the Gruyère AOC launch party was in full swing at Forum Fribourg, the future was far from clear. The tension among the participants was so full of expectation that it was almost palpable.

It must be said that at the time, the political and legal process of establishing the AOC, which resulted from the reorganisation of the milk market, was still in its infancy. Before this reorganisation, the State alone decided who could produce which cheese and where. This is why there were producers of 'Gruyère', whose historical origins are rooted in Gruyères, as far away as the Mittelland and even in Central Switzerland. With the decision of the FOAG to register Gruyère in the AOC register, the geographical area of production had to be defined and restricted in the name of credibility, while at the same time a fair solution had to be found for cheese dairies located outside the traditional production area.

The solution took the form of a compromise: a restrictive - and therefore credible - limitation of the production zone with exceptions for historical reasons for bona fide cheese dairies. This concession was not to the liking of various political actors, who rose to the occasion to oppose it. This discontent was fuelled by all those who considered the new, more liberal organisation of the milk market and its innovations to be inappropriate and who made this known at the political level. These circles also made themselves known at Forum Fribourg, advocating resistance and predicting a political fiasco. To make matters worse, the "Röstigraben" was invoked and cursed, as the legal institution of designations of origin was historically rooted in French-speaking cultural and legal circles.

The tension was also palpable among the representatives of the FOAG, who had to deal with political interventions and legal steps that could have jeopardised the new organisation of the milk market.

The supporters and promoters of Gruyère AOC were no more relaxed. Indeed, they had carried the project with passion and enthusiasm, but without practical experience, it was impossible for them to know whether it would be an economic success or not. And since euphoria alone is not the key to long-term success...

With hindsight, we can humbly say that the opposition did not prevail, that the solution of the "satellite" cheese dairies did not in any way undermine the credibility of the AOC/AOP and that Gruyère AOP has blossomed into an impressive economic success.

All's well that ends well? History does not repeat itself, no, but the following lessons can be learned:

Firstly, in order to create the necessary basis for building trust, it is essential to have a reliable and transparent process in place. And trust is essential for long-term change. It is a process that needs to be carried out, even if it takes a great deal of time and effort.

Secondly, even 'opponents' deserve understanding and respect. Otherwise they will remain on the other side! All satellite dairies were visited individually to justify and explain the decision. It was also possible to convince the public that it was in everyone's interest to opt for solutions that were close to market realities. With this approach, presumed losers became stakeholders. They understood that the success of a AOC depends on a credible and rigorous technical definition, reflected in a precise specification that guarantees real differentiation.

And thirdly, it is necessary to have a stable, cooperative and voluntary body which ensures the high quality of the product through strict requirements and controls, which generates consumer awareness of the AOC through sophisticated marketing measures, and which allows a fair distribution of the economic appreciation between milk producers, cheese makers and affineurs. This is the only way to get all the players on board with the organising body and Specifications. This represents a lot of work and requires honesty and trust.

The recipe for the success of Gruyère AOP lies in the fact that these three conditions have been skilfully met. That is why I have great respect for all those who have worked so hard for Gruyère AOP over the past 20 years! I would like to congratulate you on this anniversary and on this extremely pleasing SUCCESS. I wish you every success for the future as well!



General situation

The year 2020 was a very peculiar one for Le Gruyère AOP, as it was for each and everyone.

Just as everything was getting off to a great start: record exports in January, low stock levels, making it possible to calmly discuss a price increase as of 1st April, a little red flag went up somewhere in Asia, in the form of a virus called Covid-19.

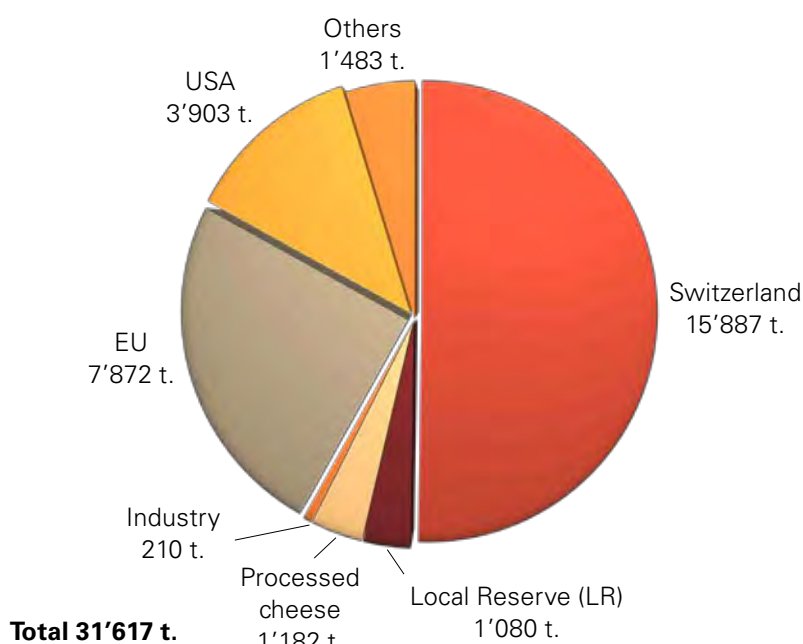
This virus eventually surrounded us, confining us in mid-March. Many thought that the market would come to a halt with catastrophic consequences for the smooth running of farms, cheese dairies and affineurs. After some hesitation, sales went back up without too much trouble, with a record level of exports, as well as sales in Switzerland. It is clear that at a time when difficulties are mounting in other economic sectors, Le Gruyère AOP seems to be a safe haven, not only in the kitchen, but also in the few moments of conviviality that we can still share. This complicated, yet encouraging situation permitted our partners to continue their daily work producing their noble cheese while ensuring its traceability and quality controls, which are essential for its proper sale.

In this context, the promotion of Gruyère AOP remains relevant but must be reviewed in various ways. It is certainly the fundamental groundwork carried out over the last 20 years which gives Gruyère AOP a healthy vigour in the current market. Here too, the year started well with beautiful images of cross-country skiing competitions, where our brand had good visibility. This same cheese accompanied the young athletes at the very successful 2020 Youth Olympic Games. In the end, Le Gruyère AOP gave Fribourg Gottéron the energy they needed to qualify for the play-offs. At the same time, the TV weather reports were punctuated by Le Gruyère AOP.

We were also present at the Fancy Food Show in San Francisco in mid-January and at the Salon de l'Agriculture at the end of February. And then suddenly the promotional world came to an abrupt halt. To keep the brand in people's minds, we invested in some radio advertising.

At present, all tasting activities and presence at trade fairs have been suspended until this winter and maybe even longer depending on the evolution of the situation. Promotional activities will be carried out by distributing packaged Gruyère AOP with some explanations on its production. The association was able to support and sponsor certain sports activities such as the Mille Gruyère and the new season of the cross-country skiing World Cup, even though there was little or no audience present. It was clearly necessary to strengthen the promotional pres-

Repartition of the Gruyère AOP consumption during 2020 in tonnes





ence on social media and on advertising in general. In this context, a new campaign was launched at the end of September in Switzerland, with future variations destined abroad. On the theme of 'Born in Switzerland in 1115', featuring only real people, the association showcases a milk producer, a cheesemaker, an affineur and an appraisal officer in their daily work. At the same time, the website has been completely redesigned to serve the consumer even better. All these activities are explained in detail in the marketing chapter.

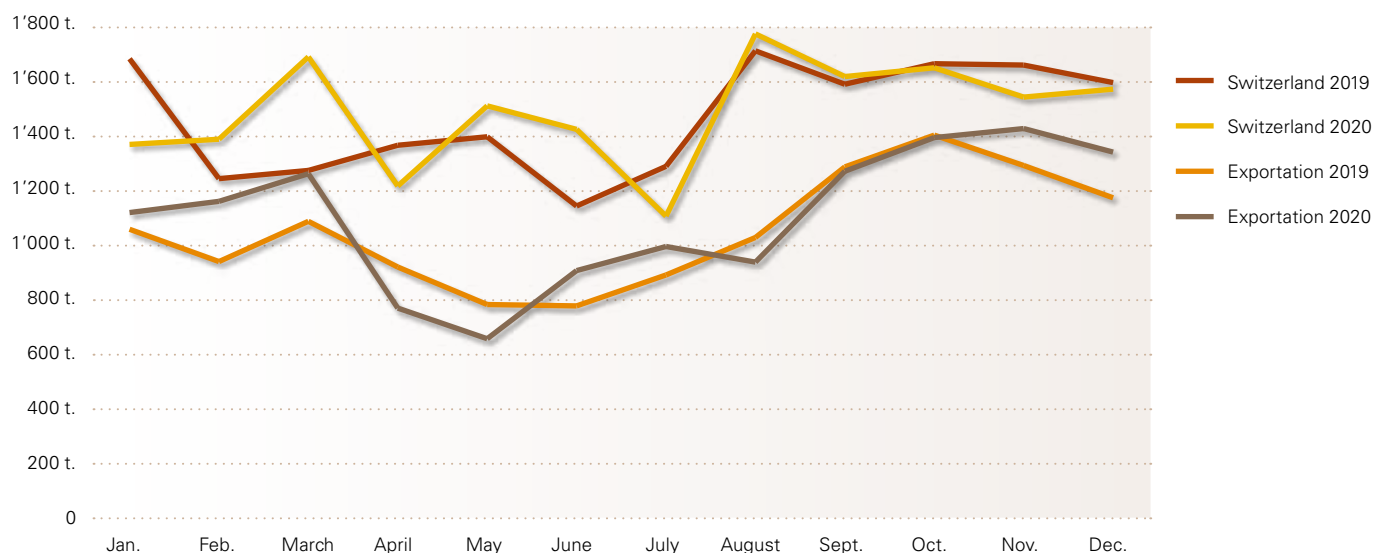
It is also regrettable that the various events, the inaugurations of new cheese dairies or renovations could not take place. These moments are a sign of the vitality of

the association with welcome exchanges that we hope to see again very soon.

On the arrival of the 20th anniversary of the AOP, at the end of 2019, the association launched a vast survey of its customer base. Unfortunately, the uncertainties of Covid did not allow this dossier to be treated, so it was resumed in the first half of 2021. Feedback on the results will be given in the second half of this year.

In short, thanks to its excellent quality and a high-level brand image, Le Gruyère AOP has managed to hold its own and can look to the future with confidence.

Sales 2019-2020 in tonnes





Quantity management

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

The markets for traditional Gruyère AOP, Gruyère AOP Bio as well as Gruyère d'Alpage AOP are dealt with separately, while at the same time, providing an overall view of production.

The volume allocated in 2020 was, according to the planning given, maintained in the volumes granted at the beginning of 2019, i.e. an increase in the basic quota of 1% for traditional Gruyère AOP and for Gruyère AOP Bio. As a result, on the basis of the new reference quota, the overall volume allocated was 30,640 tonnes, 63 tonnes of which are of qualitative restriction. Of this volume, some 31,050 tonnes were produced. This increase is due to the additional flexibility granted during the year.

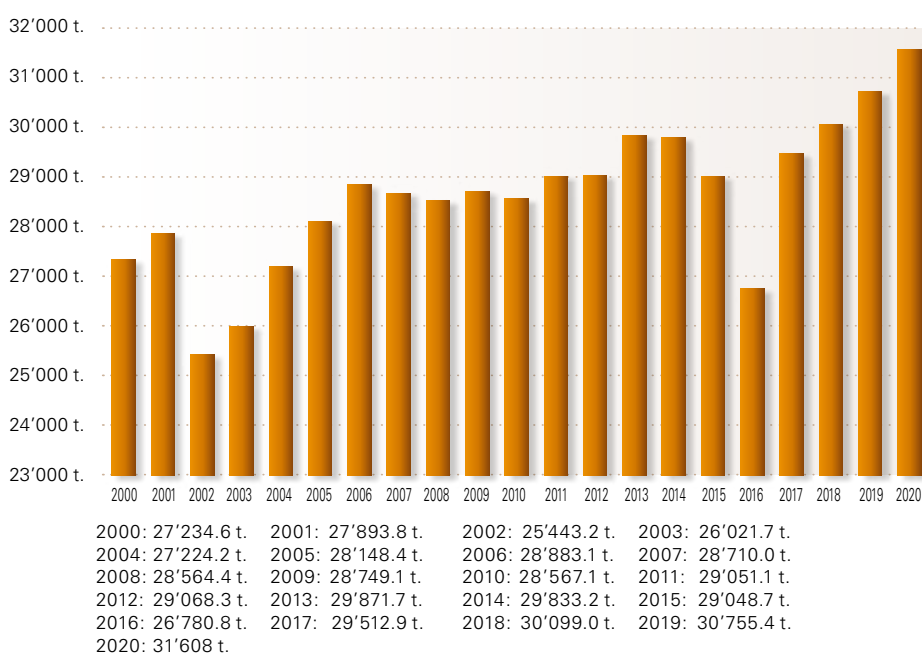
For the Gruyère d'Alpage AOP, the quantity put into production was 567 tonnes with a supplementary alpine pasture located in the Singine. The quantity actually produced was 562 tonnes. It should be noted that due to an early spring, the first weighing was much heavier than the second. We know that in the production of Gruyère d'Alpage AOP, we are much more dependent on the uncertainties of nature and the climate.

Knowing that production is struggling to keep up with market demand, Le Gruyère AOP Bio, was the subject of a more in-depth analysis. In the autumn of 2019, 170 additional tonnes were allocated for the year 2020 along with a new vat at the Sagnettes cheese dairy.

As a reminder, at the time of this decision, it was also decided that a quantity for 2022 be given to the Châtel-St-Denis cheese dairy. The quantity allocated for 'le Bio' in 2020 was 1,300 tonnes. The quantity actually produced was 1,330 tonnes.

The overall decrease in stock, due to the extraordinary consumption during 2020, made it possible during the autumn assembly in 2020 to already allocate the supplementary percentage which was intended to be given to the cheese dairies in 2022. Thus, the new basic quota is 101% in comparison to 2020. In addition, this same assembly gave a temporary extra 1%. At the beginning of 2021, a favourable business climate allowed for among other things a temporary increase of the traditional Gruyère AOP by 2% and that of Gruyère AOP Bio by 5%. For the latter market, a new analysis will be carried out for future developments. As far as the Gruyère d'Alpage AOP is concerned, for the year 2021, a temporary 3% has been given in cases where the quality conditions and the feed potential are respected. Overall, a reflection is being carried out to see on what basis the quantities can be improved over the next 10 years, i.e. for a campaign plan running from 2023 to 2032.

Total production 2000-2020 in tonnes





Market development

As previously mentioned, despite the pandemic and the price increase, Gruyère AOP consumption reached a new record in 2020 after that of 2019. This was the case not only in Switzerland, but also abroad with a global figure of 31,617 tonnes sold.

It is encouraging to note that in more complicated times, people in Switzerland and abroad turn to a trusted product, namely Le Gruyère AOP. Nationally, around 17,000 tonnes were purchased in the shops. Abroad, a new export record was set in the USA with 3,903 tonnes. In the European Union as a whole, 7,872 tonnes were exported, which corresponds to the 2nd highest figure since export statistics have been kept. The record for the European Union was set in 2014 with 8,063 tonnes. Nevertheless, sales figures were excellent in Germany, France, the Benelux countries and Great Britain, with a pleasing increase in volumes in the northern European markets, for which additional promotional efforts are being made.

As far as the organic Gruyère AOP is concerned, as we have seen with the evolution of the volumes produced and the level of stocks, its sale is following an ascending curve which could not have been foreseen two years ago.

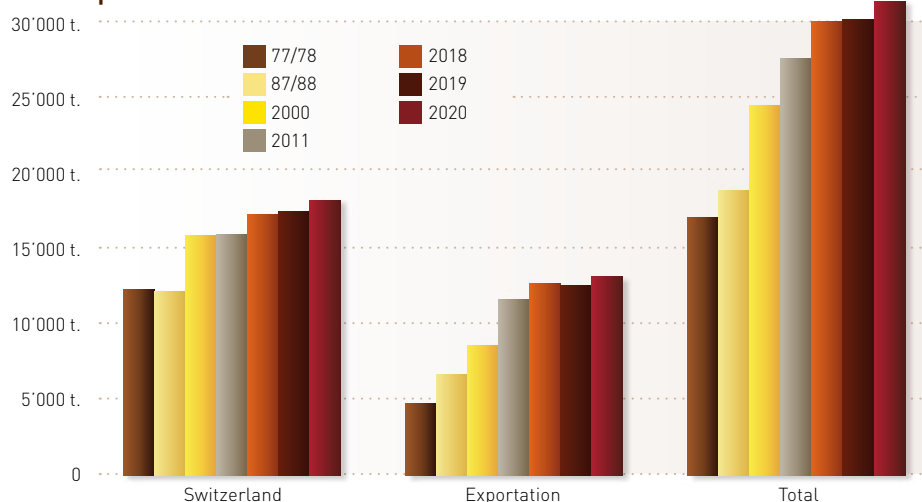
Thus, today, these two markets of traditional Gruyère AOP and Gruyère AOP Bio are in positive trends while avoiding a cannibalisation of volumes. This growing global demand has led to occasional increases in production in order to be able to supply all the markets with quality products where Gruyère AOP is present.

Consequently, the marketing efforts made in recent years, whether in-house promotion in Switzerland, in coordination with the Association for the AOP IGP or at an international level with Switzerland Cheese Marketing, are bearing fruit and reinforcing this activity. The latter is based on a clear line where the brand Le Gruyère AOP Switzerland is put forward. This marketing aspect, which is detailed in the special chapter of this report, shows that only an activity based on a well-developed strategy can lead to positive developments in the long term.

This market development does not detract from the efforts that must be made to ensure that the conditions and sales opportunities for Gruyère AOP are guaranteed in all regions of the world. Therefore, the Interprofession and others in the association are counting on the support of the various cantonal and national authorities to facilitate the sale and

export of the cheese, whatever the country of destination. This aspect is vital for the smooth development of sales. Furthermore, it is essential to be able to ensure that sales declared under the name Gruyère are in fact Gruyère AOP in the packaging. This is why we reiterate our request that the system of surveillance officers as provided for in the Savary motion be put in place quickly.

Comparison of sales in tonnes





The AOP dossier and **defence of the brand at an international level**

The defence of the name Gruyère at national and international levels is an important, even primordial task for the industry. At all times, consumers must know what they are buying under the name Gruyère. At this level, it is a question of respecting the work that producers, cheesemakers and affineurs carry out on a daily basis by respecting the guidelines of the Specifications controlled by the Organisme Intercantonal de Certification, OIC. This document clearly defines the traceability that allows the identification of each wheel of cheese produced. This means that we know exactly not just which cheese dairy is behind the wheel, but also which producer supplied the milk for its production, which is an important asset for the entire association. The Interprofession is grateful to each individual pre-packer who enables the pre-packaged product to be identified.

In order to strengthen consumer confidence, it is also essential that public controls confirm this important task. The Interprofession is calling for stronger coordination between the Cantonal and Federal control bodies, the Organismes de Certification (Certification Bodies) and the various collaborators of the Interprofession. In this respect, it asks for the rapid introduction of surveillance officers in the form of sworn personnel paid by the Interprofessions, capable of intervening in companies where fraud is suspected. This is in line with the Géraldine Savary motion. For example, one cannot sell more Gruyère AOP than one buys. These people are not in competition with the public control authorities but support them in the interest of the consumer and his/her health. This is how Article 182 of the Agriculture Act will finally be put into practice for the first time.

At both national and international levels, the Interprofession du Gruyère is doing its utmost to protect

the name Gruyère in all parts of the world. On several issues, it acts in concert with its French counterpart, the IGP Gruyère, as well as the French governmental body, the Institut National pour les Appellation 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 FOAG provides financial support for certain legal procedures to defend or register the trademark.

Every time the false use of the name Gruyère is observed, either on the market or at various fairs, legal action is taken to stop it. To date, many steps have been successful and one can assume that the usurped use of the name Gruyère is regressing throughout the world, which is a positive thing for the consumer here and elsewhere.

In its work to defend the name, the Interprofession du Gruyère can rely on the Organisation Internationale OrigIn, which defends the protection of geographical designations throughout the world, as well as the Swiss Association for the Protection of AOP-IGP. Switzerland Cheese Marketing (SCM) also plays an important role by reporting cases of misuse and by enforcing licensing agreements.

The Interprofession du Gruyère has intervened with the federal authorities to make them aware that when bilateral agreements are concluded, the protection of geographical designations and more particularly the name Gruyère must be regulated in the best possible way.

As with any company active on the international market, success in sales can only be based on clear and unambiguous protection of the name under which the product is sold, i.e. Gruyère AOP. This is the approach that was initiated in 1992 with the signing of the Gruyère Charter and confirmed by the award of the AOP on 6 July 2001.





Quality of Gruyère AOP

Assessment and controls

In accordance with the provisions of the product Specifications, each batch of Gruyère AOP is subject to appraisal once it reaches an average age of four and a half months. This is the basis for the seamless traceability linked to the casein mark. Each wheel of cheese is precisely controlled before being put on the market. An initial qualitative assessment is carried out at around 3 months when the maturer takes charge of the product after it leaves the cheese dairy's cellars. The assessment is carried out by a commission comprised of an appraisal officer from the Interprofession du Gruyère and a co-expert currently working as a cheesemaker. For the productions of November and December 2019 and July to November 2020 as well as the 2 assessments (13 and 14) of the alpine pastures, in order to respect the health restrictions due to Covid-19, no cheese expert was present. An appeal of the results can be filed, meaning there is a new examination by an Appeals Commission made up of two affineur representatives and a cheesemaker. Their verdict is then irrevocable. This procedure guarantees the objectivity necessary for the qualitative observation of Gruyère AOP sold on the market. Before leaving the cellars, the Gruyère AOP undergoes a final assessment by the affineur/vendor.

To the delight of consumers everywhere, this process gives Gruyère AOP and Gruyère d'Alpage AOP a flawless quality. This aspect is supported

by the Gruyère Interprofession through the payment of quality premiums, which have amounted to approximately 5.85 million Swiss francs. This support for quality is of great importance for everyone, whether it be the cheese dairies, the cheesemakers or the affineurs.

Taking a closer look at the annual production for 2020, the IB rate remained very low at 1.56%. This suggests that the rule of encouraging quality without requiring a consensus is bearing fruit. A total of 98.06% of the cheese wheels were classified as IA quality, while the proportion of 19 and over was 67%. Out of 33 appeals against the assessment, 16 won. For the production of Gruyère d'Alpage AOP, where climatic conditions play a more important role, quality is also in the balance, with proportionally a little more IB, which is understandable for this speciality. However, 94.87% was classified as IA with 65.8% of 19 points and more.

This excellence can be attributed to the professional work of each individual, from milk production, through cheese processing to maturing. This daily commitment is also encouraged by the various advisory bodies such as Caséi, Arqha and Agroscope. Training needs to continue as well so that future generations will always have the desire to be self-employed in the interest of quality and tradition to ensure the diversity of tastes.

With a view to preserving the authenticity of national specialities, the Interprofession du Gruyère is actively involved in the activities of Liebefeld Culture AG and welcomes the planned investments for the relocation of this facility as soon as possible to Posieux, Grangeneuve.



Chemical analysis

Moisture and fat content

Systematic controls are carried out on each batch with regard to chemical composition. Twenty-five analyses were the subject of appeals, 14 of which were won.

It should be noted that the controls cover more than 2,000 batches annually. Compliance with the levels stipulated in the Specifications is monitored over an average of six months. The objective assigned to these controls is generally met.

Specific analyses

The Interprofession carries out analyses related to the hygienic and bacteriological quality of the cheese. In 2020, the testing for the absence of pathogenic, phytosanitary and veterinary products continued. It was confirmed that the measures put in place ensure that the Gruyère AOP marketed complies with the relevant legal requirements. It is important for the consumer who buys

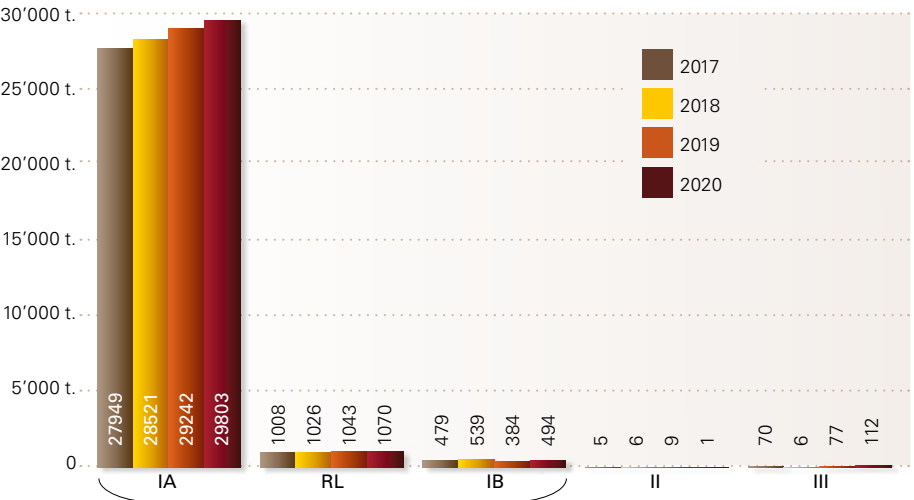
Gruyère AOP to know that they are purchasing a product without any additives, which is naturally lactose-free and gluten-free.

In this respect, the association would like to acknowledge the excellent cooperation which prevails with the various supervisory bodies, each within 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 at the disposal of the stakeholders in the association to find the best solution in the event of a recurring problem on a site. This way of functioning guarantees a healthy evolution of Gruyère AOP.

Comparison of quality by civil year in tonnes



Gives the right to the Gruyère AOP name



© Petter Backlund

Awards for Le Gruyère AOP

The Interprofession du Gruyère would like to congratulate all these award winners who demonstrate that the quality of Gruyère AOP is alive and well in decentralised cheese dairies for the benefit of the economic base of the Gruyère AOP area.

These awards reinforce the positive image of our hard cheese. They also remind us that the word quality is synonymous with respect for tradition, nature, know-how and rigour in everyday work. With these awards, the work of an entire industry is honoured.

The canton of Neuchâtel's cheese of excellence

The canton of Neuchâtel has also named its Gruyère AOP cheese of the year 2021. In a tasting session held for a jury composed of politicians, journalists, culinary experts and professionals, Gruyère AOP from Chézard-St Martin (Cernier) received the highest number of votes out of the ten Gruyère AOP cheeses nominated.



Danielle Rouiller - president of the dairy company, Daniel Maurer - cheesemaker

This noble cheese is made by Daniel Maurer, a long-time cheesemaker who was one of the founding members of the Interprofession du Gruyère in 1997. For several years now, he has been using new facilities, which enable him to process the milk from the Val de Ruz in excellent con-

ditions, both for traditional Gruyère AOP and for Gruyère AOP Bio. In fact, the Chézard cheese dairy was one of the first in the sector to opt for these two products. In this case, it was its traditional Gruyère AOP that won the title of Neuchâtel cheese of the year, but the organic cheese was also present on the tasting tray for the jury. Its production is marketed by the Milka AG maturing company in Burgdorf. The president of the dairy company, Danielle Rouiller, was also present at the event to represent all the milk producers who participated in this great success.

Cheese of excellence by the Fribourg State Council



Emmanuel & Loïc Piller - cheesemakers, Anne-Claude Demierre - President of the State Council

As the latest addition to the round of Gruyère AOP cheeses from the cantonal authorities, the Fribourg State Council has also designated its cheeses of the year 2021. The canton simultaneously selected its Gruyère AOP and its Vacherin Fribourgeois AOP in the spirit of the real Moitié-Moitié Fondue. Next year, Emmanuel Piller's Gruyère AOP from the Semsales cheese dairy will take its place on the official trays of receptions in the Canton of Fribourg.

Manu Piller has been operating the recently renovated Semsales site for many years. He is also one of the founding members of the IPG, having voted for the first statutes



at the 1997 Assembly of Delegates. This award is the result of rigour and collaboration with concerned and responsive milk producers, a cheese-making company that is committed to maintaining and renovating the facilities and a team of professionals in the processing industry. The Piller family's Gruyère AOP production is matured by Fromage Gruyère SA in Bulle for sale throughout Switzerland and its dairy company president is William Berthoud. The Vacherin Fribourgeois AOP of the year was awarded to the Montbovon cheese dairy, run by Marc Delacombaz, which also makes Gruyère AOP in the Intyamou valley.

Cheese of excellence by the Vaud State Council

For several years now, the Vaud government has decided, following the example of honouring its wines, to also designate a Gruyère AOP by the State Council. This year, it is the cheese maker from Grandcour, Mr Jean-Daniel Jäggi, who obtained this prestigious distinction. Despite the unusual conditions, it was still the State Council in its entirety that tasted the selection of the best Gruyère AOP cheeses of the year.

Jean-Daniel Jäggi has been a cheesemaker in Grandcour for many years. He runs a cheese dairy built in the early 2000s following the merger of the Grandcour, Chevroix and Delley cheese dairies. It is one of the lowland cheese dairies that contribute to the maintenance of milk producers in a region where large-scale farming plays a key role. The excellent quality of Mr. Jäggi's production has made the reputation of his establishment known far and wide; this, of course, is also thanks to the quality milk delivered daily by his producers in the Broye, where Gruyère AOP knows no borders and



Jean-Daniel Jäggi - cheesemaker

whose president of the dairy company is Mathias Mayor. The cheese from Grandcour is aged until it reaches full maturity in the natural cellars of Fromco in Moudon.



LE GRUYÈRE®
SWITZERLAND



Marketing

The importance of the marketing activities is often put into perspective when some other more significant event occurs. In the past year, that significant event arrived in the spring of 2020. The rapid spread of coronavirus slowed down a portion of the marketing and promotional activities planned for Gruyère AOP in the field. On the other hand, the good news is that our customers' desire to consume is still there and they have remained loyal to Le Gruyère AOP brand. Thus, the advertising promotion of the brand these past years had a positive impact on sales in 2020.

Is marketing really useful in times of crisis to promote Le Gruyère AOP? In any case, it remained essential in managing this situation. Indeed, communication is of course essential, but on its own, it is not sufficient enough to manage such an exceptional situation. Contacts with our clients and decision makers were not only maintained, but strengthened. Although we were going through a period of great uncertainty, it was not the moment to lose the connection with the consumers, otherwise all the efforts made before the period of Covid-19 risked being undermined.

Digitalization is one of the elements which offers the possibility of continuing to speak about Gruyère AOP to an audience. Therefore, our promotions were adapted through the creation of tutorials, online training and especially webinars.

The lockdown and the development of telecommuting are drastically changing habits. People have more time to consume content online. Many companies have decided to lower their digital commitments because they find it difficult to communicate or do not have the content to respond to such a particular context. Therefore, they prefer to limit their engagements. As a result, a place is opening up for Le Gruyère AOP. To take advantage of this opportunity, we are investing in everything that relates to the website, blogs, referrals and especially social media. It is important to understand that the time and money invested is sustainable and is in no case a loss to Le Gruyère AOP. It is an opportunity to be seized in the short-term to reap the benefits in the medium-term. In terms of the website, a new site was created in parallel with the launch of the new "Les Gestes" campaign.



This campaign deliberately focuses on members of the association, who are of course the best ambassadors of Gruyère AOP. In order to best position Le Gruyère AOP as a brand with added value, it is important for everyone at all levels to promote "Le Gruyère AOP Switzerland" brand by respecting the Guide to Good Marketing Practices, which defines each role; producer, cheesemaker, affineur, and the administration of the Interprofession.

What may have been taken for granted in our attitudes within the association towards consumption has certainly been challenged by this health crisis. At the same time, the Covid-19 global pandemic has changed our understanding of uncertainty because it is a truly global crisis, and it has deeper and more complex consequences and ramifications than any other crisis which today's marketing decision makers have ever seen or experienced. The Interprofessional du Gruyère's marketing team quickly considered the short, medium, and long-term consequences for our activities and the solutions

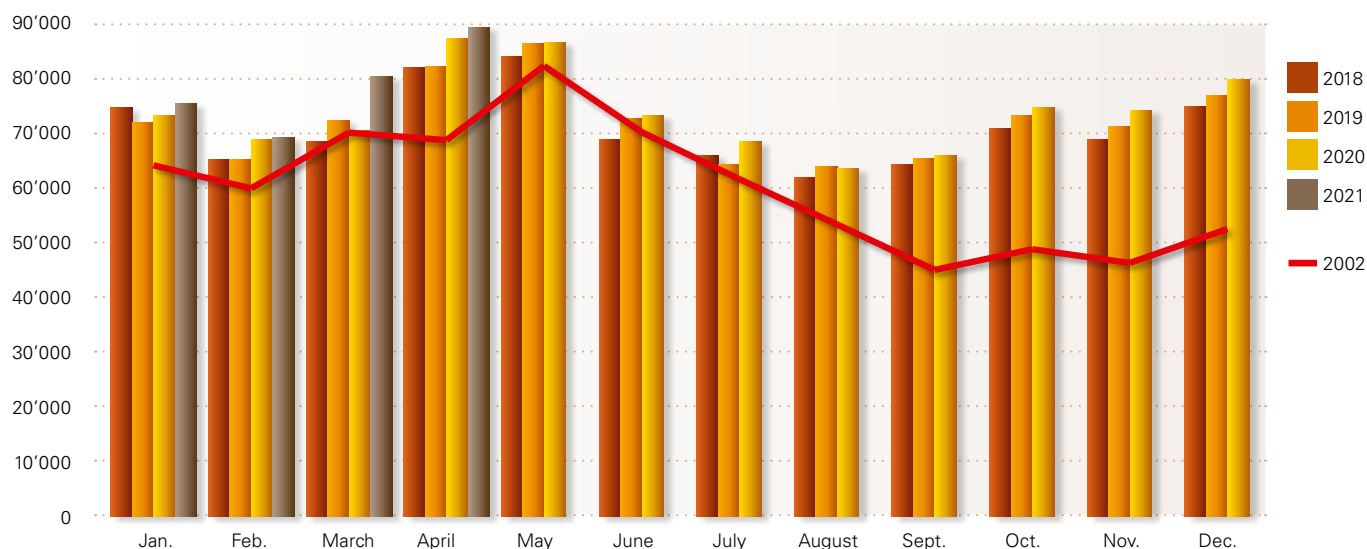
to be implemented rapidly by country in order to sustain Gruyère AOP sales.

On a national level, TV advertising was carried out across the various regions of Switzerland. Advertising for Le Gruyère AOP was released in the major Swiss cities on billboards, TV news programmes, weather forecasts, digital screens and also in cinemas where possible. The slogan "Le goût des Suisses depuis 1115" ("Born in Switzerland in 1115") was also broadcast on the radio.

The new advertising campaign, "Les Gestes", created in collaboration with the Numéro 10 agency in Bern, is intended to be educational, sincere and unique, like a return to the basics. It highlights real milk producers, cheesemakers, affineurs and appraisal officers. Authenticity is the key value of Gruyère AOP. Viewers were able to discover the 20-second version of the spot on national TV channels. Internet users targeted across top performing and popular sites were able to view the entire 50-second story. The advertising campaign was additionally

Comparison of production (casein markings)

Number of wheels



supported by insertions in the Swiss retail press. Le Gruyère AOP was present throughout the year in coordination with the association for the promotion of AOP-IGP and Switzerland Cheese Marketing (SCM). In order to encourage the recovery of the restaurant sector, Le Gruyère AOP joined the "Tous au resto" project. This novel support plan enticed the food lovers to return as soon as possible to the restaurants in the French-speaking region by offering an immediate 'cash back' in the form of a voucher to thank them for their solidarity. Le Gruyère AOP supported this project by distributing vouchers worth CHF 30.- to all restaurant owners in French-speaking Switzerland.

The Swiss Expo 2020 was held from the 15th to the 18th of January at Palexpo in Geneva and showcased the flavours of Gruyère AOP to a packed audience. The year was then marked by a series of cancellations of promotional fairs such as the MUBA, LUGA, BEA, Foire du Valais, OLMA, Slow food market, les Automnales, the Food Expo in Bern as well as the Salon des Goûts et Terroir in Bulle which normally offer those rare occasions to taste the various types of Gruyère AOP, Gruyère AOP Bio, and Gruyère d'Alpage AOP.

The collaboration between Zermatt and Gruyère AOP, which has been going on for 20 years, in conjunction with the 20th anniversary of the protection of Gruyère by the AOP, allows every visitor to use electric buses in the tourist area. Two electric bus lines in the brand's image serve Zermatt. This partnership is consolidated by an annual display in the colours of Gruyère AOP at the Täsch railway station, a compulsory stop for national and international visitors on their way to Zermatt.

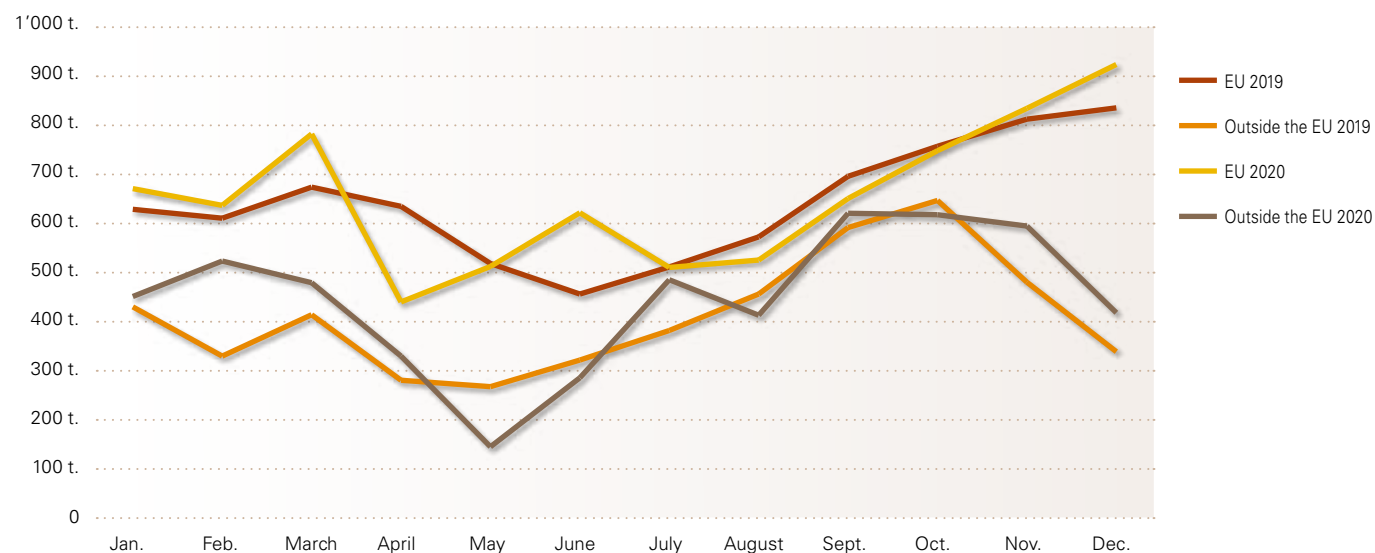
Gruyère AOP has joined in the promotion of the Fait Maison (homemade) label. The label, which includes the Maison du Gruyère restaurant, is open to all restaurants whose dishes are prepared entirely or predominantly in their own kitchens, without resorting to pre-cooked products or dishes.

Unfortunately, the activity "Discovering springtime with Gruyère AOP" initially scheduled for March 2020, had to be cancelled due to the first semi-lockdown in Switzerland linked to the coronavirus. The activity proposed the labelled restaurants to highlight dishes made with Gruyère AOP for a period of one week. To replace this event, 6 restaurants proposed new recipes with Gruyère AOP which were published on gruyere.com/recipes and on social networks. These delicious dishes were available in the selected restaurants throughout the winter period.

Le Gruyère AOP also supported German speaking high school graduates of 2019-2020 in the canton of Fribourg. The students were able to discover journalism through the Freiburger Nachrichten. As part of this activity, several articles were written about Le Gruyère AOP and its development. The students visited cheese dairies and reported their experiences in the pages of the Freiburg newspaper.

In view of the situation, and in an effort to support the cheesemakers in the association, each cheese dairy received a selection of promotional items and tools to encourage and support the sale of Gruyère AOP: PET bags, cheese knives, caps, recipe leaflets, colouring books for the youngest customers, price slates, aprons and shop entrance mats. Each apprentice in the sector also received a T-shirt and a cheesemaker's cap.

Exports 2019-2020 in tonnes



It is worth noting the joint initiative, carried out with the Vacherin Mont d'Or AOP, the Etivaz AOP and the Terravin wine quality stamp, supported by the State of Vaud. This collaboration makes it possible to present these traditional quality products in hotel schools and thereby introduce Le Gruyère AOP to students from all over the world. The specific AOP campaign and the consumers' home cooking resulted in an increase in consumption of 600 tonnes.

Internationally, the Interprofession continues to invest substantial resources abroad with the financial support of federal funds linked to its cooperation with Switzerland Cheese Marketing (SCM).

In France, despite a dire economic situation and two strict national lockdowns, one in spring and one in autumn, the exports of Gruyère AOP registered exactly the same volume as in 2019, with a total of 1,595 tonnes.

Traditionally held in Paris from 22nd February to 1st March, the Salon International d'Agriculture (Paris International Agricultural Show) opens the series of annual trade fairs in which the Interprofession du Gruyère participates. This year, for reasons we are all aware of, it was cut off as of the final Sunday. Le Gruyère was also showcased during the biennial edition of the Salon du Fromage.

In the context of the health crisis, a significant number of promotional and communication activities were put in place on the French market. More than 60 days of specific sales events were held both in mass distribution and through traditional channels. Despite the second lockdown in autumn, market activity allowed us to carry out specific advertising - POS (point of sale advertising) as

well as the distribution of Le Gruyère AOP tasting kits in more than 600 hypermarkets. Through the traditional network, Le Gruyère AOP was promoted in 130 cheese shops with discovery tasting samples distributed over a 4 week period.

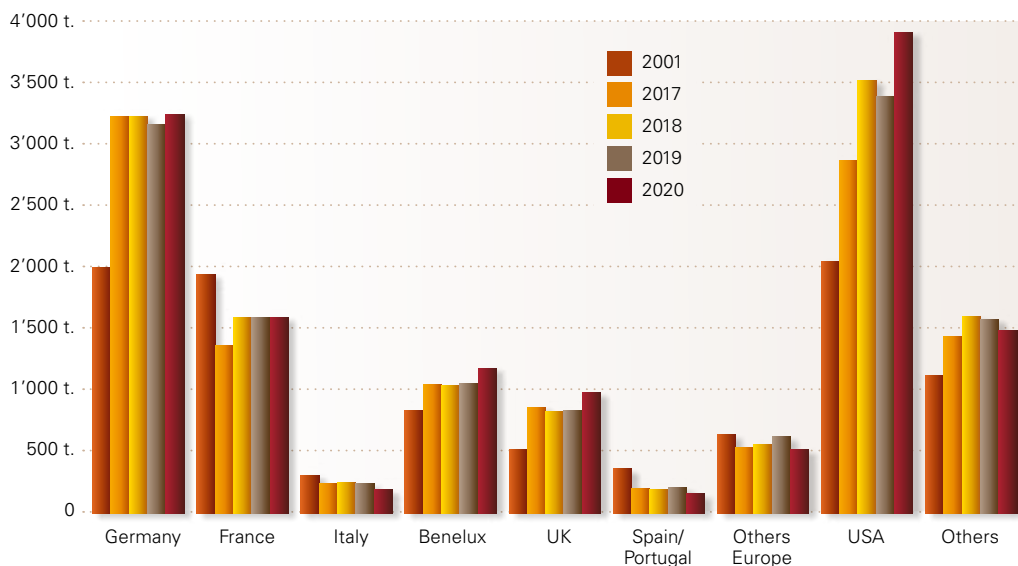
Through a major media plan for Le Gruyère AOP, combining traditional and digital media, communication activities were fully implemented at the end of the year. The poster campaign targeted at the point of purchase, such as in hypermarket car parks and shopping centres, generated 391 million contacts. In addition, a digital content campaign generated over 23 million contacts. And finally, a press advertising campaign totalled 35 million contacts.



Highlight 2020: An unprecedented measure to support French cheese retailers

Cheese shops are key promoters with whom the Interprofession du Gruyère acts directly. In order to thank them for their commitment, the Interprofession du Gruyère decided to send a "goodwill box" to 1,500 cheese retailers at the end of November, including a video card presenting two films on the production of Gruyère AOP, as well as a generous portion of Gruyère d'Alpage AOP; all accompanied by a letter co-signed by the Interprofession du Gruyère and Switzerland Cheese Marketing France. A major logistical operation between Switzerland and the Rungis MIN made it possible to manage this communication activity in a very short time, during the second period of confinement, with the creation of 1,500 parcels sent by name via the chronofresh service to the attention of cheese retailers throughout France. This unique "goodwill" activity was greatly appreciated by the shops during the pre-holiday period, and it was a first.

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)
Total 2020:	13'258	(EU 7'872)

In Germany, the food market was significantly affected by the health crisis. Although there were no closures of the custom cheese outlets, they lost an extremely high 12.2% of total cheese sales in 2020. In the fresh food retail and delicatessen sector, consumers focused more on supply purchases and less on taste experiences. In addition, consumers increasingly turned to pre-packaged cheese, which enabled the self-service area to achieve a significant increase of +9.1% in sales and +9.7% in turnover compared to the previous year. Money that could not be invested in travel or gastronomy, among other things, was spent on quality food. This trend was also reflected in the sales of Gruyère AOP. The year 2020 ended with significant import sales of Gruyère AOP with a total of 3,243 tonnes, making Germany the largest sales market for Gruyère AOP in Europe. Despite the unfavourable economic situation, this corresponds to a year-on-year sales increase of 2.6% for Gruyère AOP.

In the year 2020, the marketing strategy was continued on the basis of pull and push measures, all of which were successfully carried out, with the exception of the tastings, which could not be implemented. Gruyère AOP inspired consumers at Germany's largest consumer fair, Grüne Woche in Berlin. During the year, a new pre-packaging service for the counters was offered instead of tastings. The tasting activities usually carried out by our agency SCM Germany were adapted to the Corona period by cutting, packaging, labelling and ideally positioning Le Gruyère AOP at the various points of sale, in parallel with the promotional measures carried out in the field with more than 60 trade marketers, who on the one hand generated important purchasing impulses at the points of sale and on the other hand contributed to the positioning of the Le Gruyère AOP brand in the context of the advertising campaign.

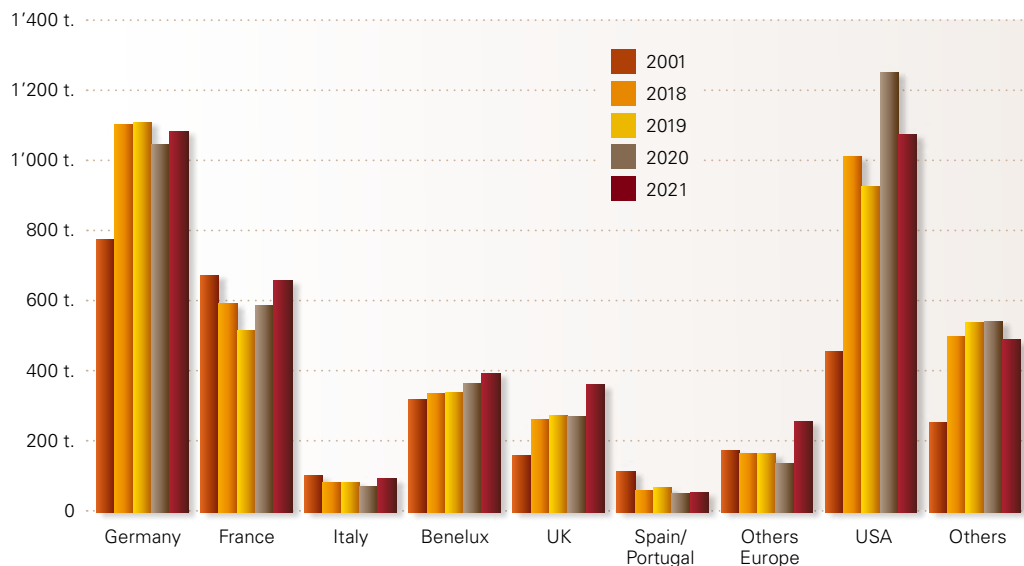


Highlight 2020: expansion of digital measures

Consumer media consumption also underwent a significant change in 2020. As elsewhere, the use of digital media has intensified in Germany. This development is aimed at a younger target group and involves collaborations with food publishers as well as the cooperation with a blogger who came to Switzerland in February. Digital contacts generated a total of 60.1 million views for the Gruyère AOP brand in Germany. The advertising campaign "Ein Stück vom Glück" (A piece of happiness) generated a total of 65.3 million contacts in the print media. These advertising measures yielded very good results: 91% of consumers surveyed remembered the advertisement and Le Gruyère AOP brand, 80% agreed that the advertisement conveyed the high quality of Le Gruyère AOP and 90% confirmed that the advertisement corresponded to the Le Gruyère AOP brand. Around three quarters of Gruyère AOP connoisseurs would buy the product on the basis of the advertising - this is 10% more than the previous year, which is an excellent result.

In Benelux, over the whole of 2020, Belgian GDP contracted by 6.2%. The cheese sector, which has had some difficulty in achieving volume growth in recent years in Belgium, nevertheless grew well in the year 2020. Overall, according to GFK figures, the cheese market as a whole gained 10% in volume. The fact that the cheese sector

Comparison of Gruyère AOP exports from January to April 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)
Total 2021:	4'465	(EU 2'903)



has grown so dramatically in 2020 is linked to the lockdown and closure of the Horeca sector. This situation led consumers to change their habits. They started to cook more for themselves, not just out of necessity, but also as a new pastime. Gruyère AOP, recognised as a culinary resource par excellence, was the taste of choice.

The marketing mix was adapted to the exceptional circumstances, with the aim of persuading new consumers of the merits of using Le Gruyère AOP. In the retail sector, field marketing enabled us to maintain our positions (regular promotions). Additional visibility in the self-service aisles was developed for Le Gruyère AOP, as close as possible to the point of purchase, complementing a major billboard campaign to raise awareness of the product. Le Gruyère AOP was also present on "native radio" on the theme of the Moitié-Moitié Fondue: columns entitled "A matter of taste" gave the floor to cheese shops in order to encourage as many consumers as possible to try a real Moitié-Moitié Fondue.

Highlight 2020: The story of a meeting between Gruyère AOP and tea.

The Interprofession du Gruyère and SCM Benelux are building a communication strategy for Gruyère AOP based on the transmission of values and taste. This communication strategy positions Le Gruyère AOP as a naturally premium product, very high on the taste scale. The book "Le Gruyère AOP et le thé, carnet d'une rencontre" (Le Gruyère AOP and tea, the story of a meeting), which combines two natural and healthy products on a little-explored path, was distributed at the end of the year.

In Great Britain, the uncertainties of Brexit have contributed to accentuating the country's productivity deficit. The Interprofession is continuing its work to position Gruyère AOP as the leading Swiss cheese, with the aim of making the product attractive to the end consumer and also to be present in supermarkets. The presence of Gruyère AOP is based on a selection of public and professional fairs, in order to reach consumers in a context quite different

from that of the points of sale and to boost the image of Gruyère AOP in the United Kingdom, including Scotland and Ireland, which we did at the beginning of the year before the deterioration of the health situation, which imposed an abrupt halt to all promotional activities on the British territory until the autumn. Gruyère AOP was presented to those concerned, in particular distribution professionals, through training and digital information as well as social networks.

Italy had a very difficult year (GDP: -9 points) and a health crisis affecting the purchasing power of households with a high rate of job losses and a critical effect on the overall economy. In the cheese market (+7.5%), Italian AOP fresh cheeses performed well, while foreign cheeses fell sharply (-11.6%). The price factor, the consumer's "buy local" attitude and the growth of the online grocery segment played an important role. There was a strong increase in pre-packaged products. Cash & Carry and hypermarkets collapsed: all very important factors which jeopardised the sales of Gruyère AOP. In-store activities were cancelled due to very limited access to points of sale, which reduced the relationship with consumers. The majority of the brand's activities were focused on improving the positioning of the Gruyère AOP image by placing 200,000 stickers in the aim of boosting sales. Two national promotions were carried out in order to reinforce the visibility of Gruyère AOP. This noble cheese was also active online, to support a presence in the e-commerce field and on the main social networks, with dedicated posts and content with the involvement of two famous influencers, generating over 140,000 views and 389,000 likes. Brand awareness is promoted during the year by digital communication, messages on Facebook and Instagram, the best media to communicate with an epicurean and gourmet target audience.

In Spain gross domestic product fell by 11% compared to the previous year. 2020 was also a difficult year for the Spanish market. The drop in tourism and the partial closure of the hotel industry affected our volumes of



Gruyère AOP. The recovery in purchases at the end of the year and the positive response from the food chain were not enough to recover the levels of 2019. The advertising campaign was rolled out on the Internet and on television as well as on social networks. Point of sale tastings took place until March 2020. A digital and television campaign focused on communicating the values which make Le Gruyère AOP unique was carried out from 15 October to 15 November. This was a digital campaign with displays in the Prisa publishing group and campaigns on social networks. The total results of the campaign were estimated at 3,790,000 contacts.

Despite the difficult situation, Le Gruyère AOP successfully took another step forward and achieved a new sales record in the **Nordic countries**. In addition to various print campaigns in all four countries (Sweden, Norway, Denmark and Finland), collaboration with food bloggers and brand ambassadors was intensified and our digital strategy was vigorously developed. Strict regulations in all Nordic countries made it difficult to have direct contact with customers at the point of sale and all trade fairs and events were cancelled. Le Gruyère AOP is establishing itself as a premium cheese in the North. The campaign developed for this purpose was awarded the coveted Swedish "Tidskriftspriset" in 2020. The media campaign is aimed at cheese consumers and passionate Gruyère AOP lovers who enjoy cooking. The main objective is to increase awareness and knowledge of Le Gruyère AOP. According to the Bonnier News survey, "the campaign was considered inspiring by 66% of respondents. 59% of those surveyed also said they buy Gruyère AOP, 53% plan to go to a specialised shop to do so and 42,000 internet users looked for additional information on our Nordic campaign website. The combination of traditional and digital media activities contributed most to this measurable success. Various video clips as well as ambassadors, helped to supplement the rather factual background stories about Gruyère AOP production with their creations and Instagram posts.

The United States, Americans love Le Gruyère AOP. Exports outside the European Union reached a record high last year with 3,661 tonnes to the USA. The United States is one of the world's leading cheese importers. Le Gruyère AOP is distinguished by its great diversity and is based on

the variety of American consumption patterns. Gruyère AOP can be an integral part of the meal, with the cheese platter arriving between the main course and dessert, or consumed at breakfast on bread or with the evening meal. The increase in the purchase of cheese throughout the United States is based on the spread of new consumption models. The first is that of Gruyère AOP as a cheese for melting and grating, the second as a snack component for sandwiches, salads and fast food. For several years, the United States has been the strategic development country for the Interprofession du Gruyère, with an increasing investment in promotional resources. Present with its own stand at the Fancy Food Show, one of the most important international trade fairs in the world, Le Gruyère AOP was seen during the January edition in San Francisco with a new stand bringing it together for the first time under the umbrella of Swiss cheeses with the Appenzeller brand. In order to increase consumption of the product in the USA, the most important export market for Gruyère AOP, the investment budget is in line with this key position and should enable the brand to be made more widely known and protected in the long term.

In 2020, the Interprofession du Gruyère continued to invest in different countries, that is to say **new markets or export initiatives**. The sales promotion provisions of the Law on Agriculture with specific activities are applied according to the co-financing rules published by the OFAG (Federal Office for Agriculture). As a result, Le Gruyère AOP carries out promotional activities aimed at supporting and increasing sales, while finding promotional solutions in agreement with the trading houses. These investments take place in countries which represent a potential of development for the sales of Gruyère AOP.

Canada represents a potential growth market for Gruyère AOP despite the quotas imposed. This is why promotional projects based mainly on a tasting plan are being carried out in supermarkets. The Interprofession du Gruyère has tested and implemented different digital campaigns in the territory. The aim is to develop and support the reputation of Gruyère AOP thanks to dynamic visuals which have an impact on the market during the end-of-year period.

Russia is hampered by numerous administrative and customs controls. In this complicated context, the Interprofession supports the trad-



ing houses in these steps because Le Gruyère AOP is considered a product appreciated by Russian consumers with high purchasing power. The brand was present at the Prodexpo trade fair, the largest food trade fair in Russia and Eastern Europe. The promotion of the brand was supported on site with a media plan combining conventional and digital press coverage.

Japan in terms of investments by the Interprofession du Gruyère is linked to the rapid economic development of the country, which represents a gateway to Asia. Overall, the Japanese favour specific references such as imported cheese, particularly Le Gruyère AOP. Japan is an importer of foodstuffs, as it buys most of its ever increasing food needs. Trading houses are also keen to develop this market. The Interprofession du Gruyère supports the promotion of the brand through communication and we continuously invest in print and digital media. The product is promoted through targeted tastings and it was planned to participate in the Tokyo 2020 Olympic Games through the partnership with Présence Suisse at the Maison Suisse.

Australia is a modern western market economy, offering its citizens one of the highest standards of living in the world. With 197 tonnes, Gruyère AOP is the leading Swiss cheese and demand is expected to grow in the coming years. Gruyère AOP is distributed through distributors who cover the supply to dairy and delicatessen shops. In order to fight against the presence of copies of indigenous generics, legal proceedings have been initiated to protect the brand. Gruyère AOP is continuously supported by promotional and communication activities. Media placement is coordinated with the Mediamix agency for the entire international market.

Sponsoring Le Gruyère AOP targets national and international sponsoring. The main objective of Le Gruyère AOP sponsorships today is to gain visibility. The brand was visible in cross-country skiing and athletics competitions. The Interprofession du Gruyère also collaborates with the European Athletics Association to participate in various competitions in Europe organised by this body. Additionally, Gruyère AOP supports curling competitions at national and European levels, as television broadcasts offer the brand an excellent promotional presence.

The Youth Olympic Games in Lausanne took place from 9th to 22nd January. Le Gruyère AOP was a partner of this event by supporting the cross-country skiing events in the Vallée de Joux and by offering a piece of Gruyère AOP to all the young athletes taking part as well as to the staff surrounding them. Le Gruyère AOP was also present at the setting up of the Olympic village in the Vortex complex with a fondue served to all the volunteers.

From 1st to 2nd February, the European Indoor Athletics Championships took place in Paris, where the athletes and Le Gruyère AOP shone with the numerous panels visible on site and through a television broadcast.

The rounds and finals of the Giant XTour, which travels the length and breadth of Switzerland for ski or snowboard

cross and freestyle competitions, were able to take place in Grimentz at the last minute, with the product being showcased.

The cross-country skiing World Cup events took place as usual at the beginning of the year, including the traditional Tour de ski. In March, health restrictions forced the FIS to cancel the competitions in Canada and the United States. The World Cup events were resumed in November, this time without spectators.

In February, Le Gruyère AOP was a partner in the new "SkiTour" concept created in the absence of major events such as the Olympic Games or the World Championships. The Ski Tour took place over a week between Sweden and Norway.

The Gruyère AOP Cheese Challenge offers the athletes on the podium a wedge of Gruyère AOP. Each athlete appreciates this gesture and they challenge each other to see who can build a whole wheel of Gruyère AOP. The 3 athletes who won the most wedges were offered a prize, including a trip to Gruyère for the grand winner Therese Johaug.

The brand supported the international meetings, Athletissima in Lausanne and Weltklasse in Zurich, as well as the Mille Gruyère competition for aspiring young athletes organised by the Swiss Athletics Federation. The 12 regional finals including 1 U-Turn of the Mille Gruyère youth project were organised despite the crisis. More than 3,000 children participated. The national finals took place on 26th September in Monthey in the presence of the public.

Le Gruyère AOP was present at the Swiss Indoor and Outdoor Athletics Championships, which were both able to be held.

Since 2020, Le Gruyère AOP has had a partnership with Athle.ch which is a very active platform for Swiss Athletics.

The traditional international athletics meeting Weltklasse Zürich could not take place in its normal form, so the organisers had to reinvent themselves to satisfy the athletics fans, in particular with two events that Le Gruyère AOP supported. In the One Million Run - 1 million kilometres in 48 hours: over the weekend of 30th and 31st May, everyone was able to run and contribute to reaching the one million kilometre mark while respecting the health regulations in force. The goal was reached with 1,124,737km for 80,727 participants. Inspiration Games took place on 9th July, the Zurich meeting innovated and organised distance duels that brought together 30 athletes in eight disciplines in seven stadiums around the world with the presence of the brand in the various stadiums.

Due to Covid, the Athletissima meeting did not take place in the Pontaise stadium as usual. The organisers set up two events sponsored by Le Gruyère AOP. The Coupe des Clubs, which gives a new impetus to athletics in French-speaking Switzerland in this period of crisis. Athletissima joined forces with Athle.ch, the Association romande



d'athlétisme and Swiss Athletics to launch a new competition format for clubs in French-speaking Switzerland. Each club participated in a "qualification meeting" between 8th June and 15th August. Ten disciplines were on the programme. For each discipline, the best result of the club's athletes counted for the final ranking. The 7 best clubs advanced to the finals, which took place on 30th August in the form of a meeting in Lausanne. Le City Event brought together the best pole vaulters in the world who met on 2nd September on the Place de l'Europe in Lausanne for an extraordinary competition with, as the icing on the cake, a frenzied public and a cheese tasting in the form of pre-packaged sticks of Gruyère AOP.

As part of the sports partnerships, Gruyère AOP is present in the form of banners, arches and flags in the surrounding area of the competitions and the athletes wear a bib in the colours of Gruyère AOP. The athletes on the podium receive a wedge of Gruyère AOP. When the organisers offer a buffet for the VIP guests, the tasting and discovery of the different types of cheese is emphasised.

During the past year, several events developed Covid-compatible versions, such as the BCN Tour or the Groupe E Tour with departures over several evenings and very spread out during which Le Gruyère AOP was visible.

Throughout the winter season, Le Gruyère AOP maintained its commitment to the HC Fribourg Gottéron team during the National Ice Hockey Championship. HC Gottéron opened its new ice rink to the public for the first 2 games of the season. Unfortunately, the rest of the season was played behind closed doors without being able to take advantage of this new arena which offers six restaurants where the moitié-moitié fondue is served.

To move towards a digital company, the Interprofession du Gruyère is banking on dialogue with its community via dynamic digital campaigns. In September 2020, the gruyere.com website

received a makeover. The old website was already a few years old and was no longer adapted to current uses, particularly for consultation on mobile phones and tablets. The new website has been redesigned in line with the campaign that was launched at the same time. It offers the user a much more pleasant and up-to-date reading experience. The website still contains the most important information about Gruyère AOP and its production. The cheese recipes are now available in a more readable and user-friendly layout. News and events can be consulted on mobile phones and tablets. Each cheese dairy listed on the site has its own list of milk producers.

New technologies require ultra-connectivity anywhere and anytime. The vast majority of customers consult the online image of Gruyère AOP before buying and using it. All these activities are supported by the gruyere.com website.

All the public relations actions that reinforce the sale of Gruyère AOP during the year could not be implemented for obvious reasons linked to the health situation. However, the Maison du Gruyère, the flagship showcase of Gruyère AOP, where the Interprofession's head office is located, attracted the attention of our public through numerous video conferences at an international level.

Any advertising is in vain if it is not based on a quality product. In this respect, the work of the entire industry is vital for the future success of our brand. It is thanks to its quality that consumers buy and enjoy Gruyère AOP and remain loyal to it. The challenge is to maintain this strategy in order to increase our international market share while maintaining the position of Gruyère AOP in our own country.



2020 Events

November 2019 to March 2020

Cross Country Skiing World Cup

28th December 2019 to 5th January 2020

Tour de Ski, Switzerland and Italy

9th to 22nd January 2020

Youth Olympic Games, Lausanne

15th to 18th January 2020

Swiss Expo, Geneva

17th to 26th January 2020

International Grüne Woche 2020, Berlin

19th to 21st January 2020

Winter Fancy Food Show, San Francisco

February to March 2020

Giant X Tour

1st to 2nd February 2020

European Indoor Athletics Championships, Paris

15th to 23rd February 2020

Ski Tour, Sweden and Norway

22nd February to 1st March 2020

International Agricultural Show (SIA), Paris

30th to 31st May 2020

One Million Run

8th June to 30th August 2020

Coupe des Clubs, French-speaking Switzerland

2nd September 2020

City Event Athletissima, Lausanne

11th to 12th September 2020

Swiss Athletics/Athletism Championship, Basel

23rd February to 2nd September 2020

Regional finals of the Mille Gruyère

15th June to 30th September 2020

BCN Tour Challenge, Neuchâtel

25th June to 31st December 2020

Tous au resto, French-speaking Switzerland

9th July 2020

Inspiration Games, Zürich

August 2020

Viens ça Vaud le coup, Vaud

12th August to 28th October 2020

Group E Tour Challenge, Fribourg

November 2020 to March 2021

Cross Country Skiing World Cup

December 2020 to March 2020

Kids Nordic Tour

Throughout the winter season

Fribourg Gottéron

Year-round

Advertising on all electric buses in Zermatt

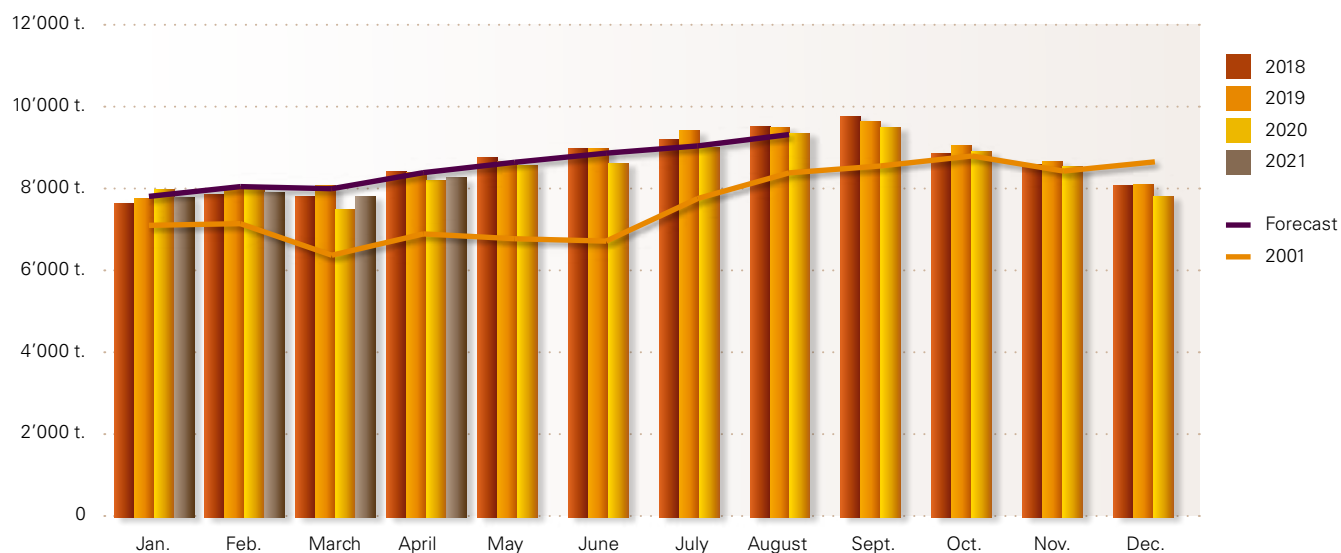


Governing Bodies within the Interprofession du Gruyère

The Interprofession du Gruyère Committee met 10 times last year, one of which was an out-of-the-country visit to the Salon de l'Agriculture and the Rungis marketing site in Paris. This was the last possible visit before the complete lockdown due to Covid-19. During the summer, some of the sessions were cancelled due to the difficulties of meeting linked to the global pandemic. Nevertheless, the committee's activities focused on quantity management and in particular on how to meet the growing market demand without destabilising the quantity management system. Additionally,

the committee tried to further develop the study conducted within the sector by the Triesse Gressrd Company. It was only at the beginning of 2021 that the various documents could be analysed in a group. As announced, they will be presented to the association in the second half of 2021. In addition to the work of the committee, a preparatory meeting on the market was held with the affineurs to study more specifically the market development and stock. This new and very important commission has met three times and will hold meetings in preparation for each committee in future years.

Comparison of stock evolution (end of April 2021) in tonnes





The Board of Directors held 6 meetings, the main focus of which was the analysis of the Triesse Gressard dossier. It is also in charge of preparing the evolution of the structure of the administration of the Interprofession with, as every year, a meeting concerning salary increases and the organisation within the Interprofession.

The Assembly of Delegates met once in person in July and once in the form of decisions by mail in the autumn due to the Covid problem. The main subject dealt with by the Assembly of Delegates was of course the statutory financial aspect, whether the ratification of the accounts or the decision on the budget for the year 2021. It was also decided to definitively accept a new affineur into the industry, the company Milka AG in Burgdorf. In line with this acceptance, the statutes were amended so that all Gruyère cheese affineurs are present at the Assembly of Delegates. Another important aspect of the delegates' meeting is the issue of quantities. At the autumn meeting, it was decided to give additional flexibility to the 3/9 system.

The various commissions met several times to approve the specific aspects related to them. The Alpage Commission held three meetings to analyse the quantitative and qualitative issues specific to Gruyère d'Alpage AOP. In the same vein, the Bio Commission held two meetings to analyse the short and medium-term prospects of the organic market.

In view of the development and analysis of the structure of the IPG and the problems of Covid, the Marketing Commission did not meet in 2020. Concrete proposals will be made in 2021 to develop the tasks and competences

of this committee so that it can hold meetings with clearly defined objectives.

The Quality Commission met once to analyse the development of the overall quality of Gruyère AOP, which, as we have seen, is very good or even excellent.

The Planning Commission met four times to study specific requests and also to analyse the development over the next ten years, taking into account various aspects. The aim is to observe the investments in the cheese dairies and also to analyse the potential of the milk available around the cheese dairies while guaranteeing full compliance with the requirements of the Specifications.

The overall structure of the Interprofession is led by Mr. Oswald Kessler, President.

The administration is led by Mr. Philippe Bardet, Director and Mr. Marc-Gendre, Vice-Director. The latter manages the quality sector, whose work is shared between Thierry Bize and Christophe Magne. This sector collaborates with the various bodies that support and encourage quality, namely Caséi and Arqha, as well as Agroscope.

The marketing department is coordinated by the Director with the presence of Catherine Merian, Anaïs Grandjean and Marie L'Homme as well as Philippe Gremaud and Denis Kaser. In view of the problems of Covid, the tasks as described in the specific marketing report have been somewhat modified, with many events being cancelled. On the other hand, the entire implementation of the new campaign as well as the reflection and implementation of new measures occupied this department.



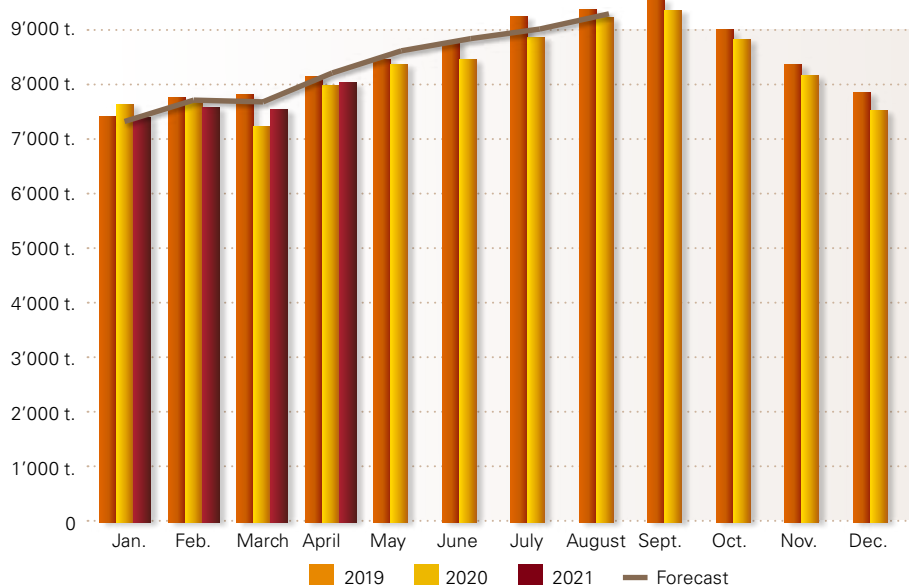
For the management of promotional material, the department relies on Mr Meinrad Gaillard. He is entering his last year of activity before a well-deserved retirement. Since 1 April 2021, he has been replaced in this position by Mr Jean-Claude Grandchamp.

The secretarial support is provided by Christine Grandjean and Julie Sudan.

The accounts are kept by Magali Vuichard and Sandy Uldry.

This motivated team has continued its tasks, trying to find the best possible approach in the context of a portion of its work being carried out at a distance, following the health restrictions imposed by the Confederation. Nevertheless, this team is enthusiastic about promoting, defending and encouraging the quality of Gruyère AOP throughout the year 2021.

Comparison of stock evolution excluding Alpage (end of April 2021) in tonnes





Committee members as of December 31, 2020

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 2021

In 2021, the governing bodies of the Interprofession will need to analyse the conclusions of the Triesse Gressard study while remaining attentive to the development of Gruyère AOP sales. This work will be carried out on the basis of the principles previously defined, which are:

Quantity

- Apply a management and planning tool (cockpit) in a spirit of transparency and trust with the aim of achieving qualitative growth. -> *The alert thresholds for inventory, production and sales are continuously checked in order to best respond to market variations.*
- Establish a 10-year campaign plan to meet market expectations.
- Strengthen 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 ensuring the installation of sworn surveillance officers within the Interprofessions.*

Quality

- Analyse the evolution of the distribution of fat and protein in milk to guarantee quality production of Gruyère AOP.
- Set up a monitoring system for the production development and installation techniques in relation to the quality of Gruyère AOP. -> *Collaboration with the research and advisory bodies Agroscope, Arqha and Casei has been established. Someone from administration will be dedicated to this task.*

Profitability

- Ensure the profitability of the association, its stakeholders and its administration. -> *An analysis of the distribution of the economic appreciation between the different groups will be carried out.*

Clients

- Analyse and define the image, history, strengths and characteristics of Gruyère AOP. -> *The issue of craftsmanship and sustainability should be analysed in each group and more specifically the difference between an AOP association and conventional production.*
- Analyse and define what we want to convey to the client and the consumer. This in-depth analysis can be based on a gratifying observation: during the Covid-19 crisis, *Le Gruyère AOP was considered a safe haven.*

Brand and Marketing

- Establish a clear brand and marketing strategy by objectively analysing the current situation. -> *This strategy will be based on the Guide to Good General and Marketing Practices and the product Specifications.*
- Strengthen the marketing structure of the IPG by redefining the objectives, tasks and responsibilities of those involved.
- Reinforce the communication concept based on a new advertising strategy for Switzerland and adapt it to the various markets abroad.

The future of the IPG

- Set up a risk analysis system for the IPG including the issue of pandemics (risk management).
- Promote and encourage the identification of members within the sector to which they belong. -> *Each member of the association promotes Le Gruyère AOP Switzerland brand.*

The Interprofession intends to fulfil these 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 Le Gruyère AOP per cheese dairy and per canton for 2021 (with turnover)

Canton	Villages			Bio			Villages + Bio		Alpages			All		
	Quantities (Kg)	(%)	Nbr	Quantities (Kg)	(%)	Nbr	Quantities (Kg)	(%)	Quantities (Kg)	(%)	Nbr	Quantities (Kg)	(%)	Nbr
FR	15'460'099	51.14	80	392'457	28.51	4	15'852'556	50.15	200'909	34.65	32	16'053'465	49.87	112
VD	8'528'728	28.21	37	371'080	26.96	3	8'899'808	28.16	358'101	61.76	22	9'257'909	28.76	60
NE	2'986'746	9.88	15	180'952	13.15	2	3'167'698	10.02				3'167'698	9.84	15
JU	720'117	2.38	3	165'080	11.99	1	885'197	2.80				885'197	2.75	3
JUBE + al.	904'782	2.99	5	106'769	7.76	1	1'011'551	3.20	20'859	3.60	3	1'032'410	3.21	8
BE	989'738	3.27	8	138'949	10.10	1	1'128'687	3.57				1'128'687	3.51	8
Other cantons	641'956	2.12	6	21'083	1.53	1	663'039	2.10				663'039	2.06	6
Total	30'232'166	100.00	154	1'376'370	100.00	13*	31'608'536	100.00	579'869	100.00	57	32'188'405	100.00	212

* 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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www.cheesesfromswitzerland.com

