



The Challenge for Canada

EARNING OUR SHARE

The Bioeconomy

- ▶ Health and pharmaceuticals
- ▶ Food production
- ▶ Fuels
- ▶ Biochemicals
- ▶ **Bioplastics**



Bioplastics – Applications

- ▶ Containers
- ▶ Utensils
- ▶ Packaging
- ▶ Auto parts
- ▶ Carpet fibre
- ▶ Piping
- ▶ Phone casings
- ▶ Medical implants

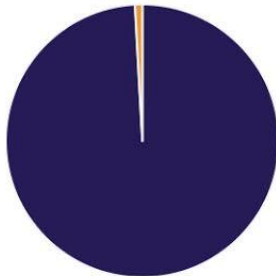


Market Forecast

GLOBAL PLASTICS MARKET

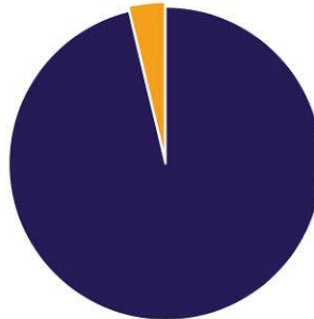
- Bioplastic market expected to grow at **30% CAGR 2013-2030**
- Traditional plastics expected to grow 3% annually

Bioplastics:
<1% market share
\$3.75B





\$455B
2013

4% market share
\$21B

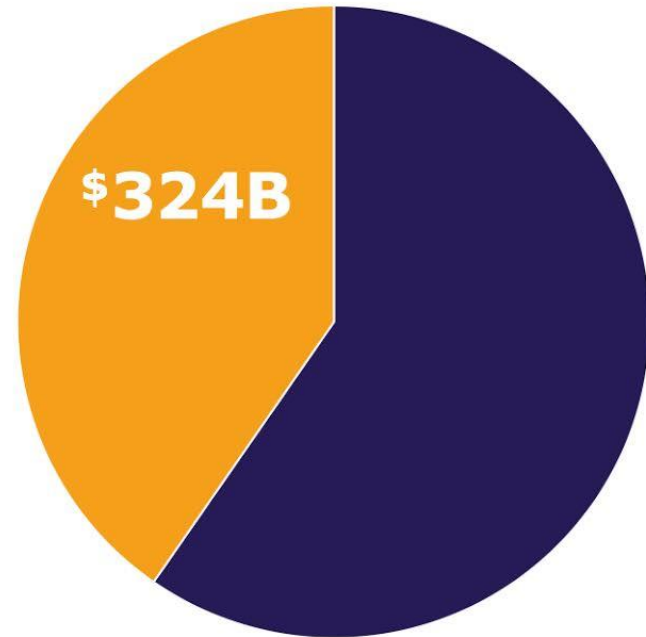


\$540B
2019

 Bioplastics

 Oil-based plastics

40% market share



\$803B
2030

Source: Grand View Research 2014, European Bioplastics 2013, BCC Research 2014, Nexant Inc. 2012

The Potential

Cdn Petrochemical Industry 2016

- ▶ Shipments: \$53B
- ▶ Employment: 87,500

US Petrochemical Industry 2016

- ▶ Shipments: \$820B
- ▶ Employment: 800,000

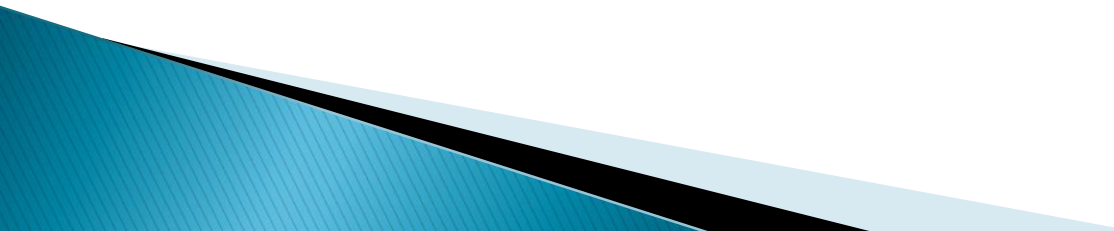
Cdn Bioplastics Industry 2030

- ▶ Shipments: \$6B
- ▶ Employment: 10,000+

Petrochemical industry

Bioplastics – 'Our Share'

Some of the Challenges

- ▶ **Big corporate leaders?**
 - ▶ **SME growth potential?**
 - ▶ **Regulatory environment?**
 - ▶ **Product manufacturers?**
 - ▶ **Consumer demand?**
- 

EARTH Modus operandi

- ▶ **Surface the issues**
- ▶ **Mobilize the stakeholders and the public**
- ▶ **Provoke**
- ▶ **Drive the agenda, fill the gaps**
- ▶ **Celebrate success and – move on**



EARTH