



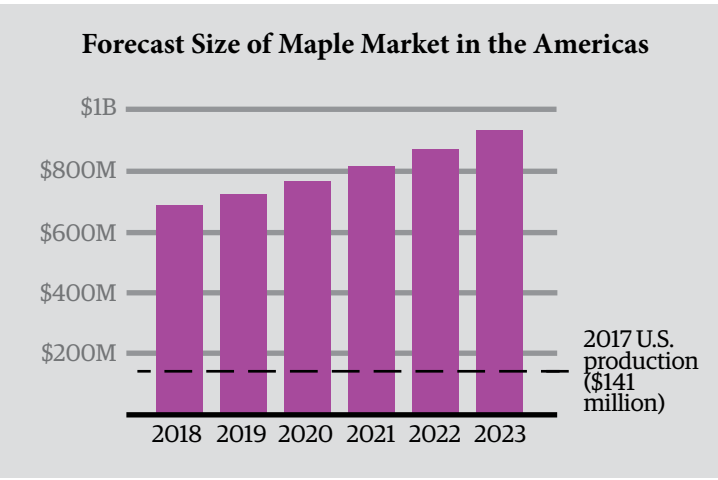
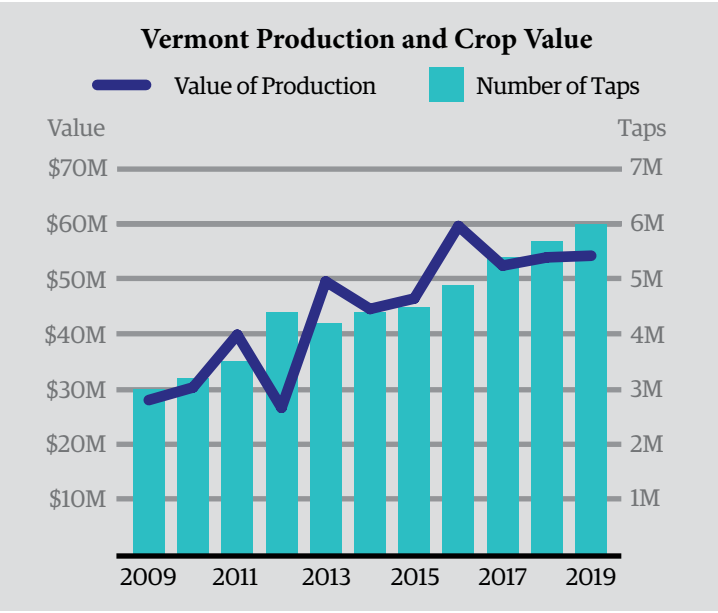
**What's At Stake?**

The Vermont maple sector is experiencing rapid growth in production and product innovation while holding a leadership role in maple distribution, research, and manufacturing for the United States. The expanding national demand for natural sweeteners, paired with improved production practices, creates an opportunity for continued expansion that will bolster job opportunities at all levels of the maple industry. Research estimates that 12% of the current maple resources are being used for syrup production, leaving a large amount of untapped forest available for expansion.<sup>1</sup> Maple leaders are optimistic about sustained growth but recognize the need to adapt to new policy, climate, land use, and market forces to maintain Vermont's role as the premier maple state in the United States.

**Current Conditions**

Vermont produces 50% of the entire United States maple crop. High syrup prices from 2008-2013 facilitated rapid expansion and a significant influx of new businesses. The overall tap count and gross agricultural sales of maple syrup doubled in Vermont from 2008 to 2018 with farm-level production valued at \$54 million in 2018.<sup>2</sup> By 2018 the softening market price slowed expansion but many existing producers continue to increase production. Research from the UVM Proctor Maple Research Center and adoption of new technologies have played a major role in improving best practices that have increased yields. Recent food safety policy, water quality regulations, and climate change, however, provide a new list of issues that will require new practices to address.

Over 80% of the annual Vermont crop is sold to bulk buyers and a large portion of Vermont syrup is exported out of the state by both packers and individual producers. In-state syrup markets are experiencing increased competition as the syrup supply and the number of producers increase. Canadian syrup imports and United States and Canadian currency exchange rates also create strong competition against Vermont syrup nationally. Recent U.S. trade policy and tariffs have provided an additional advantage favoring Canadian companies. Meanwhile, maple expansion in other states prompts the need to bolster an updated Vermont maple brand.



## Bottlenecks & Gaps

- A tight labor market for sugar bush management and food manufacturing jobs is a challenge to growing companies.
- USDA National Agricultural Statistics Service (NASS) data is thought to under-report maple production and accurate sources for maple forest land use data do not exist.
- Retail inspection oversight has not kept pace with market expansion.
- Climate change impacts on forest ecosystems are not fully understood.
- A growing global syrup supply creates a price-competitive marketplace that favors low-cost producers and capable marketers.
- The changing demographic among sugarmakers challenges institutions of member associations, knowledge exchange, and collective communication and advocacy.

## Opportunities

- Education and verification programs can teach and promote food safety best practices.
- Markets have room to expand throughout the U.S. and internationally.
- Market research could develop relevant campaigns including more product attributes and consumer experiences. This includes maple promotion as an all-natural sweetener and the environmental attributes of maple forest stewardship.
- Innovation in maple packaging and new product forms could expand maple into new product categories.
- Overall, appropriate investment will enable Vermont to maintain its preeminent role in maple research, production, technology innovation and marketing.

## Recommendations

- Public-private marketing initiatives should be developed in order to maintain Vermont brand recognition and facilitate market expansion of pure maple syrup across the U.S. This should include the development of consumer education campaigns that position maple as a natural sweetener (i.e., corn syrup alternative) and highlight Vermont's position as a brand leader. Public-private partnerships should fund product development research and support first-mover businesses seeking to expand into new product categories, such as beverages and snacks.
- Improve preparedness for state agencies and institutions to make increased investment to keep pace with industry growth. Investment is needed in the following areas:
  - Expand Vermont Agency of Agriculture, Food and Markets retail inspections and oversight to maintain standards for syrup in the marketplace.
  - Expand educational programs focused on syrup grading and quality standards.
- Initiate a statewide workforce development and workplace safety program to address the unique needs of both forest management and food manufacturing career tracks as job opportunities increase.
- Develop Vermont as the industry leader in maple food safety programs. Expanded funding is needed to maintain the Vermont Sugarhouse Certification Program coordinated by the Vermont Maple Sugar Makers Association past 2020. Industry and state representatives must collaborate to determine which entities have the long-term capacity to oversee critical maple food safety training and verification programs. Additional programs will be needed for maple processors and handlers throughout the supply chain. Cost: ~\$100,000.
- Improved economic and land use data is needed to evaluate the impact of maple in Vermont and nationally.
- Prioritize forest climate change research and new programs to develop adaptation strategies.

Farm to Plate is Vermont's food system plan being implemented statewide to increase economic development and jobs in the farm and food sector and improve access to healthy local food for all Vermonters.

The Vermont Agency of Agriculture, Food & Markets (VAAFM) facilitates, supports, and encourages the growth and viability of agriculture in Vermont while protecting the working landscape, human health, animal health, plant health, consumers, and the environment.

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