



2011 ACS CHEESEMAKER INDUSTRY SURVEY

The American Cheese Society (ACS) conducted the first comprehensive survey of cheesemakers in the United States and Canada in April 2011. ACS will use the information gathered from the survey to better serve, educate, promote, and advocate for North America's artisan, farmstead, and specialty cheesemakers.

The estimated population of cheesemakers in the United States and Canada as of April 2011 is 851. Of those 851 cheesemakers, 323 participated in the ACS survey. 61% of participants were ACS members. The survey was anonymous. The confidence level of the survey results is 95% and the confidence interval is +/- 4.3%.

For the purposes of this summary, the term *cheesemaker(s)* will be understood to include only artisan, farmstead, and specialty cheesemakers. Definitions of these terms can be found on the ACS website: <http://www.cheesesociety.org/i-heart-cheese/cheese-glossary>.

An overview of key trends from the survey data is below:

General Business Trends

The majority of cheesemakers produce cheese with cow's or goat's milk. 64% produce cheese made from cow's milk, while 51% produce cheese from goat's milk. A smaller proportion, 15%, produces cheese from sheep's milk. Just 1.5% of cheesemakers use buffalo's milk, and less than 0.5% use yak's milk. Please note that cheesemakers may utilize multiple milk sources.

Most cheesemakers produce more than one type of cheese. The average cheesemaker produces at least two types of cheese, including aged, fresh, soft and/or ripened, semi-soft, or blue cheese.

Cheesemakers produce varying quantities of cheese annually.

- 10% produce less than 1,000 lbs of cheese annually
- 34% produce between 1,001 – 10,000 lbs of cheese annually
- 24% produce between 10,001 – 50,000 lbs of cheese annually
- 7% produce between 50,001 and 100,000 lbs of cheese annually
- 12% produce between 100,001 – 500,000 lbs of cheese annually
- 13% produce over 500,000 lbs of cheese annually

The majority of cheesemakers want to grow their operation. 73% want to grow their operation in the next five years, while 25% want to sustain their current level of operation, and 2% want to reduce their operation.

The majority of respondents who are ACS members want to grow the size of their operation, while most non-members want to sustain or reduce their size. Of those cheesemakers that wish to grow their operation in the next five years, more than two-thirds (68%) are ACS members. Of those that wish to sustain or reduce their size, 57% are not members.

More than two-thirds of cheesemakers launched their business in 2000 or later.

- 9% launched their business before 1980
- 12% launched their business between 1980-1989
- 12% launched their business between 1990-1999
- 67% launched their business between 2000-2011

More than half of cheesemakers (58%) have 4 or fewer employees involved in cheese production, sales, or marketing. More than three-quarters of cheesemakers (77%) have 10 or fewer employees.

Raw Milk Trends

More than half of cheesemakers (57%) produce raw milk cheese. This does not exclude the production of cheese from pasteurized milk; cheesemakers may produce both raw and pasteurized cheeses.

Most cheesemakers that solely produce raw milk cheese reported that it would not be possible to switch to pasteurized cheese production. Switching from producing raw milk cheese to pasteurized milk cheese would not be feasible for 70% of these cheesemakers. Many raw milk cheesemakers cited financial constraints or logistical issues with their physical plant, e.g., size, number of rooms, etc. as reasons for their inability to switch to pasteurized cheese production.

More than half of raw milk cheesemakers (58%) have less than 4 employees, while 38% of pasteurized cheesemakers have less than 4 employees. Pasteurized cheesemakers are more likely than raw milk cheesemakers to have more than 30 employees (22% versus 4%).

HACCP Trends

More than half of cheesemakers (52%) have a HACCP (Hazard Analysis & Critical Control Points) plan in place. Of those that don't have a plan in place, 65% say they will implement a plan within the next two years, 22% do not intend to implement a HACCP plan, and 13% are not familiar with a HACCP plan.

62% of pasteurized cheesemakers have a HACCP plan in place. 46% of raw milk cheesemakers have a HACCP plan.

ACS members are more likely to have a HACCP plan in place. Of cheesemakers with a HACCP plan in place, 74% are ACS members. Nearly two-thirds of non-members (64%) do not have a HACCP plan.

When asked about the state of the industry: Many cheesemakers indicated concern with the state and future of raw milk cheese. They are also wary of the potential for change in the FDA's oversight of raw milk cheese. Others worry that small-scale cheesemakers might be left behind in the future and that the focus within the industry might shift to larger-scale operations.

About the American Cheese Society

The American Cheese Society (ACS) is the leading organization supporting the understanding, appreciation, and promotion of farmstead, artisan, and specialty cheeses produced in North America. Over 1,500 members strong, ACS provides advocacy, education, business development, and networking opportunities for cheesemakers, retailers, enthusiasts, and the extended industry. ACS strives to continually raise the quality and availability of cheese in North America. Learn more at <http://www.cheesesociety.org>.