



International Maple Syrup Institute
Report from IMSI Board of Directors Meeting
Sheraton Hotel, Ottawa, ON

August 2017

Introduction:

The IMSI Board of Directors held their quarterly meeting at the Sheraton Hotel in Ottawa on August 18th. The meeting was chaired by IMSI President Ray Bonenberg who welcomed the attendees to Ottawa's National capital. Some highlights from the meeting included selection of an international promotional slogan for real maple products, preparations to launch the IMSI's Social Media Promotion and Marketing Campaign, helping address issues with the FDA Nutritional Facts Panel (including the Added Sugar line Provision) and the Health Canada Proposal for Front-of-Package Labeling as well as facilitating and assisting work on development of an application for International Codex Certification for Maple Syrup.

Formal minutes from the August 2017 IMSI Board of Directors meeting will be available at a later date.

Supply, Demand and Pricing of Maple Syrup:

Production of maple syrup in 2017 was similar or higher than the 2016 level in many jurisdictions. In Quebec, the 2017 production exceeded 2016 output by 4 million pounds.

Prices of retail maple syrup have remained stable but competition is strong, especially among packers/processors. Recent company mergers suggest that there is a move to offset tight profit margins with increased economies of scale. For example, over the past year Great Northern Maple and Highland Sugarbush were purchased by L B Maple Treat. More recently, L B Maple Treat was purchased by Lantic Sugar to add a natural sugar line to that company's sugar products spectrum. Some expect this trend towards mergers to continue into the foreseeable future.

There is growing concern regarding whether or not increases in demand will be able to keep up with production increases over the next few years. This points out the importance of continuing to develop new markets for maple syrup both in North America and overseas and is supportive of the IMSI's efforts to help bolster promotion and marketing efforts. For example, with the fast-paced lifestyle of young people, there is ample opportunity to work towards full integration of real maple into fast food offerings as well as restaurant menus.

Some of the main factors which could affect the North American Maple industry going forward are the level of growth in markets, supply versus demand, the Canada-US exchange rate and trade agreements. Efforts directed to helping maintain a reasonable balance between supply and demand will be especially important over the next few years.

Development of an International Slogan and Messaging Themes for Maple Syrup:

The IMSI continued work on the development of an international slogan and the identification of messaging themes to be used in the promotion and marketing of maple syrup. The slogan is intended for use as an overall brand in website, literature and social media approaches.

The IMSI Slogan and Messaging Themes Task Team identified five potential overarching slogans for the North American maple syrup industry and solicited input on these slogan options in a round of consultations in 2017. The IMSI also requested input on suggested maple messaging themes, which the IMSI and individual IMSI members

should place emphasis on in their promotion and marketing efforts in the future. The results from these consultations are available from the IMSI's Executive Director upon request. At the meeting in August, on the recommendation of the IMSI Task team, the IMSI Board of Directors selected a final overarching international slogan for the Maple Syrup industry, which can be adapted for different real maple products. The slogan is "*Real Maple Syrup – A Natural and Nutritious Choice*".

IMSI Launches Social Media Campaign:

In May of 2016, the IMSI Board Directors voted to engage social media to help advance objectives. Brad Gillilan from Leader Evaporator is leading the IMSI's Social Media Task team that has IMSI membership representation from both Canada and the United States. The IMSI's Social Media Plans are consistent with the Institute's approved Marketing Implementation Plan which is a very important reference. A planning document has been prepared to guide the IMSI's engagement in Social Media. A detailed implementation plan outlining a set of guidelines for launching messages strategically was also developed and the IMSI media campaign was launched in September of 2017. Messaging themes will be altered monthly or bi-monthly throughout the year. The intent is that consistent messaging will be made available to IMSI members and others who have a social media presence and following.

September marks the start of the IMSI's new Social Media Promotion and Marketing Initiative titled "Tapping Into the Passion for Maple." A PowerPoint Presentation (English version) highlighting efforts of the IMSI Social Media Task Team is now available and will soon be posted on the IMSI's website www.internationalmaplesyrupinstitute.com with a quick link from the site homepage. We encourage you to access and share the PowerPoint with maple syrup producers, maple packers and others.

The IMSI has initiated a facebook page [facebook.com/internationalmaplesyrupinstitute](https://www.facebook.com/internationalmaplesyrupinstitute) and has agreed to key themes for 3 month periods which will be refreshed on an ongoing basis. For example for the next 3 to 4 months, the messaging themes will be "**The Colours of Maple**" and "**Sharing Maple with Family and Friends**". This is intended to take advantage of the upcoming fall colour season and then the holiday Thanksgiving and Christmas periods. Weekly posts on specific topics related to those themes will be posted. Maple associations, maple packers and others are encouraged to utilize the material and themes as shared by the IMSI, but they are not required to do so if they choose other approaches.

Brad Gillilan will be the IMSI's keynote speaker describing the social media initiative at the Annual meetings of the IMSI and the North American Maple Syrup Council in Levis, Quebec on Monday, October 23rd. Please help us raise awareness regarding this upcoming presentation.

IMSI Standardized Maple Grades and Nomenclature:

The state of Wisconsin approved regulatory amendments aligned with the IMSI's proposal for standardized grades and nomenclature in 2017. Ontario is moving through a transition year towards full implementation on January 1 2018. The Federal governments in both Canada and the United States as well as all states and provinces with maple grading regulations have now adopted the new grade standard. While the new international grading and classification standard has now been formally adopted in regulation, maple producers and packers/processors are strongly urged to reference the federal and state /provincial regulations regarding the very specific labelling requirements. For example, New York State is currently requiring that the word "color" be included as part of the label description within that state.

In general, adoption and implementation of the new grade standard for maple syrup has been smooth and feedback to the IMSI has been very positive. A few concerns have been expressed regarding very specific provisions in individual regulations.

Codex Application for Maple Syrup:

Codex Alimentarius is an international certification program for food products which are sold in markets around the world. It provides a definition for various food products and outlines food quality and safety assurance standards which are the accepted norm for a variety of different food products. This will help protect consumers' health and ensure fair practices in food trade. Key provisions included under Codex are food hygiene, maximum residue limits for pesticides, food additive provisions and guidelines on food labelling. Codex relies on joint FAO/WHO scientific advice to establish food standard. Codex registration should help the maple industry gain protection from fake maple syrup and the use of false ingredients. A Codex certification for maple syrup would also help raise awareness regarding the definition of pure maple syrup and quality assurance standards among government officials in global markets. Over time, it would also help elevate awareness regarding the uniqueness of maple syrup among consumers around the globe and help position the maple industry for market expansion in North American as well as overseas markets. It should help position the maple syrup industry for growth in sales outside of continental North America. Now that there is a standardized North American grading and classification system in regulations for maple syrup, it is serving as a very important building block for the maple industry's Codex application.

The IMSI in collaboration with the Federation of Maple Syrup Producers in Quebec will be applying to the international body responsible for Codex applications to obtain Codex certification for maple syrup. The Federation of Maple Syrup Producers in Quebec is serving as the lead IMSI member in developing the application with input from the IMSI Board of Directors as required. The Federation is also serving as primary liaison with the Canadian government on this file. The Canadian government is very supportive of a Codex application from the maple industry and is willing to help stick handle the application. The FDA and USDA have also been made aware of the Codex initiative and their input is being sought in advance of filing the application. Representatives of the Canadian government presented on Codex at the IMSI's Board of Directors meeting in August 2017 in Ottawa. The representative from Agriculture & Agri-Food Canada advised the group that it may take from 3 to 8 years for a decision to be rendered on the Codex application since it requires a multi-country consensus which takes time.

The Federation has prepared two supporting documents for the Codex application for maple syrup which were presented by Simon Trepanier of the Federation at the IMSI Board meeting on Friday, May 12th in Croghan, NY. These documents have been distributed to the IMSI's Board of Directors for comment. A copy of the Codex Application documents can be obtained from the IMSI's Executive Director upon request.

Maple Water Labelling Recommendations and Related Research:

In 2015, an IMSI Maple Sap Water Committee chaired by Lyle Merle developed labeling recommendations for maple sap water products in consultation with maple sap water companies. These recommendations were distributed to government regulatory authorities in both Canada and the United States following their approval by the IMSI Board of Directors. In December 2016, the FDA responded formally to the IMSI's recommendations. FDA interpretations do not align well with the IMSI's recommendations. Consequently, the IMSI will be applying formally to FDA seeking amendments which are in alignment with the IMSI's position. Before a formal application is put forward to FDA, the IMSI will conduct another round of consultations with IMSI members and representatives of the maple sap water industry.

The IMSI has also been active in working in an attempt to facilitate attempts by maple researchers from Centre Acer and the University of Rhode Island to secure financing for developing a standard of identity for maple sap.

Findings from this research would be very helpful in advancing the development and expansion of the maple sap water industry in North America.

Working to Harmonize Nutritional Information on Maple Syrup Product Labels:

In 2016, concern was expressed that current nutritional labelling of maple syrup is quite variable and that it would be very advantageous to develop harmonized labeling specifications that are ready for the roll out of new FDA labelling requirements. Harmonization would set one standard for industry application in the United States, removing inconsistencies and some confusion, which is associated with existing labels. The IMSI has been facilitating follow-up with Maple Quality Assurance Specialists employed by Maple Packers and Maple Researchers from both Canada and the United States with the aim of coming up with standardized nutritional label specifications for maple syrup and maple sugar. Draft generic nutritional facts panel label provisions for maple syrup and maple sugar have now been developed by the maple industries' quality assurance specialists with input from maple researchers at UVM, Proctor and Centre Acer. Some details are still being worked on, such as attempts to align the serving size for maple syrup. Consultations with the federal governments in both the United States and Canada also are continuing.

Working to Address the Added Sugar Issue with FDA and Health Canada Front-of-Package Labeling :

US – FDA :

The IMSI has also been in ongoing liaison with the FDA regarding the "Added Sugar" line requirement on the new FDA Nutritional Facts Panel (NFP). Since FDA was unreceptive to providing an exemption for maple syrup to the added sugar requirement, a Task Team led by Emma Marvin of Butternut Mountain Farm developed options designed to explain to consumers what Added Sugar means (ie. added to diet) in case we cannot achieve an exemption to the requirement from FDA. More recently the IMSI formally requested a 5-year delay for the FDA NFP compliance dates. Subsequently FDA announced that there would be an extension and that details would be announced in the public Register at a later date. In August of 2017 the IMSI developed a formal position statement on the FDA's Added Sugar requirement, which is available from the IMSI's Executive Director upon request. At the same time, the IMSI formally advised FDA of the industry position and urged them to announce the length of the NFP extension as soon as possible so that producers, processors/packers and buyers of maple syrup understand and can plan for FDA's NFP labelling compliance requirements.

Canada - Health Canada:

Health Canada is proposing to put the equivalent of warning labels on the Front of Package (FOP) for all products that have above the daily value (DV) of sugar that humans should consume for a healthy diet. It is unlikely that the Canadian Federal government will move away from asserting that sugar is in maple syrup...we all know the % it contains. What is most troublesome is the method proposed. Health Canada (HC) was proposing, in earlier consultations, to put a warning stop sign on the FOP exclaiming the dangers of eating the product...something like cigarette packages and bleach. The IMSI, the Maple Industry Council (CIE) and the Canadian Industry Advisory Group (CDN Round Table), have been active in attempts to convince the Canadian government to modify this proposed approach to labelling. The government has made aware of our maple industry position and concern regarding maple misrepresentation in the marketplace.

Quality Assurance of Maple Products:

IMSI and IMSI members are continually working to help maintain the highest of quality standards in the production of maple syrup and other maple products. In 2016/17, quality assurance was a focal point for discussion ensuring ways to enhance current efforts and reach more maple producers with quality assurance awareness and training appropriate to their needs. It was agreed that enhanced awareness and education among producers continues to be very important.

The IMSI-sponsored grading school and quality assurance training offered by Centre Acer continue to be essential in helping maintain high quality assurance standards. In addition to these excellent training venues, state and provincial associations are encouraged to offer quality assurance workshops tailored to their specific needs. Those who have attended the IMSI sponsored grading school in the past, are encouraged to share their knowledge with their peers at the state/provincial level.

The organizers of the IMSI-sponsored grading school are also exploring opportunities to engage other educators in quality assurance training, including training related to the classification and grading of maple syrup.

Information about the IMSI-sponsored Grading School including confirmed School offerings and Registration details can be accessed on the University of Maine Cooperative Extension website

<https://extension.umaine.edu/maple-grading-school/>

North American Maple Contest Guidelines:

The IMSI has worked cooperatively with maple educators in Canada and the United States as well as the North American Maple Syrup Council to prepare and finalize contest guidelines for use by judges at the various contests in both Canada and the United States. In particular, there was a need to ensure that the contest rules were aligned with the new international classification and grading system for maple syrup. The maple contest and judging guidelines approved by the IMSI and NAMSC (May 2016), are increasingly being applied in the different states and provinces. A copy of the new North American Maple Judging Guidelines can be accessed on the IMSI's website www.internationalmaplesyrupinstitute.com For further information contact the IMSI's Executive Director at agrofor@ripnet.com

IMSI President's Award:

The IMSI's Board of Directors was unanimous in supporting the creation of a new, annual award called the IMSI President's Award. This Award is designed to recognize the ongoing contributions of individuals and groups who have made or are currently making a significant contribution to helping advance one or more IMSI program initiatives. The first recipients of this Award will be recognized at the NAMSC-IMSI Annual Meeting Banquet in Levis, Quebec in October.

The IMSI also continues to administer the Lynn Reynolds Memorial Leadership Award and the Golden Maple Leaf Award.

Upcoming IMSI Meetings :

The upcoming IMSI Board of Directors Meeting and the IMSI's Annual Meeting will be held on Sunday October 22nd and Monday October 23rd respectively at \ the Four Points Sheraton Hotel in Levis, Quebec. These meetings are being held as part of the NAMSC-IMSI Annual meeting Convention. Information regarding the NAMSC-IMSI

Annual meetings, including the Registration Form can be accessed on the IMSI website
www.internationalmaplesyrupinstitute.com

For further information, contact:

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