

Indiana Department of Natural Resources
Division of Forestry

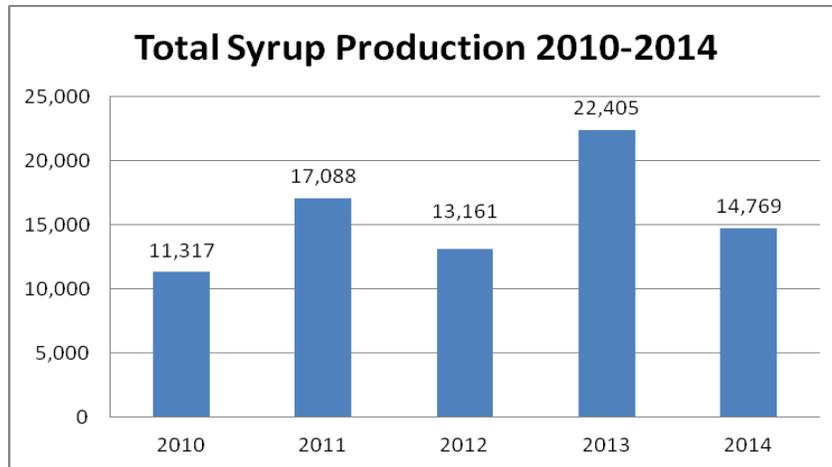
INDIANA'S 2014 MAPLE PRODUCTION

Shortly after the close of the 2014 Maple Syrup season, 135 questionnaires were sent to all known producers of maple syrup in Indiana. The number of questionnaires sent this year was slightly lower due to individuals from the '13 survey indicating they no longer produced syrup or simply wished not to participate. 74 individuals promptly responded to the questionnaire resulting in a 54% response rate, which was higher than the 45% response rate in 2013. I want to take this opportunity to say THANK YOU to the Indiana Maple Syrup Association (IMSA) for their assistance and partnership in completing the 2014 survey. For the past couple of years, IMSA has covered the postage costs in mailing out the surveys to producers. In today's world of shrinking budget, partnerships are essential to getting projects like this completed.

For the sake of comparison of similar climatic regions, the results were broken down per two major regions. The dividing line chosen was U.S. Route 40 bisecting the State into a Northern region and a Southern region. 14 questionnaires were returned from the south region and 59 came from the northern region.

Of the producers that responded to the questionnaire, almost 85% of these folks produced syrup in 2014, slightly higher than the 80% reported in 2013. 11 producers from the southern region and 49 producers from the northern region reported production in 2014.

Just over 75% of the states' total syrup production of 14,796 gallons was accounted for by 11 large producers. After a record year in 2013, this year's production was more in line with 2012's production of just over 13,000 gallons. This year's production was a little over 34% lower than the 22,405 gallons produced in 2013. Northern producers accounted for 12,429 gallons compared to while southern producers generated 2,367 gallons. The graph below reflects the total number of gallons produced each year from 2010.

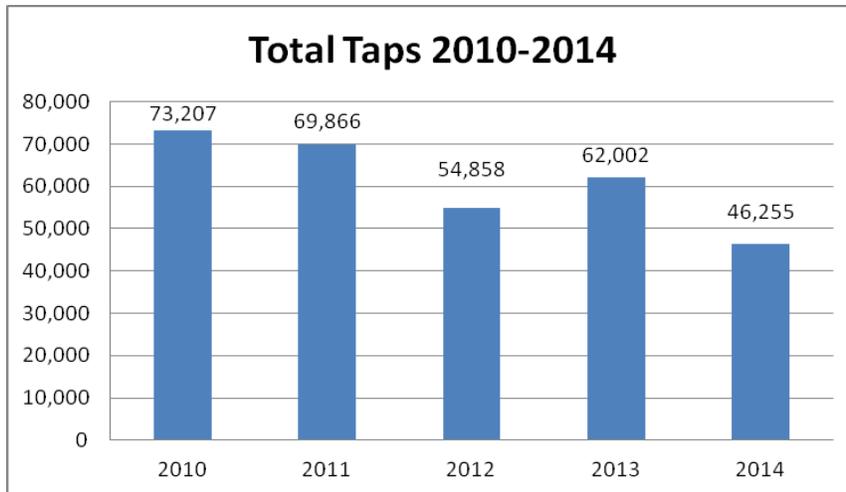


There are 45 counties in the state that have at least one active maple syrup producer. Elkhart County was once again the county with the most reported sugar camps – 24. Kosciusko County was once again the home to the largest sugar camp in the state with Putnam County coming in as having the second largest producer. Rounding out the top three was Elkhart County.

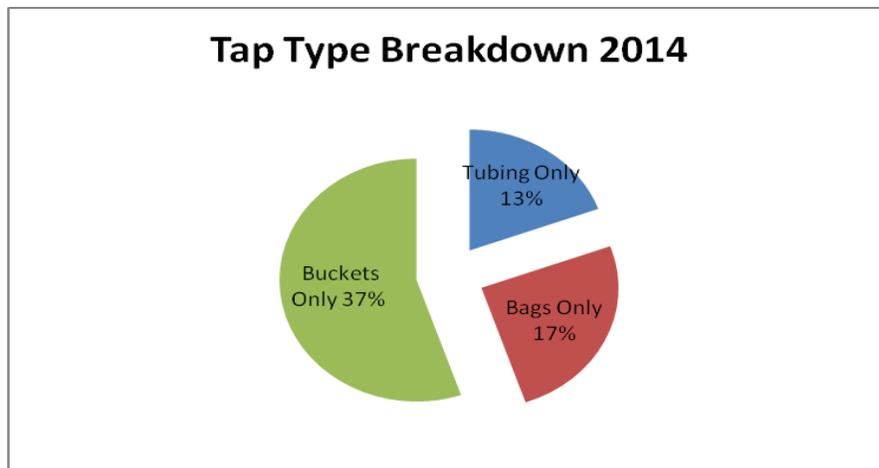
The overall state average for the opening date was 2/25/14 and the closing date was 3/29/14. Regionally, the average opening dates were 3/1/14 and 2/10/14 for the north and south respectively. The average closing date was 3/31/14 for the north and 3/22/13 for the south.

The average amount of sugar water (sap) needed to produce a gallon of syrup was 39 gallons in the north and 46 gallons in the south. The state average was 40.6 gallons of sap to produce a gallon of syrup. These numbers were slightly lower than those reported in 2013. Using these figures, we can estimate that approximately 527,394 gallons of sugar water was collected in 2014. The average amount of sap needed in 2014 to produce a gallon of syrup may not be wholly accurate, as some producers do not maintain accurate records of sap inflow. For those camps that did produce syrup in 2014 the average amount of syrup produced per camp was 239 gallons, significantly lower than the 350 gallons per camp reported in 2013 keeping in mind though, 2013 was a record breaking year. Although the majority all the sugar water was produced at the producer's own sugar bush(es); however in 2014 producers did purchase or produce for others over 116,783 gallons; considerably lower than the 453,000 gallons in 2013.

Of the 46,255 taps set in 2014 (a 28% decrease from 2013), about 23% of the state's syrup production was accounted for via producers using only buckets for sugar water collection. 17,407 buckets were used in 2014 for collection purposes. Statewide, the amount of sugar water collected solely by buckets accounted for total syrup production of 3,091 gallons. 38 Indiana maple syrup producers used an average of 458 buckets in their collection operations. The graph below represents the total number of taps used each year from 2010 to present.



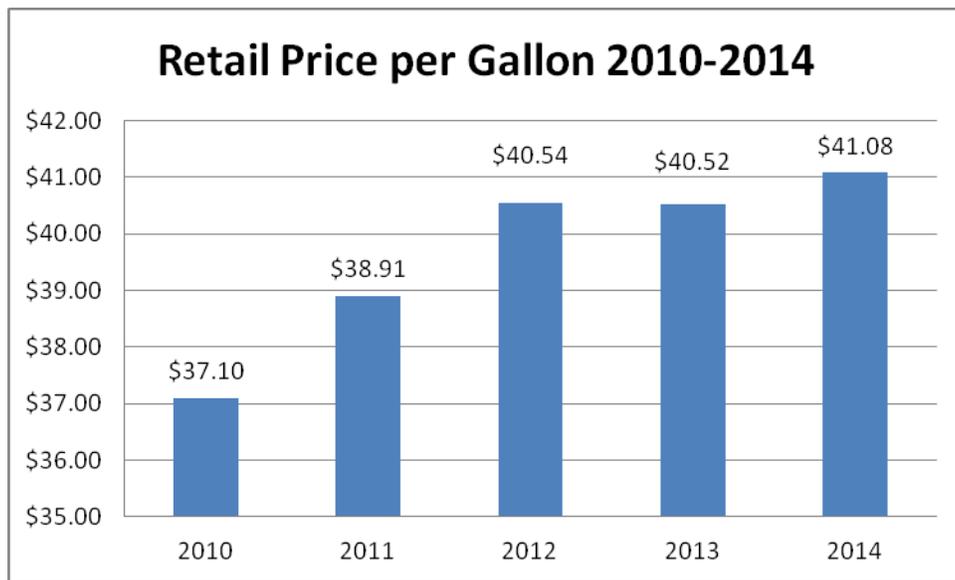
Buckets continue to remain the most popular way to collect syrup regardless of the region. The largest single producer utilizing buckets hung 3,800 buckets in the northern region and 164 buckets in the southern half. The pie chart below shows the number of producers per type of tap used in 2014.



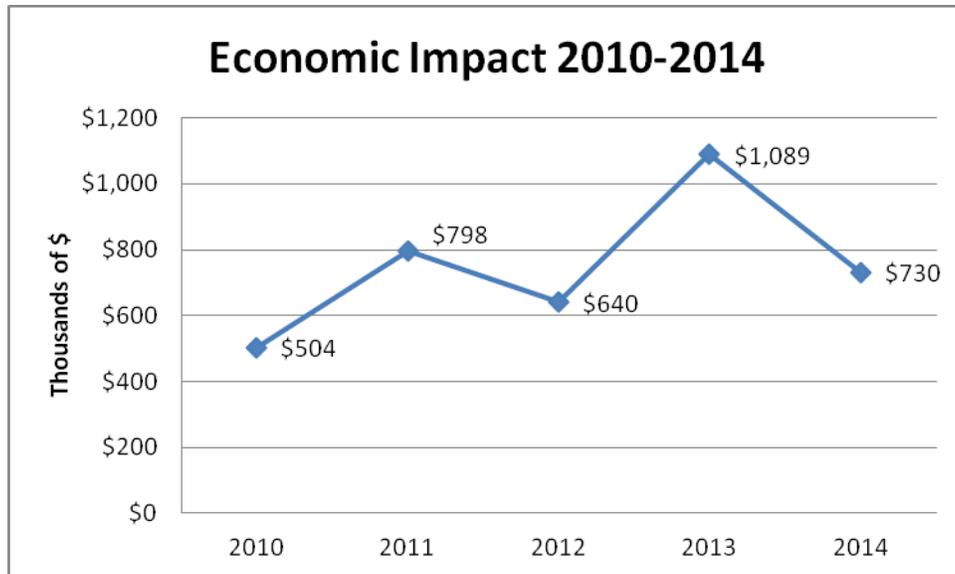
The use of plastic bags decreased only slightly from 16,407 in 2013 to 16,033 in 2014. 21 producers used plastic collection bags in 2014. Many of these producers also used buckets and or tubing as well. Producers using only bags to collect sap set on the average, approximately 550 taps. Those using only bags for sap collection accounted for 2,366 gallons in 2014. On a regional basis, those using plastic sap collection bags were split pretty evenly between the two regions. 10 northern producers using 1,215 bags collected 405 gallons of syrup. 3 producers in the southern region using only plastic bags collected 768 gallons and set 4,720 bags for collection.

A number of producers utilize tubing for sugar water collection and are slowly changing over as terrain, dollars and results allow. Statewide, 17 producers (14 from the northern region and 3 from the southern region) used over 295,000 feet (56 miles) of tubing for collection purposes in 2012. Those using tubing produced 7,950 gallons of syrup.

The statewide average price received for a retail gallon of syrup was \$41.08 which is slightly higher than the \$40.52 for 2013. The average price per retail gallon in the south was \$48.00 (it should be noted that only 1 survey from the south contained price data). Northern producers averaged \$40.80 per retail gallon. The average statewide price received for a quart of retail syrup was \$13.46. For the past couple of years more surveys were returned this year with information about pricing per pint. The state average per retail pint was \$8.10. Statewide wholesale average gallon price was \$37.40. The graph below depicts the average price per retail gallon of syrup since for the past 5 years.



The statistics gathered via our 2014 maple syrup production questionnaire most likely will not reflect the true income generated from Indiana's producers. The estimated statewide reported syrup income for 2014 (multiplying the average \$/per gallon X reported production) is \$607,820. However, if one appreciates that which was consumed via the producers' family, given away, or simply not reported, the calculated dollar figure may very well conservatively grow to over \$730,000. Assuming this figure to be realistic, the average dollar return per tap hole is \$15.78, almost \$2.00 lower than the \$17.56 reported in the 2013 maple syrup producer's survey. The graph below shows the estimated economic impact for maple syrup production during the past 5 years.



Sales do not appear to be a limiting factor for Indiana maple product producers; rather the inability to produce enough syrup due to the unfavorable weather and/or short tapping seasons were the greatest impediments to finding our maple fortunes. Prime tapping conditions center on below freezing temperatures of an evening with a fairly fast thaw in the mornings which normally allows for good syrup flow. 2014, according to those who commented on the season, only 15% of the producers reported this season was above average, while 51% as average, and 33% as below average. A short season an abnormally cold temperatures for long periods of time were the primary reasons for an average to below average season.

Overall, most of the produced syrup is sold at a retail level. Of those reporting production, 28% of those respondents state that at least a portion of their production is given away or consumed domestically; of course these same producers tend to be smaller in scope and production. Packaging preferences show the majority favoring retail sales in gallon containers, fewer favoring quarts, with remainders sold in smaller units. A few producers offer maple sugar, creams, candies, cookies, etc., but apparently these maple products do not account for substantial percentages of any one producer's sales.

We are all aware that each sugar bush has unique characteristics and that no two bushes produce alike. Although Indiana is a relatively small geographic area, the variation in weather is significant as evidenced by prior years. As reported earlier, conditions in 2014 were reported to be average to slightly below average.

45 respondents stated they would like to be listed in the Indiana Maple Syrup Producers Brochure. As time and funds permit, we are hoping to prepare an updated brochure. Additionally, we believe it would be beneficial to have "Indiana generic" maple syrup articles on hand for the barrage of requests from reporters for local newspapers and other media come next February, 2015.

I sincerely thank all the maple producers for their prompt questionnaire responses. I have updated our maple database and will continue to be a contact for Indiana maple products. ***Please remember the data compiled in this report is only as good as the data received. To be able to more accurately report maple syrup production figures, we'll continue to need a high response rate.*** Although our time is limited for personal visits to your operation, we do welcome your calls and inquiries on all facets of maple production. Special forest products such as maple syrup contribute substantially too many rural folk's income while offering wholesome therapy at the same time.