



Vermont Maple Sugar Makers' Association

P.O. Box 662, Lyndonville VT 05851

Phone: 802-777-2667

www.VermontMaple.org

January 12, 2024

Testimony for House Committee on Agriculture, Food Resiliency, and Forestry

James Buck, VMSMA Board Chair and Washington County Maple Producer

Allison Hope, VMSMA Executive Director

Who is Vermont Maple?

Chances are if you're a Vermonter, you have visited a sugar house in the springtime and know someone who makes maple syrup (if it isn't already a part of your family history). The Vermont Maple Sugar Makers' Association represents a large swath of sugar makers – large and small – and shares educational opportunities and information widely beyond our membership. We partner with other maple producing states, the North American Maple Syrup Council, the International Maple Syrup Institute, UVM Extension (and other state extensions), Cornell, Proctor Maple Research Center, Vermont Audubon, Vermont Fresh Network, other food and beverage associations, along with Vermont's Agency of Agriculture, Food & Markets and other state departments.

Our strategic plans are both consumer-facing and producer-facing in our work with a focus on engagement, education and marketing that focuses on best practices, quality, and conservation. Over the years, the industry has grown in ways that benefit Vermonters, our working landscape and the environment. Maple production exists in a unique space, that is both agriculture and forestry. Producers are industrious and innovative and continue to employ new technology and best practices to improve quality, forest health and their carbon footprints. Sugar makers have to wear many hats and have an in depth knowledge of business operations; forestry; equipment repair and maintenance; the science and engineering of tubing systems and related innovations (RO, vacuum systems, leak detection systems, etc.); soil science; water and road systems management; food safety; sugarhouse and sugar woods design; and much more. The "how" of sugaring may look different than in the past, but our sugar makers still lead the nation in terms of quality and passion.

State of the Maple Economy

No one has a firm answer to how many sugar makers there are in the state of Vermont. Educated guesses range from 1,800 to over 3,000, with the truth probably closer to 3,000. USDA's next Census of Agriculture report (reflecting 2022 data) will be released in February. The 2017 Census reports 1,411 farms in Vermont with maple syrup sales, which like many federal numbers relating to maple production, appears to be a significant undercount.

The USDA's crop report for maple in 2023 shows a production of 2.045 million gallons, or about 50% of the US production. (2023 US production was reported as 4.179 million gallons). Vermont's reported 2023 production represents a 20% decrease from 2022, but a 17% increase over 2021. It's important to note that these numbers are widely regarded as an undercount of production.

Vermont's sugaring industry is a major economic engine, especially when you include equipment manufacturers and dealers, container dealers, organic certifiers, businesses who sell sap only, and

Vermont Maple...the Official Flavor of Vermont!



Vermont Maple Sugar Makers' Association

P.O. Box 662, Lyndonville VT 05851
 Phone: 802-777-2667
www.VermontMaple.org

others who contribute anywhere in the entire process – from maintaining a healthy sugarbush all the way to packaging the finished product.

Vermont, along with other maple producing states, has been working closely with the National Agricultural Statistics Service to improve the maple crop survey – the timing of the survey and the questions asked – in order to ensure we have more accurate data. The general consensus is that maple is undercounted and represents a larger market in Vermont than the data currently represents.

In 2015, VMSMA commissioned a study from UVM's Center for Rural Studies on "The Economic Contribution of the Vermont Maple Industry". Much of the data, like the NASS crop data, was based on surveys. So at this point it's a bit dated and most likely well undercounts the economic impact. In their scenario with 1800 producers (of which the state has many more), they reported the following:

...for every dollar in sales in the maple industry another \$0.48 in sales was generated in the local economy. The value added multiplier is \$1.70 meaning that for every dollar generated by the maple industry in wage, profit or dividends another \$0.70 is added. Last, the employment multiplier is 1.22 and for every job in the maple industry another 0.22 jobs are supported.

Even with numbers that undercount producers and data that is now a decade old, the total impact reported was about \$330 million annually.

Maple is growing in the state – which means more jobs across a variety of sectors in agriculture and forestry. Our goal is to increase the success of Vermont's sugar makers, create space for more to enter the industry and continue to ensure that we're offering the highest quality, best pure maple products in the world.

We continue to understand that federal reporting numbers are generally an undercount of maple producers. For that reason, we tend to review these numbers for information about the trajectory of the industry, rather than an accurate count of the overall current numbers. What does this trajectory look like (NASS data)? In the last 30 years, Vermont has reported a 348% increase in production of maple syrup. At the same time, we have experienced an increase in the number of taps and the yield per tap.

Production Year	US Totals (gal)	VT Totals (gal)	VT % of US	Inc/(Dec)
1992	1,641,000	570,000	35%	
2002	1,475,000	290,000	20%	(51%)
2012	2,276,000	999,000	44%	244%
2022	4,943,000	2,554,000	52%	156%

Vermont Maple...the Official Flavor of Vermont!



Vermont Maple Sugar Makers' Association

P.O. Box 662, Lyndonville VT 05851

Phone: 802-777-2667

www.VermontMaple.org

2024 Project/Goal Highlights

The overarching theme of our future goals is knowledge and capacity. Vermont leads the industry not just in production, but also in technical expertise. Continuing in this leadership role means investment in the areas of knowledge and capacity – with sugar makers, at the state level and for consumers.

Quality & Food Safety: VMSMA has the most robust (and perhaps the only) Sugarhouse Certification Program in the country based on the latest food safety regulations as they relate to maple production. As an added incentive, we were awarded a federal earmark through Senator Leahy's office that has allowed us to create a grant program to partner with Certification. Sugar makers who need operational upgrades to meet the Certification Criteria are eligible for grants up to \$15,000 to make those changes.

VMSMA offers a wide variety of educational opportunities for producers throughout the year—through on-farm sessions, our annual winter conference, and partnerships with national and state organizations.

Marketing: VMSMA has several grants (both Working Lands and Specialty Crop Block Grants) to market maple to regional consumers.

- **Maple Meander.** Last year, we launched the “Maple Meander”, a passport program that encourages year-round agritourism for maple producers
- **Maple It Up!** We just completed a two year online marketing campaign to highlight maple syrup as a pantry staple. During the pandemic, more folks started cooking meals at home and were reintroduced to maple as a comfort food (and for more than just pancakes). Sales of Vermont maple are strong and we want to continue to ensure that folks keep us in their fridge and ready for any recipe.

Containers: VMSMA and maple producers around the country have had difficulty sourcing plastic retail containers for years. This issue was exacerbated by the pandemic and supply chain interruptions. The plastic container of choice for many Vermont sugar makers is the Sugarhill plastic container coated with a patented XL coating that offers an oxygen barrier. This keeps the syrup in spec for color, based on Vermont's regulations. Since the onset of the pandemic, we're no longer able to source containers with the XL coating. And, in general, we continue to be at a disadvantage in the retail market with a lack of consistent and timely supply of labeled Sugarhill containers.

Through a grant and some local partnerships, we have planned to shift container labeling from our out-of-state container manufacturer to an in-state partner right here in Montpelier, Vermont Evaporator Company. Kate and her team are trained and ready to accept and label shipments of Sugarhill containers for our members. While we have not yet availed ourselves of this service, we will

Vermont Maple...the Official Flavor of Vermont!



Vermont Maple Sugar Makers' Association

P.O. Box 662, Lyndonville VT 05851

Phone: 802-777-2667

www.VermontMaple.org

plan to work with producers who create their own private labels and work with them to capture economies of scale with this type of work.

Initially, maple syrup was packed in metal or glass. Plastic containers arrived in the late 1950s and have become commonplace packaging since that time for a variety of reasons. And while a variety of private companies have created some interesting maple syrup packaging - a spray bottle, plastic pouches with twist caps and even a bag in a box - the vast majority of pure maple syrup on retail shelves is sold in HDPE plastic containers. Maple syrup is overdue for a conversation about packaging innovation that takes into account all of the industry and consumer needs - e.g., hot pack capability, food safe, consumer-friendly, eco-friendly, ease of producer use, etc.

This spring, VMSMA plans to apply for a USDA Acer Access and Development Program Grant to fund initial research into maple syrup retail packaging. If successful, this grant will allow Vermont to partner with other maple producing states to learn what is possible for maple retail packaging that benefits both consumers and producers. We plan to partner with VAAF on this application (as we're not eligible to directly apply for Acer funding) - VMSMA will complete the application and VAAF would submit it on VMSMA's behalf. We anticipate, if successful, that VMSMA will be responsible for the grant work and VAAF will receive some administrative funding for their participation.

Long-term Goals

Our long term goals for Vermont's sugar makers include the following:

- Ensure that Vermont's sugar makers have the tools and access to technical expertise that they need to thrive and continue to be great stewards of our working lands;
- That they continue to make the best pure maple products of the highest quality following all food safety regulations and best practices;
- Continue to have growing and viable markets for their products with options for diversification and value-added products;
- Are able to make a living from sugaring if they choose to;
- That VMSMA partners to lower the barriers to access to entering the industry;
- State-level technical assistance and partnership is readily available from various partners, including VAAF and UVM Extension;
- Sugar makers continue to be involved in collaborating on long-term strategic planning for the future of the industry.

Challenges & Opportunities

- **Capacity and funding.** VMSMA is a lean non-profit member association (dating back to 1893) with an eye toward offering the most impactful work for Vermont's producers with highly-qualified staff at an affordable cost. We employ two year-round, 30 hour per week, salaried staff paid through the VMSMA budget and one year-round 16 hour per week staff

Vermont Maple...the Official Flavor of Vermont!



Vermont Maple Sugar Makers' Association

P.O. Box 662, Lyndonville VT 05851

Phone: 802-777-2667

www.VermontMaple.org

paid through the federal earmark. The majority of our income is raised through net revenue from Big E booth sales and membership dues. Additional income comes through competitive grants and are generally related to specific initiatives and do not fund the ongoing costs of the Association. As the industry grows, the technical resources available through the state and UVM Extension have either shrunk or remained stagnant. In contrast, New York producers receive direct annual funding (to their member association) from their state agency to support ongoing education and marketing work (both consumer and producer-facing).

- **Technical Expertise.** The Vermont maple industry has grown significantly in the last three decades, with an almost 350% increase in production. Our industry reflects more producers (at all sizes), more taps and more production, and less technical assistance at the state level.

All of Vermont's sugar makers, large and small, trade on the Vermont brand collectively. It's difficult for any individual producer or packager to protect the brand. And this is why we continue to propose a dedicated maple technical expert housed within the Agency of Ag to support the entire maple industry, not just for retail inspection but for partnership with UVM Extension, Proctor and VMSMA to ensure that Vermont's sugar makers continue to hold our industry to the highest standards and back it up with support and assistance. An investment in this expertise is necessary for the continued health and growth of the maple industry.

What does a technical maple expert look like at the state level? Here are some initials expectations of such a position:

- Field questions from sugar makers on specific production techniques;
- Understand the research available and best practices;
- Has high-level proficiency of maple-related food safety regulations and FDA requirements;
- Engage in conversations with other state agencies (forestry, transportation, commerce & community development, etc.) about emerging maple issues. Maple straddles the worlds of agriculture and forestry and that offers specific complexities that need technical expertise at the table;
- Collaborate in conservation and preservation conversations. Sugar makers have obvious incentives to steward their woodlands and a state-level technical expert will be a partner in continuing to ensure that our northern hardwood forests remain intact.
- Inform the maple marketing work that the Agency of Ag offers through Acer grants to ensure that best practices are part of the perspective;

Vermont Maple...the Official Flavor of Vermont!



Vermont Maple Sugar Makers' Association

P.O. Box 662, Lyndonville VT 05851

Phone: 802-777-2667

www.VermontMaple.org

- Act as a strategic partner to the maple industry through collaborative partnerships

Maple has changed and innovated over the years – with tubing, vacuum, new taps, RO, infused and value-added products – and the industry's long-term viability is certainly a function of these innovations. With climate change and a tough labor market, these innovations will need to continue. How does the state continue to be a partner in developing, supporting and protecting the industry unless there's a high level of knowledge capacity at the state level.

Vermont Maple has grown production over 350% in thirty years and we have less personnel support at the state level than we've ever had in the past. It's time to support the expanding future of Vermont maple and this sector of our working landscape at a technical level to ensure we continue to offer the best maple products worldwide.

- **Labor & Business Succession Planning & the Next Generation.** Maple is no different from other agricultural and forestry enterprises in Vermont. Producers often struggle to find quality employees for seasonal or year-round work for successful seasons. Many farmers are aging out of this type of work and looking to the next generation to take over existing businesses.

Training younger generations is an important part of the solution - through maple and forestry programs at statewide technical centers. Because of the localized and diffuse nature of funding these programs, they are often under-resourced.

- **Proctor Maple Research Center.** UVM's Proctor Maple Research Center (PMRC), in its 75 year history, has created research that benefits Vermont maple producers and the entire industry across Canada and the United States. For the last 26 years, PMRC has been under the leadership of Dr. Tim Perkins, who worked with Dr. Abby van den Berg for about 20 of those 26 years. These two professionals, collaboratively, have worked on research related to tree health and operational efficiency to become two of the most trusted resources in the industry. And recently, they have both left their leadership roles at PMRC.

In the wake of this leadership void, VMSMA and other industry associations have advocated for UVM to expand capacity at PMRC. PMRC is an incredible asset for Vermont and the maple industry. UVM can continue to value this important resource through the creation of positions that are funded through the UVM budget, rather than grant funding. UVM leadership appears to be working on this goal and we anticipate that a new scientific director could be in place in 12-18 months.

Vermont Maple...the Official Flavor of Vermont!



Vermont Maple Sugar Makers' Association

P.O. Box 662, Lyndonville VT 05851

Phone: 802-777-2667

www.VermontMaple.org

Maple, like many other agriculture enterprises, is capital intensive and start-up costs for land and equipment are often a barrier for new businesses. The long-term nature of the crop and the short season (which still requires year-round work) means that income can vary greatly from year to year. The recent round of agricultural development grants clearly show an unmet need in the industry. We envision a future where Vermont makes a firm commitment to support this portion of our agricultural economy with appropriate fixed funding and technical support to support continued growth and high-quality production.

Vermont Maple...the Official Flavor of Vermont!