



## Vermont Maple Sugar Makers' Association

P.O. Box 662, Lyndonville VT 05851

Phone: 802-777-2667

[www.VermontMaple.org](http://www.VermontMaple.org)

January 31, 2025

### **Testimony for House Committee on Agriculture, Food Resiliency & Forestry**

Allison Hope, VMSMA Executive Director

Thank you for inviting us to speak with you about Vermont Maple, an iconic crop that spans across both agriculture and forestry and is populated by a diverse set of innovative and passionate producers. Over the years, the industry has grown in ways that benefit Vermonter, 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.

### **Who is Vermont Maple?**

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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 (VMSMA) represents a large swath of these sugar makers – large and small, old and new – and is one of the oldest agricultural associations in the US, dating back to 1893.

And as we've met with you all in the past, you have a sense of what we do. As you have some new committee members, we thought it was worth summarizing our work and recent projects for you here as a refresher before the season.

Our work generally falls into four program areas (with plenty of spillover between them): Marketing, Advocacy, Partnerships and Education.

#### ***Marketing***

Two cornerstone events contribute to the majority of our consumer-facing work to market Vermont Maple and hundreds of producers.

#### ***The Big E, West Springfield, MA***

First, the Association has booth space in the Vermont Building at the Eastern States Exposition in MA. This building is part of the Avenue of the States and is a popular destination for fairgoers over the 17 day event. VMSMA has had a booth in this building since at least 1964 (the building has been around since 1929, with its one hundred year anniversary right around the corner).

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Last year, over 1.7 million ticket holders attended and many guests make their way through the VT Building and to our booth. As a producers' association we represent the entire Vermont maple industry to consumers, answering questions about how maple syrup, candy and cream are made and offering samples to talk through the flavor profiles of the different grades. The 2024 season offered record breaking ticket sales and record breaking booth sales for us. To run our booth for 17 days out of state is an expensive proposition; even in a record breaking year of \$230,000 in sales, our net proceeds were about \$56,000 and half of that is returned to the state for commission fees (12% on gross sales last year; next year 15% on gross sales). As a non-profit producers' association, we continue to seek options for a reduced or waived commission structure so this event can be just as much of a fundraiser for our work as it is a consumer marketing event. See the attached sheet for some pictures and details from the 2024 fair. We'd love to have you join us at the Big E in 2025 - Friday, September 12 through Sunday, September 28

### *Vermont's Maple Open House Weekend*

Maple Open House Weekend, Saturday & Sunday March 22 & 23, is VMSMA's signature and extremely popular statewide event. Last year our Maple Map included over 100 locations for visitors to tour and enjoy! Our team starts taking calls and emails from potential visitors in late fall - from folks who are visiting Vermont for the first time to folks who have a specific type of activity in mind and everything in between. We call ourselves the "maple concierges" of Vermont all year 'round, but especially during Open House. This annual weekend offers Vermonters and tourists an inside look at how maple syrup is made, an opportunity to meet some of our amazing producers and hear their stories, and buy maple products right from their source. It's also proven to be a great way for producers to meet new customers that lead to sales all across the country, and often lifetime friendships.

You are all invited to visit with producers this year during Maple Open House Weekend! As we get closer to the event, I'll be sending Committee members some recommendations that are specific to participating locations in your district.

### *Advocacy*

VMSMA staff and Board members work to ensure we have productive, collaborative relationships with state and local governments, our federal delegation, and our state and federal agencies. We participate in Farm Bill listening sessions; we table at the Taste of Vermont annual events in DC (now coordinated by Senator Sanders's office); and we meet regularly with our Congressional delegation staff, VAAF staff and FPR staff. As you can see from the stats shared below, the maple industry has changed over the years - through new food safety regulations, industry innovation, growth of state tap count and annual production, season compression due to climate change, and much more. As an important part of the ag and forestry economy in Vermont, we want to make sure our decision-makers understand the current state of the maple industry and how policies can impact and benefit our producers and stakeholders.

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### *Partnerships*

There are many partners in the maple space across North America and we work to collaborate, share knowledge, promote research, and much more. At a strategic level, VMSMA belongs to two trade associations for maple - the North American Maple Syrup Council and the International Maple Syrup Institute. Both include members from a majority of the maple producing states in the US as well as Quebec and other Canadian provinces. These two organizations help fund and share current research, ensure cross-border communication, and work on long term strategic priorities.

We have communication throughout the year with USDA folks from FSA, Rural Development, and NRCS and share funding opportunities. We participate in grant projects with FPR and NOFA-VT, Audubon and UVM, among others. We belong to the VT Fresh Network and collaborate with their team and other members. We work closely with UVM Extension and Proctor Maple Research Center and connect with folks from other research institutions across the country. We stay in touch with all other maple state associations to share information and collaborate. We connect with the major maple equipment manufacturers, all of whom have locations in Franklin County and dealers throughout the state. And we're always working to connect our producers with programs, opportunities, introductions, research and much more. Our Board members also participate on a number of VMSMA committees and come with their own network of partnerships and professional expertise that help us innovate and improve.

### *Education*

Our cornerstone educational event is Vermont Maple Conference Week, which is a long-standing partnership with UVM Extension. We kick off the week with a full day of Quality School, continue with our Annual Meeting and three days of online sessions, and end the week with a full day of in-person engagement at VSU, Randolph. Our in-person day includes hydrometer testing (courtesy of the state's Metrology lab), tradeshow, 12 educational sessions, great food and plenty of time to network with peers. This year, Dr. Tim Rademacher, was our keynote speaker - a great way to introduce producers to the new Scientific Director at Proctor Maple Research Center. We keep registration fees for this conference low in order to make it accessible to all producers - this year we had over 200 registrations for the conference. We also had some great sponsors - Lapierre, Dominion & Grimm, Farm Credit East and others, including financial assistance from VAAFMM - that helped cover expenses.

VMSMA's largest ongoing educational program is our Sugarhouse Certification & Grant Program. The Certification Program is the only state association run third party food safety certification program for maple producers. Created by sugar makers and technical experts, VMSMA created this program with some initial funding from a USDA Specialty Crop Block Grant through VAAFMM. Rolled out in 2020, this program aims to share information with producers of all sizes about best practices for food safety in all aspects of their operations - equipment, documentation, staff training, chemical safety, allergens & cross contamination, and much more. To that end, all of the information is free to any producer for self-education and the Certification fees for smaller producers create a very low barrier to access. In 2022, we were successful in applying for a federal earmark through Senator Leahy's office of over \$600,000. This funding allowed us to hire a highly qualified Certification Manager (October 2023, 0.5 FTE) and create a new Grant program for producers who participate in Certification. In the first two years of the

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Grant program, we've paid over \$160,000 directly to producers to upgrade equipment and improve their operations to achieve food safety goals. We anticipate federal earmark funding will last through 2027. This program has also offered VMSMA staff the opportunity to present at several conferences on the topic of food safety in sugarhouses and collaborate with other maple-producing states to continue to improve and share information that benefits both producers and consumers.

We also have an Association syrup hydrometer testing program as a benefit to the state's sugar makers. Ensuring that syrup hydrometers are reading accurately is one easy way to ensure correct density syrup that meets with quality standards and current regulations. We partnered with Marc Paquette at the state's Metrology lab and the state's retired Consumer Protection Chief, Henry Marckres, as well as Mark Isselhardt to train staff on the use of our new testing kits. We now offer testing wherever sugar makers are gathered and as part of our Certification Program.

### State of the Maple Economy

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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 actual number probably closer to 3,000.

The USDA's crop report for maple in 2024 shows VT production of 3.108 million gallons, or about 53% of the US production. (2024 US production was reported as 5.860 million gallons). It's important to note that these numbers are widely regarded as an undercount of production, but the industry has worked closely with USDA NASS leaders to update the survey and improve future outcomes.

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

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 an estimated 1800 producers,, 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 over a decade old, the total impact reported was about \$330 million annually.

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Maple is growing in the state – which means more jobs across a variety of sectors in agriculture and forestry. VMSMA's 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 story does the current NASS data tell about growth? In the last 20 years, Vermont has reported a 465% 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)
2004	1,557,000	550,000	35%	
2012	2,276,000	999,000	44%	
2024	5,860,000	3,108,000	53%	465% 2004 to 2024

## What Does the Future Hold?

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### *Projects*

- On a local level, we partnered last year with VAAFV to submit a USDA Acer grant that we wrote for improved maple retail packaging that would have benefitted producers across the country while looking at improvements for sustainability, quality retention, ease of packing, and ease of storing with an eye toward the latest consumer research.. We were not successful in this application, but hope to re-introduce it in the future.
- We are currently partnering with VAAFV to access some of their existing USDA Acer funding (from 2021) to create a new consumer-facing maple website. While VMSMA hosts consumer information on our VermontMaple.org site, we're serving two different audiences - consumers and sugar makers. In order to be most effective for both, we'll be separating the consumer information and rebuilding the site to better engage consumers in producer stories, information about maple and how to use it as a substitute for processed white sugar, creating a new consumer e-newsletter and much more. The RFP is currently open until February 11th and we hope to have a number of contractors interested in this work.

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### *Climate Change*

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. Climate resiliency is a huge topic on its own and is a part of the conversations, partnerships and research of the industry, which relies on long term forest health for sustained success..

### *Increased Cost of Production*

We hear from producers that they are experiencing increased costs across the Board - labor, equipment, packaging, insurance - while the price of syrup hasn't increased at the same rate. Like many Vermonters, they're feeling the squeeze. Like most consumer packaged goods, maple syrup prices walk a fine line and raising them too much may mean a decrease in sales if consumers decide to purchase a lower priced sweetener across the many options.

### *Government Affairs*

Anticipated changes at the federal level have the potential to directly impact maple producers. The implications of proposed 25% tariffs on Canadian imports will have consequences for Vermont maple.. The majority of maple equipment in the US comes from Canada. While Vermont produces about 50% of the US maple crop, Canada produces the majority of the world's crop. Canada exports their maple syrup to 68 countries, but about 59% of their exports head to the US, some in retail containers and some in bulk. Bulk buyers and co-packers in Vermont (like Butternut Mountain Farm in Morrisville and Maple Grove in St. Johnsbury) import Canadian syrup to co-pack with Vermont syrup for large accounts across the US (Costco, Whole Foods, Target and similar). These accounts keep pure maple syrup (from Vermont and other states and provinces) in front of consumers all across the US and are important markets. The US bulk price of maple syrup is influenced by the Canadian dollar and other factors, so any changes to Canadian trade agreements also have the potential to impact pricing in the US.

The conversations and directives around immigration, visas and deportation could have incredible impacts on the agricultural community in Vermont, and maple is not immune. Some maple operations use visaed workers seasonally or throughout the year and may also use recent immigrants in a variety of roles. As you're well aware, the US agricultural economy and food security relies heavily on foreign-born workers.

The potential of decreased impact from federal agencies, like the USDA and the FDA, could mean lower food safety standards (or standards that are not enforced), concerns about adulteration resurfacing, less funding for research, less ability to accurately report annual crop data, and much more. And the continued extension of the Farm Bill, rather than passing an updated version, has impacts on maple funding and other sources of important agricultural funding across the US.

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The recent pause on federal funding puts several of VMSMA's partner grant projects on hold or in question - including any future funding through the USDA Specialty Crop funding that flows through Vermont. Many of these are for projects that already have signed contracts and project plans.

As expected, federal appointments have affected local leadership within USDA Farm Service Agency and USDA Rural Development. Both John Roberts and Sarah Waring, respectively, were appointed leaders who have now moved on from these roles. Both were extremely effective at communicating with VMSMA and understanding the interests of maple producers in Vermont. They leave quite a leadership and knowledge gap within the state.

We're having internal and North American-wide conversations on many of these topics to find strategic alignment toward advocacy.

### **You are Cordially Invited!**

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#### ***March 22 & 23***

Join one or several producers in your District for Maple Open House Weekend! We'll send you an email a week or two prior, with some suggested locations in your district or nearby.

#### ***May 15, 2025 at Proctor Maple Research Center, Underhill VT:***

VMSMA is co-hosting a strategic maple meeting with Proctor Maple Research Center, our Board, industry stakeholders and partners, and state and federal decision makers. We'd love to have representation from your committee to tour Proctor, meet other stakeholders, discuss strategic goals for the industry and anticipate how future policies may affect the maple economy. We'll have an update on the 2025 season and by then we should understand how any state and federal changes may impact producers and the maple industry in Vermont. We'll share more details as we get closer to spring!

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## THERE'S NO PLACE LIKE THE BIG E!

Allison Hope, VMSMA Executive Director

Did you go see the movie *Wicked* in theaters this fall? *Oz* reminds me a little of the Big E - what a show it is, with so many curious people trying new things and knowing they can find many answers if they follow the path to the Vermont Building and our booth. The Big E is just a different world!

The Vermont Maple Sugar Makers' Association has been a part of the Vermont Building at the Big E since the early days, but perhaps not as long as the building has been in place (since 1929). Our booth at the Big E has become one of the cornerstones of our fundraising efforts and an important part of our direct marketing to consumers. This year ticket sales broke records for the total fair (1.63 million guests over 17 days) and for Vermont Day (almost 179,00 guests). Many of these fairgoers go through the Vermont Building directly to the Vermont Maple booth. And many return year after year to purchase their syrup, cream, and candy.

This year we added a few new products to the booth and all sold well enough to make a return next year: 12oz bags of Speeder & Earl's Maple French Roast Coffee, Maple Cream Cookies from Butternut Mountain Farm, and Maple Snack Mix from Two Brothers' Maple. We brew the Maple French Roast in the booth all day long and folks remark on the amazing smell all day long. Courtesy of Kenn Hastings, we tried out a fancy, shiny new machine to fill cream cones and frost fresh, locally baked donuts. We loved it so much (as did all the passers-by) that we just purchased one for VMSMA to use next year - we fill it with cream and then can dial in the exact dose we'd like in cones and on donuts. No more "cream elbow" for our volunteers who are used to filling thousands of cones with a spatula and some elbow grease.

From sharing our love of maple with the masses, talking about the different grades, offering samples, and eating every fried food that exists (and some vegetables, every once in a while), volunteering in VMSMA's Big E booth is FUN! It's hard work, but the energy of fairgoers and the camaraderie in the building carries you along through each day.

This year and in many years past, we're grateful for the work of Mike Christian and Kenn Hastings. Mike and Kenn make ALL of the maple cream for the booth - what we use from the buckets for cones and donuts and what we sell in half-pound and pound containers. Most of the syrup used to make the cream was purchased from Jason Gagne and Gagne Maple in Highgate. Jason also supplied the syrup for candy-making this year and we partnered with Maple City Candy in St. Albans to make it. Mike works behind the scenes throughout the year on logistics - coordinating transport and supplies, purchasing canned syrup, ensuring we have onsite storage, and setting up for a successful fair. Our booth was Addison County strong this year with Mike and Kenn in the lead and with a week of assistance from Lisbie Laframboise (a new addition to the booth this year)! This year, we found success with a lean team of 31 different volunteers working anywhere from 2 to 14 shifts each. It was a little too lean some days (it was a busy year) and we look forward to welcoming YOU and other new volunteers into the booth in 2025! You can reserve your volunteer shifts using our quick online form here: <https://bit.ly/BigE2025>.