

Sustainable Packaging in Manitoba

Strategic Roadmap for 2022-2025



Executive Summary

Sustainability has been a motivation for many consumers for decades. Recent trends in plant based meats and the rise of zero waste grocery and retail stores highlight the importance of sustainability for many consumers. With many turning their attention towards the harmful impacts of plastics on our oceans and land, we are at a turning point when it comes to the confluence of consumer demand and government regulation. Consumers, governments, and businesses are looking for alternatives that are better for the environment, better for people, and better for business. Now is the time for innovation and collaboration so we can meet the demands of new government policy and economic viability for businesses.

The Manitoba Industry - Academia Partnership (MI-AP), with partners, Supply Chain Canada, Food and Beverage Manitoba, Bioscience Association of Manitoba, Manitoba Environmental Industries Association and Canadian Manufacturers and Exporters, have developed this Sustainable Packaging strategic roadmap with the following priorities, to offer a path forward to ensure that Manitoba is a leader in this transition.

- Promote the need for and opportunities to develop a sustainable packaging ecosystem
- Ensure financial viability for sustainable packaging
- Improve infrastructure and capacity to enable rapid adoption of sustainable packaging

Bringing together academics from Manitoba's post-secondary institutions, industry leaders from various sectors, and representatives from the federal and provincial government, meaningful and instructive conversations took place about the current challenges and what is needed to enable a successful transition to sustainable packaging in Manitoba.

These efforts build upon previous work in this space, such as the "Sustainable Packaging in Food and Pharma" by the Bioscience Association of Manitoba and Prairie Research Kitchen, and "The Manitoba Protein Advantage Strategy" developed by the Province of Manitoba.

What is Sustainable Packaging?

Sustainable packaging is the development and use of packaging that results in reduced environmental impact and ecological footprint. It considers the whole life cycle of the product, from production to after-use.

Vision

A value-chain system that creates clear accountability for all groups invested in the sustainability circular economy.

- To accelerate the process of transition from a linear to circular economy
- To promote to the public and enable collaborators to support and develop sustainable packaging
- To enable corporations to transition to sustainable business practices that allow them to increase profitability, minimize risks, and protect the planet.

Mission

Obstacles vs. Opportunities:

Sustainable packaging is a critical issue for Indigenous communities and remote municipalities in our province due to challenges such as lack of infrastructure and adequate landfills, safe food packaging for transportation, and sometimes access to clean drinking water which requires the use of bottled water.

For manufacturers, the financial impact of committing to ecofriendly packaging is simply too costly, due to a host of reasons. Major hurdles include the cost of change, ensuring quality assurance, the lack of infrastructure to dispose of waste and/or to recycle the product after use. In addition, waste collection is mandatory for businesses while recycling is not; with the cost of waste collection approximately half the cost of recycling collection, this extra expenditure is a deterrent for businesses.

However, with the upcoming ban on single-use plastics, carbon tax, and extended producer responsibility, the business case will change and soon, the cost of disposal will exceed the cost of these new options. Between here and there, many steps are required to ensure that Manitoba companies remain competitive and future-ready.

Sustainability in Manitoba

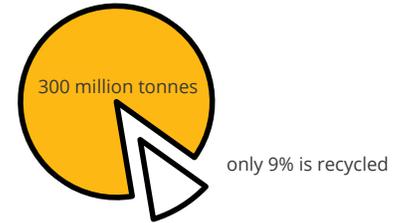
The Province of Manitoba has several pieces of legislation that covers sustainability. *Made-in-Manitoba Climate and Green Plan* specifies sustainable procurement of goods and services and improved waste reduction and management operations as a priority. The *Waste Reductions and Prevention Act* states it will ban retailers from supplying several types of single-use plastics by 2025 (polystyrene foam containers, disposable coffee cups).

Canada's targets:

The Federal Sustainable Development Plan (2022-2026):

- Reduce the amount of waste Canadians send to disposal by 30% by 2030;
- Plastic packaging in Canada contains at least 50% recycled content by 2030;
- By 2032, reduce single-use plastics that are entering the waste stream by 4% and entering the environment as pollution by 7%

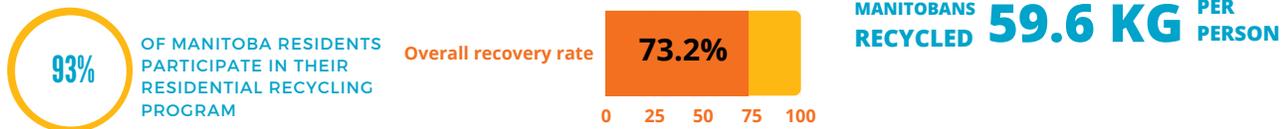
Plastic waste produced in Canada annually:



Other jurisdictions:

- European Packaging and Packaging Waste Directive aims to have 65% (by weight) of all packaging waste recycled by the end of 2025.
- Many large companies are making sustainable packaging commitments. For example, Walmart, PepsiCo and Danone all aim to reach 100% recyclable, reusable or industrially compostable packaging by 2025.

Manitoba consumer statistics:



**According to the The Multi-Material Stewardship Manitoba (MMSM) 2021 Annual report. MMSM is non-for-profit program funded by industry stewards who pay fees based on volume of packaging and printed paper they supply to residents.*

Strategic Planning:

On October 14, 2021, MI-AP, with co-hosts Supply Chain Canada, Food and Beverage Manitoba, Bioscience Association of Manitoba, Manitoba Environmental Industries Association and Canadian Manufacturers and Exporters, hosted a large roundtable meeting on Sustainable Packaging. The meeting specifically focused on the systems used when responding to policy change. Over 70 people attended that event, from across Manitoba's post-secondary institutions, industry stakeholders, sector council consultants, and government.

The enthusiasm from that meeting led the group to begin development a strategic plan for the sector in Manitoba. Through 3 virtually facilitated workshops, individuals representing Industry, Academia, Government and Industry Associations collaborated through inVision Edge's 5-step strategic planning process to visualize the future state, confront reality and design goals to move the province forward in this area.

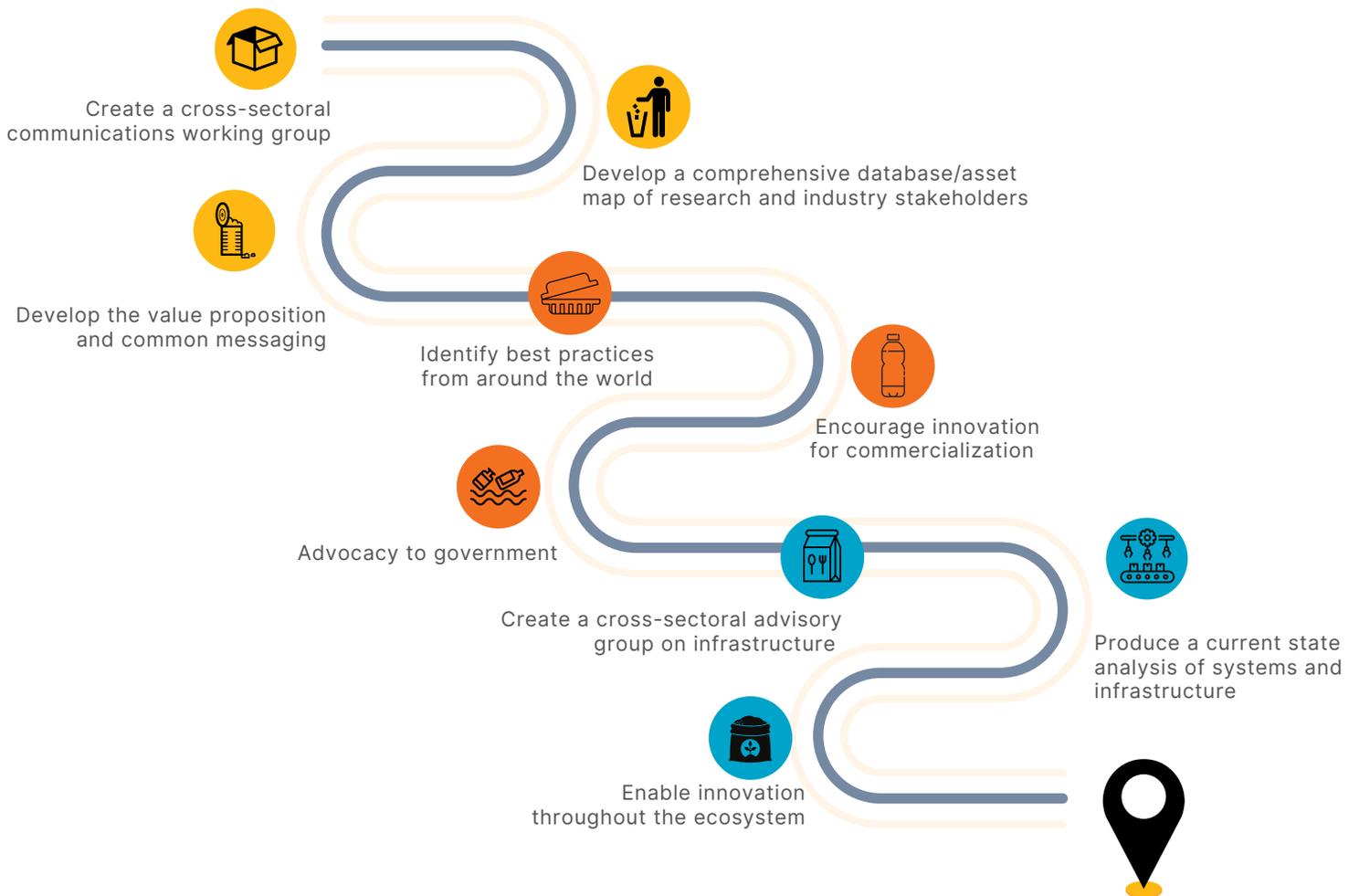




Strategic Priorities

- Promote the need for and opportunities to develop a sustainable packaging ecosystem
- Ensure financial viability for sustainable packaging
- Improve infrastructure and capacity to enable rapid adoption of sustainable packaging

Roadmap



Strategic Priorities and Goals

Strategic Priority #1: Promote the need for and opportunities to develop a sustainable packaging ecosystem

Goal 1: Create a cross-sectoral communications working group

Outcome: Identify the partners within industry, academia, government

Goal 2: Develop a comprehensive database / asset map to inform the research community and industry of opportunities for collaboration

Outcome: Identify the funders, scientists, industries and organizations etc. and their role, capacity and support mechanisms

Goal 3: Develop the value proposition and common messaging

Outcome: Secure the tools and resources needed for coordinated communication efforts

Outcome: Develop the marketing plan to promote industry and academia initiatives and success stories across the sector

Strategic Priority #2: Ensure financial viability for sustainable packaging

Goal 1: Identify best practices from around the world

Outcome: Investigate successes in product development and manufacturing processes and public policy decisions

Goal 2: Encourage innovation for commercialization

Outcome: Provide manufacturers with financially viable options that meet high-performance standards

Goal 3: Advocacy to government

Outcome: Incentives/disincentives to encourage rapid adoption for sustainable packaging

Outcome: Investment in research and infrastructure to accelerate capacity for sustainable practices

Strategic Priority #3: Improve infrastructure and capacity to enable rapid adoption of sustainable packaging

Goal 1: Create a cross-sectoral advisory group on infrastructure for sustainability in Manitoba

Outcome: Consultation with partners to establish advisory group membership

Goal 2: Produce a current state analysis of systems and infrastructure

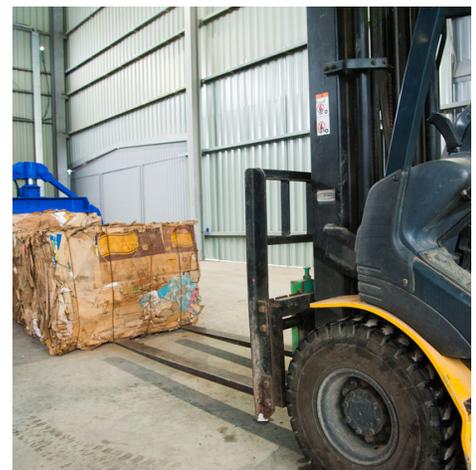
Outcome: Gain understanding of existing capacity throughout the ecosystem

Outcome: Assess impact of product or manufacturing changes across the ecosystem

Outcome: Identify gaps in the ecosystem

Goal 3: Enable innovation throughout the ecosystem

Outcome: Create clear pathways and processes for manufacturers and service providers by addressing the gaps in the ecosystem and connecting industry with research and available services



About Bioscience Association Manitoba

The Bioscience Association Manitoba is a non-profit association with members from across the bioscience industry, ranging from agricultural biotechnology to health biotechnology to cleantech biotechnology. It helps its members connect with key stakeholders and government officials by encouraging innovative partnerships.

Contact: info@biomb.ca
Website: www.biomb.ca

About Canadian Manufacturers & Exporters

Canadian Manufacturers & Exporters works to enable members to compete successfully in Canada and internationally, and to ensure manufacturing is recognized by the public and by policy-makers as an innovative and important part of Canada's economy.

Contact: info@cme-mec.ca
Website: <https://cme-mec.ca>

About Food & Beverage Manitoba

Food & Beverage Manitoba is an industry-led association dedicated to promoting Manitoba's vibrant food and beverage industry, and ensuring its members have the resources, strength and conditions they need to succeed.

Contact: info@foodbeveragemb.ca
Website: <https://foodbeveragemb.ca>

About Manitoba Environmental Industries Association

The Manitoba Environmental Industries Association works to advance environmental and clean technology opportunities in Manitoba through networking, education and support for its members. They also develop and deliver customized, high-quality workforce training to Manitoba's natural resources, energy and environment industries.

Contact: admin@meia.mb.ca
Website: <https://meia.mb.ca>

About Supply Chain Canada

Supply Chain Canada is the country's largest association for supply chain professionals. They represent the wider profession that includes the breadth of supply chain roles such as sourcing, procurement, logistics, inventory, transportation, distribution, operations, sustainability, replenishment, and contract management.

Contact: info@supplychaincanada.com
Website: www.supplychaincanada.com

About MI-AP

Manitoba Industry - Academia Partnership is an initiative to facilitate industry-academia collaboration for the economic, societal health, and vitality of Manitoba. Funded by Prairies Canada, MI-AP works with Manitoba's PSIs and the Business Council of Manitoba to develop a people-centred strategy so that Manitoba is well positioned to succeed in a rapidly changing environment.

Contact: info@miap.ca
Website: www.miap.ca

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