



Survey: Single Use Plastic Packaging in Canada's Produce Industry

Single use plastics (SUP), or viable alternatives, are vital to maintaining an effective and efficient global produce industry. To assist CPMA's work with its members to determine a path forward to address the use of plastics within the produce sector and the best practices necessary to reduce the environmental impact of SUP on our world, Value Chain Management International (VCM) is conducting a landscape review and analysis.

Industry and governments are at a critical juncture in the development of SUP regulations. Federal and provincial/territorial governments are asking for CPMA's input. By completing this survey you will enable CPMA to provide accurate information that informs government policies and ensures the minimized impact of regulatory burden in Canada. You will also support CPMA's goal of harmonizing regulations between trading partners.

The following survey on SUP and alternative packaging materials should take no longer than ten minutes to complete. If you wish to review the questions before completing the survey, the questions can be previewed here. **Please ensure that you complete this online survey before Monday, August 12.**

All of the information provided will be treated with the strictest confidentiality. We are not seeking the names of people, businesses or organizations.

If you have questions about the study please contact Martin Gooch +1 416-997-7779 or martin@vcm-international.com.

We thank you in advance for your cooperation.

Regards,
Martin Gooch, PhD

Q1. Please indicate which of the following best describes your core business.

- Grower (open field)
- Greenhouse grower
- Grading/packing
- Further process (e.g. bagged salads, pre-cut veg) – ***if yes, skip to Q3***
- Wholesaler/distributor (primarily retail)
- Wholesaler/distributor (primarily foodservice)
- Retail – ***if yes, skip to Q3***

Q2. Do you further process your products prior to sale (e.g. bagged salads, pre-cut vegetables, etc.)?

- Yes
- No

Q3. In which countries are your operations located? Please indicate all that apply.

- Argentina
- Belgium
- Canada
- China
- Egypt
- Spain
- Greece
- Honduras
- Israel
- Italy
- Morocco
- Mexico
- Netherlands
- United Kingdom
- United States
- South Africa
- Other

Q4. In which state or province are your primary headquarters and/or primary operations located?

Q5. Please indicate which markets your business serves. *Please choose one answer.*

- International
- National/domestic

Q6. For each of the items that you handle, listed in the table below, please indicate the estimated annual sales in metric tonnes. *Please ignore any items that are not relevant to your business.*

Potatoes	
Citrus fruit (incl. oranges, limes, mandarins, grapefruit, lemons)	
Leafy greens (incl. lettuce, kale, spinach, bagged salads)	
Apples	
Onions and shallots	
Tomatoes	
Carrots	
Soft berries (incl. strawberries, blueberries, raspberries, blackberries)	
Grapes	
Peppers	
Cucumbers	
Celery	
Broccoli	
Soft fruit (incl. peaches, plums, apricots, nectarines)	
Mushrooms	
Pears	
Cherries	
Beets	
Beans (green and wax)	
Kiwis	
Other commodities	

Q7. For each of the items that you handle, listed in the table below, **please indicate the estimated percentage increase in loss above current levels that would be caused by SUP packaging not being available or allowed.** *Please ignore any items that are not relevant to your business.*

Potatoes	
Citrus fruit (incl. oranges, limes, mandarins, grapefruit, lemons)	
Leafy greens (incl. lettuce, kale, spinach, bagged salads)	
Apples	
Onions and shallots	
Tomatoes	
Carrots	
Soft berries (incl. strawberries, blueberries, raspberries, blackberries)	
Grapes	
Peppers	
Cucumbers	
Celery	
Broccoli	
Soft fruit (incl. peaches, plums, apricots, nectarines)	
Mushrooms	
Pears	
Cherries	
Beets	
Beans (green and wax)	
Kiwis	
Other commodities	

Q8. For each of the items that you handle, listed in the table below, please tick a) if you would have to stop selling due to SUP not being available or allowed, **OR** tick b) if you could have to sell seasonally rather than year round if SUP not being available or allowed. *Please ignore any items that are not relevant to your business.*

Commodity	a) You would have to stop selling if no SUP available/allowed	b) You would continue selling but seasonally rather than year round
Potatoes		
Citrus fruit (incl. oranges, limes, mandarins, grapefruit, lemons)		
Leafy greens (incl. lettuce, kale, spinach, bagged salads)		
Apples		
Onions and shallots		
Tomatoes		
Carrots		
Soft berries (incl. strawberries, blueberries, raspberries, blackberries)		
Grapes		
Peppers		
Cucumbers		
Celery		
Broccoli		
Soft fruit (incl. peaches, plums, apricots, nectarines)		
Mushrooms		
Pears		
Cherries		
Beets		
Beans (green and wax)		
Kiwis		
Other commodities		

Q9. For each of the SUP packaging material types listed below, please identify if you use them and, if yes, what is the estimated percentage that this type of packaging contributes to your overall SUP usage?

	Yes, use	No, do not use	If yes, what is the % of overall SUP usage
PVC & polystyrene			
Oxy degradable materials			
Rigid water soluble plastic			
PLA – polylactic acid			
Industrial compostable			
Polycarbonate			
Acrylic			
Black or dark coloured plastics			
Home compostable (e.g. cellulose, Mater-Bi)			
OPP – oriented polypropylene			
PP – polypropylene			
Complex or multi-layered laminates / films			
PVdC - polyvinylidene chloride			
PET – polyethylene terephthalate			
HDPE – high-density polyethylene			
LDPE – low-density polyethylene			
PE – polyethylene			

Q10. For each of the SUP packaging material types listed below, please identify if you are planning to transition away from their use, or transition into their use? *Please ignore any items that are not relevant to your business.*

Material	Plan to transition away from use	Plan to transition into use	Maintain current level of use
PVC & polystyrene			
Oxy degradable materials			
Rigid water soluble plastic			
PLA – polylactic acid			
Industrial compostable			
Polycarbonate			
Acrylic			
Black or dark coloured plastics			
Home compostable (e.g. cellulose, Mater-Bi)			
OPP – oriented polypropylene			
PP – polypropylene			
Complex or multi-layered laminates / films			
PVdC - polyvinylidene chloride			
PET – polyethylene terephthalate			
HDPE – high-density polyethylene			
LDPE – low-density polyethylene			
PE – polyethylene			

Q.11 Please indicate the timing of any intended replacements identified above.

- 2019
- 2020
- 2021
- Before 2025
- 2026 or later

Q12. What impact are each of the factors listed below having on CPMA members' ability to minimize the environmental impact of SUP in Canada? Please identify their impact on a scale of 1 to 5 (1 = minimal impact; 3 = moderate impact; 5 = significant impact).

Lack of recycling infrastructure	
Lack of public awareness and/or knowledge	
Inconsistent provincial or municipal regulations	
Inconsistent provincial or municipal recycling programs	
Inconsistent provincial or municipal composting programs	
Lack of international standardization of SUP materials	
Politicization of SUP packaging	
Lack of guidance on material choices	
Other (please specify)	

Transitioning to New SUP and Alternative (non-SUP) Packaging Materials

Q13. Does an identifiable SUP exist that is a) more recyclable or compostable than the SUP presently used by your business, or b) an alternative material that is not SUP?

- Yes
- No – *if no, skip to Q17*

Q14. What impact are each of the drivers listed below having on your business's desire to transition to new packaging materials – whether more recyclable or compostable SUP, or alternative materials? Please identify their impact on a scale of 1 to 5 (1 = minimal impact; 3 = moderate impact; 5 = significant impact).

Impending SUP regulations	
Consumer feedback	
Customer demands	
Corporate social responsibility	
Environmental sustainability	
Cost reduction	
Competitive advantage	
Export opportunities/markets	
Other (please specify)	

Q15. For each of the factors listed below, using a scale of 1 to 5 (1 = minimal difference; 3 = moderate difference; 5 = significant difference), please indicate the comparative effectiveness of current packaging versus replacement SUP or non-SUP materials:

Factor	Effectiveness of current SUP	Effectiveness of replacement SUP or alternative materials
Food safety assurance		
Quality assurance		
Maximizing shelf life		
Cost-effective transportation		
Damage protection		
Convenience (e.g. re-sealable)		
Consumer messaging		
Marketing (design / aesthetics)		
Unique product ID (traceability)		
Food preparation (e.g. microwave ready)		
Overall cost effectiveness		

Q16. By approximately how much would transitioning to replacement SUP or alternative packaging materials increase your costs of doing business? (*Costs of doing business include research and development, cost of production, waste, energy, purchasing new equipment, cost of materials, marketing, labour, training, etc.*)

- Less than 10%
- 11 – 25%
- 26 – 50%
- 51 – 75%
- 76 – 100%
- More than 100%

Q17. Thank you for participating in this important study. Is there anything further that you would like to add about SUP packaging in the context of the Canadian produce industry?