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ARG 1110

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Promoting Canadian Agri-food Exports in Nepal

Exporting Cheese-making supplies from Canada to Nepal

The goal of the project is to help subsistence farmers in Nepal and must be achieved through bilateral trade in agri-food between Canada and Nepal.

Part I: Product Info

Product Description

Local cheese making supplies would include the basics for small scale cheese making (Ogilvy, 1976):

• thermometer	• moulds
• cheese bandage netting	• draining and ripening mats
• cheese draining bag	• cultures
• rennet tablets	

Table 1: List of Basic Supplies

Cheese is formed when rennet separates the milk into curds and whey. The liquid whey is poured away while the solid curds coalesce into a mass and ripen into cheese. Cheese cultures are often added to aid with the coalescing and add flavour. Soft cheeses are not pressed and have a shorter ripening period than pressed cheeses which may require several months to achieve the right degree of ripening (Thear, 1988). Soft cheeses are quick and relatively easy to make, and require little in terms of equipment, unless they are being made for sale (Thear, 1988).

For small scale in addition to the listed item in Table 1, large pots for cooking can be used to heat the milk and for pasteurization. Also some sort of large cutting utensil would be needed to cut the curds. On the market there are also start-up kits for soft goat cheese making. Glengarry Cheesemaking offers a start-up kit which costs CA\$90.00 and contains the supplies in Table 2.

• Soft cheese curd draining bag (10L)	• 60 ml rennet
• stainless steel dairy thermometer	• 60 ml calcium chloride
• 2 ripening mats	• P. candidum white mould powder
• 6 goat cheese moulds	• P. roqueforti blue mould powder
• mesophilic aroma B & mesophilic type II	• Recipes

Table 2: Items in Soft Cheese-making Kit from Glengarry Cheesemaking

Description of where the product is manufactured

Due to the nature of cheese making and the amount of supplies needed, the products originate from across the globe. Table 3 gives a sense of where the products originate.

Description	Origin
Floating dairy thermometer	Germany
Cheese bandage netting, 40" x 40"	USA
Cheese draining bag, 25 litres	Canada
Rennet tablets, 20 tablets (strength 1 tablet/ 25 L milk)	Columbia
Brosse style mould 4", suitable for soft cheese and gouda style (11.5 x 8 x 9.5 cm / 4.5 x 3.25 x 4 in)	France
Draining and Ripening mats	France
Mesophilic aroma type B, 10 dose format	Canada

Table 3: Origin of Cheese-making supplies (Peters, 2014)

Labour required and cost and issues

Cheese making can be a seasonally industry since goats tend to kid in the spring and then produce milk for up of 365 days; the average goat produces milk for 305 days (Belanger & Thomson Bredesen, 2010). The two months which the goat is not producing milk, cheese cannot be made either. There are methods available to achieve almost continuous milk supplies, but this would involve a more sophisticated farm set-up than most Nepalese farmers can afford. Light affects the breeding pattern in goat, shorter days means the goat will be in heat (ready to breed), thus in North America farmers are experimenting with artificial light in the attempt to stimulate the change in seasons.

Inputs required

Inputs would begin with increase the number of dairy goat farms in Nepal, as well as potentially importing dairy goats to Nepal. This would resolve the issue of the limited goat milk supply and increase the productivity of already existing dairy goat herds. The following input would involve building a sanitary facility to manufacture the cheese. This could be a simple cement shed, which can be easily

washed, and disinfected to ensure food safety. The cheese making facility should also include a location to age the cheese, especially if the producer wants to make hard cheese. Cheese can be aged in cave, for example Francois Driard ages his cheese in deep caves to aid the taste (Magnier, 2011), or a classic aging cellar could be built. Depending on the size of the cheese processing facility, electricity would be necessary. To a certain amount, the milk could be heated on a wood stove, the capacity depending on the size of the pot and stove. In conclusion, lots of inputs are necessary, but each one would also benefit Nepal in some way.

Health or nutritional information associated with the product

1-cup	Goat	Cow
Fat	10 g	8g
Saturated Fat	33%	23%
Riboflavin	20%	24%
Calcium	33%	28%
Magnesium	9%	6%
Potassium	14%	9%
Vitamin C	5%	0%
Protein	9 g	8g
Vitamin B-12	2.8%	18%
Folate	1%	3%
Vitamin A	10%	8%
Vitamin D	31%	31%
Selenium	5%	13%
Cholesterol	9%	8%

Table 4: Goat vs Cow milk components (Gamble, Ellis, & Besley, 1939)

Goat milk has some unique characteristics that may make more appealing than cow milk. Some 90% of the Asian population is lactose intolerant or sensitive (Lactose intolerance, 1991). By processing the milk into cheese it reduces the amount of lactose due to the fermentation process, making it easier to digest (Gamble, Ellis & Besley, 1939). Another difference between cow and goat milk is illustrated Table 4. One detail to highlight is that Vitamin A is much greater in goat's milk. This could be beneficial in the campaign to reduce malnutrition in Nepal because Vitamin A is an essential micronutrient and helps control infection

(Reece et al., 2012). Plus it is critical in the production of eye pigments, thus a deficiency can also cause blindness.

Patent/intellectual property constraints

Currently no information has been provided about the patent/intellectual property constraints for each individual item. Several companies manufacture each of the products, thus it would be assumed that either the patents have expired, do not exist, or patent holder shares information with other manufactures. For example several companies produce draining mats, only differences, if any at all, included the type of material used and the density of the weaving/holes.

Evaluation of the Market Opportunity

At first glance, goat cheese making would seem impossible in Nepal. In an interview for *LA Times* a Katmandu homemaker, whose family lives on \$275 a month, stated, "We wouldn't buy that kind of cheese, it's expensive, and the money is better spent on clothes, food, education, basic necessities" (Magnier, 2011). Nonetheless, Nepal sees many foreigners pass through as trekkers or adventure seekers. These trekkers come mostly from developed countries, thus are the main consumers of cheese in Nepal.

To continue, cheese is nothing new in Nepal; there is one kind of cheese, called Chhurpi, which is a dried smoked cheese eaten in the Eastern Himalayas. It is made from the milk of a yak or a hybrid of yak and cattle (Tamang, 2010). Plus there are a few modern pioneers of cheese making hidden in the Himalayas. Frenchman Francois, the Italian Sandro, Sandra Subedi from Pokhara, and Ashok from Chitlang have helped Nepal come a long way as far as quality cheese production is concerned (Luckson, 2013). After receiving training from France, Ashok started manufacturing goat cheese for the first time in Nepal in 2003. He makes almost 5-7 kilos of cheese a day from a herd of 70 goats (Harari, 2011). Also, Ashok is interested in helping and training others in Nepal who are keen about cheese making (Harari, 2011).

On a different note, Swiss cheese specialist Jean Paul Corboz raves that, "Nepal has perfect conditions for it to develop as a cheese producer. It has the right climatic conditions, the grasslands and people who are traditionally into animal husbandry. You couldn't ask for more" (Mathema & Basnyat, 2008). The European Alps have a well-established cheese market, so learning that the Swiss too see potential in Nepal means a lot.

More recent info from Ashok, confirm that cheese is still in demand, especially by foreigners (Thakuri, 2014). In addition, Ashok shared that the demand is unable to be fulfilled due to the limited access to goat's milk. All the milk processed by the Chitlang Cheese Factory comes from the herd Ashok established through collecting locally bred goats (Thakuri, 2014). Moreover, this method of creating a dairy goat herd is very difficult because according to the book *Goats of the World*, goats in Nepal are moderate body size, with a slow growth rate and limited milking abilities. Due to the variety of climates found in Nepal, there is a variety of goat breeds adapted to each of these climates. So the focus for breeding was the adaptation to local diseases and the environment, with little emphasis in productivity (Porter, 1996). This is no surprise, since without access to a veterinarian a farmer is better off selecting from the goats that have adapted best to the climate than gambling with the chance of higher productivity, but less immunity.

Benefits to Canada

The benefits to Canada are very mostly indirect since the origins of the supplies are very diverse.

To provide the supplies needed for cheese making, Glengarry cheese making would be a suitable Canadian company. The privately owned business in Lancaster, Ontario, currently functions with 11 employees (Peters, 2014). They offer competitive prices and their inventory originates from across the globe to offer exceptional quality. Exporting cheese making supplies would increase the sales of the company which could result in more jobs, and more revenue.

Biena is a Canadian company which manufactures cheese cultures, located in St. Hyacinthe, Quebec (Biena, 2014). In the sample shipment order their product: "Mesophile Aromatic Type B" is included. Exporting cheese culture made by Biena supports that company by increasing demand, thus allowing the company to increase productivity, income, and employment. Another Canada-made product is the draining bag; however the exact manufacturing details are unavailable at this time.

To get the supplies to Nepal DHL express would be suitable since it supports jobs in Canada and has a broad global shipping network. DHL's claim to fame includes that they have a global network in over 220 countries and territories, and that they are the most international company in the world allowing them to "offer solutions for an almost infinite number of logistics needs" (DHL, 2014). Their current workforce has reached close to 315,000 employees (DHL, 2014). DHL will likely not expand from exporting this product; however it will aid in the continuation of the company supporting jobs in Canada.

Environmental sustainability in growing/manufacturing in Canada

Since cheese moulds are made from plastic, there is potential to manufacture the moulds in Canada.

Custom plastics manufacturer, such as Free Form Plastics which has experience manufacturing moulds, but not specially cheese, could be used in the future (Free Form Plastics, 2014).

<p>Free Form Plastics Box 159 St. Brieux, Saskatchewan, Canada S0K 3V0 Tel: 306-275-2155 Email: sales@freeformplastics.com</p>	
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Table 5: Contact Information for Free Form Plastics

Part II- Export potential to Nepal

Transport logistics

Although DHL would not release specific transport logistics (DHL, 2014), a rough outline has been created from sources offered by their website. Since the shipments would be relatively light medium sized, air transportation would be the most likely method of transportation. The product would be sent from Lancaster to Montreal, the closest DHL distributing location. From there the shipment would travel by air to Kathmandu, Nepal. In this process there could be a layover in Hong Kong. Also if a very large shipment is ordered (the size of a small container or larger) the shipment would need to travel by truck and ship to India (DHL, 2013). DHL Express is a reputable shipping company, thus reliability should not be an issue; reliability is key during the development of an export market (Lall, 1991). Overall the cost of shipping a medium sized service box (type C) from Lancaster, ON to Katmandu, Nepal is CA\$125.00 (Peters, 2014). For a visual representation of the transports logistics refer to Figure 1.

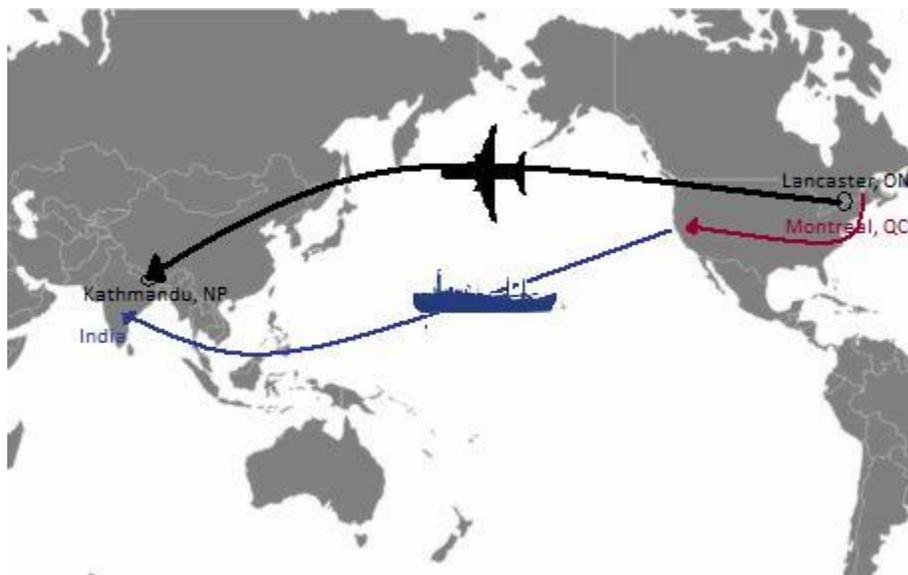


Figure 1: Shipping Logistics from Canada to Nepal using DHL Express

Storage/refrigeration issues from post-production to market

Cheese would need to be storage in caves or a temperature controlled ageing room. Soft cheese has a shorter life span than hard cheese, thus storage would need to be large enough for hard cheese and the right climate for soft cheese.

Cost analysis to achieve profitability

A quote provided by Glengarry cheese making, in Table 6, estimates the cost would be \$1783.65 CAN to export supplies for at least five farmers or small facilities. This is a very steep price for farmers that on average make \$825 CAN (FAO, 2014). If the proposed inputs and funding are met, then cheese making has a bright future in Nepal. Otherwise for a single farmer to make some artisan cheese on his/her farm, this would not be cost effective.

Description	Rate/unit (\$ CAN)	# of units	Amount (\$ CAN)
Floating diary thermometer	19.95	5	99.75
Cheese bandage netting, 40" x 40"	2.25	5	11.25
Cheese draining bag, 25 litres	33.95	5	169.75
Rennet tablets, 20 tablets (strength 1 tablet/ 25 L milk)	13.95	2	27.90
Brosse style mould 4", suitable for soft cheese and gouda style	4.95	150	742.50
Draining and Ripening mats	3.00	50	150.00
Mesophilic aroma type B, 10 dose format	33.25	10	332.50
Total			<u>1533.65</u>
Shipping	125.00	2	250.00
Total+Shipping			<u>1783.65</u>

Table 6: Cost Estimates of Products and Shipping

Needs and benefits to the importing nation

Cheesing making would benefit the entire Nepalese village since it can be used as an attraction for tourists trekking through the mountains. Ashok for example hosts tours of his factory and charges a small fee (Harari, 2011). As for the cheese, Ashok charges 1500 rupees/kg for the soft variety and hard cheese is sold for 2500 rupees/kg (Thakuri, 2014). Cheese for a Nepalese farmer would be treated as a delicacy since it is relatively expensive compared to other food, however for American standards it's

cheap. Other markets would include selling the cheese to restaurants and hotel's in larger neighbouring cities.

Cheese making would also benefit Nepal by exploiting the goat and cheese industry which has benefits of its own. Goats are relatively easy to manage and adapt to their environment. Their size and ability to be herded makes them suitable to farm in a mountainous country like Nepal. Additionally, farmers would have access to a larger variety of options as far as farming in concerned. By opening the goat market, farmers who may not have enjoyed their current lifestyle, would have the chance to try something new.

Furthermore it would support the jobs of people who transport and sell goods in Nepal. The cheese making supplies would in turn produce cheese, which is another item that needs marketing. Cheese factories employ people to make the cheese and then sell and transport the cheese across the country. The cooperative would employ farmers to supply the milk for the cheese. To summarize this: there would be lot of opportunities to create jobs in Nepal through the introduction of cheese making.

Contact info of Canadian companies and potential Nepalese buyers

<p>Glengarry Cheesemaking Inc. 5926 County Road 34, P.O Box 190 Lancaster, Ontario. K0C 1N0. Canada Tel: 613-347-1141 website: www.glengarrycheesemaking.on.ca</p>	<p>Chitlang Goat Cheese Factory Chitlang, Nepal Tel: 984125292 Tel: 984502137 Email: nepaldairygoat456@gmail.com</p>
<p>Lakhey Traders Wholesale & Supply Store Chabahil Kathmandu, Nepal Tel: +977 984-1208813</p>	<p>Drivetech International P. Ltd. 216 Dhapasi Heights Dhapasi Gha-4 Kathmandu, Nepal Tel: +977-1-44373666</p>

Table 7: Contact Info for Canadian Company and potential Nepalese buyers

Sales/marketing strategy to sell in Nepal

There are several obstacles that need to be overcome for this project to be successful, which are noted under "Inputs". If the lack of dairy goats is resolved, then the following steps would be set forth.

To begin, to assess the actual demand for cheese making products, advertising would be necessary to broadcast the idea to as many farmers as possible. See as how difficult it was to reach Ashok, a Nepalese farmer, it would be difficult for news about this product to travel around to individual farms. Thus the focus on creating cooperatives would be ideal. Also a method similar to door-door sales would be viable. For the farmers who have access to internet, Glengarry Cheesemaking has an easy to navigate website farmers could use, plus they have an extensive variety of equipment and supplies.

A report on consumer habits in developing countries points out that citizens are more inclined to purchase domestic products (Wang & Chen, 2004). Hence use of already existing whole sale retailers to sell the cheese making supplies would be necessary. When the supplies arrive in Nepal, most likely in Katmandu by plane, it would be transported to any participating shops or retailers in Katmandu.

Furthermore, creating a cooperative and pooling the resources of interested farmers would be a more realistic approach for starting to make cheese. Since cheese making is not a simple process and involves a lot of resources it may be expensive for an individual cheese-maker. Using a cooperative approach to cheese making has several advantages:

- Ensures that cheese making is continued in the village in case one farmer is no longer to support himself.
- Having another individual to make the cheese rather than the farmer, would exploit the goat industry because there would be an opportunity for the farmer to sell their milk. Currently there is no real purpose to have goats since there is no market.
- And if all else fails, the equipment can be used to process cow milk

Since 1969, there has been a principle organization for dairy development in Nepal, the Dairy Development Corporation (DDC) (Uotila, & Dhanapala, n.d). From this small groups between farmers were formed to chip the milk to DDC-run cooling centres. In order to coordinate private - and public-sector dairy development, the National Dairy Development Board (NDDB) was created. The intentions of the board include organizing the small groups and educating them on their “rights, obligations and management discipline,” plus introducing the fundamentals of co-operatives (Uotila, & Dhanapala, n.d). Based on this there should be resources already available to aid with the development for goat cheese making co-ops.

Import/export documentation details

For exporting Nepal, the regulations for India are used, and the information is run through the office in New Delhi. The New Delhi Office was unable to provide information about export/import documentation, at this step in the project. Pratima Rai Bakshi from Trade Services in New Delhi recommended contacting Export Development Canada and then when the research is complete, submitting it to Trade Commissioner Service in New Delhi (Bakshi, 2014). Further contacting information can be found in table 8.

<p>Trade Commissioner Service in New Delhi 7/8 Shantipath, Chanakyapuri. New Delhi, 110021 India Tel: +911141782000 E-Mail: india.commerce@international.gc.ca</p>	<p>Trade commissioners of the Regional Offices of Foreign Affairs, Trade and Development Canada Tel: 1-888-306-9991</p>	<p>Export Development Canada 150 Slater Street Ottawa, ON K1A 1K3 Tel: 1-800-229-0575</p>
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Table 8: Contacts for more info about Exporting Permits

Trade/subsidy barriers

This is not really a product that needs to be subsidized. The product would not directly benefit a large population, in comparison to grain or vaccines which are needed by a much larger population. There are no known trade barriers for cheese making supplies. There was actually an initiative to promote cheese making in Nepal. Heifer International launched \$23.8 million project in Nepal in 2012 and aims to assist 138,000 small-scale farmers. Their main focus is on the goat and dairy industry to reduce Nepal's reliance on imported protein sources (Heifer International, 2012). Therefore, there should be no trade barriers and are unlikely to be applied to the cheese making supplies by Canada.

Canadian government or international loan/grants programs

The World Bank creates programs to help improve certain areas. This would take a long time, however, it is a much larger cooperation, thus has more spending power. Project for Agriculture

Commercialization and Trade (PACT) is an active project that aims to invest 20.0 million USD into the Ministry of Agriculture and Cooperatives from the Government of Nepal (The World Bank, 2014).

Another grant came through in 2012 of 40.0 million USD. "The objective of the additional financing is to improve the competitiveness of smallholder farmers and the agribusiness sector in selected commodity value chains supported by the project" (The World Bank, 2014).

The International Fund for Agricultural Development (IFAD), a specialized agency of the United Nations, was established to finance agricultural development projects primarily for food production in the developing countries (IFAD, 2014). The organization has a representative in Nepal to help coordinate projects directly involving Nepal. In their most recent report, IFAD noted that 1,080 million USD have been invested in Nepal from 2006-2011 to help combat poverty and aid farmers (IFAD, 2013).

Additionally, the Canadian Government offers a few grant programs that could fund the implantation of this product. The most suitable would be "Sustainable Livelihoods through Co-operatives," since it

would not only help fund the start up of a co-op, but also provide to aid with human resource development, governance training, business planning, marketing training, and technical assistance (Foreign Affairs, Trade and Development Canada, 2014).

<p>Mr Bashu Aryal (International Fund for Agricultural Development) Country Presence Officer c/o World Food Programme Chakupat, Patan Dhoka Road Lalitpur Kathmandu - Nepal E-mail: b.aryal@ifad.org E-mail: bashuaryal@wlink.com.np Tel: +977 1 526 0607 ext 4144</p>	<p>Canadian Co-operative Association 400-275 Bank St Ottawa, ON K2P 2L6 Tel: 613-238-6711</p>	<p>The World Bank 1818 H Street, NW USA Washington, DC 20433 Tel: (202) 473-1000</p>
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Table 9: Contacts for more Info about Funds/Grants Available in Nepal

Evaluation of regional and global competition

India manufactures cheese making equipment for greater quantities of processing. These products range from \$1,000-20,000 USD (Jaya Industries, 2014). The Jaya Industries is among the suppliers of cheese making equipment in India and offers several products including those in Table 10.

<ul style="list-style-type: none"> • Chees Vats 	<ul style="list-style-type: none"> • Cheese Slicer
<ul style="list-style-type: none"> • Cutting knives 	<ul style="list-style-type: none"> • Cheese Packing Machine
<ul style="list-style-type: none"> • Cheese Moulds 	<ul style="list-style-type: none"> • Cheese Ripening Chamber
<ul style="list-style-type: none"> • Cheese Press 	<ul style="list-style-type: none"> • Plate Heat Exchangers for heating & cooling milk.

Table 10: Products supplied by Jaya Industries in India

Future studies required to properly evaluate the export potential

First concern to mention is the time needed to properly execute this project. With the number people needed to coordinate, there are several limitations. Also the difficulty to contact and communicate with individuals from Nepal must be noted. The most valuable communication method used was email, however this can be slow in terms of response delay. For the project some individual that may have provided key information either declined to help or never responded to requests. With more time a wider range of contacts could have been used to receive more information and create a more detailed report.

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