



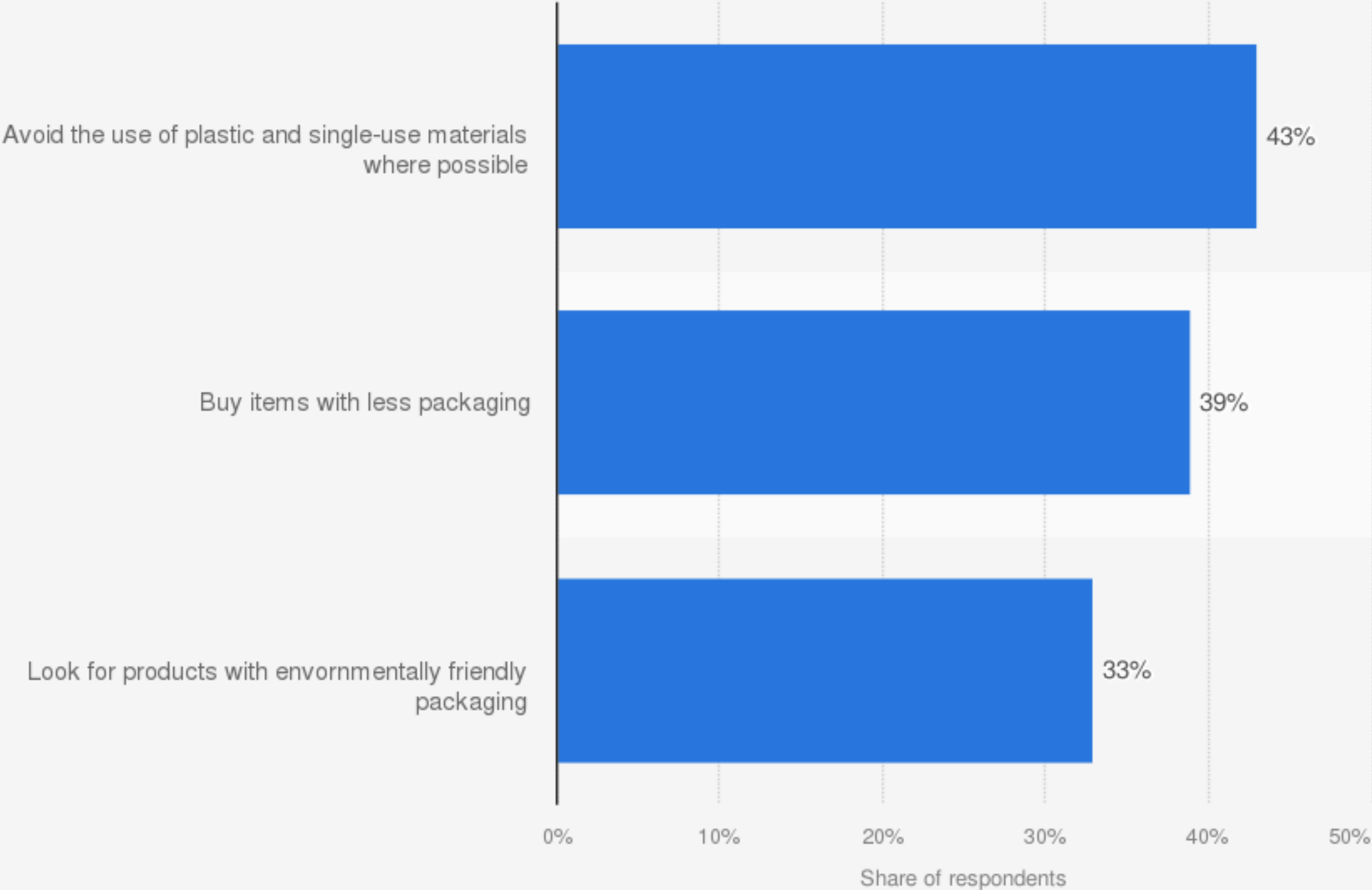
SUSTAINABLE PACKAGING

WHAT CONSUMERS REALLY WANT IN PACKAGING



SUSTAINABLE PACKING HAS BECOME INCREASINGLY POPULAR

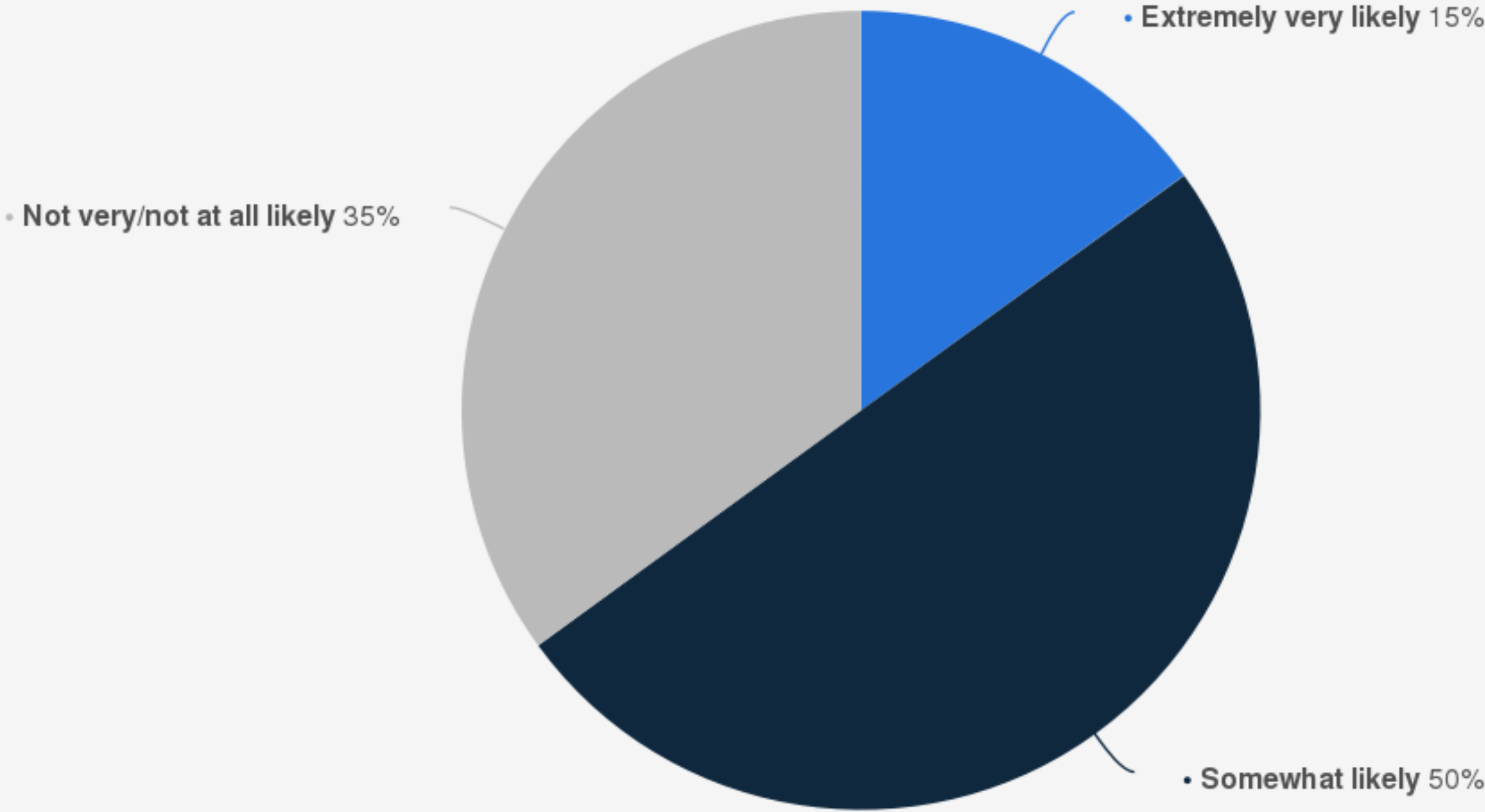
Share of consumers in Canada that shop for items with sustainable packaging during the holiday season in 2021, by method



Source
PwC
© Statista 2022

Additional Information:
Canada; PwC; Late August 2021; 1,160 respondents

Canadian consumers' likelihood to switch to a grocery store demonstrating stronger commitment to sustainability in 2022



2 OUT OF 3
CANADIANS
WOULD
CONSIDER
SWITCHING
GROCERY
STORES

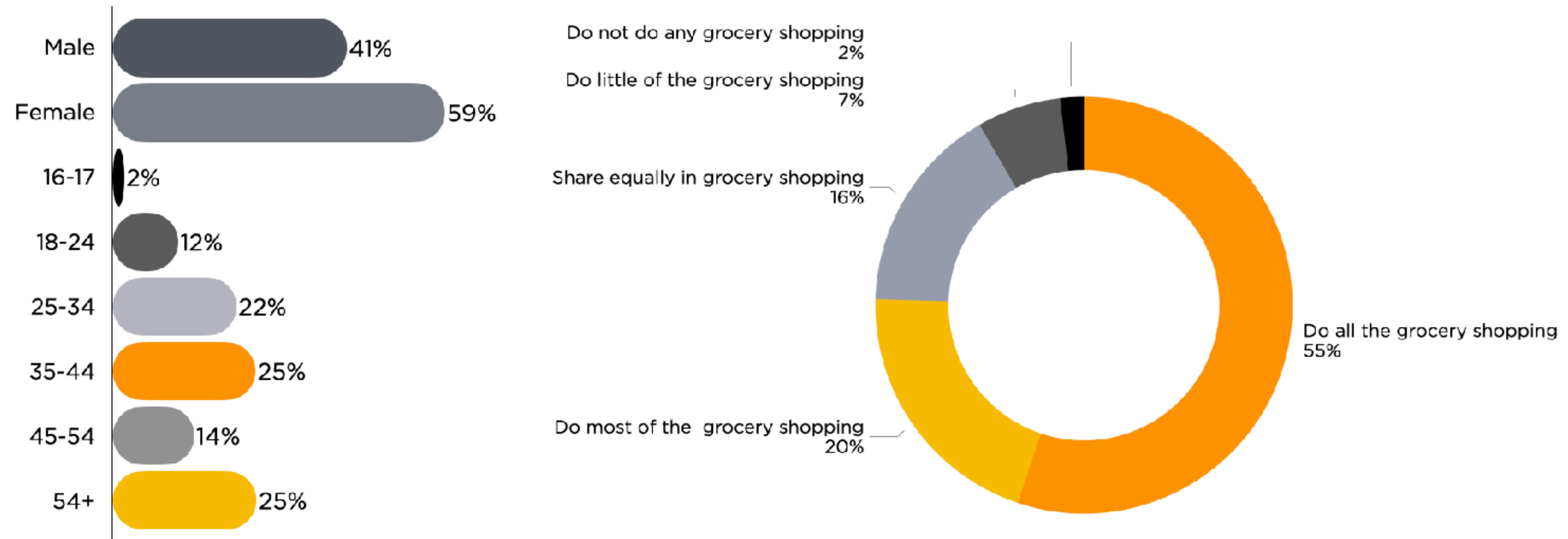
Sources
Canadian Grocer; EnsembleIQ
© Statista 2022

Additional Information:
Canada; EnsembleIQ; 2022; 1,000+; 18 years and older



**BUT CREATING
SUSTAINABLE
PACKAGING
HAS BECOME
INCREASINGLY
COMPLICATED**

WE ASKED 1,000 GROCERY SHOPPERS TO DETERMINE WHAT MATTERS TO THEM

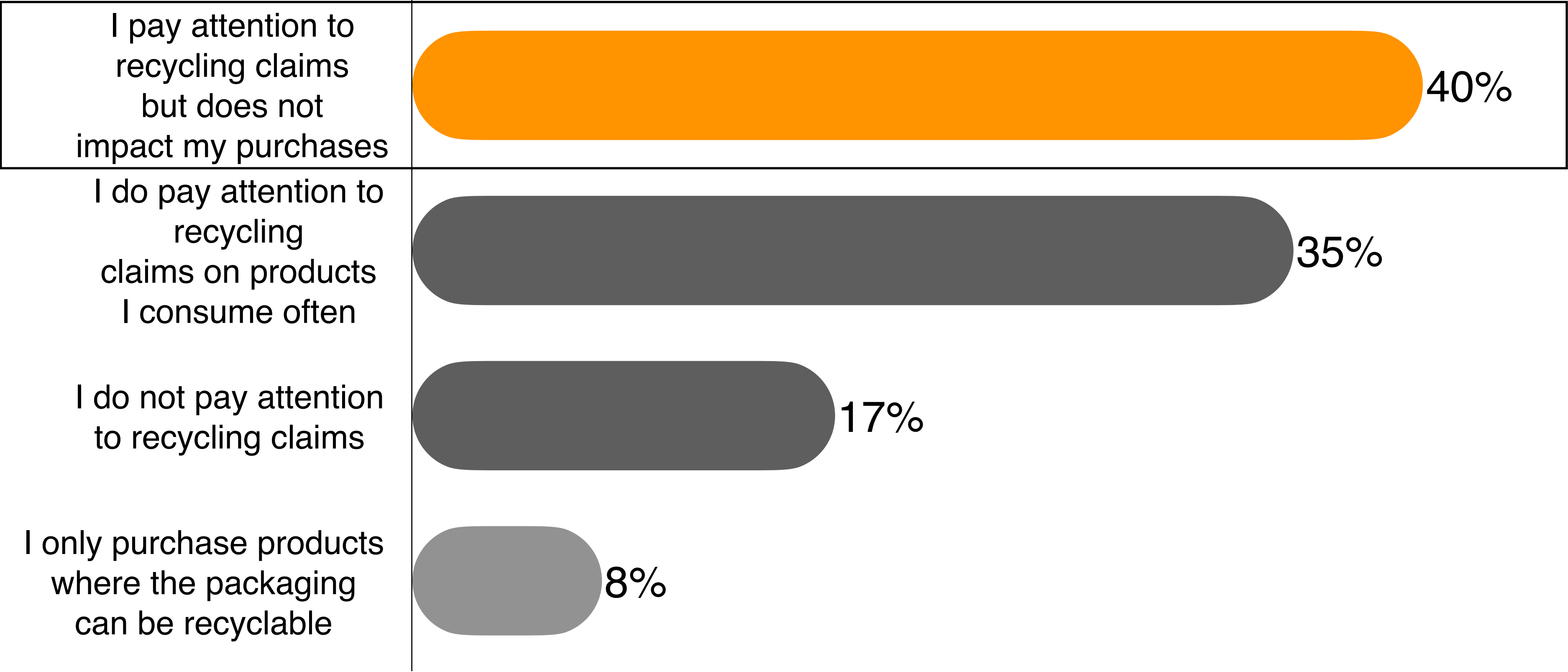


KEY QUESTIONS WE WANTED TO ANSWER

- What consumer segment is the most predisposed to purchasing sustainable?
- What materials are perceived to be sustainable and which are not?
- What other forms of sustainable practices can reduce reliance on plastic?
- What is the role of the retailer in reducing reliance on plastic?

SO WHAT IS THE **FUTURE** OF SUSTAINABLE PACKAGING?

RECYCLING CLAIMS DON'T HAVE MUCH OF AN IMPACT ON PURCHASING DECISIONS



WHICH OF THESE STATEMENT BEST DESCRIBES YOU WHEN

THE FUTURE OF SUSTAINABLE PACKAGING IS DRIVEN BY **ELIMINATING** EXCESS PACKAGING AND PLASTICS



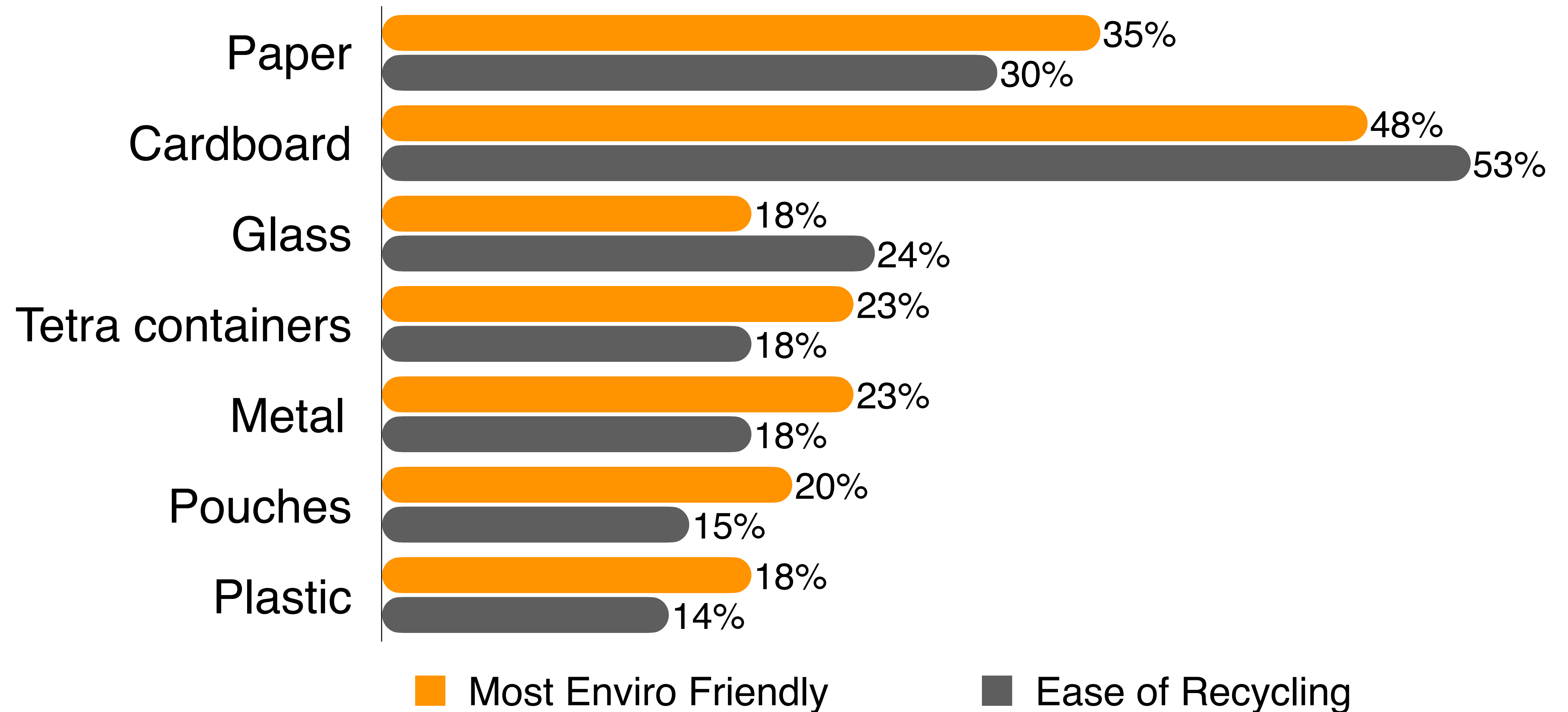
RESPONDENTS RANKED TOO MUCH
PACKAGING AS THE **MOST**
IMPORTANT FACTOR TO OVERCOME...



WHILE RANKING CONFUSION OF
RECYCLING MATERIALS AS THE
LOWEST

*SOURCE: SLD FUTURE OF SUSTAINABLE PACKAGING STUDY

WHAT MATERIALS DO CONSUMERS PERCEIVE AS RECYCLABLE?



**WHAT IS THE
DRIVER OF
SUSTAINABLE
PACKAGING?**

THE FUTURE OF SUSTAINABLE PACKAGING IS DRIVEN **IN- STORE**





**REUSABLE
GROCERY BAGS
ARE KEY FOR
SUSTAINABLE
CHANGE**



**72% OF
CANADIAN
CONSUMERS
PREFER THE
STORE***

**SOURCE: SLD E-COMMERCE FOR CPG STUDY*

SUSTAINABLE SERVICES ARE KEY TO GETTING SHOPPERS INTO THE STORE

58%

Of consumers said that the biggest barrier to refill services were no nearby locations

65%

Of consumers said they would try refill services with a convenient location

39%

Of consumers said they had an higher perception of brands with at least one circular service offering

THE OPPORTUNITY IS THE SUSTAINABLE ECOSYSTEM



**WHO ARE THE KEY
GROUPS BUYING
SUSTAINABLE
PACKAGING?**



THE GREEN-ASPIRER

- Environmentally sensitive
- Loyal to brands who are engaged in environmental discourse
- Highly motivated by *recyclable products* and *commitment to a social cause*
- Too much packaging is the challenge

ENVIRO-SAVERS

- This is the largest group that can impact the course of sustainable packaging
- Aware of the impact of packaging
- Wants to aid in environmental issues as long as it reduces grocery bills
- Highly motivated by *cost savings* while also being *good to the planet*



A VISUAL EXPLORATION

THE SUPERMARKET OF THE FUTURE



DESIGNED FOR COMMUNITIES.... PEOPLE TASTING SHOPPING

SUSTAINABLE ROOF
SOLAR PANELS
& WATER COLLECTION/
RECYCLING

RAPID SHIP
DRONE PORT

EASY ACCESS
BOPIS & DELIVERY

GLAZING TO ALLOW
FOR NATURAL
LIGHTING

DIGITAL SCREEN PLATE
SHOWS NEW MEAL
OFFERINGS TO INSPIRE
CUSTOMERS

BIKE SHELTER WITH
E-BIKE & SCOOTER
CHARGING

E-CHARGE
PARKING

**SUSTAINABLE FLEXIBLE
CONVENIENCE**

DISCOVER A JOURNEY OF DISCOVERY





DISCOVER • PERSONALIZATION
FEATURED MEAL KITS OFFER “NEW TASTES IN
FAMILY AND PERSONAL SIZES

COMMUNITY
SUPPORT LOCAL & SUPPORT THE
ENVIRONMENT & INCREASE
CONTROL OF SUPPLY CHAIN



DISCOVER & PERSONALIZATION
ZERO WASTE MADE EASY THROUGH
AUTO WEIGH AND PAY



DISCOVERY • COMMUNITY
EMBRACING THE FOOD TREND OF PLANT
BASED PRINTED PROTEIN



IN SUMMARY

IN SUMMARY

- Sustainable packaging change happens in small steps.
- Eliminating excess packaging is the biggest concern among consumers, shifting from plastic to glass and paper substrates.
- Bring sustainability claims on packaging to the front panel, with new, simplified iconography to indicate 100% recyclable.
- Drive promotions for reusable shopping bags and provide incentives for using reusable containers.
- Increase the availability of bulk items.
- Consumers are willing to participate in circular services in stores as long as they are convenient.
- Green-Aspirers and Enviro-Savers are the primary consumers that will accelerate the change to sustainable packaging.
- Sustainability doesn't end with packaging.



THANK YOU

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