



IMSI Activities & Accomplishments 2020

December 4, 2020

IMSI Statement of Purpose - The International Maple Syrup Institute will act on behalf of the maple industry on issues affecting the interests and the economic viability of the various sectors of the industry.

The IMSI Hosted 5 Industry Forums in 2020 and 1 AGM. The IMSI's mission is to provide an active member-based forum for advancing ideas to develop the maple industry and promote maple syrup. To this end, the Executive group met 12 times and the Board and industry participants met as follows:

1 Board Meeting - February 5 th - Burlington	4 Board Meeting – September 25 th - Zoom
2 Board Meeting - May 8 th - Zoom	5 AGM – October 30 th - Zoom
3 Board Meeting - July 10 th , 2020 - Zoom	6 Board Meeting – December 5 th - Zoom

A New President Takes the Helm. Pamela Green began her tenure as President of the IMSI in January 2020. She is supported by the Executive Committee made up of Ray Bonenberg, David Campbell, Mike Farrell, Mark Harran, and Tom Zaffis.

Communication to Associations, Business Leaders, and Industry Participants. The IMSI sent specific and targeted communication to industry members and associations. Detailed minutes of the Board of Directors meetings explaining the discussion and the issues were sent to all. Additionally, a more concise version of the minutes, focusing on debate and decision items was sent to associations to encourage dissemination to the provincial or state association members through email and newsletter communication. Also, at the association's request, a document was sent to the associations explaining the IMSI's role and its achievements and contributions to the industry. Many of the associations communicated this to their members to clarify the IMSI's role.

Communication to publications. Ready-to-publish articles, special documents, updates, meeting summaries and information were specifically tailored and sent to the Maple News and Maple Digest to inform the maple public at large, augment the IMSI's reach and serve valuable, up-to-date content to these publications.

Industry & Government Inquiries – In 2020, the IMSI responded to numerous demands and special requests for information and collaboration from individuals and government officials. Recently, the CFIA contacted the IMSI to help facilitate communication to member producer associations.

Annual meetings. In October 2019, IMSI members asked to Board to reexamine the structure of the annual meeting. Much attention and communication (written, phone & Zoom) were directed at the provincial and state maple associations to explain and discuss this. Two documents explaining the issue and proposing a new vision were sent to the Board and to associations soliciting participation in the discussion.



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IMSI Envisions an AGM & Annual Meeting with a Greater Scope of Interest & Broader Attendance. The IMSI discussed and outlined potential new structure for the annual meeting. The current 4-day meeting is viewed as too long and too expensive. This topic came up at the Duluth meeting, although participants enjoyed the meeting and the social aspects, our members mentioned that they would like the AGM to be held at a more central location and to alternate between the US and Canada. Note that this would not necessarily preclude the associations holding an annual meeting rotating among the 17 NAMSC members or the IMSI's participation. The IMSI drew up several elaborate scenarios for change and invited its members as well as NAMSC to comment on the ideas. Shortly after that, the pandemic struck and presaged potentially disruptive changes to the way people meet. Some discussions with associations have occurred, and potential formats discussed. No definitive solution has been determined, however all IMSI members have expressed the desire to hold in-person meetings once the pandemic is over. Some creative work, consensus building, and creative solutions needs to happen in 2021.

Communication with NAMSC – In an effort to align the industry resources and efforts effectively, the IMSI has communicated consistently with NAMSC, all the information bulletins, minutes, briefings have been sent via an expanded mailing that includes NAMSC leadership and many of its members. The NAMSC president and IMSI executive director have held many meetings on the phone as required.

The IMSI Implemented the *IMSI Commission Report (CR) Recommendations.*

- ✓ **Increased Fee Structure to Enable the IMSI Purpose.** A new fee structure was implemented in the first quarter after much discussion and rationalization. However, it did not achieve the targeted revenue, thus limiting the scope of activities and services to members.
- ✓ **Higher Involvement & New Member Engagement.** The executive director reached out to numerous lapsed associations and to potential new members to join the forum or to reengage resulting in average participation of 44 (previous year was 25). To keep the maple community informed and engaged, the IMSI mailing list to the industry, members and collaborators doubled to 114 recipients.
- ✓ **Association Outreach - Commentary & Insights from Maple Associations.** One-on-one Zoom consultations with IMSI association leaders were conducted to understand the issues facing them and to improve the IMSI's service to them. A report of the findings from the association outreach initiative will be developed and shared. Any action arising from those discussions will be discussed with the Board of Directors.

COVID-19 IMSI Adapted & Informed its Members

Among its communications, the IMSI:

- ✓ Successfully pivoted to Zoom meetings in 2020 - increased attendance and engagement.



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- ✓ Provided timely information, updates, and links to government and health authority's public health and operational guidance during the pandemic.
- ✓ Provided marketing, merchandising and sales strategies and tactics specifically applicable the maple industry sectors.
- ✓ Provided summaries and links to strategic information, notably from best-in-class sources like McKinsey, the Harvard Business School, and the New York Times.

Market and Consumer Information. In response to the maple industry interest in understanding consumer and market dynamics, on February 5th 2020, IPSOS (a global market research firm), and ACNielsen presented their research and data analysis capabilities to enlighten the industry about the maple consumer's behavior, attitudes, and critical sales trends and market share data. Such knowledge would be useful to help associations, packers, producers, and any smaller maple businesses formulate effective marketing and communication strategies and guide product and packaging innovation. For the industry in general, sales data and consumer information would be useful to fulfil its purpose to *act on issues affecting the interests and the economic viability of the various sectors of the industry*. The IMSI and its members as a group, do not have specific information about the maple consumer or sales trends. The executive director suggested that a special committee made up of packers and producers could look a pooling its resources to commission a U&A spanning the North American continent. Fragments of information and markets are known by individual corporate members, but a comprehensive picture of the market and the consumer would be helpful guide strategy and would save money. Similarly, a scan data survey of sweetener category sales, penetration, pricing and promotion, market share trends and new *competing and substitute products* could be useful.

Labelling. At meetings (Feb 5th and onwards) and in numerous email communication to the industry, the IMSI reiterated its recommendation that maple syrup nutritional facts panels on packages conform to the 2019 FDA guidance with the footnote option that as per the FDA guidance issued July 18, 2019. The final FDA footnote (influenced by IMSI – FDA intervention) avoids leaving the reader with no information about that DV%; it helps the consumer understand the %DV, otherwise it is 'orphaned'/not explained. It was noted that maple syrup packages should comply uniformly and consistently in the marketplace. Note that the deadline for compliance is July 2021, however due to the pandemic, the deadline was extended for some segments. This information was also communicated to members as it happened.

Lead elimination. The timeline chart for lead elimination in equipment was discussed and distributed to associations, members and the Maple News and Digest emphasizing that October 2020 is the date that the final date for compliance for all the industry, small size producers were the last segment to be required to comply to using only lead-free equipment.

Standard of Identity (SOI). SOI regulations and definitions vary a lot by jurisdiction and some are inadequate. The IMSI intends to amend the current definitions so they are as consistent as possible with each other and then go forward with a CODEX application. The maple industry's goal is to protect the 'pure' nature of maple



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syrup from the problem of economic adulteration on a global scale. In the context world-wide maple exports as well as new processing technologies that propose synthetic means of producing maple syrup and threaten the authentic nature and process of maple syrup, achieving the CODEX standard is especially relevant. To this end, in February 2020, a Standard of Identity/CODEX committee was formed to draft an ideal Standard of Identity (SOI). The committee Christine Jean (CIE), Helen Thomas (U.S. Alliance), Annie St Onge (PPAQ), Abby Van den berg (University of Vermont), Luc Lagacé (Centre ACER) and Jean Lamontagne (IMSI). A careful and comprehensive analysis of current State and Provincial SOI's was drafted. The committee met frequently to analyze and comment on the various versions of the SOI to finally draft the best possible single SOI version. In August, a petition was drafted to present to the FDA with the final wording¹. The petition was presented to the board on September 25th for ratification. However, it was sent back to the committee for further review regarding the new sentence stating that no soluble solids may be added or removed. The sentence was reexamined and deemed to be correct and good to include in the SOI to prohibit by exclusion, the use of processes that do not conform. Board approval is pending after which the process toward harmonization and CODEX can move forward.

FDA & USDA – IMSI Petitions and Response to Public Consultations. The IMSI sent several registered comments to the FDA in response to public forums and consultations in defense of the industry.

1. October 2019 & February 2020 – The IMSI followed up with the FDA on its proposal to use alternative footnotes to the new nutritional panel.
2. April 2020 - In connection with the FDA's strategy to modernize standards of identity, the IMSI shared its strategy of harmonizing the maple syrup SOI and follow up with an SOI for maple water, maple flavor, and other maple products and derivatives of the maple sap.
3. August 2020 - The IMSI commented to USDA on the Scientific Report of the 2020 Dietary Guidelines Advisory Committee and objected to the reduction of allowable calories from added sugars from 10% to 6%.

IMSI Policy – Letters of Support - IMSI published guidelines for writing and issuing letters of support to ensure any IMSI endorsement is fair to recipients and competing interests, does not conflict with the IMSI's mission/values, advances the industry and does not disadvantage or prejudice one organization at the expense of another.

Six Letters of Support Were Written for Research & Marketing - The IMSI wrote 6 letters of support for our outstanding maple researchers, namely, Adam Wild of Cornell University, Navindra Seeram of the University of Rhode Island, Tim Perkins, and Abby Van den berg of the University of Vermont. Additionally, the IMSI sent letters of support for the New York State Department of Agriculture and Markets & NYSMPA initiated by

¹ The new SOI excludes reference to salt and chemical preservatives and John Goldberg contributed to the analysis and assisted with the drafting of the petition. Soluble solids may not be added or removed 66.0 percent soluble solids by weight and a maximum of 68.9 percent



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Helen Thomas and one for the Ontario Maple Syrup Association initiated by Ray Bonenberg, both for marketing and marketing research. Most of the projects were successful with the sum of grants > \$2M USD.

Canadian Labelling Updates – The IMSI began to review status of current regulatory initiatives by the Canadian Food Inspection Agency and Health Canada. The IMSI now has a dedicated contact so progress will be made in the coming year to inform the group about the agency’s agenda regarding labeling and other regulations and health policies that could affect the industry. In the past years, Health Canada entertained the possibility of using front-of-package nutrition information and warnings, including added sugar. More to come.

IMSI Website - The English website was partially updated with relevant and up to date information. Many new documents were written especially for the website and the layout was reorganized for easier navigation. The opening page shows the Canada – US flags and a sugaring season maple forest scene to emphasize the website’s vocation, and to inform about the transnational industry. A much more complete list of maple industry participants and resources can be found including specific sections listing our active members by sector. The English website needs a few more updates and new documents (one on the environment) and the French website work will begin in December as it is more efficient to complete one and follow the new model and translate documents for the other. Some important archival and reference documents and texts will be translated to display the same information in both languages. Expected completion by February 2021.

Bi-lingual Correspondence –The IMSI is translating its formal minutes, important documents, briefing and bulletins and any document that will likely be forwarded to French speaking recipients such as Canadian association members. Emails that are expected to be forwarded to French recipients are also sent in both languages. The Board and associations were notified in February that any document that is not initially translated can be translated on request within one or two days.

Policy Initiatives to Reduce Added Sugar Consumption – Assessing the Threat to Maple Industry - Serving Size. The IMSI Board of Directors closely monitored, informed its members, and organized discussions regarding the FDA’s initiatives to decrease added sugar consumption. These initiatives are likely to affect consumer demand for pure maple syrup and bring about more reduced-sugar products in the sweetener/topping category threatening pure maple syrup’s market share and usage if diluted or blended syrups cut into the pure maple syrup sales.

In a first phase, the FDA’s new nutritional label guidance (June 2019) added the line ‘added sugar’ and a % daily value and it made the CALORIES word and line exceptionally large and prominent on the label. The IMSI contested the use of an unqualified added sugar because it was very confusing and won concessions leading to a revised, more favorable guidance for labeling of single-ingredient sweeteners.

Subsequently, the FDA launched a public information campaign in collaboration with the American Academy of Pediatrics (AAP) and the American Medical Association (AMA). A series of videos and materials is available



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online to instruct physicians and schoolteachers on how to use the new NFP label to help adult patients, their children and students make informed dietary choices. Reducing added sugars makes up about 1/3 of the subject matter and notably, videos promote replacing maples syrup and other sweeteners by fruit on foods like pancakes, cereal, etc.

A further threat has surfaced. In October 2020, the Dietary Guidelines Advisory Committee (DGAV) recommended calories derived from added sugar be lowered from 10% to 6% of the maximum total recommended daily calories. If such a change is adopted, it would likely have negative consequences for sweeteners. For maple syrup, 10% represents 50 grams of sugar. If the maximum calories changed to 6%, it goes down to 30 grams of sugar. Based on a serving size of 24 grams, the *daily value of sugars would go from the current 48%² to above 80%*. Thus, the DV% of sugar on a bottle of maple syrup would indicate 80%. Note that a number of health authorities around the world recommend less than 10% in their guidance.

It appears that most consumers concur with public health recommendations regarding added sugars. A large body of concurrent research data indicates that consumers want to reduce calories and added sugars. For example, 77% of U.S. consumers are trying to limit/avoid sugars and according to the NPD Group's Health Aspirations and Behavioral Tracking Service, nearly 90% of US adults read nutrition labels. Approximately 45% of consumers look at calorie content on nutrition labels while more than half (57%) of US adults look for sugars. This points to a persistent and increasing trend of sugar reduction.

Given these public health initiatives and consumer attitudes, the IMSI is trying to understand the potential impact on consumer attitudes, behavior and buying, as well as the impact of the changing competitive set, for example, how more calorie reduced offerings will affect sales. One marketing-communication option right on the package is to reduce the serving size in the United States through an FDA petition supported by data. This depends on proving that the current serving size overrepresents the average amount consumed per occasion.

If the serving size could be reduced, say to 15ml, the calorie count would be halved to 55 calories and the DV would be approx. 24%. This would in theory, benefit maple syrup by making maple more acceptable with the lower calory count as well as more competitive compared to calorie-reduced sweeteners and toppings as well honey, the number one sweetener.

The IMSI Board has yet to decide or draw up an action plan to pursue any marketing strategy or other approaches but the year 2020 will have been characterized by much discussion about the threat of the proverbial 'war on sugar'. An IMSI paper summarizing some of the issues and listing relevant research and data was circulated to members in November to help conceive of an appropriate response to these threats.

² Currently the FDA's nutrition guidelines recommend that no more than 10% of your daily calories come from added sugars. The Daily Value for added sugars is 50 grams per day based on a 2,000-calorie daily diet. One maple syrup serving is 30ml (2 tbsp.), therefore adds 24 grams of added sugar to your diet and represents 48% of the daily value for added sugars and 110 calories.



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Regulatory Issues and Market Trends – In 2020, the Normandy Group’s John Goldberg frequently discussed regulatory trends and issues and FDA guidance as well as foreseeable regulatory issues facing the maple industry and the FDA dietary initiatives. Members engaged in an interesting discussion on the expected dietary guidance and media attention to added sugars. Baily Richterman presented some marketing slides, the most salient of which illustrated that sugar and calories are the top two items consumers are checking on the label. Her presentation concluded that the trend for consumers to become more health and calorie conscious is likely to continue to increase.

Retention of Government Relations Service. In July 2020, the IMSI renewed its retainer agreement with Dr. John Goldberg of the Normandy Group in Washington D.C. who will monitor and lobby U.S. Federal Agencies and Congress as well as maintaining working relations with elected representatives and staff on Capitol Hill. Goldberg will help inform and guide the IMSI’s strategy about regulatory matters.

The IMSI Executive Director worked with John Goldberg on several issues and communicated all matters of importance to the board. They collaborated about the development of the Standard of Identity, Nutrition Facts Panel, Food Safety Modernization Act (FSMA) and other ongoing files. John Goldberg provided regular updates to the board and presented to the Board at meetings as well as sending the IMSI several updates on the US Governments communication and programs connected to the pandemic crisis.

IMSI Administration

Fee collection was improved and successfully conducted by the IMSI bookkeeper in the first quarter with all communication issued from her office making it a more efficient, single point-of-contact operation whereas the ED was involved before. The 2020 budget was administered by the IMSI treasurer and the 2019 financial operation was audited by an internal, independent committee made up of Jacques Couture, Steve Selby, and Mark Bigelow.

Translation Services - The IMSI is using a free online translation service. No expenses have been incurred in 2020 for translation resulting in substantial savings and better communication with our French members.

IMSI Governance – The IMSI arranged the appointment of new Directors on the Board to ensure the long-standing operational criterium of having a strong and engaged group fully representing the many sectors of the industry. A revised slate of Courtesy Members and Consultants was also table at the October 30th AGM.
