

Boiling it Down

by Winton Pitcoff

The Untapped Potential of America's Sugar Bushes

By all accounts, 2013 was a banner year for maple syrup production in the U.S. The 10 states surveyed by the National Agricultural Statistics Service produced 3,253,000 gallons, up 70 percent from 2012. Cooperative weather, more taps set, and the development and use of new technology in sap and syrup production all contributed to the increase.

But go a bit further back in the records—OK, a lot further back—and you'll find that in 1860, U.S. sugar makers reported production of 6,613,000 gallons. That's more than twice as much as 2013, and those producers were using buckets and wood-fired evaporators, and cooking much of their syrup down into granulated sugar for easier storage. U.S. production dropped steadily through 1970 and has been slowly climbing since then.

That decline isn't for a lack of resources. Using U.S. Department of Agriculture (USDA) data, Cornell researcher Michael Farrell estimates that the 10.5 million taps set last year barely scratch the surface of the total number

of taps available to U.S. sugar makers: an estimated 2.15 billion possible taps. Not all of those taps are easily accessible, of course, but in his new book, "The Sugarmaker's Companion," Farrell says that the current utilization rate of optimal sugar bush—which he describes as red and sugar maples on private land, within 0.5 mile of a road, at a density of at least 60 taps per acre—is approximately 2.5 percent. By comparison, he points out, the Canadian province of Quebec, responsible for producing as much as 80 percent of the world's supply of maple syrup, has a utilization rate of 36 percent. With nearly 190 million taps available in optimal sugar bushes in the U.S., Farrell suggests that there is a vast resource available to sugar makers.

It is that low utilization of available resources that limits U.S. production, rather than a lack of trees, says Farrell. His data show that of all the states, Vermont is making the best use of its trees, but sugar makers there are still only setting just under 3 percent of the number of taps they have available to them. None of the other top 10 maple-producing states make use of even

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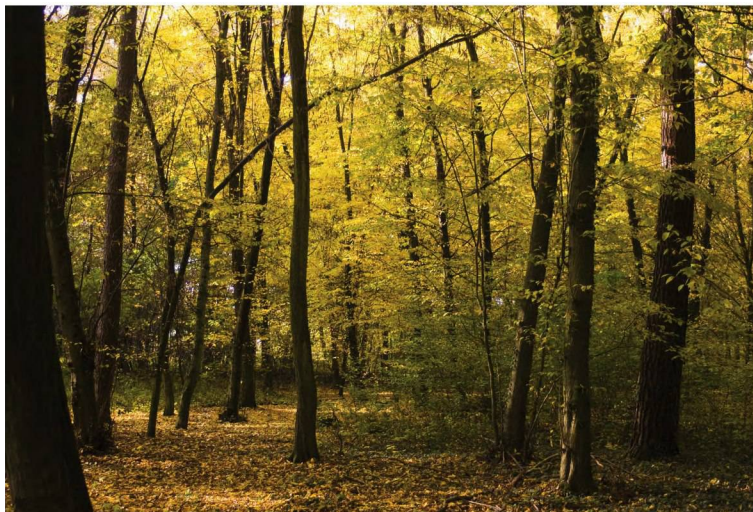


Photo by Gabby_S/pixabay.com.

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1 percent of their available taps. Farrell points out that if all states tapped at the same rate as Vermont—still just 3 percent of what they could—production would increase nearly sevenfold, turning \$81 million in annual sales into more than half a billion dollars.

Of course, increasing production by such a measure would require a similar shift in demand and consumption. Back in 1860, the nation's peak production year for maple syrup, per capita consumption of maple syrup was 27 ounces. Cane sugar was quite a bit more expensive back then, and corn-based sweeteners had yet to be developed.

With the advent of these less expensive sweeteners, per capita maple consumption decreased to less than 1 ounce by 1970, and has slowly risen to about 2.5 ounces today. Even at that relatively low level of demand, though, the U.S. still relies on Canada to supply as much as four-fifths of its maple syrup needs each year. With the growth of the local food movement and more farmers selling their products directly to consumers, U.S. production could certainly increase and find markets for additional production.

Here in the Northeast, it's easy to forget that we and our customers don't represent a typical American consumer when it comes to maple products. While sugar makers and most of our family and friends use maple syrup on almost a daily basis, Farrell cites a 1978 study that found that outside of the maple-producing

states, only 1.9 percent of households purchased pure maple syrup over the course of a year, while the rate was nearly six times that in the maple-producing states. That still means that more than 85 percent of consumers in our own region aren't seeking out pure maple products.

So while it's easy to get excited thinking about all of the trees waiting to be tapped and the potential for a significant increase in maple production, any effort to expand production needs to be coupled with education and marketing efforts to increase demand. This means touting the nutritive properties of maple syrup, promoting its use as more than just a breakfast topping, and developing value-added products that help introduce pure maple syrup to a broad audience.

The USDA estimates that Americans consume about 80 pounds of sweeteners each year, most in the form of refined sugars and corn syrups. Maple makes up less than 1 percent of that consumption, but the industry can capture more of the market if producers continue to position their products as healthier, less processed, local alternatives to other sweeteners. That growth in sales will provide sugar makers with incentive to invest in their operations and increase production, ultimately sustaining the U.S. maple industry. **F**

Winton Pitcoff is a freelance writer and coordinator of the Massachusetts Maple Producers Association.



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