



Policy Brief - The Ontario Maple Syrup Agri Food Value Chain: Enhanced Competitiveness Through Innovation and Capacity Development

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This Policy Brief is a component of the Maple Syrup Innovation Toolkit. For other components see www.resilientresearch.ca

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Maple Syrup Innovation Toolkit

This policy brief is part of a larger suite of final documents, called the Maple Syrup Innovation Toolkit, that are part of the final deliverables for this project. These documents include five summaries of work completed at earlier stages of this project, two workbooks (one Aboriginal-focused, one commercial industry-focused), a policy brief and a video (<https://www.youtube.com/watch?v=1Kp-6jvp5Ck>). The toolkit can be accessed at www.resilientresearch.ca

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Overview of Key Recommendations

Policy Recommendations for OMAFRA/Regulators

While the maple industry in Ontario provides significant social, environmental and economic benefits, the industry would benefit from additional institutional capacity to support expansion efforts and further develop an effective partnership amongst the Canadian/Ontario governments, regulators, OMAFRA and OMSPA.

Currently, OMAFRA personnel juggle several other files beyond maple and there is an increasing need for regulators to become sensitized and work effectively with different cultural groups. Maple is viewed as a low risk crop limiting the resources governments are willing to commit to oversight. Further, it has often taken a significant length of time to update the regulatory framework to meet pressing industry challenges (e.g., food safety in value-added products and standardization of the grading system across jurisdictions). Additional institutional capacity could be provided for OMAFRA personnel to re-invigorate their agricultural extension, advisory and regulatory oversight services and a government commitment to timely regulatory reviews and updates.

Robust monitoring is considered a crucial component of innovation. Regulators should support the ongoing development of the industry by continuing to take the approach that compliance starts with awareness, education and advisory services.

Within the maple industry, there are a wide variety of perspectives regarding how much regulatory oversight is appropriate for the industry. Although some still argue that the regulations are too intrusive, many more understand that the continued growth and success of the industry is dependent on producing a high quality product that adheres to food safety standards. In particular, continued diligence in monitoring lead levels and raising awareness regarding the need to eliminate lead-containing equipment from all maple production and packing operations is vital to the industry.

The regulatory framework needs to be consistently reviewed to assure that it can support industry growth, especially in the area of value-added products and services. Regulations need to be practical, of benefit to the general public, and enforceable.

Value-added products and services are one of the most important areas of significant growth and innovation in the Ontario industry. Currently, the Ontario industry sells about 85% of its syrup as a retail product (as compared to 50% for New Brunswick syrup and 10-15% for Quebec) rather than as bulk syrup.¹

It is paramount that the available maple syrup regulatory framework, at both the federal and Ontario levels, be enforced consistently, evenly and fairly.

¹ Groupe Hemlock Group Inc., 2013. *The Economics of Maple Syrup Production in Ontario*, Final Report. Produced for the Ontario Maple Producers' Association.

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This is important because consumers expect that food safety is being monitored and because it levels the playing field when no industry member has an unfair advantage resulting from not adhering to the standards. This requires that regulators are sufficiently resourced to undertake effective oversight.

Regulators should open a discussion with the industry regarding the need for specific maple regulations when the percentage of pure maple falls below 15%.

Currently, where value-added products have less than 15% maple syrup, it falls to the local health units to inspect for adherence to food safety regulations. Since any incident of food contamination could be a threat to the industry's reputation, the industry should consider discussing whether or not it might make sense to make changes to this requirement.

Dealing with invasive species and related threats requires ongoing educational outreach, active monitoring and the implementation of effective controls (where possible). These activities should continue to be important priorities for government agencies and the maple industry.

Currently, the Asian Long-Horned Beetle and the Emerald Ash Borer are two invasive species that are potentially threatening the maple industry and maple ecosystems. In addition, Lyme disease and West Nile disease are spreading across the province potentially endangering maple producers and tourists alike. Other species such as garlic mustard (*Alliaria petiolata*) are also causing concern.

Over the long-term, climate change is projected to cause significant alterations to the temperature and precipitation patterns in maple-producing regions. Government agencies working with the industry should support opportunities to decrease greenhouse gas emissions and increase adaptive capacity.

The industry should be supported to continue to reduce emissions through innovation in production and boiling efficiencies. Carbon sequestration can be encouraged through support to maintain and expand sugar maple forests and the increased utilization of Crown land for maple production. In terms of adaptation, the resourcing of, and education about, best management forestry practices can work towards keeping forests healthy in the face of climate change and other environmental threats. One promising innovation could be the translocation of sugar maple cultivars adapted to future climate conditions.²

Government agencies working with Ontario producers should continue to develop their awareness of the differences between cultural groups and further refine their education, advice and compliance approaches for working with diverse populations including Mennonite groups, First Nation and Metis peoples, and French speakers.

At minimum, key documents or summaries should be available in French and likely Anishinaabe and Haudenosaunee languages. Regulators should work with gate keepers and other key individuals to become familiar with specific cultural traditions and be able to approach groups in a culturally respectful and relevant way. Where oral cultures dominate, particularly in Aboriginal

² The topic of facilitated migration is being explored in a related research project. Please contact the research team for more details.

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communities, face-to-face two-way conversations are vital to increasing understanding on both sides.

Government agencies and regulators working with Aboriginal producers need to continue to be mindful of the rights and responsibilities of the Crown vis-a-vis Canada's First Nation and Métis peoples and the particularities of the community being consulted.

Canada's first peoples cannot be approached in the same way as other stakeholder groups; nor is a "one-size-fits-all" approach appropriate. The Crown's fiduciary responsibility must be kept in mind, including the development of appropriate mechanisms that meet "duty to consult" standards. There is also the requirement to address the particular rights, needs and preferences of the local populations being consulted.

The continued growth and development of the maple industry can be facilitated through direct financial investment and other monetary supports.

Currently, the industry association, OMSPA, is self-funded and managed by a team of dedicated volunteers. However, OMSPA volunteers take on heavy responsibilities that have the potential to lead to volunteer burnout. Direct support for OMSPA could be provided by dedicating some funding to salary support for an executive director (as New Brunswick has done). Other monetary supports could be provided through grants aimed specifically at encouraging innovation and growth across the industry.

Policy Recommendations for the Commercial Industry

Members of the Ontario maple syrup value system are encouraged to continue their commitment to key common goals including continuous improvement in food safety, ongoing innovation in producing high quality syrup and value-added products and services, and increasing market share.

Currently the maple industry is thriving and growing. A strong regulatory framework that ensures food safety is crucial to its continued success. Innovation focused on product quality, cost reduction and new product and service development have some of the greatest potential to increase value and ultimately profitability. Successful innovation typically requires some advance planning, including clear goal definition and a strong action plan.

OMSPA should continue to support, promote and expand its already robust industry network.

The maple syrup value system, especially for those involved in OMSPA, is characterized by very high levels of mutual support, trust and respect. It is clear that this network promotes reciprocal knowledge sharing, high levels of innovation and increased profitability. The further development of strategic alliances amongst members with complementary strengths and common goals could boost these benefits even more.

OMSPA should continue its push to grow its membership. It should support government efforts to identify maple producers across the province.

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For long-term organizational sustainability, the OMSPA's drive for increased membership is well-founded. Right now, the organization represents about 500 producers, including the largest in the province. It is not known exactly how many producers there are across the province; the estimate is around 2600 producers. The organization offers good value for the membership fees including access to OMSPA's new marketing campaign and logo; sugarbush and operational best management documents, a financial planning tool; newsletters, etc. The current group of dedicated volunteers could use the support of enthusiastic new members. Moreover, since members tend to stay well-informed about the latest innovations and safety regulations, the products and services produced tend to be of high quality protecting the reputation of the industry.

OMSPA already has a culture of embracing and supporting new entrants and freely sharing information. Within and beyond its current membership, the industry should strive to expand this culture even further to ensure that all communities and perspectives feel welcome and represented.

Currently, OMSPA's Information Day events and annual conference (Summer Tour) are open to non-members. This is a good start. Other opportunities could include the translation of key documents into French and the active encouragement of women as sugarmakers. In addition, the continuing dialogues between OMSPA and Aboriginal producers hold great potential for the development of reciprocally beneficial relationships.

There is room in the Ontario market for a diversity of businesses and scales of operations. Industry members should focus their operation on what makes the most sense for them.

Choosing a focus often requires undertaking some preliminary investigation about such things as target markets, existing competition, geographical location, opportunities for collaboration with other industry members, personal goals and skillset, and so on. Some may want to keep their production small and supply family and friends on a non-commercial basis. Others may want to undertake small-scale, part-time activity or wish to scale up to a full-time, year-round operation. For some industry members, perhaps the focus is just on sap – producing maple water or delivering it to a neighboring operation that has excess evaporator capacity. Another group may find that their strength and interests are in the area of repackaging and marketing bulk syrup and/or selling in the international marketplace. Others may want to focus strictly on turning pure maple syrup into value-added products.

Industry members could consider focusing less on offering the lowest priced syrup and instead, shift the emphasis onto improving quality and increasing value. Pricing should reflect the full cost of production, including the producer's time and fixed costs such as land and buildings while also remaining competitive.

Maple syrup and related products and services easily lend themselves to being marketed as a fine, gourmet food that can obtain a premium price in the marketplace. First and foremost, the quality of all products must be top notch and safe. The known health benefits of maple and its contribution to an "eating local" ethic can also be used to support the marketing of a premium product. Various types of additional certifications such as organic, woodlot and supply chain management, can be used to better access particular market segments.

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Value-added products and services are clearly a strong component of the Ontario maple industry and, where appropriate, opportunities to embrace, innovate and expand this segment could continue to be encouraged.

There are countless opportunities for developing a successful, distinctive business. Differentiation requires an understanding of the business's key strengths including building on existing knowledge, talents and interests. For some, combining several value-added components that offer consumers a suite of experiences will help maximize profitability (e.g., quality product, sugarbush tours, retail store and pancake house). Consider undertaking the workbook exercises provided in this toolkit and/or the financial planning tool available through OMSPA.

OMSPA and industry members need to continue to develop market awareness of maple syrup and related products.

The new "Sweet Ontario" marketing strategy is a great start³. Since Canadians consume 126 times more refined sugar than maple syrup, there are significant opportunities for growth in the industry. For long-time residents, maple syrup is not as engrained into the Ontario culture in the same way it is in Quebec. Moreover, Ontario is the most multicultural province in Canada and is home to immigrants from 200 countries⁴. Many new Canadians may be completely unfamiliar with maple syrup and related products. There is tremendous potential in these market segments.

For some members of the industry, the international markets offer great potential for targeted expansion. Industry leaders should continue to further develop the third party certification processes related to global food safety in the supply chain that will facilitate that expansion.

To export outside of the country, maple businesses need to be licensed by the Canadian Food Inspection Agency. However, increasingly foreign markets and larger market segments, such as chain stores, require additional verification to guarantee that the product meets safety regulations. Currently, some of the existing certification protocols (e.g., available for fruits and vegetables) do not have processes for assessing maple products.

As an industry, ongoing, active encouragement of the younger generation to get involved and 'catch the maple bug' is vital for the long-term sustainability of the industry.

Consider organizing promotions or special honours to develop this involvement. Although OMSPA currently has an award in this area, it appears to be under-utilized. Perhaps reach out to local schools and/or develop a targeted youth mentorship program.

Industry members are encouraged to map out their long-term goals and plans and to start thinking about business succession several years in advance.

The maple industry in Ontario is dominated by small, family-run businesses. Especially in these types of enterprises, the issue of succession – who will take over when the owners retire – is a daunting question. How, and to whom, the business should be passed down will likely take some

³ <http://www.ontariomaple.com/>

⁴ <http://www.ontarioimmigration.ca/en/>

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time to sort out. To help map out long-term plans, consider undertaking the activities outlined in the Maple Practices Workbook.

The industry has a number of effective mechanisms to share information and develop network relationships. OMSPA should continue with this multi-pronged approach.

These mechanisms include events such as local Information Days and province-wide annual Summer Tours. There is also a website that had recently been updated, a quarterly mail-delivered newsletter and an e-newsletter. In addition, each local region and the provincial board hold regular meetings and there are international events that can also be attended (e.g., through the International Maple Syrup Institute and the North American Maple Syrup Council). In particular, industry members continually comment that they gain significant value from face-to-face events in terms of educational value and networking. These should continue to be a key focus for the Ontario industry.

Under a changing climate, particularly in southern Ontario, the weather is projected to get both warmer and drier which will potentially stress sugar maple ecosystems. The industry can contribute to greenhouse gas reduction through innovation in fueling technologies.

Continued improvements in boiling efficiencies, including fuelling of evaporators and the use of reverse osmosis technologies not only improve profitability; they also contribute to the reduction of greenhouse gas emissions. The maintenance of healthy sugar maple ecosystems also contributes to the emission reduction efforts through the natural sequestration of carbon dioxide by maples and other tree species.

Producers should invest in best management practices⁵ to keep their sugar bush healthy and vigorous; over the long-term better managed forests are much more resilient when compared to those receiving minimal care.

Under a changing climate the risk of severe events such as ice and wind storms is likely to increase. There is also the possibility that droughts or extreme heat could compromise the health of sugar maple ecosystems. Compounding these effects is the risk from invasive species that may further compromise the vitality of the sugar bush. It is important to note that producers will get immediate benefits from a healthy maple stand in terms of better sap yields.

⁵ OMSPA members receive a sugar bush best management manual, see <http://www.ontariomaple.com/>

Introduction

This policy brief provides final recommendations to OMAFRA, regulators and industry leaders from a three year project funded by the Ontario Ministry of Agriculture, Food and Rural Affairs (OMAFRA) as well as financial support from Wilfrid Laurier University and the Ontario Maple Syrup Producers' Association. The project was undertaken with the significant involvement of industry, government, producer and academic partners as well as several students who contributed to all stages of the research.

The purpose of this project was to identify competitive, innovative opportunities for capacity development in Ontario's maple syrup agri-food value system by encouraging value-added related to new products and services, better market differentiation and stronger network relationships. It contributes to the increased profitability, sustainability and wellbeing of rural and Aboriginal communities. The stages of this project included:

1) Development of a sectoral profile to identify the value system's key players, processes, activities and inter-intra industry relationships. The profile provides baseline data on the current status of the industry.

- This stage was accomplished by undertaking 35 interviews that led to the development of two value system profiles, one for the commercial industry and one for Aboriginal producers. The insights from this stage were distilled into two summaries.

2) Evaluation of the opportunities for innovation, competitive solutions and capacity development across the value system, including the in-depth profiling of key industry leaders and elders, best/wise practice benchmarking and challenges/threats assessment.

- To meet this goal a video was produced and focus groups were undertaken at three locations in Ontario. At each location separate focus groups were held with commercial industry members and Aboriginal producers. This work led to two summaries and two Maple Practices Workbooks (Aboriginal and commercial industry). The research team also leveraged additional funds obtained through Wilfrid Laurier University to produce a summary report addressing the possibility of creating an Indigenous Maple Syrup Knowledge Network (IMSKN)

3) Development of the Maple Syrup Innovation Toolkit (MSIT) to increase stakeholder capacities, participation and profitability and encourage new industry entrants.

The MSIT includes a video highlighting the value of maple production and innovative, profitable practices and industry leaders, five summaries from the earlier stages of the project, two maple practices workbooks, and this policy brief. The MSIT is available at www.resilientresearch.ca The policy brief begins by providing an overview of value systems, the Ontario industry and maple practices. It then outlines overall recommendations for two key audiences, OMAFRA/regulators and the commercial maple industry.

Overview of Value Systems and Maple Syrup Production in Ontario

A value chain is a business's strategic activities that enhance profitability through the development of a differentiated, quality product rather than focusing primarily on cost reduction.

"Across an industry, a value system links firms from raw product, through intermediaries (channels) to the consumer in a stream of activities that promote quality and increase the product's value to the final consumer. Within a value system, competitive advantage can be gained by developing a value-added product or service that is difficult for others to copy (e.g., high-end artisan maple products and/or choosing to invest in activities that lower costs or heighten efficiency (e.g., energy efficient evaporators). Value systems thrive through high levels of inter-firm communication and collaboration to achieve chain-wide goals. These interactions build the trusting relationships and networks that underpin the development and enhancement of social capital. In the maple syrup industry, key collaborative value system goals include the continuous improvement of food safety, increasingly efficient syrup production and boosting market share in relation to other sweeteners"⁶.

In food production, 'value-added' typically refers to: 1) the increased incremental value of the food product in the market place through the processing of the raw product, and 2) the increased incremental value related to the differentiation of the product from others on the market. Incremental value increases result in higher prices and/or expanded markets.

Innovation increases incremental value across the value system through the creation of better or more effective products, processes, services, and technologies; it increases competitiveness and market share. Innovation includes quality, durability, service cost reduction and price improvements and the development of new products and services. Principles of successful innovation include clear goal definition and alignment of actions to goals, active stakeholder participation, access to information, robust monitoring and effective communication.

For this project, on the commercial side, the idea of value systems was expanded to include the concepts of economic, social and environmental sustainability. Sustainability means that the industry system supports and promotes not only on-going profitability, but also rural wellbeing and healthy ecosystems. The commercial maple syrup value system was developed to capture the key components and relationships in the Ontario industry (Figure 1). The system begins with a healthy sugar bush and culminates in a range of value-added products and services. Along the way there are myriad opportunities for industry members to find their niche and develop a thriving and innovative business. This project provides advice to industry members about product differentiation and goal setting through the two workbooks that are part of the broader toolkit.

From the economic perspective, in Ontario, there are approximately 2,600 maple producers setting out 1.3 million taps each year. In 2013, Ontario produced 2.04 million litres with an economic value of \$30.8

⁶ Brenda Murphy, Annette Chretien, and Grant Morin, accepted. Maple Syrup Value Systems and Value Chains: Considering Aboriginal and Non-Aboriginal Perspectives in R. Bullock, F. Broad, L. Palmer and P. Smith (eds), *Bridging Practice, Research and Advocacy for Community Forests in Canada*, University of Manitoba Press.

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million⁷. Additional value is provided through the sale of value-added products (e.g., maple butter, BBQ sauces, spa products) and services (e.g., pancake houses, eco-tourism).

Governance Context: Government and Industry Rules and Regulations

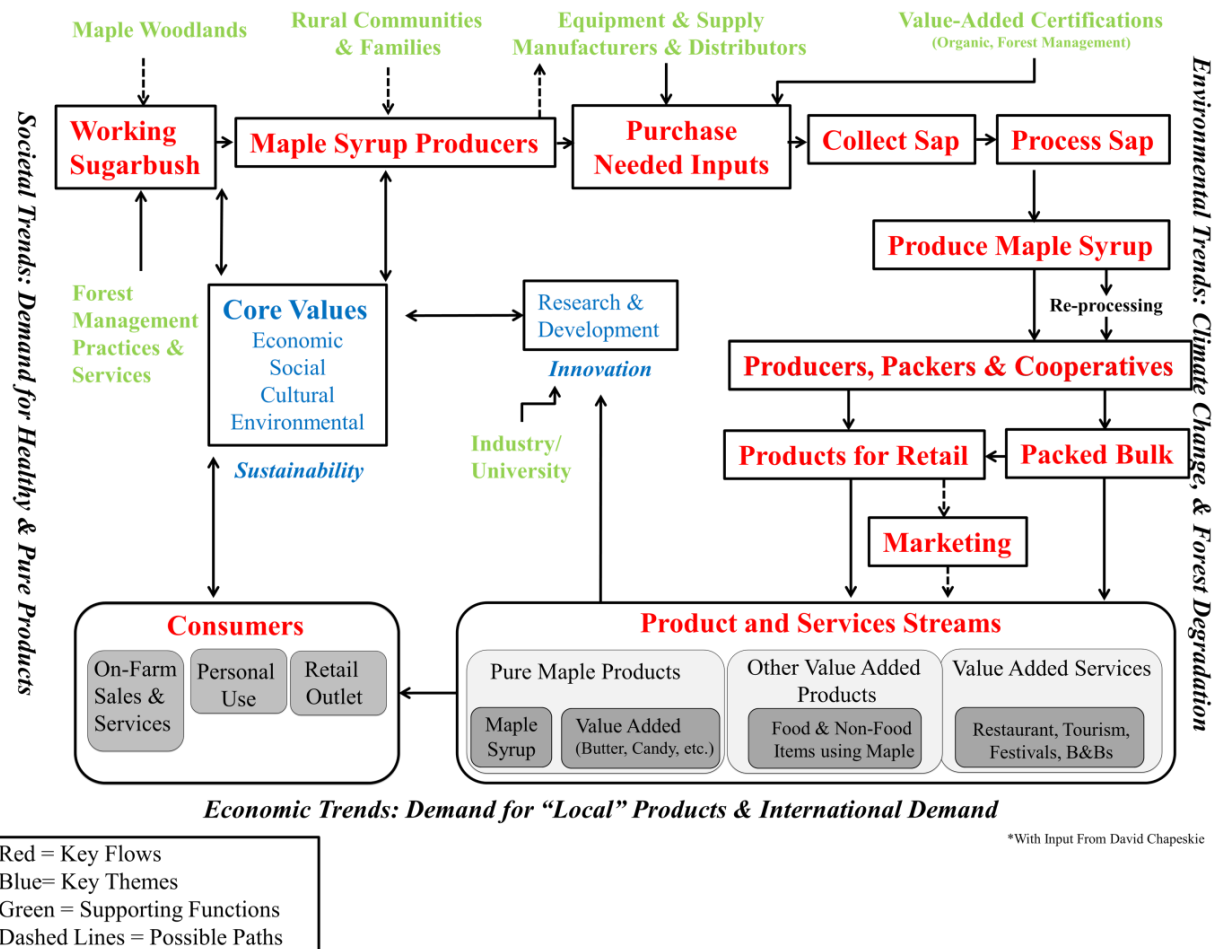


Figure 1 - Maple Syrup Commercial Industry Value System

The OMSPA maple economic report⁸ states that producer investments in equipment modernization and production efficiency led to an increase in production between 2008-11 of 1 million litres and that this growth rate is expected to continue. The report estimated the value of wealth generated from maple in

⁷ Agriculture and Agri-Food Canada Statistical Overview of the Maple Syrup Industry (2014). Available from: <http://www.agr.gc.ca/eng/industry-markets-and-trade/statistics-and-market-information/by-product-sector/horticulture/horticulture-canadian-industry/sector-reports/statistical-overview-of-the-canadian-maple-industry-2013/?id=1411740706038>

⁸ Groupe Hemlock Group Inc., 2013. *The Economics of Maple Syrup Production in Ontario*, Final Report. Produced for the Ontario Maple Producers' Association.

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2011 at \$41 million, including direct, indirect and induced gross domestic product (GDP). Indirect and induced GDP, estimated at \$36.7 million, is related to the expenses incurred during the production and processing of maple syrup and the expenditures of consumers whose jobs are made possible by the expenditures in the maple industry. An additional \$3.4 million in GDP is generated by Ontario's maple syrup festivals and pancake houses. The Ontario industry also generates significant taxation revenue; for 2011 this was estimated at approximately \$9.64 million for federal, Ontario and municipal governments.

The Ontario maple industry also builds on the socio-cultural vibrancy of rural spaces by encouraging ongoing network development and knowledge exchange amongst producers (e.g., Information Days) and by holding events (e.g., festivals, pancake breakfasts, family days) that bring together families and communities. It facilitates interaction amongst different cultural groups, particularly Mennonite and non-Mennonite producers. Increasingly, relationships between Aboriginal producers and the commercial industry are also developing. For instance, just prior to the start of OMSPA's Summer Tour 2015, the research team hosted a workshop for Aboriginal producers in a room provided by the Waterloo-Wellington Local Organizing Committee. At the meeting OMSPA's past president, Ray Bonenberg, provided information about the group. Then at the opening of the Tour's technical sessions, greetings and an opening address was provided by an Aboriginal Elder.

Environmentally, maple syrup is a premier made-in-Canada example of a non-timber forest product. Maple sap and syrup provide an alternative income stream from forests (beyond timber extraction), offers the opportunity to expand into a range of related harvesting (e.g., mushrooms) and educational/tourism (e.g., hiking trails, school tours) activities and encourages the maintenance of sugar maple (*Acer Sacharrum*) ecosystems. These ecosystems can provide a range of ecological and risk-management benefits including biodiversity, flood risk reduction and carbon sequestration.

At the same time, maple sap and syrup are also significant to Ontario's First Nations and Métis communities. For many communities, sap (sweetwater) and syrup are an important component of health, cultural and spiritual practices and revitalization, and, for some, as an opportunity for economic development. From the Aboriginal perspective, the idea of value systems was re-interpreted and mapped according to an adapted Medicine Wheel model (Figure 2). The Medicine Wheel respects the holistic approach characteristic of Aboriginal belief systems and ways of knowing. It represents the cycles of life and the interconnectedness of all things. The maple value system revolves around the idea of respect for "all my relations". This refers to the belief that all things are living sentient beings that are connected. Humans are expected to act as careful stewards on behalf of all 'relatives', both for today's generation and into the future. The value system, starting in the East, moves through the maple production seasons and four cardinal directions.

In Ontario, First Nation and Métis producers undertake a range of maple-related activities⁹. With regards to the opening of maple syrup season in Aboriginal contexts, there are some very distinctive and diverse beliefs and ceremonies practiced that are deeply rooted in traditions that can go back hundreds of years. Preparations for maple syrup making in some communities begin with midwinter ceremonies, and praying for "new babies", and the other products of spring like strawberries. These ceremonies are intended to meet the responsibilities of the ongoing relationship between people, trees and the environment. Some call these ceremonies part of how they "wake up the earth", others called it the

⁹ The information in these two paragraphs is extracted and paraphrased from: Annette Chretien, 2014. *Aboriginal Maple Values Report*. Available as part of the Maple Innovation Toolkit.

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beginning of the new year. Since maple syrup is the first product to be harvested, it represents ceremonial new life.

Most First Nation and Métis producers interviewed for this project were making syrup for family use or within the community. For these producers the technology remained fairly traditional and simple. However, some producers refused to use more recent technologies such as lines/tubes, vacuums and reverse osmosis because they felt these harvesting practices were harmful to the trees. Having said that, substantial interest was expressed in the possibilities of developing commercially viable operations if the information was made more readily available. For some, it could become a source of income if it was deemed financially feasible. The larger Aboriginal commercial producers also shared a mixture of state of the art approaches to harvesting that are still guided by traditional beliefs.

It is impossible to separate the broader challenges faced by Aboriginal producers in a contemporary world from the specific contexts of maple production. Many interviewees indicated that due to various colonial policies and other problems there were periods when making syrup was not practiced and that they are currently reclaiming knowledge from the Elders who recall it from previous generations. As young people explore their connections to identity and seek ancestral knowledge there is a re-emergence of traditional teachings. Today, there is an opening to share these ways of knowing more publicly, but the healing process is slow and there is still some distrust. Most of the producers who were interviewed were very interested in a knowledge sharing network. The type of information they were interested in sharing included traditional teachings, technologies, and harvesting and production practices. There was also much interest in mentoring young people with regards to cultural ways and teachings.

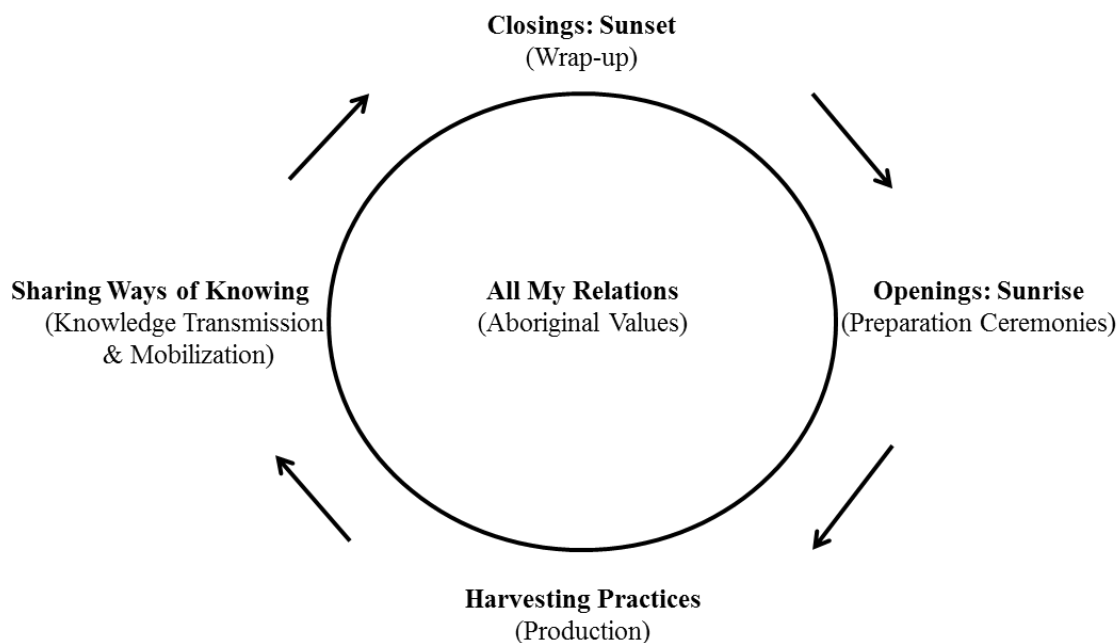


Figure 2 - Aboriginal Perspectives of the Maple Value System

Conclusion

This policy brief has provided a brief overview of the maple syrup value system in Ontario and provided some policy recommendations for two key audiences. Both government agency/regulator and industry efforts should be focused on supporting its strengths, helping it address its challenges and dealing with potential threats. The chief take-away message from this work is that the industry is thriving, innovating and growing and provides significant social, economic and environmental value across Ontario's rural landscape.

Appendix A – Team Members

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