



FARM FOUNDATION® FORUM

UNWRAPPING PACKAGING REGULATIONS IMPACTING AGRICULTURAL TRADE AND SUSTAINABILITY

APRIL 30, 2024



FARM CREDIT

Today's webinar is made possible by a grant from Farm Credit

#FarmFoundationForum







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MARTHA KING

Vice President, Programs and Projects
Farm Foundation

MEET FARM FOUNDATION

A 501(C)(3) NON-PROFIT AT THE INTERSECTION OF AGRICULTURE AND SOCIETY

**Farm Foundation
is an ACCELERATOR
of practical solutions
for agriculture.**

**We accelerate PEOPLE
and IDEAS into ACTION**



OUR MISSION AND VISION GUIDE OUR WORK

Mission:

**To build trust and understanding
at the intersections of agriculture
and society.**

Vision:

**To build a future for farmers,
our communities and our world.**



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IMPORTANT NOTES

- Submit questions by clicking on the **Q&A Button** at the bottom of your screen.
- Please **include your name and company** so questions may be contextually understood.
- Due to **time limits**, we may not be able to ask all questions submitted.
- This Forum is being recorded and will be posted on our website at **farmfoundation.org** as well as the Farm Foundation **YouTube** channel.
- Please take the **short survey** at the conclusion of the Forum.

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**Farm
Foundation®**
Accelerating people & ideas



MODERATOR CORY CONNORS

Director of Sustainable Packaging,
Orora Packaging Solutions

About Orora Packaging Solutions



A global packaging and visual communications company leading the transition to a more sustainably packaged future. We come together as One Orora across our distribution, manufacturing and visual and graphic businesses to deliver exceptional solutions and outstanding service to our customers.

Our Services



8
Countries

33
Manufacturing
Plants

92
Solution Sites

8.5k
Team
Members

About Cory Connors (“Corygated”)

Director of Sustainable Packaging for OPS
& Host of the “Sustainable Packaging Podcast”



**Sustainable
Packaging
Podcast**

250+ Episodes

74,000
Downloads



**Sustainable
Packaging
LinkedIn
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12,954
Subscribers



Cory Connors · 1st
Sustainable Packaging is possible | Top
Voice LinkedIn | 90K+ on TikTok @Corygater
Host of Sustainable Packaging Podcast | IP
Member | I'll Help You make your Packag
Sustainable

**Certified Top
Sustainable
Design Voice
of LinkedIn**

25,500
Followers



**10+ Years as a
Packaging Consultant**

@Corygated TikTok
90,000+ Subscribers





TAMARA MURUETAGOIENA

Vice President of Sustainability,
International Fresh Produce Association

Unwrapping Packaging Regulations Impacting Agricultural Trade and Sustainability

Tamara Muruetagoiena
Vice President of Sustainability at IFPA
Farm Foundation, April 30th, 2024








Let's talk about
real **sustainable**
packaging

International Fresh Produce Association

Our members

- ✓ **Growers**
- ✓ **Shippers**
- ✓ **Packaging**
- ✓ **Retailers**
- ✓ **Foodservice**
- ✓ **Solution providers**

IFPA Sustainability

-  Packaging
-  Food Waste / Food Loss
-  Regenerative Agriculture
-  Social Responsibility / Labor
-  Renewable Energy
-  Water
-  Climate / Carbon / GHG emissions



Fresh Produce and Sustainability



CONSUMPTION OF FRUITS AND VEGETABLES HAS IMPORTANT BENEFITS TO HUMAN HEALTH



THE ENVIRONMENTAL FOOTPRINT OF OUR DIETS CAN BE SIGNIFICANTLY REDUCED BY CONSUMING FRUITS AND VEGETABLES

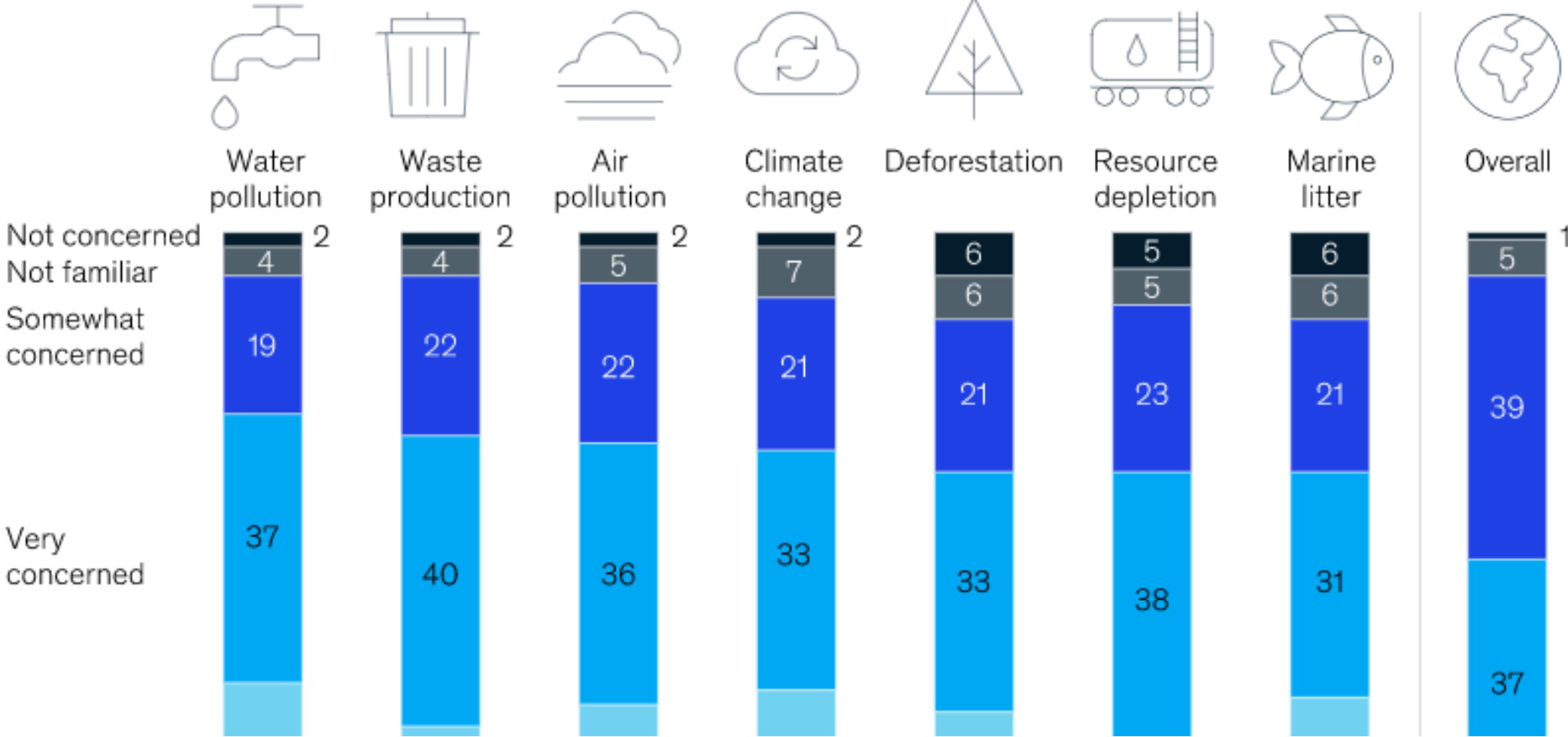


OUR GOAL IS TO ESTABLISH BEST PRACTICES AND GUIDANCE TO THE FRESH PRODUCE INDUSTRY SPECIFIC TO SUSTAINABLE PACKAGING



Consumers' concerns about the environmental impact of packaging are spread almost equally among a number of factors.

Concern over environmental impact of product packaging,¹ % of respondents



Consumer sentiment: Sustainability

Global Packaging Regulations

- **Global Packaging regulations**
 - Single-use plastic reduction
 - EU + Canada + Australia + New Zealand +...
- **The Alliance for Sustainable Packaging for Foods**

engage with regulators, governments, researchers and civil society organizations to ensure that packaging regulations for food achieve environmental sustainability without compromising food safety and product quality, and without increasing carbon footprint of the industry.





Sustainable Packaging

Our goal: less packaging and better packaging

Reduce packaging while maintaining food safety, quality & reducing waste

Plastic

Improving the environmental performance of plastic

Recycling

Supporting innovation to increase recyclability and recycled content

Compostables

Packaging & PLU stickers

System Design & Reusable Packaging

Finding efficiencies to reduce p







JEFFREY BRANDENBURG

President,
The JSB Group

Farm Foundation Forum



PACKAGING
ANALYSIS

Unwrapping Packaging Regulations
Impacting Agricultural Trade and
Sustainability featuring
April 30th, 2024

Presented by:
Jeffrey Brandenburg



Packaging

Independent of packaging type; whether conventional polymer, bio-polymer, compostable, fiber or PCR. We must understand:

What do we want out of our packaging?

In other words the need to understand **functionality!**

What is the role of packaging?

Keep what's in in, and keep what's out,

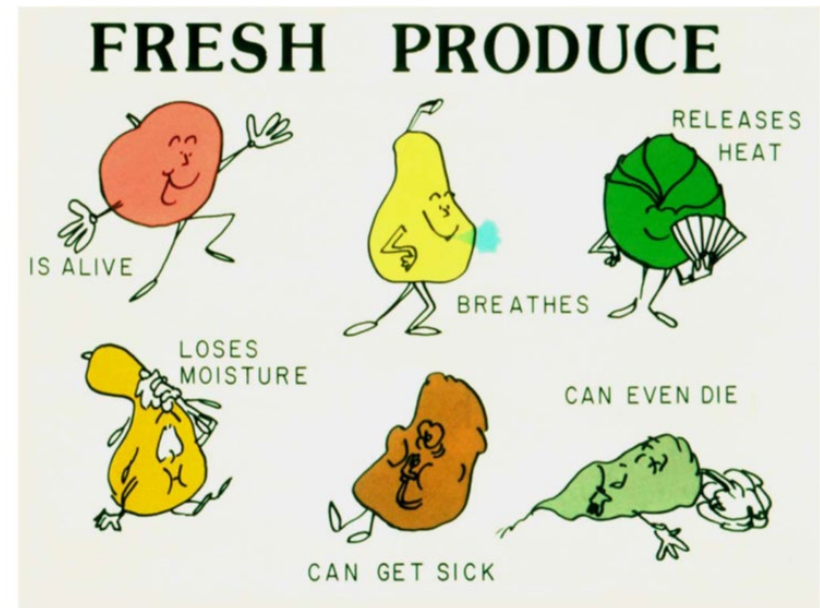
Provide physical protection,

Communication and visibility,

How do you efficiently fill and use the packaging,
within the distribution channel

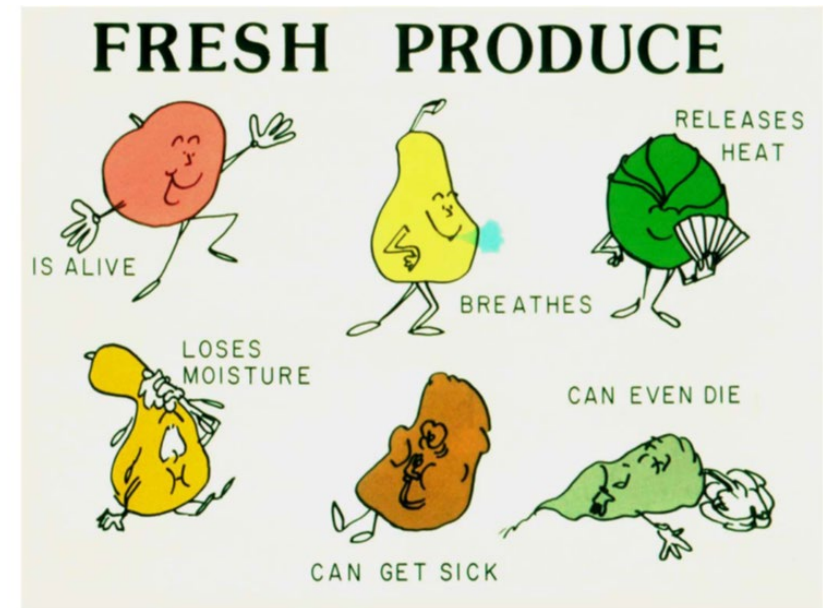
The greater the packaging functionality the greater the,
challenge to provide an alternative option.

What makes fresh produce packaging unique and more complex?



Functionality

- **Provide physical protection**
 - Crush Strength
 - Cases and pallets
 - Retail pusher racks
 - Puncture
 - Tear
- **Marketing and information**
 - Visibility
 - Printing
- **Keep what's in in and keep what out out**
 - MAP
 - Moisture management & absorption
- **Distribution channel and length of use**
 - Wet properties versus dry



Sustainable Packaging



- Source Reduction
- Compostable, conditions and trigger
 - Industrial
 - Home
- Recyclable
- Post consumer recycle content
- Bio polymers
- Fiberboard
 - Cellulose
 - Bamboo
 - Sugarcane





Sustainable Packaging Summary



- Suffice it to say that a single packaging choice can have many ecological repercussions, and these can sometimes be contradictory.
- What may be the most sustainable solution for one product or particular market might not be the same elsewhere.
- Whatever your solution, it has to be consistent, and you need to be able to back it up with science!
- By the time the consumer uses the package over 90% of its job has already been done.
- Meanwhile, much additional research is required so that socially responsible corporations and governments can ensure that the measures they adopt really do lead to a more sustainable society with a minimum of unintended consequences.



Conclusion



- **Optimally** designed sustainable packaging plays a critical role
- The fundamentals must be covered
- At the end of the day what are the customer requirements and what creative technologies can be brought to bear to address those requirements
- We supply a technical support service that happens to include sustainable packaging
- Packaging must be an integral part of the entire new product development process
- The technology and supply of packaging is a global effort in a global market







JASON GRANT, PHD

W.G. Wysor Professor of Agriculture and Director
of the Center for Agricultural Trade, Virginia Tech



COLLEGE OF
AGRICULTURE AND
LIFE SCIENCES
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CENTER FOR AGRICULTURAL TRADE

Assessing the Impacts of Canada's Plastic Packaging Regulations: Implications for North American Fresh Produce Trade

Jason Grant, W.G. Wysor Professor of Agriculture & Director, Center for Agricultural Trade, Virginia Tech
Nicolas Legrand, Research Assistant Professor, Center for Agricultural Trade, Virginia Tech

Presented at the Farm Foundation Forum: *Unwrapping Packaging Regulations Impacting Agricultural Trade and Sustainability*, April 30, 2024

*****The findings and conclusions presented here are those of the authors***

Background

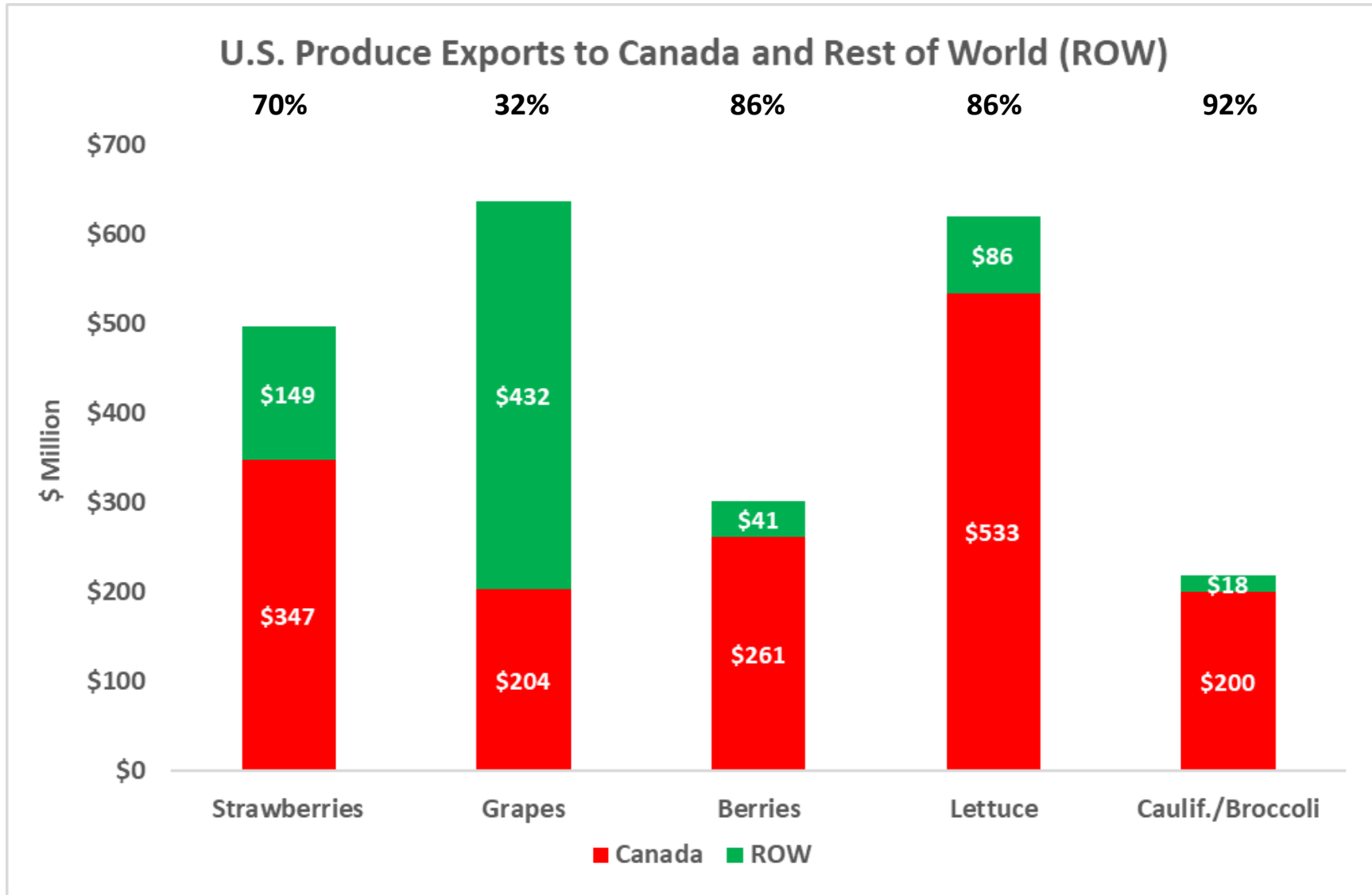
- Plastic packaging: a ubiquitous feature of fresh produce distribution & trade
- VCMi surveys: ~ 64% of total volume across 20 produce categories sold in plastic packaging
- In 2023, ECCC published a pollution prevention planning notice (P2 Notice) to reduce environmental impact of primary food plastic packaging as part of agenda to address plastic waste and prevent pollution
- Absent breathable plastic packaging, fresh-cut produce has 1-2 days of marketable shelf-life (rapid dehydration); compared to 10-15 days with optimal packaging



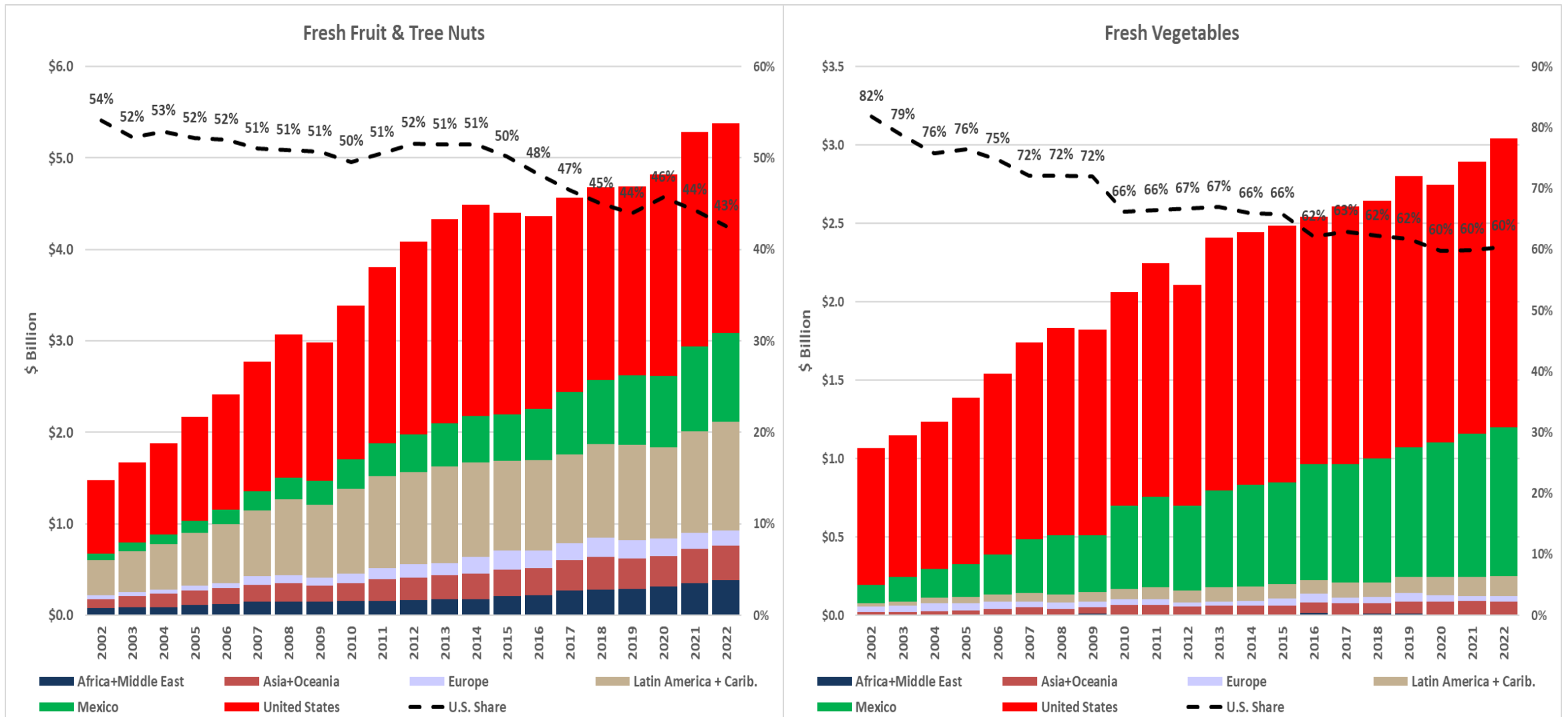
As of right now, there is no viable alternative to plastic modified atmospheric packaging that guarantees that same level of:

- *Food safety*
- *Quality*
- *Integrity*
- *Affordability & Convenience*

Select U.S. Fresh Produce Exports to Canada and Rest of World (ROW)

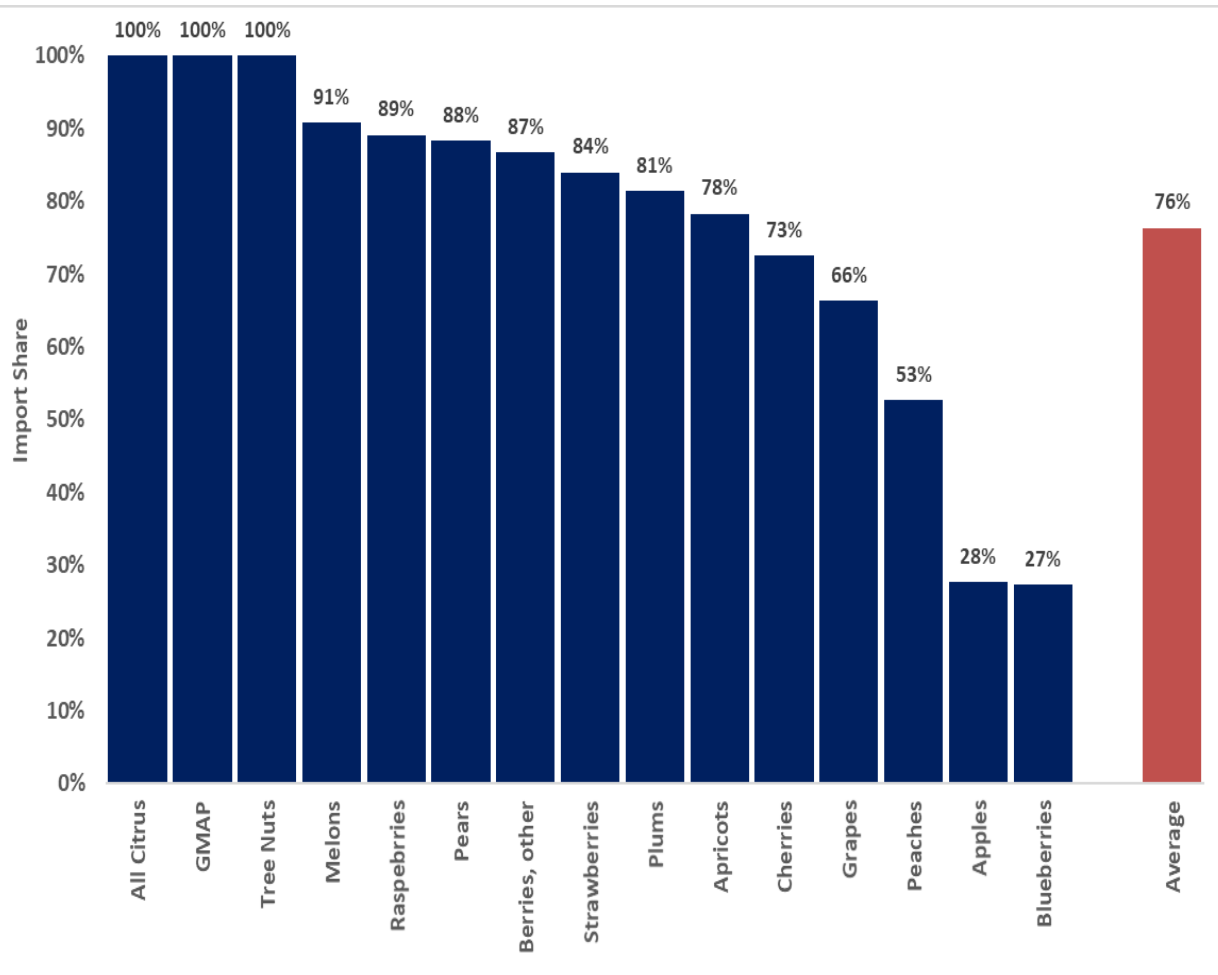


Canadian Imports of Fresh Produce & Share Sourced from the U.S.

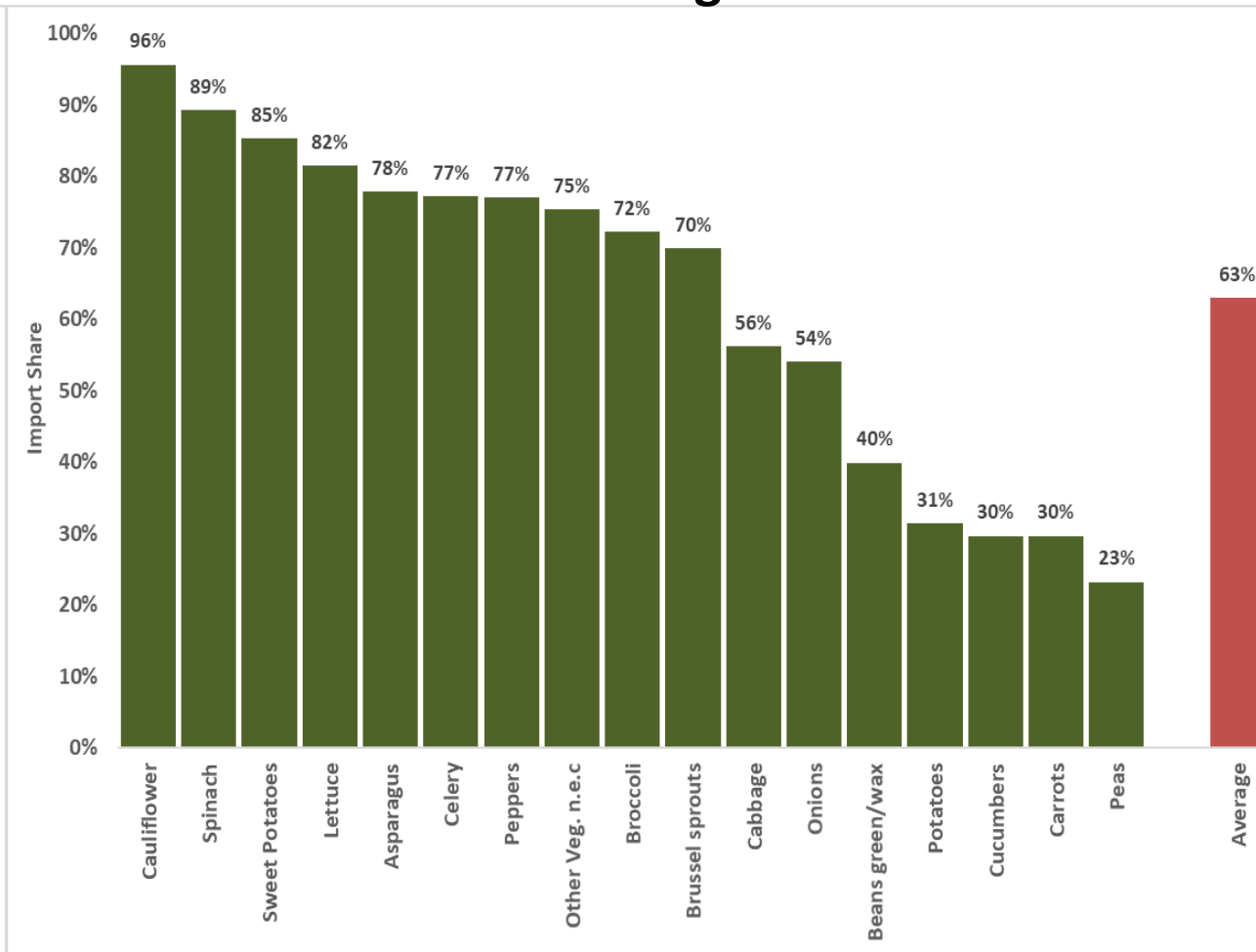


Share of Imported Fresh Produce in Total Domestic Availability in Canada, 2022

Fresh Fruit & Tree Nuts



Fresh Vegetables



Economic Impact Assessment:

Projecting Price and Per Capita Availability Implications from 25%, 50% and 62% Import Supply Reduction in Canada

	2021/22 Avg. Retail Price in Canada	Expected Price Change in Canada	Expected Price Level in Canada	2022 Per Capita Availability	Expected Chg. In Per Capita Availability
<i>Unit</i>	<i>USD/kg</i>	<i>% Chg.</i>	<i>\$USD/kg</i>	<i>kg/person</i>	<i>kg/person</i>
Fresh Fruit					
Raspberries	\$14.23	53%	\$21.73	0.34	0.17
Strawberries	\$8.98	36%	\$12.20	3.41	2.01
Grapes	\$6.83	25.5%	\$8.57	7.22	4.84
Fresh Veggies					
Spinach	\$16.04	37.5%	\$22.04	1.09	0.63
Cauliflower	\$6.10	32%	\$8.08	3.15	1.96
Lettuce	\$8.46	30%	\$10.97	9.37	6.0

Thank you

Contact Info*:

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<https://aaec.vt.edu/people/faculty/grant-jason.html>

Center for Agricultural Trade (CAT)

<https://aaec.vt.edu/extension/Agricultural-Trade-Center.html>

More Information:



Building trust and understanding at the intersection of agriculture and society.



Assessing the Market and Trade Impacts of Canada's Proposed Plastic Packaging Restrictions

Assessing the Market and Trade Impacts of Canada's Proposed Plastic Packaging Restrictions

February 2024

By Jason Grant and Nicolas Legrand
Grant (jhgrant@vt.edu) is W.G. Wyszor Professor of Agriculture and director of the Center for Agricultural Trade at Virginia Tech. Legrand (nlegrand90@vt.edu) is





KEVIN KELLY

CEO,
Emerald Packaging



Sustainable Flexible Packaging Today





Sustainable Flexible Packaging Today

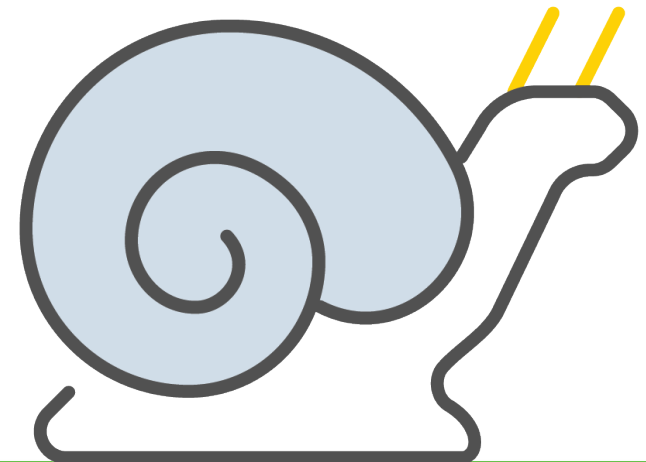
Remarkable innovations and pilot programs in sustainable, flexible packaging





Sustainable Flexible Packaging Today

Slow adoption of new technologies
and low recycling rates for flexible
packaging





Sustainable Flexible Packaging Today

Economic Barriers





Sustainable Flexible Packaging Today

Cost sharing between
producers and consumers and
the role of EPR legislation







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**Farm Foundation Forum
Global Ag Trade and
Sustainability: Gaps
and Opportunities**



Tuesday, May 14, 2024
9 a.m. CT on Zoom

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