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Statistical Overview of the Canadian Maple Industry **2020**

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August 2021



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Electronic version available at

<https://agriculture.canada.ca/en/canadas-agriculture-sectors/horticulture/horticulture-sector-reports>

ISSN: 2562-8763

AAFC no. : 13082E

Catalogue no. : A71-40E-PDF

Paru également en français sous le titre :

Aperçu statistique de l'industrie de l'érable du Canada, 2020

ISSN: 2562-8771

AAC no. : 13082F

Catalogue no. : A71-40F-PDF

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Overview

The Canadian maple syrup industry accounts for approximately 75% of the world's maple syrup production, with 92% of the Canadian production originating from Quebec, 4% from New Brunswick, 3% from Ontario, and 1% from Nova Scotia. The United States is the world's second-largest producer, accounting for approximately 24% of global production, with 51% of United States production originating from Vermont, 18% from New York, and 13% from Maine.

Due to favourable weather conditions, Canadian maple producers harvested 14.3 million gallons of maple syrup in 2020, surpassing the 2019 record of 13.2 million gallons produced by 8.3%. The increased production resulted in total sales of \$558.5 million in 2020, up 7.9% from a year earlier. Maple products accounted for 6.4% of all Canadian horticulture farm cash receipts¹ in 2020.

Despite the increased production and sales in 2020, the COVID-19 shutdowns impacted the short maple syrup season across Canada in 2020. During the early stages of the COVID-19 pandemic, where measures such as physical distancing were implemented just as the maple syrup season was commencing, in-person visits to farms, sugar shacks and other activities that normally draw large crowds were not possible. In response to this reduction in ecotourism, some producers shifted focus towards online sales.

Canada is the world's largest exporter of maple products in terms of value and volume, with exports valued at \$515 million in 2020, up 19.8% from 2019. In terms of value, Quebec accounted for 96.4% of Canadian maple product exports in 2020. Canadian maple products were exported to 68 different countries around the world in 2020; 59.1% of the exports were destined to the United States, 9.8% to Germany, 6.0% to the United Kingdom, 5.2% to Australia, and 4.8% to Japan, and 4.4% to France, with the other export destinations accounting for the remaining 10.8% of total exports.

¹ Farm cash receipts measure gross revenue of farm businesses. They represent the cash income received from the sale of agricultural commodities.



1. Production²

As maple trees grow, they accumulate starch, which converts into sugar during the spring thaw and mixes with the water absorbed through tree roots to create maple sap, which generally flows between February and April each year. Producers use tubing systems, reverse osmosis and high-performance evaporators to collect sap and boil it down to create maple syrup. On average, it takes approximately 40 litres of sap to make one litre of maple syrup. Canadian maple syrup products range from traditional maple syrup to maple sugar, maple butter, maple candy as well as a full range of products containing maple syrup.

The safety and quality of Canadian maple syrup is monitored by the Canadian Food Inspection Agency (CFIA), which ensures producers meet high federal standards. The CFIA is also responsible for the federal classification of Canadian maple syrup grades and colour descriptors, ensuring they align with standard international grading systems. There are two grade names for Canadian maple syrup: “Canada Grade A” (which is further graded into four colour classes - “Golden, Delicate Taste”, “Amber, Rich Taste”, “Dark, Robust Taste” and “Very Dark, Strong Taste” – that typically reach consumer and commercial markets) and “Canada Processing Grade”, which does not have colour classes and is often used in large-scale commercial applications.

Quebec producers, who account for 92% of Canadian production, harvested 13.2 million gallons in 2020, up 9.8% from 2019. Higher yields, due to favourable spring weather and more taps, accounted for the higher production. While prices in other maple-producing provinces are determined by producers and as a result, can vary substantially, prices in Quebec are controlled by the *Régie des marchés agricoles et agroalimentaires du Québec*, which helps stabilize the price from year to year. The price in Quebec for 2020 remained at \$38.55 per gallon and the total value of maple products was \$509.2 million.

Producers in New Brunswick - the second largest producer of maple products - accounted for \$20.6 million worth of maple syrup, down by 11.1% from a year earlier, in part due to lower production (following a strong performance in 2019) and lower prices for bulk syrup. Production was down by 6.2% and producers received \$2.05 less per gallon in 2020 compared with a year earlier, for an average of \$36.78 per gallon.

In 2020, production and overall value decreases were also noted in Ontario and Nova Scotia compared to strong 2019 production levels. In Ontario, production fell by 7.0% to 467,000 gallons in 2020, with a 2.9% decrease in value to \$25.8 million, while the value per gallon increased to \$55.16. In Nova Scotia, production decreased by 20.0% to 56,000 gallons, with a drop in value to \$2.9 million (-25.9%), with the value per gallon also falling by 7.4% to \$50.89.

² Maple products production data for 2021 will be released by Statistics Canada in December 2021.



1.1. Maple syrup production¹ by province (thousands of gallons²)

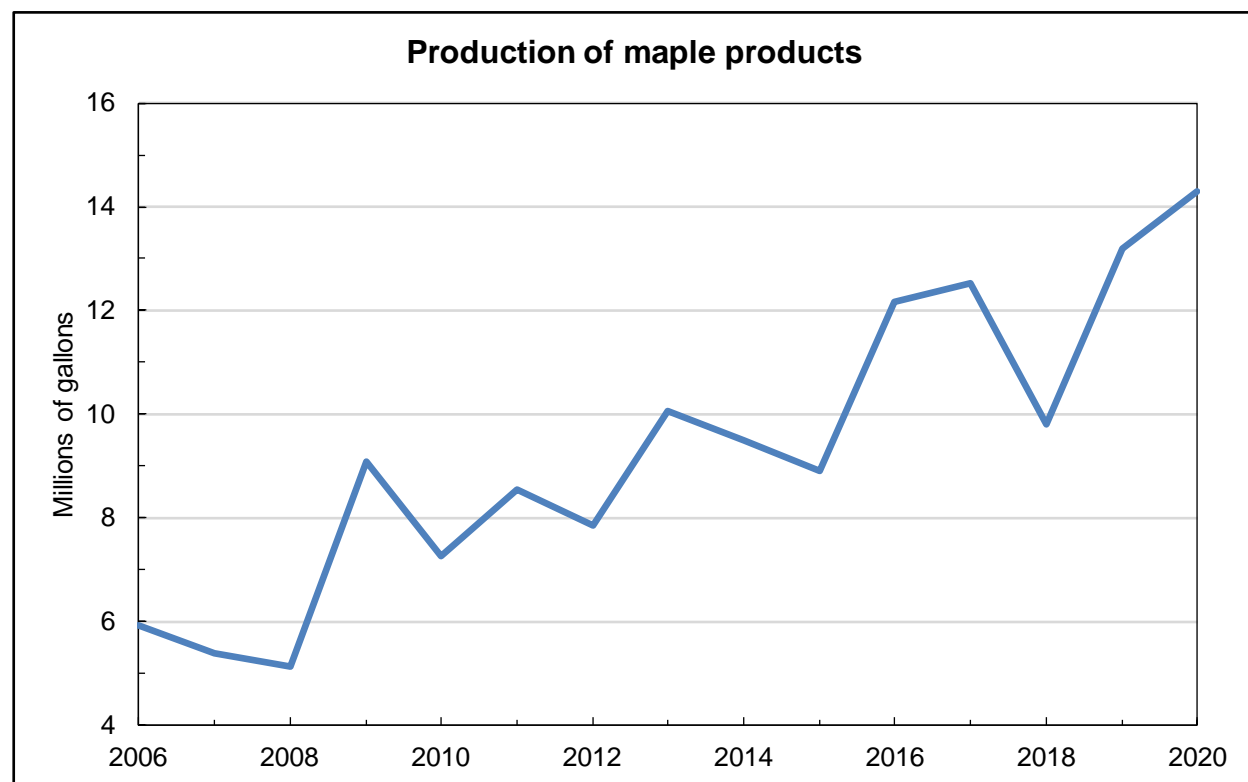
	2016	2017	2018	2019	2020	2020 % Share
Nova Scotia	48	43	55	70	56	0%
New Brunswick	528	551	361	598	561	4%
Quebec	11,185	11,493	8,914	12,033	13,210	92%
Ontario	398	425	465	502	467	3%
Canada	12,160	12,512	9,796	13,204	14,294	100%

Notes:

1. Maple products such as taffy, sugar and maple butter have been converted to syrup equivalent.
2. Conversion factors: 1 gallon of syrup equals 10.0 pounds of maple sugar. One gallon of syrup weighs 13.24760 pounds. One gallon of syrup equals 10.4 pounds of taffy. The conversion of maple taffy to syrup varies with the density of syrup that year.

Source: Statistics Canada. Table 32-10-0354-01 Production and value of maple products (x 1,000)

1.2. Production of maple products – 15-year trend





1.3. Number of maple farms^{1,2} by province

	2011	2016
Newfoundland and Labrador	1	0
Prince Edward Island	2	1
Nova Scotia	36	48
New Brunswick	108	111
Quebec	4,674	4,776
Ontario	416	391
Manitoba	6	6
Saskatchewan	0	2
Alberta	0	0
British Columbia	5	5
Canada	5,248	5,340
Notes:		
1. The last Census of Agriculture was conducted in 2016. The next Census of Agriculture will occur in May 2021.		
2. Number of farms includes all farms reported maple taps, and not exclusively farms in which maple syrup production represents 50% or more of total farm cash receipts.		
Source: Statistics Canada. Table 32-10-0166-01 Farms classified by farm type		

1.4. Number of maple taps¹ by province

	2011	2016
Newfoundland and Labrador	x	0
Prince Edward Island	9,693	9,760
Nova Scotia	372,452	446,300
New Brunswick	1,896,773	2,285,785
Quebec	40,632,512	42,529,033
Ontario	1,508,651	1,713,022
Manitoba	8,251	5,961
Saskatchewan	5,917	1,490
Alberta	x	0
British Columbia	3,609	4,009
Canada	44,440,024	46,995,360
Notes:		
1. The last Census of Agriculture was conducted in 2016. The next Census of Agriculture will occur in May 2021.		
X: Suppressed to meet the confidentiality requirements of the Statistics Act.		
Source: Statistics Canada. Table 32-10-0423-01 Maple taps		



1.5. Gross value¹ of maple products by province (thousands of Canadian dollars)

	2016	2017	2018	2019	2020	2020 % Share
Nova Scotia	3,200	2,473	3,069	3,847	2,850	0.5%
New Brunswick	22,023	22,003	13,715	23,217	20,630	3.7%
Quebec	435,600	444,570	344,834	463,889	509,250	91.2%
Ontario	23,286	24,947	23,913	26,535	25,759	4.6%
Canada	484,109	493,992	385,531	517,489	558,489	100.0%

Note:

1. The gross value of maple products includes maple sugar, maple syrup, maple taffy and maple butter.

Source: Statistics Canada. Table 32-10-0354-01 Production and value of maple products (x 1,000)



2. Trade

Canada is the world's largest exporter of maple products, with exports valued at \$515 million in 2020, up 19.8% from 2019. This was a marked year-on-year increase in export growth as compared to 2019, when exports experienced a 6.0% increase compared to 2018.

In terms of value, Quebec accounted for 96.4% of Canadian maple product exports in 2020. Export values from Quebec grew by 19% compared to 2019, while New Brunswick and Ontario also experienced strong increases in maple product export values. In 2020, New Brunswick, which accounted for 2.7% of total Canadian exports by value (for a total of \$13.8 million, up 27.6% over 2019). While Ontario only accounted for 0.8% of Canada's overall maple product exports in 2020 (\$4.2 million), the province experienced a very significant increase of +335.9% in export values compared to 2019. This sharp increase was the result of exports to new markets other than the United States, which had been the exclusive export destination for Ontario maple products prior to 2020. These new markets included Ireland, Japan and Denmark.

Canadian maple products were exported to 68 different countries around the world in 2020; 59.1% of the exports by value were destined to the United States, 9.8% to Germany, 6.0% to the United Kingdom, 5.2% to Australia, 4.8% to Japan, and 4.4% to France, with the other export destinations accounting for the remaining 10.8% of total exports.

Over the last five years, export volumes to each of these same six countries have shown strong growth, for the most part. In comparing 2016 to 2020, export volumes grew by 86.6% to France, 55.0% to Australia, 47.3% to the United Kingdom, 32.6% to the United States, 20.9% to Germany, and 1.7% to Japan.



2.1. Exports

2.1.1. Maple products¹ exports by province – by value (thousands of Canadian dollars)

	2016	2017	2018	2019	2020	2020 % Share
Newfoundland and Labrador	1	0	0	5	0	0.0%
Prince Edward Island	0	23	211	3	7	0.0%
Nova Scotia	558	520	129	210	196	0.0%
New Brunswick	17,168	10,808	9,660	10,811	13,794	2.7%
Quebec	362,324	369,001	394,812	417,486	496,725	96.4%
Ontario	773	171	356	963	4,198	0.8%
Manitoba	0	0	0	0	0	0.0%
Saskatchewan	0	0	50	0	0	0.0%
Alberta	194	118	1	74	0	0.0%
British Columbia	390	702	419	393	355	0.1%
Canada	381,407	381,342	405,638	429,944	515,276	100.0%

Note:

1. Maple Products include both maple sugar and maple syrup.

Source: Statistics Canada (CATSNet, April 2021)

2.1.2. Maple products¹ exports by province – by volume (kilograms)

	2016	2017	2018	2019	2020	2020 % Share
Newfoundland and Labrador	55	22	44	501	0	0.0%
Prince Edward Island	0	2,111	27,387	254	808	0.0%
Nova Scotia	62,237	49,940	14,436	19,297	31,119	0.1%
New Brunswick	1,940,942	1,304,800	1,168,890	1,339,734	1,574,507	2.6%
Quebec	42,917,697	44,427,902	47,076,873	49,178,196	58,993,618	96.2%
Ontario	110,150	23,329	52,487	135,161	676,457	1.1%
Manitoba	0	0	0	0	0	0.0%
Saskatchewan	0	0	4,610	0	0	0.0%
Alberta	24,001	20,471	89	12,708	7	0.0%
British Columbia	37,136	70,997	36,581	34,319	32,508	0.1%
Canada	45,092,218	45,899,572	48,381,397	50,720,170	61,309,024	100.0%

Note:

1. Maple Products include both maple sugar and maple syrup.

Source: Statistics Canada (CATSNet, April 2021)



2.1.3. Top 10 maple products export destinations – by value (thousands of Canadian dollars)

	2016	2017	2018	2019	2020	2020 % Share
United States	236,279	236,104	250,472	266,559	304,347	59.1%
Germany	40,043	40,721	44,872	42,121	50,381	9.8%
United Kingdom	16,584	17,733	18,567	21,698	30,753	6.0%
Australia	15,650	17,627	17,500	18,832	26,814	5.2%
Japan	25,756	22,945	22,233	23,441	24,788	4.8%
France	13,049	12,743	13,436	16,705	22,438	4.4%
Denmark	6,137	5,127	6,327	7,510	8,710	1.7%
South Korea	4,152	3,903	5,303	4,720	7,746	1.5%
Netherlands	3,647	3,659	4,325	4,032	5,221	1.0%
Italy	2,464	2,355	2,634	2,893	3,742	0.7%
Others	17,646	18,424	19,969	21,432	30,336	5.9%
Total	381,407	381,342	405,638	429,944	515,276	100.0%

Source: Statistics Canada (CATSNet, April 2021)

2.1.4. Top 10 maple products export destinations – by volume (kilograms)

	2016	2017	2018	2019	2020	2020 % Share
United States	27,886,052	28,588,821	30,217,674	32,121,874	36,971,390	60.3%
Germany	4,540,965	4,622,930	5,003,007	4,867,966	5,489,090	9.0%
United Kingdom	2,442,606	2,430,610	2,422,084	2,467,531	3,597,468	5.9%
Australia	1,958,243	2,179,867	2,130,864	2,114,086	3,036,087	5.0%
France	1,594,766	1,579,595	1,654,308	2,103,193	2,975,166	4.9%
Japan	2,679,569	2,489,628	2,410,106	2,506,567	2,724,174	4.4%
Denmark	868,629	730,988	908,839	994,561	1,248,573	2.0%
South Korea	471,750	484,602	670,121	528,207	829,675	1.4%
Netherlands	390,935	388,048	482,083	433,496	564,763	0.9%
Sweden	18,469	20,262	5,156	60,398	511,981	0.8%
Others	2,240,234	2,384,221	2,477,155	2,522,291	3,360,657	5.5%
Total	45,092,218	45,899,572	48,381,397	50,720,170	61,309,024	100.0%

Source: Statistics Canada (CATSNet, April 2021)



3. Availability for consumption

3.1. Maple products available¹ for consumption² (kilograms per person)

While consumption of sweet condiments has generally declined due to health-related concerns, maple syrup is an exception. Maple sugar available for consumption more than doubled from the previous year to 0.89 kilograms in 2020, because of a record high production (+8.3%). Similar to maple sugar availability increase, refined sugar availability rose 1.4% from 2019 to 30.5 kilograms, as a result of higher production (+4.7%) and imports (+5.1%). Both increases may have been related to panic buying at the onset of the pandemic.

	2016	2017	2018	2019	2020
Maple Sugar	0.32	0.32	0.34	0.36	0.89
Notes: 1. Food available per person is calculated by dividing the domestic disappearance by the Canadian population as of July 1st of the reference year, at the retail level. Domestic disappearance represents the total food available for human consumption from the Canadian food supply chain. Total Supply = Beginning stocks + Production + Imports Domestic Disappearance = Total supply – Exports – Manufacturing - Waste - Ending stocks 2. Does not adjust for losses, such as waste and/or spoilage in stores, households, private institutions or restaurants, or losses during preparation. Source: Statistics Canada. Table 32-10-0054-01 Food available in Canada					



4. World data

4.1. World imports

Globally, the United States is the largest importer of maple syrup and sugar products measured by both value and volume, while Canada ranks as the 8th largest importer of maple syrup and sugar products in terms of value and the 5th in terms of volume. Canada's imports originate almost exclusively from the United States. In 2020, the United States' imports of maple syrup and sugar products accounted for 49% of total global imports in terms of value. Other main global importing countries included Germany (7%), United Kingdom (6%), Japan (5%), Australia (4%), France (4%), Netherlands (3%) and Canada (2%).

4.1.1. Top 10 importers of maple sugar and maple syrup – by value (thousands of Canadian dollars)

	2016	2017	2018	2019	2020	2020 % Share
United States	236,408	236,165	250,548	266,617	304,501	48.5%
Germany	29,688	30,120	36,683	37,605	43,993	7.0%
United Kingdom	25,500	25,610	25,264	31,417	37,347	6.0%
Japan	29,962	29,449	27,428	28,783	28,825	4.6%
Australia	17,533	20,866	19,985	22,021	27,291	4.3%
France	13,784	16,121	16,349	23,512	26,607	4.2%
Netherlands	16,918	17,077	19,659	11,574	21,939	3.5%
Canada¹	21,980	17,078	14,780	14,710	15,495	2.5%
Denmark	6,810	7,150	8,522	8,470	10,406	1.7%
Italy	6,747	4,648	5,772	8,274	10,295	1.6%
Others	61,329	65,289	69,166	72,711	100,716	16.1%
Total	466,658	469,572	494,157	525,693	627,415	100.0%

Note:

1. 100% of Canadian imports of maple products are sourced from the United States.

Source: Global Trade Tracker (April 2021)



4.1.2. Top 10 importers of maple sugar and maple syrup – by volume (metric tons)

	2016	2017	2018	2019	2020	2020 % Share
United States	27,947	28,593	30,230	32,126	36,990	48.6%
United Kingdom	3,718	4,161	4,498	4,943	4,741	6.2%
Germany	3,154	3,151	3,732	4,052	4,534	6.0%
Australia	2,280	2,742	2,509	2,493	2,826	3.7%
Canada¹	3,532	2,957	2,506	2,594	2,624	3.5%
France	1,566	1,891	1,776	2,563	2,608	3.4%
Japan	2,649	2,658	2,469	2,588	2,577	3.4%
Netherlands	2,309	2,291	2,107	1,155	2,286	3.0%
Italy	3,462	612	531	744	1,654	2.2%
Puerto Rico	315	258	249	290	1,594	2.1%
Others	9,382	10,032	9,675	14,449	13,602	17.9%
Total	60,314	59,346	60,281	67,996	76,035	100.0%

Note:

1. 100% of Canadian imports of maple products are sourced from the United States.

Source: Global Trade Tracker (April 2021)



4.2. A Comparison: United States national statistics for maple syrup

The United States produced a total of 4.4 million gallons of maple syrup in 2020, up 5% from the previous year, with an estimated production value of US\$ 129 million, making it the second largest producer in the world behind Canada. Maple syrup production in the United States occurs mainly in the Northeast and the northern Midwest. Vermont is the country's top maple syrup-producing state and accounts for over half of the nation's production (or 51% of total production), followed by New York with 18%, Maine with 13% and Wisconsin with 6%.

4.2.1. United States maple syrup production by state (thousands of gallons)

	2016	2017	2018	2019	2020
Vermont	1,900	2,000	1,940	2,070	2,220
New York	707	760	806	820	804
Maine	675	715	539	520	590
Wisconsin	235	207	225	270	265
Michigan	124	150	165	195	170
Pennsylvania	163	165	142	157	169
New Hampshire	176	160	163	148	154
Others	204	228	219	0	0
United States	4,184	4,385	4,199	4,180	4,372

Source: USDA, National Agricultural Statistics Service - <http://www.nass.usda.gov/>

4.2.2. United States maple syrup production value by state (thousands of US dollars)

	2015	2016	2017	2018	2019
Vermont	46,530	57,000	54,000	54,320	57,960
New York	25,242	31,320	29,640	26,114	26,404
Maine	15,484	20,250	24,096	21,668	14,664
New Hampshire	9,148	9,715	6,960	9,144	6,704
Wisconsin	7,117	7,873	6,500	7,290	8,775
Michigan	7,358	5,555	7,680	6,419	9,477
Pennsylvania	5,933	5,118	5,660	5,538	5,495
Others	10	10	11	11	0
United States	126,820	147,240	145,346	141,825	129,479

Note:
2020 maple syrup production value data was not available at the time of writing.
Source: USDA, National Agricultural Statistics Service - <http://www.nass.usda.gov/>



5. Key resources

Global Trade Tracker

Statistics Canada. Table 32-10-0166-01 Farms classified by farm type

Statistics Canada. Table 32-10-0423-01 Maple taps

Statistics Canada. Table 32-10-0354-01 Production and value of maple products

Statistics Canada. Table 32-10-0054-01 Food available in Canada

Statistics Canada. CATSNET

USDA. National Agricultural Statistics Service

Import and export data is based on the following Harmonized System Codes (H.S. Codes):

Maple for import: 1702200010, 1702200020

Maple for export: 17022010, 17022020, 17022021, 17022029