



Qualitative Research For Maple Syrup

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Table of Contents

Background	3
Objectives	4
Methodology	5
Respondent Specifications	6
Statement of Limitations	7
Summary of Findings	8
Maple Syrup Associations & Imagery	22
Maple Syrup Awareness & Usage	25
Maple Syrup Sources	30
Usage/Cookery	36
Selection & Purchase	39
User Segments	45
Maple Syrup ideas and suggestions	49
Next Steps/Recommendations	53



Background

- The Pennsylvania Maple Syrup Association) is interested in learning more about consumer awareness of and attitudes toward Pennsylvania maple syrup and usage of maple syrup and products made with maple syrup
- In order to gain these insights, focus groups were conducted among key consumer groups in three important Pennsylvania markets - - Philadelphia, Pittsburgh and Lancaster County/Lititz
- Learning from this research may be used in strategic and promotional development, consumer outreach/education and other efforts to help increase Pennsylvania maple syrup awareness, purchase and consumption



Objectives

- Objectives of this research have been to:
 - Examine current awareness and knowledge of maple syrup, including - - the difference between “real” maple syrup vs. maple-flavored products, health/nutritional benefits of maple syrup, sources of maple syrup, etc.
 - Examine current use of maple syrup, particularly in cooking/food preparation and identify information sources for maple syrup usage ideas and recipes
 - Explore awareness of and attitudes toward Pennsylvania maple syrup, determine meaning and value of “local” when buying maple syrup
 - Generate consumer ideas for new products/uses featuring Pennsylvania maple syrup



Methodology

- Six (6) focus groups were held - - two groups per market - - one group among Heavy Users and one with Medium Users
- Groups were moderated by Kathryn Coriell on the following dates:
 - December 19, 2016 - - Philadelphia PA - - 17 participants
 - December 20, 2016 - - Pittsburgh PA - - 22 participants
 - March 16, 2017 - - Lancaster/Lititz PA - - 23 participants
- A total of 62 respondents participated
- Each group was 1 ½ to 2 hours long



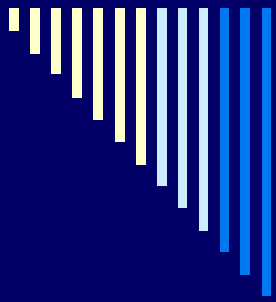
Respondent Specifications

- ❑ Primary or shared grocery shoppers who use maple syrup regularly for purposes other than pancakes/waffles
- ❑ All currently and regularly purchase maple syrup and/or maple flavored syrup
- ❑ Heavy Users - - consume maple syrup at least 4x/month
- ❑ Medium Users - - consume maple syrup at least 1x every 2 months
- ❑ All groups - - mix of gender, age, occupation, education, income and ethnicity represented
- ❑ All screened for security, past participation, articulateness



Statement of Limitations

- Research findings are based upon qualitative exploration of topics. Conclusions and recommendations are hypotheses, therefore, further broad scale research is needed for verification.



Summary of Findings



Overview of Results

- Results of this research support category observations that maple syrup is moving beyond its long-time identity with breakfast and as an essential topping for pancakes, waffles, or French toast
- Maple syrup is currently trending - - its popularity evidenced by:
 - the proliferation of maple syrup and maple flavored products in supermarkets and other retailers
 - the inclusion of maple syrup as an ingredient in a multitude of foods and recipes, such as smoothies, cocktails, baked goods, meats, and more
 - consumers gravitating to maple syrup as an alternative sweetener
 - health-conscious consumers embracing maple syrup for its nutritional benefits
 - maple syrup use expanding to categories such as skincare, hair care
 - health and gourmet gurus encouraging consumers to use more maple syrup in publications (print and online) and broadcast (talk shows, etc.)



Overview of Results

- In all three markets and segments participants exhibit confusion regarding the identity of real maple syrup
- During introductions and discussion participants often identify and refer to the brand of maple syrup they most recently bought and currently use as Log Cabin, Aunt Jemima or Mrs. Butterworth
- Unaided, participants know maple syrup originates from Canada and the US - - Vermont, Maine, New York, New Hampshire
- Awareness of Pennsylvania maple syrup is low (only one or two in each group), even in markets such as Pittsburgh and Lancaster/Lititz where production of maple syrup occurs



Overview of Results – cont'd

- Some lifelong Pennsylvania residents admit they had no idea maple syrup was produced in Pennsylvania and express surprise
- The purchase decision for maple syrup mainly occurs at the store shelf with little thought of branding or product attributes
- Most buy whatever is cheapest or on sale, often the store brand
- Brand names of maple syrup are not known or recalled
- Results of this research indicate:
 - a need to raise awareness that maple syrup is produced in Pennsylvania in order to spark consumer interest in Pennsylvania maple syrup and increase sales and usage
 - maple syrup is basically considered a commodity which presents a challenge and opportunity for Pennsylvania maple syrup to distinguish itself, raise awareness, create demand



Overview of Results

- the purchase decision is likely to be made at the time and location of purchase - - therefore, maple syrup shelf presence, labeling and packaging is critical
- there is consumer interest in purchasing and supporting locally sourced Pennsylvania products, including maple syrup
- the meaning of “local” may be only 50-100 miles from home, suggesting regional labeling, such as Lancaster County



Overview of Results

- Strategically, this learning suggests raising awareness at the grass-roots/community level, utilizing direct consumer contact in retail outlets and communications
 - Many suggested in- store tastings or cooking demonstrations
 - Consumers would like recipes or alternatives usages for maple syrup
- Since most consumers are unaware of Pennsylvania maple syrup they are unlikely to reach out to retailers or to sources such as internet/social media to seek out Pennsylvania maple syrup or information about it



Next Steps

- Results of this research suggest that the following may assist with efforts to raise awareness and increase purchase/use of Pennsylvania maple syrup:
 - Increase retail presence in all supermarkets, big box stores, specialty stores, Farmer's Markets, etc. Consider additional product placement in any location where Pennsylvania souvenirs are sold - - including airports, train and bus stations, state parks, welcome centers, camp grounds, etc.



Next Steps

- Expand retail category shelf presence to include all potentially usage-related aisles/areas such as meat/fish/poultry (basting/ marinade/glaze), sugar/agave/honey (as alternative sweetener), ice cream (with syrups/toppings), baking (recipes/flavoring), salad dressing/condiments (basting/recipes), produce (fruit/veggie recipes), beverage (cocktail mixer), nuts/snacks (recipes for nuts, popcorn), cereal (add to oatmeal, etc.), frozen foods (next to waffles/pancakes), holiday/seasonal displays, PA Preferred shelf/section with other Pennsylvania products, etc.



Next Steps

- Emphasize Pennsylvania branding/packaging - - call attention to Pennsylvania origins with strong labeling/messaging, including images, maps/information about specific origin/location, novelty packaging such as Keystone-shaped bottles, tags with information/history of Pennsylvania maple syrup, POP material that pinpoints and highlights Pennsylvania maple syrup at the shelf in all areas of supermarkets and other retailers
- In-store demonstrations/sampling/tasting - - implement broad-based regular and frequent Pennsylvania maple syrup sampling/tasting in supermarkets, warehouse clubs, Farmer's Markets, malls/shopping centers, etc. with recipes, usage ideas



Next Steps

- Media - - capitalize on the fact that Pennsylvania maple syrup is likely to be news to most residents and use it as an opportunity to increase state-wide media efforts in print, broadcast (local talk shows and radio/TV spots), billboards, direct mail, etc.
- Education - - consider school programs statewide, providing lesson plans/classroom materials, field trip opportunities, etc.
- Pennsylvania Private Label - partner with food and grocery chains headquartered in PA to provide PA maple syrup for their private label products. Currently using maple syrup from NY, VT and Canada



Next Steps

- Travel/tourism - - develop/promote maple syrup tours similar to those offered in other maple-producing states. Partner with local inns, B&B's (see New York Times, March 19, 2017 Travel section) and Pennsylvania tourism bureau
- Partner with other products/brands, such as ice cream, bacon, ham, snack foods (chips/nuts/pretzels, popcorn), etc. - - include Pennsylvania maple syrup as a key ingredient and feature it prominently on the label. Consider Pennsylvania and national brands
- Partner with restaurants, particularly those embracing the current trend to prepare and serve locally-sourced healthier foods. Give them the opportunity to feature Pennsylvania maple syrup in recipes and promote and sell product as well



Next Steps

- Food expos/fancy food/farm shows - - make appearances at as many agricultural and fancy food shows as possible to distribute information, sample product and network with retailers
 - ▣ This would include shows where Pennsylvania products are showcased or has a dedicated aisle
- Sports - - consider opportunities to become the “official” maple syrup of Pennsylvania college and professional teams. Promote this distinction with package labeling, retail signage, game day sampling, giveaways, etc.



Target Users for Pennsylvania Maple Syrup

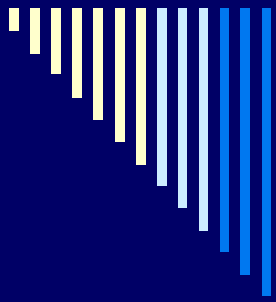
- Results of this research suggest the relative potential among several consumer segments
- High potential for Pennsylvania maple syrup:
 - Maple syrup loyals - - committed to using “real maple syrup”, recognize and reject maple-flavored syrups as imitation, perceive them as unhealthy, poor tasting, processed, full of chemicals
 - Maple syrup loyals/locavores - - committed to “real maple syrup” and local products - - the closer to home the better. This segments represents an opportunity on several levels - - locavores who value and proactively support the local farms/economy and food purists who seek out superior natural or organic products



Target Users for Pennsylvania Maple Syrup

- Moderate potential for Pennsylvania maple syrup:
 - Dual users - - consume both real maple syrup and maple-flavored syrups. Purchase maple-flavored syrups for daily pancake/waffle use and use by kids. Purchase and use real maple syrup for self, recipes, special occasions, guests, etc. Potential for Pennsylvania maple syrup to capture a greater share of their maple syrup use

- Low potential for Pennsylvania maple syrup:
 - Maple syrup rejecters and/or maple-flavored syrup regular users - - admit they prefer the taste/texture of maple-flavored syrups, express brand familiarity/loyalty to Log Cabin or Mrs. Butterworth that they grew up using, perceive real maple syrup as too expensive, not really worth the price



Maple Syrup Associations & Imagery



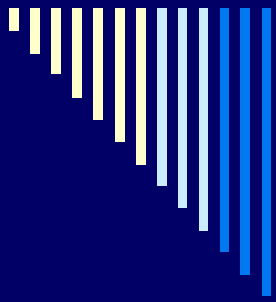
Maple Syrup Associations/Imagery

- Unaided top-of-mind associations for maple syrup are consistent across groups, segments and markets
- Associations reveal the multi-faceted and broadly dimensional product personality of maple syrup
- Associations are rich and offer potential for creative mining in promotional efforts
- Product related - - sweet, sticky, thick, flavorful, aromatic, rich, expensive
- Emotional - - comfort food, cozy food, holidays, memories, souvenir/memento of travel to Canada, Vermont



Maple Syrup Associations/Imagery

- Seasonal/event - - holiday meals/recipes and (mainly in Pittsburgh/Lancaster/Lititz) maple festivals, maple queen, tree tapping, school field trips
- Packaging - - maple-leaf or log-cabin shaped glass bottles, tins, jugs
- Foods/meals - - breakfast, brunch, foods such as waffles, pancakes, French toast; ham/sausage/bacon, fudge/candy



Maple Syrup Awareness and Usage



Awareness & Usage

- Real maple syrup vs. maple-flavored syrup - - awareness and understanding of what constitutes real vs. imitation syrup among participants is often inconsistent and/or inaccurate:

“Syrup is syrup to me” Pittsburgh Medium User

- During group introductions, when respondents are asked to identify their brand of maple syrup, Log Cabin, Aunt Jemima and Mrs. Butterworth are often mentioned
- Brand names of real maple syrup are not recalled or known, even among regular loyal maple syrup users
- Real maple syrup is commoditized and referred to as maple syrup while imitation maple syrup is referred to by brand name



Awareness & Usage

- Real maple syrup use includes the usual pancakes/waffles as well as cooking/recipes for basting/marinades, baked goods, cereals, ice cream, baked beans, squash, and many more
- Maple syrup is embraced by a few as a healthier alternative to sugar:
 - *“Trying to switch to clean eating, avoiding big name brands, using maple syrup as a sweetener, in cooking and replacing sugar” Pittsburgh Medium User*
- Maple syrup is recognized by a few as containing beneficial ingredients such as magnesium and other vitamins and minerals



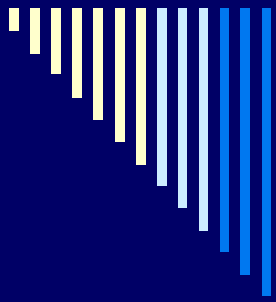
Attitudes & Usage: Maple-Flavored Syrups

- Maple-flavored syrups are rejected by maple syrup loyal users as unhealthy, poor tasting, processed, imitation
- Dual or sole users of maple-flavored products may believe these syrups contain amounts of real maple syrup and express surprise upon learning they are made wholly from corn syrup
- Maple-flavored syrup users may acknowledge this fact on a rational level, yet superficially and emotionally continue to view Log Cabin, Aunt Jemima and Mrs. Butterworth as maple syrup because they grew up with them from childhood. The product heritage contributes to the fact that these brands represent maple syrup to some users



Attitudes & Usage: Maple-Flavored Syrups

- Maple-flavored syrups are used more often for everyday breakfasts on pancakes/waffles, especially if kids are in the household
- Participants say kids tend to “douse” or “drench” pancakes and real maple syrup is too expensive for daily use:
 - *“Kids don’t appreciate real maple syrup, waste it”
Philadelphia Heavy User*



Maple Syrup Sources



Sources of Maple Syrup

- Most participants are unaware of the source of the maple syrup they currently buy or the origin of maple syrup sold at area retailers
- A few say they check or may happen to notice labels with country of origin, but usually do not make a point to look
- Canada and the Northeast US are named as primary sources of maple syrup
- Participants believe that these are the sources of the maple syrup they buy
- Pennsylvania is mentioned by a few in each group
- Vermont is virtually synonymous with maple syrup
- Other states mentioned as maple syrup sources - - Maine, New York, New Hampshire, Connecticut, Massachusetts



Sources of Maple Syrup

- Awareness of Pennsylvania maple syrup is low, especially in comparison to other states
- Many are surprised to learn that Pennsylvania even produces maple syrup:
 - *“They’re not doing a very good job of telling people about it” Philadelphia Medium User*
- The few participants who are aware of Pennsylvania maple syrup say it can be difficult to find unless they go to Farmer’s Markets or local stores such as Stauffer’s:
 - *“When I want a gift of Pennsylvania maple syrup I have to search it out at Stauffer’s. It’s more difficult to find it than it should be” Lancaster/Lititz Heavy User*



Concept of Local

- The notion of locally sourced products is appealing to many participants who say they want to “buy local” and make an effort to buy local to support the local economy, etc.
- For some, the term “local” means no more than 1-2 hours or a few hundred miles from where they live
- Attitudinally, similarities and differences emerge relative to the concept of “local”
- In all markets, the state of Pennsylvania seems a bit broad and physically large to connote and represent a locally sourced product such as maple syrup:
 - *“Pennsylvania doesn’t sound like Vermont. Too big a state” Philadelphia Medium User*



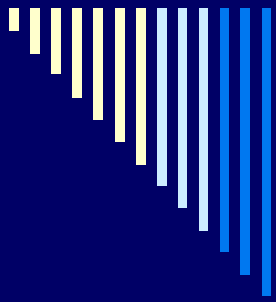
Concept of Local

- Pittsburgh participants consider local to mean nearby counties (Beaver, Somerset, etc.) and Western Pennsylvania. Some have awareness of maple syrup production in these areas. However, Lancaster County is also mentioned as having “local” connotations and farm-like/rural imagery, despite its distance
- Philadelphia respondents would not expect local maple syrup to be from the greater Philadelphia area, but more likely from Lancaster, Western Pennsylvania or “upstate”
- In Lancaster/Lititz, “local” is Lancaster County. Participants are accustomed to buying local produce, meats, etc. Local maple syrup is expected here



Concept of Local

- Lancaster County is embraced by all three markets as a familiar and reliable source of locally-grown products
- An agricultural and Amish heritage and imagery support Lancaster County as an expected and credible source of Pennsylvania maple syrup
- Reactions to and perceptions of “local” suggest opportunities for more specific labeling of Pennsylvania maple syrup - - e.g.
- Lancaster County, Somerset County, Lackawanna County and others in Western and upstate Pennsylvania are mentioned



Maple Syrup Usage/Cookery



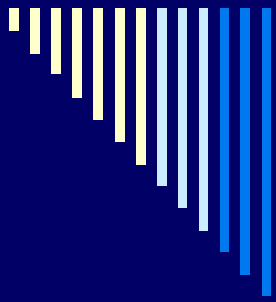
Usage/Cookery

- Real maple syrup - - frequently used in recipes, including smoothies, basting/BBQ sauces, baked goods (muffins, breads), sweet potatoes, baked beans, cocktails, and much more
- Real maple syrup is considered essential for recipes and in cooking:
 - *“Can taste the difference. Important to have the richness of real maple syrup” Pittsburgh Medium User*
- Maple-flavored syrup - - rejected for use in recipes due to concerns the recipe will fail or not taste good:
 - *“Maple-flavored syrup takes away from the other ingredients” Philadelphia Heavy User*



Usage/Cookery

- Participants in all groups/segments express interest in learning about new ways to use maple syrup in cooking and recipes
- During group discussion, participants indicate that hearing how others use maple syrup in foods/recipes inspires them to want to seek out new uses/ideas for maple syrup
- Sources of information about maple syrup use, recipes and products include: word-of-mouth (family, friends, neighbors), internet (food/cooking websites), local newspapers, cookbooks, TV (Food Channel), etc.



Selection & Purchase



Selection & Purchase Factors

- Selecting and buying maple syrup is relatively simple and straightforward - - influenced by habit, price, what is available on store shelves, amount and type of personal/household usage
- Little thought or label reading contributes to selecting maple syrup beyond ascertaining that it is “real”, “genuine” or “100%”. This messaging provides adequate assurance it is not corn syrup
- Purchase location - - most regularly and usually purchase maple syrup at supermarkets such as Giant, Acme, Stauffer’s or retailers such as Wal-Mart, Costco, Sam’s Club, Aldi, Trader Joe’s and others specialty stores
- Some occasionally buy maple syrup at Farmer’s Markets
- In Lititz/Lancaster/Pittsburgh a greater number of maple syrup users buy at farmer’s markets. A few maple syrup loyals purchase regularly from Farmer’s Markets and may have a relationship with the seller/farmer/grower

Selection & Purchase Factors

- Packaging - - not really a meaningful purchase influencer. Glass, plastic, metal are all familiar and accepted. Individual preferences are expressed for plastic jug for large amounts (lighter, no-break), glass for purity or novelty (leaf-shape)
- Price is a driving factor. In supermarkets, most tend to buy the cheapest maple syrup, often the store brand, which is considered fully acceptable, an attitude typical of a commodity product
- There seems to be less price-consciousness when purchasing at Farmer's Markets as there is usually no choice and the seller may be the farmer/grower
- Price is often an indicator of authenticity. A higher price signals that it is real maple syrup:
 - *"I know if it's cheap, it's not real" Lancaster/Lititz Heavy User*



Selection & Purchase Factors

- ❑ Sell-by/expiration date - - most do not bother looking for a sell-by or expiration date
- ❑ Maple syrup is believed to have an almost indefinite shelf life, especially if refrigerated
- ❑ Most say they trust their stores to stock what is sellable/usable and have never experienced problems with maple syrup being spoiled or “going bad”
- ❑ Relative to spoilage, not all refrigerate maple syrup after opening or know if refrigeration is indicated or necessary
- ❑ Some say refrigeration makes maple syrup too thick
- ❑ Others do not believe maple syrup needs refrigeration, based on past usage experience



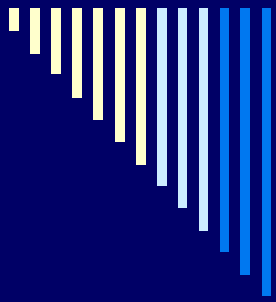
Selection & Purchase Factors

- Brand name - - branding is not really a factor or influencer in maple syrup purchase. There is no awareness or recall of independent maple syrup brands, although store brands, including Great Value, Costco, Giant, are mentioned
- Organic - - of interest and sought by only a few. Not a priority in maple syrup. Some believe maple syrup is inherently organic as it comes from within trees:
 - *“Maple syrup is organic by nature” Philadelphia Medium User*
 - *“How could maple syrup not be organic?” Pittsburgh Medium User*



Selection & Purchase Factors

- Maple syrup grades and colors - - knowledge of color and grading systems is sketchy and unclear. Maple syrup users may recall seeing grades A or B and terms such as light, dark or amber, but these do not factor into maple syrup selection and purchase
- Maple syrup is regarded as a commodity, like honey. Similar to other commoditized products maple syrup does not, in the consumers' minds, possess identifiable and tangible features and attributes that contribute to product comparison in the selection process:
 - *“Maple syrup is maple syrup” Pittsburgh Heavy User*



User Segments



User Segments

- Two different target consumer segments, based on usage frequency, participated in this research - - heavy and medium users
- Both user segments are potentially targets for Pennsylvania maple syrup, but may require different approaches and levels of effort



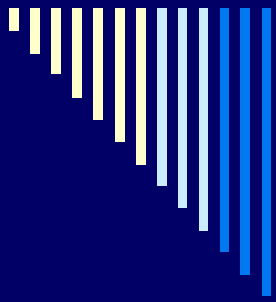
User Segments

- Heavy Users purchase and consume a greater amount of maple syrup on a regular basis, tend to be food enthusiasts, health/fitness motivated, committed to and interested in seeking locally sourced food products, value them and are willing to pay more
- A few heavy users purchase Pennsylvania maple syrup at Farmer's Markets (Pittsburgh/Lancaster/Lititz)
- Targeting and capturing greater numbers in this segment may be a simple matter of increasing awareness and availability of PA maple syrup
- The heavy user segment is more likely to be predisposed to gravitate toward benefits and advantages of PA maple syrup once they learn of its existence



User Segments

- Medium Users consume maple syrup to a lesser degree, are more inconsistently food-involved, not as proactive relative to local produce and less likely to seek out PA maple syrup. Increasing usage among Medium Users may require greater efforts to raise awareness and communicate motivating benefits
- Geographically - - differences emerge in the markets
 - Philadelphia - - lower involvement with, awareness of and commitment to locally sourced foods,
 - Pittsburgh and Lancaster County/Lititz are more similar - - both areas voice greater expectations for Pennsylvania maple syrup to be locally sourced as they are accustomed to buying local and have some awareness of maple syrup production nearby



PA Maple Syrup Ideas and Suggestions



Participants' Ideas for PA Maple Syrup

- At the conclusion of group discussion in each market, respondents were asked to jot down ideas and suggestions for potential products incorporating Pennsylvania maple syrup and/or partnering with compatible products and brands
- Ideas/suggestions are similar across groups/segments and include:
 - Maple spreads - - maple butter, maple cream, maple cream cheese, maple cheese
 - Maple milk, maple coffee creamer, maple ice cream, maple yogurt - - partner with local dairies
 - Maple coffee, maple tea
 - Maple dipping sauces/salsas (maple-mango) for vegetables, fries/sweet potato fries, etc.
 - Maple ketchup, maple mustard, maple balsamic vinegar, maple BBQ sauce



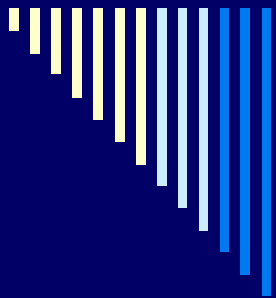
Participants' Ideas for PA Maple Syrup

- Maple popcorn - - also pretzels, nuts, chips - - partner with PA snack companies such as Utz, Snyder, Herr's
- Maple beer, stout, ale, bourbon, vodka - - partner with PA breweries/distilleries
- Maple meats - - bacon, ham, beef jerky, sausage, scrapple, hot dogs - - partner with PA meat companies
- Maple baked goods - - cakes, donuts, cookies, breads, pies, scones, biscotti, muffins, etc. - - partner with PA bakers (Tastycake, etc.)
- Maple cotton candy - - partner with state and local fairs
- Maple pudding
- Maple soft pretzels - - partner with Auntie Ann's
- Maple cocktail mix, maple soda, maple water, maple birch beer
- Maple throat lozenges, maple candy, maple gum, maple fudge



Participants' Ideas for PA Maple Syrup

- In addition to specific foods and recipes respondents suggest:
 - A conversion table showing how to substitute maple syrup for sugar and other sweeteners
 - Personal care products - - maple toothpaste, maple mouthwash, maple soap, maple shampoo, maple chap stick/lip balm
 - Maple tobacco, hookah and vaping flavors



Next Steps Recommendations



Next Steps - Recommendations

- Increase shelf space in grocery stores to include areas in the store that would fit maple syrup usage
 - Sweetener
 - Condiments
 - Baking Aisle
 - Meat/Poultry section.

When visiting stores around the state other flavored products were in multiple sections of the store.



Next Steps - Recommendations

- Work with local headquarter stores, like Giant Eagle or Weis to use local maple syrup in their store brand. Currently the labels state from Canada or New York
- Partner with PA headquarter snack food, diary meat producers to use PA Maple Syrup in their products. (Utz, Hormel, Herr's)

This products could be marketed as PA Preferred or labeled in grocery aisles as locally sourced.



Next Steps - Recommendations

- In-store tasting with recipes using PA maple syrup
 - If consumers can taste the product used in recipes they tend to purchase the product.
 - To convert Log Cabin and other processed maple syrup users real maple syrup usage “Proof is in the tasting”
 - Strategically place recipes with ingredients for a specific recipe. – baking, meats and fish and dairy products.



Next Steps - Recommendations

- Retailers that carry and showcase products made in PA.
 - Airports in PA have stores with PA made and produced products. There was no maple syrup in Phila. or Pitts. airport shops.
 - Smaller local retailer or specialty food stores – right now most purchased in farmer markets or farm stands.



Next Steps - Recommendations

□ Marketing Campaign

- Informing consumers to the benefits of maple syrup.
- The back story about the maple industry. Map of where produced in PA .
- Marketing not just for “pancakes or waffles”
- Promote tours or educational events about maple industry. Many of the participants remember going on a field trip to a maple producer farm. They were not sure if they still existed.
- Use of social media or bill boards



Next Steps - Recommendations

- Business Development or Marketing Manager
 - If your budget or new grant allows the association to hire an individual to improve shelf space in store, educate consumers on the many usages of maple syrup and schedule in-store events across the state to increase awareness and product purchase the associates would see and increase in demand



Next Steps - Recommendations

- Work with manufacturers product innovation teams to products using PA maple syrup. Line extension for current products.
 - Dad Hat Bourbon
 - Hatfield Meats
 - Herr's Snack Food
 - Hershey's confection and snack products
 - WAWA private label products – ice cream, coffee creamers and cream cheese



Final Steps

Schedule a meeting with Strasser and Associates to review findings and next steps

- provide opportunity for association to ask more questions.
- Discuss next steps

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