abacus data

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

COST OF LIVING IS TOP OF MIND AMONG CANADIANS	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.
AFFORDABILITY OF PRODUCE IS ESSENTIAL	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%.
PLASTIC PACKING IS NOT TOP OF MIND WHILE SHOPPING	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.
PRODUCT CONSIDERATIONS LARGELY REVOLVE AROUND COST	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.
(23)	DO NOT SACRIFICE PLASTIC PACKAGING FOR OTHER NON-RECYLABLE 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 preferrable. 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 are accessible, over a complete substitution of plastic packaging with non-plastic alternatives that lack recyclability.

Key Insights – Perceptions of the Government Proposal

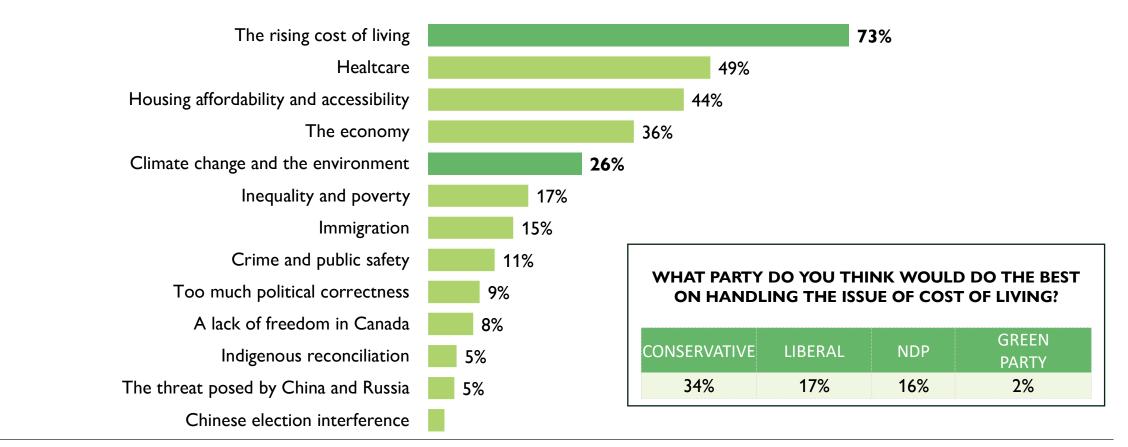
AWARENESS OF THE GOVERNMENTS PROPOSAL	The findings underscore a remarkable lack of awareness concerning the proposal to eliminate (at least) 95% of plastic packaging used for produce in grocery stores, with fewer than 1 in 3 Canadians acknowledging their knowledge of this initiative (29% aware). This 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





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



Base: All (n=1,500)

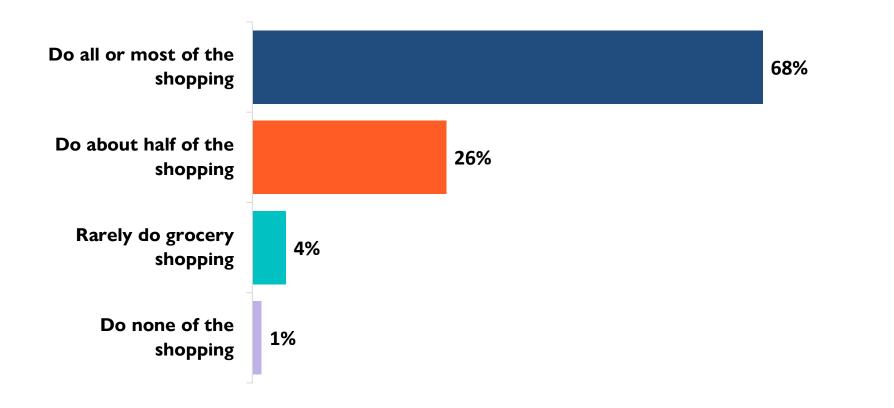
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Issues of Importance





ROLE PLAYED IN GROCERY SHOPPING FOR THE HOUSEHOLD



Base: All (n=1,500)

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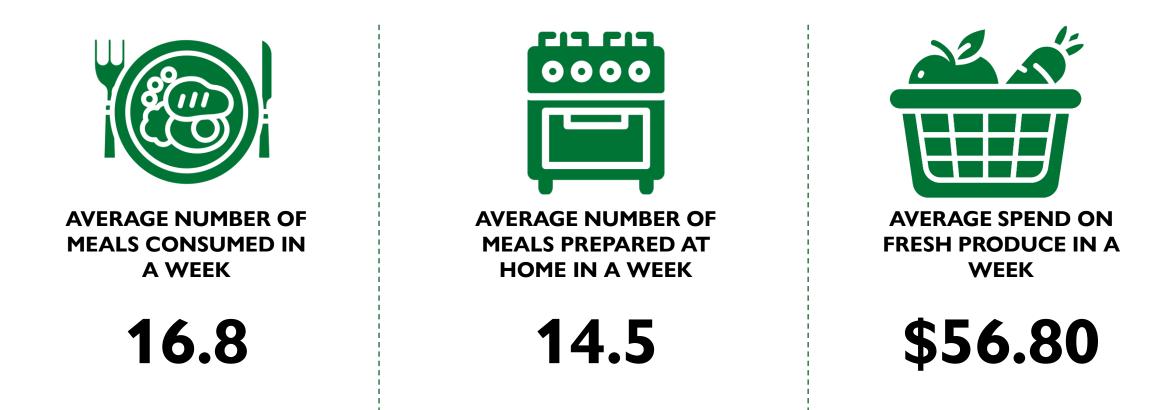


In a typical week, how many meals do you eat?

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

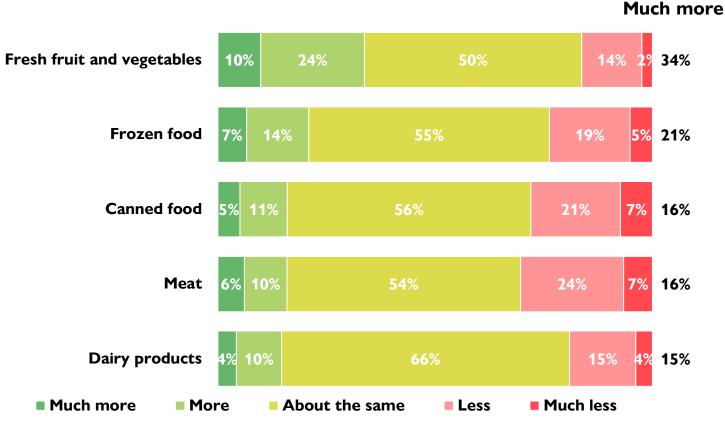
In a typical week, about how much do you spend buying fresh produce, like fruits and vegetables from a grocery store or market?

AVERAGE MEALS CONSUMED IN A WEEK





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



More +

Base: All (n=1.500)

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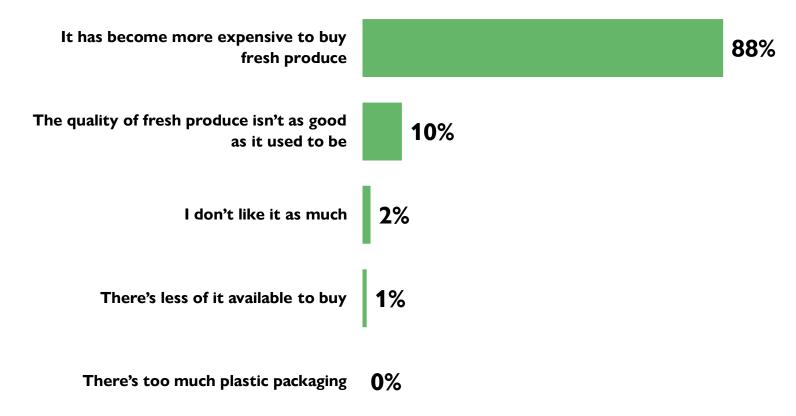
CONSUMPTION OF FRUIT AND VEGETABLES COMPARED TO TWO YEARS AGO

Total	10%	24%	50%	14% 2%
Enviro/Local/Quality	13%	29%	47%	10% 2%
Convenience	5%	24%	48%	20% 2%
AGE Longevity	8%	17%	54%	17% 4%
18 to 29	16%	29%	43%	11% 1
30 to 44	11%	23%	50%	13% 3%
45 to 59	8%	21%	50%	17% 5%
60 and aver	6 %	24%	55%	14%
INCOME	0/0	24/0	33 //	
Less than \$50,001	10%	20%	49%	17% 4%
\$50,001 to \$100,000	8%	20%	50%	
Over \$100,000	11%	23%	54%	11% 2%
CURRENT DECIDED	00/	2 40/		4.40/
VOTE Conservative Party	9%	24%	50%	14% 3%
Liberal Party	13%	24%	49%	12% 2%
NDP	12%	26%	44%	15% 3%
Green Party	7%	40%	44%	7% 2%
Conservative Party	9%	24%	52%	11% 3%
2021 VOTE Liberal Party	10%	26%	48%	14% <mark>2</mark> %
NDP	5%	33%	44%	15% 3%
Green Party	7%	35%	54%	4%0
Muck	mara Mara	About the come		
Much	more More	About the same	Less Much less	

Base: All (n=1.500)

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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

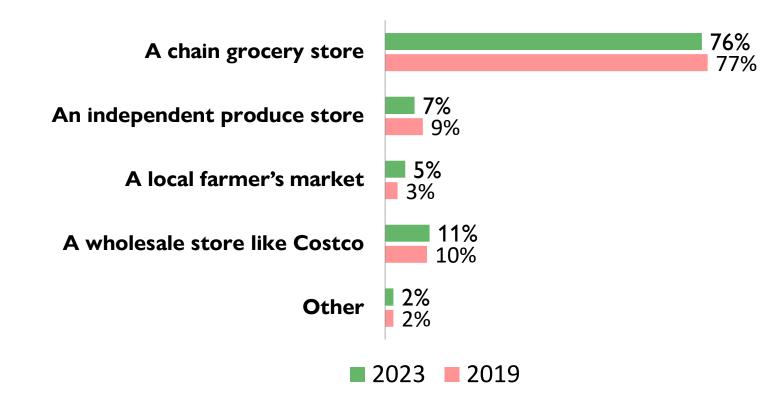


Base: Those who indicated they are eating less or much less fresh produce than 2 years ago (n=258)



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



Base: All (n=1,500)

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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%

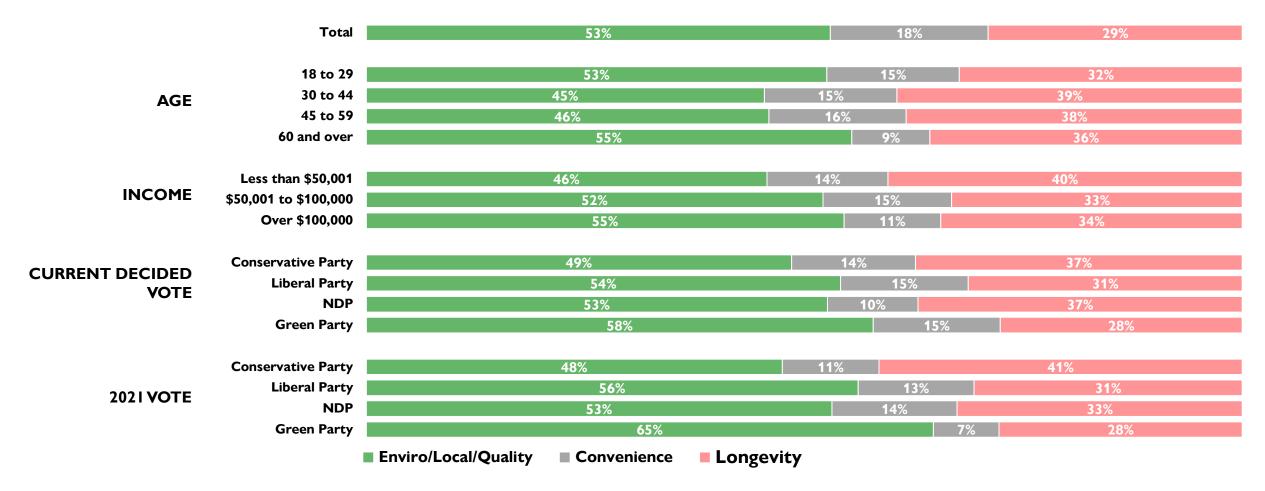
(-8 vs. 2019)

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



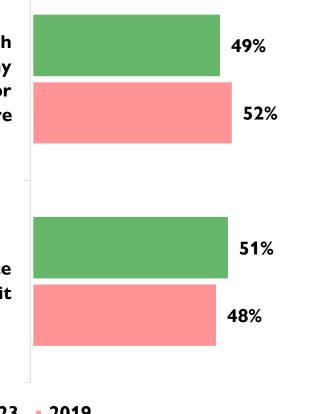
Base: All (n=1,500)

LONGEVITY

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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

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



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.

2023 2019

LONGEVITY

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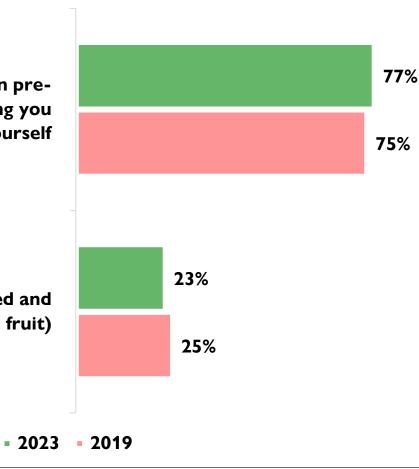
		Total	51%	49%
	PRODUCE SHOPPING	Environ/local/quality	48%	52%
	SEGMENTS	Convenience	63%	37%
		Longevity	50%	50%
	AGE	18 to 29	47%	53%
Usually buys small amounts of fresh	AGE	30 to 44	55%	45%
produce and eats it quickly after buying		45 to 59	52%	48%
		60 and over	48%	52%
	INCOME	Less than \$50,001	51%	49%
		\$50,001 to \$100,000	53%	47%
Usually buys larger amounts of fresh produce that will be consumed over		Over \$100,000	47%	53%
many days, and therefore needs to stay	CURRENT DECIDED	Conservative Party	46%	54%
fresh for up to a week or more	VOTE	Liberal Party	52%	48%
·	VOIE	NDP	47%	53%
		Green Party	54%	46%
		Conservative Party	48%	52%
	2021 VOTE	Liberal Party	50%	50%
		NDP	51%	49%
		Green Party	62%	38%

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CONVENIENCE

Likes to buy produce that has not been preprepared 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)

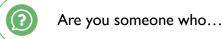


Consistent with the trends observed in 2019, an overwhelming three out of every four Canadians continue to place a higher priority on choosing unprepared produce as opposed to pre-washed and ready-to-eat options.

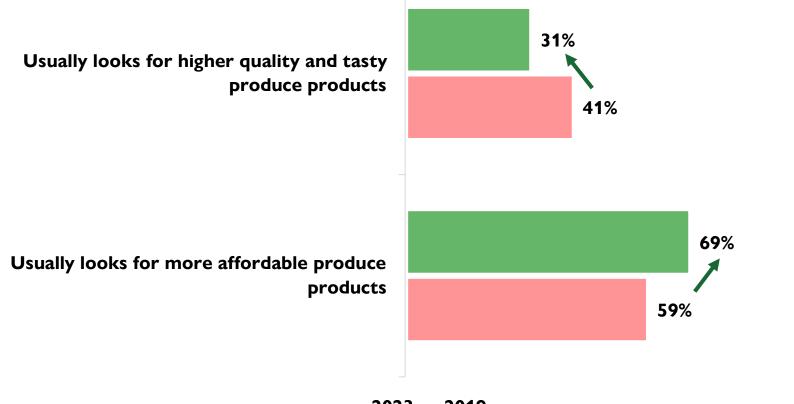


CONVENIENCE

		Total	23%	77%	
	PRODUCE SHOPPING SEGMENTS	Environ/local/quality Convenience Longevity	19%	81% 100% 100%	0
Likes to buy produce that is pre-washed and ready to eat (like a salad kit or pre- cut fruit)		18 to 29 30 to 44 45 to 59 60 and over	28% 25% 26% 15%	72% 75% 74% 85%	
Likes to buy produce that has not been pre-prepared in any way, therefore	INCOME	Less than \$50,001 \$50,001 to \$100,000 Over \$100,000	24% 25% 21%	76% 75% 79%	
requiring you to wash and prepare yourself	CURRENT DECIDED VOTE	Conservative Party Liberal Party NDP Green Party	22% 27% 23% 38%	78% 73% 77% 62%	
	2021 VOTE	Conservative Party Liberal Party NDP Green Party	17% 26% 21% 36%	83% 74% 79% 64%	

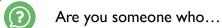


AFFORDABILITY VS. QUALITY / TASTE



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.

2023 2019



AFFORDABILITY VS. QUALITY / TASTE

		Total	69%	31%
	PRODUCE SHOPPING SEGMENTS	Environ/local/quality Convenience	45% 77%	55%
	SEGMENTS	Longevity	100%	0
	AGE	18 to 29	61%	39%
		30 to 44 📃	68%	32%
Usually looks for more affordable		45 to 59 🗾	72%	28%
produce products		60 and over	73%	27%
	INCOME	Less than \$50,001 📃	79%	21%
		\$50,001 to \$100,000	66%	34%
		Over \$100,000 📃	57%	43%
Usually looks for higher quality and tast	Ý			
produce products	CURRENT DECIDED	Conservative Party	65%	35%
	VOTE	Liberal Party 📃	67%	33%
		NDP	67%	33%
		Green Party	76%	24%
		Conservative Party	73%	27%
	2021 VOTE	Liberal Party 📃	65%	35%
		NDP	68%	32%
		Green Party 📃	72%	28%

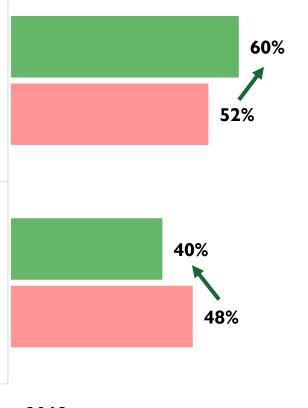




LIMIT USE OF PLASTICS

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





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 longerterm environmental considerations.

2023 2019

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LIMIT USE OF PLASTICS

		Total	40%		60%
	PRODUCE SHOPPING SEGMENTS	Environ/local/quality Convenience	58%	100%	42%
	SEGMENTS	Longevity	30%		70%
	AGE	18 to 29	41%		59%
Tries not to buy produce products that		30 to 44 45 to 59	<u> </u>		63% 65%
come in plastic packaging or other single-use packaging		60 and over	47%		53%
	INCOME	Less than \$50,001	42%		58%
		\$50,001 to \$100,000	38%		62%
Doesn't usually think too much about		Over \$100,000	43%		57%
the type of packaging the produce come in	S CURRENT DECIDED	Conservative Party	33%		67%
	VOTE	Liberal Party	43%		57%
		NDP Green Party	<u> </u>		46% 45%
		Green raity	55/6		
		Conservative Party	37%		63%
	2021 VOTE	Liberal Party	43%		57%
		NDP Green Party	55%	69 %	45%
		Green Party		07/0	51%

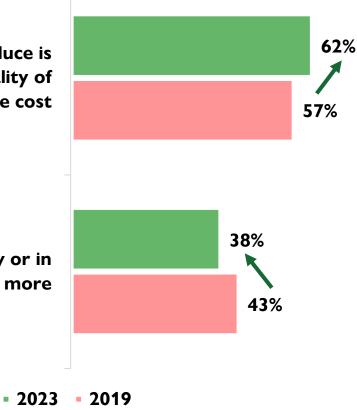


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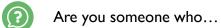
LOCALLY GROWN

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

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



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.



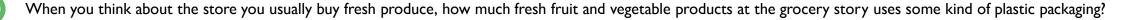
LOCALLY GROWN

		Total	38%	62%	
	PRODUCE SHOPPING SEGMENTS	Environ/local/quality Convenience	16%	72% 84%	28%
		Longevity	%	100%	
	AGE	18 to 29 30 to 44	34% 32%	66% 68%	
Usually looks for produce grown locally or in Canada even if it costs a bit more		45 to 59 60 and over	39% 45%	61% 55%	6
	INCOME	Less than \$50,001	37%	63%	
		\$50,001 to \$100,000 Over \$100,000	41% 37%	59%	
Doesn't really care where the produce is grown but cares more about the quality of the product or the cost		Conservative Party	37%	63%	
		Liberal Party NDP	40% 37%	60% 63%	
		Green Party	44%	56%	
		Conservative Party	37%	63%	
	2021 VOTE	Liberal Party NDP	44% 41%	56% 59%	
		Green Party	43%	57%	

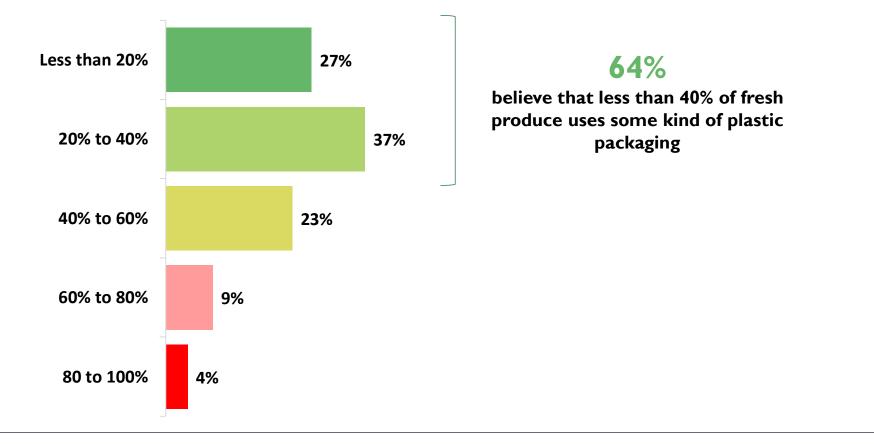
Perceptions on Plastic Packaging







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)

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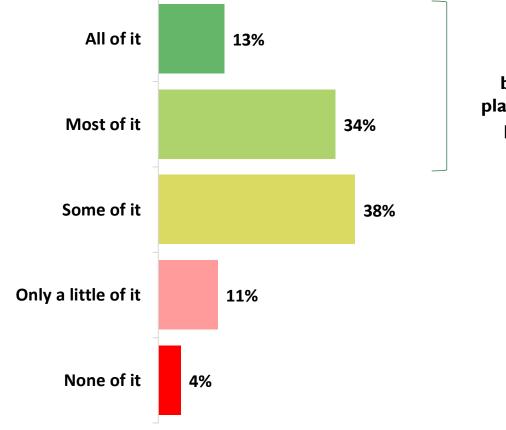
AWARENESS OF PLASTIC PACKAGING USED FOR PRODUCE

	Total	27%	37%	23%	9% 4%
	Enviro/Local/Quality	28%	40%	22%	8% 3%
	Convenience	19%	38%	28%	9% 5%
AGE	Longevity	28%	32%	24%	10% 6%
	18 to 29	14%	43%	29%	10% 5%
	30 to 44	24%	37%	25%	9% 5%
	45 to 59	29%	33%	23%	9% 5%
	60 and over	36%	35%		7% 3%
INCOME		30%	33 /0	7/0	
	Less than \$50,001	29%	35%	23%	9% 4%
	\$50,001 to \$100,000 📃	27%	38%	25%	7% 3%
	Over \$100,000 📃	23%	40%	21%	9% 6%
CURRENT DECIDED					
VOTE	Conservative Party	28%	35%	21%	10% 6%
	Liberal Party	31%	38%	21%	5% 4%
	NDP	23%	41%	23%	11% 2%
	Green Party	18%	51%	23%	6% 19
	Conservative Party	20%	2.49/	22%	40º/ Fº/
	-	29%	34%	22%	10% 5%
2021 VOTE	Liberal Party	30%	37%	22%	6% 4%
	NDP	29%	41%	20%	10% 19
	Green Party	15%	59%	19%	7% 0
	Less than 20%	20% to 40% 40% to	60% = 60% to 80% = 80 to 1	00%	

Base: All (n=1,500)

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



47%

believe that most or all of the plastic packaging used in the fresh produce section is recyclable

Base: All (n=1,500)

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AMOUNT OF RECYCLABLE PLASTIC PACKAGING USED

	Total	13%	34%	38%	11% 4%
	Enviro/Local/Quality	15%	36%	35%	11% 3%
	Convenience	9%	34%	43%	10% 3%
AGE	Longevity	10%	31%	40%	13% 6%
	18 to 29	8%	39%	38%	10% 5%
	30 to 44	17%	31%	41%	8% 3%
	45 to 59	11%	34%	38%	13% 4%
INCOME	60 and over	13%	33%	34%	14% 5%
	Less than \$50,001	13%	35%	38%	10% 4%
	\$50,001 to \$100,000	14%	36%	34%	13% 4%
	Over \$100,000	12%	30%	44%	11% 3%
CURRENT DECIDED					
νοτε	Conservative Party	15%	34%	36%	11% 3%
	Liberal Party	13%	37%	33%	13% 5%
	NDP	10%	29%	42%	15% 4%
	Green Party	8%	32%	46%	9% 6%
	Conservative Party	11%	33%	36%	16% 4%
2021 VOTE	Liberal Party	12%	35%	39%	11% 3%
	NDP	7%	30%	45%	12% 6%
	Green Party	8%	34%	34%	15% 10%
	All of it	Most of it	Some of it Only a little of	it None of it	

Base: All (n=1,500)

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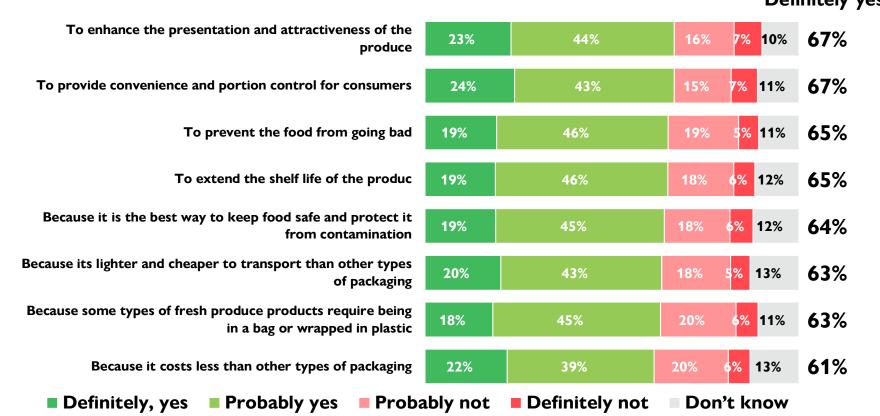


Plastic packaging is used for some fresh fruit and vegetables for various reasons. For each of the following, please tell me whether you think it is a major reason, minor reason, or not a reason.

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.

Because some types of fresh produce products require being in a bag or wrapped in plastic to extend their shelf life/prevent damage in transport	51%	37%	12%
Because it is the best way to keep food safe and protect it from contamination	51%	37%	13%
To prevent the food from going bad	48%	35%	17%
To extend the shelf life of the produce	46%	38%	16%
Because it costs less than other types of packaging	42%	36%	22%
Because its lighter and cheaper to transport than other types of packaging	41%	39%	20%
To provide convenience and portion control for consumers	33%	42%	25%
To enhance the presentation and attractiveness of the produce	29%	42%	28%
Major reason	nor reason	Not a reason	

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



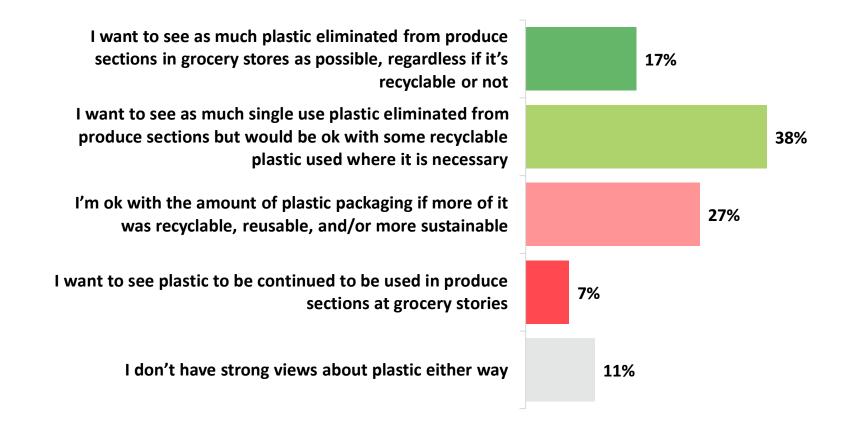
Probably yes + Definitely yes

Base: All (n=1,500)

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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.



PERCEPTION OF THE ELIMINATION OF PLASTIC PACKAGING

	Total	17%	38%	27%	7% 11%
PRODUCE SHOPPING	Environ/local/quality	21%	42%	249	
 SEGMENTS I want to see as much plastic eliminated from 	Convenience Longevity	11% 15%	<u>27%</u> 36%	4% 10 29%	0% 18% 6% 15%
produce sections in grocery stores as possible,	18 to 29	20%	33%	27%	7% 13%
	30 to 44 45 to 59	17% 15%	39% 36%	25% 26%	5% 13% 9% 14%
I want to see as much single use plastic eliminated from produce sections but would be	60 and over	18%	41%	30%	6% 5%
ok with some recyclable plastic used where it INCOME is necessary	Less than \$50,001 \$50,001 to \$100,000	16% 19%	<u>35%</u> 40%	28%	8% 1 3% 6% 8 %
I'm ok with the amount of plastic packaging if more of it was recyclable, reusable, and/or	Over \$100,000	18%	40% 41%	25%	6% 8%
more sustainable CURRENT DECIDED	Conservative Party Liberal Party	13%	34%	30%	8% 15% % 6% 4%
I want to see plastic to be continued to be VOTE used in produce sections at grocery stories	NDP	18% 25%	44% 42%	27	23% 7% 4%
	Green Party	32%	38%		23% 1%5%
I don't have strong views about plastic either way 2021 VOTE	Conservative Party Liberal Party	15% 19%	<u>35%</u> 45%	32%	8% 10% 7% 5% 4%
way 2021 VOTE	NDP Green Party	20%	45% 45%		27% 4% 4% 19% 0%7%

Base: All (n=1,500)

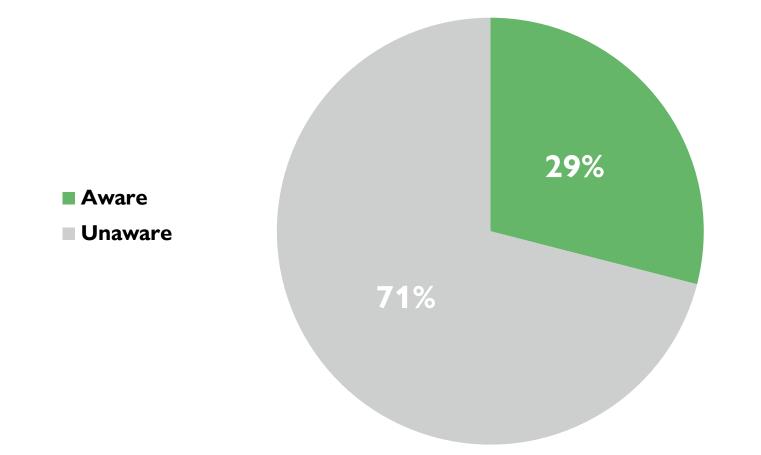
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Perceptions of the Government Proposal to Achieve 95% Plastic-Free Packaging





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



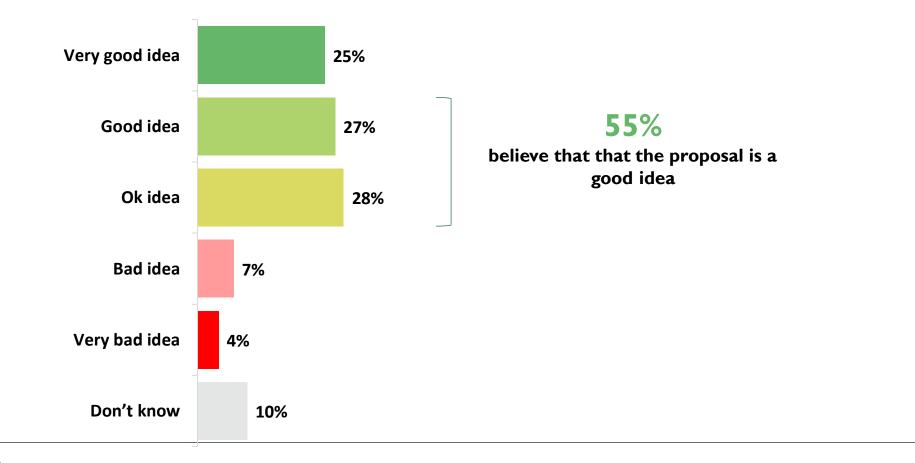
AWARENESS OF THE GOVERNMENT PROPOSAL TO ELIMINATE PLASTICS

	Total	29%	71%
	Enviro/Local/Quality	34%	66%
	Convenience	24%	76%
AGE	Longevity	23%	77%
	18 to 29	2.49/	66%
	30 to 44	34%	
		33%	67%
	45 to 59	26%	/4%
INCOME	60 and over	24%	76%
	Less than \$50,001	28%	72%
	\$50,001 to \$100,000	28%	72%
	Over \$100,000	32%	68%
CURRENT DECIDED			
VOTE	Conservative Party	33%	67%
	Liberal Party	34%	66%
	NDP	32%	68%
	Green Party	34%	66%
	Conservative Party	31%	69%
2021 VOTE	Liberal Party	32%	68%
	NDP	31%	69%
	Green Party	39%	61%
		Aware Una	aware

Base: All (n=1,500

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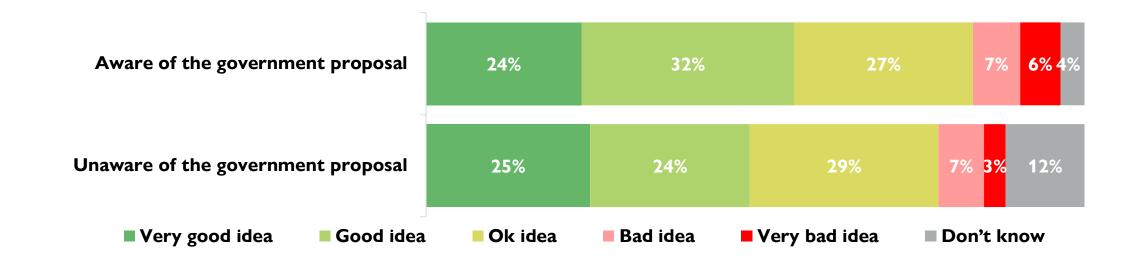
1 in 4 Canadians strongly support this idea, while slightly over 1 in 2 feel that it is a good idea.



Base: All (n=1,500)

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





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



SUPPORT FOR THE GOVERNMENT PROPOSAL

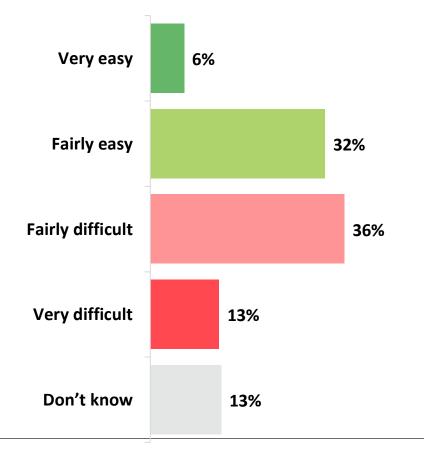
	Total	25%		27%		28%	7%	4% 10%
	Enviro/Local/Quality	29 %		28%		27%	6%	6 3% 8%
	Convenience	16%	24%	2070	30%	10		13%
AGE	Longevity	22%	25	%	30		7% 5	% 11%
	3 , 1							
	18 to 29	25%		27%		36%		3%1% 9%
	30 to 44	21%		81%		28%	6% 4	10%
	45 to 59	23%	24	1%	25%		10% 5%	13%
INCOME	60 and over	29%		25%		26%	8%	5% 7%
INCOME								
	Less than \$50,001	25%		26%		27%	6% 49	<mark>% 11%</mark>
	\$50,001 to \$100,000	25%		29 %		29%	7	
	Over \$100,000	25%		24%		29%	8%	5% 8%
CURRENT DECIDED								
VOTE	Conservative Party	15%	24%		33%		12%	7% 8%
	Liberal Party	33%		33%			24%	3% % 7%
	NDP	31%		31%		26	%	5% 1% 6%
	Green Party	31%		28%		21%	8%	0% 12%
	Concernations Doutes	4.40/	82 0/		2.40/		4.40/	
	Conservative Party	14%	23%	229/	34%		14%	8% 7%
2021 VOTE	Liberal Party NDP	32%		32%				4% 1% 7%
	Green Party	<u> </u>		<u>32%</u>		<u>24%</u> 29%	79	% <mark>2%</mark> 7% 4%0% 7%
	Green Farty	30%		24%		297	0	4 /0U / 0 / /0
	Very good idea	Good idea Ok ide	ea 🛛 🗖 Bad idea	Very bad idea	u 🛛 Don't kn	wo		

Base: All (n=1,500)

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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.

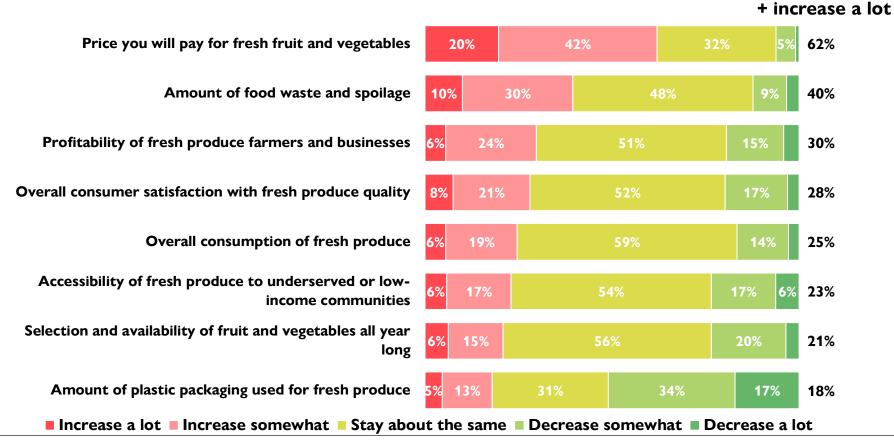


LEVEL OF DIFFICULTY TO ACHIEVE THE GOAL OF 95% PLASTIC-FREE PACKAGING

	Total	6%	32%		36%		3%	13%
	Enviro/Local/Quality	8%	36%		33%		12%	11%
	Convenience		23%		39% 13%		219	%
AGE	Longevity	4%	30%		39%	1	4%	13%
	18 to 29	5%	38%		38%		7%	12%
	30 to 44	7%	38%		31%		10%	13%
	45 to 59	5%	30%		35%	16 %		14%
INCOME	60 and over	7%	27%		38%	15	%	13%
	Less than \$50,001	5%	32%		36%	12%		15%
	\$50,001 to \$100,000	7%	33%		36%		11%	13%
	Over \$100,000	7%	31%		36%		16%	9%
CURRENT DECIDED								
νοτε	Conservative Party	4%	29%		43%		17%	7%
	, Liberal Party	11%	36%			3%	8%	12%
	NDP	7%	40%		31%		11%	10%
	Green Party	10%	42%	/ 0		32%		% 3%
	Company time Douter		200/		400/		840/	
	Conservative Party	5%	28%		40%		21%	6%
2021 VOTE	Liberal Party	9%	32%		35%		11%	13%
	NDP	8%	41%			34%	5%	12%
	Green Party	11%		51%		19%	16%	3%
	Very eas	y 🗧 Fairly easy	Fairly difficult	Very difficul	t 🛛 Don't know			



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.



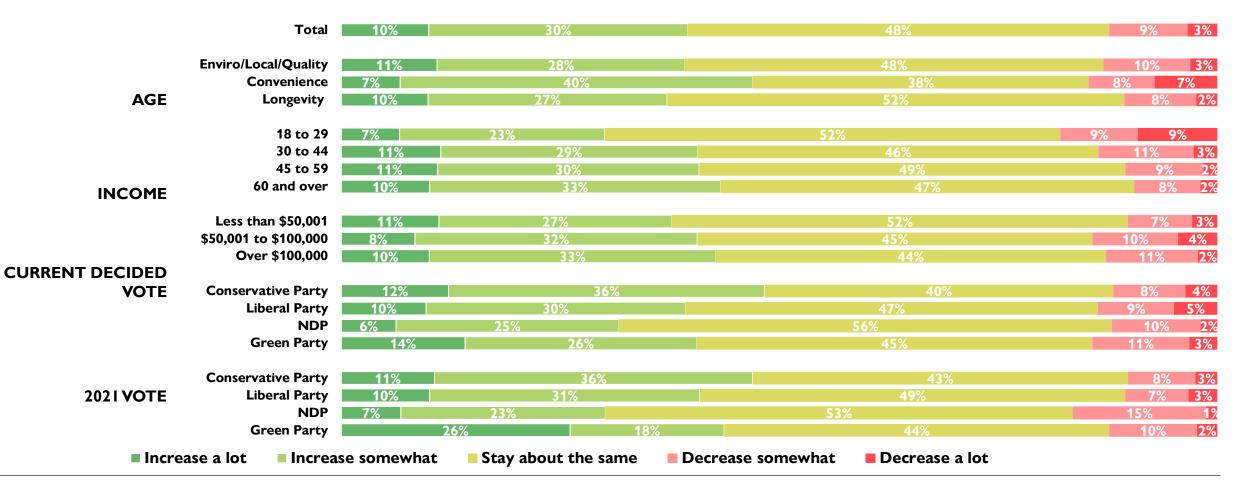
IMPACT ON THE PRICE YOU WILL PAY FOR FRESH FRUIT AND VEGETABLES

	Total	20%	42%	32%	5% 1%
	Enviro/Local/Quality	18%	44%	32%	5% 1%
	Convenience	19%	46%	30%	5% 0 9
AGE	Longevity	22%	40%	33%	5% 1
	18 to 29	16%	42%	34%	6% 1%
	30 to 44	19%	41%	32%	8% 19
	45 to 59	24%	39%	31%	4% 1%
INCOME	60 and over	19%	46%	31%	3%19
	Less than \$50,001	20%	41%	34%	4% 2%
	\$50,001 to \$100,000	18%	43%	31%	7% 0
	Over \$100,000	21%	47%	28%	3%1%
CURRENT DECIDED					
νοτε	Conservative Party	26%	42%	27%	4% 1%
	Liberal Party	13%	45%	36%	6% 0
	NDP	17%	44%	32%	7% 1%
	Green Party	24%	48%	18%	<mark>8%</mark> 2%
	Conservative Party	26%	45%	23%	5% 1%
2021 VOTE	Liberal Party	15%	46%	33%	5% 0
	NDP	18%	46%	27%	7% 2%
	Green Party	16%	49%	27%	8% 0
<u>-</u>	-				
Incre	ase a lot 🛛 📕 Increase s	somewhat Stay	y about the same 🛛 🗖 Decrease somewhat 🛁 🗖	ecrease a lot	

Base: All (n=1,500) Note: Values less than 5% not shown.

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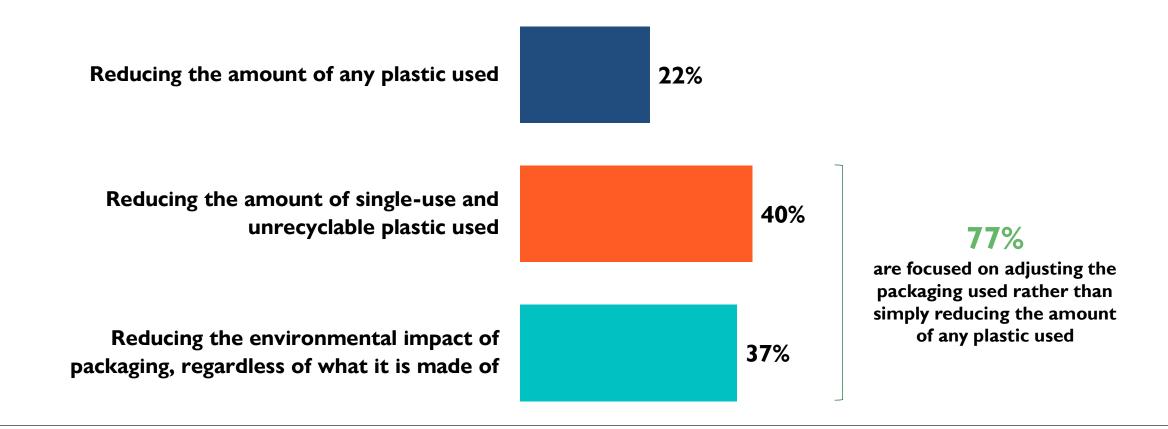
THE AMOUNT OF FOOD WASTE AND SPOILAGE



Base: All (n=1,500) Note: Values less than 5% not shown.



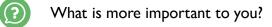
Only 1 in 5 Canadians prioritize general plastic reduction, while two in five lean towards reducing single-use and unrecyclable plastics, and one in three are more focused on minimizing the environmental impact of packaging



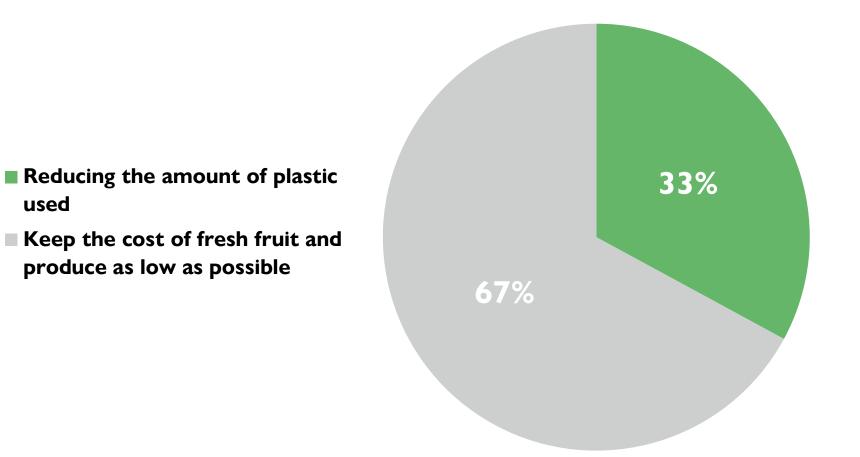
PERCEPTIONS AROUND THE REDUCTION OF PLASTIC PACKAGING

	Total	22%	40%	37%
PRODUCE SHOPPING	Environ/local/quality	27%	37%	36%
SEGMENTS	Convenience	17%	49%	34%
	Longevity	18%	41%	41%
	18 to 29	23%	34%	44%
AGE	30 to 44	23%	39%	38%
Reducing the amount of any plastic used	45 to 59	21%	44%	35%
	60 and over	23%	42%	35%
INCOME	Less than \$50,001	24%	38%	38%
Reducing the amount of single-use and	\$50,001 to \$100,000	22%	44%	34%
unrecyclable plastic used	Over \$100,000	21%	40%	39%
CURRENT DECIDED	Conservative Party	22%	47%	31%
Reduce the environmental impact of VOTE	Liberal Party	25%	35%	41%
packaging, regardless of what it is made of	NDP	23%	38%	40%
	Green Party	21%	30%	49 %
	Conservative Party	19%	50%	31%
2021 VOTE	Liberal Party	25%	37%	39%
	NDP	24%	34%	41%
	Green Party	22%	39%	40%
	-			

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REDUCE PLASTIC USED VS. KEEP COSTS DOWN



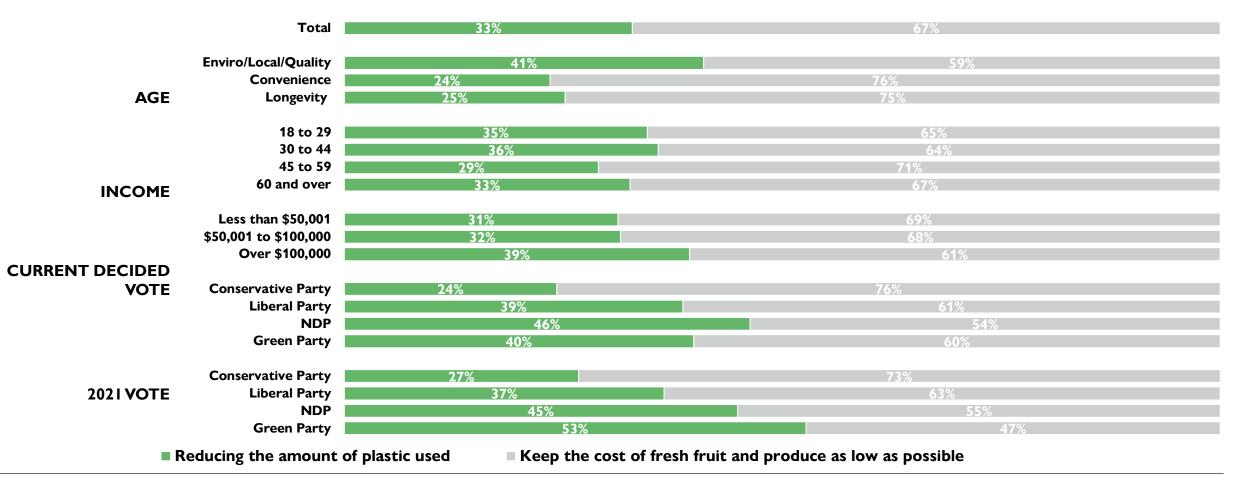
Base: All (n=1,500)

used



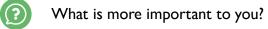
What is more important to you?

REDUCE PLASTIC USED VS. KEEP COSTS DOWN

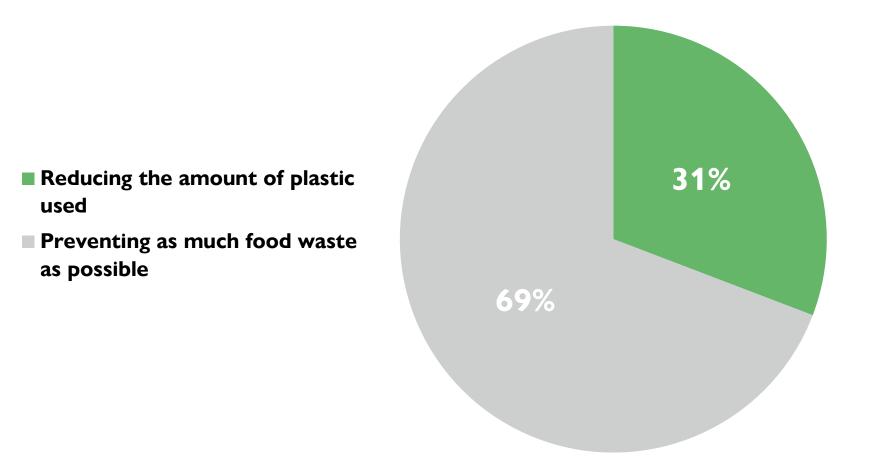


Base: All (n=1,500)

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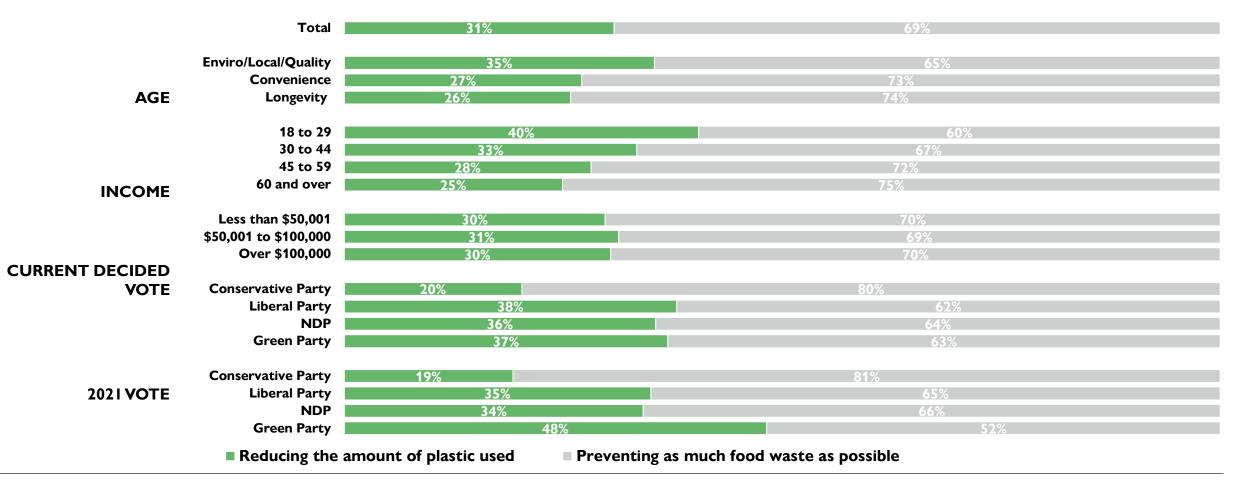
REDUCE PLASTIC USED VS. PREVENT FOOD WASTE





What is more important to you?

REDUCE PLASTIC USED VS. PREVENT FOOD WASTE



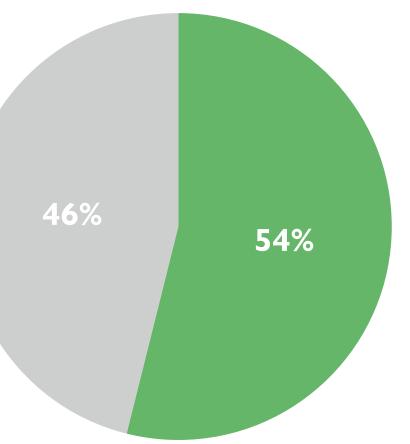
Base: All (n=1,500)

 $(\mathbf{?})$

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

Eliminating single use and nonrecyclable 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)

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

		Total 📕	54%	46%
F	PRODUCE SHOPPING SEGMENTS	Environ/local/quality Convenience Longevity	57% 48% 52%	43% 52% 48%
	AGE	18 to 29 30 to 44	44% 52%	56% 48%
Eliminating single use and non-recyclable plastics but allowing recyclable plastic to still be used	INCOME	45 to 59 60 and over	58% 58%	42% 42%
		Less than \$50,001 \$50,001 to \$100,000 Over \$100,000	57% 51% 56%	43% 49% 44%
Replacing plastic packaging with other types of non-plastic packaging that cannot be recycled	CURRENT DECIDED VOTE	Conservative Party Liberal Party NDP Green Party	53% 57% 46% 63%	47% 43% 54%
	2021 VOTE	Conservative Party Liberal Party NDP Green Party	54% 56% 53% 62%	46% 44% 47% 38%



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.

	Ok argume	nt 📕 Bad argun	hent
ial ces	21%	49%	30%
ain cts ong	33%	51%	16%
to ain od	33%	49%	17%
od Ige	35%	45%	20%
in to ers	39%	41%	19%
ich ing an	45%	44%	11%

The government should consider alternative solutions, such as improving recycling infrastructure and encouraging responsible plastic use, rather than an outright ban

Transitioning away from plastic packaging could result in higher production and transportation costs, leading to increased prices for consumers

Eliminating plastic packaging may lead to increased food waste and spoilage

Plastic packaging is currently the most effective way to protect fresh produce from contamination and maintain food

Because plastic packaging extends the shelf life of certain fruits and vegetables, the ban could mean some products may not be available all year long

The 2028 deadline is too short to implement substantial changes in packaging materials and practices

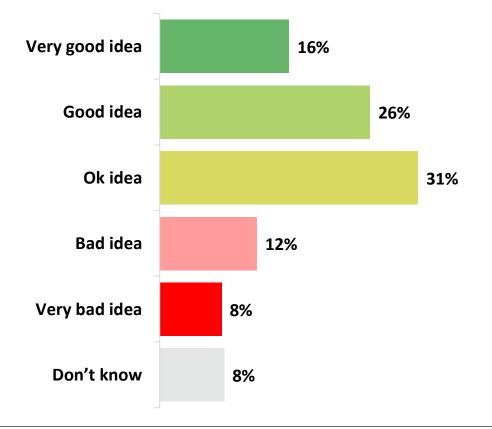
Very good argument

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.

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

	Total	45%	44%	11%
	Enviro/Local/Quality	45%	44%	12%
	Convenience	44%	49%	7%
AGE	Longevity	46%	43%	11%
	18 to 29	42%	46%	12%
	30 to 44	40%	50%	10%
	45 to 59	48%	42%	10%
INCOME	60 and over	49%	40%	11%
	Less than \$50,001	46%	44%	10%
	\$50,001 to \$100,000	44%	45%	11%
	Over \$100,000	45%	43%	11%
CURRENT DECIDED				
νοτε	Conservative Party	55%	39%	5%
	Liberal Party	44%	43%	13%
	NDP	42%	41%	16%
	Green Party	47%	35%	18%
	Conservative Party	54%	40%	5%
2021 VOTE	Liberal Party	44%	42%	14%
	NDP	52%	35%	14%
	Green Party	58%	22%	20%
		Very good argument 🛛 Ok argument 🗖 Bad argume	ent	

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)

SUPPORT FOR GOVERNMENT PROPOSAL AFTER INDUSTRY ARGUMENTS

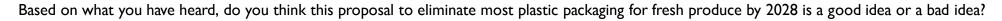
	Total	16%	26%		31%		12% 8	8%
	Enviro/Local/Quality	20%	30%		3	0%	9%	5% 7%
	Convenience	6% 18%		34%		19%	10%	12%
AGE	Longevity	14%	22%		33%	13%	10%	8 %
	18 to 29	14%	30%		38%		8%	3% 7%
	30 to 44	12%	27%		34%		14%	6% 7%
	45 to 59	15%	23%		29%	13%	11%	9%
	60 and over	21%	23%		27%	12	2% 99	6 8%
INCOME								
	Less than \$50,001	17%	25%		30%		12% 7	8%
	\$50,001 to \$100,000	15%	25%		35%			6% 7%
	Over \$100,000	14%	29%		28%		4%	9% 6%
CURRENT DECIDED					20/0			
VOTE	Conservative Party	9% 17%		35%		19%	169	6 5%
V012	Liberal Party	19%	35			29%	7%	
	NDP	23%		34%		29%		8% 2% 4%
	Green Party	27%		26%	19%		20%	1% 7%
		£1/0		2076			2076	
	Conservative Party	9% 18%		35%		18%	15%	6 5%
2021 VOTE	Liberal Party	22%		32%		26%	10%	3% 7%
2021 VOTE	NDP	25%		25%		29%	10%	3% 7%
	Green Party	16%	36%	2370		6 %	16%	2% 5%
						070	10/6	
	Very good idea	Good idea 🛛 🗖 Ok id	ea 🛛 🗖 Bad idea	Very bad ide	ea 🛛 🖉 Don't know	w		
	- 2			-				

Base: All (n=1,500)

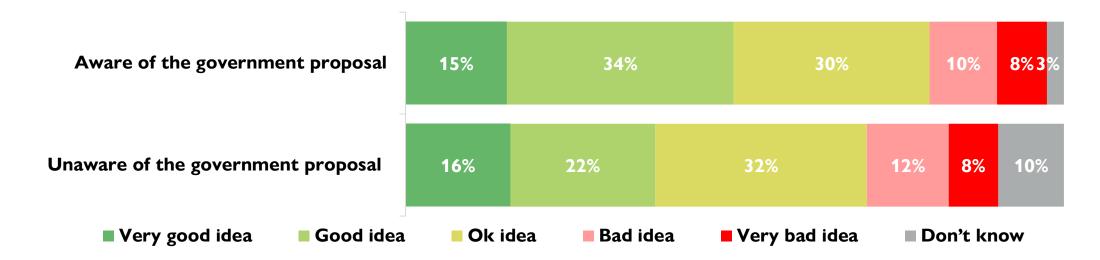
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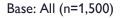
After viewing the arguments made against the government's plan by the fresh produce sector, support for the eliminate most plastic packaging for fresh produce by 2028 weakens.

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



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).









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Thank You