



PROCOLOMBIA

EXPORTS TOURISM INVESTMENT COUNTRY BRAND

Packaging Trends in Canada
Webinar

Canada In Top Ten for Flexible Packaging Markets

FIGURE E.16 Top ten flexible plastic packaging markets, 2003

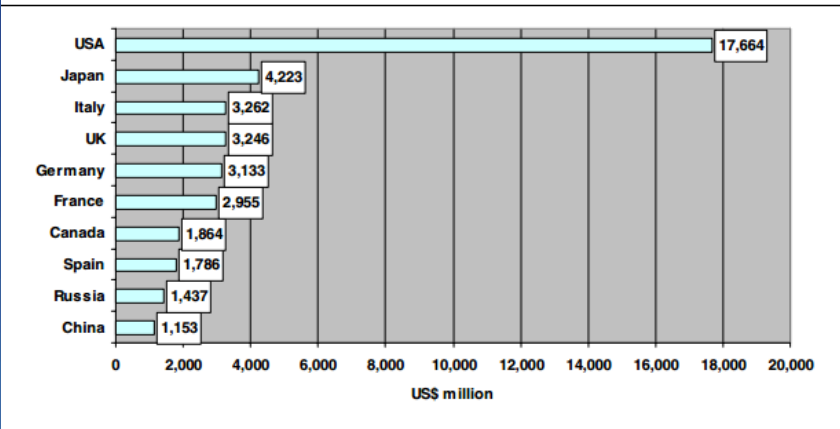
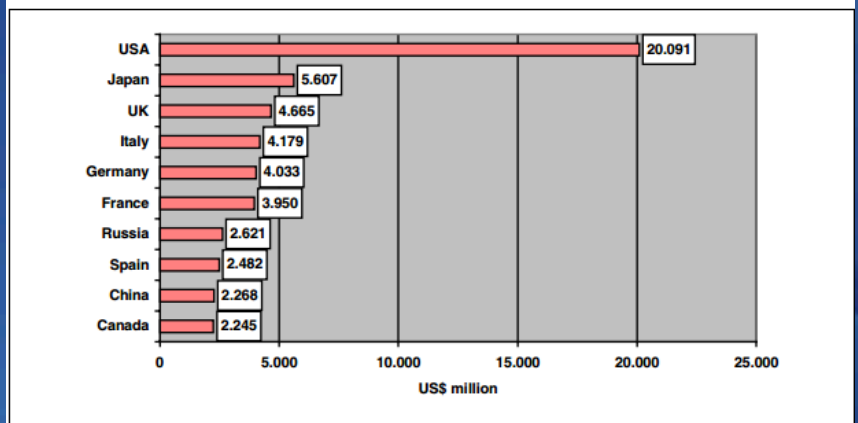
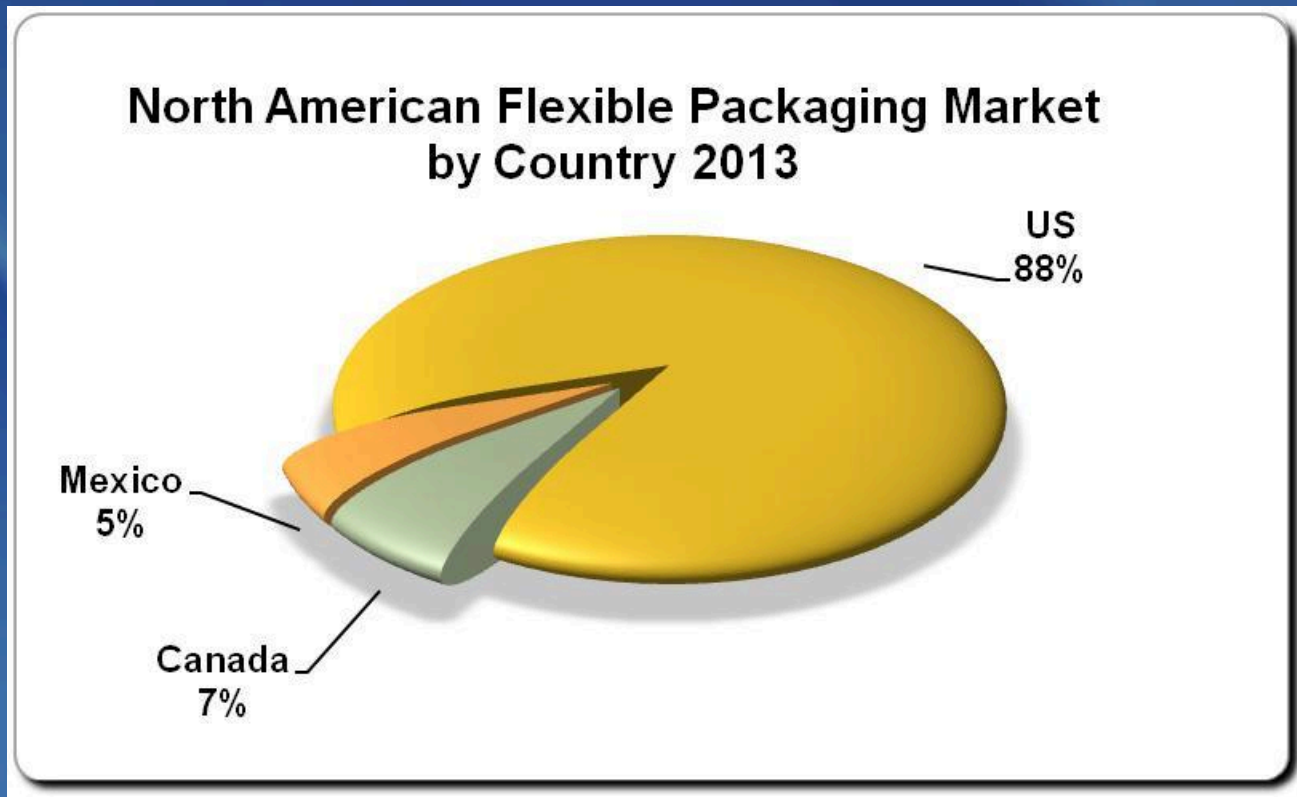


FIGURE E.18 Top ten flexible plastic packaging markets, 2009



The flexible packaging market in North America is valued at \$20.5 billion dollars



Market Sectors

Food and Beverage

- Canadian Private label packaged food market reached C\$6.4 billion in 2012 and had 12.7% of the market share
- From 2007 to 2012 the market grew at a compound average annual growth rate of 4.8%
- Private label launched over 4900 packaged food products from 2008 to 2012

Market Sectors

Health Care

- This industry will fuel the growth of the flexible packaging market and is one of the key contributors to the ascending growth witnessed in the market for flexible packaging
- Compound Annual Growth rate of 7.1 % from 2012 to 2018
- Biggest growth because consumers are requesting more generic drugs and because packaging trends are changing from rigid to flexible.

Innovation

1. Stand Up Pouches

- Traditional Stand Up Pouches
- Shaped Pouches
- Retort and Boilable Pouches
- Liquid Stand Up Pouches

Traditional Stand Up Pouches



Retort or Boilable Pouches

- Retort pouches – A retort package is cooked after it is filled at high enough temperatures long enough to kill bacteria and microorganisms that can spoil food.
- Boilable pouches – The package is filled and boiled at high temperatures with the product inside.



Retort or Boilable Pouches

- Retortable and boilable pouches are becoming increasingly more popular. They are easier to open (versus cans), weigh much less, and are said to have a smaller environmental impact versus metal cans and glass jars.
- Additionally they minimize loss from denting or breakage and enable package innovations such as cook in capability or food product innovation such as tuna packed without added water or oil.



Shaped Pouches

- The current generation of packaging can produce more bag shapes and styles than ever. This is important to consumer packaged goods companies which are hungry for new shapes that stand out on the shelf.



Liquid Pouches With Fitments



Liquid Pouches With Fitments

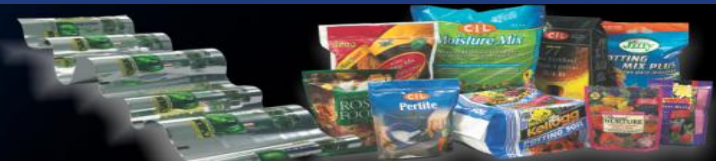
- Flexible liquid pouches are starting to replace heavy glass bottles and bulky bag-in-box packaging.
- These lightweight pouches are a durable, convenient and eco-friendly way to bring your product to the market.
- There are variety of different style and types of fitments and glands that can be considered for this packaging.
- This style of packaging will help in the wine and spirits market with some flaws that are a result of cork contamination in a traditional wine bottle. With a wine bottle and cork there is a threat of oxidation. With the taps and fitments on this style of packaging it will eliminate the oxidation and preserve the contents for a longer period of time.



Innovation

Matte and High Barrier films

- Matte PET and OPP films
- EVOH film
- Co-extruded nylon/PE
- Forming webs



Industrial Valve bags

- There is a substantial need for manufacturers of industrial valve bags in Canada. The list of manufactures was always small but it is even smaller now that two major U.S. companies have closed their plants in Canada. It has left the small and medium customers without a supplier for their product.



Consumers Demand More Transparency & Responsible Sourcing

- Consumers want safe, quality products, but they also want to know that every step of the supply chain is focusing on employee welfare and environmental conditions.
- Maintaining an ethical supply chain generally results in a higher cost for supplies and labor and higher prices for the consumer. However, the increasing consumer awareness of and demand for ethical sourcing is increasing the need for manufacturers to consider ethics in sourcing.



Consumers Demand More Transparency and Responsible Sourcing

- Are your companies- AIB, HACCP or ISO approved. Have you had a third party audit?
- Menu Foods recall
- Taishan Gypsum recall



Compostable and Recyclable Film

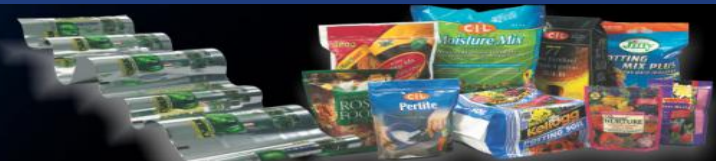
- Packaging waste is a major issue.
- Recycling works for many papers, plastics and metals
 - Recycling centers in cities and municipalities that can actually recycle the products. They need to have the programs in place
- Biodegradable packaging- Typically based on PLA, biodegradable packaging is a set of polymers that are derived from renewable raw materials like starch, cellulose, soy protein, lactic acid



Compostable and Recyclable Film

Problem with compostable film:

- PLA supply
- What do you do with the biodegradable package once your done with it. Cities and municipalities must have a green waste collection program
- Biodegradable and compostable plastics currently cost drastically more than traditional plastics. This price difference deters many companies who are still focused on the traditional bottom line



Partnerships

- Distribution Houses – Crawford Packaging
 - Duropac
 - Unisource
 - Norstar Packaging
- Agents or Salesmen



Trade Shows

- Trade Shows – Pack Expo – Toronto 2015
 - Las Vegas 2015
 - Chicago 2016

Private Label Show – November 2015-
Chicago, IL

National Pet Industry Trade Show –
Toronto- September 2015

Seafood Expo North America – Boston-March
2016



Thank you for your time and attention



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