



Grana Padano and the Protection Consortium



Consorzio Tutela Grana Padano

-
- Grana Padano's age-old history
 - Protection and Promotion
 - The numbers behind the world leader



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Grana Padano: an age-old history

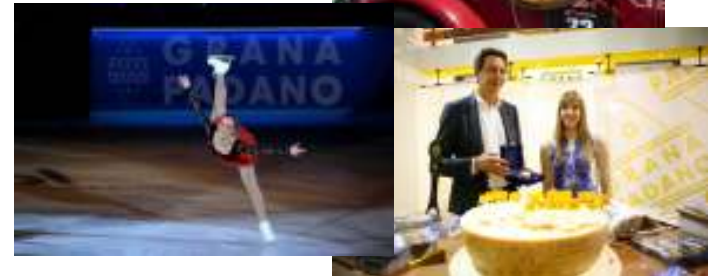
- Born in 1135 in the Abbey of Chiaravalle and called *caseus vetus* (old cheese)
- A hard cheese permitting long-term conservation of the milk
- Because of its grainy characteristics, it became known as *formaggio di grana* (grainy cheese), or more simply *grana*
- It was classified according to province of origin
- 1954: by national law, it is officially named **Grana Padano**
- 1955: PD 1269 – 30 October – Grana Padano D.O.C
- 1996: CE reg. no. 1107/96 – 12 June – Grana Padano P.D.O.



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The Consortium's activities

- Vigilance
- Control
- Promotion



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Aim and role of the Consorzio Tutela Grana Padano

- Non-profit making organisation
- Charged with protecting, promoting and enhancing the product, providing consumer information and generally taking care of the interests regarding its P.D.O. status
- Helps supervise and safeguard P.D.O. status from abuse, unfair competition, imitation, improper use of designation and any other behaviour forbidden by law during all stages of production, transformation and trade
- Promotes scientific and market research keyed to improving means and methods of production and marketing of Grana Padano cheese
- Has conceived and registered the “Grana Padano” trademark in Italy and numerous other countries.



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The Consortium and P.D.O. logos



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Grana Padano: Three vintages, three delicacies



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The Grana Padano production area



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The Consorzio di Tutela Grana Padano

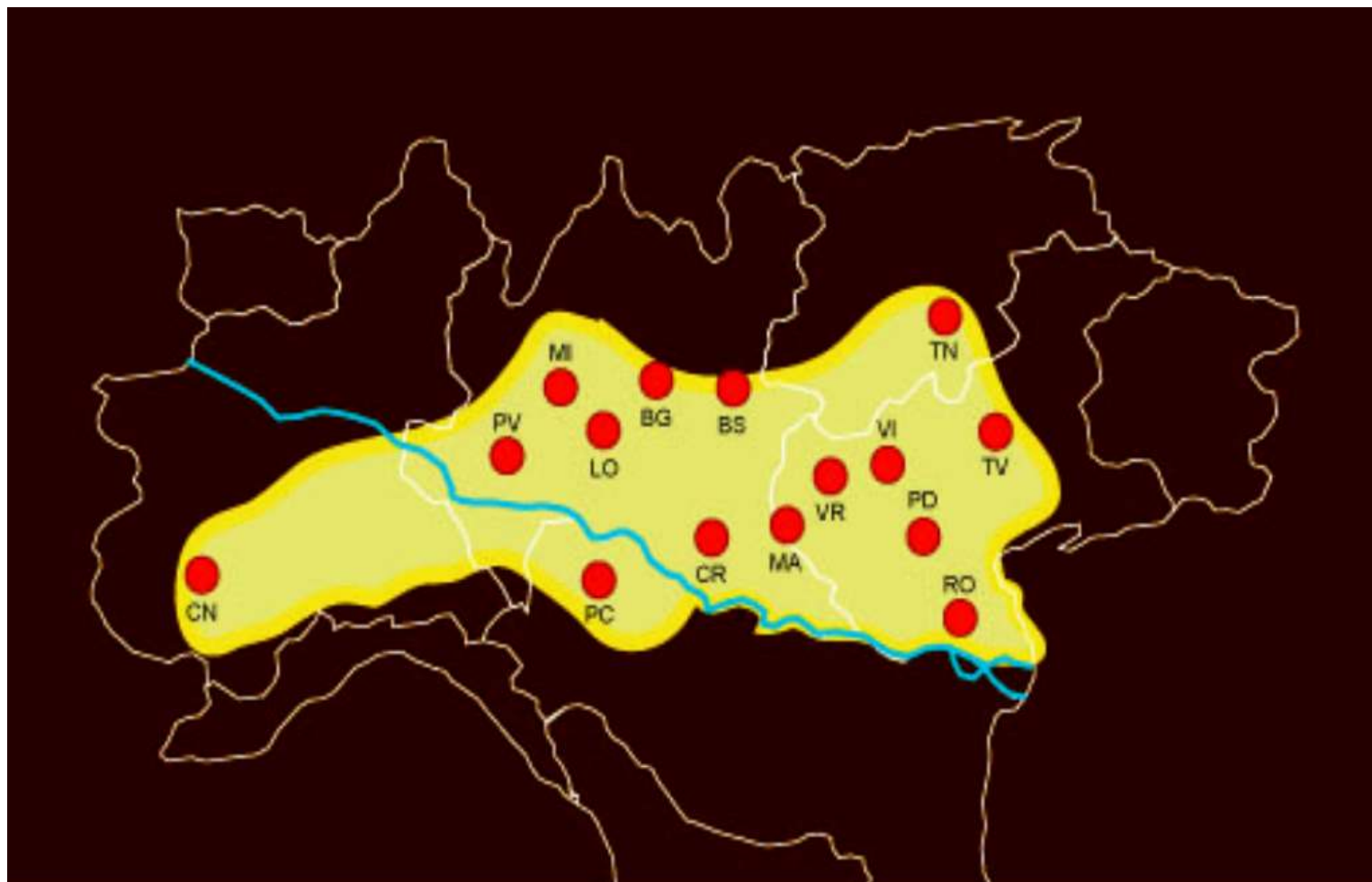
- Groups together 132 producer dairies
 156 affineurs
 177 packagers
- The production area includes:
 32 provinces from Piedmont to Veneto
- The production today is largely concentrated in 13 provinces
- The Consortium bodies comprise:

The Board
The Executive committee



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Provinces



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Statistics 2012 of the Consorzio di Tutela Grana Padano



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Production 2012	4.721.234 wheels of cheese (+1,34%) equivalent to 178.906,25 tons
GSP at production (value)	1,457 million Euros
GSP at consumption in Italy (value)	1,600 million Euros
GSP at consumption abroad (value)	800 million Euros
Division of annual production	59,95 % coops – 40,05% industries
N. of farms involved	5.322
N. of workers in the entire sector	40.000
Milk used to make Grana Padano	2.503.083,8 tons – 23 % Nat. Prod
Export	1.427.300 wheels – 30,2% Production



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Statistics 2013 of the Consorzio di Tutela Grana Padano



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Production 2013	4.565.337 wheels of cheese (-3,3%) equivalent to 173.917,117 tons
GSP at production (value)	1,790 million Euros
GSP at consumption (value)	2,800 million Euros (valuation)
N. of livestock milk producers	5.322
N. of workers in the entire sector	50.000
Export	1.450.000 wheels (+4%) - 31,8% Production (valuation)

Grana Padano is the best selling P.D.O. cheese in Italy and the world.



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Production 2012 - 2013

Month	Wheels 2012	Wheels 2013	± % vs 2012
January	453.049	431.511	- 4,75
February	443.630	415.285	- 6,39
March	488.014	475.400	- 2,58
April	471.076	455.416	- 3,32
May	464.392	445.207	- 4,13
June	418.667	397.698	- 5,01
July	348.053	317.736	- 8,71
August	316.027	272.542	- 13,76
September	270.100	266.536	- 1,32
October	311.071	335.512	7,86
November	337.798	353.030	4,51
December	399.357	399.464	0,03
Total	4.721.234	4.565.337	- 3,30
Variation %	+1,34%¹	- 3,30¹	

¹ variation vs the same period in the former year



Consorzio Tutela Grana Padano

Production 2013 - 2014

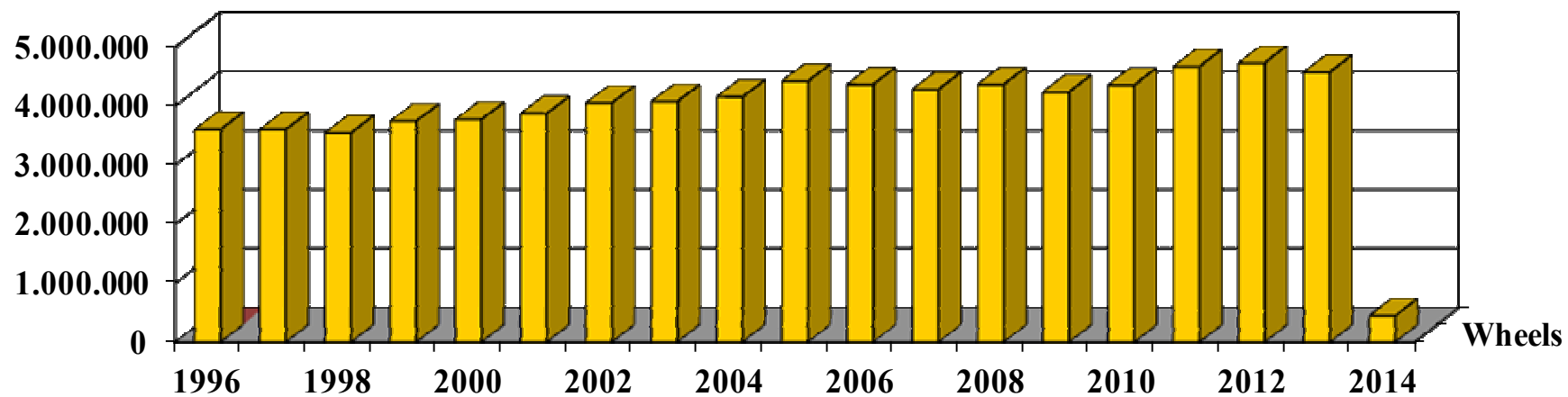
Month	Wheels 2013	Wheels 2014	± % vs 2013
January	431.511	442.836	+2,62
February	415.285		
March	475.400		
April	455.416		
May	445.207		
June	397.698		
July	317.736		
August	272.542		
September	266.536		
October	335.512		
November	353.030		
December	399.464		
Total	4.565.337	442.836	+2,62
Variation %	- 3,30¹	+2,62¹	

¹ variation vs the same period in the former year



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Production 1996 - 2014



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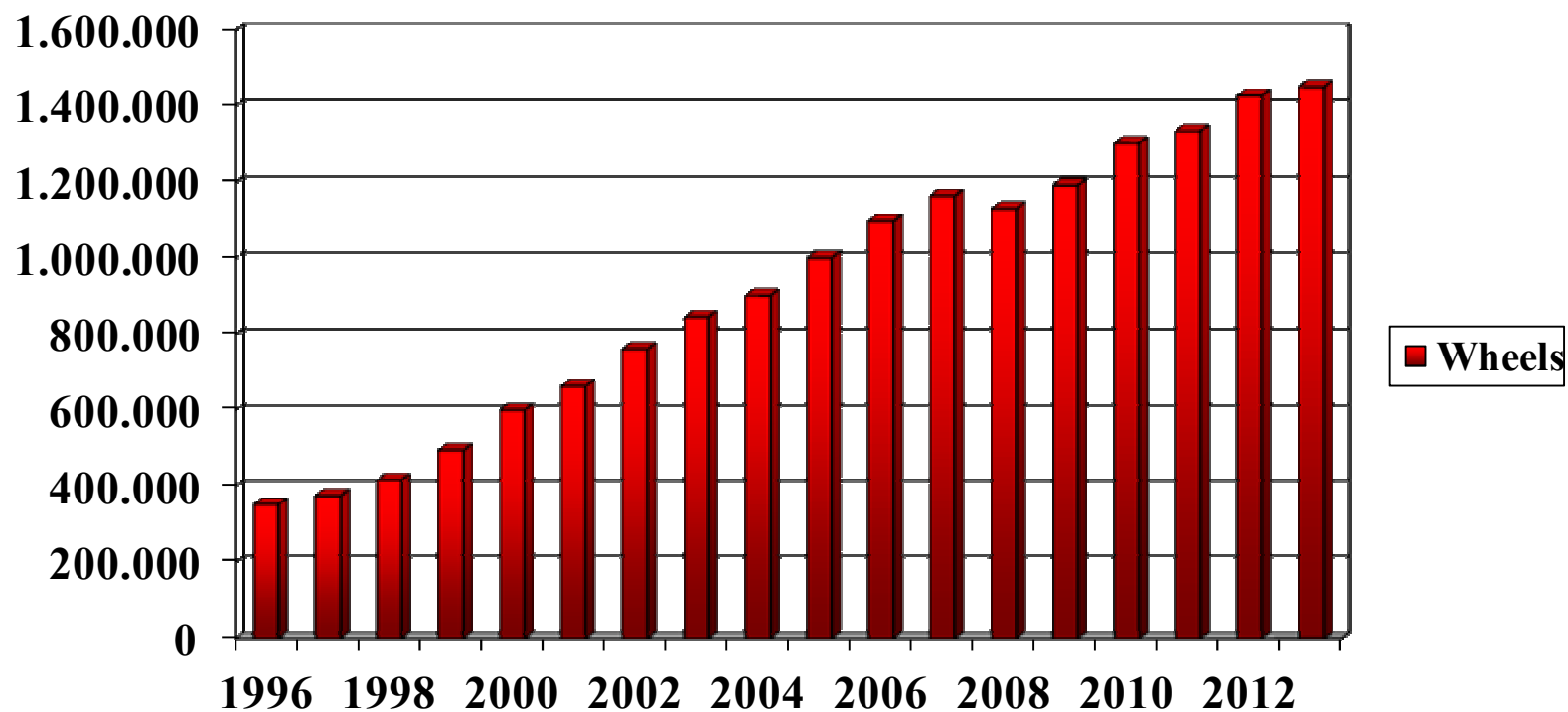


THE EXPORT MARKETS



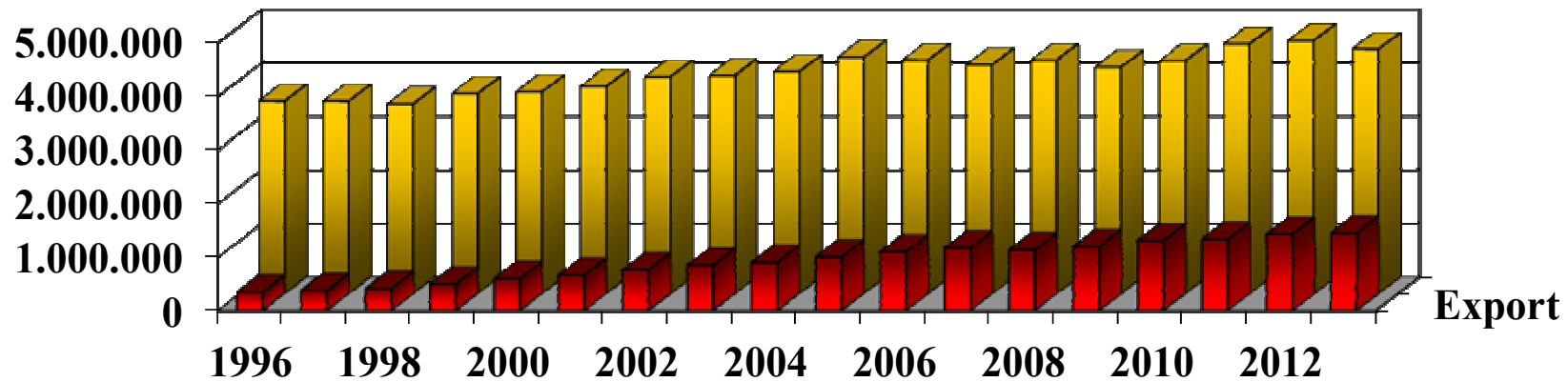
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Export 1996 - 2013



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Export/Production 1996 - 2013



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The export markets 2013

January - September

Continents	± % vs 2012
World	4,41%
U.E.	5,86%
Not U.E.	2,01%



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The export markets 2012

Continents	Nr. Wheels	%	± % vs 2011
World	1.427.300	100,0%	+7%
U.E.	896.057	62,78%	+6,1%
<i>Europe</i>	<i>1.075.082</i>	<i>75,32%</i>	<i>+ 5,7%</i>
Not U.E.	490.070	34,33%	+ 8,4%



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Export -Top Ten 2012

	Countries	Nr. Wheels	Var.% vs 2011
1°	GERMANY	328.847	6,67
2°	U.S.A.	143.904	4,02
3°	SWITZERLAND	132.560	-2,62
4°	FRANCE	124.940	9,11
5°	UNITED KINGDOM	107.612	0,54
6°	BELGIUM, HOLLAND, LUXEMBOURG	103.332	26,43
7°	CANADA	64.504	7,22
8°	AUSTRIA	45.167	3,77
9°	SPAIN	41.200	-0,34
10°	AUSTRALIA	37.502	7,04



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BEATING WITH THE HAMMER



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THE IMPORTANCE OF THE SOUND



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THE EXPERTISE WITH THE NEEDLE



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FIRE-BRANDING OF THE WHEEL WITH THE “GRANA PADANO” LOGO



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MATURING WAREHOUSE



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Governance and Institutional structure



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The Consorzio di Tutela Grana Padano

- Groups together 132 producer dairies
 156 affineurs
 177 packagers
- The Consortium bodies comprise (elections every 4 years):
 - The Board
 - The Executive committee

Board members are from our creameries
President can't receive more than 2 mandates in a row



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The Board

- Board is the decision maker
- The 27 members represent the whole community
- President, General director or single counselor on their own can't decide but must have the majority
- Board manages routine activities of the Consortia
- Major issues are dealt at the Yearly Meeting (budgets, vigilance, production plan approvals and modifications of the statute)

Representations within Yearly Meeting

- 1 Producers (creameries) divided in cooperatives and industries
- 2 Seasoners of Grana Padano
- 3 Graters, portion servers and packers

All have the right to vote but with different weights

For the time being no representatives of milk producers (fragmentation of the world of milk producers)

P.D.O. and Product Specifications

- Product Specifications: each P.D.O. good has an own manual
- In our case farmers and creameries must respect the specific rules – from the collection of the fodder to the packaging of the cheese
- It is up to the Consortium, a private association with public goals, to make sure that every producers respects the rules dictated by the Product Specifications

Procurement of milk

- The farmers must demand to be inserted within the official pool of producers of Grana Padano
- Farmers are subject of inspections by: CSQA (Grana Padano's certification body), the collecting creameries and the National Health Agency
- The milk is paid on a quality system (white blood cells, total bacteria plate count, fat and proteins)
- Negotiations of prices and quantities occur all year round. Price results simply from negotiations and is now around 41 euro cents / liter
- The milk produced for Grana Padano is the most expensive to purchase and Grana Padano is the cheese that guarantees highest revenues to the farmers.

Certification body

- Certification body CSQA (eventually reconfirmed every 3 years)
- CSQA is commissioned by the Ministry of Agriculture
- Plan of internal controls (Piano autocontrollo) – the “essence” are the dairies and their fundamental role in implementing the Product Specifications
- All the single steps involving the production of Grana Padano are controlled/supervised by CSQA – from the collection at the farm of the milk to the final fire-branding and then portioning, packaging and grating. So CSQA interacts with Production and Vigilance dept. of the Consortium
- The Consortium is not “obligatory”
- Small PDO goods don’t have the Consortia. Quality is verified by certification body and Vigilance is carried out the Ministry of Agriculture or Inspectorate of Repression of Frauds

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- Italian consumers give their full trust in PDO goods, in particular the main hams and cheeses. They correctly assume that these goods are severely controlled, safe and are satisfied with this state. Consumers are somehow “aware” that behind these goods are traditional production methods and controls. Big confusion on the origin of the raw materials.
 - These products are also very active in terms of advertising and are on our tables daily.
 - The amount of Grana Padano organic is irrelevant (more or less 0.2% of the production). This is perhaps an indirect sign that reveals the faith in the system.



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