

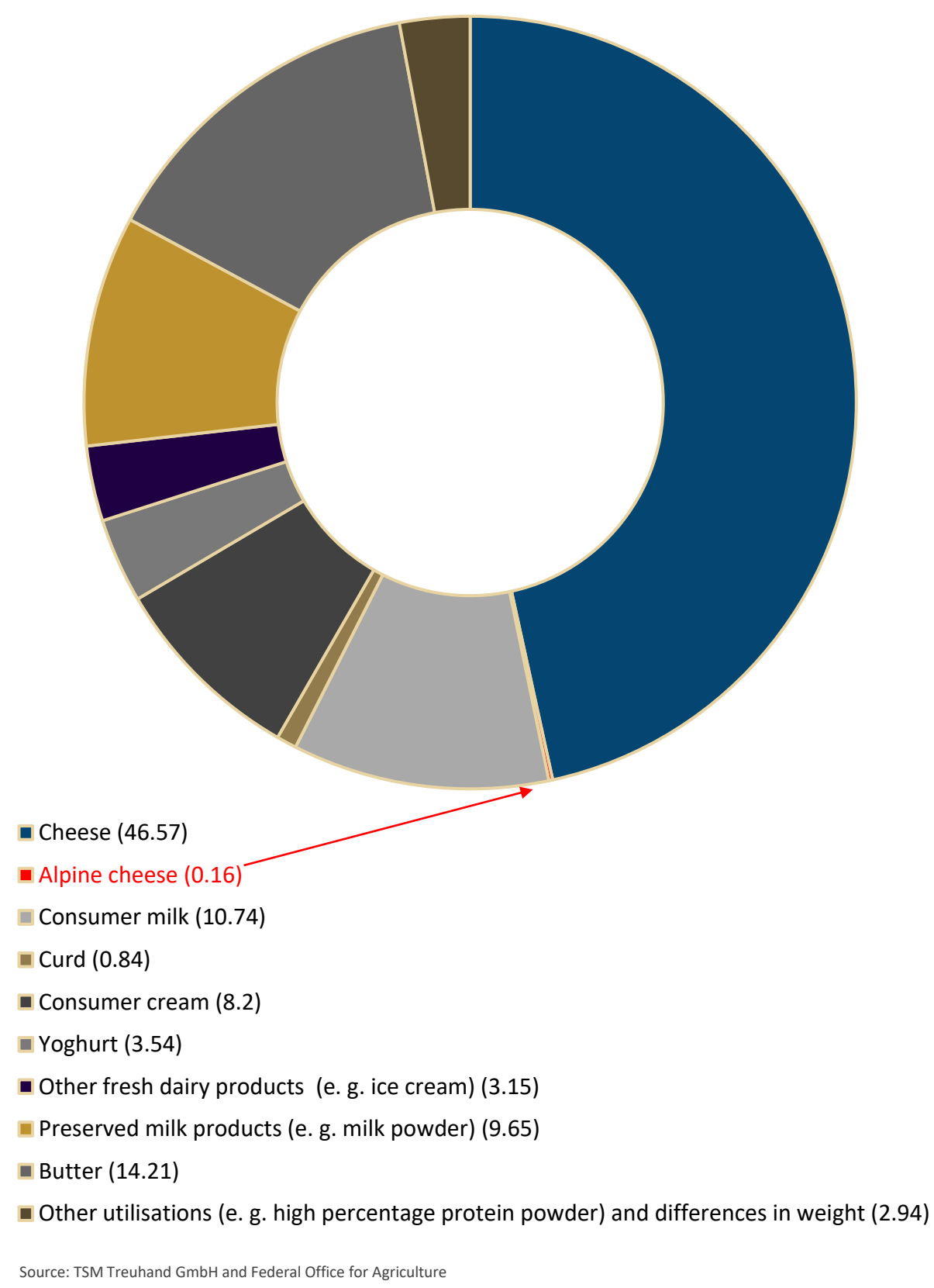
SUMMER GRAZING AND THE PRODUCTION OF ALPINE CHEESE IN SWITZERLAND

MILK MARKET

The most important utilisation of Swiss milk is cheese production. In 2021, **46.7 per cent (1'591'397 tons) of the marketed milk** was used for cheese production. Compared to the previous year, this figure increased by **1,7 per cent**.

Utilisation of milk in 2021 in %

Total: 3'405'139 tons of milk



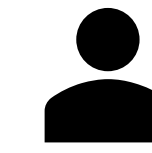
KEY FIGURES ON ALPINE FARMING

- > **5'500 tons** of alpine cheese per year
- > **6'700** alpine farms
- > **15'000** alpine farmers
- > **300'000** summered animals (number corresponds to a standardised livestock unit)
- > **171 million Swiss Francs** of direct payments for the summer grazing area
- > **1/3** of the agricultural land

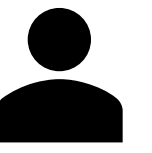
Year: 2021. Rounded.

CONSUMPTION OF ALPINE CHEESE

Consumption per capita 2021



23.2 kilograms
cheese in total



625 grams
alpine cheese

Source: Milchstatistik 2022, TSM Treuhand GmbH and own calculations

SALES OF ALPINE CHEESE

> More than half of the alpine cheese is **sold directly** – for example in farm shops or via online shops. An overview can be found as follows (only in German):



> The exact number of alpine cheese sold in the **retail business** is unknown. Estimates suggest a share of less than forty per cent.

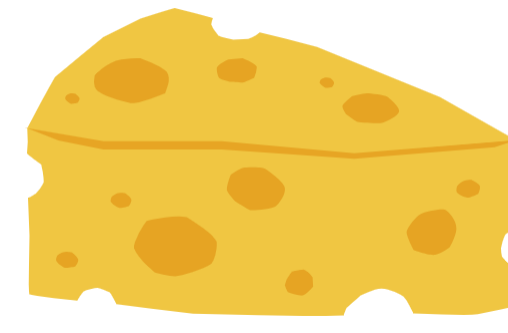
Source: www.swissmilk.ch and www.bauernzeitung.ch

PRODUCTION OF ALPINE CHEESE

Share of alpine cheese in cheese production 2021

SOFT CHEESE:
0.5% ALPINE CHEESE
(30 tons)

HARD CHEESE:
3.9% ALPINE CHEESE
(2474 tons)



FRESH CHEESE:
0.06% ALPINE CHEESE
(35 tons)

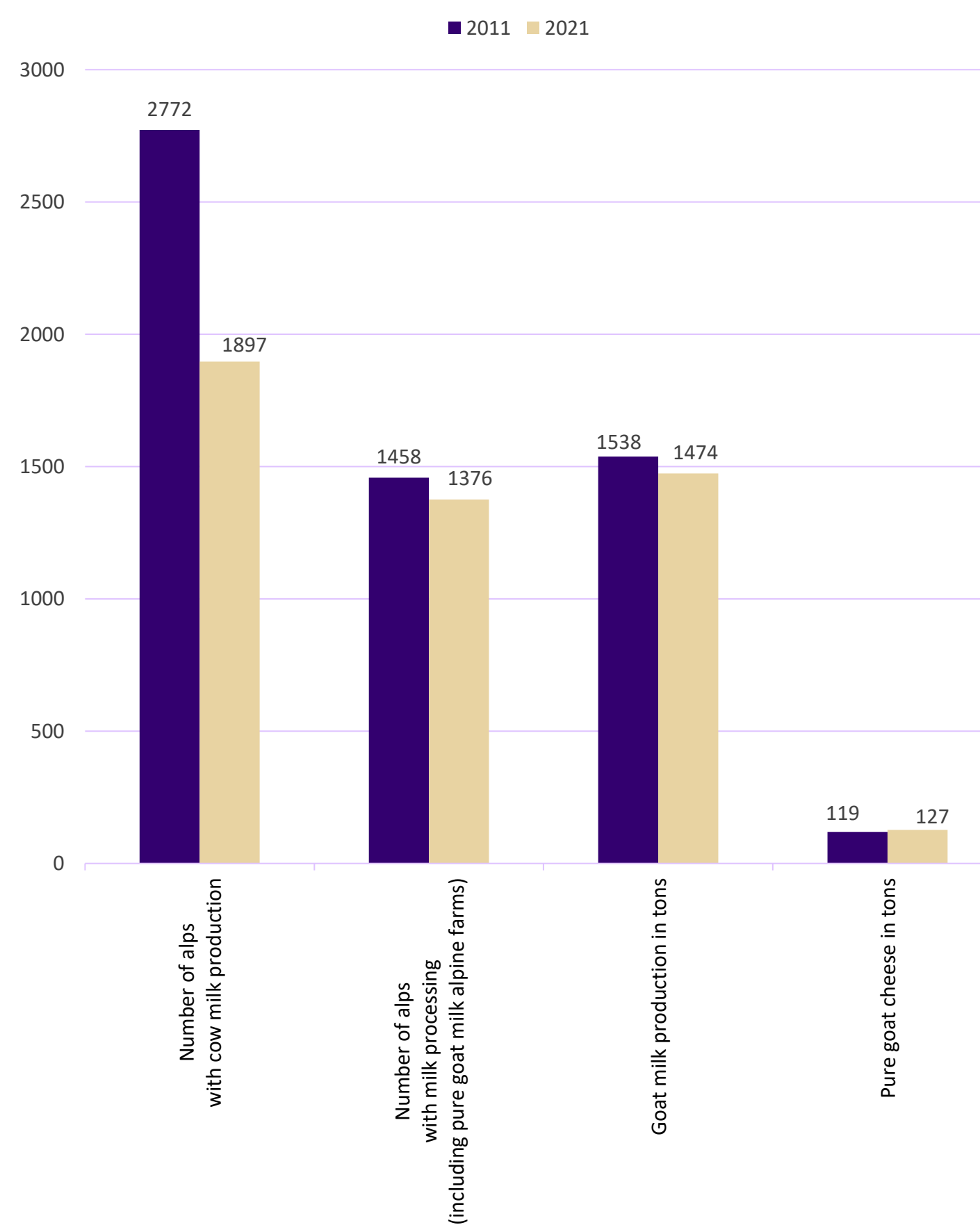
SEMI-HARD CHEESE:
4.5% ALPINE CHEESE
(3144 tons)

Source: Milchstatistik 2022 and TSM Treuhand GmbH

≈ 4 %

the share of alpine cheese in total Swiss cheese production

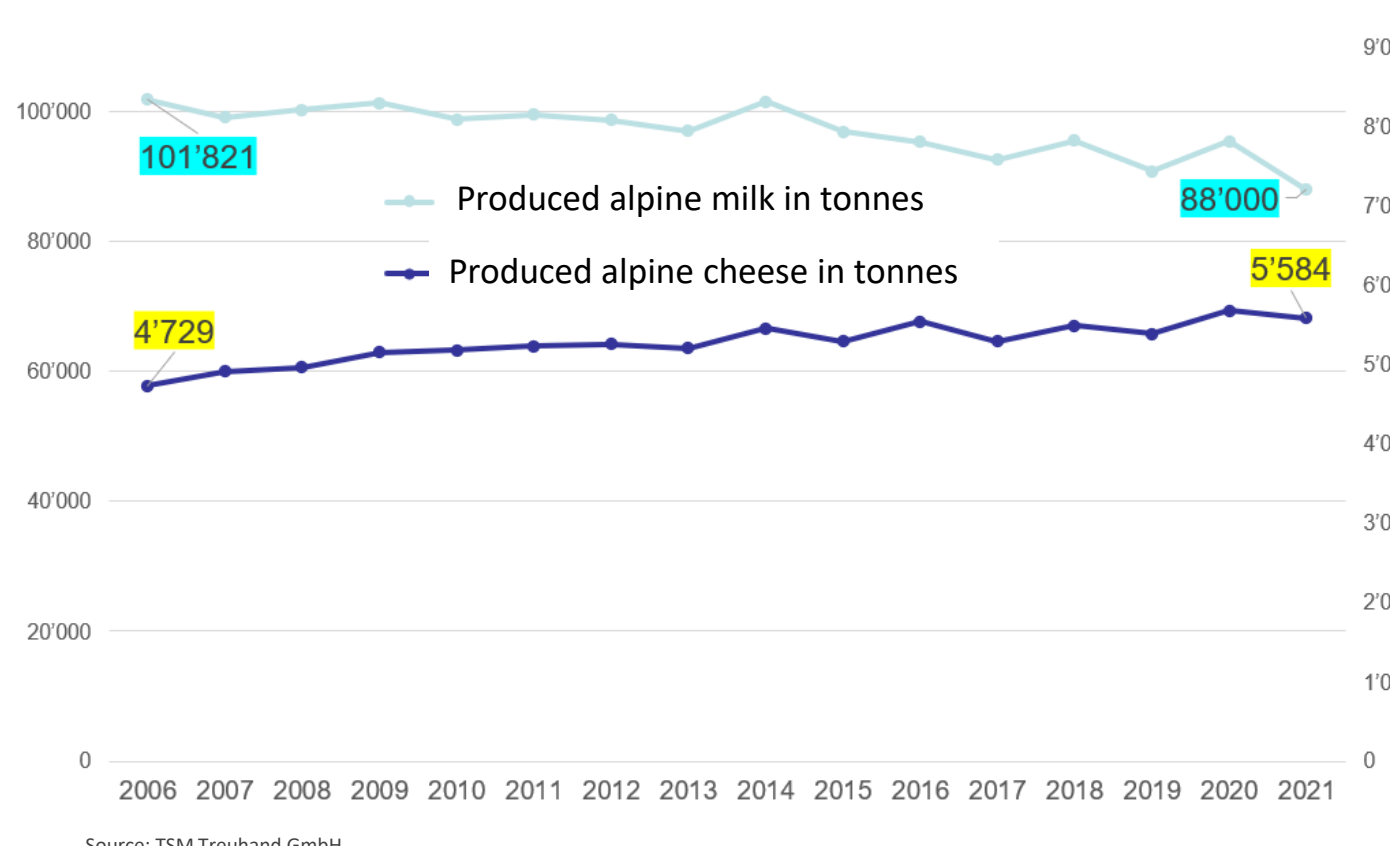
Alpine dairies with milk processing and goat milk production



ALPINE MILK MARKET

Even though the production of **alpine milk** has **decreased by around 14%** between the years 2006 and 2021, the production of **alpine cheese** has **increased by around 18%**.

Utilisation of alpine milk 2006 - 2021



OTHER ALPINE DAIRY PRODUCTS

Utilisation of alpine milk in 2022

Product	Quantity in tons
Hydrated butter	168.123
Yoghurt	131.238
Consumer cream	5.247
Consumer milk	5.038
Specialty products	141.51
Dairy drinks	1.325
Dehydrated butter	1.253

Source: TSM Treuhand GmbH

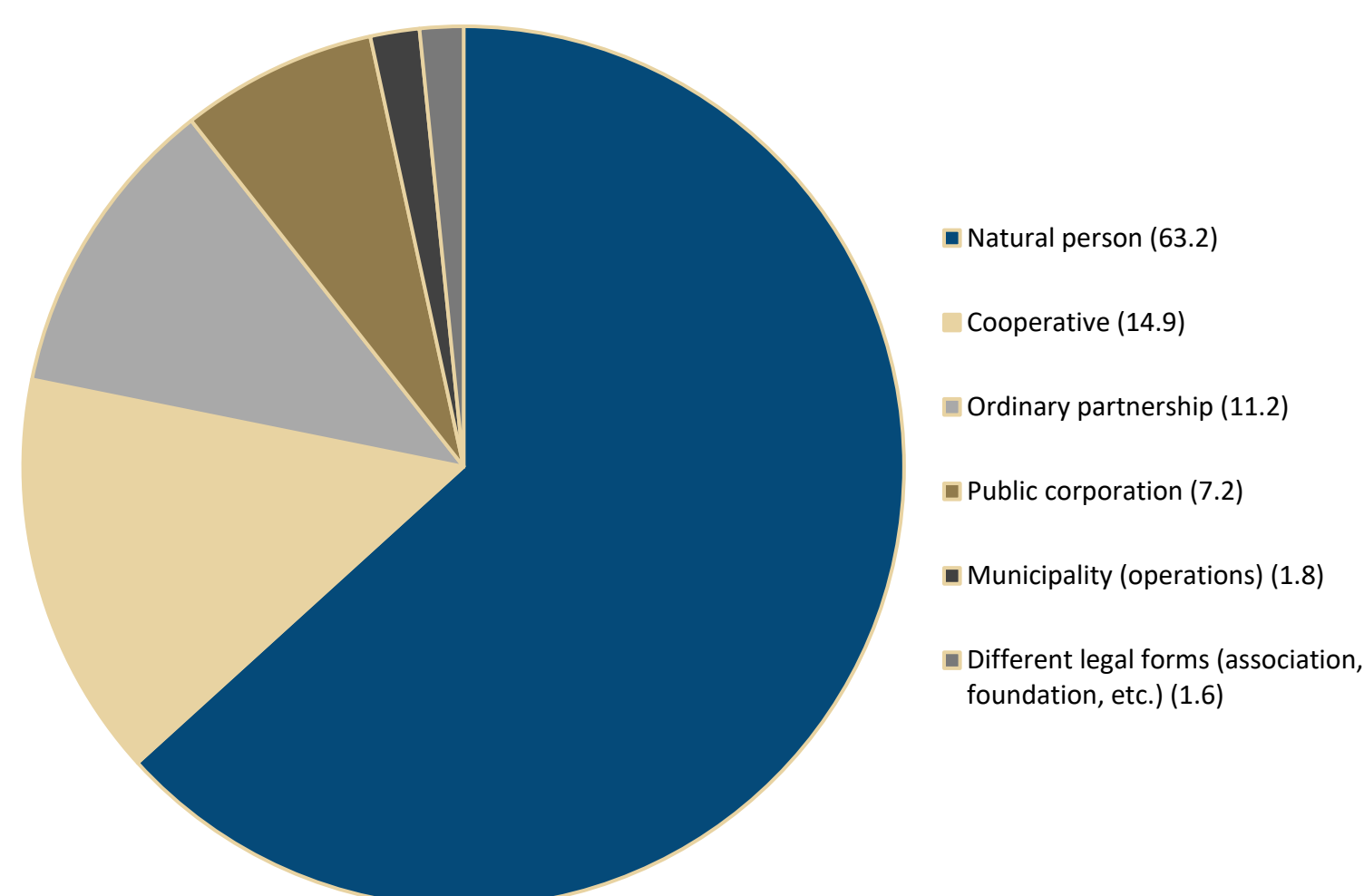


SUMMER GRAZING AND THE PRODUCTION OF ALPINE CHEESE IN SWITZERLAND

CORPORATE STRUCTURES

OPERATING CONDITIONS

Legal forms of the alpine farms in 2021 in %



> **Natural persons and ordinary partnerships** are also common in year-round operations.

> **Cooperatives and public corporations** are only found in alpine farms.

> These legal forms have their roots in **tradition and economic efficiency**.

> Often **certain forms are predominant in a region**. However, it is never the case that only one form is present.

Source: Federal Office for Agriculture and www.wsl.ch

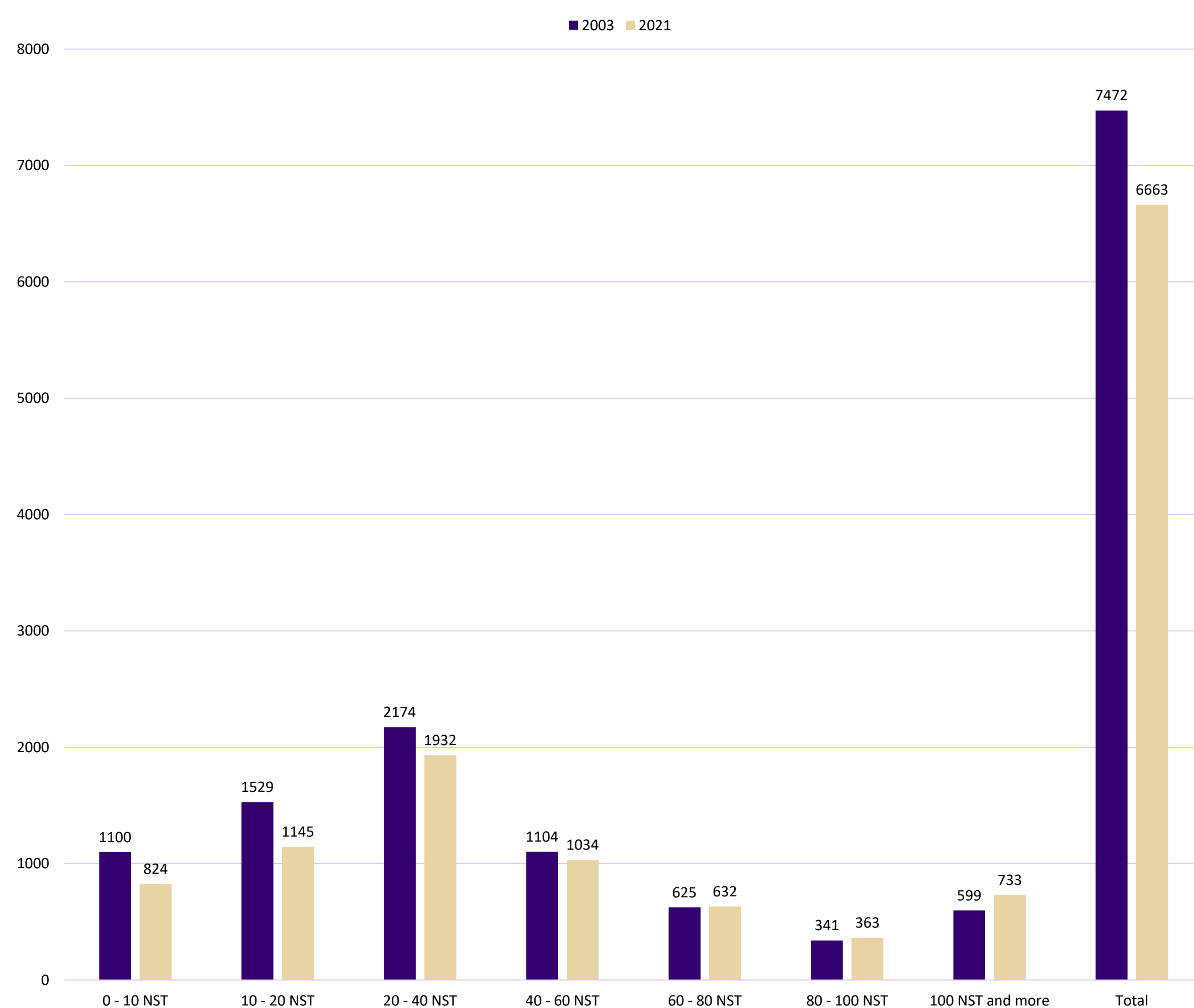
SIZE OF THE ALPINE FARMS

> The size of an alpine farm is measured in *Normalstössen* (NST). One NST corresponds to the summer grazing of one livestock unit that eats roughage for 100 days. Put simply, **one NST corresponds to the amount of grass needed to feed a cow for 100 days**.

> The **normal stocking rate** – converted into NST – is determined by the cantons for each alpine farm.

> The **number of alpine farms has decreased** over the last 20 years. Since farms have merged or been taken over by a neighbouring farm, alpine farms have **tended to become larger**.

Number of alpine farms



Source: Federal Office for Agriculture

SUMMER GRAZING AREA

11 %
of Swiss territory

1/3
of the agricultural land

4655
square kilometres

> The summer grazing area is **less productive** than the agricultural land from an agricultural perspective.

> Nevertheless, this area, which is only used in summertime, covers about **ten percent of the feed requirements** of domestic livestock.

> Studies on biodiversity in summer grazing areas show an **importance for biodiversity** in Switzerland that goes much further.

Source: agrarforschungschweiz.ch



DIRECT PAYMENTS

> In 2021, the Swiss Confederation paid out a total of around **2.8 billion Swiss Francs** in direct payments for agriculture.

> The **direct payments for the summer grazing area** (171 million Swiss Francs) correspond to around **6.1%** of the total direct payments.

Source: Federal Office for Agriculture



Schweizerischer Alpwirtschaftlicher Verband
Soci t  suisse d' conomie alpestre
Societ  svizzera di economia alpestre

- > is the **national organisation** of alpine farming
- > **represents the interests** of its members with the authorities, organisations and specialist bodies in politics and society
- > promotes **networking, exchange, information and knowledge transfer** nationally and internationally
- > supports alpine farms, e.g. to **increase their net product**