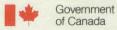
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VARIETY CHEESE IN CANADA PRODUCTION AND IMPORTS



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VARIETY CHEESE IN CANADA PRODUCTION AND IMPORTS

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FOREWORD

The purpose of this report is to trace the growth and development of the Canadian variety cheese industry, and provide information on its current status within the Canadian dairy industry. In the past this sector was relatively small when compared with that of the cheddar cheese industry, but recent statistics show that it is expanding rapidly and may overtake cheddar in total size within a few years.

Imports of foreign cheese may have impeded the Canadian production of several types of cheese, but many of the varieties imported are relatively small in volume and are not economical to manufacture in Canada. On the other hand, imports have stimulated Canadian sales of all types of cheese and developed markets for specific varieties of cheese.

This publication should be of interest to and a source of information for cheese manufacturers and those interested in the development and growth of the Canadian variety cheese industry.

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INTRODUCTION

The variety cheese industry was started in Canada by the early settlers who made the same cheese that they were accustomed to eating in their native country. As demand grew, production moved from the home to a local farm dairy where the milk from a farmer's herd, plus one or two neighbours', was made into cheese.

The immigrant often established a cheese factory of his own. In his home country both the milk supply and market for his cheese were relatively close together. In Canada conditions were different: the milk was in the country and the market in the larger urban centres. If the cheesemaker started in the country near the milk supply, marketing was a problem. Therefore, most variety cheese factories were established in the cities where the markets were -- mainly Kitchener, Hamilton, Toronto and Montreal.

No matter where a plant is situated manufacturing costs are high because of the large amount of hand labour necessary in production of these cheeses. Also, the cheesemaker has to make small batches, which normally do not have a long shelf life, in order to supply the varieties requested by the trade. These are the major differences with the cheddar industry where all milk is made into one type of cheese that can be stored for a long period.

The early variety cheese manufacturers were very much on their own. They did not receive support from the various government departments or from other associations within the industry, partly because they were not organized. The variety of nationalities involved and the variety of cheeses produced, plus the fact that many of the plants were small and privately owned by people who considered themselves specialists, made organization difficult.

Today, the location of a plant in relation to the market is still an important factor in the economy of a variety cheese operation. Because of the nature of these cheeses, the main market remains in the large urban centres and there is a distinct advantage in being close to the market where fresh cheese can be delivered daily. On the other hand, the cost of labour and capital cost of building a plant are more expensive in or near the city.

The competition for milk in the area surrounding a large city is from the fluid milk trade. The transportation charges from beyond this area make it more expensive to deliver milk to variety cheese plants located in large urban areas.

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There is, however, another source of milk in large cities known as <u>surplus milk</u>, but like all the other sources of milk in Canada the supply varies with the season. This is not a satisfactory supply of milk for variety cheese because, with few exceptions, the production and marketing of variety cheese are not seasonal. Production is fairly uniform from month to month, with a slight increase during December to meet the Christmas demand. Although surplus milk on its own is not a satisfactory source for variety cheese factories, it continues to play an important part in their operations.

In some provinces, variety cheese manufacturers pay a premium for milk over that charged to cheddar cheese manufacturers, in spite of the higher costs involved in making and marketing the numerous types of cheeses.

"Shophs mill" - " inductional multh"?

PRODUCTION

There were 118 variety cheese plants registered in Canada in 1979 as compared with 76 in 1976 and 61 in 1970 when the previous surveys were taken. These factories manufactured 58 varieties against 46 varieties in 1970.

Imports and production of variety cheese increased after World War II. Production moved ahead approximately one million pounds per year from 1948 to 1958, when it reached 4,720 tonnes (10,406,000 pounds). From 1959 to 1964, production increased by 887 tonnes (two million pounds) per year to 7,856 tonnes (17,320,000 pounds). During this period the increase with the exception of Gouda and Limburger, was in the European types of cheese similar to those imported. However, from 1964 to 1968 these remained fairly static and the increases were in Mozzarella, Brick and Colby types. In the period 1970 to 1975, major production gains again were shown for Brick, Colby, Mozzarella and other cheeses (Table 1). However, during the period 1976 to 1979 the major gains were shown for Cacioccevallo and Camembert (Table 1) with Mozzarella production still growing strong.

Mozzarella is still the most widely produced variety cheese accounting for <u>45 per cent of variety produc-</u> tion for the past five years. The maintenance of this percentage level and annual production increase is due to the pizza trade which has experienced tremendous growth in Canada. Mozzarella manufacturers have also been aided by the introduction of several ingenious machines that have assisted in automating production by mechanically stretching the curd while it is being tempered in hot water, and then automatically transferring it to molding and packaging machines.

As previously stated, variety cheese is more expensive to make than cheddar cheese. Production costs are high because, in many instances, a great deal of <u>hand labour</u> is required in manufacturing, molding and ripening small cheeses. Most variety cheese companies are relatively small operations, and it is often necessary for them to make several types of cheese in the same day. This requires additional equipment, such as different sizes and shapes of molds, salting vats and often separate curing rooms.

However, this has not discouraged Canadian manufacturers from increasing the production of their traditional varieties and also increasing the number of varieties manufactured. Those interviewed stated that there can be no doubt that imports of variety cheeses, over many years, have stimulated Canadians to consume more cheese and helped to increase the production of new varieties of cheese in Canada. Many felt that Canadian variety cheese is as good, if not better, than imported, because it can be marketed <u>fresh</u> and, hence, has a better flavour. In several instances it was pointed out that the lower prices of some bulk imported cheeses restricts the expansion of domestically manufactured variety cheeses.

TABLE 1

PRODUCTION IN CANADA OF FACTORY CHEESE OTHER THAN CHEDDAR

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	<u>1</u>	975	1	L976		1977 kg/000 lb)	-	1978	-	1979	Change 79/75
	kg	<u>1b</u>	kg	<u>1b</u>	kg	<u><u>1b</u></u>	kg	<u>1b</u>	kg	<u>lb</u>	
Brick Caciocavallo Camembert Colby Mozzarella Pizza Scamorza Other (1) Canada	5,474 79 57 3,211 18,150 4,374 267 9,628 40,880	12,043 174 125 7,064 39,930 9,623 587 20,390 89,936	6,531 101 55 3,780 21,420 5,022 242 10,305 47,456	14,368 222 121 8,316 47,124 11,048 532 22,671 104,403	7,491 109 161 3,950 24,226 5,778 301 11,999 54,015	16,480 240 354 8,690 53,297 12,712 662 26,398 118,833	7,465 170 252 4,113 26,741 6,568 284 13,706 59,299	16,423 374 554 9,049 58,830 14,450 625 30,153 130,458	6,955 203 474 4,200 29,419 7,642 270 16,170 65,333	15,301 447 1,043 9,240 64,722 16,812 594 35,574 143,733	+ 27 +157 +732 + 31 + 62 + 75 + 1 + 74 + 60
SKIM MILK and Skim Milk Cheese (2) Whey Cheese	1,173 875	<u>ESE</u> 2,581 1,925	1,104 1,082	2,429 2,380	1,094 868	2,407 1,910	788 998	1,734 2,196	633 1,041	1,393 2,290	- 46 + 19

Source: Statistics Canada (From Dairy Produce Market Report Using Conversion 2.2 lbs = 1 kg. where required)

- (1) Includes the following 45 varieties, which cannot be published separately because of statistical secrecy: Alpin, Amfrom, Basilica, Blue Vein, Bra, Brie, Burini, Carre, Chantelle, Cream, Dolce, Duro, Ermite, Esrom, Feta, Fontina, Formaggio, Fresco, Fresh Cheese, Furlana, Gouda, Grating Cheese, Gruyere, Jowa, Lemoine, Limburger, Maigrelet, Montasio, Monterey, Mt. St. Benoit, Oka, Portuguese, Provencal, Provolone, Quark, Richelieu, Romano, Serra-Vaquinha, Semi-soft, Spiced, Suries, St-Paulin, Swiss, Swuisca, Tilsiter.
- (2) Whey cheese normally known as Ricotta, is an Italian low fat cheese made from Mozzarella cheese whey to which some fresh milk is added.

TABLE 2

VARIETY CHEESE PRODUCTION BY AREA

(000 kg/000 lb)

	<u>1</u>	975	<u>1</u>	976	<u>19</u>	77	1	<u>978</u>	<u>19</u>	<u>79</u>
	kg	<u><u>lb</u></u>	kg	lb	kg	lb	kg	<u>1b</u>	kg	lb
Quebec	19,898	43,776	23,718	52 , 180	23,364	51 , 401	25,552	56,214	27,645	60,815
Ontario	18,312	40,286	20,493	45,085	27,261	59 , 974	30,009	66,020	33,681	74,098
Western Canada	2,670	5,874	3,245	7,139	3,390	7,458	3,738	8,224	4,007	8,815
Total	40,880	89,936	47,456	104,404	54,015	118,803	59 , 299	130,458	65,333	143,733

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Source: Statistics Canada (using conversion factor 2.2 = 1 kg when required).

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CHEESE IMPORTED INTO CANADA

Global Cheese Quota

One of the major issues affecting the variety cheese industry in Canada over the years has been the question of its competitiveness with imports. A global import quota for all types of cheese was established on June 6, 1975. This step was taken to simplify existing import controls and to support the Canadian supply management for manufacturing milk. The quota in effect restricted imports to some 15 per cent of consumption.

The global quota was established at 22,680 tonnes (50 million pounds). Quotas were allocated to traditional importers on the basis that they would maintain the same relative proportion of individual cheese varieties in their import volume as in 1973 and 1974.

To meet Canadian market requirements, an importer may be permitted to make a shift. That is, he may reduce by up to a maximum of 20 per cent by weight his entitlement for any type or variety in order to increase up to an equivalent weight another type or variety for which he has an entitlement. Importers are limited to a single switch for each type or variety. Requests to shift to varieties for which an importer has no entitlement or shifts into sensitive cheeses are not normally permitted.

There have been two major changes to the quota since its inception. The first was in the 1978/79 quota year when the global quota was reduced to 20,400 tonnes (45 million pounds). Secondly, as a result of the Multilateral Trade Negotiations, a cheese arrangement was negotiated with the European Economic Community (EEC). The quota essentially becomes two quotas, by allocating 60 per cent of 20,400 (45 million pounds) -- 12,250 tonnes (27 million pounds) to the EEC and 40 per cent -- 8,165 tonnes (18 million pounds) to all other countries. Allocations to traditional imports were done in such a manner as to maintain their historical sourcing patterns except in some cases where changes were requested by the importer. The agreement also resulted in the quota year being placed on a calendar year basis. This arrangement will be re-examined in 1982.

INTERNATONAL CHEESE ARRANGEMENTS

United States

as follows:

On December 20, 1979, the United States Department of Agriculture published the final rules for administration of Section 22 Import Quotas on cheese. Amendments contained in these rules have changed the regime for future cheese imports into the United States and Puerto Rico.

Effective January 1, 1980, the United States has eliminated the "price break" category of cheese imports and placed virtually all cheeses made from cow's milk under country quotas. Canada has received a quota restricting imports of Canadian cheese into the United States to a level of 2,044 tonnes. The quota is administered as follows:

	Basis of Entry	Tonnes	Pounds
Aged Canadian Cheddar (at least nine months)	unlicensed first-come, first-served	833	1,836,448
Swiss or Emmenthaler with eye formation	licensed U.S. importer	70	154,322
Other cheese NSPF	licensed U.S. importer	1,141	1,515,448
Total		2,044	4,506,218

The new import regulations permit Canada to subsidize cheese exports down to the wholesale price of like U.S. domestic cheese. The U.S. also made tariff reductions

- Cheddar cheese tariff is reduced from 15 per cent to 12 per cent effective January 1, 1980.
- Processed cheddar cheese tariff is reduced from 20 per cent to 16 per cent in two annual steps of 3 per cent on January 1, 1980, and 1 per cent on January 1, 1981.
- Swiss cheese tariffs will be reduced from 8 per cent to 6.4 per cent over a seven-year period starting January 1, 1980.
- Certain Italian type cheese tariffs will be reduced from 10 per cent to 7.5 per cent over a seven-year period starting January 1, 1980.

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European Economic Community (EEC)

Effective January 1, 1980, the access regime for exports of cheddar cheese matured nine months or more will be 2,750 tonnes (6.1 million pounds) per annum subject to a fixed tariff levy and minimum import prices at levels lower than under the previous 1975 arrangement. Access has been broken down into three basic size categories:

- 2. Retail packs 500 g (1.1 lb.) or over; and
- 3. Retail packs 500 g (1.1 lb.) or less.

Each of the three categories has a different minimum import price which must be respected; however, the fixed tariff levy is the same for all. The minimum import price is subject to adjustment in accordance with changes in the EEC threshold prices.

In return for improved access, the EEC has been ensured that 60 per cent of Canada's 45 million cheese import quota would be reserved for it and that the quota would not be reduced for the duration of the arrangement. In addition, the EEC must undertake not to undercut Canadian ex-factory prices through the operation of its restitution mechanism.

Other Countries

As a condition of the EEC/Canada cheese agreement, Canada is approaching other cheese supplying countries in an attempt to reach agreements whereby they will not undercut Canadian ex-factory prices through the use of export subsidies or restitutions.

GENERAL ROLE OF FOREIGN SUPPLIER IN THE

DOMESTIC MARKET

Canadian imports of cheese increased in the five year period 1971 - 1975 from 15,700 to 22,000 tonnes (34.6 to 48.6 million pounds) for an average market growth of about eight per cent per annum. Since the inception of the cheese import quota the growth of cheese imports have been curtailed.

TABLE 3

TOTAL	IMPORTS OF CHEE	SE INTO CANADA
	(Kilograms) (Pounds)
1971 1972		
1973	19,634,00	0 43,194,900
1974 1975	22,127,70	0 48,681,000
(1)*1976 1977	21,799,00	0 48,054,600
(1)*1978 (1)*1979	, , ,	• •

Source: Statistics Canada (using conversion factor 2.2 lb = 1 kg where required).

(1) Cheese import volumes appear to exceed quota levels for that year but in actual fact they did not. When coverting from the quota year April to March to the calendar year two high import periods are combined which give misleading results.

Canada imports more than 200 varieties of natural and processed cheese from 24 countries. Of these 10 countries account for the bulk of the shipments. Table 4 lists the countries and compares import volumes. Table 5 outlines the major foreign suppliers by country groups expressed in percentage terms.

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TABLE 4A

IMPORTS OF CHEESE INTO CANADA BY COUNTRY (Kilograms)

	1975(1)	1976 ⁽¹⁾	1977(2)	<u> 1978(2)</u>	1979(2)
Denmark	3,404,400	3,818,900	3,615,000	3,642,000	3,530,000
Netherlands	2,905,600	3,232,400	2,953,000	2,829,000	2,904,000
Switzerland	2,226,500	2,247,400	2,085,000	2,223,000	2,093,000
France	1,932,200	2,016,300	2,179,000	2,073,000	1,809,000
United States	2,104,000	1,499,000	1,971,000	1,305,000	1,514,000
Finland	1,165,100	1,167,700	1,243,000	1,288,000	1,390,000
West Germany	1,941,600	2,527,200	1,577,000	1,530,000	1,385,000
Italy	2,740,500	2,101,700	1,435,000	1,248,000	1,353,000
New Zealand	47,900	170,200	189,000	492,000	1,073,000
Austria	948,900	1,176,500	939,000	878,000	1,050,000
Norway	697,800	735,500	932,000	816,000	847,000
Argentina	272 , 500	619 , 700	852,000	767,000	596,000
Britain	3 99, 200	518,600	421,000	405,000	441,000
Romania	36 ,9 00	139,100	255,000	155,000	279,000
Sweden	238,800	264,800	290,000	224,000	195,000
Greece	306,800	76,800	86,000	351,000	156,000
Portugal	161,400	150,300	126,000	163,000	132,000
Australia	84,200	222,500	154,000	24,400	112,000
Poland	419,800	71,400	81,000	49,000	33,000
Ireland	55,100	306,800	145,000	52,000	33,000
Bulgaria	600		13,000	38,000	25,000
Belgium -			· · · · · · · · · · · · · · · · · · ·		
- Luxembourg	25 ,9 00	37,200	41,000	17,000	20,000
Iceland			_ _ _	19,000	18,000
South Africa		15 ,9 00	153,000	18,000	
Hungary	12,000		46,000	17,000	
Uruguay	<u></u>				13,000
Yugoslavia		18,000	18,000	7,000	
Philippines		900			
TOTAL	22,127,700	23,134,900	21,799,000	20,850,000	21,001,000

(1) Source: Statistics Canada (using conversion factor 2.2 lb.=1 kg)

(2) Source: Statistics Canada

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TABLE 4B

IMPORTS OF CHEESE INTO CANADA BY COUNTRY (Pounds)

	1975	1976	1977	1978	<u> 1979 </u>
v					
Denmark	7,489,700	8,401,500	7,792,200	8,028,500	7,782,900
Netherlands	6,392,300	7,111,300	6,509,600	6,236,700	6,403,300
Switzerland	4,898,200	4,944,300	4,596,400	4,899,700	4,614,900
France	4,250,900	4,435,800	4,803,900	4,570,600	3,986,100
United States	4,628,800	3,297,800	4,344,200	2,878,200	3,338,000
Finland	2,563,300	2,569,000	2,739,200	2,840,100	3,064,200
West Germany	4,271,600	5,559,900	3,476,900	2,931,200	3,055,100
Italy	6,029,000	4,623,800	3,162,500	3,192,300	2,984,100
New Zealand	105,400	374,400	415,600	1,084,500	2,365,800
Austria	2,087,500	2,588,400	2,068,100	1,834,000	2,314,800
Norway	1,535,200	1,618,200	2,055,500	1,799,700	1,867,800
Argentina	599,400	1,363,300	1,878,700	1,691,400	1,314,500
Britain	878,300	1,141,000	928,500	893,100	973,900
Romania	81,100	306,100	561,900	341,400	615,900
Sweden	525,300	582,500	637,900	495,000	428,600
Greece	674,900	168,900	190,400	774,900	343,600
Portugal	355,200	330,700	278,700	360,300	291,400
Australia	185,300	489,600	340,300	538,400	246,600
Poland	923,600	157,000	179,500	108,900	72,900
Ireland	121,200 .	675,000	320,000	114,900	72,600
Bulgaria	1,300		28,600	83,900	55,000
Belgium -				•	
- Luxembourg	57,000	81,800	90,500	36,400	44,200
Iceland				12,900	40,000
South Africa		35,000	336,300	39,500	
Hungary			99,600	37,200	
Uruguay	26,500				28,700
Yugoslavia		39,700	39,600	15,600	
Philippines		1,9 <u>00</u>			
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TOTAL

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48,681,000 50,896,900 48,054,600 45,969,100 46,304,300

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Source: Statistics Canada

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TABLE 5

MAJOR FOREIGN SUPPLIERS OF CHEESE EXPRESSED IN PERCENTAGE TERMS

Countries	<u>1975</u>	<u>1976</u>	1977	<u>1978</u>	<u>1979</u>
EEC (1)	60.6	62.93	56.74	56.57	54.64
Eastern Europe (2)	2.2	0.99	1.89	1.28	1.61
Western Europe (3)	26.0	25.15	26.15	28.50	27.91
United States	9.5	6.48	9.04	6.26	7.21
Other	1.7	4.45	6.18	7.39	8.63

- (1) Denmark, Netherlands, Italy, France, West Germany, Britain, Ireland, Belgium-Luxembourg
- (2) Romania, Poland, Bulgaria, Hungary, Yugoslavia
- (3) Austria, Switzerland, Finland, Norway, Sweden, Greece, Portugal

The EEC is Canada's largest supplier of cheese, but, since 1977 stiff competition from countries such as New Zealand and Finland has reduced the EEC market share of average of 60 per cent to 54 per cent in 1979. However, the EEC cheese sales and, hence, its prices still play a major role in the Canadian market (Table 6). The leading EEC supplying countries have consistently been Denmark, the Netherlands, West Germany and Italy.

The EEC, aware of its reducing market share, has negotiated a 60 per cent reserve in exchange for better access for Aged Canadian Cheedar into the EEC and in undertaking to not restitute cheese exports in such a manner that the ex-quay duty paid price does not undercut ex-factory prices of Canadian cheese.

TABLE 6A

QUANTITY AND VALUE OF CHEESE IMPORTS BY COUNTRY ORIGIN 1979

Country	Quantity (Kilograms)	Value (\$000) (F.O.B.)	Average Value (Per kg \$) (F.O.B.)
Denmark	3,530,000	11,275	3.19
Netherlands	2,904,000	8,865	3.05
Switzerland	2,093,000	9,200	4.40
France	1,809,000	7,625	4.21
United States	1,574,000	7,392	4.88
Finland	1,390,000	2 , 661	1.91
West Germany	1,385,000	3,760	2.71
Italy	1,353,000	6,510	4.81
New Zealand	1,073,000	1 , 753	1.63
Austria	1,050,000	2,498	2.38
Norway	847,000	2,803	3.31
Argentina	596,000	2,001	3.36
Britain	441,000	1,517	3.44
Romania	279,000	713	2.55
Sweden	195,000	564	2.89
Greece	156,000	682	4.37
Portugal	132,000	505	3.83
Australia	112,000	202	1.80
Poland	33,000	50	1.51
Ireland	33,000	52	1.58
Bulgaria	25,000	71	2.84
Belgium -			
- Luxembourg	20,000	87	4.35
Iceland	18,000	39	2.17
Uruguay	13,000	42	3.23
	21,001,000	70,867	

EEC Countries - Denmark, Netherlands, Italy, France, West Germany, Britain, Ireland, Belgium-Luxembourg

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Source: Statistics Canada

TABLE 6B

QUANTITY AND VALUE OF CHEESE IMPORTS BY COUNTRY ORIGIN 1979

Country	Quantity (Pounds)	Value (\$000) (F.O.B.)	Average Value (Per lb. \$) (F.O.B.)
Denmark	7,782,900	11,275	1.45
Netherlands	6,403,300	8,865	1.38
Switzerland	4,614,900	9,200	1.99
France	3,986,100	7 , 625	1.91
United States	3,338,000	7,392	2.21
Finland	3,064,200	2 , 661	· .87
West Germany	3,055,100	3,760	1.23
Italy	2,984,100	6,510	2.18
New Zealand	2,365,800	1,753	.74
Austria	2,314,800	2,498	1.08
Norway	1,867,800	2,803	1.50
Argentina	1,314,500	2,001	1.52
Britain	973 , 300	1,517	1.56
Romania	615,900	713	1.16
Sweden	428,600	564	· 1.32
Greece	343,600	682	1.98
Portugal	291,400	505	1.73
Australia	246,600	202	.82
Poland	72,900	50	.69
Ireland	72,600	52	.72
Bulgaria	55,000	71	1.29
Belgium -			
- Luxembourg	44,200	87	1.97
Iceland	40,000	39	.97
Uruguay	28,700	42	1.46
	46,304,300	70,867	

EEC Countries - Denmark, Netherlands, Italy, France, West Germany, Britain, Ireland, Belgium-Luxembourg

Source: Statistics Canada

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Although the value of cheese is shown and a calculation made per pound, this is not always a good basis for comparison. For example, a large percentage of the cheese entering Canada from Switzerland is in consumer size packages and the cost of cutting and wrapping is included in the price. Nevertheless, it gives an indication of the general value of cheese coming into Canada in 1979, which can be used to compare with the average Canadian wholesale price of approximately \$1.95 per pound.

Domestic Disappearance of Cheese in Canada

The consumption of variety cheese has been steadily increasing. Production has increased from 2,900 tonnes (6,427,000 pounds) in 1949 to 65,000 (144,732,000 pounds) in 1979. After considering imports, exports and year end stocks total domestic disappearance for 1979 totals 80,900 (178,354,000 pounds). Total per capita consumption rose from 0.22 to 3.5 kilograms (0.48 to 7.72 pounds) in the same period.

Table 7 shows the per capita consumption and Table 8 the domestic disappearance of these in Canada from 1975 to 1979. The consumption of variety cheese has increased by 37.9 per cent during the period, showing a greater growth than either cheddar, which decreased by 30 per cent, or process, which increased 10 per cent during this period.

TABLE 7

PER CAPITA CONSUMPTION OF CHEESE IN CANADA 1975 - 1979

	Cheddar ⁽¹⁾		Processed		Variety		Total	
	kg	lb	kg	<u>1b</u>	kg	<u>1b</u>	kg	<u>lb</u>
1975 1976 1977 1978 1979	2.02 1.66 1.47 1.35 1.41	4.44 3.66 3.25 2.97 3.11	2.54 2.69 2.74 2.98 2.80	5.61 5.92 6.05 6.56 6.17	2.62 2.78 2.96 3.26 3.62	5.78 6.13 6.53 7.18 7.97	7.18 7.13 7.17 7.59 7.83	15.83 15.71 15.83 16.71 17.25

(1) Represents cheddar cheese as such.

Source: Statistics Canada: 1979 statistics are preliminary figures and may be subsequently revised.

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TABLE 8

CHEESE IN CANADA

PRODUCTION, DOMESTIC DISAPPEARANCE, EXPORTS, IMPORTS

1975 - 1979

		Total Cheddar		s of kilograms/ f Pounds Rounded)	Total	Variety	
Year	Production	Exports	Domestic Disappearance	Production	Imports	Exports	Domestic Disappearance
	kg lb.	kg lb.	kg lb.	kg lb.	kg lb.	kg <u>lb.</u>	kg lb.
1975 1976 1977 1978 1979	80 176 78 172 80 177 80 177 97 213	1 2 1 2 1 2 .5 1 1 2	81 178 82 180 77 169 79 174 92 202	41 90 47 105 54 119 59 130 65 143	22492351224821462146	1 2 1.4 3 1 2 1.4 3 2.3 5	5913166146711577616881178

NOTE: Production less exports and plus imports does not equal domestic disappearance due to fluctuations in the amount of stocks in storage

Source: Statistics Canada

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It is interesting to note that total domestic disappearance of variety cheese (imports/domestic production), Table 8, which was reported at 131 million in 1975 as compared with total cheddar disappearance of 178 million in the same year, has moved to 178 million in 1979 compared with 213 million for cheddar. If this growth trend in variety consumption continues, total disappearance of variety may very well pass that of cheddar by 1985.

The table also reflects the lack of substantial growth in exports of both cheddar and variety cheese. Export sales of cheddar, which were upwards of 13,150 tonnes (29 million pounds) as recently as 1971, dropped when Britain joined the European Common Market (EEC). With the application of the EEC variable levy system in Britain there were virtually no sales of Canadian aged cheddar to that country. As a result of Multilateral Trade Negotiations special access terms have been granted to Canada for aged cheddar (nine months or more) which should result in increased sales. However, a quota has been applied to these access terms which will limit Canada to export of 2,700 tonnes (6 million pounds). This new access to the EEC and the quota restriction took effect January 1, 1980, and is subject to renegotiation January 1, 1982.

Variety cheese exports to the U.S. showed growth in 1979 represented primarily by <u>pizza cheese exports</u>. However, new U.S. import regulations, effective January 1, 1980, will restrict most of Canada's cheese exports to 2,000 tonnes (4.4 million pounds), 800 tonnes (1.8 million pounds) for aged cheddar and 1,180 tonnes (2.6 million pounds) for variety. There is unrestricted access for soft ripened cheeses and future increases in export to the U.S. will depend on development and production of soft ripened cheeses in Canada.

MARKETING

There are many problems in marketing variety cheese, particularly if the factory is not close to one of the large urban centres. There is no common marketing organization such as the <u>cheddar cheese board at Belleville</u>. The Canadian Dairy Commission does not support the price of variety cheese as it does milk powder and butter.

Compared with cheddar cheese, most of the cheese referred to here is <u>perishable</u>. The life of many varieties is numbered in weeks, regardless of storage conditions. Therefore distribution costs are high because small quantities of a number of varieties must be delivered frequently. When the volume is small, the gross operating margins must be higher than for cheeses such as cheddar. Any production of less than 23 tonnes (50,000 pounds) per year is, therefore, a problem. If the retail outlet does not have a suitable cheese counter, or does not rotate its stock, the deterioration is most rapid and can result in unsatisfied customers and increased cheese returns.

Variety cheese is marketed in many ways. A factory or a broker can sell it directly to a large number of small stores. It can be sold through wholesalers or contracted directly to large chains or packers. Finally, it can be sold directly from the plants' own retail outlets, which has become popular in recent years.

In addition to retail sales, there is the manufacturing trade. The pizza trade has been the salvation of some factories which could not compete with bulk imported cheeses. Thirty-seven of the 118 factories making variety cheese report producing some mozzarella in 1979. Mozzarella production in Canada increased from 5,100 tonnes (11,249,000 pounds) in 1970 to 36,975 tonnes (81,534,200 pounds) in 1979.

There was an expanding market for certain Canadian variety cheeses in the United States but with the new U.S. import regime starting January 1, 1980, Canadian access will essentially be restricted to approximately 2,000 tonnes (4.4 million pounds). As previously mentioned there is unrestricted access for soft surfaced ripen cheese but before Canada can appreciably exploit the market there must be more development and production of these types of cheese. There is, however, an alternative market which may permit Canada to increase exports of cheese and that market is Japan. The Japanese are starting to change their eating habits and increasing their consumption of cheese.

CONCLUSION

One of the greatest concerns to the variety cheesemaker has been the import of cheese in Canada. Because of the surplus of cheese in Europe and the restitutions (subsidies) being paid, large volumes of inexpensive cheese have been coming into Canada at less than the cost of Canadian The tariff on such cheese is $3\frac{1}{2}$ cents a pound. production. While the Department of Industry, Trade and Commerce introduced the global cheese quota in June 1975 to support the supply management program for milk, the problem of subsidized imports/within/the quota continues. However, the import market has become tight and there has been a shift from inexpensive cheese that could be used for processing to expensive table cheese not normally manufactured in Canada, or to prepacked gourmet cheeses. Several importers are also sourcing domestic Canadian supplies of variety cheeses.

As a result of the price undertaking negotiated between Canada and the EEC, it is anticipated that a greater portion of the cheese entering Canada will be at the same price level as the ex-factory Canadian price. This will provide added opportunity for the Canadian cheesemakers to expand their production facilities and manufacture new varieties. Negotiations with other supply countries are also being undertaken by Canada in an effort to reduce the amount of subsidized cheese entering the Canadian market.

CHEESE IMPORTS BY VARIETY 1979

	(000 kilograms) ¹	<u>(000 pounds)</u> ¹
Appenzel	7	15
Asiago	51	112
Bannon	24	53
Blue	623	1,371
Brie	261	575
Butter	143	314
Caerphilly	23	50
Camembert	221 468	486
Cheshire	169	372
Cream	88	193
Crotonese	135	296
Danablu	84	185
Danbo	26	56
Derby	15	. 32
Edam	2,065	4,543
Elbo	75	164
Emmental	1,088	2,394
Esrom	141	310
Feta	570	1,253
Fontal	22	48
Fontina	150	330
Friesan Clove	9	20
Fynbo	67	148
Gjetost	27	60
Gloucester	63	138
Gouda	1,871,.4300	4,115
Gournay	117	258
Grana	220	483
Gruyère	352 21	774
Hand		47
Harvarti Jarlsberg	1,283 539	2,823 1,186
Kasseri	122	268
Lancashire	39	208 85
Leicester	35	76
	14	30
Leyden	7.4	50

	(000 kilog	(rams) ¹	<u>(000 pounds)</u> ¹
Limburger	3		6
Maribo	11		25
Montasio	11		23
Morlacio	37		92
Mozzarella	251		551
Munster	57		126
Mycella	3		7
Norvegia	141		310
Parmesan	280		616
Parmesan grated	561		1,235
Pecorino Romano	113	. 011	249
Provolone	189	191	416
Raclette	19		41
Ricotta	26		56
Rigatino	31		67
Romano	636		1,400
Roquefort	37		82
Saint-Paulin	38		84
St. Jorge	60		131
Samsoe	256		564
Sardo	291		641
Sbrinz	87		192
Skim Milk	100		220
Stilton	40		87
Taffel .	7		16
Tilsit `	118		259
Tybo	34		75
Wensleydale	53		117
Miscellaneous	1,212		2,665
Total Natural	15,462		34,016
PROCESS CHEESE			
Cheddar	27		59
Emmental	35		78
Gruyère	1,486	1537	3,268
Smoked	100		220
Smoked Gruyère	57		126
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PROCESS CREAM

Cheese Spread Condiments Emmental Plain Miscellaneous	290 516 17 176 548	638 736 38 387 205
Total Process	3,252	155
Total Imports	18,714(2)	41,171(2)

Source: Agriculture Canada

- (1) Using conversion factor 2.2 lb. 1 kg
- (2) Since imports from Agriculture Canada are reported on a net weight basis, they do not agree with the gross weight basis that is published by Statistics Canada.

CHEESE BY VARIETY AND COMPANY OF MANUFACTURE

(STELLA) ALPINA

Ontario

Gos & Gris Cheese Ltd.

ANFLEUR

*

Québec

Les Produits Alimentaires Anco Ltée

ANFROM

Québec

Les Produits Alimentaires Anco Ltée

BELLE CREME

Québec

Laiterie Chez-Nous Ltée

BONNE MERE

Québec

Laiterie Chez-Nous Ltée

BRA (*NEW/+OLD)

Ontario

*Oak Grove Cheese Ltd. *+Salerno Dairy Prod. Ltd.

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BRA (*NEW/+OLD) (cont'd)

Québec

*Les Fromages Gemme Inc.

BRICK

Alberta

Faith Farms Ltd. Northern Alberta Dairy Pool U.I.D. Cheese Factory Co-op Ltd.

Manitoba

Manitoba Dairy & Poultry Co-op Ltd. Superior Cheese

Ontario

- Atwood Cheese Co. / Ault Foods Ltd. Baden Cheese Factory Ltd. Balderson Cheese Co. Beulah Coop Cheese Co. / Darigold Products Ltd.
- ⁹ Dairyland Foods Ltd. ⁹ Dairyland Foods Ltd. Glenco Cheese Ltd. Harrowsmith Cheese Maple Dale Cheese Ltd. Millbank Cheese & Butter National Cheese Co. Ltd. Oak Grove Cheese Ltd. Pine Grove Cheese Factory Pine River Cheese & Butter Inc. St. Albert Co-op Cheese Silani Sweet Cheese Factory Union Star Cheese Factory Walter Glitz Cheese Ltd.

Québec

Assoc. Laiterie Saguenay Lac St-Jean ✓Agropur Coop Laiterie sud du Québec Fromagerie Roland L'Etoile BRICK (cont'd)

Québec (cont'd)

Kraft Ltée Lactantia Ltée Les Aliments Delisle Les Fromages Gemme Inc. Les Produits Caillette Liberty Brand Products

BRIE

Québec

Les Fromages de Beaujeu

BRINE CURD BRICK

Ontario

 ✓ Ault Foods Ltd. Baden Cheese Factory Ltd.
 ✓ Balderson Cheese Co. Salerno Dairy Products Ltd. Union Star Cheese Factory Walter Glitz Cheese Ltd.

*BURRINI/+BUTTIRI

British Columbia

*Avalon Cheese Co. Ltd.

Alberta

*Alberta Cheese Co. Ltd. *+Lorica Cheese Manufacturing'Co.

Ontario

*Mannina Cheese Mfg. *Quality Cheese Co. *Salerno Dairy Prod. Ltd. *Spataro Cheese Factory

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***BURRINI/+BUTTIRI** (cont'd)

Québec

+Saputo Cheese Ltd.

BUTTER

 \checkmark

Manitoba

Manitoba Dairy & Poultry Coop Ltd.

Ontario

Silani Sweet Cheese Ltd.

Québec

Liberty Brand Products

CACIOCAVALLO

British Columbia

Avalon Cheese Co. Ltd.

Alberta

Alberta Cheese Co. Ltd. Lorica Cheese Manufacturing Co.

Manitoba

Superior Cheese Ltd.

Ontario

Mannina Cheese Co. National Cheese Co. Ltd. Salerno Dairy Prod. Ltd. Silani Sweet Cheese Ltd. Spataro Cheese Factory

Québec

V Saputo Cheese Ltée

CACIOTTA

British Columbia

Avalon Cheese Co. Ltd.

Ontario

Mannina Cheese Mfg. Quality Cheese Co. Salerno Dairy Prod. Ltd.

Québec

✓ Saputo Cheese Ltd.

CAMEMBERT

Alberta

Neapolis Dairy Alberta Farms Natural Produce Ltd.

Ontario

Baden Cheese Factory Ltd. Walter Glitz Cheese Ltd.

Québec

Les Fromages de Beaujeu Les Produits Alimentaires Anco Ltée

CASATA

Ontario

National Cheese Co. Ltd. Salerno Dairy Prod. Ltd.

CHEDDAR

British Columbia

Armstrong Cheese Shuswap-Okanagan Dairy Industries

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CHEDDAR (cont'd)

Alberta

Dutch Dairy Farms Ltd. Faith Farms Ltd. Northern Alberta Dairy Pool U.I.D. Cheese Factory Co-op Ltd.

Saskatchewan

Cypress Hill Cheese Ltd. Dairy Producers Co-op Bothwell Co-op Dairy Manitoba Dairy & Poultry Co-op Ltd. ~ Medo-Land Products (Subsec)?

North Star Co-op Superior Cheese Ltd.

Ontario

Atwood Cheese Co.

- ✓ Ault Foods Ltd.
- ✓ Balderson Cheese Co. Beulah Co-op Cheese Co. Black River Cheese Co. Central Cheese Mfg. Co.
- \checkmark Darigold Products Ltd. Dorchester Union Cheese Edorado Cheese Co. Empire Cheese & Butter Forfar Cheese Factory Glenco Cheese Ltd. Harrowsmith Cheese Maple Dale Cheese Ltd. Millbank Cheese & Butter Pine Grove Cheese Factory Pine River Cheese Coop Plum Hollow Cheese Riverside Cheese & Butter Inc. St. Albert Co-op Cheese Teeswater Creamery Ltd. Union Star Cheese Factory Warkworth Cheese Ltd.

Québec

Antonio & Noel Boivin Assoc. Laitiere Saguenay Lac St-Jean Chaine Coop du Saguenay Agropur Coop Laitiere sud du Québec Co-op Produits de lait de Montréal Crèmerie St-Fidèle Crèmerie de Trois-Rivières Crèmerie Union Inc. Dalpé et Frères Fromage Coté Inc. Fromagerie Daoust Fromages Grenier Inc. Fromage Victoria Inc. Fromagerie Lachaudière Fromagerie Lemaire Ltée Fromagerie Proulx Inc. Fromagerie Roland L'Etoile √Kraft Ltée ✓Lactantia Ltée Laiterie Chalifoux Inc. Laiterie Charlevoi Enrg. Laiterie Chateau Laiterie Chez-Nous Ltée Laiterie Coaticook Ltée Laiterie de Choix Laiterie Dallaire Laiterie de Dolbeau Laiterie Etchemin Inc. Laiterie Lamontagne Ltée Laiterie Leveille Inc. Fromagerie Lemaire Ltée Les Aliments Delisle Les Fromages Gemme Inc. Les Produits Caillette Les Produits Laitiers Lussier Liberty Brand Products A. Perron Inc. Produits Sevis Inc. Maurice St-Laurent S.C.A. de Fort Richelieu S.C.A. de L'Ile aux Grues S.C.A. de Pierreville Syndicat Gilbert

CHEDDAR (cont'd)

Maritime Provinces

Amalgamated Dairies Ltd. Producers Milk Prod. Ltd. G.E. Barbour Co. Ltd. Sussex Cheese & Butter

COLBY

Alberta

Faith Farms Ltd.
✓ Northern Alberta Dairy Pool
U.I.D. Cheese Factory Co-op Ltd.

Manitoba

Manitoba Dairy & Poultry Co-op Ltd. Superior Cheese Ltd.

Ontario

Atwood Cheese Co. ~ Ault Foods Ltd. Baden Cheese Factory Ltd. Balderson Cheese Co. Beulah Co-op Cheese Co. Darigold Products Ltd. Empire Cheese & Butter Forfar Cheese Factory Harrowsmith Cheese Maple Dale Cheese Ltd. Millbank Cheese & Butter Pine Grove Cheese Co-op Plum Hollow Cheese Riverside Cheese & Butter Inc. St. Albert Co-op Cheese Teeswater Creamery Ltd. Union Star Cheese Factory Walter Glitz Cheese Ltd.

Québec

Assoc. Laiterie Saguenay Lac St-Jean ✓ Agropur ✓ Kraft Ltée ✓ Lactantia Ltée Laiterie Leveille Inc. Les Fromages Gemme Inc. Liberty Brand Products A. Perron Inc.

COTTAGE CHEESE

Alberta

✓ Northern Alberta Dairy Pool

Saskatchewan

Dairy Producers Co-op

Ontario

Darigold Products Ltd. Portuguese Cheese Co.

Québec

 Agropur Laiterie Leveille Inc.
 Les Aliments Delisle
 Les Produits Laitiers Marieville Ltée
 Les Produits Laitiers Lussier
 Liberty Brand Products

CREAM CHEESE

Ontario

✓ Darigold Products Ltd.

Québec

Crescent Cheese Cie (Karrie?) V Kraft Ltée

Liberty Brand Products

CURDS

Alberta

Faith Farms Ltd.Northern Alberta Dairy Pool

Manitoba

Manitoba Dairy and Poultry Co-op Ltd.

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CURDS (cont'd)

Ontario

\checkmark Ault Foods Ltd.
Balderson Cheese Co.
Beulah Co-op Cheese Co.
, Darigold Products Ltd.
Dairyland Foods Ltd.
Glenco Cheese Ltd.
Maple Dale Cheese Ltd.
Pine River Cheese Co-op
Union Star Cheese Factory
Walter Glitz Cheese Ltd.

Québec

Fromagerie Lemaire Ltée /Lactantia Ltée

EDAM

Alberta

Folkerts Dairy

Québec

Coop Laiterie sud du Québec

EMMENTAL

Ontario

Glenco Cheese Ltd.

Québec

Dalpé et Frères

ESROM

Ontario

Atwood Cheese Co.

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FARMERS'

Alberta

Faith Farms Ltd.

Manitoba

Manitoba Dairy & Poultry Co-op Ltd. Superior Cheese Ltd.

<u>Ontario</u>

Ault Foods Ltd.
Baden Cheese Factory Ltd.
Balderson Cheese Co.
Darigold Products Ltd.
Dairyland Foods Ltd.
Millbank Cheese & Butter
Pine River Cheese Co-op
River Side Cheese & Butter Inc.
St. Albert Coop Cheese
Twin Pines Dairy
Union Star Cheese Factory
Walter Glitz Cheese Ltd.

Québec

Assoc. Laiterie Saguenay Lac St-Jean Kraft Ltée

 Lactantia Ltée Les Fromages Gemme Inc. Liberty Brand Products

FARMERS' SPICED

Ontario

Ault Foods Ltd.
 Baden Cheese Factory Ltd.
 Balderson Cheese Co.
 Darigold Products Ltd.
 Forfar Cheese Factory
 Riverside Cheese & Butter Inc.
 Union Star Cheese Factory
 Walter Glitz Cheese Ltd.

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FETA

Alberta

Alberta Farms Natural Produce Ltd.

Ontario

Ainos Milk Prod. Ltd. Macedonian Import-Export Ault Foods Ltd.

Québec

Laiterie Chez-Nous Ltée

FIOR DI LATTE

Ontario

Salerno Dairy Prod. Ltd.

FONTINA

Ontario

Atwood Cheese Co.

*FRUILANO (+MONTASIO)

Ontario

*Grande Cheese Co. Ltd. +Gos & Gris Cheese Ltd. *National Cheese Co. Ltd. *Spataro Cheese Factory *Silani Sweet Cheese Ltd.

GOAT'S MILK

Alberta

Alberta Farms Natural Produce Ltd.

GOAT'S MILK (cont'd)

Québec

Laiterie Chez-Nous Ltée Les Produits Alimentaires Anco Ltée

GOUDA

Alberta

Folkerts DairyNorthern Alberta Dairy Pool

Ontario

Atwood Cheese Col. Baden Cheese Factory Ltd. Millbank Cheese & Butter Walter Glitz Cheese Ltd.

Québec

Assoc. Laiterie Saguenay Lac St-Jean Coop Laiterie sud du Québec

Kraft Ltée
 A. Perron Inc.
 Produits Sevis Inc.

HAVARTI

Ontario

Ault Foods Ltd.
 Baden Cheese Factory Ltd.
 Balderson Cheese Co.
 Millbank Cheese & Butter
 Riverside Cheese & Butter Inc.

LE BARON

Québec

Laiterie Chez-Nous Ltée

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LIMBURGER

Ontario

Baden Cheese Factory Ltd.

MARBLE

Alberta

Dutch Dairy Farms Ltd. (Colby/Brick) Faith Farms Ltd.

Manitoba

Bothwell Co-op Dairy Manitoba Dairy & Poultry North Star Co-op Superior Cheese Ltd.

Ontario

✓ Ault Foods Ltd. Baden Cheese Factory Ltd. ✓ Balderson Cheese Co. ✓ Dairigold Products Ltd. • Dairyland Foods Ltd. Empire Cheese & Butter Forfar Cheese Factory Maple Dale Cheese Ltd. Millbank Cheese & Butter Pine Grove Cheese Factory Pine River Cheese Co-op Plum Hollow Cheese Riverside Cheese & Butter Inc. Teeswater Creamery Ltd. Union Star Cheese Factory Walter Glitz Cheese Ltd.

Québec

Coop Laiterie sud du Québec √ Kraft Ltée √ Lactantia Ltée

MONTEREY JACK

Manitoba

Manitoba Dairy & Poultry Co-op Ltd. Superior Cheese Ltd.

Ontario

- ✓ Ault Foods Ltd.
- ✓ Balderson Cheese
- ✓ Darigold Products Ltd.
 Millbank Cheese & Butter
 Union Star Cheese Factory

Québec

/ Kraft Ltée

MONT SAINT-BENOIT

Québec

Fromagerie Ermite

MOZZARELLA

British Columbia

Avalon Cheese Co. Ltd.

Alberta

Alberta Cheese Co. Ltd. Lorica Cheese Manufacturing Co. Northern Alberta Dairy Pool Pass Dairy

Manitoba

Manitoba Dairy & Poultry Co-op Ltd. Superior Cheese Ltd.

Ontario

Atwood Cheese Co. ✓ Ault Foods Ltd. Baden Cheese Factory Ltd.

MOZZARELLA (cont'd)

Ontario (cont'd)

Balderson Cheese Co. Darigold Products Ltd. Dairyland Foods Ltd. Grance Co. Ltd. Harrowsmith Cheese Mannina Cheese Mfg. Maple Dale Cheese Ltd. Millbank Cheese & Butter National Cheese Co. Ltd. Pine Grove Cheese Factory Quality Cheese Co. Riverside Cheese & Butter Inc. Roman Cheese Ltd. St. Albert Co-op Cheese Salerno Dairy Prod. Ltd. Silani Sweet Cheese Ltd. Spaturo Cheese Factory Walter Glitz Cheese Ltd.

Québec

Assoc. Laiterie Saguenay Lac St-Jean ~ Agropur " Cresent Cheese Cie European Cheese Factory ~ Kraft Ltée Les Fromages Gemme Inc. Les Produits Caillette Les Produits Laitiers Marieville Ltée

🗸 Saputo Cheese Ltée

MUNSTER

Ontario

- J Ault Foods Ltd.
- J Darigold Products Ltd. Riverside Cheese & Butter Inc.

Québec

√ Kraft Ltée

MYZITHRA

Ontario

Ainos Milk Prod. Ltd.

OKA

Québec

Fromagerie d'Oka Inc.

PARMESAN

Ontario

Gos & Gris Cheese Ltd.

Québec

Fromagerie Di Palma & Fils Ltée Kraft Ltée

* PROVOLONE (+PROVOLETTE)

British Columbia

*Avalon Cheese Co. Ltd. *Alberta Cheese Co. Ltd. *Lorica Cheese Manufacturing

Manitoba

*Superior Cheese Ltd.

Ontario

*Ault Foods Ltd.
*Grande Cheese Co. Ltd.
+Mannina Cheese Mfg.
*+National Cheese Co. Ltd.
*+Salerno Dairy Prod. Ltd.
*Silani Sweet Cheese Ltd.
*+Spataro Cheese Factory

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*PROVOLONE (+PROVOLETTE) (cont'd)

Québec

/ *Saputo Cheese Ltée

QUARK

Alberta

Neapolis Dairy

Ontario

Riverside Cheese & Butter Inc.

Québec

Liberty Brand Products

RICOTTA (+PRESSED)

British Columbia

Avalon Cheese Co. Ltd.

Alberta

Alberta Cheese Co. Ltd. Lorica Cheese Manufacturing Ltd.

<u>Ontario</u>

+Ainos Milk Prod Ltd. Grande Cheese Co. Ltd. Mannina Cheese Mfg. National Cheese Co. Ltd. Quality Cheese Co. Roman Cheese Ltd. +Salerno Dairy Prod. Ltd. Silani Sweet Cheese Ltd.

Québec

European Cheese Factory +Fromagerie Ermite Saputo Cheese Ltée

ROMANO

Ontario

Atwood Cheese Co. Oak Grove Cheese Ltd. Roman Cheese Ltd. Salerno Dairy Prod. Ltd.

Québec

Kraft Ltée

SAINT-PAULIN

Québec

Fromagerie d'Oka Inc. ✓ Lactantia Ltée Les Produits Alimentaires Anco Ltée

SCAMORZA

Alberta

Alberta Cheese Co. Ltd. Lorica Cheese Manufacturing Co.

Ontario

Grande Cheese Co. Ltd. Mannina Cheese Mfg. National Cheese Co. Ltd. Quality Cheese Co. Roman Cheese Ltd. Salerno Dairy Prod. Ltd. Silani Sweet Cheese Ltd. Spataro Cheese Factory

Québec

Les Produits Caillette JSaputo Cheese Ltée

SERRA

Ontario

Portuguese Cheese Co.

Québec

Les Produits Alimentaires Anco Ltée

SKIM MILK CHEESE

Alberta

Faith Farms Ltd.

Ontario

/Ault Foods Ltd. Baden Cheese Factory Ltd. /Balderson Cheese Co. Forfar Cheese Factory Riverside Cheese & Butter Inc.

Québec

Coop Laiterie sud du Québec European Cheese Factory VKraft Ltée Les Fromages Gemme Inc.

SOURIS

Ontario

Stouffville Creamery Co.

SWISS

Québec

Coop Laiterie sud du Québec Crèmerie St-Fidèle Fromagerie d'Oka Inc. Fromagerie Ermite J Kraft Ltée

TILSIT

<u>Ontario</u>

Baden Cheese Factory ✓ Balderson Cheese Co.

TOMME

Québec

Crèmerie St-Gérard Inc.

TUMA

Ontario

Spataro Cheese Factory

MISCELLANEOUS CHEESES:

CARAWAY

On<u>tario</u>

Baden Cheese Factory Ltd. - Balderson Cheese Co. Black River Cheese Co. Glenco Cheese Ltd. Harrowsmith Cheese Pine Grove Cheese Factory

Québec

✓ Agropur

GARLIC

Ontario

✓ Balderson Cheese Co.
 Black River Cheese Co.
 Glenco Cheese Ltd.
 Harrowsmith Cheese

GARLIC (cont'd)

Ontario (cont'd)

Pine Grove Cheese Factory Plum Hollow Cheese St. Albert Co-op Cheese

HERB AND GARLIC

Ontario

Baden Cheese Factory Ltd.

MONT ST. MICHEL

Québec

√Lactantia Ltée

ONION

Ontario

Baden Cheese Factory Ltd. JBalderson Cheese Co. Harrowsmith Cheese Pine Grove Cheese Factory

PEPPER

Ontario

Pine Grove Cheese Factory

SMOKED HICKORY

<u>Ontario</u>

/ Balderson Cheese Co.

SPICED BRICK

<u>Ontario</u>

Ault Foods Ltd.

ST. JORGE

Ontario

Portuguese Cheese Co.

VANQUINHA

<u>Ontario</u>

Portuguese Cheese Co.

WINE CURED

<u>Ontario</u>

/ Balderson Cheese Co.

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CHEESE FACTORIES IN CANADA BY PROVINCE AND VARIETIES MANUFACTURED

BRITISH COLUMBIA

Manufacturer

Varieties Manufactured

Armstrong Cheese P.O. Box 519 Armstrong, British Columbia VOE 1B0

Avalon Cheese Co. Ltd. 5805 Wales Avenue Vancouver, British Columbia V5R 3N5

Shuswap-Okanagan Dairy Industries Cooperative Association Salmon Arm, British Columbia VOE 2T0 Cheddar

Burrini, Caciocavello, Caciotta, Mozzarella, Provolone, Ricotta

Cheddar

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ALBERTA

Manufacturer

Alberta Cheese Co. Ltd. 8420 - 26 Street Southeast Calgary, Alberta T2C 1C7

Alberta Farms Natural Produce Ltd. R.R. No. 1 Millet, Alberta TOC 120

Dutch Dairy Farms Ltd. P.O. Box 447 Bashaw, Alberta TOB 0H0

Faith Farms Ltd. P.O. Box 357 10 - 2310 Gaetz Avenue Red Deer, Alberta T4N 5E3

Folkerts Dairy Rainier, Alberta TOJ 2M0

Lorica Cheese Manufacturing Co. 15108 116-A Avenue Edmonton, Alberta T5M 3W8

Neapolis Dairy R.R. No. 2 Didsbury, Alberta TOM 0W0

Varieties Manufactured

Burrini, Caciocavello, Mozzarella, Provolone, Ricotta, Scamorza

Camembert, Feta, Flavoured Soft Cheeses (Goat's Milk)

Cheddar, Marble (Colby/ Brick)

Brick, Cheddar, Colby, Curds, Farmers', Marble Skim Milk Cheese

Edam, Gouda

Buttiri (Burrini), Caciocavallo, Mozzarella, Provolone Ricotta, Scamorza

Camembert, Quark

ALBERTA

Manufacturer

Varieties Manufactured

N. Alberta Dairy Pool P.O. Box 367 Edmonton, Alberta T5J 2J8

> Pass Dairy P.O. Box 100 Bellevue, Alberta TOK 0C0

Brick, Cheddar, Colby, Curds, Cottage Cheese, Gouda, Mozzarella

Mozzarella

U.I.D. Cheese Factory Co-op Ltd. P.O. Box 1099 Glennwood, Alberta TOK 2R0 Brick, Cheddar, Colby, FUTURE: Edam

SASKATCHEWAN

Manufacturer

Varieties Manufactured

Cypress Hill Cheese Ltd. P.O. Box 894 Swift Current, Saskatchewan S9H 3W8

 Dairy Producers Co-op.
 501 - 23rd Street Southeast Saskatoon, Saskatchewan S7K 2L5 Cheddar

Cheddar, Cottage Cheese

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MANITOBA

Manufacturer

Varieties Manufactured

Bothwell Co-op Dairy New Bothwell, Manitoba ROA 1CO

Manitoba Dairy & Poultry Co-op Ltd. Rossburn, Manitoba R0J 1V0

Manitoba Dairy & Poultry Co-op Ltd. P.O. Box 580 507 First Street East Dauphin, Manitoba R7N 128

Manitoba Dairy & Poultry Co-op. Winkler, Manitoba R0G 2X0

Manitoba Dairy & Poultry Co-op. Ltd. Pilot Mound, Manitoba ROG 1P0

J? Medo-Land Products Grunthal, Manitoba ROA 0R0

> North Star Co-op. P.O. Box 38 Arborg, Manitoba ROC 0A0

Superior Cheese Ltd. Souris, Manitoba ROK 2C0 Cheddar, Marble

Brick, Butter, Cheddar, Colby, Curds, Farmers', Marble, Monterey Jack, Mozzarella

Cheddar

Cheddar FUTURE: Curds

Cheddar

Cheddar

Cheddar, Marble

Brick, Caciocavallo, Cheddar, Colby, Farmers', Marble, Monterey Jack, Mozzarella, Provolone

Manufacturer

Ainos Milk Prod. Ltd. 150 Nantucket Boulevard Scarborough, Ontario M1P 2P1

Atwood Cheese Ltd. Atwood, Ontario NOG 1B0

/ Ault Foods Ltd. P.O. Box 30 Winchester, Ontario K0C 2K0

> Baden Cheese Factory Ltd. P.O. Box 40 Baden, Ontario NOB 1G0

Balderson Cheese Co. Balderson, Ontario KOG 1A0

Varieties Manufactured

Feta, Myzithra, Ricotta (Pressed)

Brick, Cheddar, Colby, Esrom, Fontina, Gouda, Mozzarella, Romano FUTURE: Blue Cheese, Elbo

Brick, Cheddar, Colby, Curds, Farmers', Farmers' Spiced, Feta, Havarti, Marble, Monterey Jack, Mozzarella, Munster, Skim Milk Cheese MISC: Spiced Brick FUTURE: Gouda

Brick, Brine Cured Brick, Camembert, Colby, Farmers', Farmers' Spiced,, Gouda, Havarti, Limburger, Marble, Mozzarella, Skim Milk Cheese <u>MISC</u>: Herb & Garlic, Toasted Onion, Caraway

Brick, Cheddar, Colby, Curds, Farmers' Spiced, Marble, Monterey Jack, Mozzarella, Skim Milk Cheese <u>MISC:</u> Garlic, Onion, Caraway, Smoked

Hickory, Wine Cured

Manufacturer

Beulah Co-op Cheese Co. Madoc, Ontario KOK 2KO

Black River Cheese Co. Millford, Ontario KOK 2P0

Central Cheese Mfg. Co. P.O. Box 21 Stirling, Ontario KOK 3E0

Darigold Products Ltd. 550 Speers Road Oakville, Ontario L6K 2G3

? Dairyland Foods Ltd. Spenceville, Ontario KOE 1X0

> Dorchester Union Cheese R.R. No. 1 Dorchester, Ontario NOL 1G0

Eldorado Cheese Co. Eldorado, Ontario KOK 1X0

Empire Cheese & Butter Campbellford, Ontario KOL 1L0

Varieties Manufactured

Brick, Cheddar, Colby, Curds FUTURE: Mozzarella

Cheddar <u>MISC</u>: Garlic Cheddar, Caraway

Cheddar FUTURE: Colby

Brick, Cheddar, Colby, Cottage Cheese, Cream Cheese, Curds, Farmers', Farmers' Spiced, Marble, Monterey Jack, Mozzarella, Munster

Brick, Cheddar, Colby, Curds, Farmers', Marble, Mozzarella FUTURE: Quark

Cheddar

Cheddar

Cheddar, Colby, Marble

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ONTARIO

Manufacturer

Forfar Cheese Factory Forfar, Ontario KOG 1V0

Glenco Cheese Ltd. St. Andrews, Ontario KOS 2A0

Gos & Gris Cheese Ltd. Hannon, Ontario LOR 1P0

Grande Cheese Co. Ltd. 175 Milvan Drive Weston, Ontario M9L 128

Harold Cheese Mfg. Co. Stirling, Ontario KOK 3E0

Harrowsmith Cheese Harrowsmith, Ontario KOH 1V0

Macedonian Import-Export 415 Chestnut Street Dunnville, Ontario NIA 2H6

Varieties Manufactured

Cheddar, Colby, Farmers' Spiced, Marble, Skim Milk Cheese

Brick, Cheddar, Curds, Emmental <u>MISC</u>: Caraway, Garlic Cheddar

(Stella) Alpina, Furlano Montasio, Parmesan

Friulano, Mozzarella, Provolone, Ricotta, Scamorza

Cheddar

Brick, Cheddar, Colby, Mozzarella <u>MISC</u>: Caraway, Garlic-Onion

Feta <u>FUTURE</u>: Edam, Blue (

Edam, Blue Cheese

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Manufacturer

Mannina Cheese Mfg. 1555 Crawford Avenue Windsor, Ontario N8A 5B2

Maple Dale Cheese Ltd. Plainfield, Ontario KOK 2V0

Millbank Cheese & Butter P.O. Box 104 Millbank, Ontario NOK 1L0

National Cheese Co. Ltd. P.O. Box 27 Concord, Ontario L4K 1B2

Oak Grove Cheese Ltd. 29 Bleams Road East New Hamburg, Ontario NOB 2G0

Pine Grove Cheese Factory P.O. Box 730 Lakefield, Ontario KOL 2H0

Pine River Cheese Co-op. R.R. No. 4 Ripley, Ontario NOG 2R0

Varieties Manufactured

Burrini, Caciocavallo, Caciotta, Mozzarella, Provolette, Ricotta, Scamorza

Brick, Cheddar, Colby, Curds, Marble, Mozzarella

Brick, Cheddar, Colby, Farmers', Gouda, Havarti, Marble, Monterey Jack, Mozzarella

Brick, Caciocavallo, Casata, Friulano, Mozzarella, Provolette, Provolone, Ricotta, Scamorza

Brick, New Bra, Romano

Brick, Cheddar, Colby, Marble, Mozzarella, <u>MISC</u>: Onion, Garlic, Caraway, Pepper

Brick, Cheddar, Colby, Curds, Farmers', Marble <u>FUTURE</u>: Edam, Gouda, Tilsit

Manufacturer

Plum Hollow Cheese Athens, Ontario KOE 1B0

Portuguese Cheese Co. 2 Buckingham Street Toronto, Ontario M8Y 2W1

Quality Cheese Co. 55 Ossington Avenue Toronto, Ontario M6V 2Y9

Riverside Cheese & Butter Inc. P.O. Box 627 Trenton, Ontario K8V 5R7

Roman Cheese Ltd. 4916 Montrose Road Niagara Falls, Ontario L2H 1K5

St. Albert Co-op Cheese St. Albert, Ontario KOA 3C0

Salerno Dairy Prod. Ltd. 20 Morley Street Hamilton, Ontario L2R 3R7 Varieties Manufactured

Cheddar, Colby, Marble <u>MISC</u>: Garlic Cheddar

Cottage Cheese, Serra MISC: S. Jorge, Vaguinha

Burrini, Caciotta, Mozzarella, Ricotta, Scamorza

Brick, Cheddar, Colby, Farmers', Farmers' Spiced, Havarti, Marble, Mozzarella, Munster, Quark, Skim Milk Cheese

Mozzarella, Ricotta, Romano, Scamorza

Brick, Cheddar, Colby, Farmers', Mozzarella, MISC: Garlic Cheddar

Brine, Cured Brick, Burrini, Caciocavallo, Caciotta, Casata, Fior di Latte, Mozzarella, New Bra, Old Bra, Provolette, Provolone, Ricotta (Pressed), Romano, Scamorza

Manufacturer

Silani Sweet Cheese Ltd. Schomberg, Ontario LOG 1T0

Spataro Cheese Factory Cookstown, Ontario LOL 1L0

Stouffville Creamery Co. Stouffville, Ontario LOH 1L0

Teeswater Creamery Ltd. P.O. Box 370 Teeswater, Ontario NOG 2S0

Twin Pines Dairy 636 Aylmer Avenue Windsor, Ontario N9R 1V1

Union Star Cheese Factory R.R. No. 3 Renfrew, Ontario K7V 326

Walter Glitz Cheese Ltd. Milverton, Ontario NOK 1M0

Varieties Manufactured

Brick, Butter, Caciocavallo, Friulano, Mozzarella, Provolone, Ricotta, Scamorza

Brick, Burrini, Caciocavallo, Friulano, Mozzarella, Provolette, Provolone, Scamorza, Tuma, FUTURE: Edam

MISC: Souris

Cheddar, Colby, Marble

Farmers'

Brick, Brine Cured Brick, Cheddar, Colby, Curds, Farmers', Farmers' Spiced, Marble, Monterey Jack

Brick, Brine Cured Brick, Camembert, Colby, Curds, Farmers', Farmers' Spiced, Gouda, Marble, Mozzarella

Manufacturer

Warkworth Cheese Ltd. Warkworth, Ontario KOK 3K0 Varieties Manufactured

Brick, Cheddar, Colby, Curds, Marble, Mozzarella FUTURE: Monterey Jack, Munster, Farmers' Farmers' Spiced, Skim Milk Cheese Havarti

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Manufacturer

Varieties Manufactured

Cheddar

Antonio & Noel Boivin C.P. 1091 Rang St-Joseph Bagotville Cté Dubuc (Québec) G7B 3P3

Assoc. Laitière Saguenay Lac St-Jean C.P. 190 Desbiens (Québec) GOW 1W0

Chaine Co-op du Saguenay 240, rue Nelson Kenogami Cté Jonquière (Québec) G7X 1V8

Agropur 10, rue Laval C.P. 219 Granby Cté Shefford (Québec) J2G 7G2

Co-op Laitière sud du Québec Beauceville Cté Beauce (Québec) GOM 1A0

Co-op Latière sud du Québec La Durantaye Cté Bellechasse (Québec) JOR 1W0

Co-op Produits de Lait de Montréal 6200, boulevard Pelletier Ville Brossard Cté Laprairie (Québec) J4W 1L4 Brick, Cheddar, Colby, Farmers', Gouda, Mozzarella

Cheddar

Brick, Cheddar, Colby, Cottage Cheese, Mozzarella MISC: Caraway

Brick, Cheddar, Edam, Gouda, Marble, Skim Milk Cheese, Swiss

Cheddar, Edam, Gouda Swiss

Cheddar

Manufacturer

Varieties Manufactured

Crémerie St-Fidèle C.P. 27 St-Fidèle Cté Charlevoix (Québec) GOT 1T0

Crémerie de Trois-Rivières 700, rue Radisson Trois-Rivières (Québec) G90 5G7

Crémerie St-Gérard Inc. 2700 Rang Nord St-Gérard de Magella Cté l'Assomption, Québec JOK 3P0

Crémerie Union Inc. 1200, rue Gauthier Trois-Rivières Cté Laviolette (Québec) G82 1Y5

Crescent Cheese Cie. 100, rue Stinson Ville St-Laurent Montréal (Québec) H4N 2E8

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Dalphé et Frères 41, Calixa Lavallé Verchères (Québec) JOL 2R0

European Cheese Factory R.R. No. 3 Port Lewis Huntington (Québec) JOS 1H0 Cheddar, Swiss

Cheddar

Tomme <u>FUTURE</u>: Havarti, Fontina

Cheddar

Cream Cheese, Mozzarella

Cheddar, Emmental

Mozzarella, Skim Milk, Ricotta

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Manufacturer

Varieties Manufactured

Fromage Coté Inc. 12, rue Coran Kingsey Falls Cté Drummond (Québec) JOA 1B0

Fromagerie d'Oka Inc. 1400, chemin d'Oka Oka (Québec) JON 1E0

Fromagerie Di Palma & Fils Ltée C.P. 83 St-Liboire Cté Bagot (Québec) JoH 1R0

Fromagerie Ermite St-Benoit du Lac Cté Brome (Québec) JOB 2M0

Fromagerie Daoust 675, chemin de la Beauce Beauharnois (Québec) J6B 3B8

Fromages Grenier Inc. St-Georges de Windsor Cté Richmond (Québec) JOA 1JO

Fromage Victoria Inc. 101, rue Aqueduc Victoriaville Cté Arthabaska (Québec) G6P 1M2 Cheddar

Oka, Saint-Paulin, St. André (Swiss) Processed Cheese, Black Forest

Parmesan

Ricotta, Swiss MISC: Mt. Saint-Benoît FUTURE: Ricotta

Cheddar

Cheddar

Cheddar

Manufacturer

Varieties Manufactured

Fromage Lachaudière 3226, Laval nord Lac Megantic Cté Frontenac (Québec) G6B 1A4

Fromagerie Lemaire Ltée 2095, Route 122 St-Cyrille de Wendover Cté Drummond (Québec) J2C 1H0

Fromagerie Proulx Inc. St-Georges de Windsor Cté Richmond (Québec) JOA 1J0

Fromagerie Roland L'Etoile R.R. No. 1 Greenlay Cté Richmond (Québec) JOB 1V0

- ✓ Kraft Ltée 8600, Devonshire Mount Royal (Québec) H3C 3J3
- / Lactantia Ltée
 75, boulevard Industriel est
 Victoriaville
 Cté Athabaska (Québec)
 G6P 6T3

Laiterie Chalifoux Inc. 601, rue Fiset Sorel Cté Richelieu (Québec) J3P 3R9 Cheddar

Cheddar, Curds

Cheddar

Brick, Cheddar FUTURE: Brick, Mozzarella

Brick, Cheddar, Colby, Cream Cheese, Farmers', Gouda, Marble, Monterey Jack, Mozzarella, Munster, Parmesan, Romano, Skim Milk Cheese, Swiss

Brick, Cheddar, Colby, Curds, Farmers', Marble, Saint-Paulin MISC: Mont St-Michel

Carl Child Barter

Cheddar

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Manufacturer

Varieties Manufactured

Laiterie Charlevoix Enrg. 71, rue Lamaire Baie St-Paul (Québec) GOA 1B0

Laiterie Chateau C.P. 6 625, rue St-Georges Buckingham Cté Papineau (Québec) J8L 2El

Laiterie Chez-Nous Ltée C.P. 1090 St-Raymond Cté Portneuf (Québec) GOA 4G0

Laiterie Coaticook Ltée 45, rue Cleveland C.P. 1210 Coaticook Cté Stinstead (Québec) JIA 2N5

Laiterie de Choix C.P. 755 boulevard Benoit Amqui Cté Matapedia (Québec) G0J 1B0

Laiterie Dallaire C.P. 310 700, avenue Dallaire Rouyn Cté Noranda (Québec) J9X 4V9

Laiterie de Dolbeau 299, 8ième avenue Dolbeau Cté Roberval (Québec) G8L 1X1

Cheddar

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Cheddar

Belle Crème, Bonne Mère, Cheddar, Chèvre, Feta, Le Baron FUTURE: Camembert

Cheddar

Cheddar FUTURE: Swiss

Cheddar

Cheddar

Manufacturer

Laiterie Etchemin Inc. C.P. 99 3ième Avenue St-Ermaine de Lac Etchemin Cté Dorchester (Québec) GOR 1S0

Laiterie Lamontagne Ltée 59, Ste-Jeanne d'Arc Jonquière (Québec) G7X 3M8

Laiterie Léveillé Inc. 153, rue Turgeon Ste-Thérèse Cté Terrebonne (Québec) J7E 3J2

Fromagerie Lemaire Ltée 2095, Route 122 St-Cyrille de Wendover (Québec) J2C 1H0

Les Aliments Delisle 100, rue Lauzon Boucherville (Québec) J4B 1E6

Les Fromages de Beaujeu 100, chemin de Beaujeu St-Polycarpe Cté Vaudreuil (Québec) JOP 1X0

Les Fromages Gemme, Inc. 616, Ruisseau Barre Marieville Cté Rouville (Québec) JOL 1J0 Varieties Manufactured

Cheddar

Cheddar

Cheddar, Colby, Cottage Cheese

Cheddar, Curds

Brick, Cheddar, Cottage Cheese

Brie, Camembert

Brick, Cheddar, Colby, Farmers', Mozzarella, New Bra, Skim Milk Cheese and the second description of the second

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QUÉBEC

Manufacturer

Varieties Manufactured

Les Produits Alimentaires Anco Ltée 10205, boulevard Parkway Montréal (Québec) HlJ 1P9

Les Produits Caillette 116, boulevard Maskinongé est Cté Maskinongé (Québec) JOK 1N0

Les Produits Laitiers Marieville Ltée 2350, rue St. Césaire C.P. 1059 Marieville Cté Iberville (Québec) JOL 1J0

Les Produits Laitiers Lussier 2875, Nelson St-Hyacinthe (Québec) J2S 1Y5

Liberty Brand Products 1425, Provencher Brossardville Cté La Prairie (Québec) J4W 123

A. Perron Inc. C.P. 26 Ste-Prime Cté Roberval (Québec) G8H 2N4

Produits Sévis Inc. 1022, Rang St-Camille Bellefeuille Cté Terrebonne (Québec) JOR 1A0 Anfleur, Anfrom, Camembert, Chèvre, Saint-Paulin, Serra

Brick, Cheddar, Mozzarella, Scamorza

Cottage Cheese, Mozzarella

Cheddar, Cottage Cheese

Brick, Butter, Cheddar, Colby, Cottage Cheese, Cream Cheese, Farmers', Quark

Butter, Cheddar, Colby, Gouda FUTURE: Emmental

Cheddar, Gouda

Manufacturer

Varieties Manufactured

Maurice St-Laurent St-Bruno Cté Lac St-Jean (Québec) GOW 2L0

S.C.A. De Fort Richelieu 186, rue Provost Sorel Cté Richelieu (Québec) J3P 1R5

S.C.A. de L'Ile aux Grues L'Ile aux Grues Cté Montmagny (Québec) GOR 1P0

S.C.A. de Pierreville R.R. No. 1 Pierreville Cté Yamaska (Québec) JOG 1J0

Saputo Cheese Ltée 8500, 8ième Avenue Montréal (Québec) H1Z 2W6

Syndicat Gilbert R.R. No. 2 St-Joseph Cté Beauce (Québec) GOS 2V0 Cheddar <u>FUTURE</u>: Mozzarella

Cheddar

Cheddar

Cheddar

Buttiri, Caciocavallo, Caciotta, Mozzarella, Provolone, Ricotta, Scamorza, Tuma

Full Constant of the

WALL NEEDER

Cheddar

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MARITIME PROVINCES

Manufacturer

Varieties Manufactured

Amalgamated Dairies Ltd. P.O. Box 1446 Summerside, Prince Edward Island ClN 4K4

Producers Milk Prod. Ltd. P.O. Box 644 Truro, Nova Scotia B2N 5E5

G.E. Barbour Co. Ltd. P.O. Box 1130 Sussex, New Brunswick E0E 1P0

Sussex Cheese & Butter P.O. Box 399 Sussex, New Brunswick E0E 1P0 Cheddar

Cheddar

Cheddar

Cheddar

