

# NYSMMPA IDI Findings

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**GOLIN**



# Methodology

Golin, on behalf of NYSMPA, conducted 10 in-depth interviews (IDIs) among internal stakeholders and members. Each IDI lasted around 45 minutes and were conducted virtually.

The interviews were conducted to understand their opinions of pure maple syrup as well as challenges and opportunities for the industry.

The following slides are shared experiences and comments that will help craft the next phases of the research project.



# THE INDUSTRY'S OPINION OF PURE MAPLE SYRUP



# Participants know there are many ways to educate consumers about pure maple syrup



*Common descriptions of maple syrup are natural, healthier than other sugars, minimally processed, steeped in tradition, naturally vegan, easily made organic (in most cases), and sustainable.*



"It is an all-natural, minimally processed, and highly sustainable product... The only processing as we make the syrup, we remove the water."

"It's simple, it's natural, and it's really close to the production. So, it's just better for the planet and it's better for you."

"It's delicious, pure, and it's like a taste of nostalgia."

"Maple syrup is among the oldest agronomic crops in the colonies...The process hasn't changed since native ancestors first threw hot rocks into a cauldron sap."

# One key attribute they used to describe pure maple is "healthy"

*Most described it as healthier, especially compared to cane sugar and table syrup.*

"I've got diabetes... and anything that's got corn syrup affects my sugar levels way more than pure maple does."

"This is a healthy sugar. Your body moves, you really shouldn't cut sugar out of your diet."

# But they are also aware that we cannot make health claims

*Participants felt that it was their responsibility to not facilitate irresponsible marketing and messaging.*

"Maple is probably a healthier sweetener, but sugar is sugar. I have a little difficulty with pushing the 'health' aspects of it."

"I was impressed, somewhat negatively, by the job that the sugar industry has done in knocking fats as being a health problem, and then replacing them with sugar...I do not want maple syrup advertising to go in that direction. I feel that's deceptive."



# Participants believe that one of the biggest strengths of maple is that it is not processed



*However, one thing we can own is the fact that it is pure and the harvesting of it doesn't require additional ingredients or additives*

"People are looking for a pure product, and with maple, that's exactly what it is. It comes from a tree and we concentrate it."

"There are no additives. People ask 'when do you put the sugar in?' We don't."

"If it has an ingredients list of the bottle, it's not maple."



# They are proud about maple's long history in the Americas

*Many noted that the harvesting of maple syrup has not really changed since the first records they've seen, it has a strong tradition that is passed down generations.*

"Maple syrup would be the traditional chief of the Haudenosaunee, to go back to where it came from in history"

"The largest producers were here in Wisconsin during the Civil War... the North sent armies over this way because they were cut off from their sugar supply from the South."



# Participants think their target customers are families and/or higher income individuals

*While income is a factor, there are other consumers like older individuals who have time, eco-conscious consumers as well as foodies.*

“When I see the white mid-30s family with two kids walking through the farmers market, I drop what I’m doing and try to get them to my booth.”

“We tend to see middle-aged women buying it the most. The moms of the families doing the shopping seems to be our primary audience.”

A wooden spoon with a dollop of honey is placed on a cross-section of a tree trunk. The background is filled with out-of-focus autumn leaves in shades of red, orange, and yellow. The entire image has a warm, reddish-orange color cast.

# **BARRIERS THE INDUSTRY FACES**

# The cost of pure maple syrup is said to be a key barrier for the industry

*Especially when it is placed next to cheaper options that uses the same nomenclature in its packaging.*

“It's an expensive product. If we look at people working lower wage jobs and trying to make ends meet - I think that is a problem. In some ways, we need to target the people who can afford it. The cost of production is the cost of production.

"There is no point in trying to convince someone who is trying to feed their family and scraping by, 'gee, you need to spend more on sugar.' "

# Some participants believe the “luxury” aspect of the product is also a barrier

*The price point is something that facilitates this narrative as well as the artisanal way of crafting pure maple syrup.*

"I don't agree with the perception in practice, but our society has allowed things to become a luxury item due to production."

"I have family I will gift maple syrup to, but when they go to the store, they will still buy the fake stuff due to the price difference."

"I want people to think of it more as a pantry staple."



# Participants view table syrup as the 800-pound gorilla in the room

*They see them as the largest barrier for pure maple syrup.*

"Corn syrups can hammer us because they are so cheap to make and are in liquid form. The direct competition there is a problem."

"The people that grew up with Jemima or some imitation are used to it being thicker, and so their reaction is "there's something wrong with this."

"There's just a lot more money nationwide behind those products. I've never seen the nationwide maple syrup TV commercial... The companies that produce those corn syrup-based breakfast syrups have the financial wherewithal to put their product in front."

# The industry is frustrated about the confusion between pure and imitation maple syrup



*And much of table syrup mirrors pure maple syrup for those who aren't in the know.*

“I've had people who told me ‘oh they don't like maple syrup.’ Only to discover that the only maple syrup they've had is log cabin, or a non-maple ‘maple syrup’”

“There are millions of people who haven't tried pure maple syrup, and that's where our opportunities lie.”





# Part of the industry's frustration is the fact that pure maple is seen as a topping

*The industry sees this as a barrier to expanding audiences and something that underlies the lack of education they observe.*

"People will tell us 'I don't eat pancakes' "

"You find a lot of consumers that are used to a maple flavor, and they might not like it. What they don't realize is it can be used as an additive sugar. Instead of baking with cane sugar, you can bake with maple sugar, and the benefits of that are tremendous."

"We've had a lot of we've had a lot of luck working the meat companies. Knowing and using Maple syrup as a glaze or something so like, we've partnered with several grilling companies over the last 10 years. We haven't had a meat company really get involved, but that's kind of the point of it, they're showing Maple syrup to be used."

# And due to its various uses, the industry also sees honey as a competitor



*This is due to similar consistency, various ways to use it as well as the sustainable nature of the product.*

*Its price point is lower too.*



"Honey is another natural sweetener."

"Honey is the hardest one to compete against because so many of the characteristics of maple syrup are mirrored in honey... It can't be that maple syrup is more natural because honey is just as natural. It can't be more sustainable because honey is just as sustainable."

"Honey and maple tend to be more of a competitor when it comes to an ingredient than they are as a topping, because how often do you pour maple syrup on a piece of toast?"

# Participants want to expand e-commerce, but it's not that simple



*E-commerce has become a core part of consumers' lives and they often expect free or discounted shipping and that's not easy to do with maple syrup due to its weight.*

"If for some reason they don't want to pay for shipping, and they're not local, that is a hinderance."

"Maple syrup is so heavy. We just can't compete when people expect free shipping or discounted shipping"

"...the older generation has a hard time with the technology and keeping up with it."



The image features three white plastic spoons arranged vertically on a teal background. Each spoon contains a small amount of yellow liquid. The top spoon has a single drop of liquid above it. The middle spoon is partially obscured by the text. The bottom spoon has a single drop of liquid below it. The text is centered over the middle spoon.

**THE INDUSTRY'S POV ON  
TRENDS TO TAP INTO**

# A few participants mentioned that foodies could be an audience to communicate with

*This is because those in the industry believe that those who are conscious about what they want to add to their food can be an opportunity for the industry.*

"I think for many people who are interested in food, this would be a natural product for them to be interested in. I think I think if you're not interested in food, it's probably a little harder sell."

"We had a grill company involved in a vegetarian meat and then a chef that also was promoting a book and she's known for cooking vegetarian food. So we tied it all together into a package that way in."



# They also mentioned that new pure maple products could be a way to engage new consumers



*Producers mentioned a variety of products made from syrup including maple candy, granulated sugar, maple cream, and maple syrup infusions that can do the creative work for the customer.*



"If you've had it and you have a sweet tooth, people go crazy over maple candy."

"Our barbeque sauce, we have sourced ingredients, so we have no corn syrup."

"When Bourbon barrels have done their duty and used to flavor fine bourbons and find whiskeys, Maple producers fill them with hot syrup and the flavor of the bourbon comes across in the Maple syrup and it has no alcohol in it, just the flavor."



# For producers, a way to be relevant to consumers might be through a message around “Made in America”

*Supporting local and small businesses, but also American-made products has flourished recently and could be an angle for messaging.*

“We can also stress that, in the big-box stores, a lot of the product is coming out of Canada. We can push the produced in the USA angle of it.”

"A lady asked me, 'Are you the real maple person?' We have that community support and people rally behind you."

"I think a lot of it comes from the 'shop local, support local business' mentality."

# Participants also mentioned that the sustainable production of maple could be something to persuade new audiences

*This is especially seen among younger audiences, and while the production of pure maple syrup is not carbon neutral, it has good proof points as to how it is more sustainably produced compared to other sugars.*

"From an environmental standpoint the benefits are incredible. You could have a maple forest, and you might have two options: you could either produce maple syrup or harvest the timber. What is going to be better for the environment?"

"You're going to sustain the trees because you want the profits off the maple syrup."

"As we transition consumers from other sugars, then we fix the issues with the other sweetener markets, as far as deforestation in Brazil and cane sugar plantations."



# NEXT STEPS



# AREAS TO EXPLORE

*Other than income, what other characteristics (demo and psychographic) describe current pure maple syrup consumers?*

*How would the industry want to position itself: as a luxury and niche product OR a pantry staple?*

*If cost is a barrier, what offerings or messaging could make that less of an issue for consumers?*

*Do consumers think of pure maple syrup in the context of supporting local businesses or sustainability?*

*Where are the gaps of knowledge that consumers have regarding pure maple syrup?*

*What messaging can help differentiate pure maple syrup and facilitate in educating consumers about its value proposition?*



# APPENDIX



# The industry acknowledges that marketing has been a challenge for producers

*This is because their main focus is making a profit and running the business, but also because producers like to stick to their “ways” and don’t always like change.*

"Producers are focused on making their product and it's hard for them to understand how to speak about it to others who aren't around it."

" ...the governor wanted to bring a shipment of Maple syrup with him to give to the Italian ambassador.... You get the product and I had to do that with Maple they said they don't know if we want to go into Italy because there's only one guy that goes into Europe right now."



# Participants believe that being far from where maple trees grow may fuel the confusion over pure and imitation maple syrup

*For those who don't have maple trees or sugar bushes near by the level of education and persuasion needed is higher.*

"If you went to California, people are not up on maple syrup. And there is much less of an opportunity for them to get it. It's going to be few and far between."

"...recent immigrants, especially from the Middle East and the Far East. They're just simply not familiar with it. I get a lot of a lot of people walk up and they say, and I'm sorry if this sounds horribly racist, but I'm just trying to kind of like this is what my experience has been. I get a lot of "is this honey?"

"For part of the country, it's never been in their culture. Like Southern states. They don't have maple trees. How would they have even had the chance to use it?"

# Participants believe that having imitation and pure maple syrup on the same shelf increases confusion

*Participants note that consumers seeing them side by side in the store further increases the false narrative that both products are the "same", when they are not.*

"You can put Mrs. Butterworth's or table syrup or 'all-natural table syrup' in a 12oz container on a store shelf in front of maple syrup, and it's a dollar ninety-seven cents right next to an eight-and-a-half-dollar bottle of maple syrup, and it's smaller."

"Because we sell through grocery stores, we don't have that contact with consumer... it just comes down to the sales price."

# Participants note a reason they love the industry and stayed is because of the outdoors aspect of producing maple syrup

*Maple producers mentioned that they love to spend time in the woods. The "woods" creates helpful imagery that can be used to educate and market maple syrup.*

"Frankly, I just like being in the woods. It a good place to unwind and I find it very contemplative...maple touches that for me"

"What continues to draw me in is the feeling of being out with nature and taking this source of food and cultivating it. Working alongside with the trees.

# They believe maples' association with fall/winter could be a factor in the limited use of the product

*Most people tend to associate the product with colder months, but it is harvested as winter changes to spring and its wide usages can make it more than a "seasonal" product.*

"Maple is associated with a flavor and a season. Most consumers don't know it is made in the spring, and they associate it with a fall flavor."

"A maple latte in the summertime by Starbucks"

# Participants a variety of other products as cases of successful marketing

*Participants had different perspectives on those that have been successful, but they range from potatoes and specialty waters to almonds and cranberries.*

"The potato industry with chips... look at the amount of shelf space that chips have created versus the potato itself."

"Throughout the wine world, there are people whose whole job is to describe the differences in flavor. And we don't have that language."

"You scan the bottle or take a picture of the bottle with your phone and it has these criminals on it and they come to life on your phone and start talking to you about what you're buying (in reference to 14 Crimes wine)"

# They specifically mentioned the wine industry because of the variety within the category



*And while the experience that is offered by wine and maple syrup differ significantly, it's an industry to study and learn from.*



“You can go to a wine show and have 15 vineyards there and every one of them will be successful because people want to come in and try 15 different wines and maybe buy 15 different wines.

But if I go to a farmer's market and there's two other maple syrup people there, I know that my sales will be lower because we're competing. So how did the wine people manage to get it so that having three wineries in a room is a benefit?"



# Participants believe that people need to experience the product to learn about it

*Having them see the production and trees or taste the product itself is a very effective way to educate them and show them the value of pure maple syrup.*

"If there were a smell or taste ability, like a scent in a magazine, the industry would win over every customer."

"We have to show consumers how to use it before they start using it on their own"

If we can provide a journey that is engaging enough to the consumer, than we can take price off the table [as a barrier]."

# And they think that partnerships could be a way to facilitate those experiences



*Certain producers mentioned successful partnerships with local establishments that showed consumers firsthand the taste and value of maple syrup.*

"We went into NASCAR and sponsored cars with NASCAR. The secondary purpose was to get the attention of the consumer. But the primary reason was to get the attention of a retailer."

"We will actually bring in food trucks from time to time and do events, and they'll maybe do like a special. Let's say we're bringing a barbecue truck builder we have a special barbecue sauce... or trying to do some sort of partnership with the local restaurant where they display that they use our Maple for a menu item."

"We have had a lot of luck with meat companies and using maple syrup as a glaze. We partnered with several grilling companies over the last ten years."

