



# Perceptions of Eliminating Plastic Packaging from Fresh Produce

Canadian Produce Marketing Association (CPMA)

October 2023

# Methodology

- Sample size: 1,500 adult Canadians.
- Survey field dates: October 16 – 22, 2023.
- The data was weighted by age, gender, education and region.
- Totals may not add up to 100 due to rounding.
- The margin of error for a comparable probability-based random sample of the same size is +/- 2.6%, 19 times out of 20.



# Key Insights



# Key Insights – Consumer Preferences



The Canadian electorate's primary focus is undeniably centered on the increasing cost of living, with a substantial 73% ranking it within their top three concerns, while only 26% prioritize climate change and environmental issues to the same degree. When evaluating political parties based on their perceived competence in addressing cost of living challenges, the Liberals significantly lag behind the Conservatives, trailing by a substantial 17-point margin (34% to 17%) among those who consider this issue their utmost priority.



The survey results have revealed a significant shift in consumer preferences, with more than two-thirds of Canadian consumers (69%) now giving priority to affordability over quality and taste (31%). This marks a significant 10-point increase from 2019 when only 59% of consumers leaned towards price rather than quality. Furthermore, when presented with a choice, two-thirds of consumers emphasize the importance of affordability for fresh produce (67%), overshadowing the reduction in plastic usage (33%). This shift in consumer sentiment holds significant implications, particularly when considering that 62% of Canadian consumers express concerns about the potential price consequences for fresh fruits and vegetables if the government successfully attains its goal of reducing plastic packaging for produce by 95%.



The findings indicate that 3 out of 5 Canadians generally pay less attention to the packaging of produce when shopping, while 2 out of 5 actively seek products that avoid plastic or other single-use packaging. This reflects a change from 2019 when almost 1 in 2 consumers expressed concerns about the packaging of produce. The declining trend in avoiding plastic-packaged produce may be a direct consequence of the increasing cost of living, where immediate economic worries take precedence over longer-term environmental considerations.



The majority of Canadian consumers, accounting for nearly two-thirds of them, emphasize that product quality and cost take precedence over the distinction between local and imported produce.. It's noteworthy that this figure has increased by 5% since 2019 when 43% of Canadian consumers actively sought locally grown produce, even if it came at a slightly higher price point. These findings highlight how the current economic conditions have shaped Canadian priorities, with affordability taking precedence over factors that were once more important to them.

# Key Insights – Perceptions of Plastic Packaging



## VARIED OPINIONS REGARDING PLASTIC PACKAGING

Canadians exhibit a diverse range of perspectives when it comes to plastics. A substantial 55% emphasize the reduction of plastic use, with 17% advocating for its complete elimination, and 38% supporting recyclable alternatives when suitable. However, when asked about their top priorities, only 1 in 5 Canadians give precedence to a broad reduction in plastic usage. In contrast, two in five are more inclined to reduce single-use and unrecyclable plastics, while one in three places a higher focus on minimizing the environmental impact of packaging. These findings illustrate that, while there's a general consensus on the importance of mitigating environmental impact, the specific approaches and the extent of these changes continue to be subjects of ongoing discussion and deliberation.



## CAN ACHIEVE THE SAME OUTCOME WITHOUT PLASTIC

When given a range of reasons for the use of plastic packaging, such as enhancing product presentation, preventing food spoilage, extending shelf life, and offering lighter and more cost-effective transportation, the findings show that almost two-thirds of Canadians believe these same objectives can be accomplished with alternative packaging materials. This suggests that Canadians may not have substantial concerns or a complete grasp of the consequences of transitioning from plastic packaging to alternative options in terms of factors such as product quality, accessibility, or transportation. Rather, their primary focus revolves around the economic repercussions and the affordability linked to such a shift.



## UNAWARE OF THE AMOUNT OF PACKAGING USED

A significant lack of awareness prevails among Canadians regarding the extent of plastic packaging used for fresh produce, as evidenced by the fact that 64% believe that less than 40% of fresh produce employs some form of plastic packaging. Moreover, when it comes to the plastic packaging used in the produce section, approximately half of Canadians perceive that most or all of it is recyclable. These findings suggest that Canadian consumers may not possess a comprehensive understanding of the recyclability of various packaging alternatives, which calls attention to the need for improved awareness and education on this critical issue.



## DO NOT SACRIFICE PLASTIC PACKAGING FOR OTHER NON-RECYCLABLE ALTERNATIVES

When asked about the more unfavorable scenario between eliminating single-use and non-recyclable plastics while retaining recyclable plastics and replacing plastic packaging with non-plastic alternatives that cannot be recycled, 54% of Canadian consumers expressed that the former option was less preferable. This implies that Canadians favor a situation where some non-recyclable plastics remain in use as long as recyclable alternatives are accessible, over a complete substitution of plastic packaging with non-plastic alternatives that lack recyclability.

# Key Insights – Perceptions of the Government Proposal



## AWARENESS OF THE GOVERNMENT'S PROPOSAL

The findings underscore a remarkable lack of awareness concerning the proposal to eliminate (at least) 95% of plastic packaging used for produce in grocery stores, with fewer than 1 in 3 Canadians acknowledging their knowledge of this initiative (29% aware). This situation presents a dual-edged sword for the government. On one hand, it affords the government a chance to craft the narrative and introduce the policy in a positive manner. On the other hand, it creates space for opposition or industry stakeholders to cast the proposal in a negative light, potentially eroding public support, especially when coupled with pre-existing concerns about feasibility and potential adverse repercussions.



## PRIORITIZATION OF CONCERNS

The findings indicate that 1 in 4 Canadian consumers strongly endorse the government's proposal to effectively eliminate plastic packaging from the produce sections in grocery stores, and an additional 27% view it as a 'good' idea. Nevertheless, there are clear and substantial concerns regarding the economic repercussions of these regulations. A noteworthy 62% anticipate a rise in fresh produce prices as a result of these measures. Worries also encompass an increase in food wastage (40%) and potential limitations in the variety and availability of produce (25%). These apprehensions, particularly in a context where public awareness of the regulations is already low, suggest potential challenges if these discussions are more widely publicized.



## PRODUCE SECTOR CAN SHAPE OPINIONS

Canadian sentiment largely aligns with several arguments presented by the fresh produce sector against the government's plan. Specifically, 89% of Canadians endorse the argument that the government should explore alternative solutions instead of imposing a complete ban on plastic packaging, while 80% support the notion that shifting away from plastic packaging could lead to higher costs. Additionally, 80% back the argument that the elimination of plastic packaging might result in increased food waste and spoilage. These findings underscore that, while some individuals may theoretically support the elimination of plastic packaging, the predominant focus remains on concerns related to cost, accessibility, and the longevity of products.



## SHIFTING SUPPORT HIGHLIGHTS THE FRAGILITY OF PUBLIC OPINION

Upon learning about industry reservations, such as increased production costs, increased waste and spoilage, and potential reduced availability, backing for the government proposal declines from 51% to 41%. This 10-point decrease in support for the policy when confronted with industry concerns highlights the precarious nature of public opinion. It implies that public support is conditional and susceptible to change with the introduction of new information or viewpoints. This volatility emphasizes the significance of proactive communication and continuous advocacy for the policy, ensuring that its perceived advantages and feasibility remain prominent in public discussions.

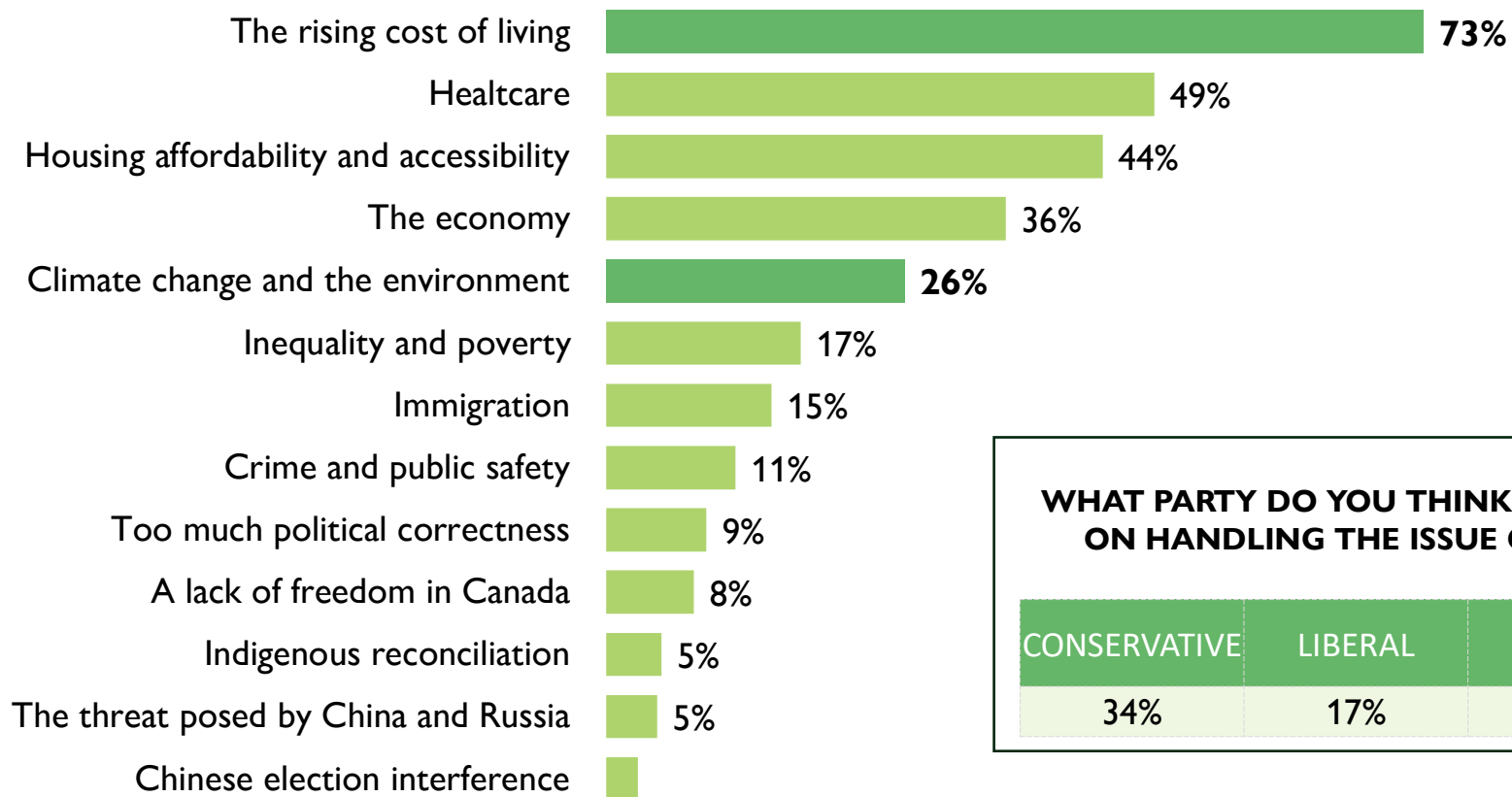
# Issues of Importance Today





If the federal government could focus on just three issues, which would you choose?

## Nearly 3 in 4 Canadians rate the cost of living as a top-three concern, while only 1 in 4 place climate change and environmental concerns at that level



### WHAT PARTY DO YOU THINK WOULD DO THE BEST ON HANDLING THE ISSUE OF COST OF LIVING?

CONSERVATIVE	LIBERAL	NDP	GREEN PARTY
34%	17%	16%	2%

Base: All (n=1,500)



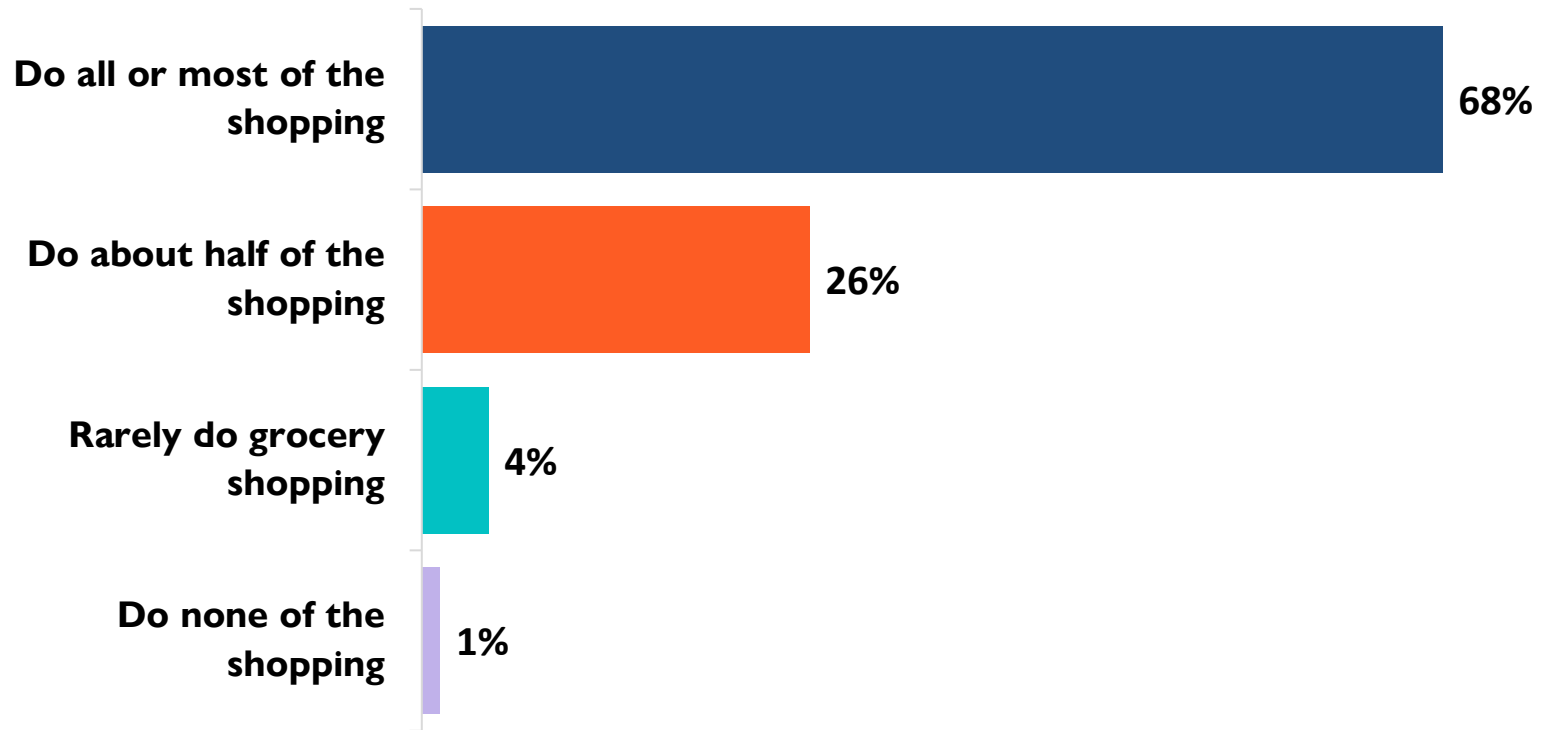
# Issues of Importance





When it comes to grocery shopping for your household, do you

## ROLE PLAYED IN GROCERY SHOPPING FOR THE HOUSEHOLD



Base: All (n=1,500)



In a typical week, how many meals do you eat?

In a typical week, how many meals that you eat are prepared at home?

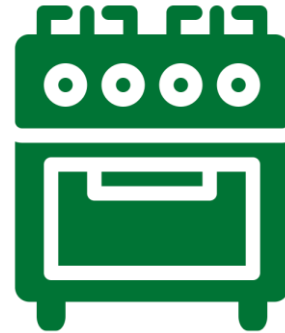
In a typical week, about how much do you spend buying fresh produce, like fruits and vegetables from a grocery store or market?

## AVERAGE MEALS CONSUMED IN A WEEK



**AVERAGE NUMBER OF  
MEALS CONSUMED IN  
A WEEK**

**16.8**



**AVERAGE NUMBER OF  
MEALS PREPARED AT  
HOME IN A WEEK**

**14.5**



**AVERAGE SPEND ON  
FRESH PRODUCE IN A  
WEEK**

**\$56.80**

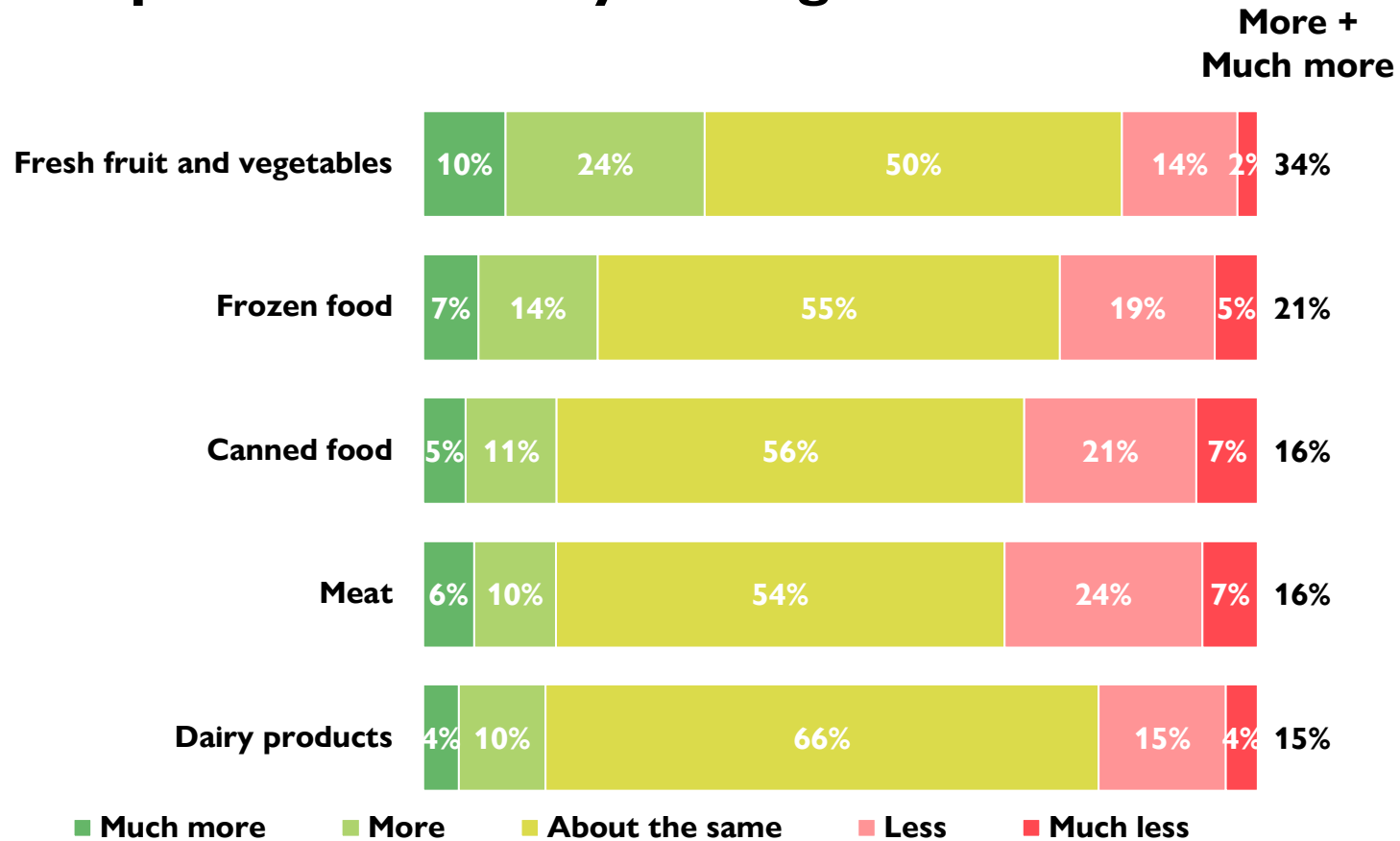
Base: All (n=1,500)

Note: Average spend on fresh produce excludes extreme outliers (i.e., average weekly spends of > \$200).



Compared with a two years ago, are you eating more, less or about the same amount of the following?

## One in three Canadians have increased their fruit and vegetable consumption compared with two years ago

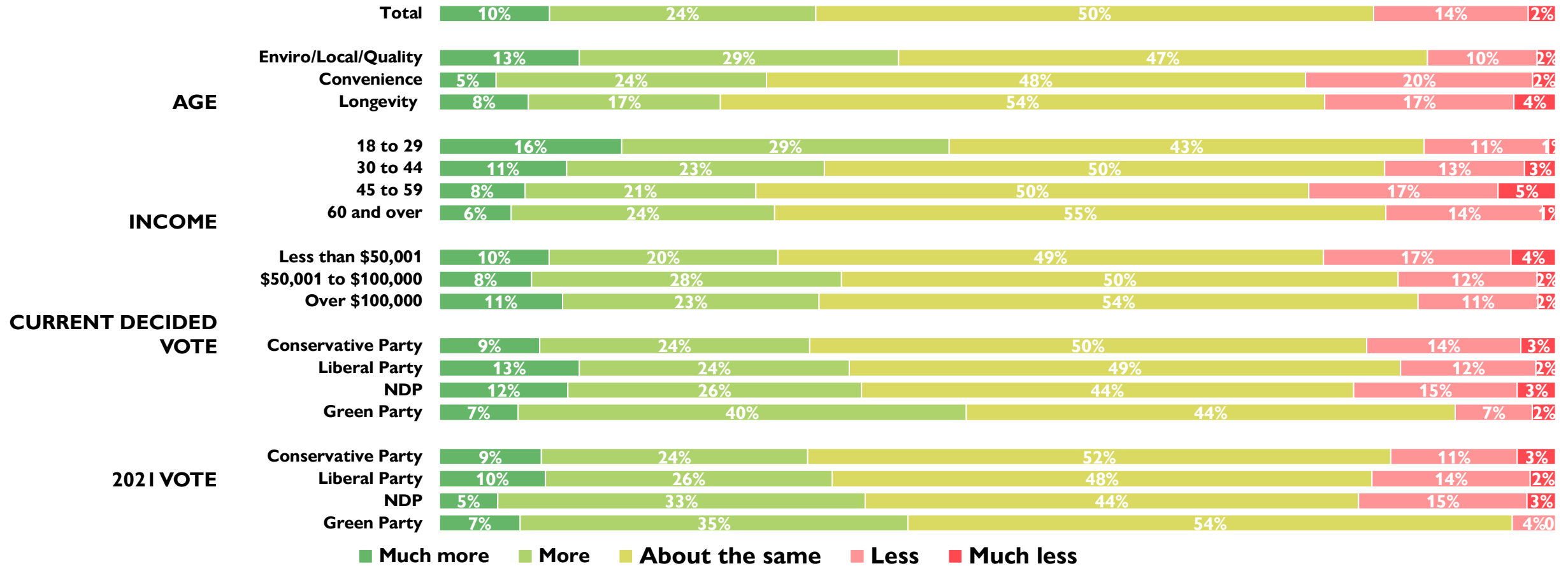


Base: All (n=1.500)



Compared with a two years ago, are you eating more, less or about the same amount of the following?

# CONSUMPTION OF FRUIT AND VEGETABLES COMPARED TO TWO YEARS AGO

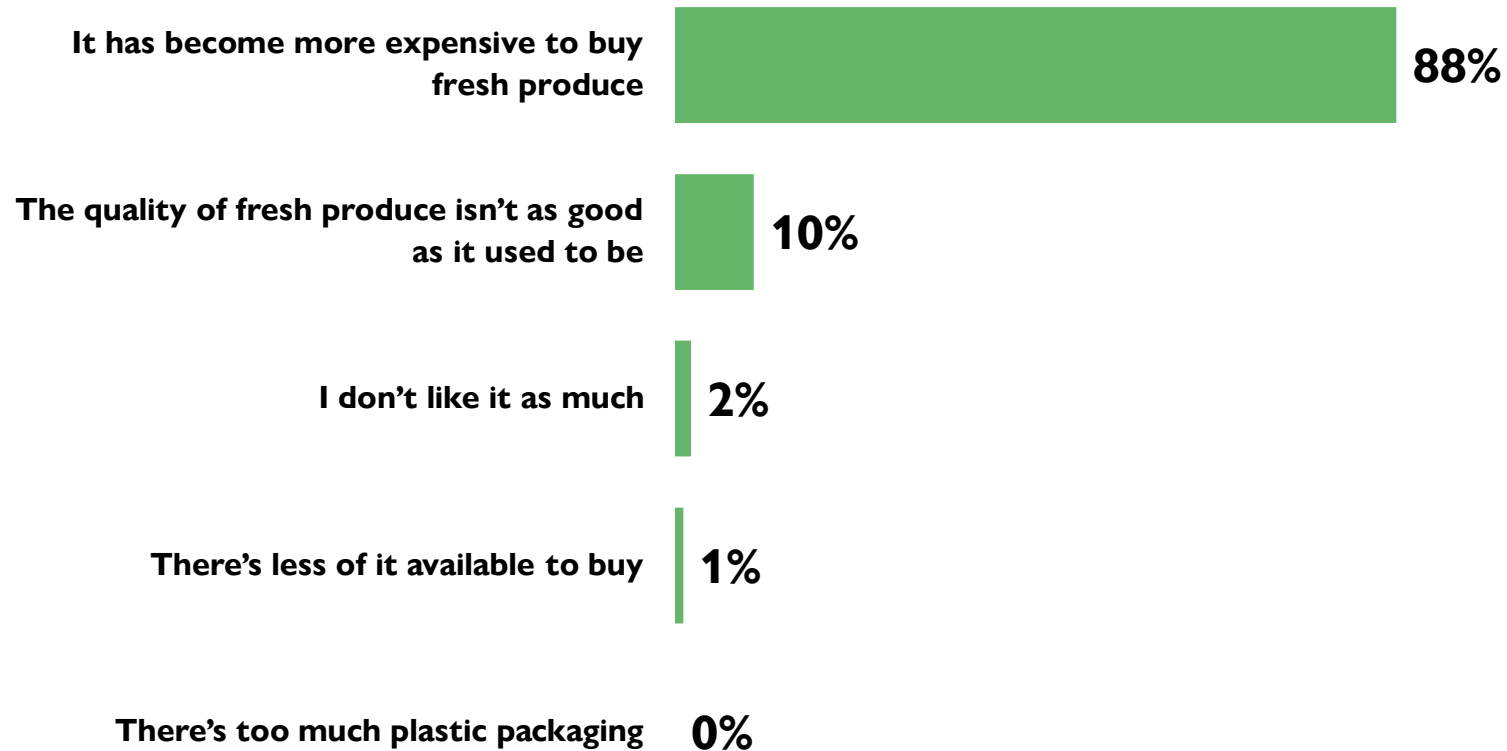


Base: All (n=1,500)



You said you are eating less fresh fruit and produce than you were 2 years ago, what's the primary reasons?

## Among those who have reduced their fresh fruit and produce consumption, nearly 9 in 10 note that it has become more expensive to buy fresh produce

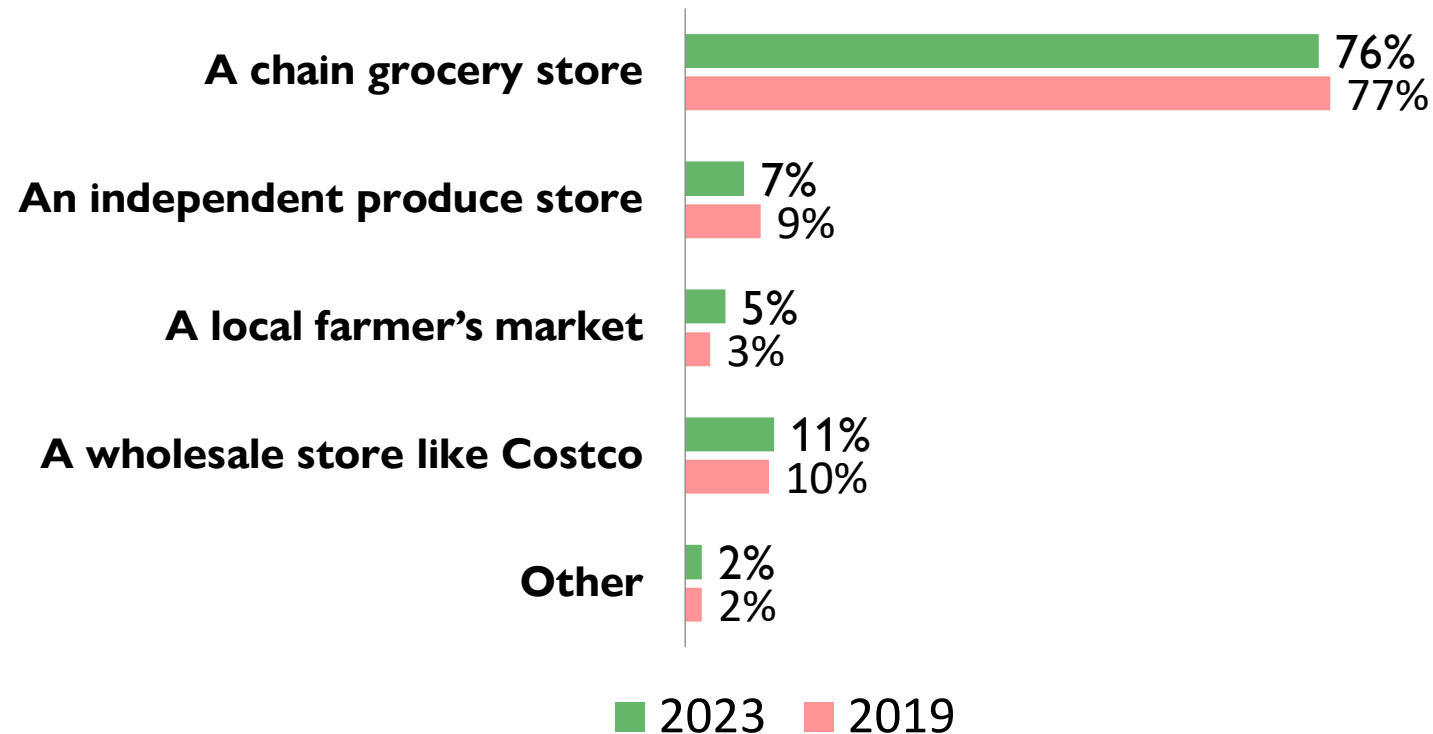


Base: Those who indicated they are eating less or much less fresh produce than 2 years ago (n=258)



Where do you typically buy most of your fresh fruits and vegetables?

## Three in four Canadians purchase their fresh fruits and vegetables from chain grocery stores



Base: All (n=1,500)

# Profiling the Produce Consumer Market





# CONSUMER SEGMENTATION

To better understand the link between consumer preferences and behaviour and views on single-use plastics, we conducted a **latent class segmentation** using responses to 5 questions.

The statistical model produced three unique segments.

**ENVIRO/LOCAL/QUALITY:** This is the largest consumer segment representing slightly more than half (53%) of the market. These consumers prefer to buy local produce, care more about quality, and are the most concerned about plastics.

**LONGEVITY:** This segment represents about one-third of the market. They care very little about local produce and admit that it doesn't play a roll in their consumer behaviour. Affordability is more important to them. They also don't concern themselves with the packaging their produce comes in.

**CONVENIENCE:** This segment also represents 18% of the market. They are more likely to buy pre-packaged produce products, most look for the more affordable product, and all of them say they don't really think about the amount of plastic used in the produce they purchase.

# PROFILING THE PRODUCE CONSUMER MARKET

## ENVIRO / LOCAL / QUALITY

**53%**

(+6 vs. 2019)

FREQUENT SHOPPING  
LOOK FOR LOCAL  
QUALITY OVER PRICE  
TRY TO AVOID PLASTICS

## CONVENIENCE

**18%**

(-8 vs. 2019)

PRE-PACKAGED  
PRICE OVER QUALITY  
DON'T THINK ABOUT  
PLASTICS

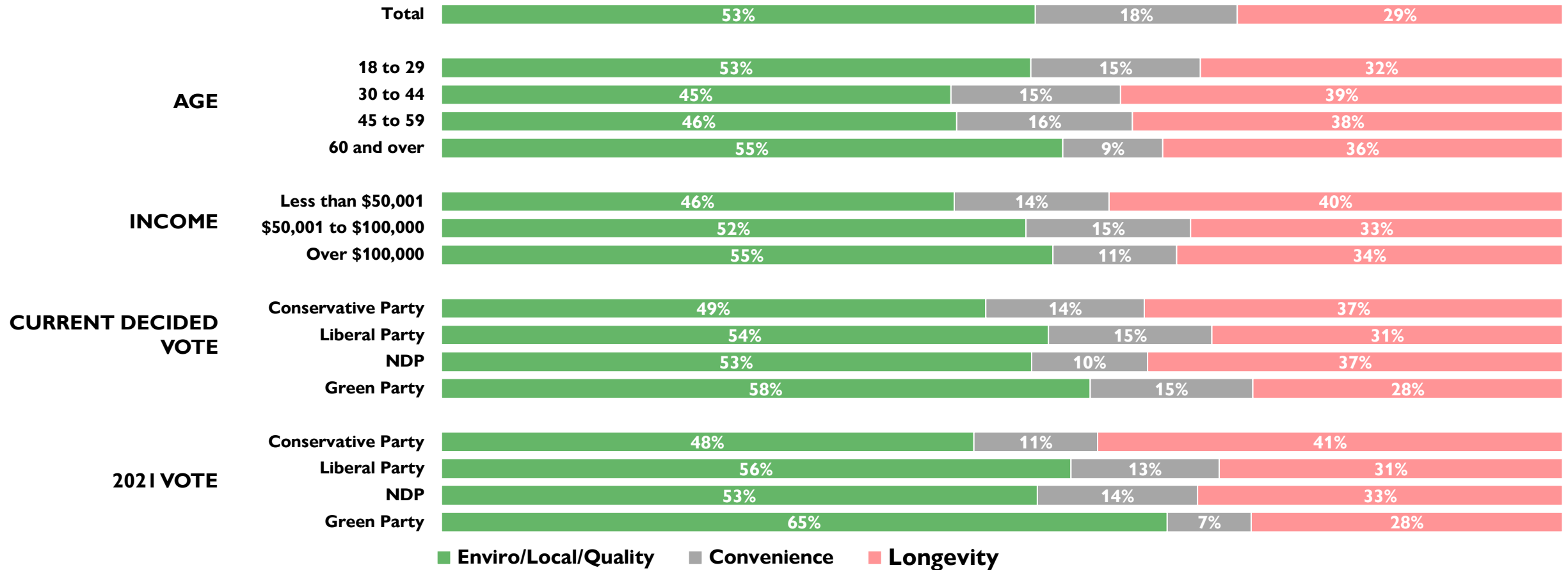
## LONGEVITY

**29%**

(+2 vs. 2019)

PRICE OVER QUALITY  
NOT PRE-PREPARED  
DON'T THINK ABOUT  
PLASTICS

# PROFILING THE PRODUCE CONSUMER MARKET

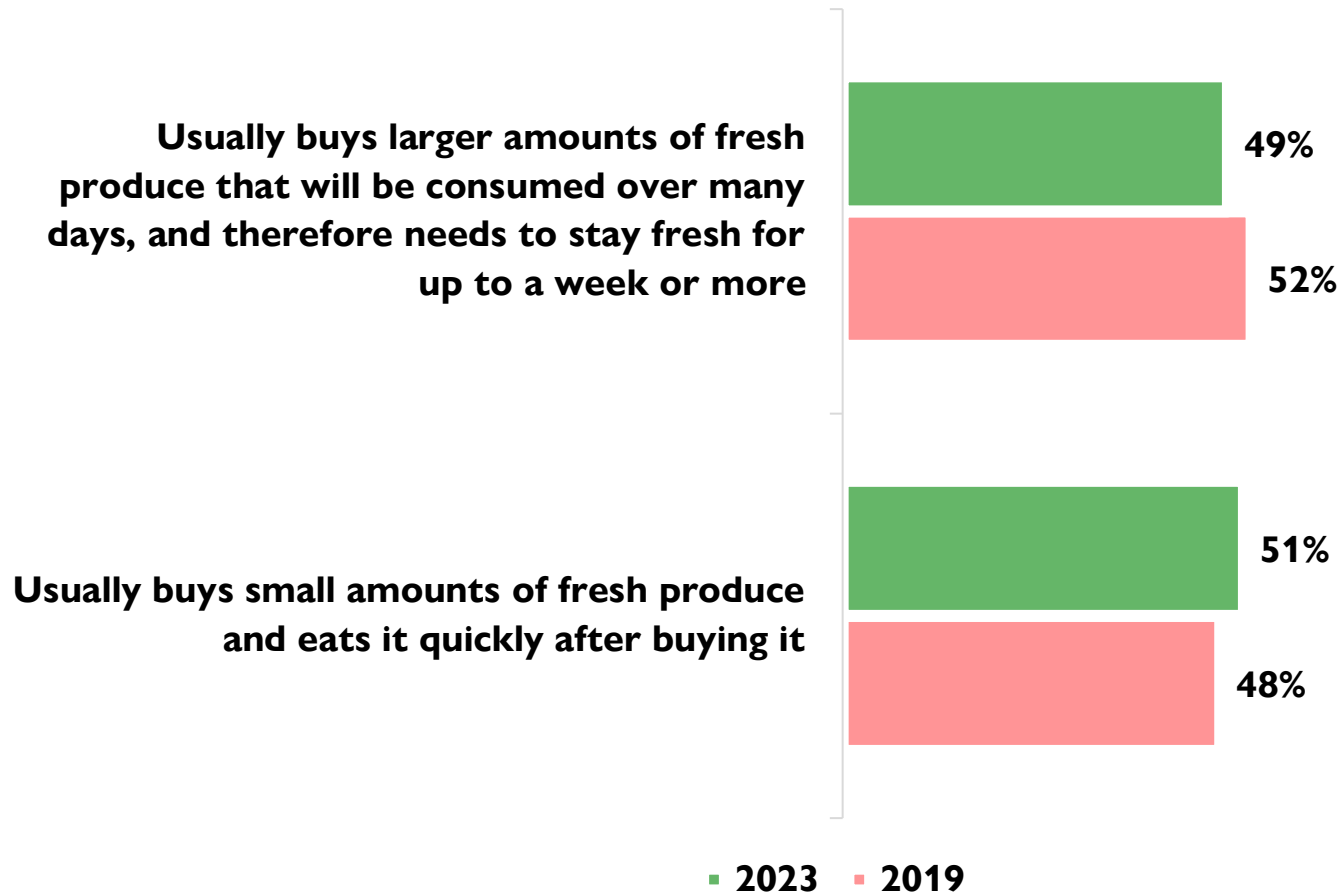


Base: All (n=1,500)



Are you someone who...

# LONGEVITY



The findings reveal that Canadians are divided when it comes to choosing between buying small quantities of produce for immediate consumption or opting for larger amounts of fresh produce to be consumed over several days.

Base: All (n=1,500)

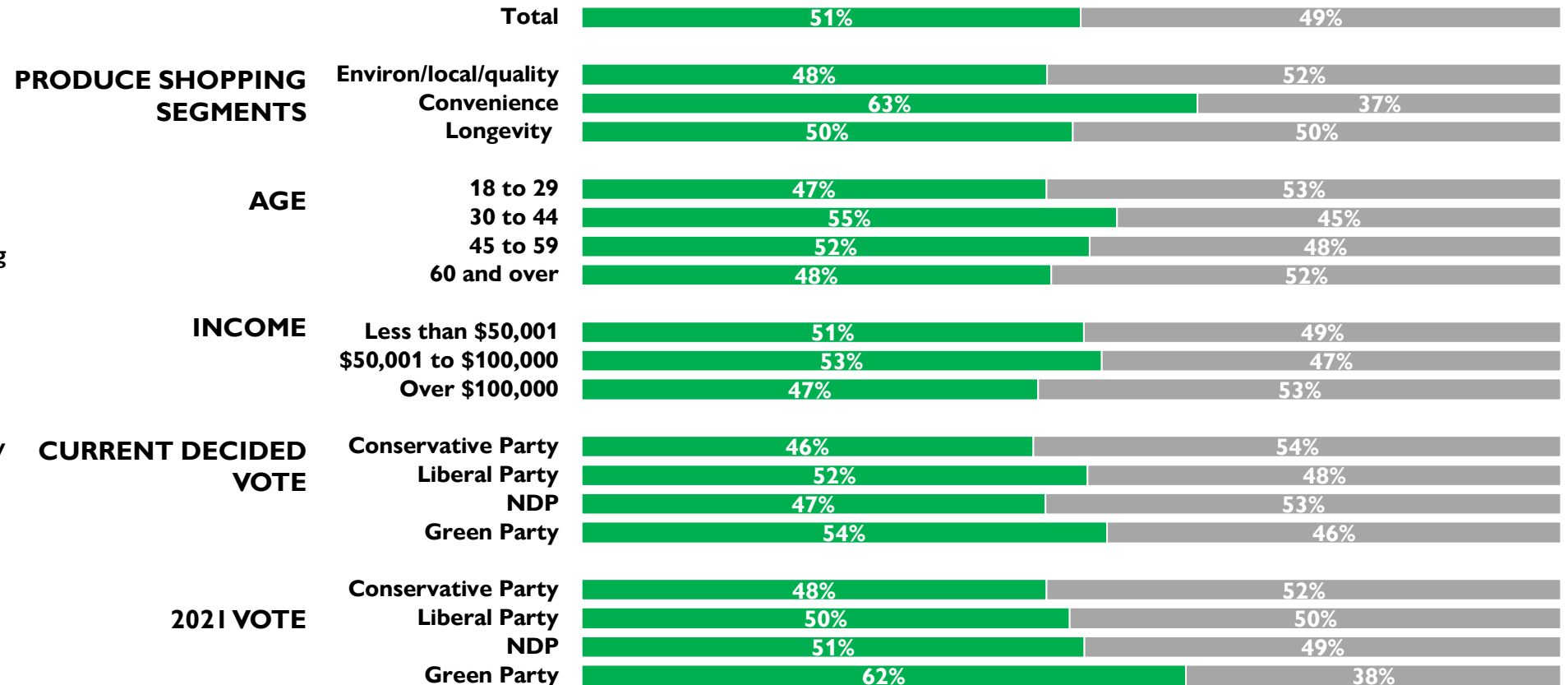


Are you someone who...

# LONGEVITY

■ Usually buys small amounts of fresh produce and eats it quickly after buying

■ Usually buys larger amounts of fresh produce that will be consumed over many days, and therefore needs to stay fresh for up to a week or more



Base: All (n=1,500)



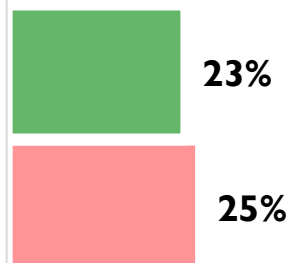
Are you someone who...

## CONVENIENCE

Likes to buy produce that has not been pre-prepared in any way, therefore requiring you to wash and prepare yourself



Likes to buy produce that is pre-washed and ready to eat (like a salad kit or pre-cut fruit)



■ 2023 ■ 2019

Consistent with the trends observed in 2019, an overwhelming three out of every four Canadians continue to place a higher priority on choosing unprepared produce as opposed to pre-washed and ready-to-eat options.

Base: All (n=1,500)

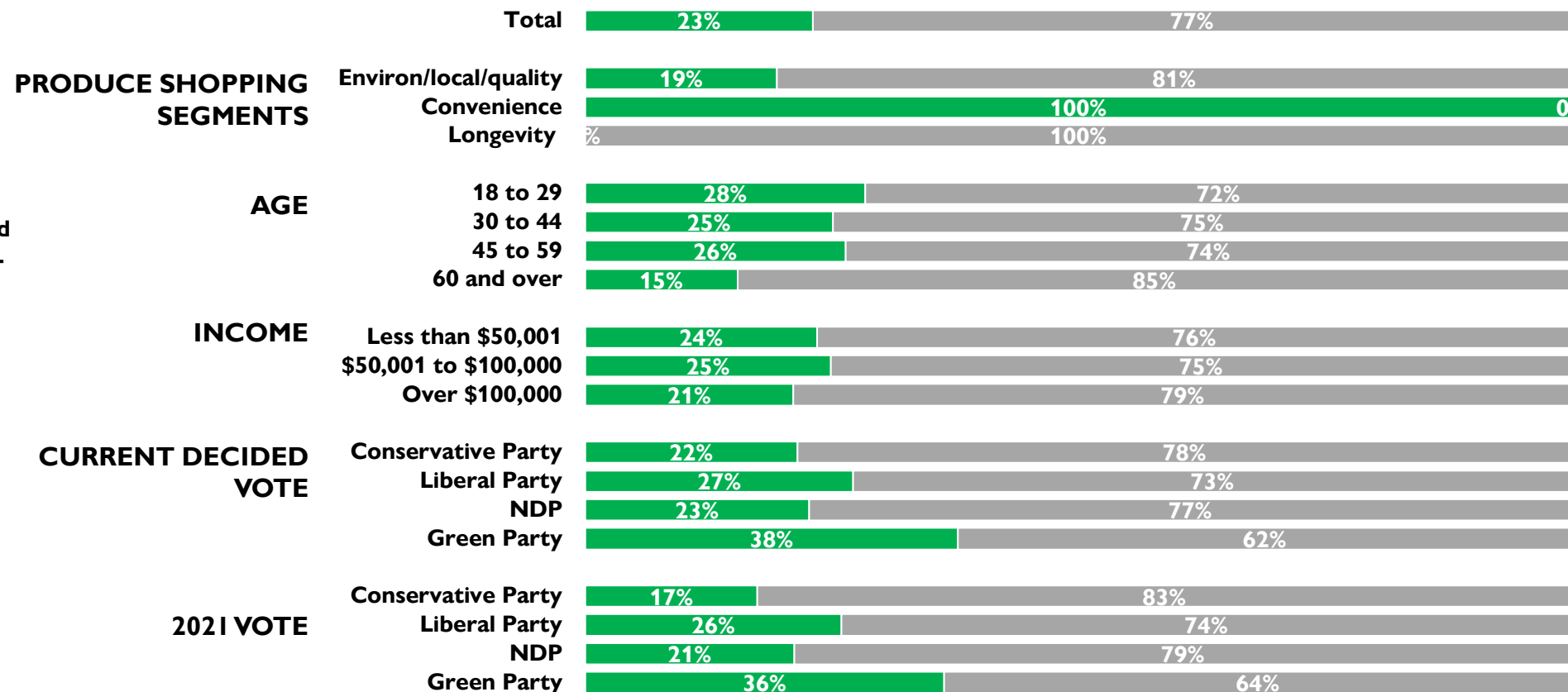


Are you someone who...

# CONVENIENCE

■ Likes to buy produce that is pre-washed and ready to eat (like a salad kit or pre-cut fruit)

■ Likes to buy produce that has not been pre-prepared in any way, therefore requiring you to wash and prepare yourself

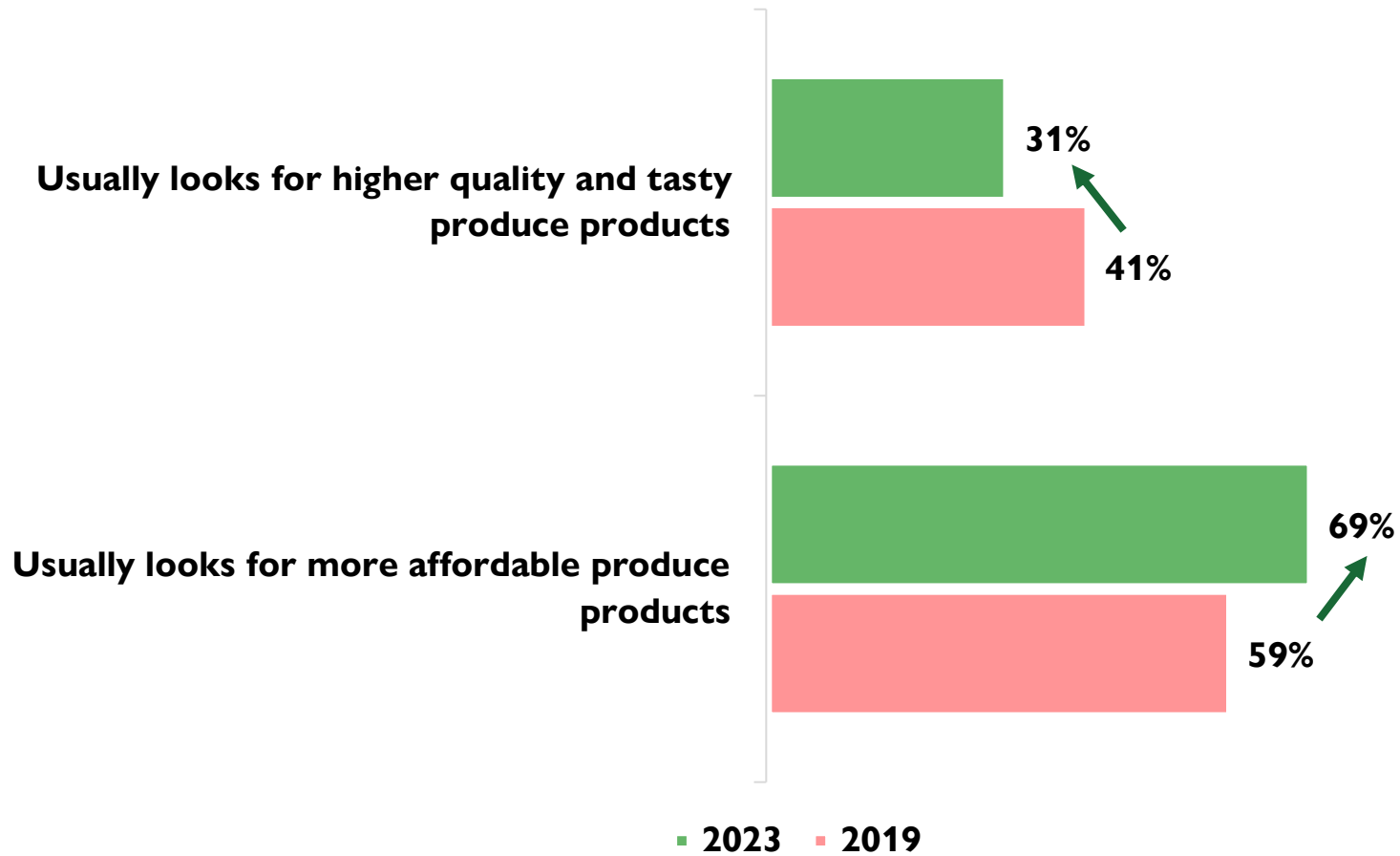


Base: All (n=1,500)



Are you someone who...

## AFFORDABILITY VS. QUALITY / TASTE



As cost pressures mount, a significant 69% of consumers are now actively seeking affordable produce options, marking a 10-point surge from 2019. This increased price sensitivity potentially makes consumers more accepting of compromises in other areas, such as packaging.

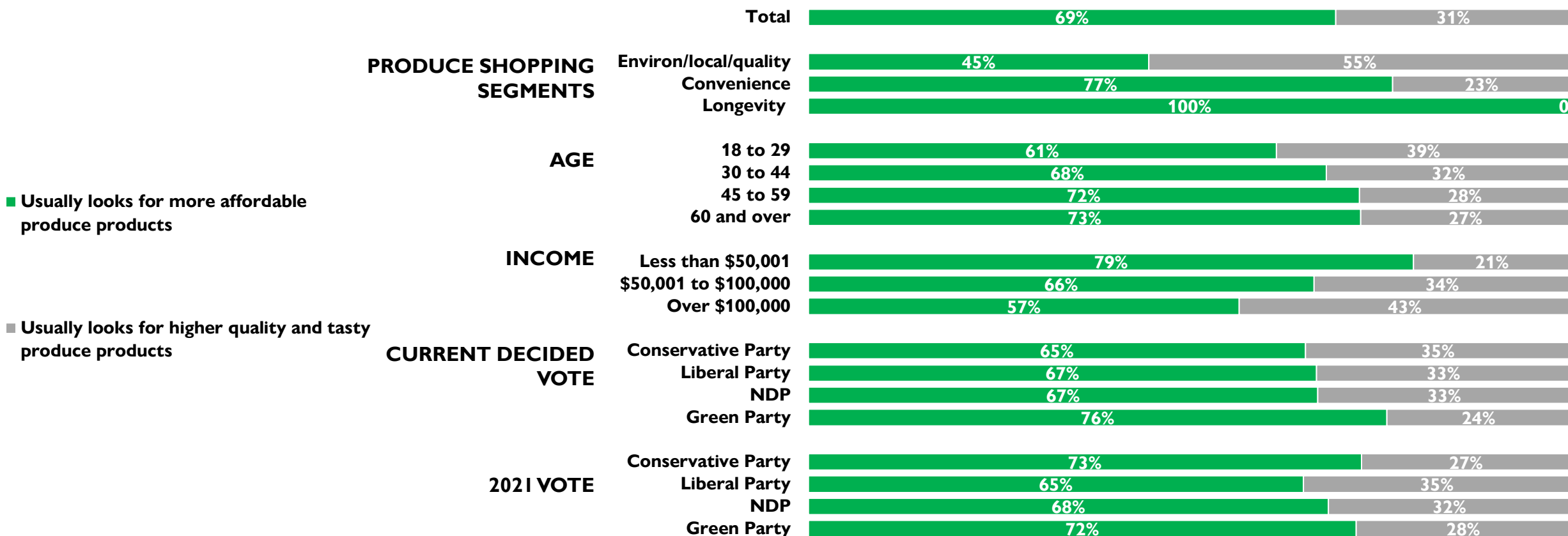
Base: All (n=1,500)





Are you someone who...

# AFFORDABILITY VS. QUALITY / TASTE

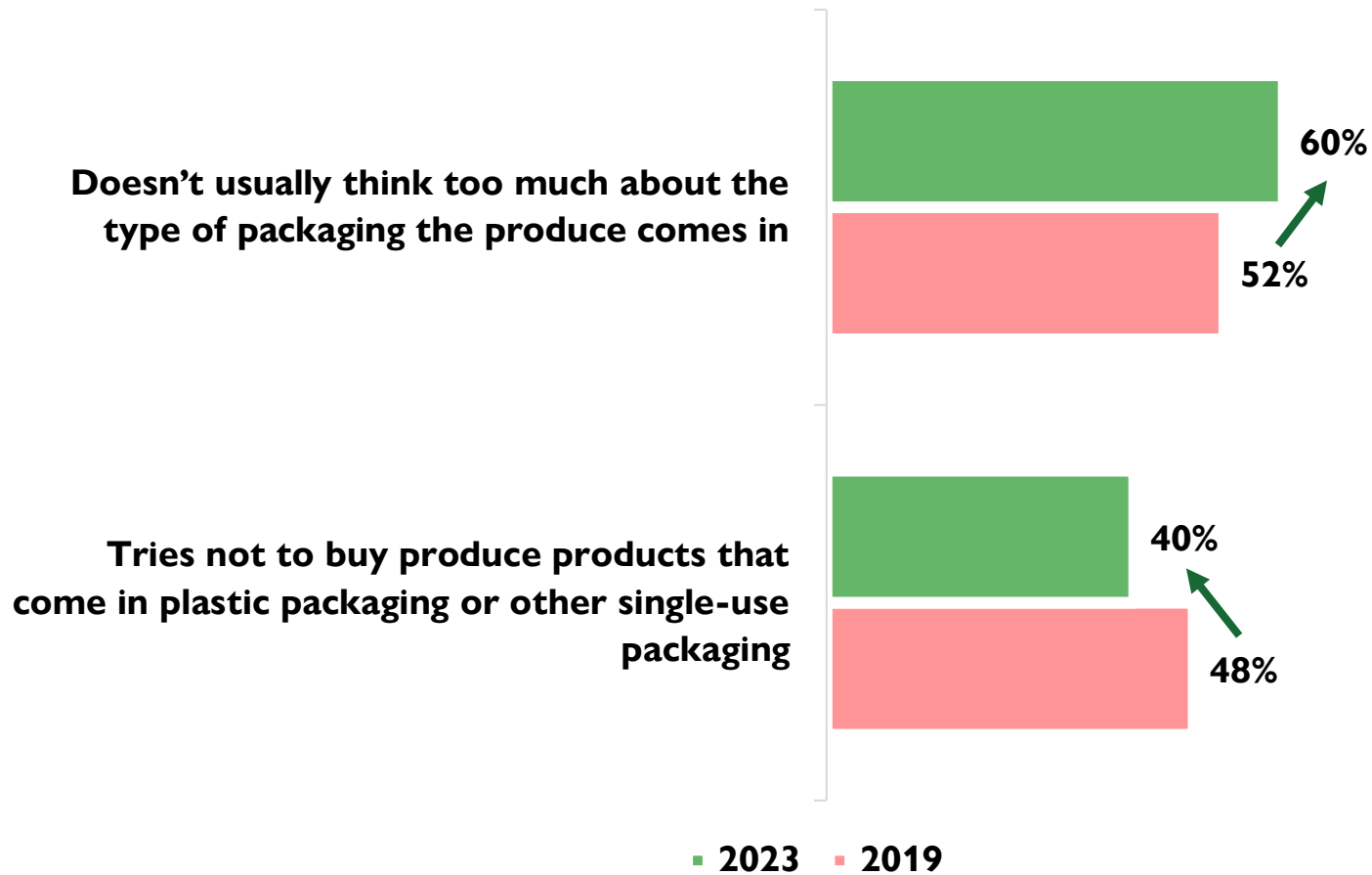


Base: All (n=1,500)



Are you someone who...

## LIMIT USE OF PLASTICS



In 2019, nearly half of the consumers (48%) attempted to limit their purchase of produce in plastic packaging. This number has seen a decline, with only 40% now expressing the same sentiment. The decreased inclination to avoid plastic-packaged produce may be a direct consequence of the rising costs of living, where immediate economic concerns override longer-term environmental considerations.

Base: All (n=1,500)

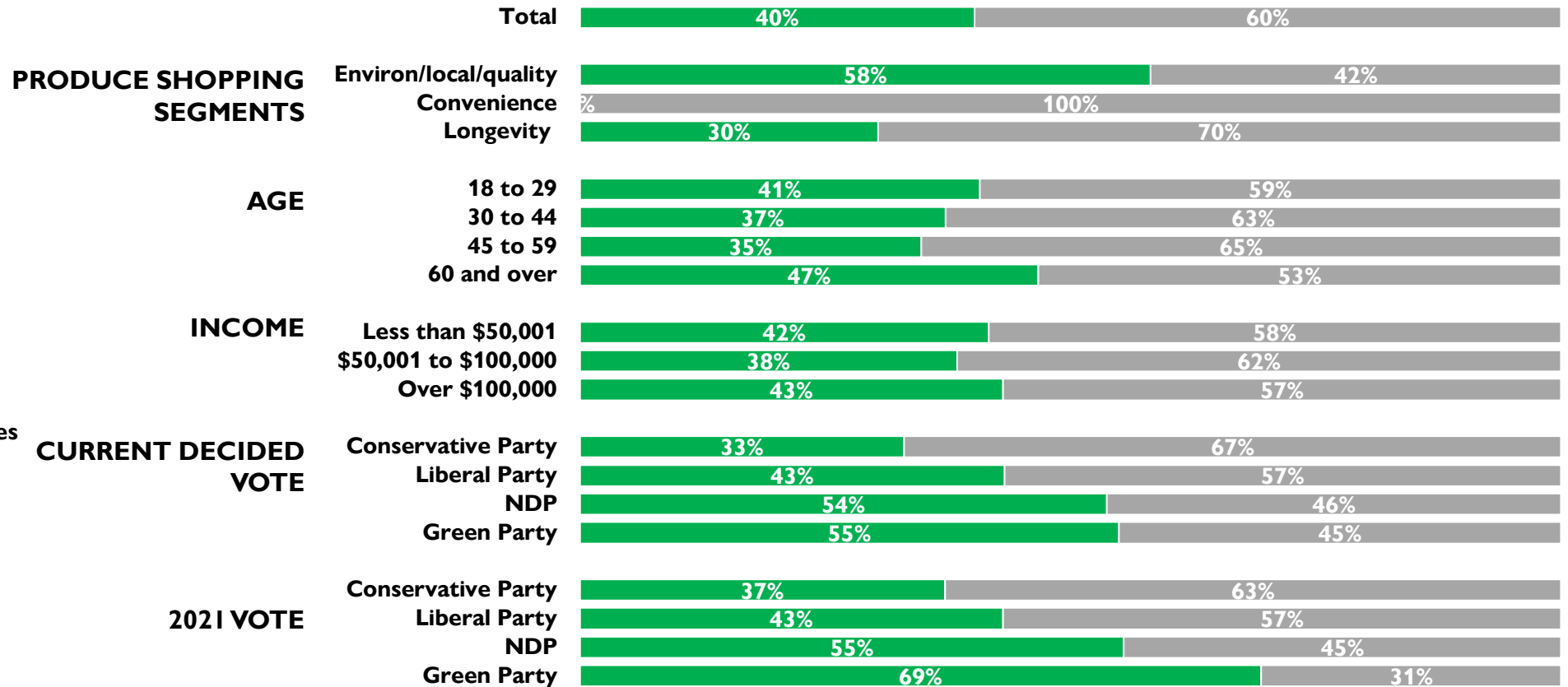


Are you someone who...

# LIMIT USE OF PLASTICS

■ Tries not to buy produce products that come in plastic packaging or other single-use packaging

■ Doesn't usually think too much about the type of packaging the produce comes in

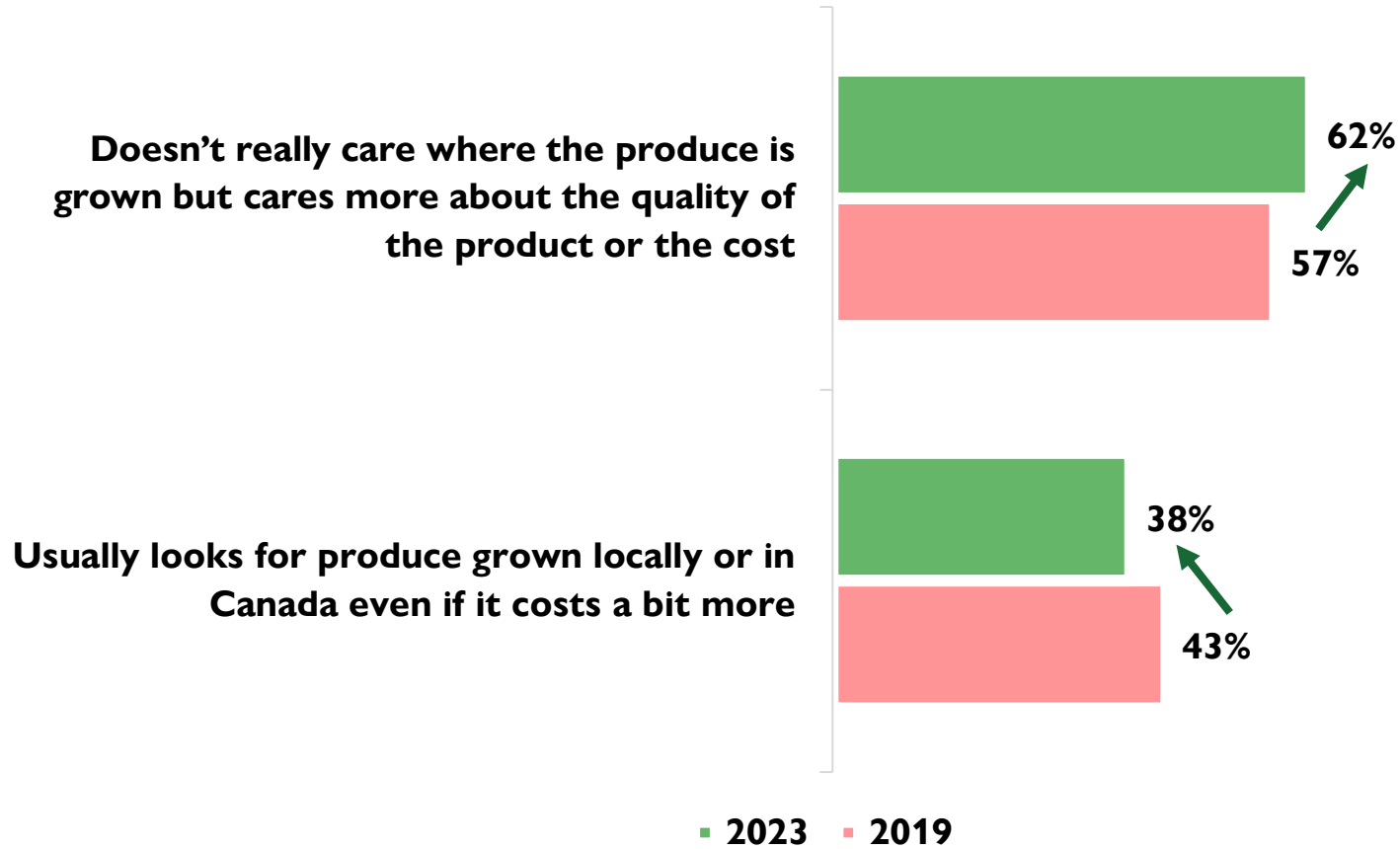


Base: All (n=1,500)



Are you someone who...

# LOCALLY GROWN



A significant majority of Canadian consumers, accounting for nearly two-thirds, demonstrate a lack of interest in the origin of their produce. Instead, their primary concerns revolve around product quality and cost. Notably, this figure has seen a 5% increase since 2019.

Base: All (n=1,500)

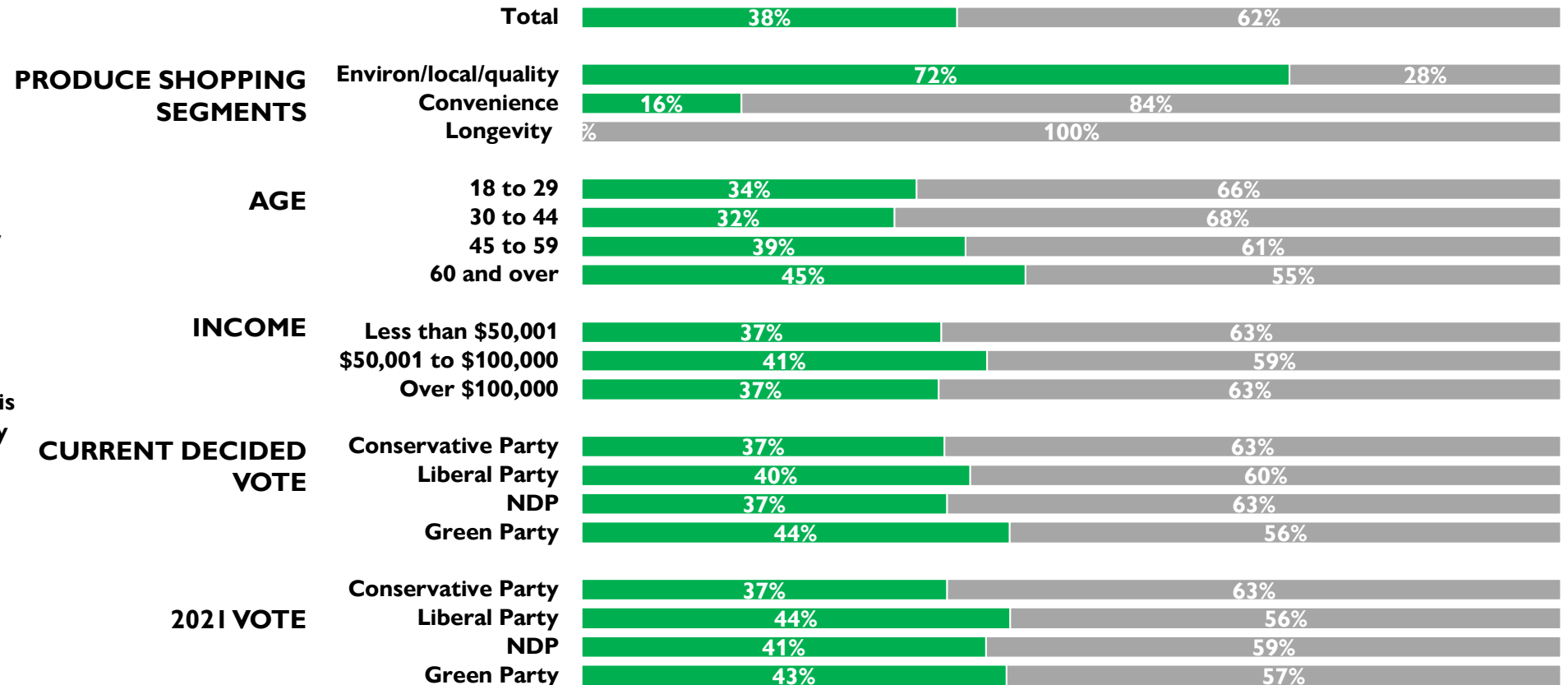


Are you someone who...

# LOCALLY GROWN

■ Usually looks for produce grown locally or in Canada even if it costs a bit more

■ Doesn't really care where the produce is grown but cares more about the quality of the product or the cost



Base: All (n=1,500)

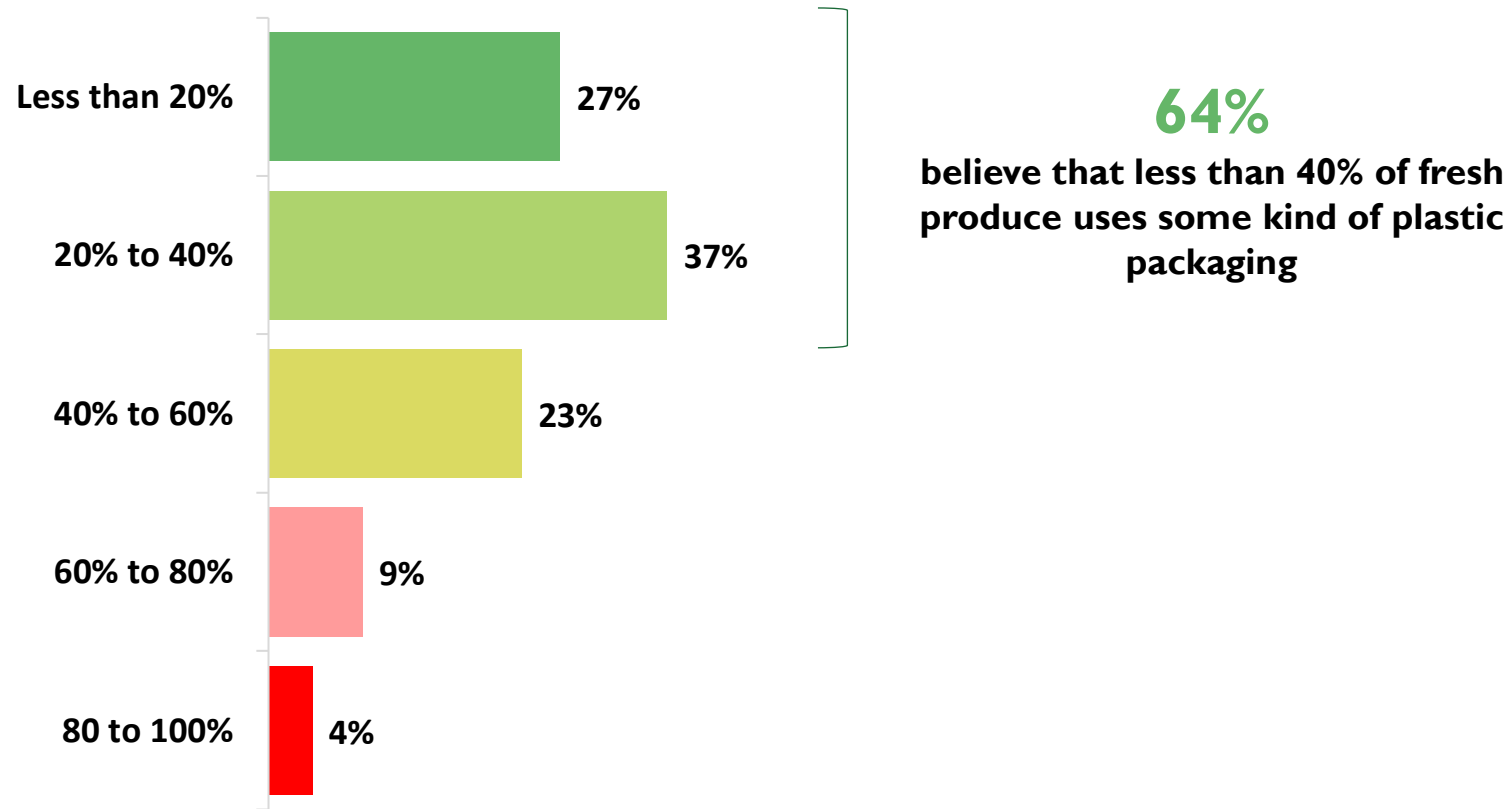
# Perceptions on Plastic Packaging





When you think about the store you usually buy fresh produce, how much fresh fruit and vegetable products at the grocery store uses some kind of plastic packaging?

## Canadians are largely unaware of the amount of plastic packaging used for fresh produce, with two-thirds (64%) believing that less than 40% of fresh produce uses some kind of plastic packaging

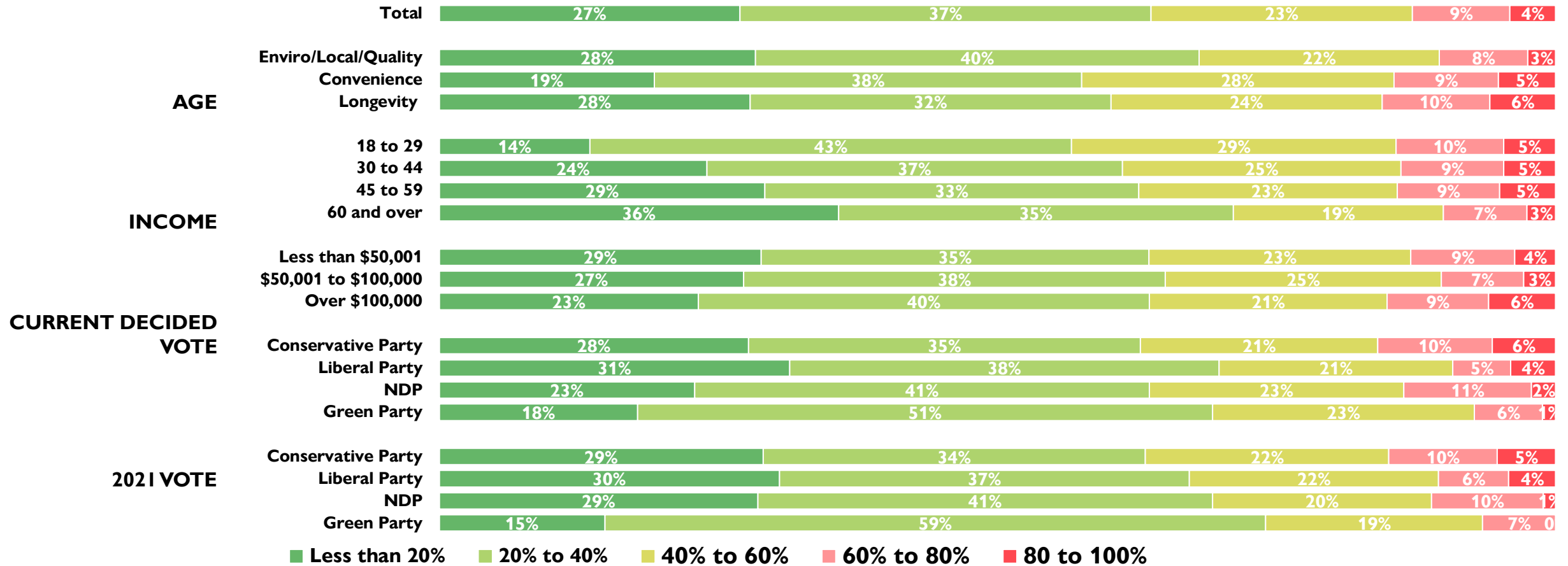


Base: All (n=1,500)



When you think about the store you usually buy fresh produce, how much fresh fruit and vegetable products at the grocery store uses some kind of plastic packaging?

## AWARENESS OF PLASTIC PACKAGING USED FOR PRODUCE

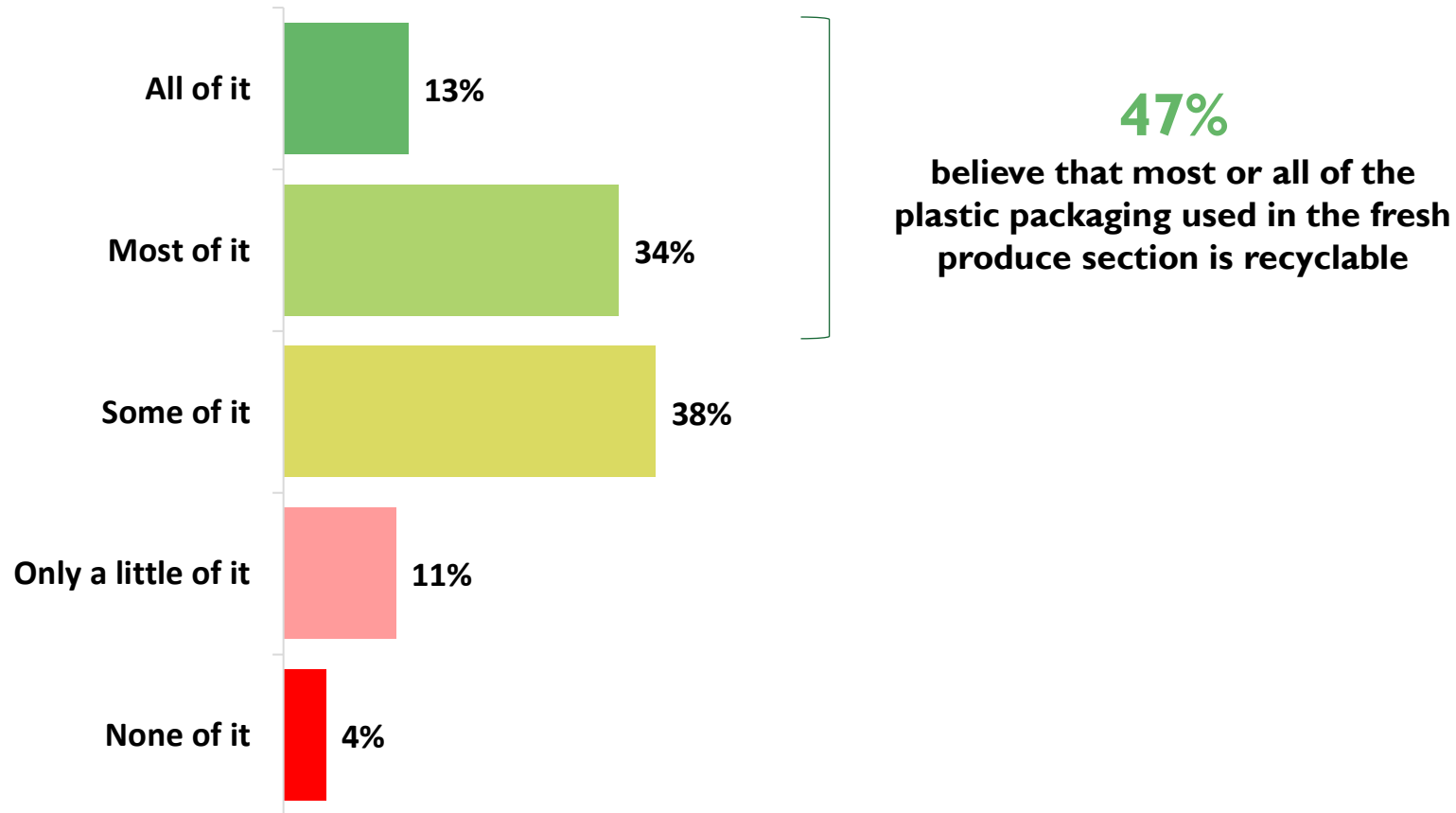


Base: All (n=1,500)



And about how much of the plastic packing used in the fresh produce section do you think is recyclable or not recyclable?

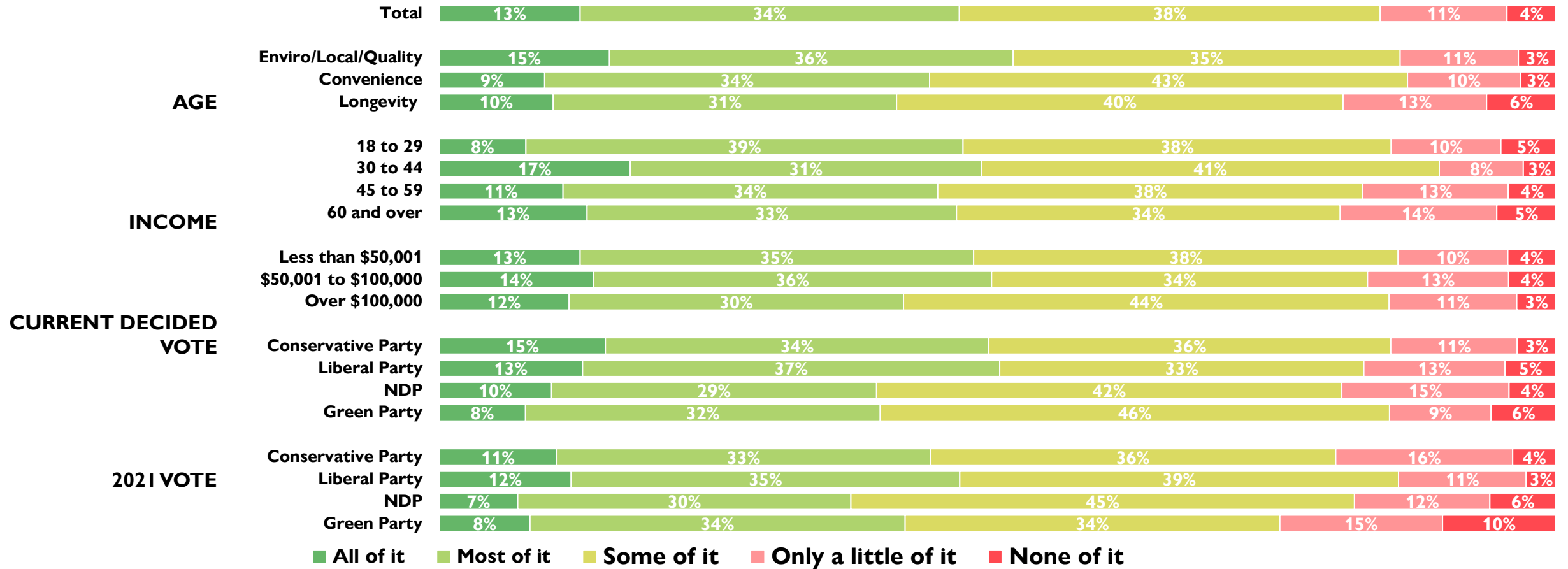
## Of the plastic packaging used, roughly 1 in 2 Canadians believe that most or all of it is recyclable



Base: All (n=1,500)

And about how much of the plastic packing used in the fresh produce section do you think is recyclable or not recyclable?

## AMOUNT OF RECYCLABLE PLASTIC PACKAGING USED

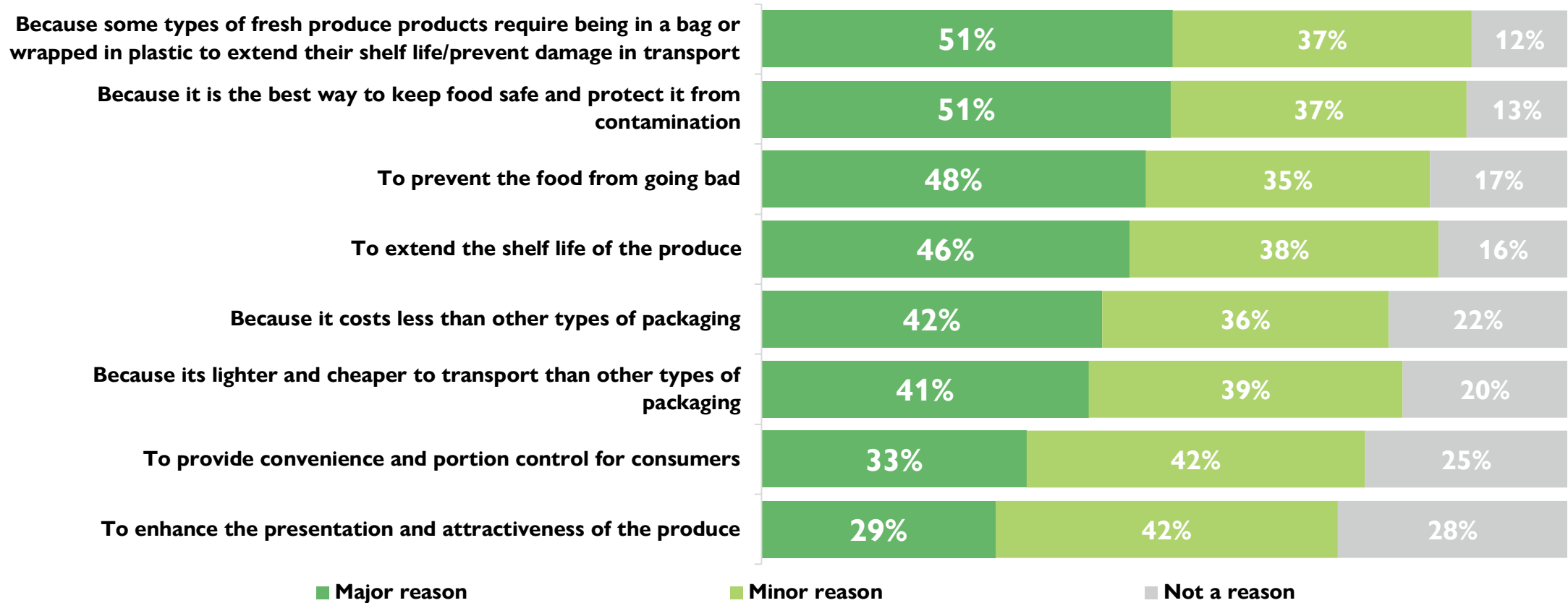


Base: All (n=1,500)



Plastic packaging is used for some fresh fruit and vegetables for various reasons. For each of the following, please tell me whether you think it is a major reason, minor reason, or not a reason.

## Most Canadians believe plastic packaging is used to extend shelf life/prevent damage in transport, protect food from contamination, prevent food from going bad, and to extend the shelf life of the produce.



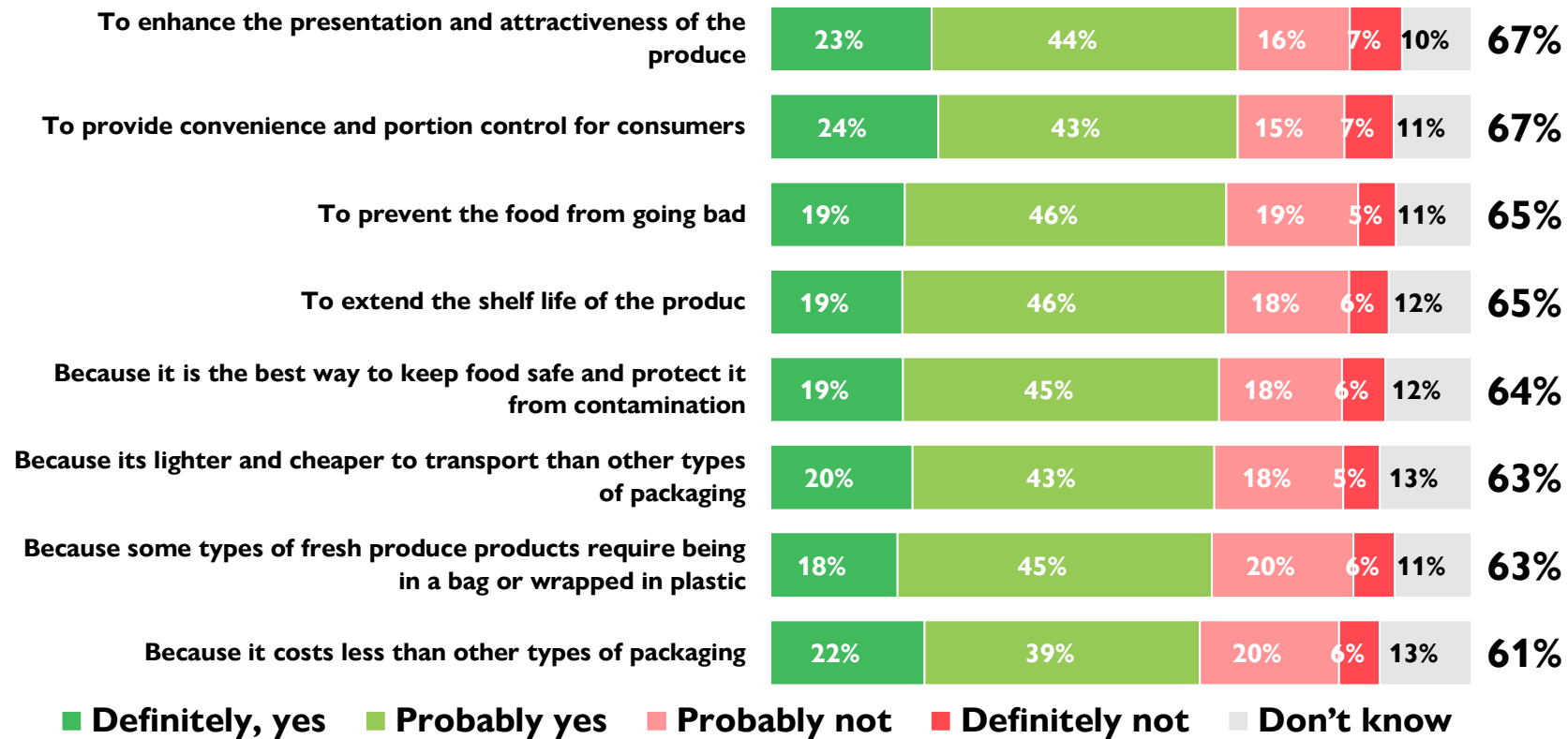
Base: All (n=1,500)



Now, looking at the same list of reasons plastics could be used to package fresh produce, do you think it is possible to achieve each outcome without using plastic packaging?

## Two-thirds of Canadians believe that it is possible to achieve comparable outcomes without using plastic packaging.

Probably yes +  
Definitely yes

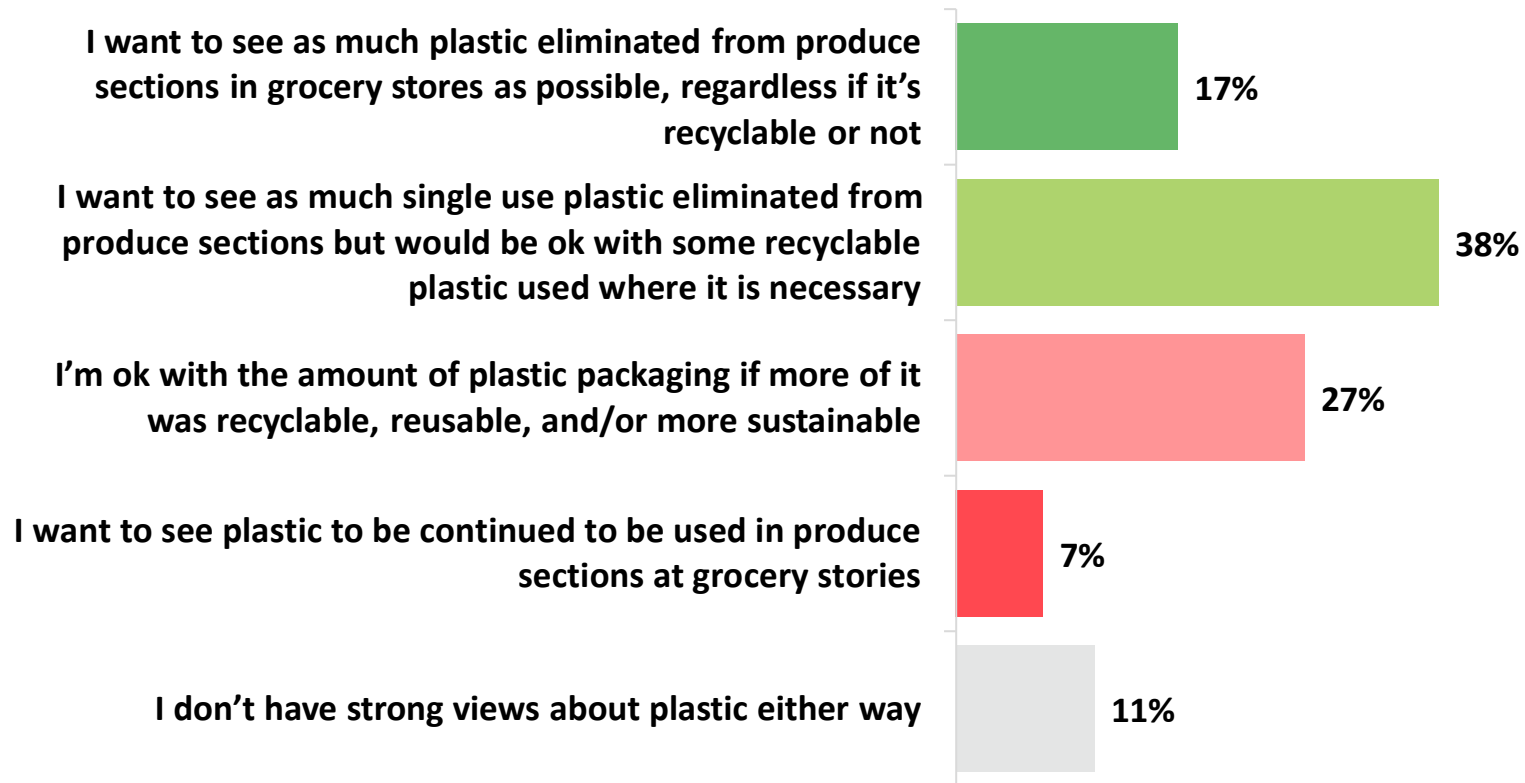


Base: All (n=1,500)



Which of the following comes closest to your view?

**Less than 1 in 5 Canadians want to see as much plastic eliminated as possible in produce sections. In contrast, 2 in 5 advocate for the elimination of single use plastics, while 1 in 4 are focused on more recyclable, reusable, and sustainable packaging.**



Base: All (n=1,500)



Which of the following comes closest to your view?

## PERCEPTION OF THE ELIMINATION OF PLASTIC PACKAGING

**I want to see as much plastic eliminated from produce sections in grocery stores as possible, regardless if it's recyclable or not**

**I want to see as much single use plastic eliminated from produce sections but would be ok with some recyclable plastic used where it is necessary**

**I'm ok with the amount of plastic packaging if more of it was recyclable, reusable, and/or more sustainable**

**I want to see plastic to be continued to be used in produce sections at grocery stores**

**I don't have strong views about plastic either way**

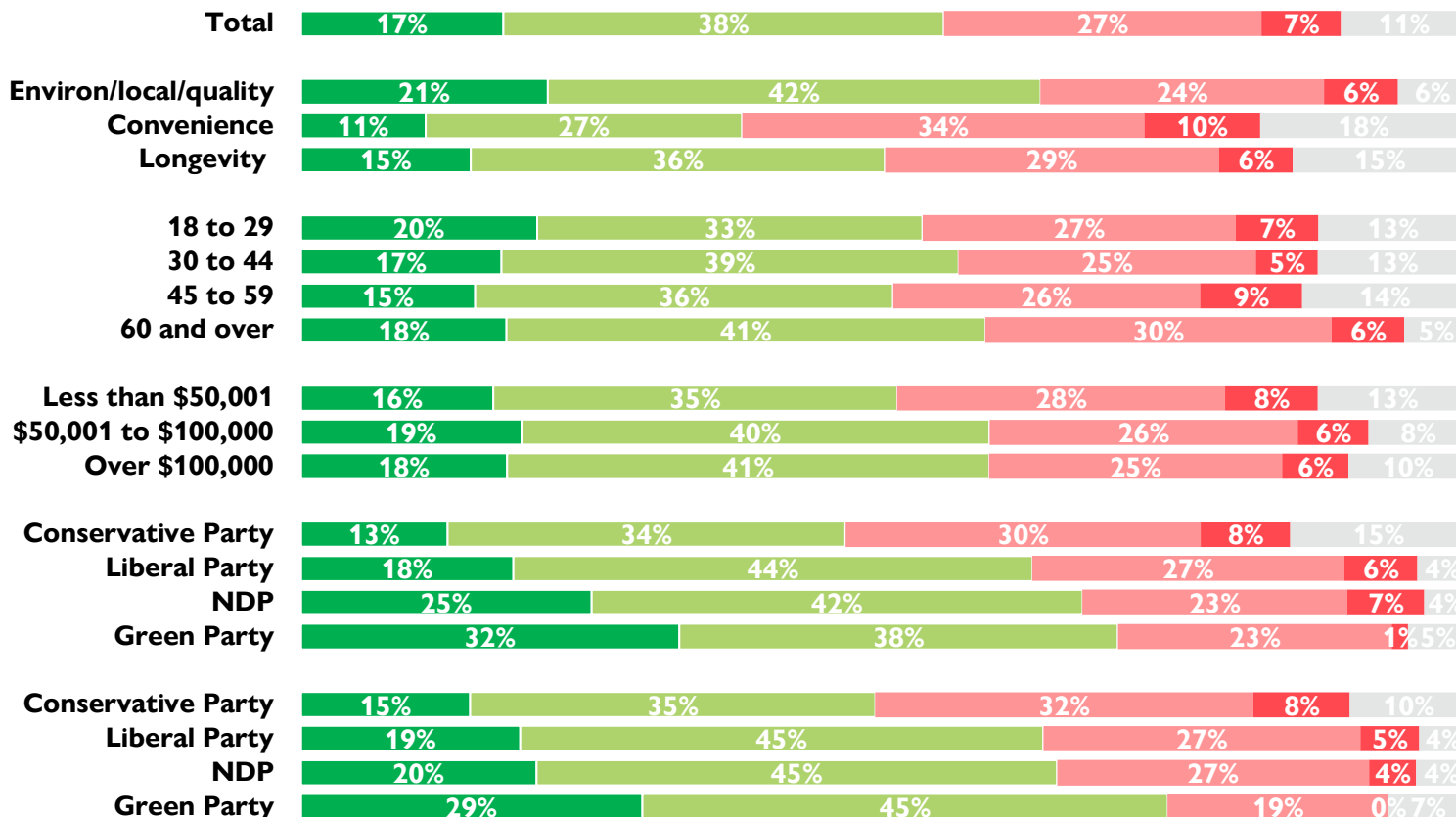
### PRODUCE SHOPPING SEGMENTS

### AGE

### INCOME

### CURRENT DECIDED VOTE

### 2021 VOTE



Base: All (n=1,500)

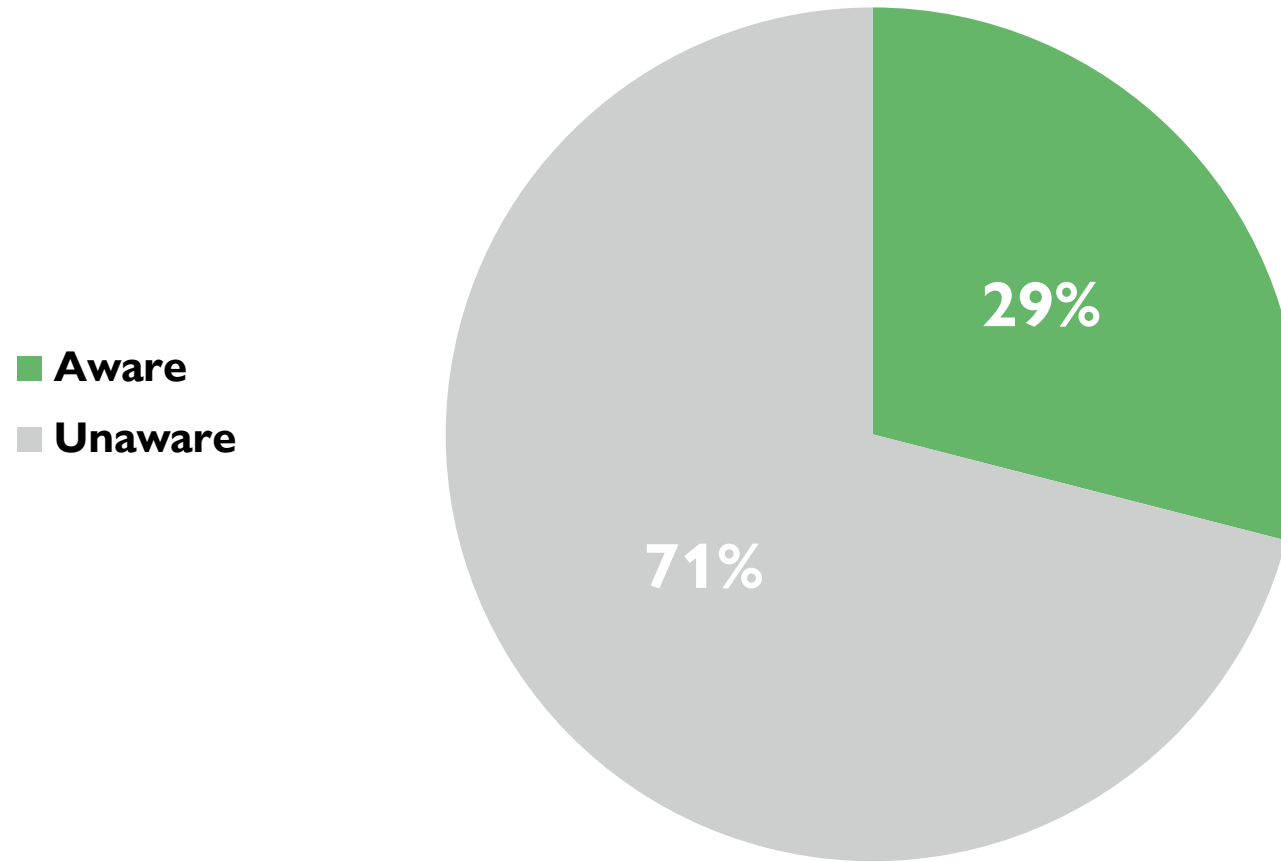
# Perceptions of the Government Proposal to Achieve 95% Plastic-Free Packaging





Before today, were you aware of this government proposal?

## Less than one in three Canadians were aware of the government proposal to ensure that (at least) 95% fresh fruits and vegetables are sold in plastic-free packaging by 2028



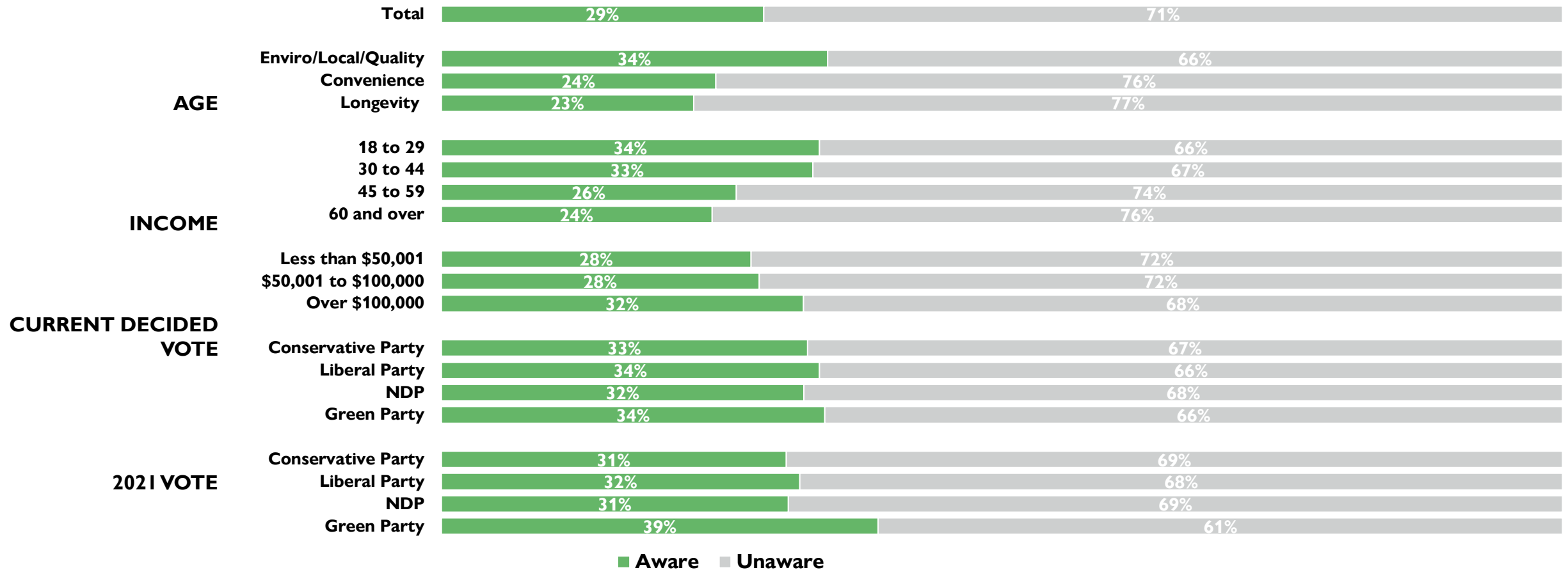
Base: All (n=1,500)





Before today, were you aware of this government proposal?

## AWARENESS OF THE GOVERNMENT PROPOSAL TO ELIMINATE PLASTICS

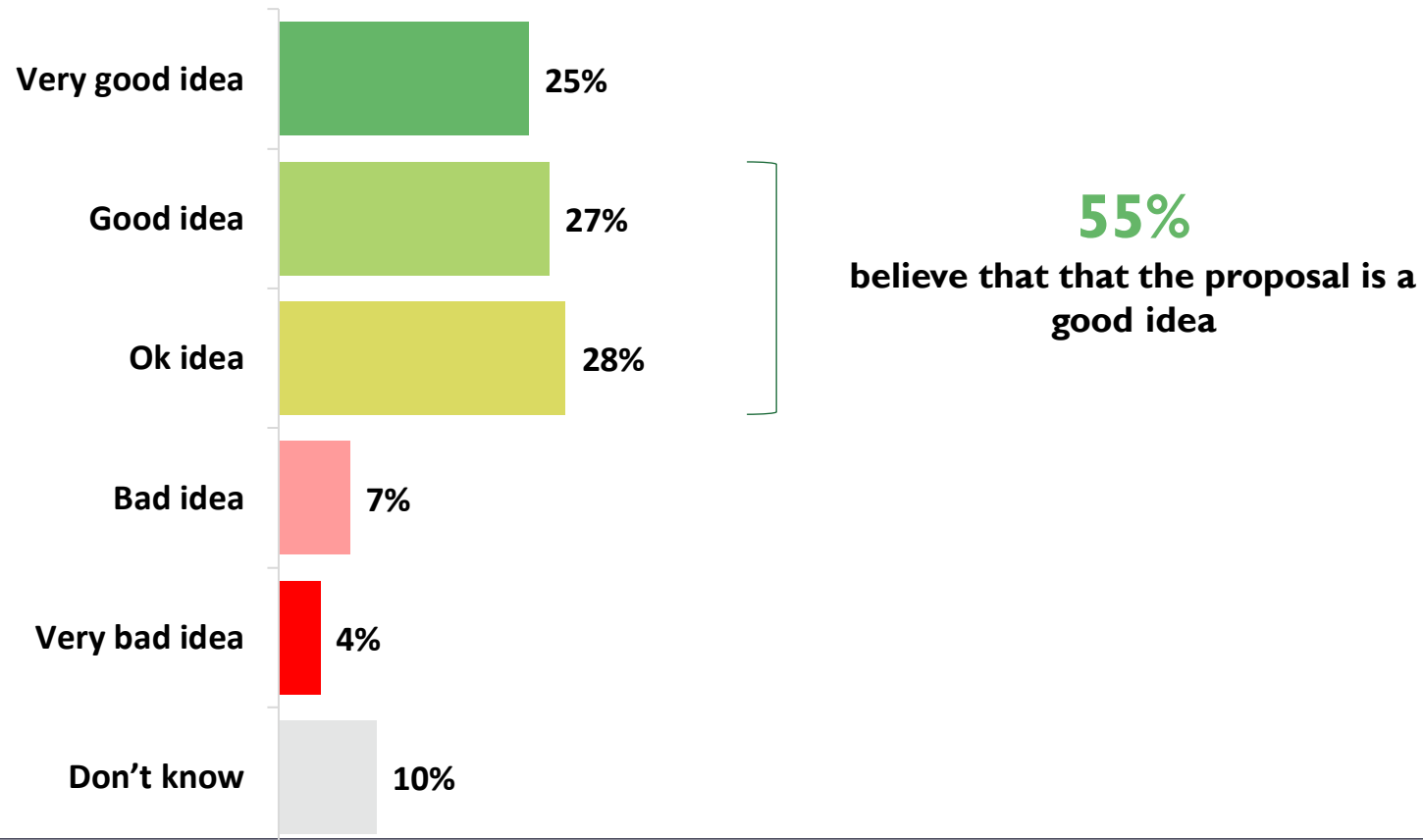


Base: All (n=1,500)



Do you think this proposal is a good idea or a bad idea?

## 1 in 4 Canadians strongly support this idea, while slightly over 1 in 2 feel that it is a good idea.

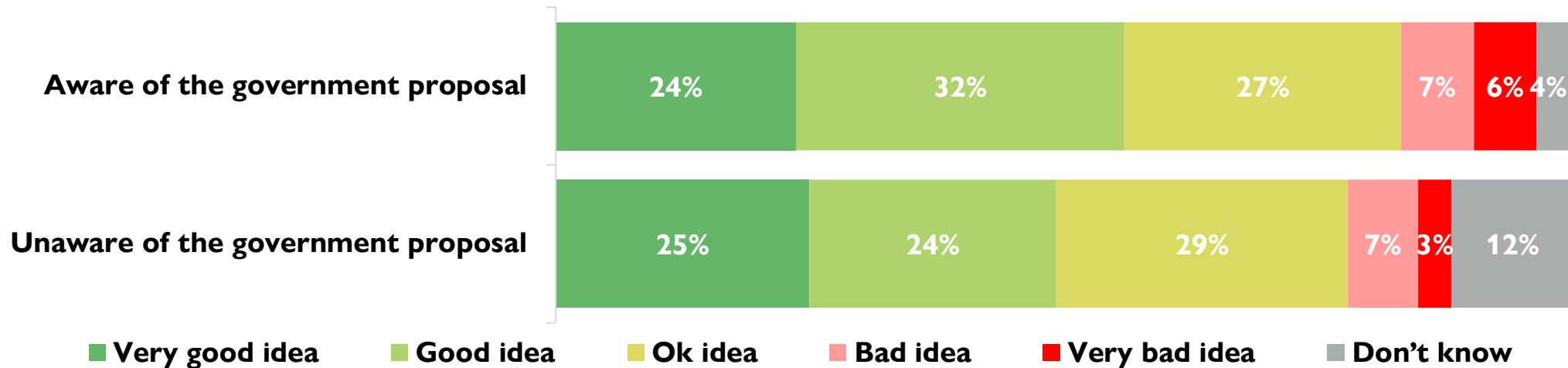


Base: All (n=1,500)



Do you think this proposal is a good idea or a bad idea?

**Those who were previously aware of the government proposal were more likely to support the idea (56%) compared to those who were unaware (49%)**



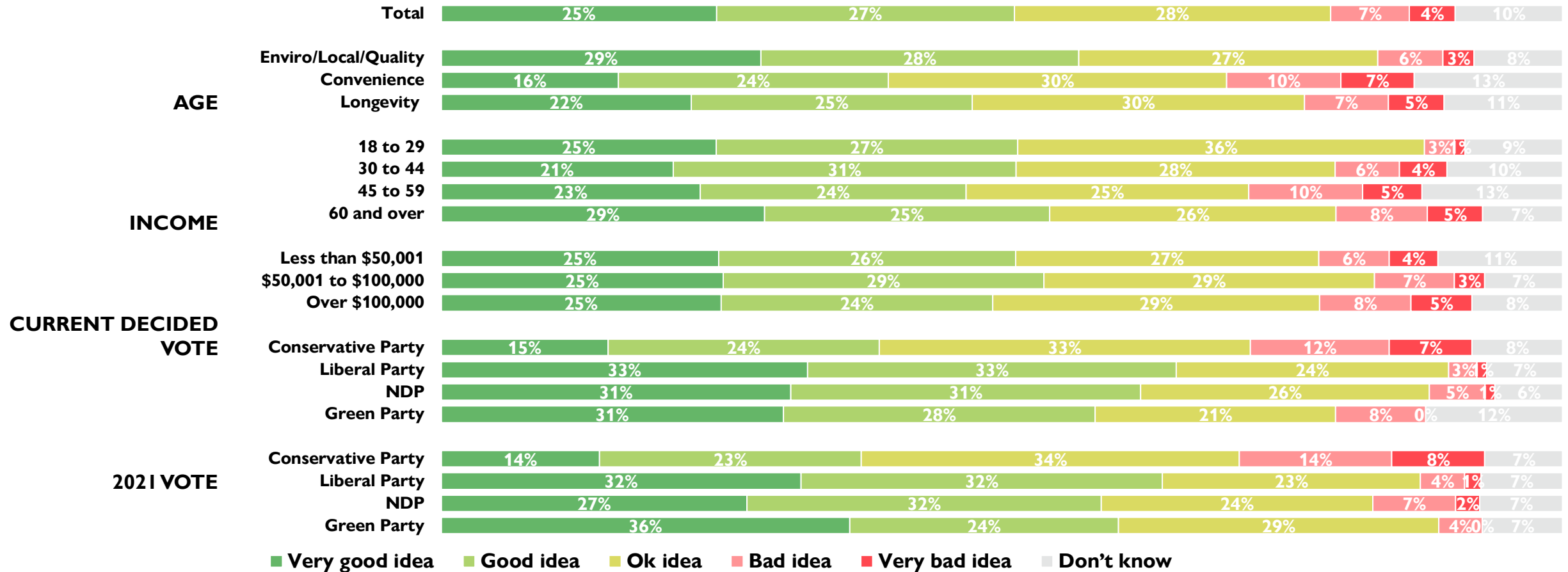
Base: All (n=1,500)

Do you think this proposal is a good idea or a bad idea? by Before today, were you aware of this government proposal?



Do you think this proposal is a good idea or a bad idea?

# SUPPORT FOR THE GOVERNMENT PROPOSAL

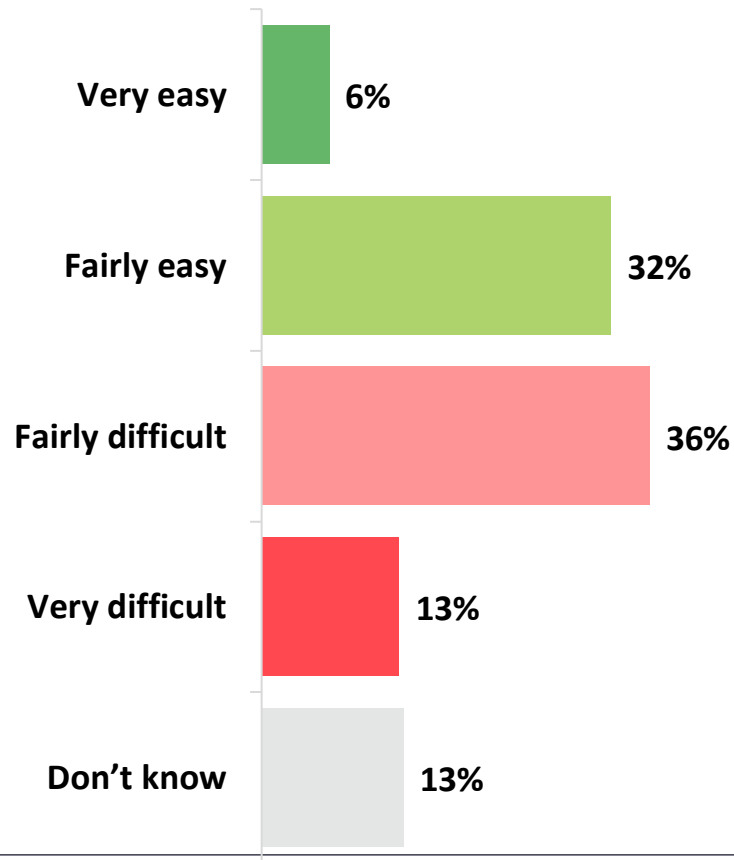


Base: All (n=1,500)



Do you think it will be easy or difficult for companies that produce, package, and ship fresh produce in Canada to achieve the goal of 95% of all fruits and vegetables be sold in plastic-free packaging by 2028?

**Canadians are largely split on the perceived difficulty for companies to achieve the goal of 95% of all fruits and vegetables to be sold in plastic-free packaging by 2028. This suggests that people are largely unaware of the challenges related to making this transition.**

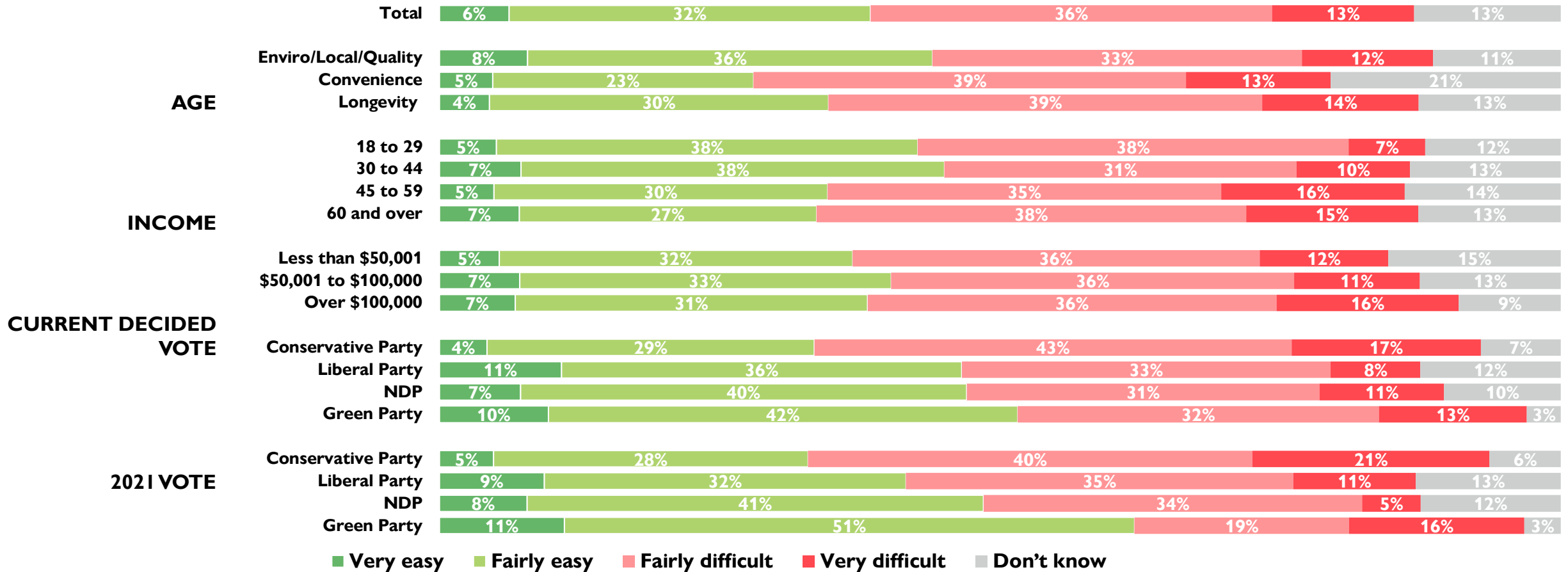


Base: All (n=1,500)



Do you think it will be easy or difficult for companies that produce, package, and ship fresh produce in Canada to achieve the goal of 95% of all fruits and vegetables be sold in plastic-free packaging by 2028?

## LEVEL OF DIFFICULTY TO ACHIEVE THE GOAL OF 95% PLASTIC-FREE PACKAGING

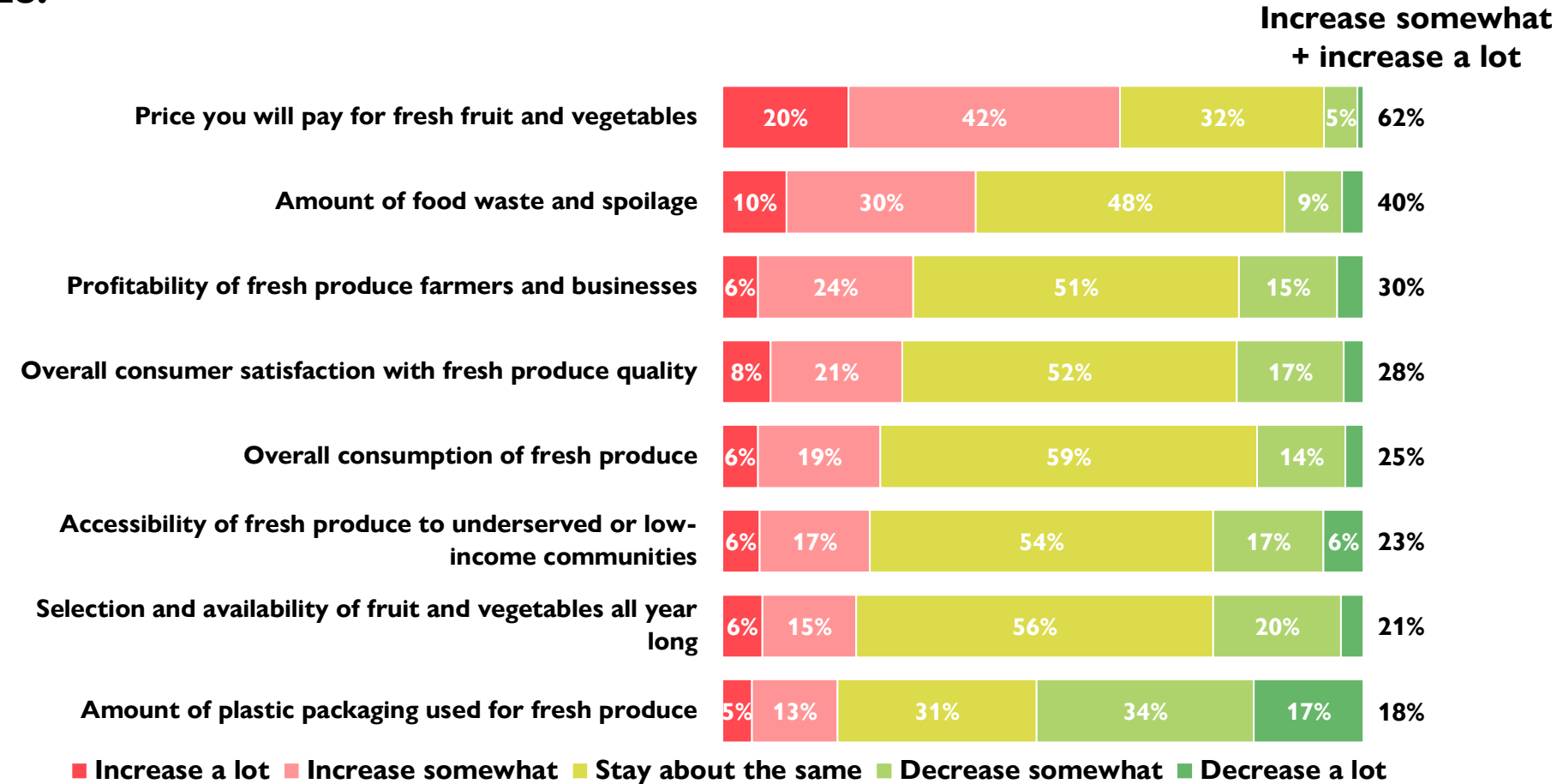


Base: All (n=1,500)



What impact do you think this government proposal will have on the following?

**Fear of rising prices of fruit and vegetables (62%) is the largest concern pertaining to the government's proposal that (at least) 95% of fruits and vegetables be sold in plastic-free packaging by 2028.**



Base: All (n=1,500)

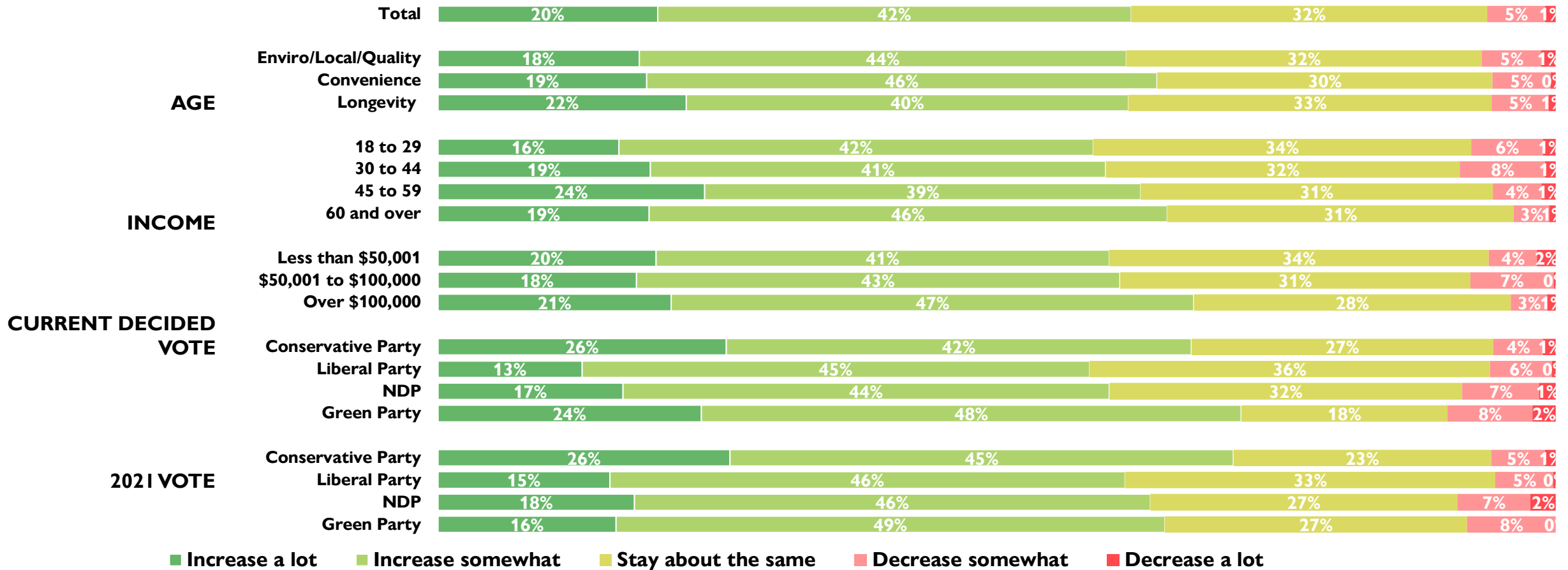
Note: Values less than 5% not shown.





What impact do you think this government proposal will have on the following?

## IMPACT ON THE PRICE YOU WILL PAY FOR FRESH FRUIT AND VEGETABLES



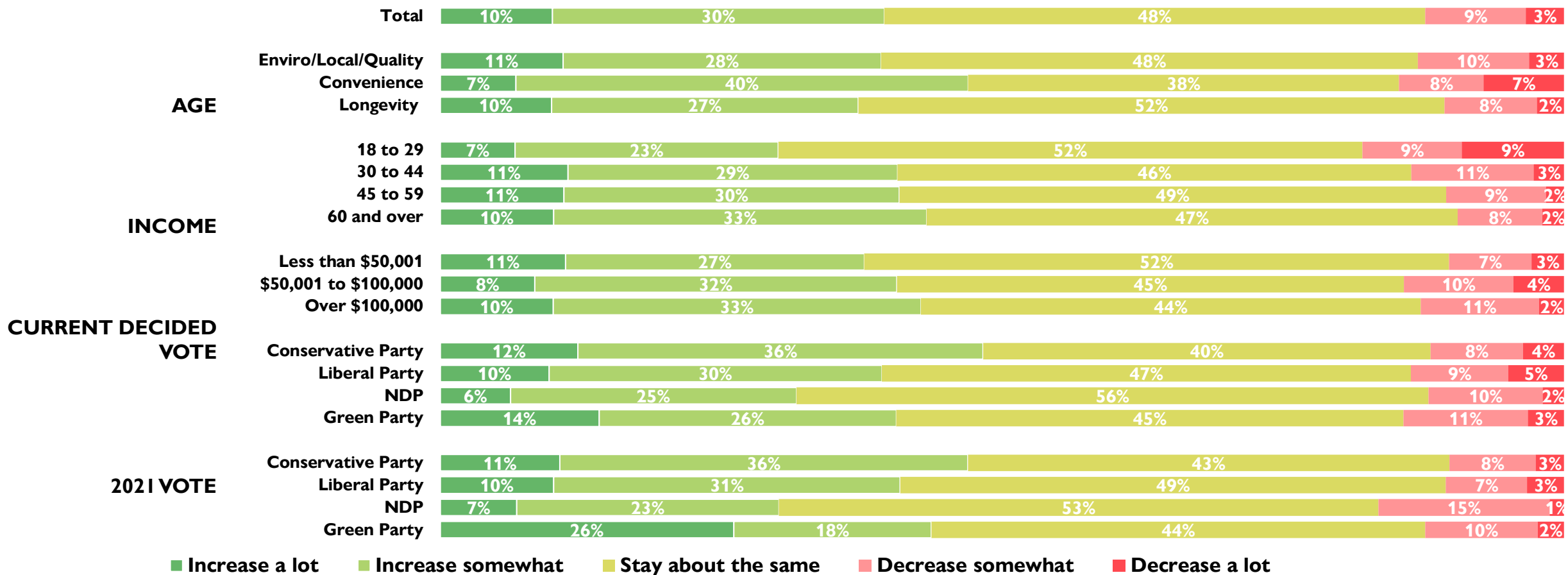
Base: All (n=1,500)

Note: Values less than 5% not shown.



What impact do you think this government proposal will have on the following?

## THE AMOUNT OF FOOD WASTE AND SPOILAGE



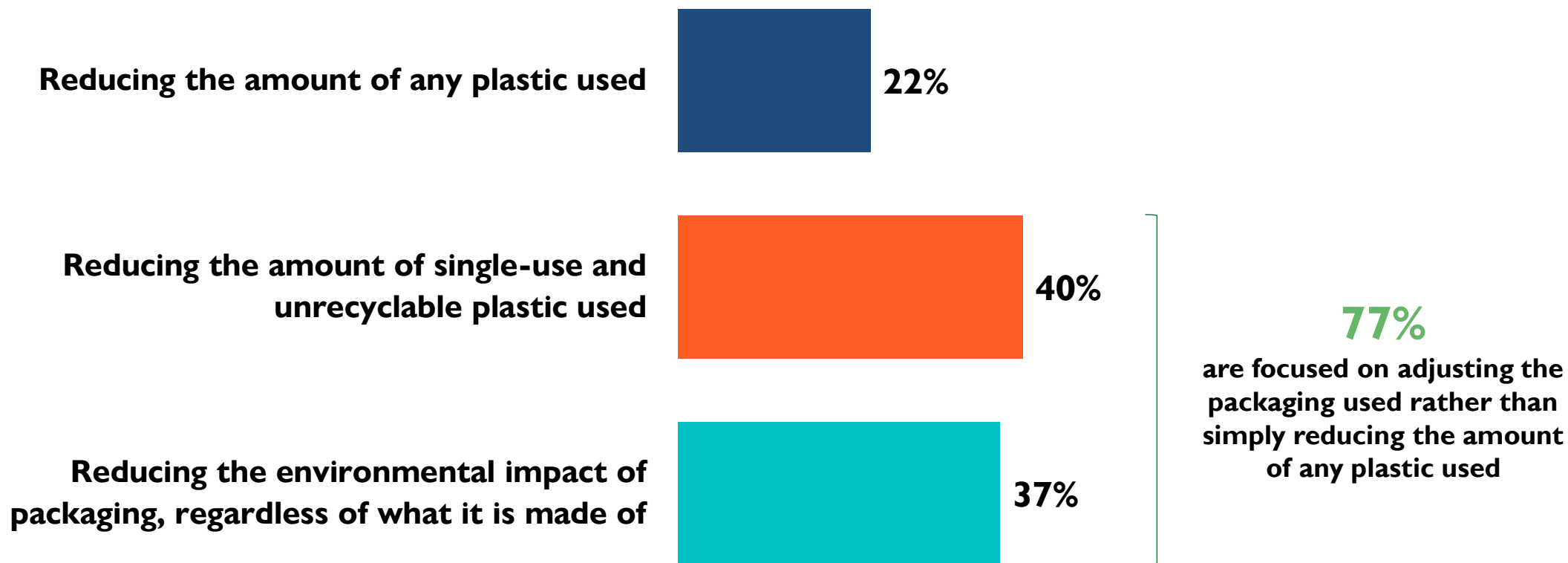
Base: All (n=1,500)

Note: Values less than 5% not shown.



What is more important to you?

**Only 1 in 5 Canadians prioritize general plastic reduction, while two in five lean towards reducing single-use and unrecyclable plastics, and one in three are more focused on minimizing the environmental impact of packaging**

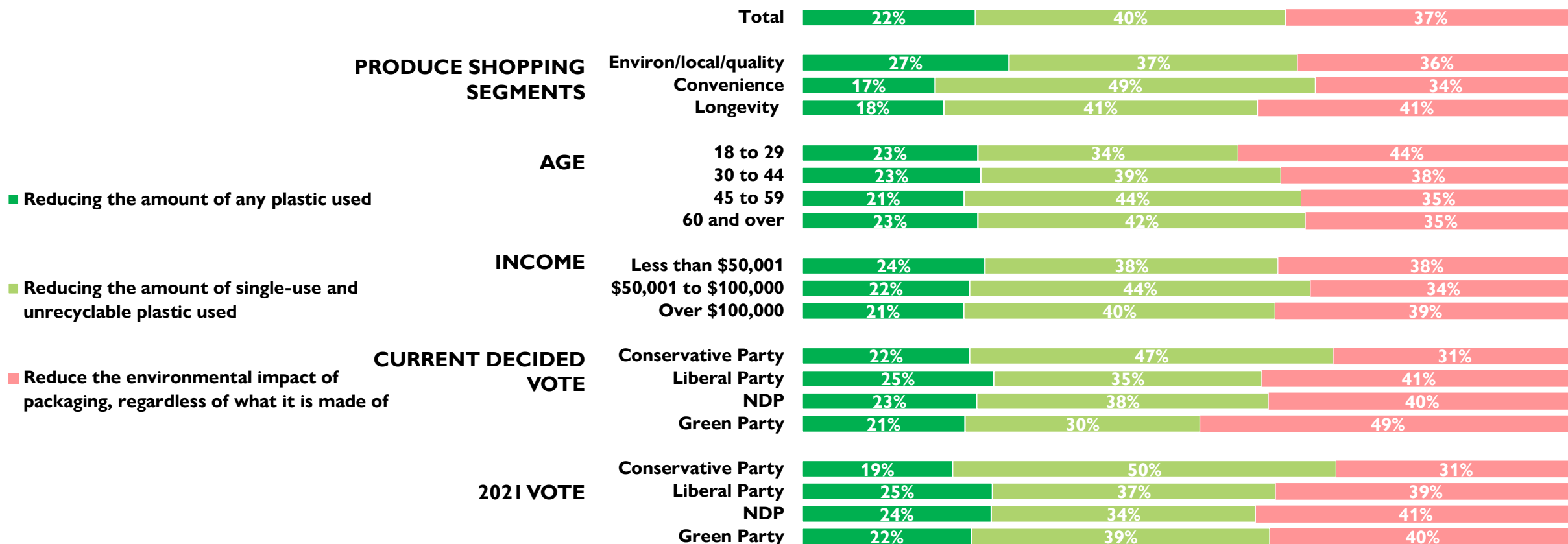


Base: All (n=1,500)



What is more important to you?

## PERCEPTIONS AROUND THE REDUCTION OF PLASTIC PACKAGING



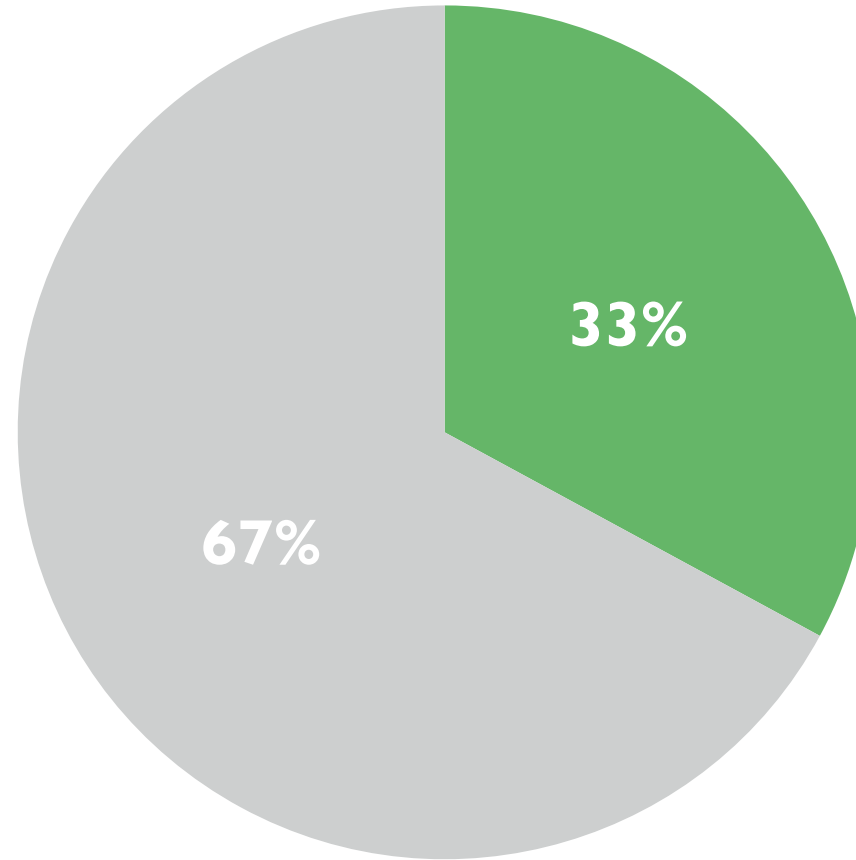
Base: All (n=1,500)



What is more important to you?

## REDUCE PLASTIC USED VS. KEEP COSTS DOWN

- Reducing the amount of plastic used
- Keep the cost of fresh fruit and produce as low as possible

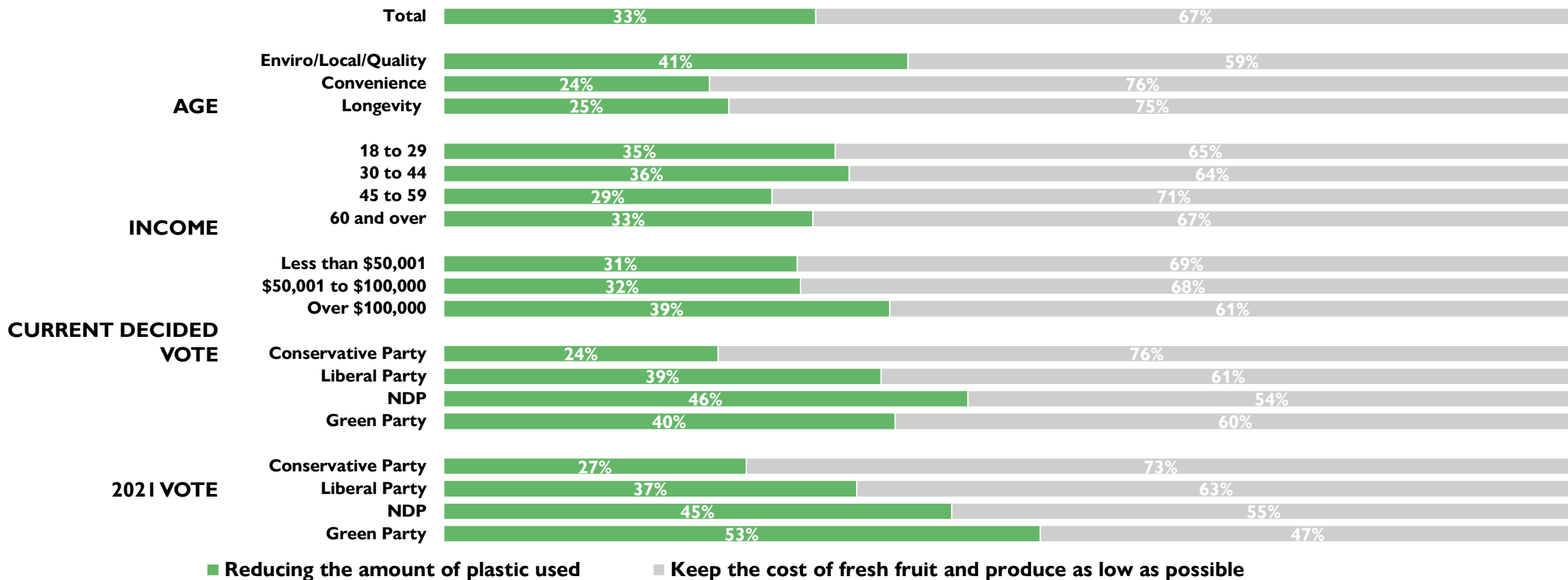


Base: All (n=1,500)



What is more important to you?

# REDUCE PLASTIC USED VS. KEEP COSTS DOWN



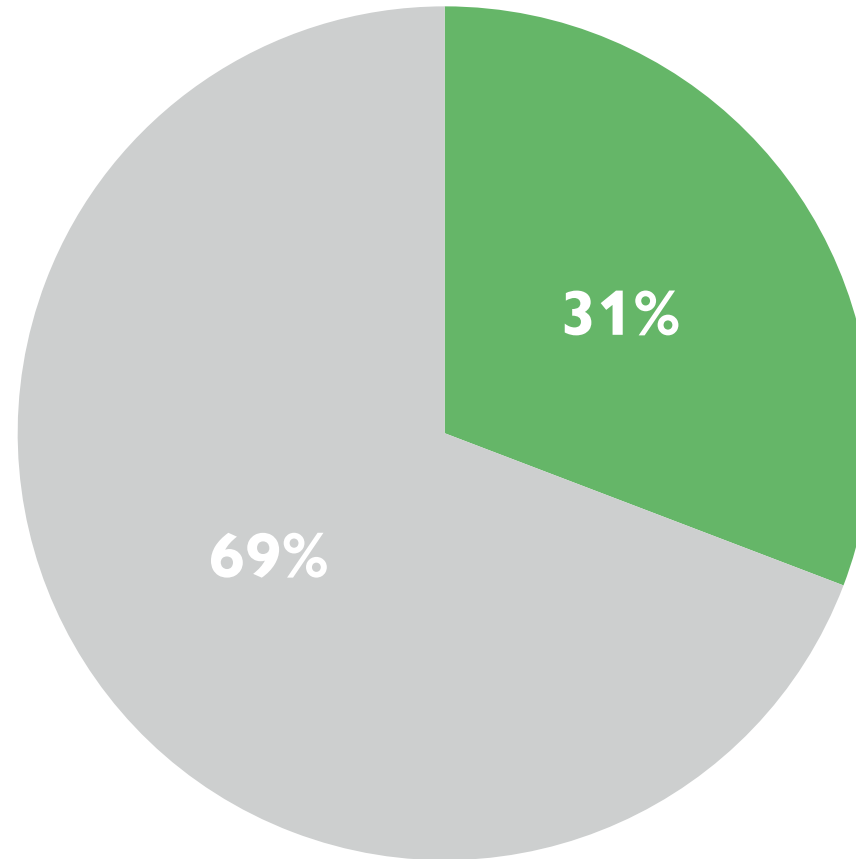
Base: All (n=1,500)



What is more important to you?

## REDUCE PLASTIC USED VS. PREVENT FOOD WASTE

- Reducing the amount of plastic used
- Preventing as much food waste as possible



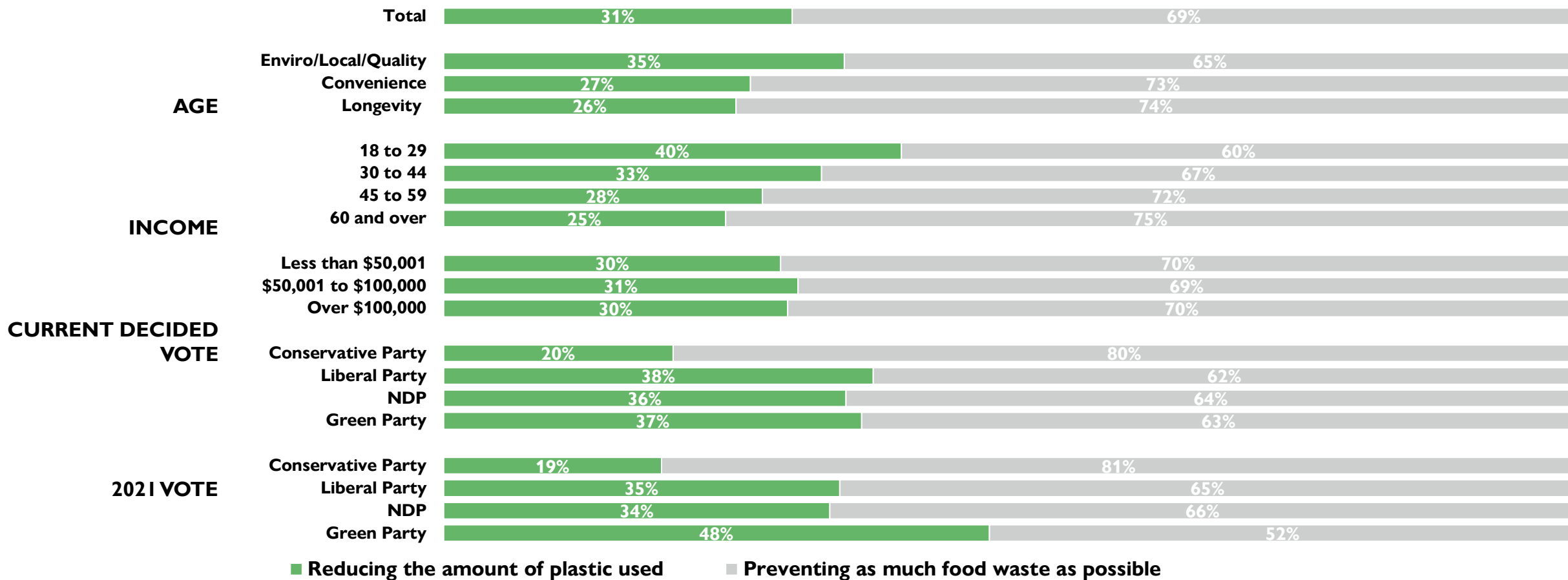
Base: All (n=1,500)





What is more important to you?

# REDUCE PLASTIC USED VS. PREVENT FOOD WASTE



Base: All (n=1,500)

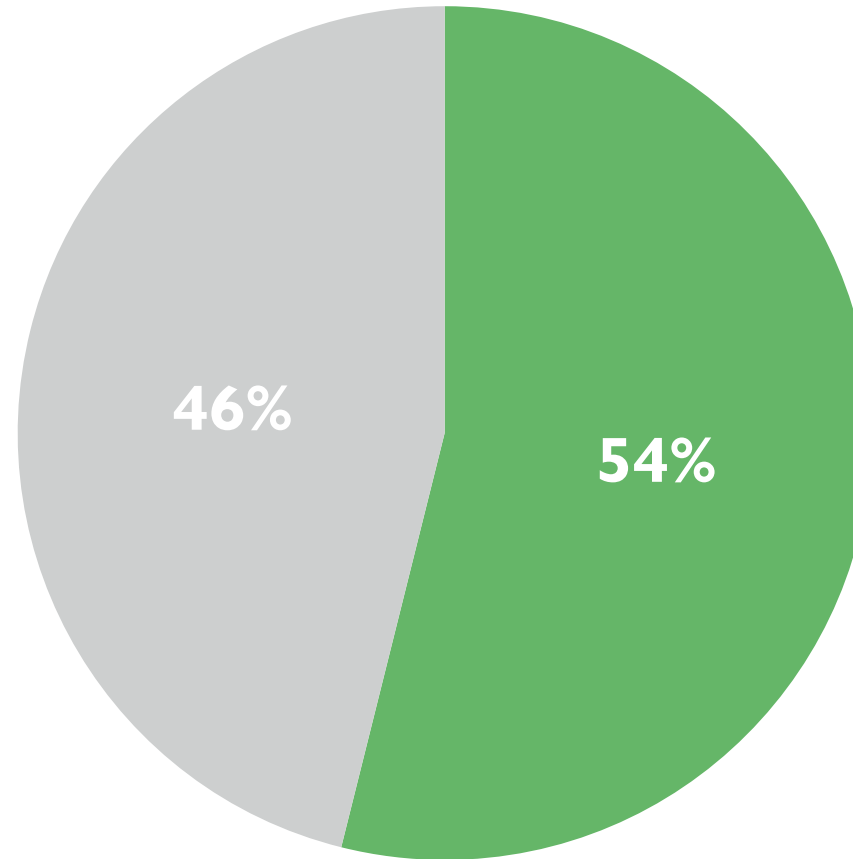




What is WORSE in your mind?

## ELIMINATE NON-RECYCABLE PLASTIC VS. REPLACE PACKAGING WITH OTHER NON-PLASTIC RECYCLABLES

- Eliminating single use and non-recyclable plastics but allowing recyclable plastic to still be used
- Replacing plastic packaging with other types of non-plastic packaging that cannot be recycled



Base: All (n=1,500)

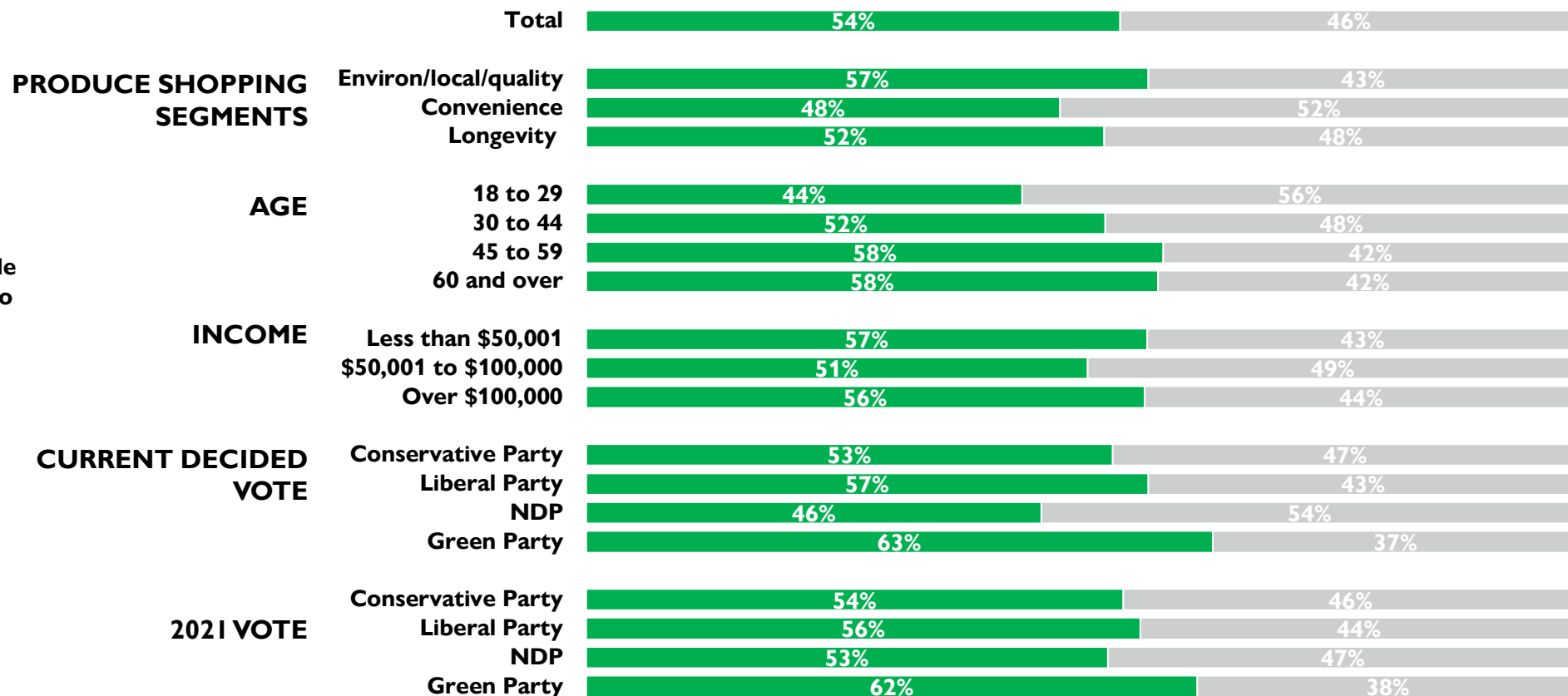


What is WORSE in your mind?

# ELIMINATE NON-RECYCABLE PLASTIC VS. REPLACE PACKAGING WITH OTHER NON-PLASTIC RECYCLABLES

■ Eliminating single use and non-recyclable plastics but allowing recyclable plastic to still be used

■ Replacing plastic packaging with other types of non-plastic packaging that cannot be recycled

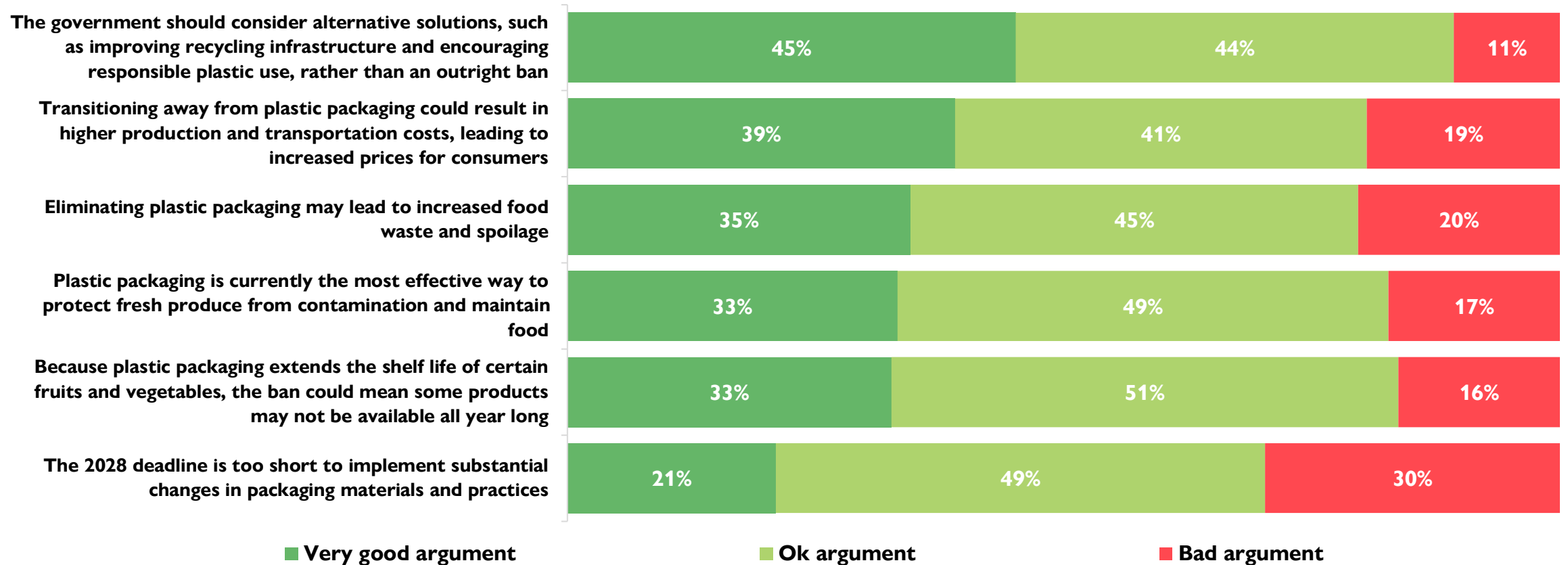


Base: All (n=1,500)



In response to the government's plan to eliminate 95% of plastic packaging used for fresh produce, the companies that grow, package, and ship fresh produce believe the 2028 deadline is too short. Below are some arguments the fresh produce sector has made against the government's plan. For each, tell us whether you think it is a very good argument, an ok argument, or a bad argument.

## 89% of Canadians support the argument that the government should explore alternative solutions, rather than an outright ban on plastic packaging, while 80% support the argument that transitioning away from plastic packaging could result in higher costs.

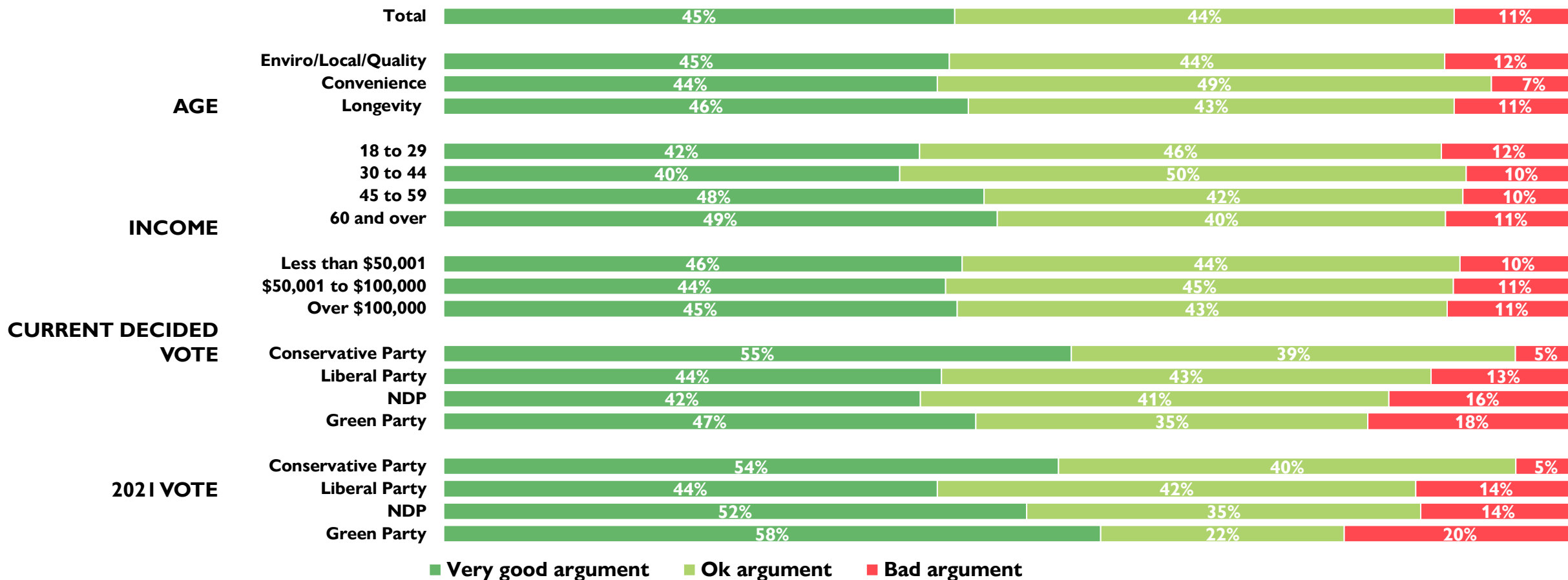


Base: All (n=1,500)



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## GOVERNMENT SHOULD CONSIDER ALTERNATIVE SOLUTIONS RATHER THAN AN OUTRIGHT BAN ON PLASTIC PACKAGING

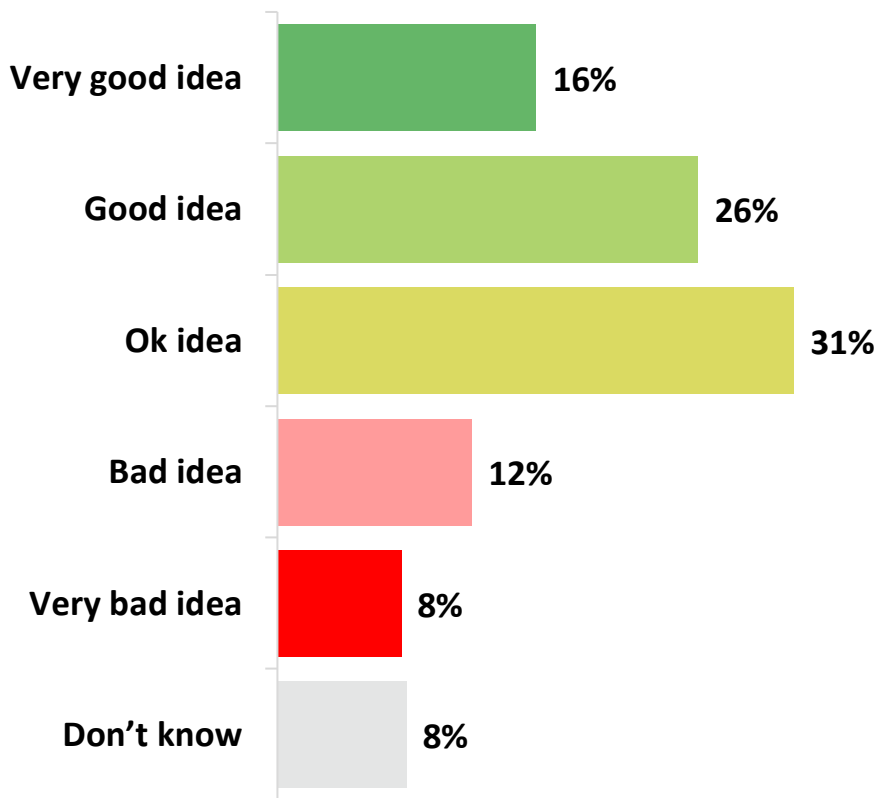


Base: All (n=1,500)



Based on what you have heard, do you think this proposal to eliminate most plastic packaging for fresh produce by 2028 is a good idea or a bad idea?

## After hearing the arguments, only 16% of Canadians strongly support the proposal to eliminate most plastic packaging for fresh produce by 2028

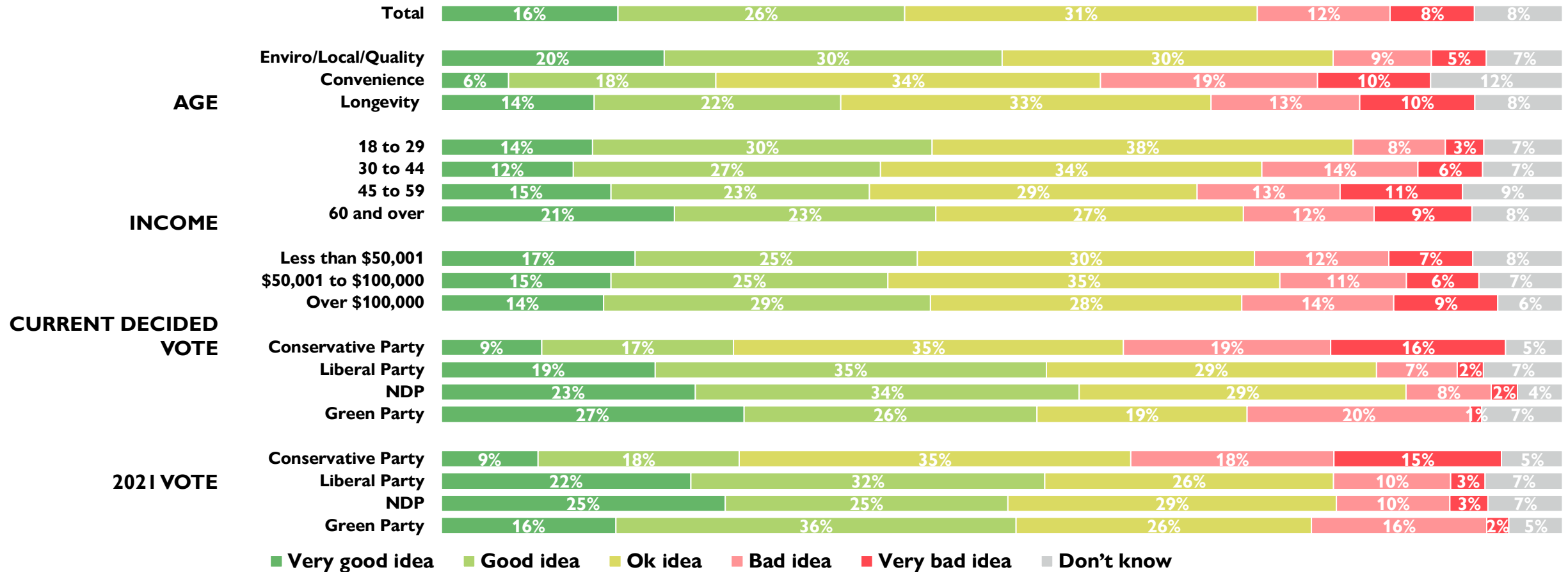


Base: All (n=1,500)



Based on what you have heard, do you think this proposal to eliminate most plastic packaging for fresh produce by 2028 is a good idea or a bad idea?

# SUPPORT FOR GOVERNMENT PROPOSAL AFTER INDUSTRY ARGUMENTS



Base: All (n=1,500)

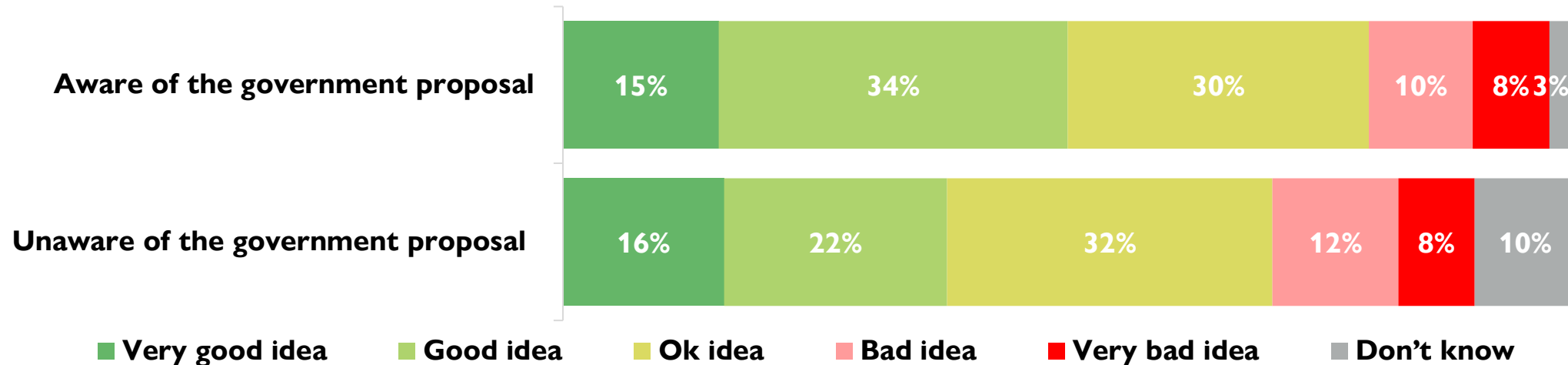
# After viewing the arguments made against the government's plan by the fresh produce sector, support for the eliminate most plastic packaging for fresh produce by 2028 weakens.

	Before Arguments	After Arguments	Variation	
Very good idea	25%	16%	-9	-10 Believe it is a good/very good idea
Good idea	27%	26%	-1	
Ok idea	28%	31%	+3	
Bad idea	7%	12%	+5	+9 Believe it is a bad/very bad idea
Very bad idea	4%	8%	+4	
Don't know	10%	8%	-2	



Based on what you have heard, do you think this proposal to eliminate most plastic packaging for fresh produce by 2028 is a good idea or a bad idea?

**After hearing arguments against the government's plan, both those who were previously aware and unaware of the proposal showed a decline in strong support (24% to 15% for the informed group and 25% to 16% for the uninformed group).**



Base: All (n=1,500)



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**Thank You**