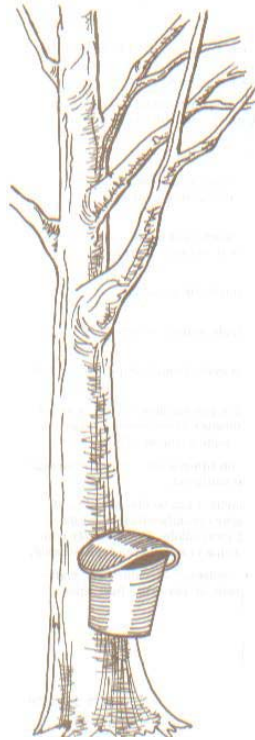


Survey of NYS Landowners

Report to the Steering Committee of the Lewis County Maple Syrup Bottling Facility



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Appendix 1: Brochure sent to 7000 landowners for Northern NY

Agricultural Development Program applied research/extension project

Appendix 2: [Survey of NYS Landowners](#)

Click on the title above to open the survey document- from this document click on an individual question to view detailed analyses based on three levels of stratification: (1) number of taps (2) Regional NYSMPA Association (3) membership status in NYSMPA.

Acknowledgements

There are many people who assisted with this survey that we would like to recognize. First and foremost we would like to thank the hundreds of landowners who took the time to fill out the questionnaire. Roughly 900 producers spent an estimated 500 hours providing valuable and meaningful responses to our survey questions. Without their thoughtful input, this report would not be possible.

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Introduction

In the Spring of 2008, Lewis County's Office of Economic Development and Cornell Cooperative Extension of Lewis County began initial discussions regarding the feasibility of locating a large scale maple syrup bottling, warehouse, and distribution facility in Lewis County. Lewis County is the largest producer of maple syrup in NY and anecdotal reports indicate that much of the syrup is sold in large drums to out of state buyers. Rather than continuing to ship bulk syrup out of state for the value to be added elsewhere, it was decided to explore the possibility of constructing a large scale bottling facility in the county. These large scale facilities need sufficient economies of scale to compete in the marketplace, so a minimum amount of syrup is needed to consider moving forward on the project. Lewis County officials contracted with Cornell University to conduct a survey of NYS maple producers and landowners in order to determine the current and long term supply of bulk syrup that could be used to supply a new bottling facility.

An earlier report on the maple producer survey has already been published on the Cornell website www.cornellmaple.com. This report concluded that there was not enough bulk syrup currently available in NYS to merit construction of a new bottling facility. However, given the vast potential of NYS to increase its utilization of maple trees and co

For organizational, environmental, and economic reasons, all of the data are being made available as linked documents on the web rather than printed in this report. The data are presented according to individual questions and variables and can be accessed by clicking on the relevant question(s). Where appropriate, the data are stratified according to the size of the landowner, location based on one of the seven NYSMPA regions, and whether or not the respondent is a member of NYFOA. Readers can view detailed analysis for each question and variable by clicking on the appropriate question on the survey. This will save a great deal of paper and allow readers to easily find the data they are looking for.

Survey Methodology

Richard Stedman and Michael Farrell served as co- Principal Investigators on the project while the Human Dimensions Research Unit at Cornell handled survey administration. The survey was developed over a two month time frame that allowed for significant stakeholder input into the design and scope of questions asked. All members of the steering committee, the Board of Directors of the NY Forest Owners Association, and several faculty and staff members at Cornell received a draft of the survey to provide comments. The feedback was helpful in fine-tuning the questions to make sure they were understandable and ensuring that the survey was comprehensive in covering all of the aspects relevant to this project.

In order to conduct a survey of 1,600 maple producers, we utilized two databases:

- (1) current members of the New York Forest Owners Association (NYFOA)
- (2) tax map parcels for all NY landowners greater than 15 acres

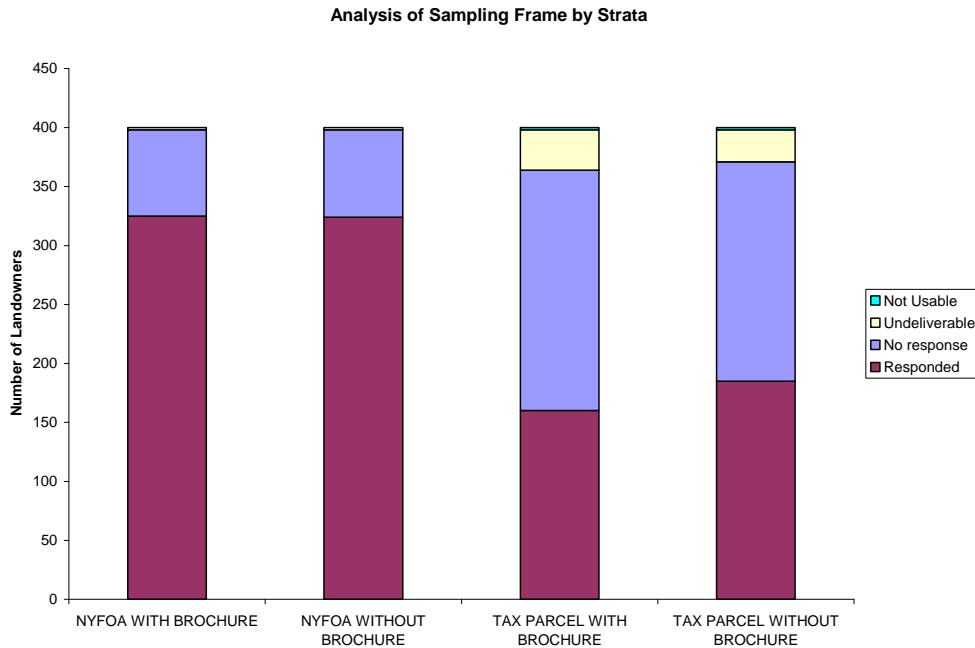
The lists were screened to eliminate duplicates and delete any addresses that appeared to be invalid. We also sent half of the landowners a brochure entitled “Getting Involved with Maple Production: Options for Landowners in New York State”. This was done to test the effect on whether or not providing an informational brochure about maple production would have an influence on the responses. Mailing this brochure did not seem to produce any measurable differences in responses. Therefore, the interpretation of the results will not address this issue.

The first surveys were mailed on March 20 and a reminder letter was sent on March 27. Those producers who did not respond within 2 weeks were mailed a second copy of the survey on April 10 while a final reminder letter was mailed on April 17 to people who still had not responded. Data entry began in early May and continued until mid-June when the last completed surveys arrived.

Sampling Frame Analysis

Of the 1,600 questionnaires that were mailed, we received 994 completed questionnaires while 65 were undeliverable, resulting in a total adjusted response rate of 64.2%. Figure 1 below presents the results of the sampling frame according to the four stratifications: NYFOA member with brochure, NYFOA member without brochure, Tax Map Parcel with brochure, Tax Map Parcel without brochure.

Figure 1. Analysis of the sampling frame results according to four strata.



The mailing to NYFOA resulted in a much higher response rate than the tax parcel database, at 81.5% vs. 46.9%. We had expected the NYFOA members to yield a higher response rate since they are more engaged in their forestland, but were pleasantly surprised to produce one of the highest response rate ever recorded in Cornell’s Human Dimensions Research Unit’s history. There was also no significant difference in the response rate of those landowners that received a brochure vs. those that did not. In fact, among the tax parcel database, landowners who did not receive a brochure even yielded a higher response rate than those that did, at 49.9% vs. 44%, respectively. This clearly shows that including the brochure had little to no impact on landowners desire to respond

to the survey, and further analysis also indicates that had no significant impact on landowners responses to the questions.

Our survey also wound up going to many landowners who did not own at least 15 acres of woodland, our minimum cutoff to participate in the survey. Of the 994 useable responses, 893 stated that they owned at least 15 acres of woodland. The vast majority (86%) of those responding that they did not own at least 15 acres came from the tax parcel dataset, as our survey mechanism included many people who own at least 15 acres of land, but not 15 acres of woodland. The descriptive statistics of the total acreage, wooded land, and acres of potential sugarbush (as identified by the landowner) are presented below in Table 1.

Table 1. Acreage of respondents that stated to own at least 15 acres of woodland.

	Mean	Std Deviation	Minimum	Maximum	Median
Total acreage owned	267	1,038	22	28,000	120
Acres of wooded land	184	988	15	27,000	80
Acres of potential sugarbush	54	233	0	5,000	15

Landowner Attitudes & Practices Regarding Syrup Production

In order to be able to increase the supply of maple syrup produced in NYS, there must be a strong surge of landowners getting involved with the industry. Given that the vast majority of landowners are not currently tapping themselves or having others tap their trees, we wanted to know whether they felt they should be tapped. Therefore, we asked several questions to gather information on landowners attitudes towards managing their property in general and tapping in particular.

The first set of questions asked landowners if they felt their land should be managed and whether they feel that they (or others) manage their land. We defined management directly in the question as follows: *By "manage" we mean take deliberate actions to influence the value of the land. Some examples of management activities are harvesting firewood, marking a trail, tapping maple trees, or improving habitat for wildlife.*

Table 2. Attitudes of landowners towards management of their land. Results are presented as the total number of landowners on the top with percentages on the bottom.

	Yes	No	Not Sure
Do you feel that your wooded property should be managed in some way by you or others?	763 (85.9%)	72 (8.1%)	53 (6.0%)
Do you feel that you manage (or have others manage) your wooded property?	673 (76.0%)	148 (16.7%)	65 (7.3%)

The data clearly indicate that most landowners feel that their property should be managed and slightly less are actually following through with management. Previous studies (Connelly & Smallidge 2007) have determined that time, not having the right equipment, and high costs were the main reasons why landowners have not been managing their land. Although these factors would also prohibit landowners from becoming engaged in maple syrup production directly, it would not prohibit landowners from leasing their forestland to a nearby maple producer.

We asked landowners if they produced maple syrup, and if so how many taps they put out each year, with the results displayed below in Table 3.

Table 3. Number and percentage of landowners who produce maple syrup.

Database	# (and %) Maple Producers	Mean # of Taps	Standard Deviation	Min # of Taps	Max # of Taps	Median # of Taps
NYFOA	68 (11.1%)	687	2,567	3	18,000	100
Tax Parcel	15 (5.9%)	182	419	8	1,600	40

It is also worth noting that when choosing the NYFOA database, I attempted to delete all known maple producers since they were already included in the producer survey. If the NYFOA sample had been truly a random sample of all members of the association (without a bias against known producers), the % of members that produce syrup would actually be much higher. It is not terribly surprising to have such a large percentage of

NYFOA members engaged in syrup production. Members of NYFOA are likely have a greater interest in and are more engaged in their forestland than non-members, so one would expect more of these people to be making syrup on their land.

It is encouraging that nearly 6% of landowners from the general population reported to be producing syrup. However, given the nature of the database and the inability to conduct non-response interviews via phone, we can not state with any sort of certainty that % of all landowners in NY are currently producing syrup on their land. It is likely than a much smaller percentage of landowners who did not respond to the survey are actually making syrup. The majority of people who reported to make syrup are also hobby producers, as the median # of taps for NYFOA was 100 and that from the general tax parcel database was 40. These hobbyists are some of the best candidates to become large scale commercial producers, as they are already familiar with the process and obviously enjoy the work. However, producing syrup on a commercial scale >1,000 taps is much different than a small backyard operation of 40 taps. Most large scale producers started out small, liked what they were doing and wanted to expand, so the opportunity and challenge for NY to increase its overall maple production will depend partly on the long-term objectives of these hobbyists.

In order to determine the attitudes of landowners who are not currently producing syrup, we asked the following question (15): Do you feel that the maple trees on your property should be tapped for syrup production, either by yourself or someone else?, with the results as follows

Table 4. Landowner attitudes towards whether they feel their trees should be tapped.

Database	Yes, By Myself	Yes, By Someone Else	No	Not Sure
NYFOA	43 (8.4%)	59 (11.5%)	209 (40.6%)	204 (39.6%)
Tax Parcel	10 (4.6%)	20 (9.3%)	83 (38.4%)	103 (47.7%)
All Respondents	53 (7.2%)	79 (10.8%)	292 (40.0%)	307 (42.0%)

This represents an enormous opportunity to have more landowners involved with maple production. Whereas ~40% of landowners will probably never get involved with maple production, there is a good chance that 14% would (if given the right opportunity) and an opportunity for 47% to be persuaded in either direction. Turning the desires of at least 14% of landowners to have their trees tapped will require overcoming the barriers and making sure they are fully aware of the incentives for getting involved with maple production.

Why Landowners Have Not Yet Tapped Their Trees

Given that 18% of landowners feel that their trees should be tapped, yet a much smaller percentage actually produces syrup, we asked landowners what the primary reasons were why they haven't utilized their maples for syrup production. The results are stratified according to whether they think their maples should be tapped, with the results displayed below in Table 5.

Table 5. Reasons why landowners are not tapping their own trees for syrup production.

Possible Reasons for Not Tapping.	Do you feel that the maples on your property should be tapped?			
	Yes, By Myself	Yes, By Someone Else	No	Not Sure
I have never thought about it as an option	13	38	16	47
I have no interest in collecting/boiling sap into syrup	2	20	35	45
I do not have enough tappable maple trees	15	14	49	29
I don't know how to get started	21	23	2	20
I don't know where to purchase supplies	19	8	2	8
My trees are not easily accessible	19	16	24	21
I do not have enough time	53	57	28	44
I don't have access to family, friends or neighbors who could help me	23	18	8	21
The initial cost of buying equipment is too high	28	16	9	17
Syrup production is not profitable enough	17	6	9	10
I don't live close enough to my forestland	13	16	18	24
Tapping would interfere with other forest uses	2	4	25	6
It is too difficult to get financing to purchase supplies	11	1	0	1
I'm concerned about reducing sawtimber value	15	8	34	25
I think the tubing used to collect sap would look bad	9	4	4	4
I'm concerned that tubing would interfere with recreation and trails	8	13	9	11

By far the greatest majority of respondents indicated that time was the limiting factor, with 53% of those who would like to tap trees themselves and 57% of those who would like someone else to tap their trees choosing this option. This result was expected, as people don't have time to do all of the things they would like to do. However, people make the time for activities that are a priority, so stating that one does not have enough time is a relative statement. Also, it doesn't take any time to let someone else do the work, so leasing is a good opportunity for landowners who think their trees should be tapped, but don't have the time to do the work themselves.

There are also many people who stated that they have never thought about it as an option, as this was the top response among those who were not sure if they wanted their trees tapped at 47% and the second highest response among those who would like someone else to tap their trees at 38%. The direct mailing and workshops funded through NNYADP this autumn are one method of trying to reach landowners who have never considered maple production as an option for their property. If we wish to increase the number of trees being tapped, it is imperative to continue aggressive outreach campaigns to landowners throughout the state.

The second highest response among those who would like to tap their trees themselves was that the initial cost of buying equipment is too high (28%). These landowners are perfect candidates for working with a nearby producer to have them boil their sap. The cost per tap of setting up a tubing system is much lower than that of building a sugarhouse and buying an evaporator, reverse osmosis, filter press, and all of the other equipment items necessary for producing high quality syrup in a cost-efficient manner. Another no-cost option is to "purchase" the tubing materials with the syrup that will be produced. Many large producers buy in sap from neighboring landowners and provide them with the tubing materials in exchange for syrup the following sugaring season. This can be an attractive option for landowners who would like to tap their trees but are not willing to make any financial investments.

Among the respondents who stated that they do not think their trees should be tapped, the greatest reason given (49%) was simply that they do not have enough tappable maple trees. Certainly not all landowners are fortunate to own a potential sugarbush, so it was expected that our mail survey would reach landowners that do not own a significant number of maple trees. The next highest responses were that they do not have any interest in tapping (35%) and that they are concerned about reducing sawtimber value (34%).

The question of degrading sawtimber value deserves much more research and time than will be presented in this paper. We are in the process of conducting research to determine the long-term economics of tapping vs. timber production. Previous research (cite Quebec studies) has indicated that the overall value of tapping is greater than that of managing for sawtimber. This is especially true if a landowner is going to utilize the butt logs for taphole maple lumber, which can fetch high prices in the right niche markets. However, there are many variables that need to be addressed, and future efforts will result in a spreadsheet that landowners can utilize to evaluate whether it makes economic sense to manage their forestland primarily for syrup or sawtimber production.

Among the respondents who were not sure if their trees should be tapped, the top three responses were that they had never thought about it (47%), have no interest in the process (45%), and not enough time (44%). The prevalence of these responses indicates that they would be great candidates for leasing to an existing producer. Since leasing is a very passive activity that does not require any interest or effort of the landowner, these obstacles can easily be overcome through active outreach to the landowners.

Requirements to get landowners involved with maple production

We asked landowners how likely they would be to start utilizing their maples for syrup production based on a number of possible scenarios. The answers are summarized in table 6 on the following page.

Table 6. Likelihood of landowners to get involved with maple production based on different scenarios. Results are presented as the percentage of landowners checking each of the following likelihood options: very unlikely, somewhat unlikely, somewhat likely, very likely.

	Very Unlikely	Somewhat Unlikely	Somewhat Likely	Very Likely
Syrup production was more profitable	45	19	29	7
There was more education and training opportunities for learning how to do it	48	22	23	7
You had more trees available for tapping	34	21	35	10
You lived closer to your forested property	49	20	23	8
You were able to qualify for agricultural assessment (reduced property taxes) by using your land for syrup production	29	15	33	24
Easy financing was available for purchasing equipment	48	22	23	8
You had more people available to assist	37	20	30	13

The results of this question clearly indicate the importance of agricultural assessment in enticing landowners to utilize their maples for syrup production. Approximately 1/4 of landowners indicated that they would be very likely and 1/3 somewhat likely to get involved with maple production if it would allow them to qualify for a reduced tax assessment as a result. Agricultural assessment for maple production is one of the best kept secrets in the NY maple industry. In fact, a recent survey of NY maple producers indicated that only half of the producers that could qualify for ag assessment actually enlist in this program. Reaching out to landowners about the benefits of ag assessment and how one can qualify via maple production is one of the most cost effective and efficient ways to increase the level of maple production in NY.

After ag assessment, the next greatest enticement would be if landowners had had more maples available for tapping (35% somewhat likely and 10% very likely). These results make intuitive sense, as there are likely many landowners who would want to be maple producers, but just don't have enough maple trees on their own land. The challenge and opportunity with these landowners is to encourage them to work with nearby landowners who do have an abundance of trees available for tapping. There are many maple producers who own their own sugarhouse but tap exclusively on others property. Although this is not as preferable as being able to tap on one's own property, it can certainly be done, especially when considering the ability to qualify for ag assessment through leasing agreements.

Another pervasive problem throughout the agricultural sector is the shortage of labor. This is especially true in the maple industry, as the work is very seasonal and primarily takes place in the winter/early spring under uncomfortable conditions. In fact, the third greatest incentive landowners indicated to make them more likely to get involved in maple production is if they was more people available to assist (30% somewhat likely and 13% very likely).

Although the other scenarios did not yield as great a response as agricultural assessment, the results are still impressive and indicate that more extension and outreach would be useful. In fact, 23% of landowners would be somewhat likely and 7% very likely to get involved with maple production if there was more education and training opportunities available. The Cornell Maple Program does offer an extensive educational program to existing and beginning maple producers, so the opportunity and challenge is to reach out to landowners, make them aware of the resources that exist, and encourage them to get involved.

Prices for syrup also have a significant influence on the level of syrup production. In fact, 29% of landowners would be somewhat likely and 7% very likely to get involved with maple production if it was more profitable. Syrup production can be a profitable venture,

especially if it is done right. Syrup prices rose to record high levels over the past couple of years as a result of a supply shortage. This has spurred a lot of expansion in the industry, both among existing and new producers. However, prices will eventually fall if production starts to outpace demand, which is likely to happen in the next couple of years. A new check valve spout adapter developed by researchers at the University of Vermont and produced by Leader Evaporator Company has the potential to revolutionize the industry by drastically increasing yields per tap. In order for prices to remain high, the maple industry must continue its promotion efforts both domestically and abroad.

Maple Producer Outreach to Landowners

We asked landowners whether or not they have been approached by a maple producer asking permission to tap on their property. We stratified the responses according to acreage, as large landowners were much more likely to be approached by a producer than smaller landowners. As seen below in Figure x, this trend is not surprising, given the fact that producers would rather be working in a large sugarbush with thousands of potential taps than several scattered smaller sugarbushes. Larger landowners are also more likely to have a sugarbush of any size on their property, so one would expect larger landowners to have been approached more often.

One of the most promising results of this survey is that landowners that have been asked permission to have their trees tapped are more likely than not to say yes. Of those respondents that own 250 or more acres, 13% have been approached by a maple producer- 8% granted permission while 5% denied access to their trees. This trend continues among the other respondents, although smaller landowners were much less likely to have been approached by a producer. In fact, only 2.66% of landowners with less than 100 acres had been approached and 1.66% accepted the request.

Table 7. Percent of landowners that have been approached by a landowner asking permission to tap their trees.

Have you ever been approached by a landowner asking permission to tap?

Acreage	No	Yes, I accepted	Yes, I declined
< 100	293 (97.3%)	5 (1.7%)	3 (1%)
100-249	265 (90.4%)	15 (5.1%)	13 (4.4%)
≥ 250	155 (87%)	14 (7.9%)	9 (5%)
All respondents	715 (92.4%)	34 (4.4%)	25 (3.2%)

These results are very promising for the potential to increase collaboration between maple producers and landowners. Those wishing to grow their businesses should follow the wisdom of “ask and ye shall receive”. If producers were more vigilant and aggressive in their outreach efforts, there are plenty of landowners willing to lease and sugarbushes available to tap.

Landowner Activity with Leasing

Only 20 of the respondents indicated that they lease or have leased their forestland to a maple producer. Of these, only 3 stated that they had a written contract for the arrangement. In order to qualify for agricultural assessment, the landowner must have a written 5 year contract with the producer. Therefore, one can conclude that many landowners who are currently leasing their forestland to a producer are not receiving agricultural assessment as a result.

We also asked whether the landowners were satisfied they are with their leasing arrangement and received 17 responses. Of these, 4 were dissatisfied whereas 13 were satisfied. There were not enough responses to yield statistically significant results. Anecdotally, there are many reasons why landowners become dissatisfied with leasing arrangements, including the following:

- 1) certain maple producers not taking care of the woods and leaving trash scattered about
- 2) personality conflicts between producers and landowners

3) financial conflicts when a landowner is offered much more money from a logger to cut the trees than the maple producer is paying in lease fees

It is up to individual maple producers to ensure that the landowners they are working with remain content. While there is little that can be done about inherent personality conflicts, producers should always treat leased land as if it were their own and avoid leaving any trash or residue in the woods. If a sap collection point is located near a landowners' residence, it is important to respect the privacy of the landowner and try avoiding picking up sap late at night or very early in the morning. Finally, from a financial perspective, producers should compensate landowners to the greatest extent possible, whether this be financial or with syrup. Often times receiving syrup that came from their own property is a much better reward than direct cash. Producers should also become aware of agricultural assessment and share these details with landowners they are working with. Although landowners may be able to make more money immediately by logging, when considering the savings on taxes by leasing to a sugarmaker, often times the lease agreement will be more profitable in the long term.

Reasons landowners have not leased

We have already reported on the reasons why landowners have not tapped their maple trees themselves, however it is also worth noting why they have not leased their land to a producer. Whereas tapping and making syrup oneself requires a lot of time and expertise, leasing your land to someone else to do the work requires hardly any effort. We provided the landowners with a list of seven possible reasons why they have not leased and asked them to check off the ones that applied to them. The results are displayed in table 8 below.

Table 8. Percentage of respondents indicating the reasons they have not leased their forestland.

I have never been approached by a maple producer about tapping my trees	69
I do not have enough maple trees on my property to make it worthwhile	39
I am concerned about reducing sawtimber value	25
The revenues gained from leasing are not worth the trouble	22
I am concerned that tapping would harm or kill my trees	10
I am concerned that the tubing would interfere with recreation and trails	9
I think the tubing used to collect sap would look bad	5

By far the greatest reason landowners have not leased their forestland to a maple producer is simply that they not been approached by one. Based on the information gathered via question , we expect that only % of landowners have been approached by a producer.

Where do landowners get their syrup

We asked landowners “where do you get your syrup?” in order to determine the current use and purchasing practices of landowners towards pure maple syrup. Landowners use (or nonuse) of maple syrup could have a strong influence on their desire to tap or lease their forestland. One of the most striking outcomes of this research was that only 14% of respondents indicated that they purchased artificial pancake syrup, well below the national average. Pure maple syrup makes up only a small fraction of total syrup sales on a national scale, but is obviously much higher among rural landowners in the northeast, as 90% indicated that they get pure maple syrup in some manner. This intuitively makes sense that people who have chosen to live in the countryside would prefer the natural products of their environment.

There is a tremendous possibility to reach out to landowners who are currently purchasing maple syrup for their own use. 22% stated that they get their syrup from friends/family that make it, so it is possible that they may be willing to let these folks tap their trees, assuming they live close enough. Furthermore, 45% stated that they purchase pure maple syrup from a local producer while 23% purchase pure maple syrup from the

grocery store. Since these landowners already have a preference towards utilizing pure maple syrup, they should be much more amenable to making syrup themselves and/or leasing their trees to a producer.

Conclusion

New York State has the most tappable maple trees of any state or province, yet it lags far behind Quebec and Vermont in terms of syrup production levels. There are approximately 500,000 forestland owners in NY that control over 90% of the potentially tappable trees. In order for NY to increase its production of maple syrup, it is imperative that many of these landowners become engaged in the industry. This report attempted to determine the current attitudes of these landowners towards maple production, the barriers that have prevented from using their maples for sugaring, and the incentives that would inspire them to get involved with the industry.

Qualifying for agricultural assessment is the greatest incentive landowners have to start utilizing their trees for syrup production. Whereas a landowner would need to make significant investments of time and money to be able to produce enough syrup themselves to qualify for ag assessment (\$10,000 minimum gross sales), they only need to lease at least 7 acres of forestland to another commercial syrup producer in order to qualify. Given the fact that landowners cited “not enough time” as the primary reason they have not utilized their maples for syrup production, leasing seems like the best option for many landowners.

Very few landowners are aware of ag assessment or the options for collaborating with existing maple producers. A project funded by the Northern NY Agricultural Development Program taking place this autumn is focused on educating landowners about the costs and benefits of several options so that landowners can make informed decisions on how to best utilize their maples. Please refer to Appendix 1 to view the brochure that is being mailed to 7000 landowners in the six county Northern NY region. A special webinar is also scheduled for September 23rd to focus on the same issues.

Further research will evaluate the effectiveness of these efforts and track the progress of landowners who decide to become involved with the maple industry.

The economy and prices for syrup could also have a significant impact on syrup production levels and desires for more landowners to get involved in the industry. Much of the interest in expansion occurred when bulk syrup prices rose from their normal levels of \$2-2.50/lb to \$4/lb or higher. Significant expansion has already taken place in Canada and Vermont and following a great production year in 2009, bulk syrup prices are back in the \$2.40-2.80 range. Leader Evaporator is also now selling a new check valve spout adapter that could drastically increase yields and revolutionize the industry. Once these become fully adopted, producers will be able to realize much greater yields per tap and will not need to expand the number of trees being tapped in order to increase their own production.

As with most agricultural products, the future of the maple syrup industry in New York is uncertain. There are many promising opportunities to expand production and just as many causes for concern. The survey of landowners clearly shows tremendous interest among landowners in getting involved with the industry. How successful they are and the future of maple production in NY will depend on the efforts of these landowners to produce syrup, conserve the maple resource, and maintain viable markets for pure maple products.