



Minutes - International Maple Syrup Institute (IMSI) Board of Directors Meeting Colchester Vermont, February 5, 2020

PRESENT

Fred Ahrens, Richards Maple Products & Ohio Maple Producers Association; **Bruce Bascom**, Bascom Maple; **Mark Bigelow** - Maple Grove Farms; **Phillippe Breton** – Lapierre Equipment; **Ray Bonenberg** - IMSI Past IMSI President & Ontario Maple Syrup Producer’s Association & Mapleside Sugar Bush; **David Campbell** - IMSI Treasurer, Mapleland Farms; **Jacques Couture** - Couture’s Maple Shop; **Mylene Denicolai**, Federation of Quebec Maple Syrup Producers; **Martin Désilets**, Dominion & Grimm; **Mike Farrell**, The Forest Farmers; **John Goldberg**, The Normandy Group; **Jean Lamontagne**, IMSI Executive Director; **Pamela Green**, President, IMSI; **Richard Green**, Green’s Sugarhouse, VT; **Mark Haran**, IMSI Senior Advisor; **Allison Hope**, Vermont Sugar Makers Association; **Mark Isselhart**, University of Vermont, **Dave Kemp**, New Hampshire Maple Producer’s Association; **Daniel Lalanne** - CDL; **David Marvin** Butternut Mountain Farm; **Emma Marvin**, Butternut Mountain Farm; **Lyle Merle**, New York State MSPA; **Richard Norman** - Norman’s Sugar House; **Mary Jeanne Packer**, Mapleland Farms; **Louise Poitras**, New Brunswick Maple Syrup Association; **Bailey Richterman**, The Normandy Group; **Andy Schmidt**, Winsor Hill Sugar House; **Steve Selby**; AEC Specialty Food Products; **Helen Thomas**, New York State Maple Producers; **Simon Trépanier**, Federation of Quebec Maple Syrup Producers; **Abby Van den Berg**, University of Vermont; **Adam Wild**, Cornell University;

PHONE: Steve Andersen – Andersen’s Maple Syrup

REGRETS

Avard Bentley – Nova Scotia MSPA; **Yves Bois** - Centre Acer; **Eric Côté** - L.B. Maple Treat (Lantic/Rogers); **Daniel Dufour** - Conseil de l’industrie de l’érable; **Katheryn Hopkins**, U of Maine, Coop Extension; **Lyle Merrifield** - Maine MSPA; **Rick Lavergne** - Citadelle Cooperative - MSPA; **Tom Zaffis** – Turkey Hill

CALL TO ORDER: A board meeting of the International Maple Syrup Institute was held in Colchester Vermont on February 5th 2020. The meeting convened at 0830 by President Pam Green. Self-introductions and roll call was carried out.

APPROVAL OF MINUTES – DULUTH OCTOBER 20, 2019

A motion to approve minutes by Richard Norman seconded by Mark Haran carried.

APPOINTMENT - MOTION TO APPOINT DAVID LALANNE (CDL) TO THE IMSI BOARD - ALL

A motion to appoint by Ray Bonenberg seconded by Richard Norman carried.

FINANCIAL - UPDATE FINANCIAL YEAR 2019 – BUDGET APPROVAL

IMSI treasurer Dave Campbell presented a report and proposed 2020 budget (see appendix). It is estimated that the new fee structure will generate \$77,000 in 2020 fees. This is short of the \$100,000 goal stated in the Commission Report. A membership drive will be initiated this year to attempt to make



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up the difference. The board will review the financial situation in October and recommend actions to adjust or remediate.

A motion to accept treasurer's report by Lyle Merle second by Martin Désilets was carried.

The budget proposed that the cost of meals for directors be paid by the IMSI. This was discussed and agreement that directors would pay their own expenses. *A motion to have directors pay for own meals by Richard Norman, seconded Bruce Bascom was carried. The budget line was changed from \$6,000 to \$2,000. -- Subsequently, a motion to accept budget for 2020 (with meals amount corrected) by Richard Norman, seconded by Andy Schmidt carried.*

An Internal Audit Committee was formed to provide oversight of the 2019 financial reporting and to comment on accounting policies and regulatory compliance and risk management policies. The committee will be made of Steve Selby, Jacques Couture & Mark Bigelow. *A motion to appoint the committee by Ray Bonenberg was seconded by Louise Poitras carried.* Committee will report at the May IMSI board meeting.

PERSPECTIVE - CONSUMER & MARKET INFORMATION AND USES

IMSI Executive Director Jean Lamontagne explained that two scheduled presentations will provide information about market research and scan data that could be helpful to the industry and its associations as well as to individual members in 1) formulating marketing communication strategy 2) steering product and packaging innovation 3) helping key account managers to influence buyers and get the right pricing and promotion mix 4) understanding the trends in the sweetener category, especially in terms of the negative health-sugar relationship 5) growth insights such as competitive products and categories & maple syrup consumer and non-consumer.

CONSUMER RESEARCH - IPSOS MAPLE SYRUP U&A PROPOSAL

IPSOS Simone Wilson and Kristen Owens explained how ISOS identifies and analyses consumer usage & attitudes in specific locations and groups them into comprehensible clusters (segmentation) to derive actionable marketing and communication strategies. The presentation was sent to members. Please contact IMSI ED for any questions or follow-up with the presenters. The group expressed interest in pursuing funding options further to enable study. The IMSI board will evaluate the proposal to obtain information about maple markets and consumers for its members.

NFP UPDATE - FDA GUIDANCE ON ADDED SUGARS SAMPLE OF UPDATED NFP

Jean Lamontagne reiterated that the IMSI recommends that maple syrup packages conform to the 2019 FDA guidance with the footnote option as per the FDA guidance issued July 18, 2019. The footnote avoids leaving the reader with no information about that DV%; it helps the consumer understand the %DV, otherwise it is 'orphaned'/not explained. It's also important that maple syrup packages comply



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uniformly and consistently in the market place. See below links for your reference¹. Note the deadline for compliance is July 2021.

A full explanation of the regulations and a sample off a compliant label sample was shared at the meeting and previously sent to IMSI members on February 1st and prior to that on January 11th. The label sample showed two nutritional elements, namely Calcium and Potassium. Simon Trépanier suggested that an NFP with more nutritional elements can be used, the IMSI will relay this information to members soonest.

Dr. John Goldberg noted that this guidance is a substantial win (exemption from putting 'added sugar' on the main NFP panel) for the industry and there is still hope to rephrase in the footnote note verbiage in future. But not before the guidance goes into effect July 2021. So for now, the guidance must be followed, any new developments will be commutated to members.

INDUSTRY DISCUSSION

- 1) Lyle of Merle Maple presented preliminary results on his research around darkening of maple syrup in various containers during storage. Further tests are required to validate. He asks for any jugs to be tested from dealers. Will bring to Oct meeting for evaluation by group and presentation of results.
- 2) The timeline chart for lead elimination in equipment was distributed. Notably, October 2020 is the year that the compliance finishes with all small size producers using only lead free equipment. Simon Trépanier mentioned the PPAQ is having to separate crop into compliance/noncompliance so that they can control destinations. PPAQ has 96% compliance. David Marvin requires the producer to sign the affidavit. He mentioned that ultimately, it is producer's responsibility to comply.

¹ The Declaration of Added Sugars on Honey, Maple Syrup, Other Single-Ingredient Sugars and Syrups, and Certain Cranberry Products: Guidance for Industry <https://www.fda.gov/media/127928/download>
The Nutrition Facts Label Declaration of Added Sugars for Single-Ingredient Sugars and Certain Cranberry Products - Simplified Declaration FACT SHEET <https://www.fda.gov/media/127968/download>



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- 3) Jean Lamontagne mentioned that a formal review of the annual AGM format is being considered by the Executive team in response to many participants dissatisfaction with the format (notwithstanding that Duluth well organised). Members mentioned that changing locations are often too far and take too much time away from business (for some + 5 days with travel) and thus, they are expensive. It was noted that many IMSI members did not attend due to these factors.

Michael Girard of NAMSC was informed of the process prior to the meeting and indicated that NAMSC is also looking at reorganising the meeting structure and open to review. The next 2 years are already committed. 2020 Wisconsin field tour Friday tech sessions, Sat with banquet. Agenda is fixed as it is on website now. 2021 NY open to options that do not leave them with negative budget as contracts are already signed.

Pres. Pam Green asked the Directors for a show of hands of those wanting to move forward with exploring meeting options for meetings and the AGM both with NAMSC and without them. The overwhelming majority raised their hands. Some proposals will be drawn up for the next board meeting.

2020 MEMBERSHIP RENEWAL - MEMBERSHIP FORM - MEMBERSHIP DRIVE

An online motion to apply the new fee structure was done the week of January 26th 2020. The motion carried with a 23 vote quorum, the other 5 eligible voters did not vote. The new membership form is on the IMSI website see link² and reflects the new membership fees. Mary Jeanne packer will proceed with invoicing the members.

Given the corrections/adjustments to the initial estimated fee structure, we estimate the income for 2020 will be about \$78,000 USD. Measures to increase IMSI income includes a membership drive coordinated by Jean soliciting the active collaboration of the current membership to recruit. The IMSI hopes to have your support to reach out to your maple business community

STANDARDS/CODEX COMMITTEE UPDATE

A Standards Committee was formed and have had one meeting so far. The Committee as formed by Christine Jean, CIE; Abby y van den Berg, UVM; Annie St-Onge, PPAQ; Helen Thomas, NYS Maple; Luc Lagacé, Centre Acer; Jean Lamontagne, IMSI; and special collaborator, John Goldberg, The Normandy Group.

At the board meeting, questions arose such as: Do we need to revoke application to FDA SOI from 2018? Do we need to see if any other country has maple syrup to be defined? This may make the process way too complicated. It was mentioned that once a standard is determined, Agriculture Canada could potentially lead discussion with other countries. There are producers in Russia. Other countries may just

² <http://www.internationalmaplesyrupinstitute.com/becoming-a-member.html>



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be exporters or their “maple syrup” may be fake. It was resolved that the definition should refer to the process as needing *heat*. Committee will continue working on the standard of identity.

IMSI WEBSITE & IMSI INFORMATION MANAGEMENT – FORMATION OF COMMITTEE TO STUDY & RECOMMEND

Jean Lamontagne mentioned that the IMSI website could use a review and evaluation regarding content and format, and possibly design. Suggested that a small task force could analyse and recommend changes. Ray Bonenberg volunteered to recruit and chair this committee.

Some ideas were noted: Need to know who IMSI website is targeting, what purpose it serves as this will drive content. The association and other collaborator websites are not linked, this could be interesting. Some consistency of message and positioning could be beneficial. Helen Thomas suggested we set up cloud drive storage for shared documents.

RESEARCH AND EDUCATION UPDATE – RESEARCHERS & EDUCATORS

Education - Mark Isselhart reported that an ACER project UVM extension – provide business planning documents for producer community and also forestry management³ and specifically tailored for maple producers. Currently surveying professional foresters for input. See MapleManager.org is documents for producers.

Abby van den Berg reported results of research on alternative defoamer in Maple Digest. Tapping early & tap hole viability study is in its 3rd year at Proctor. UVM are also starting project on red maple to evaluate yields and flavor. Proctor *YouTube* channel has ACER videos. North American Maple Producers manual out for edit/review and will be available June 2021. Abby looking for interest in French version let her know. Abby to send Simon manual. Mark Isselhart mentioned that 8 schools had maple competitions in Vermont. If IMSI members are interested, they have manuals that were used for the sessions. Please let Mark know. THE UVM also made Vermont Minutes, short infomercials, please see link below⁴. Adam Wilde mentioned that the winter maple schools well attended, also a fall online class. Ongoing research on 3/16 & 5/16 taps. Arnot center renovations are scheduled after the season. Important, there are sixteen available from 2020 as well as others from previous years here:

https://www.uvm.edu/extension/agriculture/maple_conference

Fred Ahrens mentioned that Ohio State University is doing study on production to replace NASS estimates who dropped smaller states in their survey. Fred mentioned that it is estimated that only 1/5 of actual production was reported by NASS. Overall, we have heard the comment that the NASS

³ <https://www.uvm.edu/extension/agriculture/maple/bizmodules>

⁴ <https://www.uvm.edu/extension/agriculture/vermont-maple-minute-0>



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numbers could understate production by 15 to 20 million pounds. OSU is also doing studies on red maple.

UPDATE OAO - JACQUES COUTURE

Jacques Couture updated the group on the American Origin Products Association⁵. The board approved supporting this organization with Jacques representing the IMSI at OAO. \$350 was budgeted for this membership.

AC NIELSON – SCAN DATA & U&A PROPOSAL

Cedric Belanger and Saad Khan of AC Nielsen explained the information and knowledge they impart to food manufacturing organizations. AC Nielsen collects grocery store sales data and produces reports that identify the size and growth of grocery segments and the skus that make up those segments. The group expressed interest in pursuing funding options further to enable study. The IMSI board will evaluate the proposal to obtain information about maple markets and consumers for its members.

MAPLE INDUSTRY ECONOMIC IMPACT STUDY

Mark Cannella, Mark Isselhart, Abby Van den berg and Jean met to follow-up on suggestion at Lake Placid meeting that our members could use a solid industry analysis, to understand the industry and to use to inform industry stakeholders, investors and politicians and guide policy decisions. It is possible that UVM and Mark Canella would be interested in participating in this project. More to come.

PPAQ PRESENTATION – IMPACT OF SERVING SIZE ON NUTRITIONAL PANEL NUTRIENTS LIST AND CLAIMS

Simon Trépanier presented US and Canadian labels with current and reduced serving size. The smaller serving size nutrition facts panel labels show that much of the important claims still qualify on a smaller serving size hence reducing the serving size to lower the calorie count could be a good option that does not preclude nutritional claims.

Simon shared an important observation: in 2002 the U.S. domestic production was 24% of the U.S. domestic market, hence much of the syrup sold in the United States was from Quebec. U.S. maple syrup production has grown since then and in 2019, the U.S. production of maple syrup was at least 50% of the domestic maple syrup consumption. The consequence is that in the past, the PPAQ actively promoted and advertised maple syrup in US markets because it was de facto promoting its own production. With the current ratio, promoting US syrup has a diminishing payoff. The point is that it would be economically sound and viable for the US industry to advertise and promote maple syrup, perhaps in a joint industry capacity through its associations and at an individual business level. *This is in some ways a tipping point and important for IMSI members to understand.*

⁵ <http://www.aop-us.org/>



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Jean Lamontagne commented that given the competitive U.S. market environment and fast changing food preferences and food innovation, it would be appropriate to understand the maple market such as market share, category size, competing categories and products (e.g., many new light syrups with lower calories) and the consumer better and, with that knowledge, advertise and promote maple syrup to U.S. consumers to grow the category and protect market share.

THE NORMANDY GROUP - PRESENTATION AND OPEN DISCUSSION

John Goldberg and Bailey Richterman of The Normandy Group, Washington, DC, presented regulatory trends, issues and FDA guidance & foreseeable regulatory issues facing industry. FDA and strategy to reduce dietary links to obesity heart disease & diabetes. A discussion on the expected dietary guidance and media attention to added sugars, Dr. Goldberg will participate in our group discussion about dietary & regulatory trends, exploring what actions & direction the industry members could take.

Baily presented some marketing slides among which most salient were the power of social media presence and campaigns and the fact that sugar and calories are the top two items consumers are checking the labels, an increasing trend in the last decade.

It was mentioned that in a survey, there is no real way to accurately gauge whether those surveyed were actually using real maple syrup as so many consumers do not know the difference. This assertion is somewhat misleading since the only way to know if consumers actually know what they are buying is to survey them specifically on this subject. ACNielsen data shows actual sales but does not distinguish product discernment and purchase motivation, it is a report on sales by category and by sku.

The discussion and the previous presentations led to an acknowledgment that a strategic prioritization of the information the industry needs is related to its perception of opportunities and threats in the market place and the desired market and retail actions it wants to take.

Instagram Influencers are out there and can be helpful. John suggests using some of the existing broader trend data of food and generational categories. For example, if consumer research indicates that lowering the calorie count on the label is important, then gathering data to influence the FDA would be a priority. Many mentioned that authenticity, carbon footprint and taste are important attributes that maple syrup possesses, especially resonant with millennials.

NEXT MEETING

May 8 Maple Museum in Crohgan, New York

Suggest ZOOM meeting Sept 15.

Board Meeting and AGM Oct. 20-24 Wisconsin

OLD/NEW BUSINESS

Participants were invited to speak up about any old or new business that requires discussion. No comments.



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MEETING ADJOURNED

At 1545, a motion to adjourn by Ray Bonenberg seconded by Mark Harran carried.