The quarterly Board of Directors and Annual Meetings of the International Maple Syrup Institute (IMSI) were held at the Marriott Courtyard Hotel in Concord, NH on Friday, October 26th and Saturday, October 27th respectively. IMSI Task team meetings were held in advance of the IMSI Board meeting. The IMSI Executive Committee also met with the Executive Committee of the North American Maple Syrup Council. Attendance at the IMSI Board meeting was strong and included representation from maple producer associations, maple packers/processors, maple equipment manufacturers/vendors, small maple enterprises, maple researchers, maple marketing specialists and others.

IMSI Continues Search for a New Executive Director:
The IMSI is continuing the search for a new Executive Director until a suitable replacement candidate is found. The job advertisement is being updated and will be published in the next edition of the Maple News and the Maple Syrup Digest as well as in other advertisement venues.

In order to ensure a smooth transition in management, Dave Chapeskie has been contracted to serve as Interim Executive Director, as required, and Consultant from January 1st to May 31st, 2019. This will allow time for the selection of a replacement candidate and his/her starting date will be announced when it is known. Dave will also provide mentoring, as needed, for the new Executive Director and continue to assist with the management of complex and sensitive files during this transition period.

IMSI Commission to Review the IMSI’s Mandate:
The IMSI Board of Directors has given the green light to setting up an IMSI Commission or Study Group to review the IMSI’s Mandate and make recommendations to ensure that future investment of people and financial resources is as efficient as possible and tied to the high priority needs of the North American Maple Syrup Industry. Most successful organizations periodically conduct a self-assessment such as this so that human and capital resources continue to be invested wisely and in accordance with the mandate and priority needs of the organization. The environment within which the IMSI operates and the issues it works to address have become increasingly complex over the past decade. In this environment, program delivery costs will increase and setting of work program priorities will become increasingly important.

The Commission will serve as a Committee of the IMSI and the membership will be comprised of three maple industry representatives from the United States and three representatives from Canada. The IMSI Executive Committee will serve as a Steering Committee for the Commission. The Commission will begin its work in the fall of 2018 and will provide a final report with recommendations as soon as possible in 2019.

Further details on the IMSI Commission can be obtained from Dave Chapeskie, IMSI Executive Director at agrofor@ripnet.com.

IMSI Elects Board of Directors, Executive Officers and Consultants/Advisors for 2019:
The IMSI elected its Officers and Directors for the 2019 calendar year at their Annual meeting in Concord, NH. Ray Bonenberg will be continuing as IMSI President and Mark Harran will be continuing as IMSI Past President for the third consecutive year. Pam Green will continue as IMSI’s 1st Vice President
and Tom Zaffis of Turkey Hill Ltd. was elected as 2nd Vice President replacing Jeff Goulet who had served in that role previously. David Campbell will continue as the IMSI’s Treasurer.

There was little change in IMSI Director representation for 2019, with a total of 29 Directors representing maple stakeholder interests in both the United States and Canada. Tom Zaffis replaced Michael Hermin as Turkey Hill’s representative on the Board and Gary Gaudette chose to leave the Board and will continue to serve as a Maple Consultant to the IMSI in 2019. Michael Hermin was also added to the IMSI Maple Consultants group. Both Gary and Michael are thanked for their long service to the IMSI both as Executive Officers and Board members over many years.

The approved 2019 slate of IMSI Officers, Directors and Maple Consultants for 2019 can be obtained from the IMSI Executive Director upon request.

**Maple Syrup Supply, Demand and Pricing:**

Growth in maple syrup production capacity in the U.S. is estimated at one million taps. Some believe that the USDA National Agricultural Statistics Service data for production capacity is significantly underestimated in some U.S. States.

A planned expansion of five million taps in Quebec is underway with about 3 million taps already installed. Production capacity in Ontario and New Brunswick is increasing with a few large start-ups in Ontario.

Maple equipment vendors reported that new maple equipment bookings are extending into 2019. Tariffs imposed by the U.S. on aluminum and steel are putting some upward pressure on prices of maple equipment containing these materials.

Going into the 2018 production season, supply of maple syrup was very good in most areas with about 80 million pounds of maple syrup in the Federation’s strategic reserve. In September 2018, production of bulk syrup in Quebec was 106 million pounds, a drop of about 30% from the same period in 2017. Some packersprocessors have held an inventory surplus over the past two years. This may be leading to some rebalancing of supply and demand in 2018/19. It is expected that there will be a sufficient supply of maple syrup to meet overall demand through to the 2019 maple production season.

The Federation of Quebec Maple Syrup Producers reported that sales from the strategic reserve were stable when compared to 2017. Canadian exports of maple syrup were about 11% higher in 2018, when compared to 2017.

Maple packers report that the demand for maple syrup and other real maple products remains very good and is gradually increasing both in North America and overseas. Use of real maple syrup in a variety of food products is growing and is noticeable in retail outlets both in the United States and Canada. Profit margins, however, are thin in some circumstance and the marketplace is very competitive. Prices for packaging are increasing significantly.
U.S. and Canadian Tariffs Affecting the North American Maple Syrup Industry:
Tariffs imposed by the United States government on aluminum and steel imports from Canada remain in place despite the announcement of a new U.S., Mexico, Canada (USMC) trade agreement to replace NAFTA. Counter-tariff’s on maple syrup imports to Canada from the United States also remain in place. Hopefully, these tariffs will be removed with further bi-lateral negotiation between the United States and Canadian governments.

FDA Added Sugar Issue Update:
Following the last round of public consultations, The FDA announced that they had listened to industry and consumer concerns regarding the Added Sugar rule requirement on the FDA’s new Nutritional Facts Panel. The Commissioner of FDA announced in August of 2018 that the FDA would be delivering revised draft guidance early in 2019 that would remove the Added Sugar line item requirement from some single-ingredient products such as maple syrup and honey. The IMSI is seeking a further extension to the compliance dates for the maple industry so that there is additional time for producer and public awareness, printing of new labels, etc.

The IMSI also continues to advocate for a permanent fix to the Added Sugar legislation with the assistance of a lobbyist based in Washington, DC. A permanent fix would ensure that the FDA cannot re-open the Added Sugar debate at some point in the future.

The IMSI wishes to extend special thanks to all who expressed their views to the FDA regarding the Added Sugar requirement and to the state maple associations who assisted the lobbying effort to remove the Added Sugar requirement. Both Emma Marvin and Roger Brown from Vermont received special recognition from the IMSI for their leadership role in working with the IMSI to help resolve the issue.

Proposal for Codex Certification of Maple Syrup and Petition to Amend the FDA’s Definition for Maple Syrup:
The IMSI continues to support a proposal to obtain International Codex Certification for Maple Syrup and has worked in support of a Codex application which was developed by the Federation of Quebec Maple Syrup Producers. In addition to the Certification itself, Codex will help define maple syrup in the global marketplace and ultimately raise awareness regarding real maple products. Obtaining Codex Certification is a long-term initiative which may extend over many years. The website for Codex is www.fao.org/fao-who-codexalimentarius/en/.

As a prerequisite to filing for Codex Certification it is necessary that the legal definition for maple syrup at the Federal level in Canada and the United State is aligned. Unfortunately, FDA’s definition is out of date and currently stipulates that salt and chemical preservatives are ingredients which may be added to the product. Recently, the IMSI filed a public petition to FDA making a case to have FDA’s legal definition changed to exclude reference to salt and chemical preservatives. The IMSI’s U.S. members are encouraged to express their support to FDA for the amendment. A copy of the petition which was filed can be obtained from the IMSI’s Executive Director, upon request.

USDA Dietary Guidelines Review:
The United States Department of Agriculture is currently embarking on a review of Dietary Guidelines for Food Products. Since this review and new dietary guidelines could ultimately have significant implications for the maple syrup industry, the IMSI has been monitoring arrangements for the review
closely. There was an opportunity to have a representative from the maple syrup industry potentially selected to be on a Scientific Advisory Panel for the review. The IMSI officially nominated Dr. Abby van den Berg from UVM Proctor Maple Research Center to serve on the Advisory Panel. We are now waiting to hear if the nomination of Abby has been accepted by USDA.

**U.S. Maple Industry Alliance - New Delivery Arm of the IMSI:**
A new Alliance Group or Task Team comprised of state maple association representatives has been put in place to help assist the IMSI in monitoring and addressing issues which may emerge from time to time in the United States. A similar Canadian Maple Advisory Group has been in place to help identify and address issues unique to Canada. This group will work closely with the IMSI Executive Director and will operate similar to any other Task Team or Committee of the IMSI. Recommendations from the Alliance Group will be addressed by the IMSI Board of Directors to ensure that all U.S. Industry Stakeholders are in support of proposed initiatives and actions of the group. The alliance forum will also provide an excellent opportunity to share information on challenges and issues being addressed at the state level such as the Food Safety Modernization Act. The overall intent is to have a cohesive group or unit in the U.S. which can support the IMSI in addressing future issues through advocacy and garnering support at the state level. Membership is voluntary but all U.S. Maple Producer Associations are encouraged to participate.

Confirmed members of the U.S. Maple Industry Alliance as well as others who are considering membership met face-to-face in Concord, NH at the Annual Maple Industry Conference in October. This was a first meeting of the group which provided participants from different maple producing states an opportunity to meet one another and finalize the Terms of Reference for the Group. Amanda Voyer, Executive Director of the Vermont Maple Sugar Makers’ Association and Helen Thomas, Executive Director of the New York State Maple Syrup Producers’ Association have agreed to Co-Chair the Alliance Group.

**IMSI Social Media Initiative:**
The IMSI Social Media Task Team met in Concord, NH in advance of the IMSI’s Board of Directors Meeting. Brad Gillilan, Task Team Chair, subsequently reported to the IMSI Board of Directors. The IMSI Social Media Initiative and website was launched in September 2017 under the leadership of Brad Gillilan, IMSI Director and President of Leader Evaporator. While there have been some growing pains in the initial year, it has been a very good initiative and one worth continuing. All are encouraged to monitor and utilize content from the IMSI Facebook postings to support their own maple information sharing, promotion and marketing initiatives. Brad advised the Board that he can no longer Chair the Task Team due to other work pressures but that he will continue to support the initiative from the wings. Andrew Schmidt, IMSI Director from Massachusetts, agreed to pick up the reins and chair the initiative going forward.

Follow-up postings on the IMSI Facebook page over the November 2018 to March 2019 period will primarily align with the following themes:

- **November - December 2018** – Holidays and Gift Giving
- **January - March 2019** – Processing and Use of Real Maple Products

**Note (1):** Messages regarding the nutritional and health benefits of maple syrup can be interwoven throughout.

**Note (2):** Other important and timely information may be included as well at the discretion of the IMSI’s Social Media Task Team Chair.
You are encouraged to reach out to Andrew if you have a message or information which you think may resonate with consumers and producers across the maple industry.

**Maple Grading Schools and Quality Assurance Training:**
Kathy Hopkins, coordinator for the IMSI sponsored grading school provided a report on the 2018 activities of the school to the IMSI Board in Concord. Kathy and her team delivered a very successful school in Keene, NH just in advance of the NAMSC-IMSI Annual Meeting Conference. A school is planned in conjunction with the NAMSC-IMSI Annual Conference in Duluth, MI in October 2019. One or more additional schools may also be offered in the upcoming year but are not yet confirmed. Please check the grading school website ([https://extension.umaine.edu/maple-grading-school/](https://extension.umaine.edu/maple-grading-school/)) for school offerings and details on registration periodically so that you do not miss an opportunity. The IMSI will continue to support the Grading School financially in 2019.

Yves Bois of Centre Acer in Quebec provided a report on maple grading and quality assurance training in Quebec. The reach and quality of these schools in the largest maple producing region in North America is in a word “impressive”.

**IMSI Annual Award Recipients in 2018:**
Recipients of the IMSI Annual Awards for 2018 were announced at the NAMSC-IMSI Conference Banquet in Concord, NH:

**IMSI’s Golden Maple Leaf Award** – Centre Acer of Quebec for their outstanding contribution to maple research and information transfer to the North American Maple Syrup Industry.

**IMSI Lynn Reynold’s Memorial Leadership Award** – Mark Harran of Connecticut for his exemplary leadership and contribution to the North American Maple Syrup Industry.

**IMSI President’s Award**
– Emma Marvin and Roger Brown of Vermont for their leadership and contribution in helping address the FDA Added Sugar Issue.
– Dr. Tim Perkins of Vermont for his very significant contributions in supporting IMSI lead initiatives over many years.
– Dave Chapeskie of Ontario for his commitment and extensive contributions to supporting and advancing the North American Maple Syrup Industry while serving as the IMSI’s Executive Director.

**IMSI Board of Directors and Annual Meetings in 2019:**
**Winter IMSI Board of Directors Meeting** – Friday, February 1st in Quebec (Location to be confirmed)
**Spring IMSI Board of Directors Meeting** – Wednesday, May 15th in Burlington, Vermont
**Summer IMSI Board of Directors Meeting** – To Be Determined
**Fall IMSI Board of Directors and Annual Meetings** – October 21st - 24th, 2019 at Duluth Entertainment and Convention Center, Duluth, Minnesota

**Report Prepared by:**
Dave Chapeskie,
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November 2018