Invest NOVA SCOTIA

TRADE MARKET INTELLIGENCE REPORT

Sustainable Packaging in Canada

An overview of the challenges and opportunities for Nova Scotia businesses

Prepared by Invest Nova Scotia - September 2025

Disclaimer

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Table of Contents

Global Overview

Global Overview

Sustainable packaging involves creating packaging solutions that minimize environmental impact throughout their life cycle, from sourcing to disposal, while maintaining protection, functionality, and branding. Growing consumer demand for eco-friendly products, cost-effectiveness, and stricter government regulations are driving its adoption across industries. Sustainable packaging relies on recyclable, biodegradable, compostable, or reusable materials and aims to reduce pollution and hazardous chemical use. It is often considered in three forms: [i]

- **Recycled Packaging:** produced from materials reprocessed from previously used items, helping reduce waste and the demand for new raw materials. Often preferred due to its role in promoting a circular economy.
- **Reusable Packaging**: designed to be used multiple times, often within a system where it can be returned, cleaned, refilled, or repurposed. This method is particularly popular in food and beverage industries.
- **Bio-Based and Biodegradable Packaging:** is made from materials that can naturally break down into non-toxic components when exposed to environmental conditions like moisture and microorganisms. Common biodegradable materials include plant-based plastics, such as polylactic acid (PLA), paper, and cardboard.

Figure 1: *Global Market for Sustainable Packaging, by Process, Through 2029*[i]

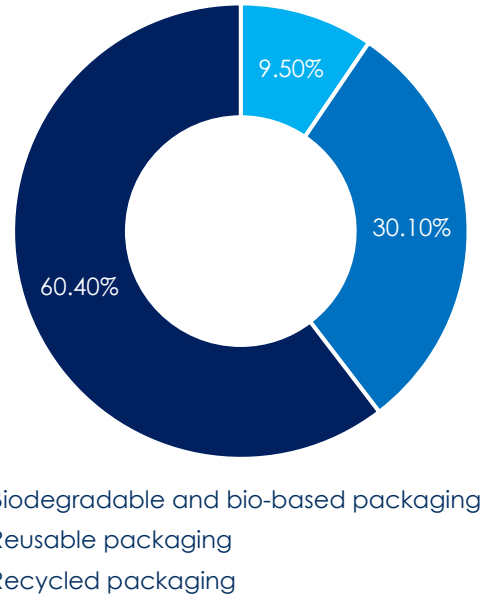
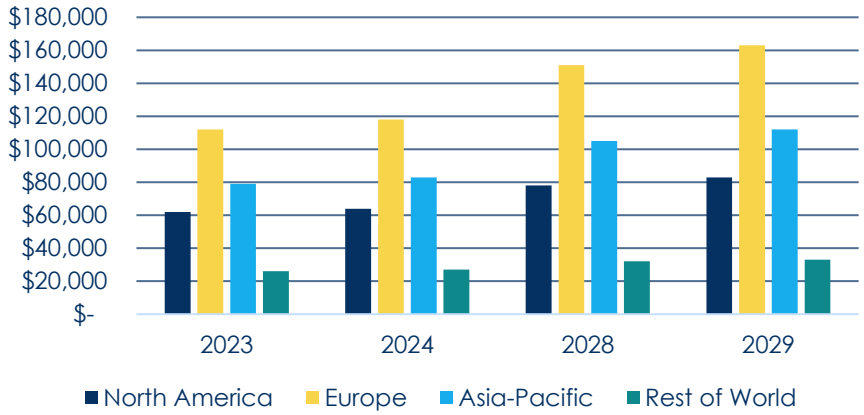
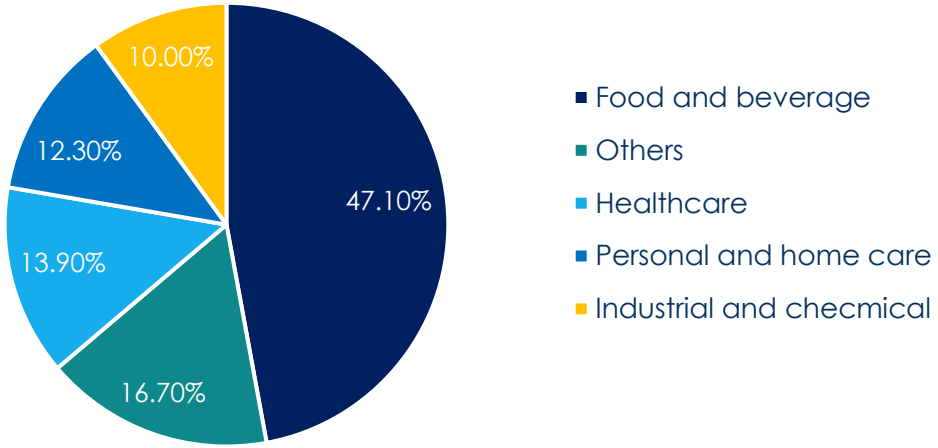


Figure 2: *Global Market for Sustainable Packaging, by Region, 2023-2029 ($ Millions)* [ii]



Valued at **$278.1 billion in 2023,** the global sustainable packaging industry is set to reach $391.1 billion by the end of 2029, growing at a compound annual growth rate (CAGR) of 6%. **Europe** leads the market share with 40.4%, followed by **Asia-Pacific** (28.4%), which is the fastest-growing region (6.8% CAGR). Growth in the sector is driven by demand in **food**, **healthcare**, and **consumer goods**, alongside rising sustainability efforts. [iii] In Canada, the sustainable packaging market was valued at $7.9 billion in 2023, representing a CAGR of 2.2% between 2018 and 2023. [iv]

Figure 3*: Global Market Share of Sustainable Packaging, by End User, 2023*[v]



The sustainable packaging market is on a **strong upward trajectory**, driven by regulatory pressure, environmental awareness, and evolving consumer preferences. However, the disparity between the increasing demand for sustainable solutions and the low recycling rates—especially for plastics—underscores the need for improved infrastructure and innovation. Companies that invest early in scalable, cost-effective recycling technologies and circular packaging systems will be best positioned to capitalize on long-term market growth.

Global Market Drivers

Consumer Expectations

Rising consumer concern over climate change and plastic waste is reshaping the packaging industry. Nearly one in two consumers are actively reducing plastic use, recycling more, and opting for sustainable packaging alternatives, driving significant industry change.[vi] A 2025 McKinsey & Company survey about sustainable packaging included more than 11,000 respondents across 11 countries and four continents. Key findings from the survey include: [vii]

- **Products making sustainability-related claims experienced 28% cumulative growth** over the five years leading up to the study—compared to only 20% growth for products without such claims.
- **Willingness to pay for sustainable packaging varies widely across countries** in 2025—from as low as 40% in Japan to as high as 85% in India for respondents saying they'd pay a lot more.
- **Younger and higher-income consumers exhibit the highest willingness to pay more**: for example, only 1% of high-income German Gen Xers would pay a lot extra, versus 25% of high-income millennials.
- **Nearly 70% of U.S. consumers believe brand owners or packaging producers should be held responsible** for sustainability, while only 10% see themselves as primarily responsible.

Canadian Consumer Perspectives on Sustainability

Canadians are increasingly aware of packaging's environmental impact, driving demand for sustainable materials and brands committed to eco-friendly practices. This shift aligns with **Canada's circular economy goals**, which prioritize waste reduction, resource efficiency, recycling, and reusage. Sustainable packaging supports these efforts by minimizing waste, promoting recyclability and compostability, and reducing reliance on non-renewable resources. [viii] [ix] [x]

- **55%** of Canadians say they **actively seek out** grocery store items that use less packaging or have a minimal environmental impact (47%).
- **94%** of Canadians surveyed said they are **personally motivated to reduce single-use plastic** (SUP) food packaging because of its environmental impacts.
- **56%** of Canadians are **already actively shopping** for food with non-plastic packaging.
- **42%** of Canadians now **avoid plastic** and buy products with less packaging whenever possible.
- **38%** of Canadians are looking for products with **environmentally friendly packaging**.
- **62%** of Canadians are ready to **pay more** for packaging that originates from a more environmentally friendly environment.
- **74%** of Canadians consider sustainability an **important factor** when making purchases

High Demand for Recycled Material-Based Packaging

Paper continues to be a leading renewable and eco-friendly packaging material, valued for its high recyclability and minimal environmental impact. However, the effectiveness of paper recycling depends on several factors, including its **composition**, **design**, and the **efficiency of collection** and **reprocessing** systems.[xi]

Innovations in fibre quality, coatings, and recycling infrastructure play a crucial role in maximizing paper's potential as a sustainable alternative to plastic. Companies are also incorporating recycled materials (paper, plastic, metal, and glass) into packaging to advance sustainability goals and meet client expectations.

The following table provides an **overview of different recycled materials**, common packaging examples and how businesses can incorporate these recycled materials into their operations.

Recycled Material-Based Packaging[xi]

Material	What are common packaging examples	Why is it popular	How can businesses incorporate
Paper & Cardboard	Boxes, cartons, paper bags	Highly recyclable, biodegradable, and widely accepted by recycling programs. Recycled paper products are often used to **create new** packaging materials.	• Switch to 1**00% recycled paperboard** for packaging • Optimize **packaging design** to reduce material usage
Aluminium	Beverage cans, foil, aerosol cans	One of the most valuable and efficiently recycled materials. Recycling aluminum saves up to 95% of the energy needed to produce it from raw materials.	• Use recycled aluminum content in cans and **flexible packaging** • Partner with recycling facilities for **closed-loop programs**
Glass	Bottles, jars, containers	**100% recyclable** without loss of quality or purity. However, glass recycling **depends heavily on local facilities** and colour sorting (clear glass is most in demand).	• **Standardize glass** colour to improve recyclability • Implement bottle return and reuse schemes
Plastics (PET & HDPE)	**PET (#1 plastic):** Water and soft drink bottles, some food packaging **HDPE (#2 plastic):** Milk jugs, detergent bottles, heavy-duty containers	**PET** and **HDPE** plastics have the highest recycling rates among plastics. However, plastics overall are less efficiently recycled compared to paper, metal, and glass.	• Incorporate high percentages of PET or HDPE in packaging • **Clearly label packaging** to aid consumer recycling
Steel (Tinplate)	Food cans, paint cans	Like aluminum, steel can be **recycled indefinitely** without losing strength. It's commonly used for rigid packaging applications.	• Use recycled steel for cans and containers • Design cans for easy recyclability (minimal coatings, easy-to-remove labels)

Global Regulatory Pressures

As environmental concerns escalate and public pressure for sustainability intensifies, governments worldwide are introducing stricter regulations to **drive the adoption of recycled materials and reduce packaging waste**. These new and upcoming laws mandate minimum levels of recycled content, enforce packaging recyclability standards, and place greater responsibility on producers through **Extended Producer Responsibility (EPR) schemes**. Staying ahead of these regulatory shifts is critical for businesses aiming to remain compliant, avoid penalties, and meet growing consumer expectations for sustainable practices. [xii] [xiii]

In parallel with these regulatory efforts, global collaboration is also accelerating change. The Plastics Pact Network, convened by the Ellen MacArthur Foundation in partnership with WRAP, unites national and regional initiatives under a shared vision of a **circular economy for plastics**. By bringing together businesses, governments, NGOs, and local stakeholders, the network works to eliminate unnecessary plastics, promote reusable and recyclable packaging, boost recycled content, and scale effective recycling systems, driving measurable progress toward ending plastic pollution.

Together, these regulatory measures and collaborative initiatives form a powerful force reshaping the packaging landscape. The following summary outlines **key existing and emerging regulations across major global markets**, illustrating how policy and partnership are converging to reduce environmental impact and expand the use of recycled materials in packaging.

Businesses are encouraged to **stay informed** and **adapt** to these evolving legal requirements.

Global Regulation Considerations

Region or Country	Law/Regulation	Summmary
European Union	Packaging and Packaging Waste Regulation (PPWR)	Proposed updates require minimum recycled content in plastic packaging by 2030 (e.g., 30% for beverage bottles). Mandatory recyclability targets are also set.
France	Anti-Waste Law for a Circular Economy	Requires 100% of plastic packaging to be recyclable by 2025. Introduces penalties for excessive packaging and mandates minimum recycled content in plastic bottles (25% by 2025, 30% by 2030).
United Kingdom	Plastic Packaging Tax	Plastic packaging must contain at least 30% recycled content. Otherwise, a tax of £200 per metric ton is applied.
United States	Extended Producer Responsibility Packaging Laws	A growing number of states including California, Colorado, Maine, Maryland, Minnesota, Oregon and Washington, have enacted EPR laws, which set recycling and recycled-content targets, and aim to shift financial responsibility from municipalities to producers.
Australia	2025 National Packaging Targets	Voluntary but industry-supported targets: 70% of plastic packaging must be recycled or composted by 2025; 50% average recycled content across all packaging. Moving towards mandatory measures.
Japan	Plastic Resource Circulation Act	Promotes design standards for easier recycling and mandates corporate responsibility for reducing, reusing, and recycling packaging materials.
South Korea	Resource Circulation Performance Management System	Enforces recycling rates on companies and restricts use of non-recyclable or composite packaging materials. Introduces eco-modulation fees (higher fees for harder-to-recycle packaging).

Canadian Regulation Considerations

Canada's sustainable packaging regulations, including federal initiatives and provincial EPR programs, are essential for both domestic compliance and export competitiveness. Meeting Canadian standards on recyclability, recycled content, and plastic reduction strengthens environmental credentials abroad while ensuring legal compliance at home.

Level	Law/Regulation	Summmary
Federal (Canada)	Canada-wide Strategy & Action Plan on Zero Plastic Waste	Establishes a circular economy framework and lifecycle management principles for plastics, guiding provincial EPR and industry planning.
	Single-Use Plastics Prohibition Regulations (SUPPR)	Drives demand for sustainable packaging by removing common single-use items from the market.
	Recycled Content & Labelling Rules	50% recycled content target by 2030, encourages supply chain shifts toward recycle use and accurate labeling, promoting trust and design accountability.
	Circular Plastics Economy Initiatives (2022-2027)	A multi-department effort supporting innovation, waste prevention, and market transformation. Offers potential funding, research, or partnerships that packaging businesses can leverage to support sustainability efforts.
Provincial (Various)	Extended Producer Responsibility	70% of Canadian provinces and territories have established EPR regulations. Producers must register, report, and fund recycling operations—shifting waste management costs and responsibilities onto industry. • List of Provincial and Territorial EPR Regulations • Overview of producer hierarchies and obligations across Canada
Provincial (Nova Scotia)	*Environmental Goals and Climate Change Reduction Act*	Effective December 1, 2025, Nova Scotia's Extended Producer Responsibility (EPR) program for packaging, paper products (PPP), and packaging-like materials shifts the responsibility for curbside recycling from municipalities to producers, aiming to standardize recycling, reduce landfill waste, and promote eco-friendly packaging. The ERP for PPP is administered by Divert NS.

A Guide to Sustainable Packaging

A Guide to Sustainable Packaging

Elimination

Packaging is eliminated while user experience is maintained or enhanced. The process of elimination often unlocks hidden innovation. By rethinking packaging, products, and business models, companies can remove unnecessary packaging while preserving or enhancing the user experience. Demand for plastic packaging is set to double in the coming decades; thus, managing its flow will be unsustainable. To achieve a circular economy, we must reduce the material that needs to be circulated. [xiv]

Direct Elimination

This process is focused on directly eliminating packaging that **does not** serve an essential function. As the additional packaging is deemed unnecessary, it can be directly removed without any significant adjustments, innovation, or loss of product value. The following are examples of direct elimination.

- **Multi-Buy Packaging:** Tesco removed plastic film wrapping from multi-buy tins (soups, beans, tuna, and tomatoes) and their own branded multi-pack drinks in all UK stores. These initiatives have eliminated over 100 million pieces of film per year, equivalent to over 500 tons.
- **Tear-Offs:** Plastic tear-offs covering the bottle cap sleeves removed from Nestle water bottles. Now, it reads: 'if it clicks, it's safe,' to identify unopened bottles.
- **Plastic Films:** Clear plastic film has been removed from individually sold peppers and organic bananas in stores across Canada.[xv]
- **Paper Inserts and Leaflets:** Pharma companies are replacing printed package inserts with digital QR codes linking to online product information.[xvi]

Innovative Elimination

This process is focused on packaging that **does** serve an essential function, however it is indirectly eliminated through innovation, where the function is achieved in a different way.

- **Edible Packaging:** Apeel created an edible coating made from plant material that extends the shelf-life of fresh fruit and vegetables. Designated FDA GRAS (Generally Recognized as Safe). Eliminates plastic wrap without increasing food waste. One supplier expects to cut over 30 tonnes of shrink wrap annually. Assessments show carbon savings of 18% to 80%, depending on the product. Compatible with compostable food waste systems.

- **Dissolvable Packaging:** MonoSol is water-soluble film technology. Films that dissolve in water. The films have many applications ranging from home and personal care to food applications. Capable of replacing single-use items such as sachets, bottles, bags, and protective films. Existing formulations contain up to 25% bio-based materials.

- **Sustainable Materials:** Maple Leaf Foods reduced plastic packaging weight by using 100% recyclable trays made with 95% post-consumer recycled content. 30% reduction of material weight across Deli Meat Portfolio. 40% reduction in material weight across branded lunch kits. 14% average reduction in material weight across Maple Leaf Prime.

- **Smart Labels:** Bayer Global has added QR codes to labels so consumers can scan to access comprehensive information regarding their medicine. They have also recently introduced new Accessible QR codes for the visually impaired.[xvii] By 2030, Bayer aims to be climate neutral with 100% of packaging recycle-ready or reusable.

Reuse

Reuse refers to packaging designed for multiple uses within a dedicated system, serving its original purpose repeatedly. Unlike single-use alternatives, reusable packaging is collected, cleaned, and reintegrated into the economy without being discarded. This process ensures durability, reduces waste, and minimizes resource consumption while maintaining functionality and hygiene standards. Effective reuse systems often involve return incentives, smart tracking, and shared logistics to optimize efficiency and sustainability. [xviii]

- **Refill at Home:** Users refill reusable containers at home, often via subscription deliveries. Examples such as concentrated or tablet formats, customizable packaging, and auto-refill subscriptions reduce packaging and transport costs while enhancing user convenience and brand loyalty.
- **Refill on the go:** Users refill reusable containers on the go, such as at in-store dispensers. Examples include custom dispensing (users choose quantities and content), smart and auto-dispensers and flexible sales points (stores, public spaces, offices or mobile units).
- **Refill from Home:** A collection service retrieves packaging from the user's home. These can be in the form of auto-replenishments (subscriptions) or shared logistics (joint collection and cleaning services).
- **Return on the go:** Users return packaging at stores or drop-off points, like deposit machines or mailboxes. Smart tracking, third-party services, and shared delivery systems make reuse easier by helping to track packaging, handle cleaning, and cut costs.

Material Circulation

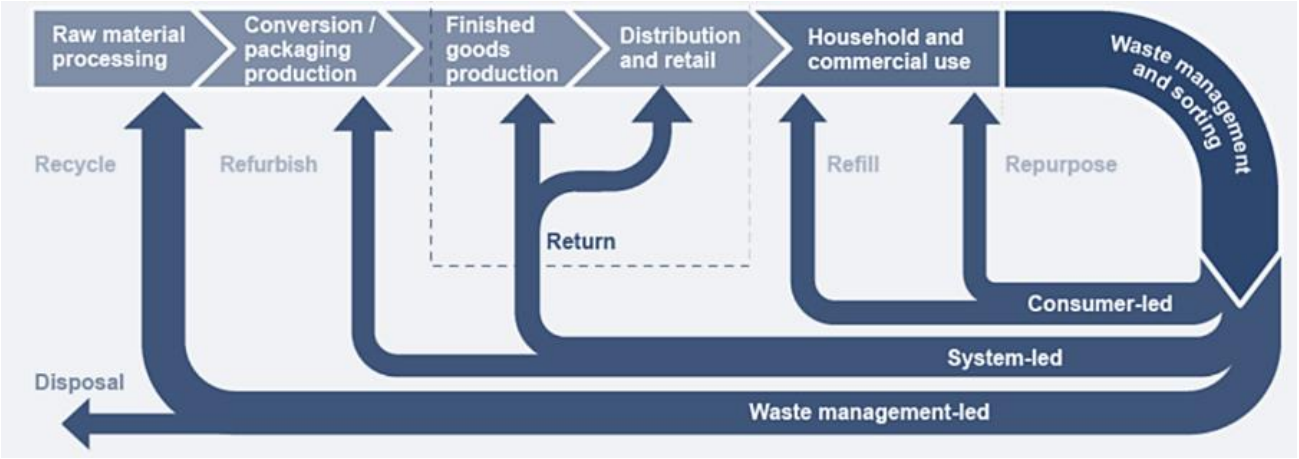
Material circulation refers to the **continuous reuse of packaging materials** within the economy through recycling or composting. This process ensures that materials retain their value and are not lost as waste. When applicable, it also includes the recovery of nutrients from leftover food contained within the packaging. By keeping materials in circulation, businesses can reduce reliance on virgin resources, lower environmental impact, and contribute to a more sustainable, circular economy. Effective material circulation relies on efficient collection, processing, and reintegration systems that maximize resource recovery while maintaining material quality.

- **Plastics Recycling:** Plastic packaging is mechanically or chemically processed into materials for making new products.
    - Implement product and delivery modifications to support recyclability, simplify packaging design, incorporate recycled materials, and shift recycling efforts upstream to enhance collection efficiency, material quality, and value.
- **Plastics Composting:** Plastic packaging breaks down in industrial composting, generating biomass, water, and CO_2.
    - Redesigning packaging to be fully compostable and aid organic waste collection or packaging is integrated into dedicated systems with proper collection and processing.
- **Substitution:** Plastic packaging is replaced with recyclable or compostable alternatives like paper or aluminum.
    - Replace plastic films or protective packaging with alternatives.

Supply Chain Analysis

In 2024, Price Waterhouse Cooper (PwC) conducted a study on returnable packaging, with a focus on the processes within the supply chain. The following graphic illustrates the **circular economy pathways** within the **packaging value chain**, showcasing various stages from raw material processing to household and commercial use, and eventually to waste management and sorting. It maps out potential interventions—such as recycling, refurbishing, refilling, and repurposing—that divert materials from disposal and reintroduce them into earlier stages of the supply chain. [xix]

Figure 4: *Value Chain Illustration* [xvii]



The graphic effectively highlights the **interplay between consumer-led and system-led initiatives** in creating circularity. Notably, it reveals how proactive returns, refills, and repurposing efforts can significantly reduce dependency on waste management systems. By emphasizing upstream interventions like refurbishing and recycling, businesses can move closer to achieving zero-waste goals while reducing reliance on virgin materials. This underscores the importance of **integrated collaboration** between consumers, businesses, and waste systems to drive sustainable packaging solutions.

Golden Design Rules for Plastics Packaging

The Consumer Goods Forum (CGF), through its Plastic Waste Coalition of Action, has established nine voluntary and time-bound Golden Design Rules for plastic packaging to **simplify recycling, eliminate problematic materials, reduce unnecessary packaging, and promote clear recycling instructions**. Backed by global consumer goods companies representing over 10%of the plastic packaging market, the rules aim for industry-wide adoption by 2025 in support of the Ellen MacArthur Foundation's New Plastics Economy Global Commitment.[xx] In Canada, these global rules have been adapted through the Canada Plastics Pact (CPP), which provides tailored guidance to help Canadian businesses integrate the Golden Design Rules within the national context. By aligning domestic action with international standards, the CPP is enabling Canadian companies to **scale solutions, reduce plastic waste**, and **accelerate the transition** to a **circular plastics economy**. [xxi]

The full set of **nine global golden design rules** include: [xxii]

① **Increase recycling value in PET Bottles**	② **Remove problematic elements**	③ **Eliminate excess headspace**
Eliminate pigments and use recycling-friendly labels	Eliminate the use of carbon black, PVC and PVDC, EPS and PS, PETG in rigids, and ox-degradables	Ensure a maximum of 30% headspace in flexible packaging
④ **Reduce plastic overwraps**	⑤ **Increase recycling value in PET Trays**	⑥ **Increase recycling value in flexible packaging**
Eliminate unnecessary overwraps	Use clear, mono-material PET and recycling-friendly labels and sleeves	Use mono-material plastic for flexible packaging
⑦ **Increase recycling value in rigid HDPE and PP**	⑧ **Reduce virgin plastic in B2B packaging**	⑨ **Use on-pack recycling instructions**
Use recycling-friendly labels, sleeves and closures	Eliminate unnecessary plastic, use recycled content or switch to reuse models	Guide consumers with recycling or reuse instructions on packaging.

Market Considerations

Circular Materials & System Readiness

To enable true sustainability, packaging must be designed with its full lifecycle in mind –from responsible sourcing to end-of-life recovery. However, without the right infrastructure and systems, even the most eco-friendly materials can fall short. Addressing circularity starts with materials and extends to the ecosystems that support their reuse, recycling, or composting.[xxiii]

Challenges:

- Lack of recycling/composting infrastructure.
- Low adoption of take-back and reuse systems.
- Confusion around recyclability and compostability.

Key Considerations:

- Source certified, recycled, or renewable materials (e.g., rPET, FSC paper).
- Improve material traceability and local sourcing to cut transport emissions.
- Design for recyclability or compostability and support take-back programs to close the loop.

Efficient, Scalable Packaging Design

Balancing environmental impact with performance, cost, and scalability is a key challenge in sustainable packaging. Businesses must optimize design, manufacturing processes, and material efficiency while overcoming cost barriers and technological limitations to achieve long-term viability.[xxv]

Challenges:

- Higher costs for sustainable options, especially for SMEs.
- Technological limitations in durability and cost-efficiency.
- Inconsistent labeling adds confusion and undermines impact.

Key Considerations:

- Design for transport efficiency and reverse logistics integration.
- Ensure durability during transit without compromising sustainability.
- Sourcing materials locally to reduce transportation emissions.
- Align with evolving regulations and educate consumers with clear labeling and sustainable branding.

Logistics, Compliance & Consumer Engagement

Sustainability doesn't end at the factory—it must carry through distribution, regulation, and consumer use. Successful implementation requires packaging that supports efficient logistics, meets evolving regulations, and connects clearly with consumers through education and transparent labeling.[xxv]

Challenges:

- Complex supply chains limit return logistics.
- Low consumer awareness and adoption of reusable systems.
- Regulatory pressure varies regionally, causing inconsistency.

Key Considerations:

- Use lightweight, mono-material, and modular designs for ease of reuse and recycling.
- Prioritize energy-efficient and waste-efficient production processes.
- Account for lifecycle costs and ensure volume flexibility for scale.
- Pursue certifications to build credibility and ensure compliance.

Why Sustainable Packaging is a Strategic Business Decision

For businesses across sectors, sustainable packaging is no longer a niche consideration—it's rapidly becoming a core expectation from consumers, regulators, and supply chain partners. As environmental responsibility shifts from a value-add to a business imperative, Nova Scotian companies face both challenges and significant opportunities in adopting more sustainable packaging practices.

Investing in Circular Packaging Supports Long-Term Viability

Recyclable, compostable, and renewable materials are increasingly available—but in Canada, many regions lack the infrastructure to process them effectively. This can limit the immediate impact of sustainability efforts. However, businesses that invest now in designing for circularity and participating in take-back or extended producer programs position themselves ahead of tightening regulations and shifting public policy.

Design Efficiency Balances Sustainability with Performance

Modern sustainable packaging solutions can reduce material use, improve recyclability, and support brand values—but they must also meet functional requirements and cost targets. While some options come with higher upfront costs, they can deliver long-term savings through material efficiency, reduced waste, and enhanced brand reputation. Businesses that evaluate packaging holistically—from sourcing to disposal—will be better equipped to identify cost-effective, scalable solutions.

Supply Chain Alignment Is Critical to Success

Implementing sustainable packaging touches every part of the supply chain. From securing ethical material sources to managing reverse logistics for reusable systems, integration is key. Without alignment across production, logistics, and retail, packaging upgrades may create inefficiencies or unexpected costs. Companies that engage suppliers and partners early will find smoother, more cost-effective transitions.

Transparency Builds Consumer Trust and Loyalty

Consumer demand for sustainable products is rising, but trust hinges on clarity. Confusing or inconsistent labeling can result in poor disposal practices and skepticism. Businesses that clearly communicate their packaging choices—and back them with certification or guidance—can build stronger customer loyalty and brand credibility in an increasingly eco-conscious market.

Regulatory Momentum Is Accelerating

New and proposed regulations across Canada and globally are mandating reductions in single-use plastics, requiring recycled content, and enforcing clearer labeling. Adopting sustainable packaging now can help businesses avoid disruption, reduce compliance risk, and stay competitive as regulations evolve.

Additional Resources to Learn More

Want to learn more on how you can incorporate sustainable packaging in your business? Here are some resources to help get you started:

Take BDC's free Environmental Maturity Assessment for Manufacturers to understand how green your manufacturing process is.

Leverage the Canadian Product Market Association (CPMA) Sustainable Packaging Guide for Food and Fresh Produce and Packaging Assessment Tool to support sustainable packaging practices.

Consult BDC resources for guidance on how to build a sustainable supply chain.

Use the Government of Canada's #BeatPlasticPollution Challenge for tips on alternatives to single-use plastic items.

Explore BDC's curated list of climate-related federal and provincial funding programs to support sustainable initiatives.

Upstream Innovation: A Guide to Packaging Solutions – A handbook on designing out plastic waste through product, material, and business model innovation.

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Invest Nova Scotia has a number of programs and servces that can support you.

Find out more at investnovascotia.ca

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