

*WP T2 – IDENTIFICATION OF BEST PRACTICES  
IN THE COLLECTIVE COMMERCIAL VALORISATION  
OF ALPINE FOOD INTANGIBLE CULTURAL HERITAGE*

WP leader: Kedge Business School

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**Field Study of Relevant Cases of  
Success: Association of Traditional  
Cheeses of the Savoyard Alps  
(AFTALP)**

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## Abstract

Founded in 1997, AFTALP is a second-level promotional association that regroups the trade organizations responsible for the promotion of the eight Savoyard cheeses protected by geographical indications (PDOs and PGIs): Abondance PDO, Beaufort PDO, Chevrotin PDO, Emmental de Savoie PGI, Raclette de Savoie PGI, Reblochon PDO, Tome des Bauges PDO, and Tomme de Savoie PGI. Specifically, AFTALP promotes these traditional Savoyard cheeses by valorising the common elements at the base of their quality: the links to the natural and cultural landscape, the indigenous cow and goat breeds, and the traditional cheese-making practices. By fostering the engagement of different local actors and communities, the association encourages a collective and collaborative marketing approach that helps to preserve and safeguard the traditional Savoyard cheese heritage. In addition, thanks to its two main promotional activities – the Route of Savoyard Cheeses and the Festival of Savoyard Cheeses - the association improves the tourist attractiveness of the Department of Savoie and Haute Savoie and supports local business activities.

Depuis 1997, l'Association des Fromages Traditionnels des Alps Savoyardes (AFTALP) regroupe les acteurs et les syndicats interprofessionnels des filières des huit fromages de Savoie certifiés par des Appellation d'Origine Protégées (AOP) ou Indications Géographiques Protégées (IGP): Abondance AOP, Beaufort AOP, Chevrotin AOP, Emmental de Savoie IGP, Raclette de Savoie IGP, Reblochon AOP, Tome des Bauges AOP, et Tomme de Savoie IGT. Plus précisément, l'AFTALP réalise des actions de communications qui valorisent les éléments communs à la base de la qualité des fromages savoyardes traditionnels en valorisant les éléments communs à la base de leur qualité: les liens au paysage naturel et culturel, les races autochtones de vaches et chèvres, et les pratiques fromagères traditionnelles. En favorisant l'engagement des différents acteurs et communautés locales, l'association encourage une approche marketing collective et collaborative qui contribue à préserver et sauvegarder la culture traditionnelle fromagère savoyarde. En outre, grâce aux ses deux activités de promotion principales - la Route des Fromages de Savoie et la Fête des Fromages de Savoie - l'Association améliore l'attractivité touristique des Départements de Savoie e d'Haute-Savoie et soutient les activités commerciales locales.



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## 1. Introduction

Based in Thônes, a small village in the Department of Savoie, the Association of Traditional Cheeses of the Savoyard Alps (AFTALP) was founded in 1997 to facilitate the collaboration among the players in the supply chains of the eight Savoyard cheeses protected by the Protected Designation of Origin (PDO) or Protected Geographical Indication (PGI) geographical indications: Abondance PDO, Beaufort PDO, Chevrotin PDO, Emmental de Savoie PGI, Reblochon PDO, Tome des Bauges PDO, Tomme de Savoie PGI, and Raclette de Savoie PGI. Each of these cheeses is safeguarded by an individual *interprofession* – an inter-professional trade association grouping producers and professionals in the respective supply chains. AFTALP is a second-level promotional association created to give a common voice to the traditional Savoyard cheeses in regulatory affairs and to engage in collaborative promotional activities that complement those realized by the individual cheeses' geographical indication associations. By pooling financial resources from the participating associations, AFTALP can engage in promotional activities at a scale that the individual *interprofessions* could not afford. These include advertising on traditional and social media, the organization of festivals at participation at trade fairs in France and abroad, and the organization of an experiential diffused attraction, the Route des Fromages de Savoie (the Route of Savoyard Cheeses). In addition, AFTALPS represents the interests of traditional Savoyard cheeses to local councillors, policy makers, and economic stakeholders.

## 2. Methodological procedures

The AFTALP field case is based on various data sources collected in 2017 and 2018, including: one long interview carried out by Prof. Diego Rinallo (2h25' of records) with the association's communication manager; 9 internal documents provided by the informant (84 pages in total); twelve articles from the news and trade press. Additionally, the association's Facebook page and website were monitored and analysed. Further data was obtained from the websites of each of the *interprofessions* of the traditional Savoyard cheeses.

## 3. Member organizations and partners

The key actors involved in AFTALP are the interprofessional trade associations of traditional Savoyard cheeses responsible for the safeguarding and management of their respective PDO/PGI geographical indications. Each of these associations brings together the milk producers, individual and cooperative cheesemakers, ripeners and other operators involved in the production of their respective cheeses.

**Reblochon** is a soft washed-rind and smear-ripened Savoyard cheese made from raw milk from the Tarine, Montbéliarde and Abondance cow breeds. It is the oldest Savoyard cheese to have obtained the PDO indication, which dates back to 1958. Constituted at that time, the *Syndicat Interprofessionnel du Reblochon* today regroups 520 milk producers, 19 cooperative dairies (called *fruitières*, which produce *Reblochon laitier*), 130 farmers (who produce *Reblochon fermier*), and 11 ripeners (who buy and age *Reblochon laitier*, whereas *Reblochon laitier* is typically directly aged by *fruitières*). The PDO product specification allows in fact two different varieties of Reblochon, which correspond to specific production processes and producer typology, identifiable through the colour

(green or red) of their casein pellet. The farm-produced *Reblochon fermier* is recognisable by its green pellet, and the *Reblochon fermier* indication on its packaging. It is always produced on the farm from a single milk source (the farmer's herd) and artisanally. The dairy-produced *Reblochon laitier*, recognisable by its red pellet, is made from milk from different producers. The milk is collected from different cow breeders and processed at the *fruitière*, where the milk is blended and processed into *Reblochon* once a day, within 24 hours of milking. In both cases, the casein pellet guarantees the origin of the *Reblochon* and its traceability. It also includes the manufacturing workshop number and the manufacturing batch identifiable through the control date of manufacture.

**Beaufort** is a firm cheese associated to the Gruyère family produced in the Beaufortain, Tarentaise and Maurienne from raw milk from the Tarine and Abondance cow breeds. Already in 1968, the second among Savoyard cheeses, it obtained the PDO geographical indication. The product specification allows for three varieties of Beaufort: Beaufort (produced in valleys in November-May, when cows are fed with hay); Beaufort *d'Été* (summer Beaufort, produced during the summer months with milk from cows in high-mountain pastures); and Beaufort *Chalet d'Alpage* (produced by individual farmers directly in high-mountain pastures). The Beaufort supply chain comprises of 600 milk producers, one milk buyer, 8 cooperative cheesemakers, 2 ripeners, 7 breeder consortia (*groupements pastoraux*, a collective high-mountain pastures management system), and 18 individual cheesemakers. Two collective actors, with different institutional goals, represent these individual organizations. The *Union des Producteur de Beaufort* (Union of Beaufort Producers), created in 1968, represents dairies and oversees the technical aspects of Beaufort production, assisting producers (dairies and individual farmers alike) to ensure high quality standards. The *Syndicat de Défense du Beaufort* (Beaufort Defense Consortium), created in 1975, regroups the entire supply chain (milk producers, individual and dairy cheesemakers, ripeners) and is charged with the collective promotion of Beaufort and the management of the PDO.

**Abondance** is a semi-hard, raw-milk cheese made in the Haute Savoie Department from Abondance, Montbéliarde and Tarine breeds of cattle. Its name indicates at the same time the cheese, the valley where the cheese is produced, the village from where the cheese originates, and the cow breed used for its production. The cheese received the PDO recognition in 1990. Its product specification allows for two varieties: the dairy-produced Abondance, made in cooperative dairies with milk from different breeders, and the farmer Abondance, from individual breeders who process directly their milk at their farm. The PDO is managed by the *Syndicat Interprofessionnel du Fromage Abondance* (Abondance Cheese Interprofessional Consortium), whose promotional campaigns have contributed to improve consumer awareness of this cheese.

The **Emmental de Savoie** (Savoyard Emmental) is a semi-hard cheese made in the Departments of Savoie and Haute Savoie with raw milk from the Tarine, Montbéliarde and Abondance cow breeds. The name derives from the Swiss Valley of Emme, crossed by the eponymous river. With time, Emmental came to be considered a generic name, and to be legally registered and protected, its origin had to be specified. In France, many areas produced their own Emmental and to preserve the specificities of the Savoyard Emmental, a first attempt is made in 1978 to organize the local supply chain with a product specification highlighting production methods and areas of origin under the

*Savoie* regional brand. In 1994, the *Syndicat de l'Emmental de Savoie* (Savoyard Emmental Consortium) is created, which carries out various legal actions to protect its members from the illicit use of the cheese name. In 1996, the *Syndicat* obtains the PGI recognition from the EU, marking the beginning of a new era for the safeguarding of the cheese and its supply chain. Today, only three cooperative dairies (*frutières*) produce Emmental de Savoie from milk from a total of 760 Savoyard breeders. Unlike other Savoyard cheeses, Emmental is not produced by individual farmers (it takes 1,000 litres of milk to create one wheel of Emmental) and the specification only foresees one product variety (i.e., no high-mountain pasture/summer Emmental). In France, Emmental suffers from a general poor image (i.e., industrial product to be used grated). Emmental de Savoie represented a very limited part of French Emmental production, but thanks to the IGP recognition its price per kilogram is higher than other Emmmentals. Following the 2006, reform of quality and origin identification signs in France, in 2008 the *Syndicat de l'Emmental de Savoie* has merged with the consortium safeguarding the Tomme de Savoie, with whom it shared most of the same milk producers and dairies. The new Defense and Management Body (*Organisme de Défense et de Gestion* under the French system) is called Savoïcime.

The *Tomme de Savoie* received the PGI certification in the same year of the Emmenthal de Savoie (1996) thanks to the effort of the *Syndicat Interprofessionnel de la Tomme de Savoie* (now dissolved and substituted by Savoïcime). While less known than other Savoyard cheeses, its smaller size permitted to produce it by dairies and individual farmers alike when there was not enough milk to produce larger cheeses such as the Emmental. Today, the Tomme de Savoie supply chain regroups almost 700 milk producers, more than 30 individual cheese producers, and more than 30 dairy cooperatives and ripeners. The product specification allows for the production of Tomme characterized by different levels of fat content (10%, 15%, 20%, 30%, whole milk). Inside Savoïcime, the Tome has its own budget and communication manager, and is represented by its own dedicated president.

The *Tome des Bauges* is an uncooked pressed cheese made with raw cow milk from the Tarine, Montbéliarde and Abondance cow breeds. The Tome has been a traditional family cheese in the Massif des Bauges since at least the 17<sup>th</sup> century. In 1968, Beaufort cheese's obtaining of the PDO certification encouraged producers from the Massif des Bauges area to organise themselves for a similar recognition. They decided to focus on the Tome, whose production required a more limited quantity of milk, and which was unique to the area and profoundly linked to the traditional practice of transhumance to high pastures. In 1972, the "Tome des Bauges" brand was registered. In 1986, the SITO (Syndicat Interprofessionnel de la Tome des Bauges) was formed with the goal to obtain a Controlled Designation of Origin (CDO). The process to develop product specifications was not easy, as different points of view emerged regarding the actual area of production and the admitted cattle breeds. Eventually, a compromise among producers, the SITO and the National Institute of the Designation of Origin (INAO) was made, and the CDO was obtained in 2002. Since 2017, the Tome has also benefitted from the UE-sanctioned PDO designation. Product specifications allow for two Tome varieties: the dairy Tome des Bauges, produced by 5 *frutières*, and farm Tome des Bauges, produced by 13 individual farmers.

*Chevrotin* is a soft cheese made from filtered, unpasteurized goat milk. In terms of annual quantities produced, it is the smallest of the PDO/PGI Savoyard cheeses. Chevrotin is produced in the Departments of Savoie and Haute Savoie, mostly in high-mountain pastures, and it comes only in the farm-produced variety. It obtained the Controlled Designation of Origin in 2002, which became a PDO in 2005. The goat breeds allowed by the product specification is the Savoyard and the Alpine, which need to represent at least 80% of the herd. The Chevrotin supply chain is composed of 22 breeder-cheesemakers and 4 ripeners, which are represented by the *Syndicat Interprofessionnel du Chevrotin* (Interprofessional Chevrotin Consortium).

The last Savoyard cheese to obtain a geographical indication, and thus join the fold of AFTALP, is the *Raclette de Savoie*, a pressed uncooked cheese made from raw or thermized Tarine, Abondance and Montbéliarde cows' milk produced in the Departments of Savoie and Haute Savoie, and in selected municipalities in the Departments of Ain and Isère. Raclette cheese, and the eponymous dish, is originally from Switzerland (specifically, the Canton of Valais, whose raclette cheese obtained a PDO recognition already in 2003). The history of this cheese is linked to the development of winter tourism in the 1960s and 1970s. During this period, local restaurants proposed highly appreciated cheese-based dishes to tourists and Tefal (the non-stick cookware company, which already in 1961 had localized itself in Rumilly, in Haute Savoie) to diversify its offer developed an electric oven with individual pans intended to prepare raclette at home. This led to cooperation with Savoyard dairies to develop a local version of raclette cheese with optimal melting characteristics (i.e. not exuding much oil when heated). During the late 2000s, the producers of Raclette de Savoie cooperate to obtain a PGI recognition, which is obtained in 2017. Represented by Savoïcime, the supply chain of Raclette de Savoie consists of 659 milk producers conferring their milk to cooperative dairies, 6 individual cheesemakers, and 14 between cooperative or larger-scale cheesemakers and ripeners.

Beside the member trade associations, AFTALP works together with several partners and stakeholders in the dairy/agricultural supply chain. These include *ILS - Interprofession Laitière des Savoies* (the Dairy Industry Interprofessional Consortium of Savoy), which coordinates the entire dairy supply chain in Savoy; and the *Chambre d'Agriculture Savoie Mont Blanc* (Chamber of Agriculture Savoy Mont Blanc). In addition, the association collaborates with the ENILV- *Ecole Nationale des Industries du Lait et des Viandes* (National School for the Dairy and Meat industries). On the tourism front, AFTALP also cooperates with *Savoie Mont Blanc Tourisme*, the association responsible for promoting the Departments of Savoie and Haute-Savoie as tourist destinations.

#### 4. Internal organisation

AFTALP is a small organisation. Its Board of Directors is composed by the eight presidents of the six involved trade associations (Savoïcime has three Presidents, one for each of the PGI cheeses it represents). At the operational level, the staff consists of seven people: the director; one accounting secretary; two employees responsible for the control of the membership guidelines of the eight cheeses; and the communication team, consisting of three employees responsible for all the association's promotional activities. These include the *Fête des Fromages de Savoie* (Savoy's Cheeses Festival), the *Route des Fromages de Savoie* (Savoy's Cheeses Route), and the *Ateliers Scolaires* (School Workshops and Activities), as well as advertising on traditional media (e.g., print

ads in the press, billboard advertising, flyers and brochures), online activities, and event-based communication (trade fair participations, in-store displays, etc.). AFTALP maintains a web site ([www.fromagesdesavoie.fr](http://www.fromagesdesavoie.fr)) in French with selected pages also available in English, which provides information on the traditional Savoyard PDO/PGI cheeses and visibility to the association promotional initiatives. On social media, AFTALP is only present on Facebook, with a dedicated page (<https://www.facebook.com/Les.Fromages.de.Savoie/>) whose posts mainly share pictures, videos and other content on the 8 cheeses involved. The page, in French only, counted about 5,300 likes in December 2018 and is updated infrequently and characterized by relatively low levels of online engagement in terms of number of likes, sharing, and comments to individual posts.

The overall communication strategy of the association is managed with the help of an external promotional agency, which also works with the other member associations, ensuring the coherence between the key messages communicated by AFTALP and those of the individual cheeses. Being a second-level promotional organization, AFTALP need to promote the eight traditional Savoyard cheeses as a whole, diffusing an overall image rooted in their common elements. AFTALP's activities complement the cheese-specific promotional activities carried out by the individual member associations. Lack of coordination might lead to various communication problems, such as discordant messages, overlap of initiatives, duplication, competition among the cheeses. With this informal coordination mechanisms, the overall communication mix of AFTALP and its constituting organizations can be optimized, allowing each trade association to work on their specific images and initiatives, and at the same time maintain a common positioning.

## **5. Promotional strategy and activities**

As a second-level promotional association, AFTALP finds itself in the not so easy situation to have to create a common image for all Savoyard cheeses, each of which has its own specificities. From a marketing communication perspective, a common market positioning is required, broad enough to include them all and capable of providing a useful base for the individual cheese's own promotional activities. To complicate matters, consumer awareness of these cheeses varies a lot with some which are much more known than others. Table 1 shows the results of a market study commissioned by AFTALP to consumer awareness of PDO/PGI cheeses, based on two focus groups (residents of Savoie and Haute-Savoie) and a questionnaire administered to 400 respondents (residents and tourists) during the summer/winter 2015/2016. The most known Savoyard cheeses are Reblochon, Beaufort and, generically, the Tomme. The least known are the Tome de Bauge, the Chevrotin, and the Emmental/Emmental de Savoie. Overall, this means that lesser known cheeses have more to gain from the association to the general image of traditional Savoyard cheeses than others, which already have a quite distinct market positioning. When it was constituted, AFTALP thus had to interrogate itself about which common values to communicate and ensure that the greater visibility of the most iconic Savoyard cheeses would also benefit the lesser known one. Over the years after its foundation in 1997, AFTALP had also to ensure that this common positioning would hold as new Savoyard cheeses obtained PDO/PGI recognition (Tome des Bauges, Chevrotin, and more recently Raclette de Savoie).



**Table 1 – Consumer awareness of Savoyard Cheeses**

<i>Summer 2015</i>	<i>Aided Recall</i>	<i>Spontaneous Recall</i>	<i>Top of Mind*</i>
Reblochon	100%	83%	26%
Beaufort	100%	70%	
Tomme (generic)	100%	55%	
Abondance	88%	35%	
Tomme de Savoie	97%	34%	
Tome des Bauges	68%	20%	
Chevrotin	61%	13%	
Emmental de Savoie	66%	2%	
Emmental (generic)		10%	
<i>Winter 2016</i>	<i>Aided Recall</i>	<i>Spontaneous Recall</i>	<i>Top of Mind*</i>
Reblochon	100%	78%	29%
Tomme (generic)	100%	71%	29%
Beaufort	100%	61%	21%
Abondance	85%	50%	15%
Tomme de Savoie	96%	20%	
Tome des Bauges	64%	6%	
Chevrotin	57%	4%	
Emmental de Savoie	78%	0%	
Emmental (generic)		10%	

\*Top of Mind: First cheese mentioned.

Source: AFTALP (2016a).

AFTALP’s response to these challenges was to emphasize the common elements of the Savoyard productive landscape that are at the base of the taste and quality of these cheeses: the biodiversity of the environment, the high-mountain pastures and protected natural areas of Savoie and Haute Savoie, the autochthonous cow and goat breeds, the traditional cheese-making practices, and the use of raw milk for cheese-making. Another shared element is the fact that all the traditional Savoyard cheeses promoted by AFTALP are safeguarded by PDO or PGI geographical indications, whose product specifications ensure their traditional production methods and link to the territory, serving as a quality sign for consumers.

These common elements are synthesized under the payoff ‘*Les Fromages de Savoie: Une Histoire Vraie*’ (Savoyard Cheeses: A True Story; see Figure 1). In the advertising jargon, a payoff is a slogan that sums up in a memorable manner the key promotional message or product premise. By highlighting Savoyard cheeses as ‘a true story’, AFTALP promotes them as authentic market offerings with a long history rooted in Savoy’s cheesemaking tradition. These same elements (productive landscapes and biodiverse mountain pastures, autochthonous breeds, traditional cheesemaking practices) also form the basis for AFTALP’s main promotional activities, some of which are intended as a means to create immersive consumer experiences that persuade consumers about the authenticity of these communicated elements.

The *Route des Fromages de Savoie* (Route of Savoyard Cheeses) consists of 74 member sites (farms, dairies, age maturing cellars) throughout Savoie and Haute Savoie, each of which engages to design activities (from the simplest to the most elaborated) that allow visitors (locals and tourists alike) to

experience aspects of the Savoyard cheesemaking tradition. Participation of member sites is voluntary; by taking part in the initiative, they commit to adequately host visitors at their sites, share their know-how, and facilitate direct visitor access to their operations and products. AFTALP coordinates and promote the initiative, defining the minimum requirements in terms of experience quality, and offering trainings and other learning opportunities to partner sites. The initiative absorbs a significant share of AFTALP's promotional budget and is intended as a valuable experiential marketing tools that reinforce the overall positioning of the traditional Savoyard cheeses, supporting at the same time the member organizations' promotional goals.

**Figure 1 – AFTALP's logo**



Source: [www.fromagesdesavoie.fr](http://www.fromagesdesavoie.fr)

The *Fête des Fromages de Savoie* (Festival of Savoyard Cheeses) takes place each year in different areas, focusing on one or another of the traditional Savoyard cheeses. Building on the tradition of the Savoyard alp festival (*fête de l'alpage*), the Festival aims to be a meeting place between local populations and the Savoyard Cheeses supply chains. First held in 2005, it aims to be a celebration of the Savoyard cheeses' heritage. The Festival is jointly organised by local communities and the PDO/PGI cheese collective organisations with the marketing and financial support of AFTALP, and under the latter's supervision. AFTALP specifies requirements for all involved parties (municipalities, local associations and restaurants; tourist offices; local farmers and the PDO/PGI organisations). The event planning takes one year and is assured by a steering committee with representatives of all involved actors. The Festival takes place outdoors at the end of June/the beginning of July. Activities target all ages, and include product/production demonstrations, cheese tastings, market stalls of artisans and local producers, on site restaurants, games, and spectacles. During the 2018 edition, the Festival attracted about 16,000 visitors; 2,500 meals were sold during the day; almost 1 ton of cheese were sold, and about 280 kgs were used for consumer tastings.

Another important promotional activity consists in the *Ateliers Scolaires* (school workshops and activities), organised in collaboration with schools in Savoie and Haute Savoie, that allows students to learn about the Savoyard cheesemaking processes and traditions. By providing educational material and workshop facilitators, AFTALP facilitates educational experiences with an entertainment element (also known as edutainment) appreciated by young students that contribute to the intergenerational awareness of the Savoyard cheesemaking tradition and stimulate interests towards Savoyard cheeses in tomorrow's consumers. The workshops involve trained farmers, paid by the Association. During 2017, 50 workshops took place at Savoyard schools, and another 50 in the context of the *Semaine du Goût* food festival.

Result from the 2015/16 market study suggest that the image of Savoyards cheeses is overall good for both residents and tourists (average score of 9 out of 10), and associated to taste (68% of respondents), terroir, quality, the mountains, pleasure, simplicity, sharing and conviviality. Tourists associate these cheeses also to cows (27% of respondents), residents of Haute-Savoie to traditional dishes (44%), and residents of Savoie to the high-mountain pastures (*alpages*, 68%). Most of the interviewee buy Savoyard cheeses because of their taste. Other important criteria of choice are: the safeguarding of the traditions and the savoir-faire and the guarantee offered by quality labels for tourists; the aging and the proximity to the place of production for the residents of Savoie; and the safeguarding of traditions and savoir-faire for residents of Haute-Savoie. Finally, the study shows the important role played by geographical indications in affecting the consumer choice and behaviour. Overall, consumers are more aware of the PDO than the PGI, and both are associated to quality and the respect of product specifications; 62% of respondents say that the presence of these labels influences their purchases.

## **6. Budget and sources of revenue**

AFTALP's total budget for 2018 was about €1,300,000, employed to cover the promotional budget, staff costs, and general organisational costs. The promotional budget of €430,000 was allocated the Route of Savoyard Cheeses (€100,000), the Festival of Savoyard Cheeses (€60,000), school workshops and activities (€60,000), and for the rest to advertising and participation to events and national/international trade fairs.

AFTALP activities are predominantly financed through participation fees paid differently by members of the Savoyard cheeses' supply chains based on their typology. Milk producers pay a fixed fee for each litre of milk produced that is transformed into one or the other of the Savoyard cheeses that AFTALP promotes. These fees are collected and then transferred by the *Fédération Départementale des Cooperatives Laitières* (Departmental Dairy Federation), the body which is in charge of the milk quality control process. Cheesemakers participate in the financing of AFTALP by buying the edible coloured casein pellets that need to be placed on every cheese and which contains information about production workshop number and production batch. The casein pellet is green, when the cheese is farm-produced, or red for dairy-produced cheese. Its price is set by each trade association during their annual general meeting, and it is the result of a collective decision-making process involving the entire cheese production chain. More in detail, the price varies based on the type of cheese and the quantity of milk required for the production of a single wheel. For instance, while almost 400 litres of milk are needed for the production of one wheel of Beaufort, only 5 litres are required for the production of one wheel of Reblochon. As a consequence, the Beaufort's casein pellet is more expensive than the Reblochon's one. Cheese ripeners do not give a direct contribution to AFTALP, but support the association's activities by buying cheeses from producers and, as a consequence, fostering their production.

Only a very limited part of AFTALP's budget comes from public sources, typically when AFTALP applies to calls for projects from the Rhône-Alpes Auvergne Region or the Union of Savoyards' Departments. In 2018, the expected public funding amounted to about €30,000. AFTALP's promotional activities are therefore mostly privately financed by the members of the supply chains

the association promotes. By pooling financial resources from these actors, AFTALP is thus able to exploit promotional synergies and implement strategies at a scale that would not be possible by the individual PDO/PGI cheese associations.

## 7. Impacts

It is difficult to assess the economic, social and cultural impacts of AFTALP for various reasons. First and most importantly, AFTALP is just one of the organizations whose activities contributes to the socio-economic performances of the Savoyard cheeses' supply chains. Second, available data only hints at these impacts, and some degrees of freedom are required to interpret them meaningfully. With these caveats in mind, some interesting insights come from the analysis of selected economic and brand image indicators.

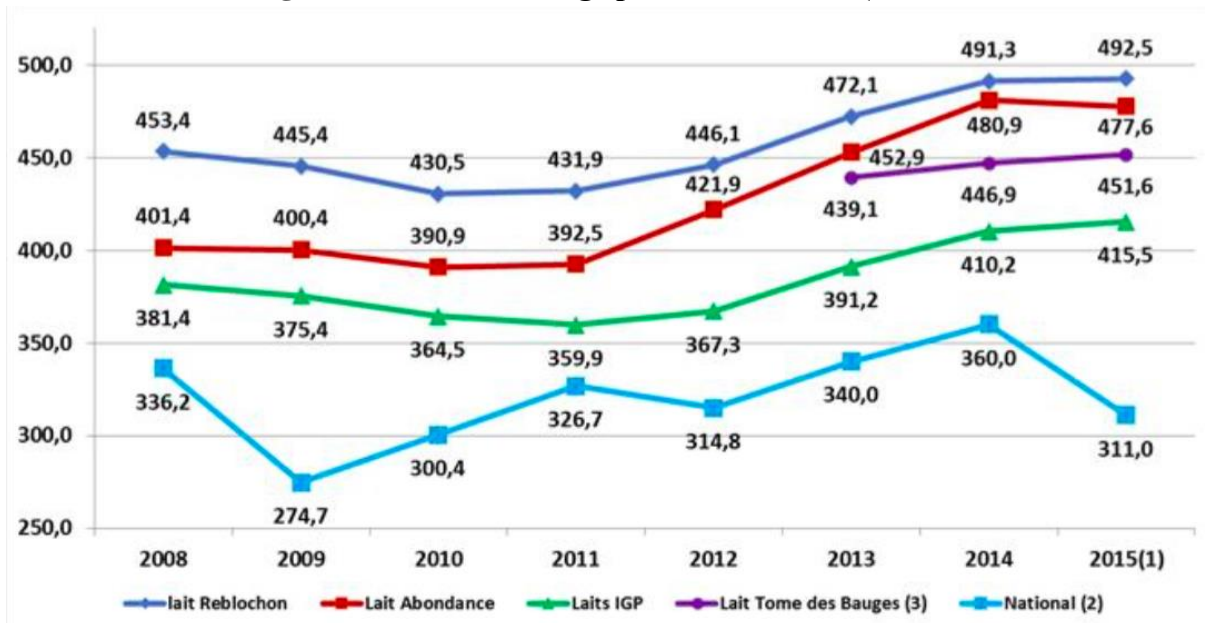
The dairy supply chain represents the most important agricultural sector in Savoie and Haute Savoie. It involves 2,000 milk producers, 60 dairies, 300 farms, and almost 4,600 employees. It only represents 1.5% of the total French milk production, but as much as 15% of the national PDO and PGI cheese production is from the two Savoyard Departments. The total production of the eight certified cheeses amounts to 33,100 tons, of which 4,500 (13.6%) is of farm-produced cheese; their combined turnover is about €310 million. The organization of the supply chain into cooperatives allows milk producers to protect the price of milk and to obtain a higher remuneration per litre produced (see Figure 1). Almost 1.2 Full Time Equivalents<sup>1</sup> are required for the production of 100,000 litres of Savoyard milk, which is 70% more than the national average (0.7 FTE / 100.000 litres of milk produced). This strategy results in an economic value of about 30,000 euros per FTE compared to the 21,350 euros of the national average (40% higher than the national average). The Savoyard PDO/PGI cheese sector is almost two times more profitable than the French average (€34,000 vs. €19,000 per Full Time Equivalent). The average price of Savoyard cheeses is higher than the other uncertified and PDO French cheeses (respectively, €9/kg and €13.87/kg). For example, the price of Abondance is €14.42/kg, of Beaufort €20.05/kg, of Reblochon €12.69/kg, and of Tomme de Savoie €11,63/kg.

The picture emerging from these data is one of a sector that is performing well from the economic point of view, comparing to the rest of France (even when considering the supply chains of other cheeses protected by geographical indications). Unlike the case of other cheeses whose supply chains are dominated by large, industrialized producers who try to keep the price of milk as low as possible and source it from where it costs the least, in the Savoyard departments the cooperative system has succeeded in adopting a protective milk price policy that favours local milk producers. At the same time, in the case of the PDO cheeses' supply chains, dairy cooperative production (from milk from different producers) coexists with dairy farms, which play an important role as landscape keepers and bearers of a more artisanal cheese production know-how that can be exploited to strengthen the Savoyard cheeses' image in the eyes of consumers and lend itself to synergies with tourism.

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<sup>1</sup> A Full Time Equivalent (FTE) is a unit of measure that indicates the workload of an employed person in a way that makes workloads comparable. For example, an employee working part-time at the 50% represents 0.5 FTEs. Two employees working part-time at the 50% represent 1 FTE.

**Figure 1 - Annual average price of raw milk (€/1000 litres)**



Source: AFTALP (2016).

At the core of these economic results are the decisions taken by the trade associations representing these cheeses, which have adopted product specifications that contribute to the safeguarding of various aspects of the traditional Savoyard cheese-making heritage, notably the practices linked to the seasonal droving of cattle to and the maintenance of high-mountain pastures. Such landscape-safeguarding measures contribute to the non-intensification of Savoyard agriculture and reduce in turn avalanche risks and facilitate the maintenance of ski slopes. In the Savoyard Departments, 90% of agricultural land (310,000 hectares) consists of grassland; of these 310,000 hectares, 220,000 are high-mountain pastures (*alpages*) dedicated to the feeding of herds. Thanks to the rules defined in the PDO and PGI product specifications, cow and goat breeds have to be primarily fed with grass from these high-mountain pastures (up to 2,500 metres above sea level) and local hay, which give the resulting cheeses their remarkable taste. The purchase of hay from areas external to Savoy and Haute-Savoie and the use of complementary feed is also limited and strictly regulated. Additionally, the rules of the game agreed by local actors and represented in product specifications prioritize the autochthonous cow and goat breeds and the use of raw milk, which permits to preserve its naturally present bacterial flora. Finally, product specifications dictate different production rules for dairy vs. farmer-produced cheese, thus highlighting how both kind of productions represent different but complementary parts of the traditional Savoyard cheese-making heritage. This in most cases has an impact on retail prices: for example, dairy-produced Reblochon is sold on average at €11/kg, whereas its farm-produced counterpart is priced at €16/€.

There are however important differences among the Savoyard cheeses in terms of volume produced (see Table 2), remuneration of milk (see again Figure 1), retail prices, and market awareness (see again Table 1). Since milk and cheese producers financially contribute to AFTALP based on their

production volumes, this means that the cheeses produced in smaller quantities (i.e., Chevrotin and Tome des Bauges) benefit from promotional campaigns at a scale that would not be possible if left at their own devices, which are mostly paid by the most successful cheeses (i.e., Reblochon, Tomme de Savoie, and Beaufort). Additionally, the common image of the most known cheeses is transferred to the less known ones, which so benefit from a reputational asset that it would be otherwise hard to generate from scratch.

**Table 2 – PDO/PGI Savoyard Cheeses: Production Volumes**

<i>Cheese</i>	<i>Total Production (tons)</i>	<i>Farm-produced production (tons, %)</i>
Reblochon PDO	15,656	2,002 (12.8%)
Beaufort PDO	5,050	n.a.
Abondance PDO	2,818	818 (29%)
Tome des Bauges PDO	924	100 (10.8%)
Chevrotin PDO	70	70 (100%)
Tomme de Savoie PGI	6,582	536 (8.1%)
Emmental de Savoie PGI	2,808	//
Raclette de Savoie PGI	2,168	//

Source: AFTALP (2017)

## 8. Concluding remarks

One of AFTALP’s main strengths is its collective marketing approach. As stated by its communication manager “*ALFTALP est un collectif de collectifs*”, a collective of collectives. Collaboration is evident at various levels across the Savoyard cheeses’ supply chains, from the *fruitières* to the *interprofessions*. Before the association was founded, Savoyard milk producers, breeders, and farmers already grouped together creating cooperatives and associations with the aim to join forces and to produce more and better cheese. They found strength in union and have succeeded in limiting the influence of industrial producers, that in the cases of other PDO/PGI cheeses (in France and elsewhere) have been able to influence product specifications in favour of their approach to production with rules of the games (e.g., pasteurized milk, intensive breeding, more productive breeds, use of complementary fodder) that prioritizes cost reduction over the link with the territory and traditional know-how.

In this collaborative context, AFTALP has brought the cooperation one step further. Its constitution has facilitated collaboration among the associations represented the traditional Savoyard cheeses, enabling them to pool resources and work together to achieve common promotional goals. In terms of communication strategy, the messages communicated from AFTALP look grounded in the reality of the underlying cheese supply chains, which have organized themselves and adopted product specifications that, while acknowledging differences in cheese production methods, have safeguarded traditional practices and know-how, the landscape, and limited intensive farming. More importantly, through various activities, AFTALP has been working to create a link between cheese as a consumer good (and the dishes prepared through it) and the supply chains behind it (high-mountain pastures, cows, the landscapes). Intangible cultural heritage is notoriously difficult to communicate, but experiential activities such as the school workshops, the Savoyard Cheeses’ Festival and the Savoyard Cheeses’ Route certainly contribute to reconnect consumers (residents and tourists alike) to producers

and generate a greater awareness of differences in production methods that, in turn, legitimise price differentials.

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