

WP3

Comparison of local and global cheese, UK Dan Keech, James Kirwan, Damian Maye, Dilshaad Bundhoo

Introduction

- Local and global comparison of cheese production and consumption between the UK and Switzerland
4 cheeses under study: Cheddar, Single Gloucester, Gruyère, Etivaz

Common criteria of distinction between local and global cheese:

- Volume of cheese produced
Proportion of cheese exported
Network of milk suppliers
Number, range and distance of other input suppliers
Degree of industrialisation of production processes
Number of links in the supply chain
Nature of the information available to consumers
Number, range and geographical concentration of market outlets
Key distinction: Farmhouse versus Creamery

Research Objectives

- To examine supply chain arrangements for producers across the global-local continuum, including their geography, market concentration and upstream/downstream relations
To analyse key food chain performance issues identified from a production perspective (cheese making and dependant upstream supply chain), with key indicators
To identify consumer understandings of food chain performance in relation to cheese buying, including affordability issues, the role of information and communication and the importance of the provenance of the cheese they are buying
To examine consumer behaviours and practices in relation to cheese buying and cooking, including health and nutritional issues.

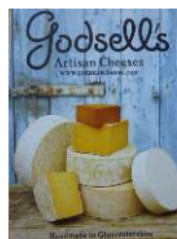
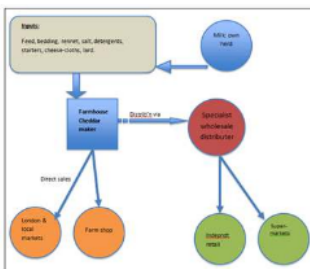
Method: Attributes and Indicators

Table with 4 columns: Attribute, Indicators, Stage relevance, Data source. Rows include Affordability, Creation and distribution of added value, Information and Communication, Consumer Behavior, Resource Use, Biodiversity, Nutrition, Animal Welfare, and Pollution.

Case studies: Cheese in the UK

The Local chain: Single Gloucester

- Highly localised cheese made by a total of six cheese-makers using artisanal and traditional processes
PDO scheme restricts production to county of Gloucestershire
Very small scale. Approx. 100T in total
About 40% direct sales
Minimal exports



The Global chain: Creamery-produced Cheddar

- Most produced cheese in the UK
55% of national cheese consumption is cheddar
About 25% of production is exported
A few very large producers, although there are many small-scale (farmhouse) cheddar producers as well
In terms of quantity, most cheddar is produced at a creamery/industrial scale

The UK's best-selling creamery-produced cheddar



Data collection

- Interviews: face-to-face semi-structured interviews to be conducted with a number of both local- and global-scale cheese-makers, as well as milk producers, retailers and wholesalers
Focus Groups: a series of four focus groups to be conducted with both urban and rural residents, each to contain 8 participants
Workshop: once the interviews (above) have been conducted, and the results analysed, a workshop to be conducted with key stakeholders in the cheese supply chain
Secondary data: national and regional statistics as well as scientific studies will be utilised to complement the primary data collected

State of research

- Desk review of UK cheese supply chain completed (secondary data)
Five face-to-face interviews have been conducted with local chain actors. In each case those involved produce all their own milk
Interviews with retailers have been arranged for November
Interviews have been conducted with key cheese supply chain actors
Global chain actors have been contacted for interview
Four focus groups have been conducted with consumers: two with urban residents (8 per FG) and two with rural residents (8 per FG)
Reciprocal visits between the UK and CH have been realised