

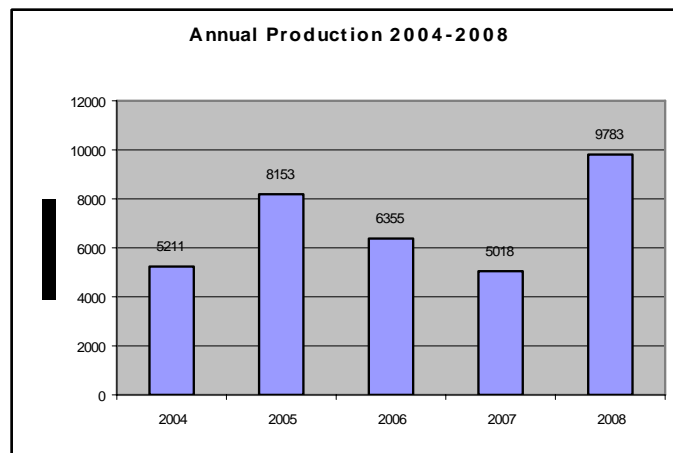
INDIANA'S 2008 MAPLE PRODUCTION (A Banner Year)

Shortly after the close of the 2008 Maple Syrup season, 156 questionnaires were sent to all known producers of maple syrup in Indiana. 62 individuals promptly responded to the questionnaire resulting in almost a 40% response rate, down slightly from the 42% response rate in 2007.

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. 13 questionnaires were returned from the south region and 49 came from the northern region.

Of the producers that responded to the questionnaire, a whopping 80% of these folks produced syrup in 2008, a significant increase from the 30% reported in 2007. 10 producers from the southern region and 40 producers from the northern region reported production in 2008.

Almost 75% of the states' total syrup production of 9783.75 gallons (**highest production since 2005**) was accounted for by 13 large producers. The total number of gallons produced was about 95% higher than the 5018.75 gallons produced in 2007. Northern producers accounted for 7576.75 gallons compared to 3964.75 gallons while southern producers generated 2207 gallons, significantly higher than 1054 gallons reported in 2007. The graph below reflects the total number of gallons produced each year from 2003.



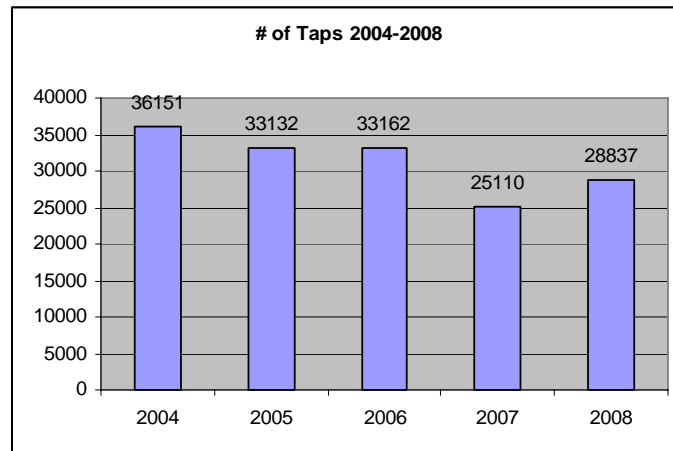
There are 29 counties in the state that have at least one active maple syrup producer.

Elkhart County was once again the county with the most reported sugar camps – 15. Elkhart County was once again, the home to the largest sugar camp, producing almost 1100 gallons of syrup.

The overall state average for the opening date was 2/19/08 and the closing date was 3/23/08. Regionally, the average opening dates were 2/24/08 and 1/30/08 for the north and south respectfully. The average closing dates were 3/25/08 for the north and 3/12/08 for the south.

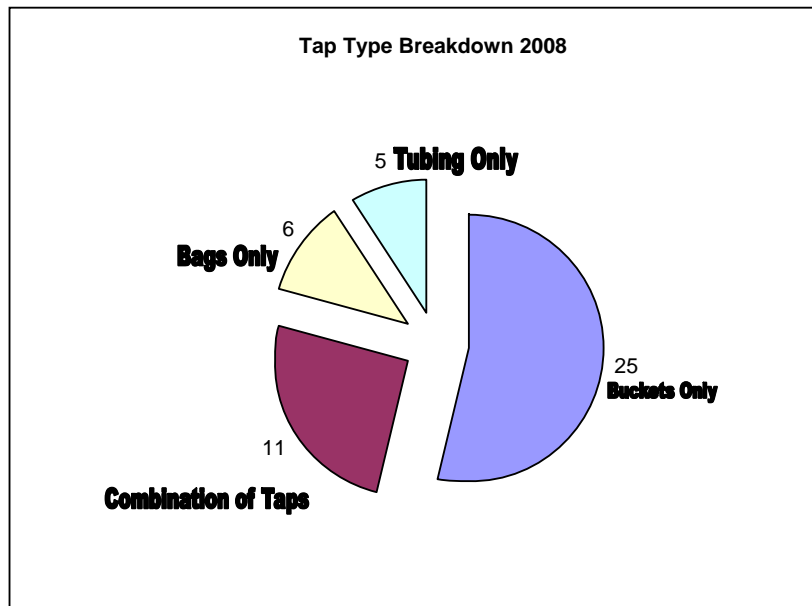
The average amount of sugar water (sap) needed to produce a gallon of syrup was 40.4 gallons in the north and 46.5 gallons in the south. The state average was 41.7 gallons of sap to produce a gallon of syrup. Using these figures, we can estimate that almost 40,800 gallons of sap was collected in 2008. The average amount of sap needed in 2008 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 195 gallons, up significantly from 100 gallons per camp reported in 2007. Almost all the sugar water was produced at the producer's own sugar bush(es); however in 2008 producers did purchase around 44,000 gallons of sugar water from outside producers.

Of the 28,837 taps, almost 52% of the state's syrup production was accounted for via producers using only buckets for sugar water collection. 12,249 buckets were used in 2008 for collection purposes. The amount of sugar water collected solely by buckets accounted for total syrup production of 5007 gallons in the north and 37.5 gallons in the south region. 56 Indiana maple syrup producers used an average of 340 buckets in their collection operations. The graph below represents the total number of taps used each year from 2004 to present.



Buckets continue to remain the most popular way to collect syrup regardless of the region. The largest single producer utilizing buckets hung 1440 buckets in the northern region and 300 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 2008.

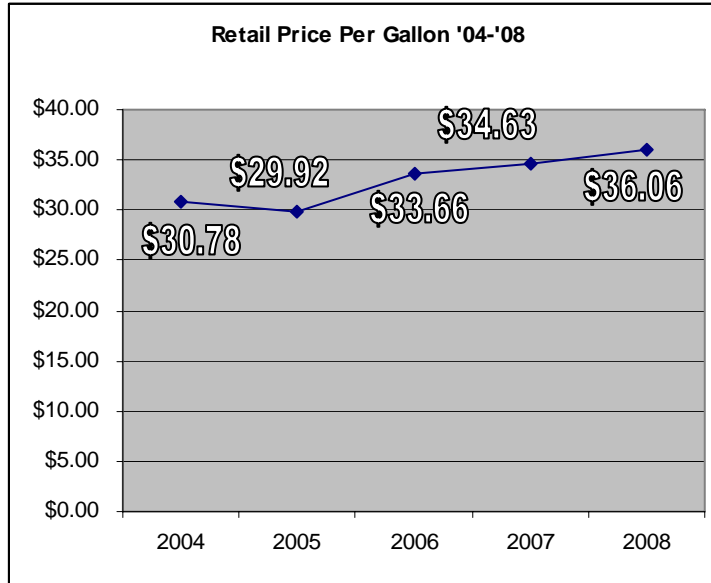


Although plastic sap collection bags have yet to really catch on, 11 producers used 529 collection bags. Many of these producers also used buckets and or tubing as well. Producers using only bags to collect sap set on the average, approximately 66 taps. Those using only bags for sap collection accounted about for 207 gallons in 2008. On a regional basis, those using plastic sap collection bags were split pretty evenly between the two regions. Seven northern producers using 323 bags collected 267 gallons of syrup. Three producers in the southern region using only plastic bags collected 42 gallons and set 206 bags for collection.

A number of producers are trying tubing for sugar water collection and are slowly changing over as terrain, dollars and results allow. Statewide, 12 persons (8 in the northern region and 4 in the south) used over 217,000 feet (over 41 miles) of tubing for collection purposes in 2008. Those using only tubing produced 2791 gallons of syrup. This was an increase from the 2007 figure of 1927 gallons. This amounts to 558 gallons per producer.

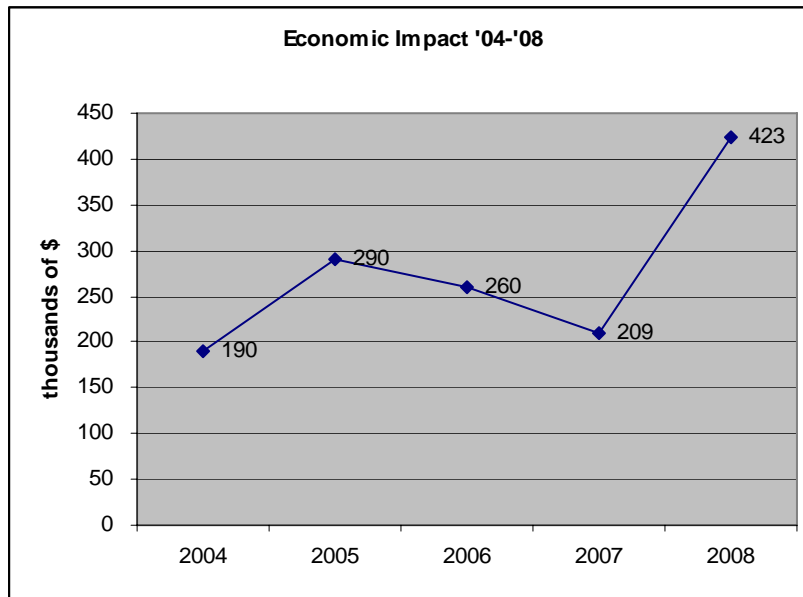
The statewide average price received for a retail gallon of syrup was \$36.06 which is a dollar and a half higher than the price reported for 2007. The average price per retail gallon in the south was \$34.88. Northern producers averaged \$35.60 per retail gallon. The average statewide price received for a quart of retail syrup was \$11.80. 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 \$6.77. Statewide wholesale average gallon

price was \$32.16. The graph below depicts the average price per retail gallon of syrup since the year 2004.



The statistics gathered via our 2008 maple syrup production questionnaire most likely will not reflect the true income generated from Indiana's producers. The statewide reported syrup income for 2008 (multiplying the average \$/per gallon X reported production) is almost \$353,000.00. 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 almost \$423,000.00. Assuming this

figure to be realistic, the average dollar return per tap hole is \$14.66, considerably higher than the \$8.32 reported in the 2007 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. 2008, according to those who commented on the season was an exceptionally good year with 62% of the producers reported this season was above average, 32% as average, and only 6% as below average.

Overall, most of the produced syrup is sold at a retail level. Of those reporting sales, 30% 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 2007 were average for a good tapping season. 2008 appears to be one of the best years in both weather and production of syrup.

31 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, 2009.

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.