

Maple Syrup Production in Indiana for 2006

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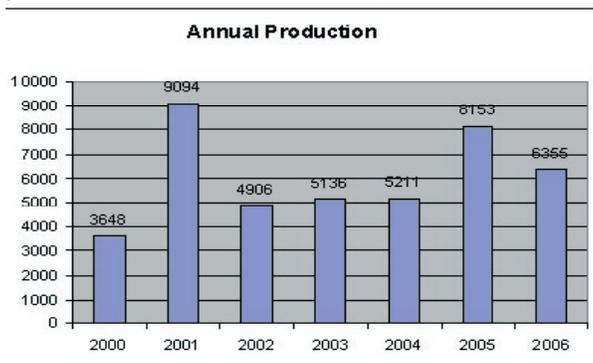
Shortly after the close of the 2006 Maple Syrup season, 168 questionnaires were sent to all known producers of maple syrup in Indiana. 75 individuals promptly responded to the questionnaire resulting in a 45% response rate compared to a 43% response rate in 2005.

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. 16 questionnaires were returned from the south region and 59 came from the northern region.

Of the producers that responded to the questionnaire, 70% of these folks produced syrup in 2006, a slight drop from the 74% reported in 2005. 8 producers from the southern region and 43 producers from the northern region reported production in 2006.

Almost 68% of the states' total syrup production of 6355.75 gallons was accounted for by twelve large producers. The total number of gallons produced was about 22% lower than the 8153 gallons produced in 2005. Northern producers accounted for 5663.5 gallons compared to 7206 gallons in 2005 while southern producers generated 292.25 gallons, significantly lower from 947 gallons reported in 2005.

The graph below reflects the total number of gallons produced each year from 2000.



There are 31 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 – 16. Elkhart County was also the home to the largest sugar camp, producing almost 900 gallons of syrup.

The overall state average for the opening date was 2/15/06 and the closing date was 3/14/06. Regionally, the average opening dates were 2/16/06 and 1/28/06 for the north and south respectively. The average closing dates were 3/10/06 for the north and 2/28/06 for the south.

The average amount of sugar water (sap) needed to produce a gallon of syrup was 44.4 gallons in the north and 51.2 gallons in the south. The state average was 45.3 gallons of sap to produce a gallon of syrup. The average amount of sap needed in 2006 to produce a gallon of syrup may not be wholly accurate, as quite a few producers do not maintain accurate records of sap inflow. The average amount of syrup produced per camp was slightly over 122 gallons, up from 100 gallons per camp reported in 2005. Most sugar water was produced at the producer's own sugar bush(es), although in 2006 producers purchased a little over 27,500 gallons of sugar water from outside producers, which was 8,500 gallons less than in 2005.

Slightly over 33,000 taps were utilized in 2006, an average of 626 taps per producer compared to 457 taps per producer in 2005.

Of those 33,162 taps, almost 64% of the state's syrup production was accounted for via producers using buckets for sugar water collection. Almost 12,200 buckets were used in 2006 for collection purposes. The amount of sugar water collected by buckets accounted for total syrup produc-

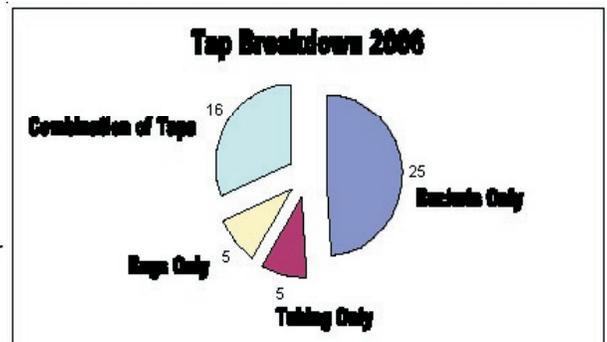
tion of 3922 gallons in the north and 175 gallons in the south region. 38 Indiana maple syrup producers used an average of 321 buckets in their collection operations.

The graph below represents the total number of taps used each year from 2000 to present.



Buckets remain more popular in the north region. The largest single producer utilizing buckets hung 1460 buckets in the northern region and 63 buckets in the southern half. Several producers reported using plastic bags and tubing in addition to buckets for the collection of sugar water.

The pie chart below shows the number of producers per type of tap used in 2006.



Although plastic sap collection bags have yet to really catch on, 14 producers used 1784 collection bags. Many of these producers also used buckets and or tubing as well. Producers using only bags to collect sap set on the average, approximately 197 taps. Exceptions are present though with two individuals using over 600 bags for collection. Those using only bags for sap collection accounted about for 167.5 gallons in 2006.

On a regional basis, those using only plastic sap collection bags were

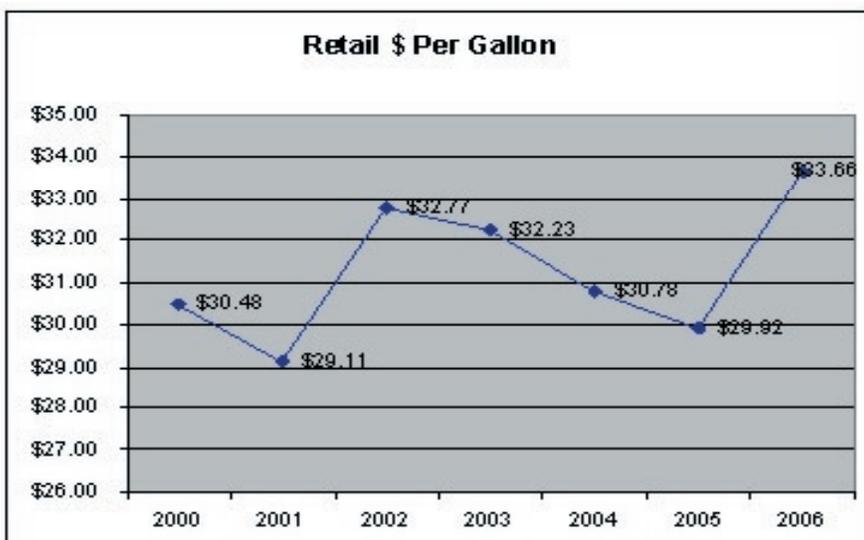
split pretty evenly between the two regions. Four northern producers using 900 bags collected produced 150.5 gallons of syrup. Only 1 producer in the southern region used only plastic bags (100 bags / 17 gallons) for syrup collection.

A number of producers are trying tubing for sugar water collection and are slowly changing over as terrain, dollars and results allow. Statewide, 17 persons (13 in the northern region and 4 in the south) used over 252,000 feet (almost 48 miles) of tubing for collection purposes in 2006. Those using only tubing produced 1657 gallons of syrup. This is below the 2005 figure of 2837 gallons. This amounts to 331 gallons per producer.

The statewide average price received for a retail gallon of syrup was \$33.66, over \$4 higher than in 2005. With only 2 producers from the south reporting, we did not feel comfortable to report an average price per gallon. Northern producers averaged \$33.48 per retail gallon.

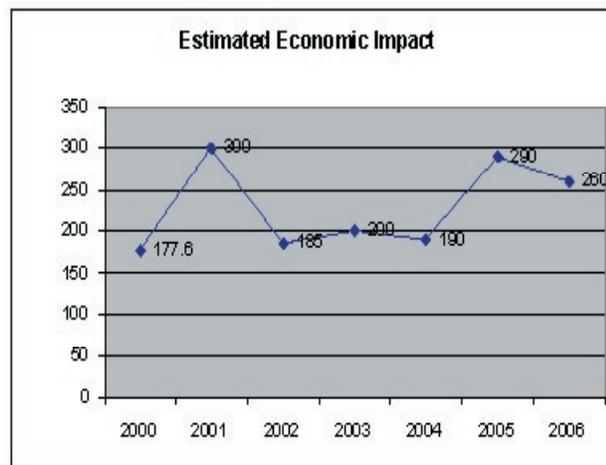
The average statewide price received for a quart of retail syrup was \$10.66. Considerably more surveys were returned this year with information about pricing per pint. The state average per retail pint was \$6.53. Statewide wholesale average gallon price was \$28.40; with little variation in wholesale gallon prices per region.

The graph below depicts the average price per retail gallon of syrup since the year 2000.



The statistics gathered via our 2006 maple syrup production questionnaire most likely will not reflect the true income generated from Indiana's producers. The statewide reported syrup income for 2006 (multiplying the average \$/per gallon X reported production) is almost \$214,000. 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 about \$260,000. Assuming this figure to be realistic, the average dollar return per tap hole is \$7.84, slightly lower than the \$8.07 reported in the 2005 maple syrup producer's survey.

The graph below shows the estimated economic impact for maple syrup production during the past 7 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. Unlike last year when 14% reported below average conditions, 2006 survey data reported only 16% as above average, 51% average, and 32% below average.

Overall, greater than 85% of the produced syrup is sold at a retail level. Of those reporting sales, over 34% of those respondents reporting production, 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 2006 were less favorable to a good tapping season compared to 2005 but the conditions reported for that year were about as close to perfect as could be.

36 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, 2007.

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 to many rural folk's income while offering wholesome therapy at the same time.