



MINUTES AND HIGHLIGHTS - International Maple Syrup Institute (IMSI) Board of Directors Meeting and Duluth Convention Duluth Minnesota, October 21, 2019,

IMSI Board of Directors Meeting at DECC Oct. 21, 2019, 08:30 to 13:45

Pre-amble - The maple industry met in Duluth October 20 -24, where the Minnesota Maple Syrup Producers' Association hosted *Superior Sweetness*, the annual general meetings and conference. The IMSI was thankful for the opportunity to participate and to hold our AGM and 4th board meeting of the year at the conference. We are very grateful to the volunteers, planning committee members and to co-chairs Shelly Carlson and Stu Peterson who gracefully hosted the event.

PRESENT

Steve Andersen – *Andersen's Maple Syrup*; **Bruce Bascom & Mathew Bascom**, *Bascom Maple Farms*; **Avard Bentley** – *Nova Scotia MSPA*; **Yves Bois** - *Centre Acer*; **Phillippe Breton** – *Lapierre Equipment*, **Ray Bonenberg** - *IMSI President*; **Mark Cannella** – *University of Vermont Extension*; **Daniel Dufour** - *Conseil de l'industrie de l'érable*; **Martin Désilets** - *Dominion & Grimm*; **Brad Gillilan**, *Leader Evaporator*; **Mark Isselhardt** - *University of Vermont*; **Jean Lamontagne** - *IMSI Executive*; **Jason Lilley** – *University of Maine Extension*; **Gary Graham** - *Ohio State University* **Pamela Green** – *Vice President, IMSI*; **Richard Green** – *Green's Sugarhouse, VT*; **Mark Harran** - *IMSI Past President*, **Luc Lagacé** – *Centre Acer*, **Lyle Merle** - *New York State MSPA*; **Lyle Merrifield** - *Maine MSPA*; **Dave Kemp** – *New Hampshire Maple Producer's Association*; **Emma Marvin** – *Butternut Mountain Farms*; **David Marvin** - *Butternut Mountain Farm*; **Richard Norman** - *Norman's Sugar House*; **Martin Pelletier** – *Centre Acer*; **Timothy Perkins** – *UMV & Proctor Maple Research Center*; **Louise Poitras** - *New Brunswick MSPA*; **Fred Richards**, *Ohio Maple Producers*; **Andy Schmidt** – *Winsor Hill Sugar House*; **Helen Thomas** – *New York State Maple Producers*; **Simon Trépanier & Guillaume Provost** – *Producteurs et productrices acéricoles du Québec (PPAQ)*; **Abby van den Berg**, *University of Vermont*; two other researchers plus another, **Tom Zaffis** – *1st Vice-President IMSI & Turkey Hill Sugarbush* . .

REGRETS

Mark Bigelow - *Maple Grove Farms*; **Eric Côté** - *L.B. Maple Treat Lantic*; **David Campbell** - *IMSI Treasurer*; **Jacques Couture** - *Couture's Maple Shop*; **Mike Farrell** – *The Forest Farmers*; **John Garwood** – *Market and Consumer Researcher*; **Katheryn Hopkins**; *University of Maine, Coop Extension*; **Daniel Lalanne** - *CDL*; **Rick Lavergne** - *Citadelle Cooperative*; **Mary Jeanne Packer**; *Mapleland Farms*; **Steve Selby** - *AEC Specialty Products*; **Adam Wild** - *Cornel University*.

Welcome and call to order – 0830Hrs - Ray Bonenberg, IMSI President recognized the excellent venue, thanked the organizers and welcomed the group. Round table introductions followed.

Approval of Minutes: Aug 8, 2019 Lake Placid Board Meeting – Motion to approve minutes as circulated by Richard Norman seconded by Pam Green carried.

Additions to the agenda – None

Approval of the agenda – Motion to approve the agenda as circulated by Pam Green seconded by Tom Zaffis carried.

2019 Financial Update – Jean Lamontagne read out each the account balances cumulating to 67,000 USD and discussed the possibility of saving translator fees (\$1,500 to \$2,000 CAD/yr.) by using translation software.

The Quebec members mentioned the importance of receiving some (select) documents in French so they can inform their own constituents the IMSI's goals more effectively. Jean Lamontagne committed to consulting about which documents to send in French and doing so. It was also mentioned that the IMSI website is now out of date with respect to information, SEO structure and that the French section, although once available, is offline.



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Next steps: Get the software and send important documents to French members in their own language. Translate necessary documents. Propose a plan to review and upgrade the website and repost the IMSI French component - completion in 2020.

IMSI Membership Report – Jean Lamontagne mentioned that all the larger organizations paid their dues. A few additional follow-ups needed for smaller members.

Next steps: It was mentioned that a work group be formed to identify and solicit new members – this will be taken up at next executive committee meeting.

Open Discussion – How to Improve Maple Syrup Quality - The board members discussed the issues with variations of maple syrup quality. Although the overall quality of maple syrup is good, there remains some potential for improvement. It was noted that there is a 'quality drift' due to new technology enabling a much faster pace of production (RO and evaporator speed). If the monitoring process is neglected during production and quality drifts, a large quantity of off-spec syrup can go through before corrective measures are implemented during the processing. Additionally, there remains a lot of learning to do at the producer level, even with the basics of using the thermometer and hydrometer appropriately to control quality. It was mentioned that all too often the thermometer is not used to control the density of the samples and the hydrometer is only accurate at the calibrated temperature. Some packers noted that a larger proportion of maple syrup comes in at lower densities and that the incentive is to produce to color specs at minimum density. Also noted that there is the lack of basic research on flavor and organoleptic qualities. The question remains if the problem of quality is evident at the packer's receiving door or on the shelf. The Centre Acer analyzed a large number of incoming barrels and the PPAQ will begin an innovative communication strategy whereby each producer will receive a quality benchmark report comparing their product to the product from their immediate region and to the average of all production. This information is meant to inform producers innocuously, offering comparable benchmarks to measure improvements year-over-year.

Next Steps: There was no consensus on what to do and how important the problem is but there were some leads. The quality issue problem is different at the packer's door than when syrup is sold in smaller local markets. The impact of selling bad tasting syrup to consumers is unknown. The group resolved to take up this topic at next the board meeting.

Update IMSI Grading School and Centre Acer – Mark Isselhardt described one more year of successful Grading School year at UVM and Proctor. He mentioned that some people have expressed the interest in having one-day sessions but that the current two-day sessions are better and provide the required credential. Obtain an acceptable flavor remains an issue and a challenge for some producer. To expand the program, the possibility of train-the-trainer approach was discussed but it remains difficult to establish and teaching to target a certain acceptable flavor is difficult because there is no benchmark for flavor. It was mentioned that it's possible to more emphasis on flavor, for example by putting samples of a range of acceptable flavors in the training kits. The value of striving for flavor in production is not obvious due to the grading system centered on color and density. Simon Trépanier mentioned that Quebec producers invest in courses because they can make more money by learning and apply what they learn.

Centre Acer's extension department was also very active this year in 2018, giving 77 conferences and courses to an estimated total attendance exceeding 6100 participants. The grading school courses were very popular with 41 classes attended by 562 producers. Martin Pelletier mentioned among the many courses offered, Centre Acer has some specifically about flavor including information on how to sell flavor with tasting notes. Courses on improving quality are the most popular and an APP was developed to help with maple production related calculations. *Also popular was a course on sanitation - from tap to barrel - that puts the emphasis on the effect of a good sanitation on flavor and yield.*



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Vermont Agency of Agriculture (VAA) Permeate Analysis – Mark Isselhardt mentioned that phosphorus in wash water discharge is the issue that most interested the VAA and permeate second. Phosphorus is what they are most concerned about including thermal loading impact. This scrutiny came up originally by a producer dumping sap but also in consideration of the industry's increasing growth in Vermont - more than 2 million taps in the past year. VAA also seeing if phosphorus can be used to spread in the fields, looking at PHs and BOD and sugars residual in the wash water and efforts to neutralize pan acid. The VAA is tasked by the Vermont Department of Environmental Conservation (DEC) to craft regulations pertaining to this. Simon Trépanier emphasized that it is the industry's job to inform our members and promote good environmental practices.

Maple Research Update – PMRC/UVM's research update, Abby van den Berg mentioned that NAMSC would like volunteers to review the new edition of the North American Maple Syrup Producers manual - if you want to review the manual contact Abby or Tim Perkins at UVM. Abby reminded attendees that maple research is readily available at mapleresearch.org. UVM is doing research on optimizing yields, the impacts of tapping on tree growth and health, tapping practices to optimize yields and sustainability, and on aspects of forestry and business. A new project will focus on red maple as a crop tree, including research on yields and flavor.

Yves Bois & Martin Pelletier mentioned that the *Centre Acer* team is working on a new document specific to technology transfer called *Cahier de transfert technologique en acériculture* (CTTA). This is a comprehensive four-part book that will address technical aspects of sugar making. The first part will address reverse osmosis and evaporation and a new section on forest management. The laboratory equipment upgrade project is still pending funding approval; they expect a positive response shortly. Centre Acer is completing its 2020-2025 strategic plan with a focus on researching the flavor aspects of maple syrup, its composition and its compliance with international regulation. On the research side, the Acer team published 5 scientific articles in 2018, including a scientific report about the sap constituent leading to buddy maple syrup in the renowned scientific journal, Nature. The team also conducted 29 private research projects and 27 public ones.

Normandy Group Appointment - Retention of Government Relations Consulting Services (U. S.) - The IMSI acted on a motion at the previous board meeting to retain the Normandy Group in Washington D.C. to monitor and lobby U.S. Federal Agencies and Congress, the U.S. legislative body as well as maintaining working relations with elected representatives and staff on Capitol Hill. The Normandy Group will inform the IMSI of pending regulations and other Federal Agency activities that could pose a problem or present opportunities for the maple industry and will assist the IMSI in projects where their expertise is pertinent such as the added sugar issue and standards. The complexity of government regulations and potential impacts are deemed too great to have no monitoring oversight. *This service will help the IMSI and its members be informed and proactive; a prudent move for the US and Canadian maple industry.*

Regulatory Monitoring Update - A report will be provided to members summarizing political and agency activity related to maple production and marketing. The Normandy Group provided expertise and guidance to the IMSI throughout the 'added sugar' issue and represented the IMSI with Emma Marvin at a meeting with the FDA in Washington as well as other scheduled meetings with legislators and staff.

Update FDA Meeting/Added Sugar Label Guidance – A lot of work by Emma Marvin and John Goldberg went into the preparation of this meeting including drafting many label mock-ups and listing potential alternatives to 'added sugar'. The IMSI is very thankful for their contribution. Emma described the October 10th meeting as a positive step to build a working relationship and engage with the FDA on regulatory matters in the long term. Expectations were low about having the FDA approve suggested alternatives to the phrase "added sugar" in the footnote immediately at the meeting because the *Honey Industry Association* had presented similar requests the previous week to no avail. A follow-up letter with a specific request would be needed.



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At the IMSI board meeting in Duluth, members discussed the drafting of a follow-up letter to the FDA specifically requesting confirmation that an explanatory footnote such as the one below will be recognized by the FDA as truthful and not misleading: † *One serving adds 24g of sugar to your diet and represents 48% of the Daily Value for sugars added to your diet.* The phrase was approved unanimously.

With approval from the board, the IMSI sent a letter on October 31st which essentially stated the following:

The IMSI is grateful that the FDA has published non-binding guidance that the phrase “added sugar” would not be required in the regulated portion of the nutrition facts label. However the FDA’s guidance instructed that an otherwise unidentified percent daily value would be required to appear on a blank line below the amount of total sugar on the nutrition facts panel for maple syrup. This orphaned floating daily value percentage would have no required explanation. The IMSI remains concerned that the orphaned, floating percent daily value would suggest to consumers that pure maple syrup producers included a typographical error on their labels, thus exposing producers to consumer complaints. The FDA offered in guidance that producers could voluntarily use an obelisk (†) by the orphan percent daily value and include an explanatory footnote explaining that this refers to a percent daily value of “added sugar”. We remain concerned that consumers reading this phrase would assume sugar is added to pure maple syrup.

The IMSI is still hopeful that an accommodation can be reached allowing for an explanatory statement that avoids use of the phrase “added sugar”. In that the FDA has described added sugars as the amount of sugar contributed to one’s diet, we are requesting that the agency provide confirmation allowing the use of an explanatory footnote referring to sugar added to one’s diet, thus reducing consumer confusion related to the phrase “added sugar”: † *One serving adds 24g of sugar to your diet and represents 48% of the Daily Value for sugars added to your diet.*

Next steps: We are awaiting a response and will inform our members of the outcome and recommended action as soon as possible.

Serving Size Regulatory Discussion

The topic of serving size was broached at the IMSI/FDA meeting in Washington. The FDA advised that a specific set of data demonstrating the actual average size of maple syrup consumption per serving would be need to authorize change.

RECAP: The FDA recommends that no more than 10 percent of your daily calories come from added sugars. That's 50 grams for an adult on a 2,000-calorie diet. The FDA maple syrup serving size is 2 tbsp. (approx. 30ml or 1/8 cup or 24 gr.). Therefore one serving adds 24 grams of sugar to your diet and represents 48% of the daily value for added sugars. Honey is in a different category, with the reference amount of only 1 tbsp. (half that of maple syrup), it contributes only 24%, or half of the daily added sugar that maple syrup does. Canada’s serving size is larger at 60 ml equivalent to 48 grams of sugar per serving. However the maximum daily value allowed by the CFIA is 100 grams, so the % Daily Value is the same as the U.S., notwithstanding the larger serving size. If the current U.S. daily allowance for sugar was adopted in Canada without changing the serving size, it would represent 98% of the daily value for sugars.

A discussion about reducing the serving size occurred with the following comments made:

1. Since packages destined for the U.S. and Canada have different labelling requirements, harmonization will not help rationalize labels.
2. Members mentioned that having a smaller serving size is a significant advantage because sugar percentage is the most obvious and salient nutritional reference for consumers of maple syrup. Dropping the %DV to 24%



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in the U.S. is believed by many members to be an advantage because consumers are increasingly aware of their sugar intake and more discriminating about the sources of sugar in their diet

3. The proportion of maple syrup used as an ingredient (vs. serving on pancakes) is increasing thus smaller quantities are used (much like honey). For example maple syrup is used in tea, coffee and other beverages, baking, salad dressings and sauces while the sit-down large breakfast occasion is decreasing. There is an opportunity for maple syrup marketers to promote its distinct attributes with the added advantage of a smaller and more appropriate label serving size.
4. Reducing the serving size would reduce the % daily value of minerals and vitamins found in maple syrup. It would appear less nutritious. It would also preclude using certain nutritional claims; for example in Canada *Excellent source of manganese / riboflavin good source of copper / calcium* would be reduced to lesser claims such as "contains..."

CONCLUSIONS: There are two opinions among members, one sees reducing serving size as an advantage while the other considers the promotion of nutritional content (vitamins and minerals) outweighs the high sugar. Although reducing the serving size is intuitively appealing and secondary data and current consumer and public nutritional policy trends point to more focused attention on reducing sugar in the diet, no primary research was presented to support this. The question; do the benefits of a marketing strategy based on promoting the nutritional contribution of vitamins and minerals outweigh high sugar values on the label is not answered. Also, the presumption that the true, current average serving consumed is lower than label serving sizes has not been investigated by research data. For the moment Canadian and U.S. dietary trends and regulations are different. Should we expect that the dietary issue with sugar consumption will become even more salient and result in significant change in consumer attitudes and usage and public policy and food regulations? What consequences would this have on maple syrup marketing and communication strategies?

Next steps: Take it up again at next meeting. Determine if a majority of U.S. members wish to move in that direction. Review necessary steps to initiate this change and discuss decision criteria. The situation in Canada is different. Probe Canadian industry to determine if there is a desire to change the Canadian reference amount and what information would be needed to define a marketing strategy that could accommodate a smaller serving size and compelling nutritional information.

Fee Structure, Final Membership Fee Package for Approval and Commission Report – Ray Bonenberg

Ray Bonenberg went over the Commission report and reminded the board that they approved the budget framework of the document to reach \$100,000. Daniel Dufour proposed that the IMSI CIE members pay their dues via the CIE. The equipment manufacturers suggested a different rate scale than the one proposed. In general, the associations are willing to put forward the increase to their own board members and most think it will pass. Ray mentioned that he is going to present and explain the IMSI to the PPAQ board members on November 5th with Jean Lamontagne. This should be beneficial to their understanding of the functions and importance of the IMSI for the industry.

Next steps: Ray and Daniel to draft an agreement detailing the new arrangement. Ray and manufacturers to draw up new rate structure. Once agreement is reached, hold an electronic vote on the motion of approving the fee final fee structure.



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IMSI 2019 Awards presented in Duluth.

The IMSI's *Golden Maple Leaf Award* was presented to Julie Barbeau of the Quebec Maple Producers (PPAQ) in recognition for her outstanding leadership in innovation and market development. Julie manages research projects and has contributed to significant advances in the knowledge of the nutritional properties of maple products. She has consolidated and worked with a network of international researchers that have published over 60 scientific articles on the nutritional value of maple products.

The IMSI's *Lynn Reynolds Memorial Leadership Award* was presented to George Cook of the University of Vermont Extension in recognition of outstanding leadership and performance in education and extension activities. George's unique blend of passion for all things maple and friendly and approachable attitude towards sharing information and knowledge with maple producers has resulted in better informed producers and higher quality product in the U.S. and Canadian marketplace.

IMSI Presidents awards were presented to three outstanding contributors to the maple industry for their dedication and contribution to advance International Maple Syrup Institute initiatives.

Dr. Abby van den Berg, research assistant professor at the *University of Vermont's College of Agriculture and Life Sciences* is a researcher focused on the chemical composition and flavor of maple syrup, particularly on gaining a better understanding of the compounds important to its flavor profile, and on how factors such as the environment, processing technologies, and management practices might affect its composition and flavor.

Kathryn Hopkins, extension educator at the *University of Maine Cooperative Extension* is an expert resource for the Maine maple syrup industry and is responsible for Agriculture and Natural Resources programming statewide. She coordinates and presents trainings and workshops; authors educational material and conducts research on maple syrup sap and syrup production issues. She is one of the original founders of the IMSI Maple Grading School that has been presented annually since 2004.

Dr. Luc Lagacé is a researcher and R&D team leader at *Centre Acer*, responsible for maple products and processes research. The team's research supports business projects in innovation, technological development, and training and provides practical guidance to solve problems ranging from maple syrup density adjustment with refractometer and hydrometer to the effect of sap aeration on buddy maple syrup taste defects.

Nomination Report - The IMSI elected new members to build a strong executive team with diverse expertise and skill sets. Pam Green of Vermont was appointed President of the IMSI. Pam is a successful Vermont maple producer and past president of the Vermont Maple Sugar Makers Association. Tom Zaffis of Turkey Hill Sugarbush was appointed 1st Vice-President. Additionally, Mike Farrell of New Leaf Tree Syrups joined the IMSI executive. Ray Bonenberg will continue to serve on the executive team in the capacity of past President.

Election of IMSI Directors for 2020

There were no changes to the current board members list which was proposed. Motion to approve the board members by Louise Poitras seconded by Andrew Schmidt carried.

CODEX and Standards of Identity - The Duluth board meeting hosted a discussion on standards of identity and the pending CODEX application. The IMSI is currently engaged in harmonizing the U.S. federal and state and Canadian Standards of Identity so that: 1) the statutes do not conflict with each other 2) they are sufficiently aligned to proceed with an international Codex application. It was discussed that at minimum, New York and Vermont are closely aligned. The participants noted that there are substantial differences in the definitions that



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necessitates a careful review and possibly a revision of the 'ideal' standard of identity for the industry to use as a benchmark to propose amendments to varying versions.

A reminder, the Codex Alimentarius is a repository of internationally recognized standards, codes of practice, guidelines, and other recommendations relating specifically to foods, food production, and food safety. Tolerances for pesticide residues, contaminants, and food additives developed by Codex offer an opportunity for countries to harmonize country requirements and thus improve international trade. It is useful importers and exporters because it facilitates trade and forms the basis for protection of the genuine nature of the product in case of fraudulent marketing and adulteration. Ultimately, the industry's objective is to have maple syrup uniformly recognized as a pure product from sap with no additives and to remove the possibility of preservative use and labelling as this disqualifies 'pure'. Ideally all definitions will be consistent for all world markets.

Next Steps: Form an advisory committee and draft and ratify a definition. Then seek to amend definitions in specific jurisdictions and then to apply for CODEX. Helen Thomas has kindly volunteered to identify the existing standards and work with the ED to advance this project.

Adjournment – The meeting was adjourned at 1335hrs

Addenda

Ray Bonenberg, inducted into Maple Hall of Fame – An the banquet evening in Duluth on October 23rd, it was announced that IMSI President Ray Bonenberg will be inducted into *the Maple Hall of Fame at the American Maple Museum Center* in May 2020. Ray served for three very busy and productive years as IMSI president. Ray is a highly principled and talented leader who works tirelessly to advance the interests of the industry. He provided leadership in the successful resolution of the 'added sugar' and California Proposition 65 issues and many other critical industry initiatives. Ray also recognized that the issues and challenges facing the maple industry are becoming more frequent and more complex. Thus, he initiated the IMSI's Commission Report; a study to ensure that the IMSI remains fully relevant and highly effective in serving the needs of the North American maple industry. This resulted adding more resources and critical strategic functions to IMSI so the maple industry is able to respond to the fast-changing social, trade, environmental and regulatory environment. Ray will continue to serve on the IMSI executive as past president. The maple industry is lucky to *tap into* Ray's outstanding level of energy: thank you Ray!

UVM has a program that can help producers with business management. Mark Cannella, Farm Business Specialist (University of Vermont Extension) attended the meeting and explained that running a maple operation is difficult enough and simultaneously working on the business side is a challenge.

UVM Extension offers a variety of maple business education programs. This includes a *new maple business resource website* that will make business planning templates and business calculator available to online users. *UVM is also expanding the maple benchmark program into NY, NH and Maine.* This program pairs maple business owners with and adviser to complete an annual cost of production analysis. Individual participants receive private consultation through the process. The financial records of all participants are anonymized and this information is used to develop public reports and presentations on maple finance and economics.

Producers who want to improve their financial results should inquire about this program. Here are some of the issues and trends that maple entrepreneurs encounter in managing a maple business:



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- Both smaller scale enterprises with higher costs and larger enterprises (whom decide to invest in marketing internally) are seeking ways to differentiate their products and engage in more direct marketing.
- Bulk only producers from ~5,000-15,000 may be finding themselves in a tough situation if market prices drop near \$2.00 per pound.
- Recent benchmark research indicates an average cost of production in this scale to be ~2.25-\$2.40 per pound. If bulk prices persist below this levels, these owners are unable to break even.
- Lenders appear very positive towards maple enterprises for applicants with sound business plans.
- An aging group of maple business owners (55yrs+) are needing to prepare for business succession, transfer or exit.
- An increasing number of producers are seeking ways to specialize with business to business relationships like selling/buying raw sap or selling/buying finished syrup to each other.

If you want more information please go to <https://www.uvm.edu/extension> or call the UVM extension at 802-476-2003.

The subject of maple industry information was discussed at various times in the meeting and in other circumstances. For example, it was discussed that the industry, via the IMSI, could use some data on the economic activity on the maple business such as an **Industry Profile**. An industry profile is a report or gathering of data centered on the maple business that outlines and describes its major components, usually providing an overview of the industry and projections about future trends.

Also mentioned was the possibility of having some **market trend data** such as scan data to understand the sweetener and substitute sweetener categories. From an industry perspective, it is important to identify threats like growing competing products and trending opportunities that can be observed easy with scan data analysis.

A **segmentation analysis** was also discussed as it could help understand the usage and attitudes of maple syrup consumers, providing useful marketing insights.

Next steps: IMSI to identify sources of such information and present to the board.
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For more information, contact the writer:

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