DBIA Import Displacement Report:
Goat and Sheep Specialty Cheeses

1. Background/Context

a. DBIA Rationale

The goat and sheep cheese industry is a sizable market both nationally and internationally and continues to see significant growth rates. Domestically, US sheep and goat cheese production faces strong competition from imported products. As part of the USDA's Dairy Business Innovation Initiative, the Wisconsin based center – the Dairy Business Innovation Alliance (DBIA) sought to investigate the challenges faced by domestic producers and identify opportunities to better compete with imported products. The DBIA has carried out a market intelligence survey to ascertain consumer attitudes and preferences. We also carried out a sensory review of specific domestic versus imported products to qualitatively define perceived differences. Due to this, DBIA believes import displacement can lead to a growth opportunity. DBIA proposed this market intelligence and sensory project to understand consumer behavior when purchasing goat and sheep cheeses and to provide small to medium size cheesemakers with more insight into the goat and sheep market.

b. Mintel Presentation

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The DBIA commissioned a national survey of 1,000 US consumers who brought goat or sheep cheeses in the last three months. The objective was to identify key consumer attitudes and preferences for goat and sheep cheeses as part of research into initiating import displacement,

The full presentation can be accessed via the DBIA website: https://www.cdr.wisc.edu/import-displacement

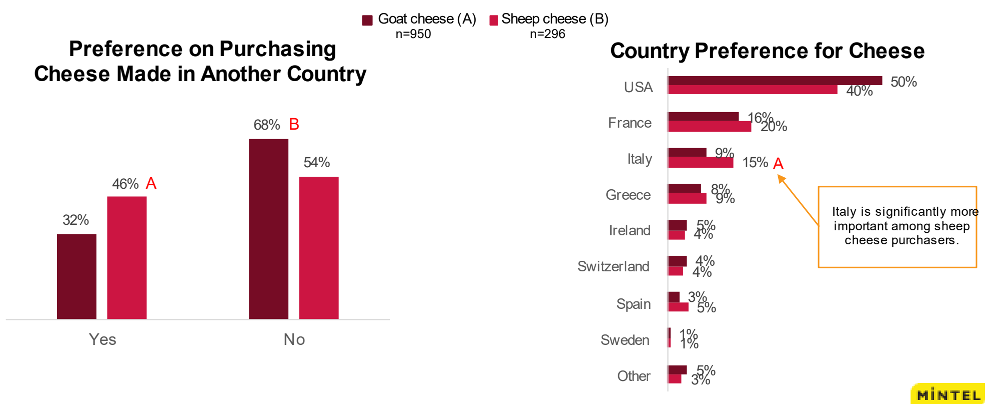
Key Findings:

- Consumers are willing to pay more for goat and sheep cheeses when compared to cow cheeses.
- Consumers willing to pay more also reported that when buying these cheeses, texture was the most important attribute (82% of respondents), followed by a clean label.
- Consumers also disclosed that unique flavor, organic, and texture are the most important purchasing attributes for both sheep and goat cheeses.

The survey also revealed that goat and sheep cheeses are consumed in different ways. Goat cheese was found to be commonly used in sandwiches/salads and for snacking on its own, while sheep cheeses were often consumed by being incorporated into recipes for various dishes. During data analysis, it was observed that sheep cheeses consumers put a lower importance on taste and texture when compared to goat cheeses.

After completing the surveys, the results were used to identify opportunities that could lead to improve products and increase import displacement.

Respondents care more about their sheep cheese being imported from another country than goat. Additionally, USA is the most preferred country of origin, followed by France and Italy.



A8A. Do you prefer to purchase sheep or goat cheese that is made in and imported from another country? (Please select one response.)
A8B. From which country do you most prefer your sheep or goat cheese from? (Please select one response.)

* Notes statistical significance

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Illinois, Indiana, Iowa, Kansas, Michigan, Minnesota, Missouri, Nebraska, Ohio, South Dakota & Wisconsin

One conclusion is that using the idea of "premium" cheeses may help to increase growth via exports and import displacement. Implications of the study can also be applied through using organic ingredients (including this information on labels) and focusing on texture of the cheeses. Putting attention on these elements may help manufacturers leverage their spot in the U.S. market. Lastly, another application could be to broaden consumers' view of both cheeses to compete with the exported specialty cheeses.

Overall, this study has given valuable insight into consumer behavior and can help DBIA achieve goals in import displacement. Sensory work completed subsequently complements this market intelligence report.

The Vermont-based Dairy Business Initiative also carried out market intelligence (regional based) that aligns with some of the DBIA findings. The Vermont results are linked to via the DBIA website: https://www.cdr.wisc.edu/import-displacement

2. Sensory Panels

Selection of Cheeses

The initial cheese styles were identified based on imported sales volume. These cheeses were identified based on sales volumes, availability, and with input from goat and sheep cheese producers. The cheeses within each style were selected based on their representation of the specific style and availability. In some cases, the original selections were substituted or removed from the testing list due to difficulty of procurement. The cheese styles identified included Manchego, wine-soaked goat cheese, Pecorino Romano, sheep's milk feta, Roquefort, mold ripened goat cheese, ash ripened goat cheese and goat gouda

In total, the DBIA sensory panels evaluated 27 goat and sheep cheeses from around the world across 8 cheese styles. For goat cheese, 12 cheeses were selected and evaluated across 4 sensory panels. For sheep cheese, 15 cheeses were selected and evaluated across 4 sensory panels. In each panel, 1-2 international cheeses were compared to 1-2 domestic versions. The international cheeses are produced in France, Italy, Spain, or Holland. The domestic cheeses are produced in Wisconsin, Vermont, California, or Minnesota. DBIA intentionally did not specify the cheeses evaluated for purposes of confidentiality; any interested cheesemaker should reach out to understand how your products may fit into this evaluation.

Methodology

Samples were presented blind of any branding/identification. Samples were presented in the manner most reported by panelists (i.e., with pairing options on a cheese board or in an application such as pasta). Samples were presented in numerical order and evaluated one at a time. Samples were evaluated by consumer panelists who were regular buyers and consumers of the cheese style. The discussion was guided and moderated by the CDR sensory coordinator and lasted for approximately 1 hour. Specific questions were posed, but feedback was intended to be relatively free form allowing any topic to be addressed at any time. Panelists were recorded both visually and audibly. The session was

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digitally recorded for later review. The session took place in CDR's training auditorium to maximize microphone usage and comfortable seating space. In some instances, the panel was informally polled by

using a "show of hands" for some semi-quantitative data. Most of the feedback received was unstructured and directed towards specific prompt questions.

a. Manchego

Four samples of Manchego were purchased to understand differences between imported versions and domestically produced alternatives. There was not much in the way of brand awareness or loyalty of Manchego. Overall, there was little awareness that domestic alternatives exist. Retail availability may be another barrier for the domestic versions. No local Madison stores carried them and could only be purchased online.

The panel seemed very price conscious in purchasing Manchego, and they were not really willing to pay more for domestic. Some might be willing to pay more if it has better flavor regardless of whether it is domestic or imported.

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Brand imagery was mentioned as important, several panelists mentioned seeing country scenes, animal imagery, suggested uses, and seeing the rind as being important. Domestic versions were more loosely vacuum sealed, while the imported ones were more tightly wrapped. The panelists did not like the look of the bulky vacuum sealed presentation.

There was a stark contrast between how the domestic versions performed when tasted blind, versus after their identity was revealed. There was widespread consensus that the domestic versions met or exceeded expectations for Manchego when it came to flavor/texture/performance. However, when discussing the branding and the topic of domestic vs. imported as a whole, the authenticity of the Spanish import had the upper hand. The packaging and branding were seen as superior and had the cache of an imported cheese including the stamp/seal indicating the protected status. The easy availability at stores like Trader Joe's or Whole Foods was mentioned several times. It was also seen as more exotic, fancy, and/or authentic simply for being imported.

To compete, the two primary aspects are sensory attributes and price. Positively, the two domestic offerings met expectations and were even seen as superior products for various reasons. This suggests domestic producers are already doing a good job delivering the appearance, texture, flavor, and performance of Manchego Cheese. Price remains a hurdle, likely due to the limited amount of sheep's milk available in the US, and small scale of sheep's cheese production compared to Spain. After sensory qualities and price, brand perception/awareness and product availability are important decision-making factors in consumer habits with these cheeses. Domestic cheeses simply cannot win on authenticity, cannot outright use the Manchego name, and are not viewed as "special" when purchased for a party/occasion. And if a cheese cannot be purchased in their local community, it would tend not to be viewed as particularly attractive/local as well. While the authenticity of the imported cheese cannot be matched, it is possible to make the domestic alternatives more widely available and increase brand awareness. This would only make sense though if the domestic product offerings can offer at least parity on price and flavor, if not outright beat the imported offerings.

b. Wine-Soaked Goat

Expectations for the category included a balance of wine and cheese flavors, strong overall flavor impact, and interesting colorations. The term "soaked" was sometimes misunderstood, as it led panelists to believe the color should be more permeated and the wine flavor more prevalent. There was a desire for consumers hearing about the category to want a cheese with color that is more permeated throughout the cheese or color soaked further into the cheese. Finally, the term "goat cheese" was often perceived by default as a soft, spreadable log form of cheese. Throughout the panel, many people expressed that their perception of goat cheese was singularly of soft/spreadable cheese but were pleasantly surprised by the texture of both cheeses presented.

Most panelists reported using this type of cheese either for snacking or for creating a cheeseboard for a party and/or guests. The color was seen as a particularly attractive quality. The visual characteristics are very important. The type of wine was important if someone preferred certain varieties, such as sweet wine, dry wine, or a particular region of origin, etc.

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The consensus on comparing domestic vs. imported on flavor, texture, and performance alone was that they were close and comparable. If they were closer in price, they could be seen as interchangeable. One panelist mentioned being willing to pay a dollar or two extra (per 5oz wedge) to support local/US cheese, while others mentioned that intuitively they would expect and be willing to pay more for the imported option.

Stripped of branding and pricing, the cheeses themselves were ultimately described as close, comparable, and interchangeable. There were enough differences for almost the entire panel to prefer the imported version of the cheese. It was better balanced, a much better vibrant purple colored rind, and had a creamier texture. The main liking driver on the domestic version was simply the intensity of the wine flavor itself.

However, when adding in price and packaging, the close race becomes no contest at all. The packaging and branding of the imported version were also almost unanimously preferred as being more sophisticated and visually more appealing overall. Even members of the group willing to pay a premium for U.S. cheese thought the price difference was more than they might be willing to pay.

Many of the panelists seemed to like the concept of a soft goat cheese log with wine flavor permeating that could be spread on a cracker, both for visual interest and flavor impact, but also as well as better meeting people's expectations for what goat cheese is. People were also really intrigued by the streaky or marbling color throughout the cheese. This might provide guidance for new product development of perhaps a cold pack cheese infused with wine, or a chevre type cheese blended with wine to give a visually appealing product as well as a more intense wine flavor impact.

c. Pecorino Romano

Intense and robust flavor was seen as the main distinction from parmesan, but Pecorino Romano was also perceived as more fancy/sophisticated. Most consumers in this panel saw parmesan as an easy substitute for Pecorino Romano with no one reporting that any dishes they made would absolutely require Pecorino Romano. It was seen more as a general addition to a wide variety of pasta/pizza dishes as an enhancer rather than a critical unique ingredient. When questioning between cow and sheep Romano, there was general agreement that the sheep's milk was noticeably different and preferred flavor wise. Price and availability were cited as the key factors in decision making, but packaging/branding also has a big impact. The consensus was that people are looking for European/Italian branding and feel.

Consumers were willing to pay more for imported cheese overall. The two Wisconsin offerings were not close enough to the imported versions to be considered as viable alternatives. The imported versions gave a sense of authenticity and luxury that the domestic versions needed to replicate or overcome to be seen as superior.

However, it was one of the domestic versions that had the best reaction to its branding. The design was refined, the colors conveyed quality, and the information provided and set expectations and gave

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guidance on how to enjoy the cheese. The cheese itself fell short in the expectations it established for itself, however.

To compete, the two primary aspects are sensory attributes and price. Texture and flavor wise, the offerings from domestic producers were seen as objectively tasty cheeses; however, they missed the mark for a suitable match to the performance of imported Pecorino Romano by a wide margin as perceived by the panel.

The overall impression from the panel on this variety of cheese was that there are a small handful of dishes that specifically require it. However, most participants in this group saw Pecorino Romano as a fancier, more flavorful version of parmesan that was called for when you wanted something different or something to impress guests. Domestic producers will need to call upon that perception of prestige, authenticity, and Italian visuals if they want to directly compete with the imported players. This also suggests that getting the creamy texture and the intense flavor and sheepy notes present in the imported brand for this session is also of utmost importance for competing more effectively. For some domestic brands, investments in updated branding would pay big dividends, especially additional information on expected flavor notes or suggested pairings. Participants genuinely enjoyed the flavor, so this alone may be enough to increase sales. If a closer match to Pecorino Romano is desired, removing the orange hue of color would be a top priority, as well as updating the flavor profile to be closer to Pecorino Romano.

d. Feta

Because of the versatility of feta, there was a wide range of preferences. Feta was very commonly paired and used with salads or breakfast/egg dishes. Some people had misconceptions around whether all feta was sheep's milk or not. Most preferred to buy an intact block of cheese. When it came to included brine, more seemed to enjoy a small amount of brine included versus being completely submerged in brine. A few people preferred pre-crumbled on occasion for the convenience of just opening and using, especially for on salads.

As far as quality expectations, the “ideal” cheese was very dependent on the application. Most saw a moist appearance as being an important quality factor. For function, the cheese needed to be firm enough to crumble well. If it is too soft/sticky, it was viewed as a negative. Most people expected it to soften/melt upon heating. People were much more concerned with price and more willing to interchange various brands/formats.

The consensus when comparing domestic vs. imported on flavor/texture/performance alone was that they were close and comparable. Given that the price was all relatively close, they could be seen as interchangeable. The fact that “feta” does not carry the same protected origin as some other cheeses studied like Manchego or Pecorino Romano suggests that attempts to displace imported volume could be much more successful with feta. Panelists generally responded that “feta is feta” and imported feta was not seen as particularly more fancy, valuable, or authentic.

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Ultimately, when consumers make choices on purchasing, they rely on packaging to relay information and convey quality and expectations. Some stores where cheese may be purchased may allow for taste testing before buying, but generally most feta is likely to be purchased in retail off the shelf, versus cut and wrap type retail. In this regard, the imported brand had a very big hill to climb. The general negative response to the packaging included complaints on the colors/graphics, the branding, the packaging material/style itself, and not including the word feta at all, among others. Most consumers had the sentiment that if they were looking at the store to buy Feta, they likely would never have purchased that offering. Conversely, the cheese itself was the most liked and desired among the three studied.

There may be some changes that could be made to better mimic or replicate the Valbreso characteristics as there did not appear to be a market segment that preferred what the domestic cheeses brought to the table in the market. Some improvements could be made to the branding, but likely the more impactful effort would come from making the cheese more like the imported alternative.

e. Roquefort

The consensus of more regular Roquefort consumers was that the domestic versions were significantly and/or appreciably different enough from authentic Roquefort. This was attributed to either lacking flavor or having flavor differences big enough to separate them. However, others, especially those less familiar with Roquefort, thought that they were “close enough”. When it came to Roquefort specifically, even those who usually are willing to pay more for local were unwilling to do so here. They were willing to pay more to import the genuine cheese since the name Roquefort has exclusivity and value to them.

Roquefort is a protected identity product and can only be called so if made in the region and to the requirements. This gives it an inherent advantage and premium that a domestic offering does not intrinsically have. In lieu of this name, domestic versions could still compete with similar flavor, texture, and/or performance. In this study, the success of matching the characteristics of the imported products were mixed. Overall, more folks tended to agree that the domestic versions were noticeably different when comparing side by side, even if on their own they are enjoyable cheeses.

The domestic versions had two different flaws. One was described simply as lacking the flavor intensity to compete with Roquefort. The other featured flavor notes not seen in the Roquefort, particularly barnyard or fruity type notes.

The advice from the panel was simply to focus on making a delicious and affordable blue cheese that they would want to use when being “Roquefort” was not a requirement. It appears that in this class of cheese, direct competition may not be advised.

f. Soft Mold-Ripened Goat Cheese

There were several known producers or varieties of cheese from the panel before being introduced to the samples. People agreed these are typically used spread on crackers / charcuterie boards or perhaps baked. Most people reported eating the rind with these types of cheeses.

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For this session, the cheese grouping/category was broad and not explicitly defined as far as flavor/appearance/function expectations. This led to a variety of expectations across the group from wanting the goat cheese flavor to come through, to not wanting any hints of blue notes, to wanting a very intense flavor. Because in this case, the imported cheese it not the best known or the definition of the category itself, it did not necessarily wield a significant advantage over the domestic cheeses. Most people were willing to pay about the same between the imported and domestic.

It should be noted that distributors of cheese products hold a great deal of power and influence in how cheeses either retain or degrade their original flavor and appearance based on how they store, cut, package, and ship cheese.

g. Ash Goat Cheese

Not many of the consumers who participated had bought ash-ripened goat cheese as they tend to be very expensive. But many of the participants had sampled them or had them at parties/gatherings. Most liked or were familiar with a line of ash through the cheese.

One very apparent result from this focus group was that this category of cheese is especially niche. Very few of the panelists recruited had even purchased this type of cheese before. So, the results of this focus group may best be viewed as to how to meet the needs of consumers who are interested or curious about this type of cheese and market a product that is interesting, approachable, and hopefully within their budget. For example, many expressed interest in seeing a cheese with ash marbled throughout the cheese. Most of these consumers are most familiar with Chevre and that dictates their expectations for any goat cheese. Therefore, a Chevre-like product with ash incorporated some way may also be appealing to them. Incorporating ash as an ingredient is a way to increase the perceived value of the product without adding a large additional cost.

There was major feedback on the topic of packaging in this session. First and foremost, pairing and flavor notes on the packaging were of importance for these less known or recognizable cheeses. Because people were much less familiar with them, some guidance on what to expect for flavor, texture, and performance were expressed to be very desirable. Additionally, the topics of excessive packaging as well as cheese-appropriate packaging were discussed. The consumers wanted the cheese to use the packaging best suited to preserve and protect the flavor of the cheese with a label that was concise, easy to read, and information dense.

h. Goat Gouda

Most of the panelists were unfamiliar with goat goudas as a concept and could not name/identify any examples or brands prior to introducing them. Panelists were expecting more of an animal/barny, or tangy flavor compared to cow's milk gouda. Some would use it for cooking/baking dishes like Mac and Cheese. Others would use it for cheese boards. This cheese was also viewed as an easy way to introduce artisan cheese to people as being milder and somewhat familiar. Regarding functionality, people

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expected it to both shred and melt well. It was seen as ideally being soft enough to eat easily, but not too dry. People also wanted and expected it to be in a wheel/wedge format.

The overall impression this session gives is that gouda as a category had less panache as an imported cheese. This contrasts with some of the other cheeses studied that were iconic and protected like Pecorino Romano or Roquefort. As such, the domestic offerings have less of an initial deficit to overcome to impress and sway consumers. The higher price of domestic cheeses in this case would be a big deterrent, as the difference in price was quite significant.

Gouda as a category can range from mild to aged, already providing a spectrum of different experiences. This was compounded for what people were wanting from the goat element with some wanting a tangy/barny note to shine through strongly, with others preferring a milder version of the goat flavor. In that respect it makes sense perhaps why opinions were so varied. Texture seemed to be referred to more commonly as reasons for choosing favorites or for enjoying the cheese. While melting/shredding was not explored, this added level of functionality expectation did also seem to take away from the importance of flavor

4. Conclusions

Protected Cheeses

When evaluating this class of cheese, the consensus from the participants was that the protected imported cheese was distinct, unique, and by and large not allowed to be substituted regardless of price or performance of the domestic offerings. Even in cases where flavor or function of the domestic cheese was perceived as superior, the notoriety and authenticity of the protected cheese would win out and be purchased in most cases. The name recognition or brand held a tremendous impact on the buying decision. Being able to impress others with the fanciful and exotic cheeses that were imported was of consideration and simply cannot be replicated by purchasing a domestic “knock off”. Simply the identity of being imported was the primary value perceived.

Due to the above findings, in any case where the cheese is either protected by an international country or well-known and recognized by a specific name, it is not recommended to try to compete directly or imitate it. Direction from the panels to domestic producers of these cheeses was broadly given as this: produce a cheese that is appealing and delicious on its own without trying to copy or imitate the original. As was the case with the three varieties of cheese tasted in this protected classification, domestic producers are already doing a great job of producing a compellingly delicious cheese. There may be opportunities to increase differentiation in the cheese itself, update packaging to reflect those differences, and overall have a more comprehensive marketing strategy of how to position a cheese that will never completely displace the “original”. Price was not really an option to sway consumers here, it was unanimous across these studies that protected cheeses are always able to demand a premium and even if domestic cheeses were similar or better and offered at a significant discount, they simply cannot claim to be the protected cheese.

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Variant Cheeses
Sheep feta and goat gouda were a category somewhere between the protected and general cheeses. They were a well-recognized variety of cheese, but not made using the more common cow's milk as would be typically seen in the U.S. This opens the door for greater opportunities for replacement/substitution for the U.S. consumer. The expectations for these cheeses were broader than with the protected category. For feta specifically, most did not realize that feta in Europe is traditionally made with sheep's milk. Similarly, most did not realize that there were variations of gouda made using goat's milk. This general lack of awareness appears to be one of the biggest opportunities to reveal itself from the entire study. First, because of lack of expectation and awareness, the imported version does not necessarily have an inherent advantage. Secondly the familiarity of an existing variety allows more confident exploration into a goat or sheep variant of a common cow's milk variety. These serve as somewhat of a "gateway" category into getting consumers more familiar with sheep and goat offerings in a cheese that is already somewhat comfortable. For example, a "goat parmesan" or "sheep cheddar" could demand a premium commensurate for the rarer species' milk, but still be approachable for most consumers as a mostly familiar product.

With the overall trend in this category, there are a few things for domestic producers to consider going forward. First, since these cheeses were seen much more interchangeable (for
for example, needing a feta for a salad, rather than needing a specific brand of imported feta), price and branding become some of the biggest factors of concern for the buyer. The product needs to be available at local retailers, it needs to be appealing and stand out on the shelf, and it needs to be priced competitively. Many times, the domestic offerings were moderately to substantially more expensive than the imported versions. These price differences may be driven by things like foreign subsidies / tariffs, higher cost to US producers from smaller goat/sheep milk supplies and less economies of scale, among other things. It was also common to find that many imported cheeses were much more widely available in U.S. retailers with many domestic offerings only available at specialty cheese shops or for purchase online. Increasing the channels of sale, especially outside of e-commerce would be important as most consumers disliked the idea of ordering cheese through online delivery.

Another opportunity for this class of cheeses may be mixed milk cheeses, using a ratio of cow/goat or cow/sheep that imparts some noticeable flavor or textural differences. This would be one approach to both increase the economic viability and lower the price of the cheese and improve the volume of production and distribution. None of the focus groups included mixed-milk cheeses, so further study may be needed on the topic. Additionally, some panelists mentioned personally liking only goat/sheep cheeses for perceived health/digestive benefits, so a mixed milk cheese may not be appealing for that segment of the market.

General Cheeses
This final category of cheese evaluated had the least expectations associated with them. The cheeses themselves tended to be quite varied in texture, appearance, and flavor. In this case the "variety" of cheese was not a specific, recognizable name (cheddar, parmesan, blue), but rather a description of the cheesemaking/ripening process itself. Therefore, the cheese/brand had to essentially make a name for itself. The lack of definition around what the cheese had to be, was somewhat of a double-edged sword.

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The cheese variety or ripening process was less known by consumers, leading to a wide variety of expectations (should ash be outside of the cheese or inside? should it be heavily applied, or lightly applied? what kind of ash? etc.). This made it somewhat intimidating or unapproachable for more conservative consumers, but for more adventurous consumers made it interesting, exotic, and appealing.

The strategy for this category appears to be to create a very compelling and delicious product, and then foster a name/brand that is heavily marketed and becomes distinctive. If there is an existing offering, much like with the protected cheeses, it likely will be difficult to sway existing consumers away from their favorites. Unlike the protected cheeses however, an opportunity likely exists to create something similar and offered at a competitive to lower price to entice consumers to substitute. So, if a product could be produced domestically, perform as good or better, and be priced competitively the chances for substitution are much higher here than with the protected cheeses.

Goat Cheeses

One very large hurdle for any marketing of goat cheese was the prevailing idea or understanding by the consumers in the Madison area that goat cheese is just a soft, tangy cheese in a log shape (basically all goat cheese is Chevre). The narrow association with Chevre as "goat cheese" is prevalent, rather than thinking any variety of cheese could be made with goat's milk. This may require some concerted efforts towards educating and advertising.

Sheep Cheeses

Unlike goat's milk cheeses, sheep's milk cheeses seemed much more widely understood and accepted as much more than just a singular cheese variety. The general perception and expectations were that sheep's milk cheese is much creamier than cow's milk and has a more intense flavor.

Best Practices for Domestic Producers: Packaging

There were a myriad of valuable insights gained over the course of these focus groups. Specific domestic brands were all mentioned many times as having an inherent perception of quality, known for good cheeses. The name and packaging/branding have incredible value, especially if it is applied consistently across their portfolio of products. When possible, these are probably some of the biggest existing advantages in the market. Any ideas or recommendations suggested in this report should always be viewed through the lens of the overall brand first.

Another theme seen across the focus groups was components of cheese packaging that consumers found to be important and appealing. They are summarized below:

- Goat/Sheep identity: The fact that the cheese is made with milk other than cow's milk needs to be concisely and clearly communicated. This could be through text/name or visually using simple sheep/goat imagery or icons. Besides being easily recognized as more premium or exotic, many consumers expressed that sometimes friends or family have certain preferences or dietary restrictions that lead them to seek out goat/sheep cheese specifically. One of the biggest disappointments people had with packaging of the cheeses studied was when it was either confusing or not obvious that it was not cow's milk cheese.

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- Simplistic/clean design: Consumers did not like labels with multiple or hard to read fonts, clashing or washed-out colors, or cluttered panels. A resounding theme was "less is more".
- Flavor Information: Panelists really appreciated cheeses that included descriptions of flavor notes they could expect to see in the cheese. Outside of very well-known products, most consumers felt a product was much more approachable and desirable if they had a sense of what it would taste like. Similarly, ideas or suggestions for what to pair the cheese with were also appreciated. These likely could be included on a rear panel to prevent clutter on the front label.
- Distribution / Retail Labels: Some cheeses are resold at major retailers or through online vendors. Some utilize the cheesemakers provided label, while others choose not to. There was never an instance when a retailer's label was preferred over the cheesemaker's label. The cheesemaker should be aware how each retailer is labeling and presenting their cheese and advocate that the intended label is being used whenever possible. Retailers should also be aware of the impact their labeling choices can have on consumer perception.
- Nutrition Facts: Nutritional facts panels were polarizing for participants. Some insisted they be included, looking for information on things like calories, sodium levels, etc. Others were adamant that cheese is generally consumed as an indulgence and nutrition information was less important. So, a suggested best practice would be to include it on a less prominent part of the package, again to reduce clutter.
- Seeing the Cheese: There were a surprising number of people who made it clear that being able to see the cheese was important to them. This is particularly important for mold ripened cheeses, but also to see things like crystal development, browning, rind thickness, etc. Packaging material and design is a balance of many things, including protecting the flavor, but the consumer perception was that at least a small view or window of the product, or being able to see a larger piece of cheese being cut at the retailer was desirable.
- Awards: A label highlighting the fact that cheese had won an award was consistently seen as helping it stand out from the crowd. For a newer brand or product, an "award winning" cheese gave consumers some confidence in making at least an initial purchase to try it.

A rather unexpected takeaway from the study is the reality of the variety of ways cheese is distributed and sold. The cheese may be pre-cut and packaged and then sold at retail, larger pieces may be shipped to stores and then sliced and packaged on-site before selling, and finally the cheese may be cut to order at a retail establishment and wrapped only after a customer purchases it. Additionally, retailers may affix labels provided with the cheese, or their own labels, or both. These all greatly impact whether a consumer can see the cheese, taste the cheese, or ask questions about the cheese prior to purchase or not. It may also impact the flavor/quality of the cheese greatly. This is further compounded when considering online retailers and the logistics of shipping cheese across the country via couriers. In other words, the retailer has a great deal of influence on how a cheese may be perceived (label choices, storage/age, potential abuse with improper packaging, pricing, etc.). Finally, retail channels also impact

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the reach and availability of a product. Many of the cheeses in the panels were very much enjoyed, but when participants asked where they could be purchased locally, often the answer was only online. Many participants in the groups reported buying their cheeses at retailers like Trader Joe's, Aldi, Costco, and Whole Foods. Being able to distribute to these national retailers is a large hurdle to overcome for many smaller producers of goat and sheep cheese in the United States.

Figure 1. Drunken Goat retailer label (left) and cheesemaker label (right)

Figure 2. Big Woods Blue retailer label (left) and cheesemaker label (right)

Pricing is another big consideration. The primary trend seen was that domestic products were more expensive than imported. As discussed above, pricing parity is less of a concern for the protected cheeses and the general cheeses, and of most importance to the variant cheeses.

To summarize, the prospects for the domestic market of goat and sheep cheeses appear bright. There are seemingly broadly applicable labeling best practices that can make existing cheeses more attractive to consumers in the store. Further exploration should be done on consumer perception of mixed-milk cheeses as a solution for price and scale improvements of domestic goat/sheep milk supply. Leveraging existing popular and recognized cheesemaker brands is an asset. Finally, partnering with, educating, and advocating to retailers will be critical in efforts to increase reach and availability of already popular domestic cheeses.

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