



Vermont Maple Sugar Makers' Association

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

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An Update on Vermont Maple

Thank you for having us back for a conversation following up on the 2024 maple season. We hope some of you were able to visit sugar makers in your district during our statewide Maple Open House Weekend (or anytime during the season). The first day of Open House Weekend on Saturday 3/23, Mother Nature offered up a spring snowstorm, but folks still made it out and the crowds continued through Sunday. We had a much smaller group follow up that first weekend with a “take two” on Saturday 3/30 with some good crowds and connections made as well. Overall, we had 105 locations open in all areas of the state, fielded innumerable phone calls and emails from consumers who were planning to travel to the state for the event.

We're looking forward to reviewing data from the recent Maple Agricultural Development grant applications to understand unmet needs in the Vermont maple industry. According to notes from the Agency of Agriculture, Food and Markets, the grant program received a record breaking 352 grant applications (331 considered complete and eligible) requesting over \$18 million in funding. About 11 of these applications are being funded at just under \$550,000 and we hope to receive a final list from the Agency in the near future. We look forward to working with the Agency to use the data from these applications (without personally identifying information) to better understand how they represent unmet needs across the industry in the areas of food safety, climate resiliency, operational efficiency and much more.

For now, we can share some notes on the 2024 season. The overarching message is that, in general, sugar makers had a very good crop year across the state. Great news! During the pandemic, pure maple syrup sales increased rather significantly - more folks were cooking at home and reaching for comfort foods like maple as a kitchen staple. A good production year allows Vermont to meet the demand and work to stay on a growth trajectory.

Many sugar makers are reporting crops that are well above average; by the same token, some are reporting a less than average year. I spoke to a sugar maker this week who brought in 50% of an average crop. Much of that is due to the location, temperature and micro climate of individual sugarbushes. From our survey of members last week, here's a summary of what we're hearing:

- One operation reported their first boil on December 11th and their last boil on April 9th. The average first boil was mid-February for producers who responded to our survey and the average last boil was early April.
- Overall, just over 70% reported having an average or above average crop yield with just over 25% of producers reported having a record breaking year (or in the top one or two of production years). In contrast, just under 30% reported having a less than average year.
- Producers shared a variety of stories where we saw some trends across the state:
 - Significant wind damage this year that affected their yield as they were busy repairing lines at times they would have been collecting sap.

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- Uncertainty about the weather; while this is a seasonal story each year, this year we experienced some warm spells, some late snow, lots of wind and everything in between.
- Folks who implemented technology and equipment upgrades like vacuum systems, vacuum monitoring systems, increased reverse osmosis capacity, and new evaporators reported having good years and really appreciating the value of the upgrades.
- Warmer weather for several days at a time during the season meant some sap spoilage for those who didn't have enough storage to keep it cool before boiling during large sap flows.

One producer summed up the season quite succinctly, "location, location, location". While overall we expect production numbers to show that 2024 was a strong crop year, individual producer stories will depend, in part, on the location and topography of their sugarbush - high elevation? on a slope? what direction is the slope facing? near the lake? southern or northern Vermont? These and many other questions offer up different stories of the season, even in our small state.

Climate change has been shifting the maple season earlier in the year; one expert noted that the season has shifted by a month or more since the late-1800s in Vermont. And in general, the maple season here is getting compressed. Much of the technology and innovation in maple production can have positive impacts on tree health, operational efficiency, food safety and overall crop yield. In addition, it has helped producers mitigate the effects of climate change in their operations and allowed them to reduce inputs like labor and fuel related to maple production. Future research and innovation may be hard pressed to continue to mitigate the effects of climate change as much as they have in the last 10 to 15 years and will certainly require additional investments industry-wide.

Maple is similar to other businesses in that the costs associated with producing maple have increased, significantly in some areas, and the price of bulk or retail syrup has not risen at the same pace. Producers are feeling the squeeze as they consider upgrades or expansion and reviewing funding and loan options, especially given current and projected interest rates. According to Farm Credit East's 2024 Maple Industry Outlook, "when adjusted for inflation, the "real price" received for syrup has been declining over recent years. U.S. maple prices have not increased enough to compensate for inflation and maple producers are forced to operate with less revenue and tighter margins."

All of these topics will continue to be at the forefront of VMSMA's work with producers and industry partners over the coming year with an eye toward climate change, quality and food safety, forest health, operational best practices informed by existing and ongoing research.

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