



Stuff in Flux 2:

Playbook for Circular Innovation



Share Reuse Repair
INITIATIVE



circular
citizen



ALICE LABS

Hello innovators, intrapreneurs & entrepreneurs in Canada.

This playbook is for you and for those you need to convince that there is current and future demand for circular products and services. Circular means innovating in a way that designs out excessive waste and carbon emissions and keeps products in use.

You see, if you don't have circular principles and carbon emissions reduction on your radar, you shouldn't create new stuff. For Gen Z and Millennials, brands no longer have the same power over identity. They have a different relationship to their stuff that brands must understand if they want to stay relevant.

Old school innovations were spurred by what competitors were doing or by improving on an existing product. New circular innovation looks to Leading Edge consumers. Their preferences for stuff are shaping the four new market opportunities included in this playbook. Use those market opportunities — Useful Stuff, Joyful Stuff, Stuff Connecting to Nature, Flowing Stuff — as start points to create new concepts early in your innovation process for consumer goods such as clothing, electronics, housewares & toys.

WHAT'S INSIDE

→ The first half (slides 2–36)

is to inspire your team with insight in the stuff people want today and that will increasingly become the norm in the next 3–5 years.

→ The second half (slides 37–50)

is a workbook to guide your team's thinking when designing for circular innovation.

We believe that if you don't have circular principles and carbon emissions reduction on your radar, you shouldn't create new stuff.

Stuff in Flux

In 2016, global strategic management consultancy Alice Labs asked this question: 'Is Our Relationship to Stuff Changing?'

The answer was yes.

Their research found four new market opportunities in seven countries (see [full report](#) published by Sitra).

Canada and Canadian businesses and innovators were not involved.

But in 2022 "Stuff in Flux Chapter 2" changed that.



Sitra Report

The Team

Canadian Project Team

Lindsey Boyle & Rosemary Cooper are the project team that managed the Canadian phase of the Stuff in Flux 2 project, in partnership with Alice Labs.



Lindsey Boyle

*Founder & Chief Strategist,
Circular Citizen Consulting*



Rosemary Cooper

*Project Director, Share Reuse
Repair Initiative & Part-Time
Faculty, BCIT School of Business
(Circular Economy)*



Global Lead

Oskar Korkman & Sharon Greene are global strategic management consultants and the creators of the global Stuff in Flux program and proprietary research methodology.



Oskar Korkman

*Co-Founder,
Alice Labs*



Sharon Greene

*Co-Founder,
Alice Labs*



Stuff in Flux, Chapter 2

Why Study the Leading Edge?

We study the Leading Edge not to target them as customers, but to identify future market opportunities¹.

The Leading Edge are part of most cultures around the world and in Canada represent approximately 13% of the population.

The characteristics of the Leading Edge, previously identified by Alice Labs², include:

- Being recognized in their circles as people who know about new stuff.
- Feeling a connection to the world around them, and believing their actions can create change.
- Being creative but not radical, they push for change from within the system.

¹ See [appendix](#) for Alice Lab's Stuff in Flux 2 methodology

² For further detail on the Leading Edge, see 'The Changing Relationship Between People & Goods', Korkman & Greene, May 2017 pg 12.

Leading Edge consumers are:

- + Curious and open-minded
- + Push their own limits
- + Success-oriented
- + Ethical and altruistic
- + Leaders, with potential to influence others



Why focus on Stuff?

For businesses selling consumer products, most emissions are indirect emissions that occur in the value chain, created by the manufacturing of 'stuff'.

- Globally, it is urgent to decrease the need for virgin resources and to address the biodiversity loss caused by harvesting material inputs to new stuff.
- Supply chains have become increasingly more complex, and the world's climate-induced and geopolitical upheavals indicate that we may be entering an extended era of supply disruption.
- Developments in, for example, digital fashion show that it may be useful to explore whether the consumption of unsustainable materials could be partially substituted by digital experiences.

For example: Apple's 2019 Carbon Emissions Data*

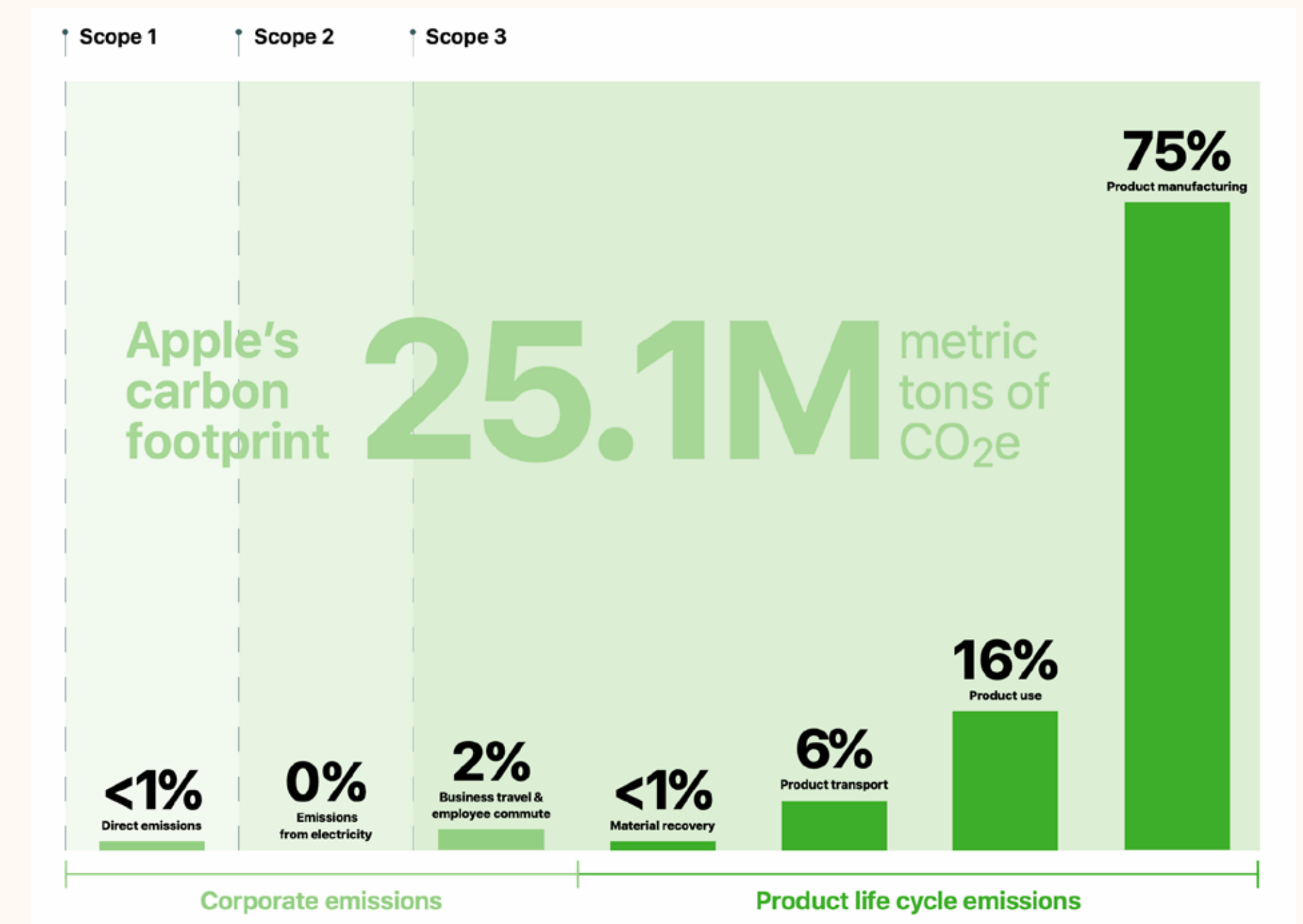


Figure 1: Apple Inc. (2020). [2020 Environmental Progress Report](#).

Global transformation in our relationship with Stuff

**'Stuff in Flux 2' teaches us that a transformation is underway:
a desire to consume better and to recognize when we have enough.**

- The beginning of a separation between purposeful vs excessive consumption.
- A drop in excitement related to shopping and buying.
- Awareness about scarce resources and material flows seen for the first time in a statistically significant/mass market way.
- An active search for brands that align with one's values and that do positive things in society or for the planet.

Yet, this transformation is not smooth...

It is full of tensions and contradictions that reflect how consumers feel conflicted by the necessary choices in their everyday lives.

73%

of people agree that they always consider the afterlife of the things they buy and usually choose things that won't go to landfill even if they cost more.*

67%

of people agree that where feasible, they consciously choose products made from natural material rather than synthetics.*

58%

of people agree that they prefer to spend time out in nature rather than shopping for new things.*

* The figures presented here are derived from a seven-market quantitative survey as part of Alice Labs 'Stuff in Flux 2' project (conducted in 2021-2022) which led to publishing of this report.

What is a 'Market Opportunity'?

Market Opportunities are the keys that turn consumer attitudes and behaviors into business opportunities.

Here's how the four Market Opportunities were created:

- A **qualitative** deep dive to understand Leading Edge consumers (300 hours of interactions – interviews, tasks and Hackfests). This phase illuminated the global transformation underway and the tensions Leading Edge people feel in making their choices about 'stuff'.
- A global survey, involving Canada, the US, Brazil, China, Germany, India, Russia, was used to **quantify** change and identify market opportunities, both for their potential today and how they could evolve in the next three to five years.
- The **synthesis** of the qualitative and quantitative insights led to the identification of the four new market opportunities.

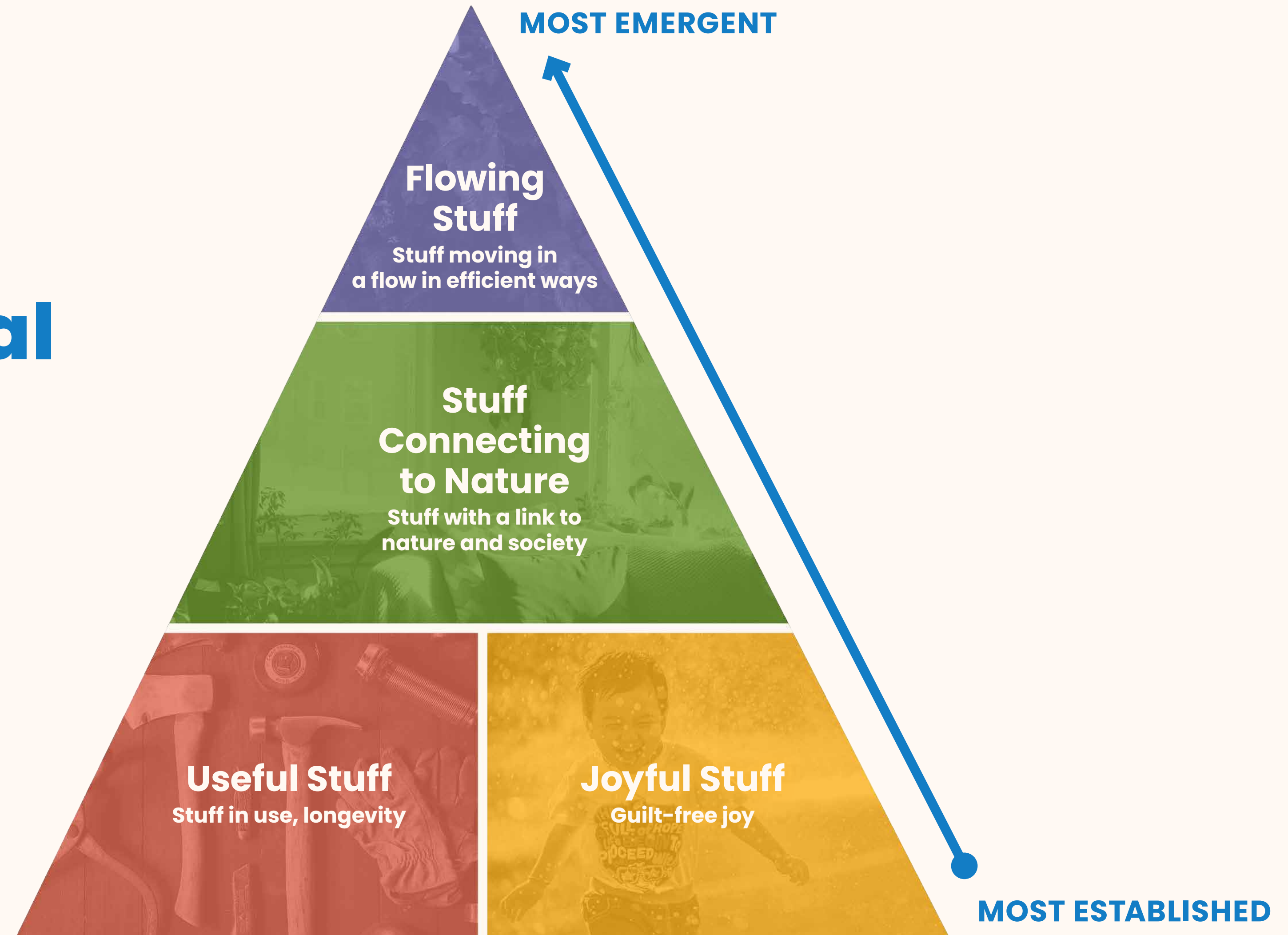
Note: see [appendix](#) for Alice Lab's Stuff in Flux 2 methodology.

Who do the Market Opportunities apply to in Canada?

- + The Stuff in Flux 2 Market Opportunities reflect demand amongst Canadians overall (general population).
- + You will also find data specific to the different generation(s) your business is targeting – Gen Z, Millennials, Gen X and Boomers.



Four Global Opportunities with Mass Market Potential in Canada





OPPORTUNITY
Useful Stuff

KEY INSIGHT

Choosing things that will be used for a long time.

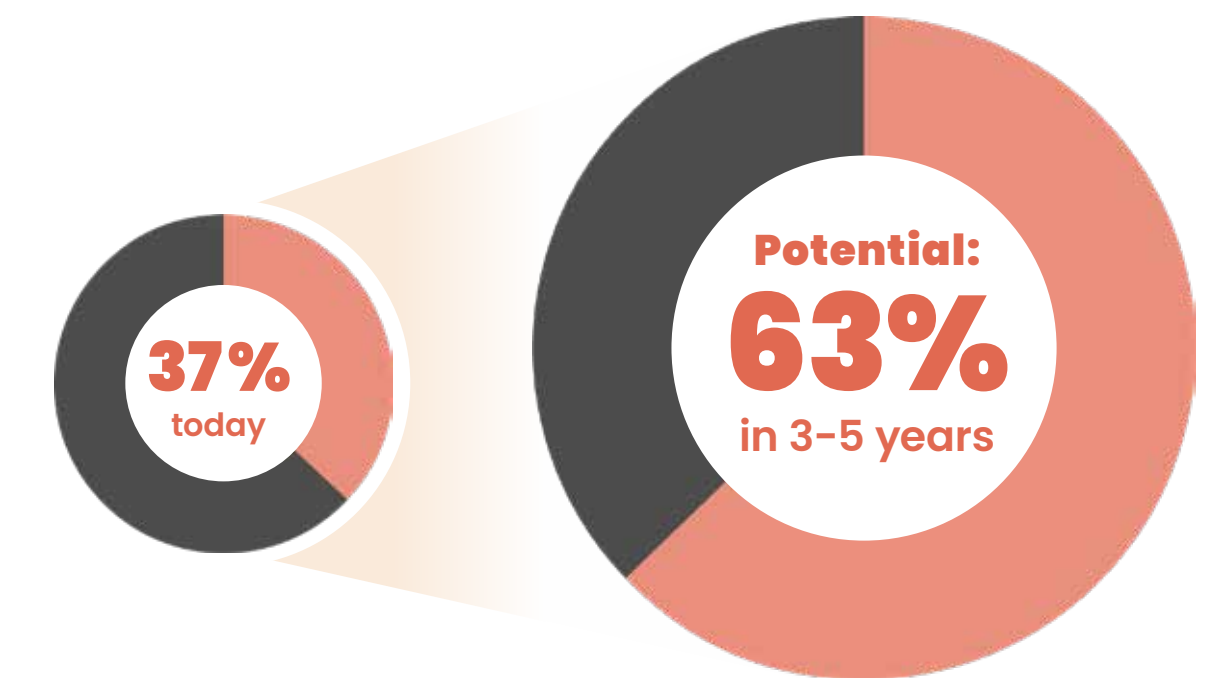
Behaviour Change

Our research found several behaviours common to the Leading Edge which exemplify how this opportunity manifests itself in people's everyday lives.

The focus by the Leading Edge is clearly on longtime use and product reliability. This opportunity is far from the desire to impress and be trendy.

- **Judging future use:** The Leading Edge are attracted to the stuff they believe will have a meaningful place in their life long-term. They look past the novelty of a new thing to assess how they might use the product in the years to come. With this disciplined approach, reliability and repairability are priorities. Materials must also look and feel durable.
- **The weight of idle stuff:** The Leading Edge feel burdened by things sitting unused, taking up space or adding to clutter in their home.
- **Easy ownership:** For the Leading Edge, stuff needs to be convenient to own. They like companies that provide ongoing care and repair support. The Leading Edge also want convenient ways to "pass products on" and give them a second life.

Percent that identify with Useful Stuff, now and in the future:



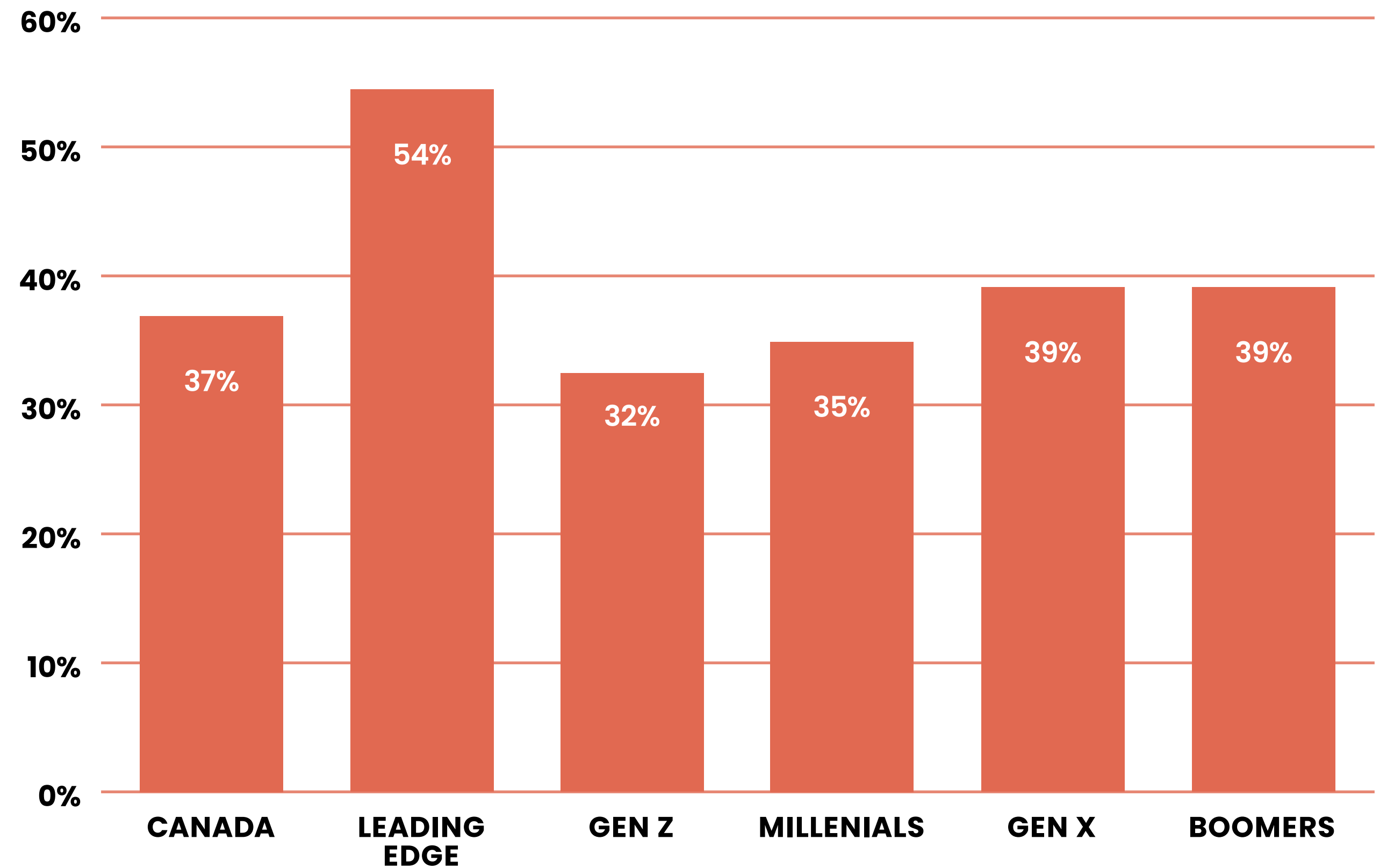
Useful Stuff is the most mainstream and established opportunity. 37% of all consumers surveyed in Canada identify strongly with this market opportunity. It's likely to keep growing as 63% indicate they strongly or somewhat identify with the opportunity, showing strong mass market potential in the next 3-5 years.

By the Generations

Choosing things that will be useful for a long time.

This opportunity resonates with all four generations, slightly more for Gen X and Boomer generations.

Useful Stuff: Size of Opportunity by Segment



The % of the population within the "segment" (e.g. Leading Edge, Millennials) that resonate very highly with the opportunity.



Photo by Olga Nayda on Unsplash

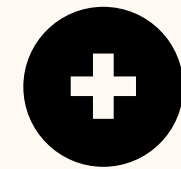
“I love these speakers (handed down by a family member). They’ve been my only piece of furniture really. They have a very cool-mid century modern quality about them. These have been transported, taken care of and they sound fantastic.”

— Canada, male, 23

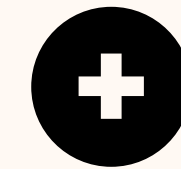
Expectations of Useful Stuff

In this opportunity area, consumers expect that a physical product has the following qualities:

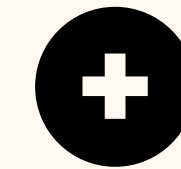
FITS LONG TERM USE



REPAIRABILITY



QUALITY MATERIALS



VERSATILITY

Offers assurance for long-term usefulness / fit for everyday life.

The buyer needs to be confident that the product will last, and the brand will take an active responsibility for repairing it if it breaks.

A focus on materials. Both quality and quantities (how materials inherently promise longevity) of different materials matter.

Versatility in use. Products should fit into different contexts and be easily adapted to different life situations.

Examples to Inspire Innovation

These brands are tapping into demand for 'Useful Stuff' that supports long-term use.



Lodge Cast Iron designs durable pans for a very long life. Pans are also extremely versatile, easy to maintain and each piece is factory pre-seasoned.



Arc'Teryx's ReBIRD™ is the home for all their circularity initiatives.

ReCARE™ supports customer use of their gear over time through care and repair service and tips.

ReGEAR™ provides a trade in and resale hub to get used gear back in action.



Canada Goose's award-winning Cold Room shows off the functional and protective features of its products where they are needed most and confirms their usefulness in the cold.



HP EliteBook 840 Aero G8 laptop receives a repairability score from iFixit of 9/10. iFixit, a collaborative supporting the right to repair movement, assigns points based on how easy the device is to open, the types of fasteners used, easy to swap modular parts, upgradeability and a free, public service manual.

OPPORTUNITY

Stuff Connecting to Nature

KEY INSIGHT

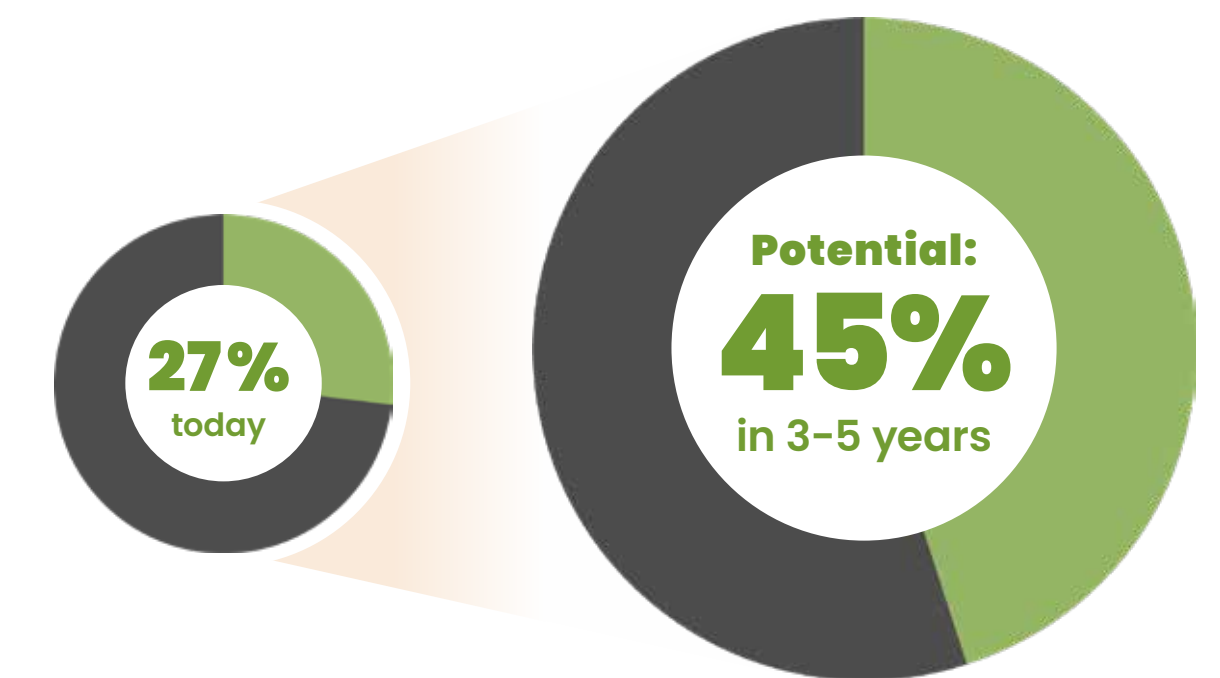
Emphasis on creating deeper connections to nature and people.

Behaviour Change

Our research found several behaviours amongst the Leading Edge which exemplify how this opportunity manifests itself in people's everyday lives, especially in Canada.

- **Experiencing nature as an alternative to consuming:** People feel closer to nature; feel invigorated by nature, not by consumption.
- **Connection to nature through materials:** Bringing the outside in and close to the body, people aspire to surround themselves with nature and natural materials to create more harmonious and calming environments.
- **Connecting to people through the way things are made:** Selecting things that are handcrafted, local, made by small brands or social ventures are all ways of maintaining connections and contributing positively to society.

Percent that identify with Stuff Connecting to Nature, now and in the future:



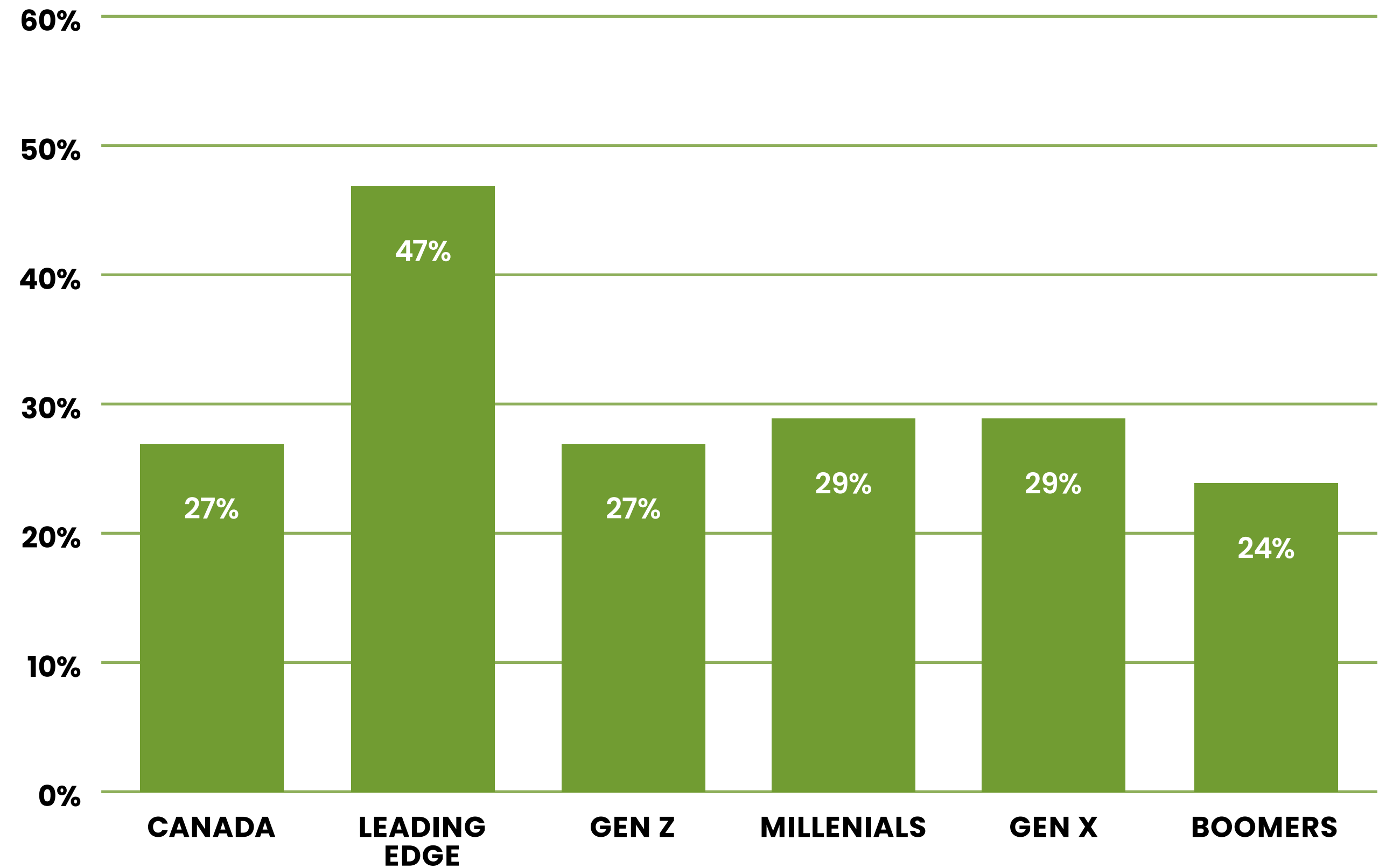
Stuff Connecting to Nature is the second most mainstream opportunity. 27% of all consumers surveyed in Canada identify strongly with this market opportunity. It has high traction as 45% indicate they strongly or somewhat identify with the opportunity, showing strong mass market potential in the next 3-5 years.

By the Generations

Emphasis on creating deeper connections to people and nature.

This opportunity resonates with Canadians across all four generations.

Stuff Connecting to Nature: Size of Opportunity by Segment



The % of the population within the "segment" (e.g. Leading Edge, Millennials) that resonate very highly with the opportunity.



Photo by Chewy on Unsplash

“...and now I’m like, why did I even need all that stuff? You know, I can go outside and go for a walk. And I think that is the trajectory things are going and I like that. And I’m trying to maintain that.”

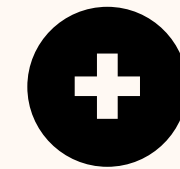
— Canada, male, 33

Expectations of Stuff Connecting to Nature

In this opportunity area, consumers expect that a physical product has the following qualities:

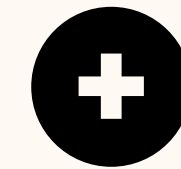
HAVE LOW NEGATIVE ENVIRONMENTAL IMPACT

There is a simplified belief now that natural materials = good for the planet. We expect that this will evolve as environmental impact information becomes more readily accessible.



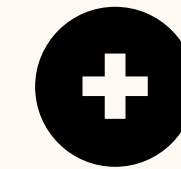
BE BASIC & ORDINARY

'Basicness' is a subtle message about equality and inclusiveness, contrasting with past expressions of exclusiveness.



BE TIMELESS

Nature is timeless and has little to do with changing fashion.



HAVE GOOD ENERGY

When things are made by people who are protected from harm (vs. exploited) or "made close to where I live" they are perceived to have good energy.

Examples to Inspire Innovation

These brands understand people want 'Stuff Connecting to Nature' with good energy.



Nutshell Coolers are sustainable, foldable coolers made from upcycled coconut husks. They perform better than most traditional coolers, keeping ice frozen more than 48 hours. By sharing transparently about their supply chain, Nutshell connects people with the farmers and materials at the heart of their products.



Foli started in response to the dramatic increase in demand for house plants during the pandemic. Customers are able to order easy-to-care-for plants online, they are picked and packed from the greenhouse and delivered to homes and businesses across Canada. Foli offers a wide variety of plants, plant care accessories and support to help people thrive as plant parents.



ecologyst is on a mission to end fast fashion and are working to change the industry for the better. They responsibly source natural materials that have 3rd party certifications to ensure ethical and environmental best practices. To support our natural environments, they avoid plastics whenever possible.



IKEA, the global brand with big circular goals for 2030, makes it possible to 'refresh your space, renew your mind' with bamboo furniture. Bamboo can grow up to 1 metre per day – making it a renewable material. It's even carbon-positive, meaning that it absorbs harmful carbon dioxide from the atmosphere as it grows.

OPPORTUNITY

Joyful Stuff



KEY INSIGHT

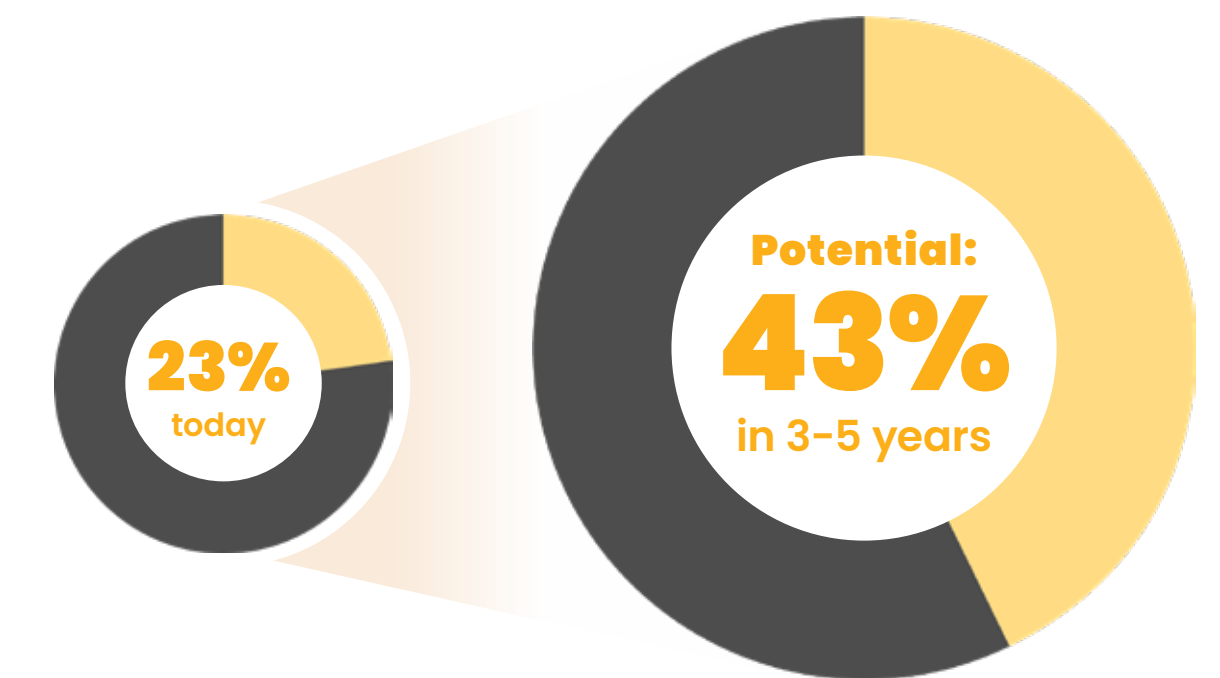
Emphasis on finding lightness and joy without feeling guilty for purchasing everyday things.

Behaviour Change

The research was conducted towards the end of 2021, a time when optimism was at a low point after almost two years of pandemic related anxiety. We found that there was a significant need for joy.

- **Mood boosters:** The most joyful things are things described as fun or delightful to use, often related to products being new, innovative or unique.
- **Life hacks:** Simple, everyday household things that make routine tasks just a little bit easier also provide a sense of joy.
- **Engage all the senses:** A good product experience appeals to all the senses – sight, smell, sound, feel. Experiencing ‘joyful’ stuff resulted in tangible, intensely positive and often personal reactions.

Percent that identify with Joyful Stuff, now and in the future:



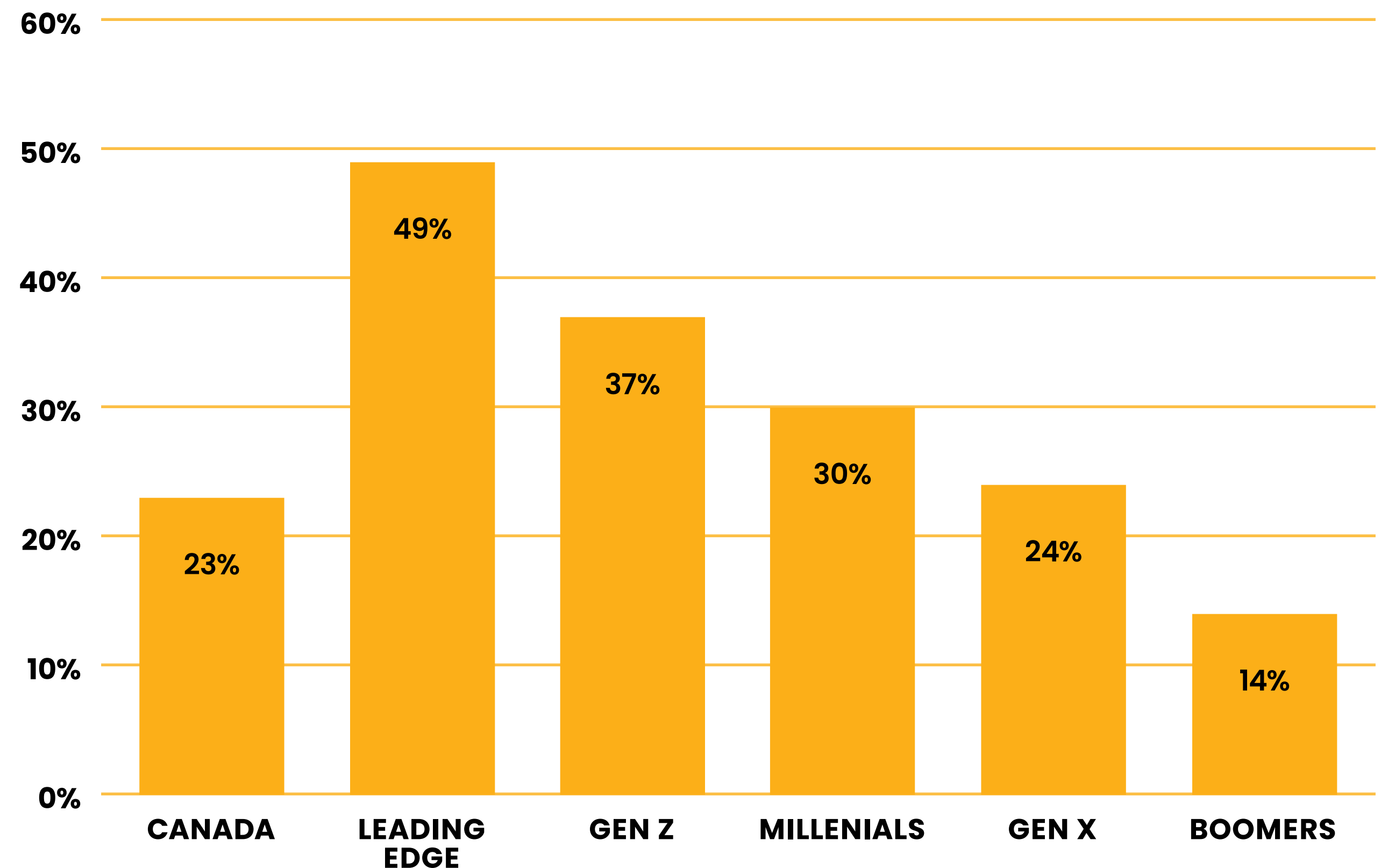
Joyful Stuff is less developed than either Useful Stuff or Stuff Connecting to Nature and is an emerging opportunity. 23% of all consumers surveyed in Canada identify strongly with this market opportunity. 43% indicate they strongly or somewhat identify with the opportunity, showing significant potential in the next 3-5 years.

By the Generations

Emphasis on finding lightness and joy without feeling guilty for purchasing everyday things.

This opportunity resonates most strongly with Gen Z and Millennials.

Joyful Stuff: Size of Opportunity by Segment



The % of the population within the "segment" (e.g. Leading Edge, Millennials) that resonate very highly with the opportunity.

Photo by Nature Zen on Unsplash



“I think we’ve definitely noticed a change since the pandemic because we have placed more joy in stuff in certain ways. One of the things I bought myself as a pandemic gift, was a really good food processor. And it’s been wonderful (...) I actually found ridiculous joy in using this food processor.”

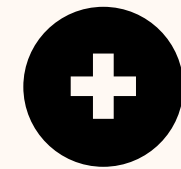
— Canada, female, 36

Expectations of Joyful Stuff

The preference in this opportunity, is for stuff with a combination of the following:

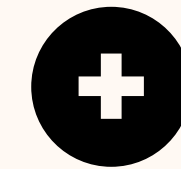
**HEIGHTEN
EVERYDAY**

It is a part of everyday life. The product makes life better, it elevates the everyday experience without creating distractions.



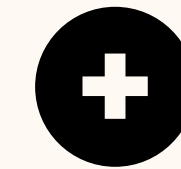
**NOT
GENERATING
GUILT**

It does not generate guilt. The product feels intentional, not careless. Responsibly made products are essential.



**BE THE
LATEST / NEW**

It is the latest/new and innovative, but in the sense of opening opportunities for learning or doing new things. This territory seems a little more traditionally "materialistic" but is an area with space for experimentation.

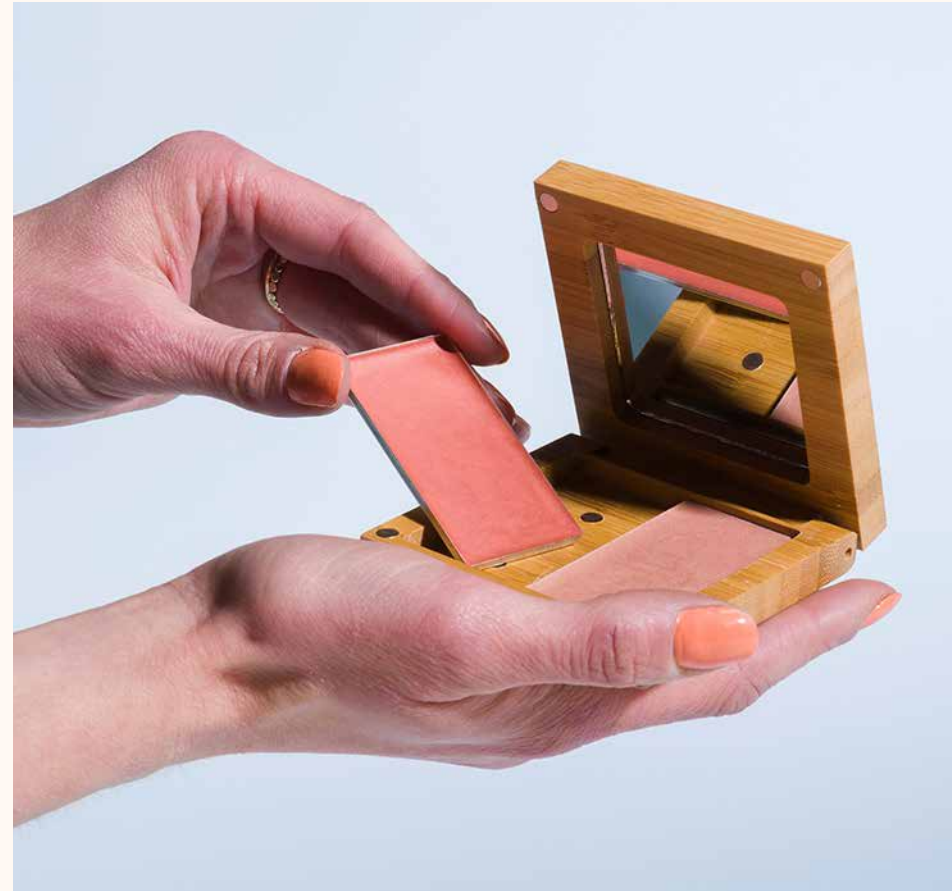


**ENHANCE
MOOD**

It makes a psychological difference in life and improves mood.

Examples to Inspire Innovation

These brands understand the need for guilt-free 'Joyful Stuff'.



Elate Beauty is industry-leading for their vegan, cruelty-free, natural makeup line. Their capsule-based system has kept 700,000 plastic containers out of landfills to date.

"We are for intentional beauty that minimizes waste and maximizes your JOY."



Nyoka Labs created the LÜMI glow stick, designed for sustainability and safety. The LUMI works via the physical phenomena in photoluminescent nanocrystals. It's non-toxic and biodegradable. Glows for 8-12 hours. Recharges with any light source for fun at parties, while camping and more.



Abeego's Mini Campfire brightens everyday outdoor occasions with a portable fire that lights quickly and extinguishes instantly. As it's upcycled from Abeego's Food Wrap production waste, you help the company get one step closer to being zero-waste.



ToyShare Experience rents toys by the day, week or month (in the Metro Vancouver area) to help reduce environmental waste. The service provides high-value toys to keep kids' playing experience meaningful and rewarding.

OPPORTUNITY

Flowing Stuff



KEY INSIGHT

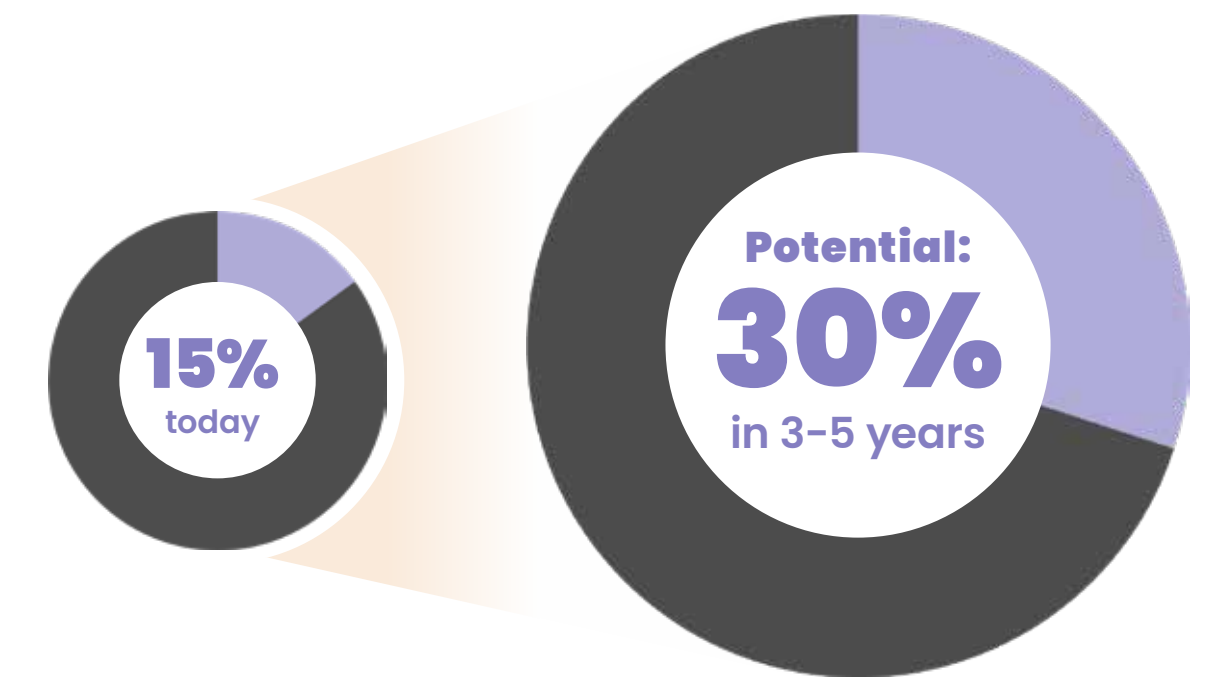
More focus on where things come from and where they go (next life of things).

Behaviour Change

Today this sustainability-first opportunity is primarily connected to the local level. However there is demand for a more industrial scale of flowing stuff.

- **Not pulling more into the system:** The Leading Edge are refusing to bring more new things into circulation and instead opting for resources / products already produced.
- **Temporary ownership:** of things while you are using them can be a more positive way of approaching effective use of resources.
- **Interest in on-demand:** On demand production and customization are seen as ways to ensure that dead stock is minimized.

Percent that identify with Flowing Stuff, now and in the future:



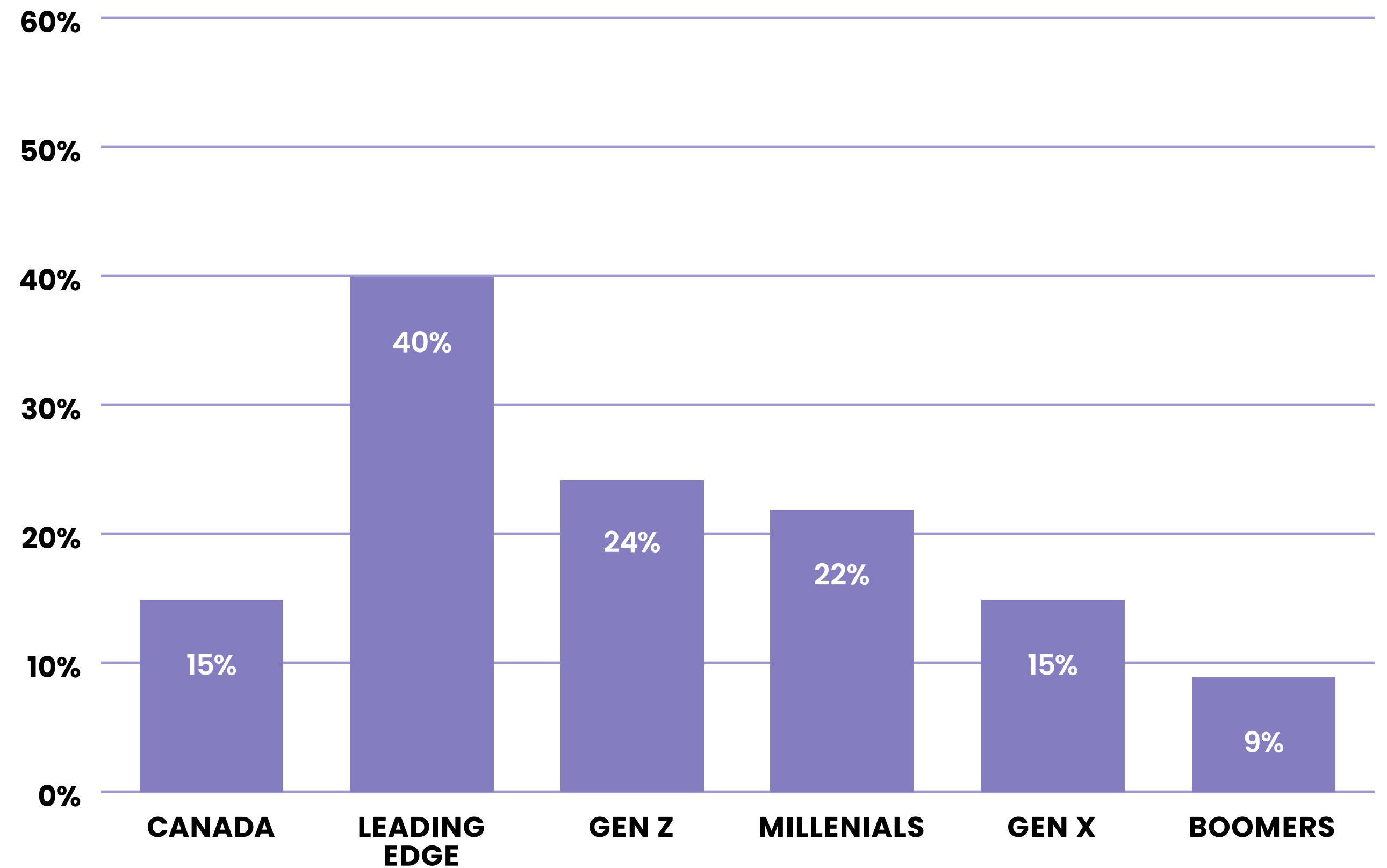
Flowing Stuff is an emerging opportunity for the mass market. 15% of all consumers surveyed in Canada identify strongly with this opportunity. 30% indicate they strongly or somewhat identify with the opportunity, showing significant potential in the next 3-5 years. Supply chain disruptions driving materials cost and scarcity will likely further accelerate the potential for Flowing Stuff in the future.

By the Generations

More focus on where things come from and where they go (afterlife of things).

This opportunity resonates most strongly with Gen Z and Millennials.

Flowing Stuff: Size of Opportunity by Segment



The % of the population within the "segment" (e.g. Leading Edge, Millennials) that resonate very highly with the opportunity.



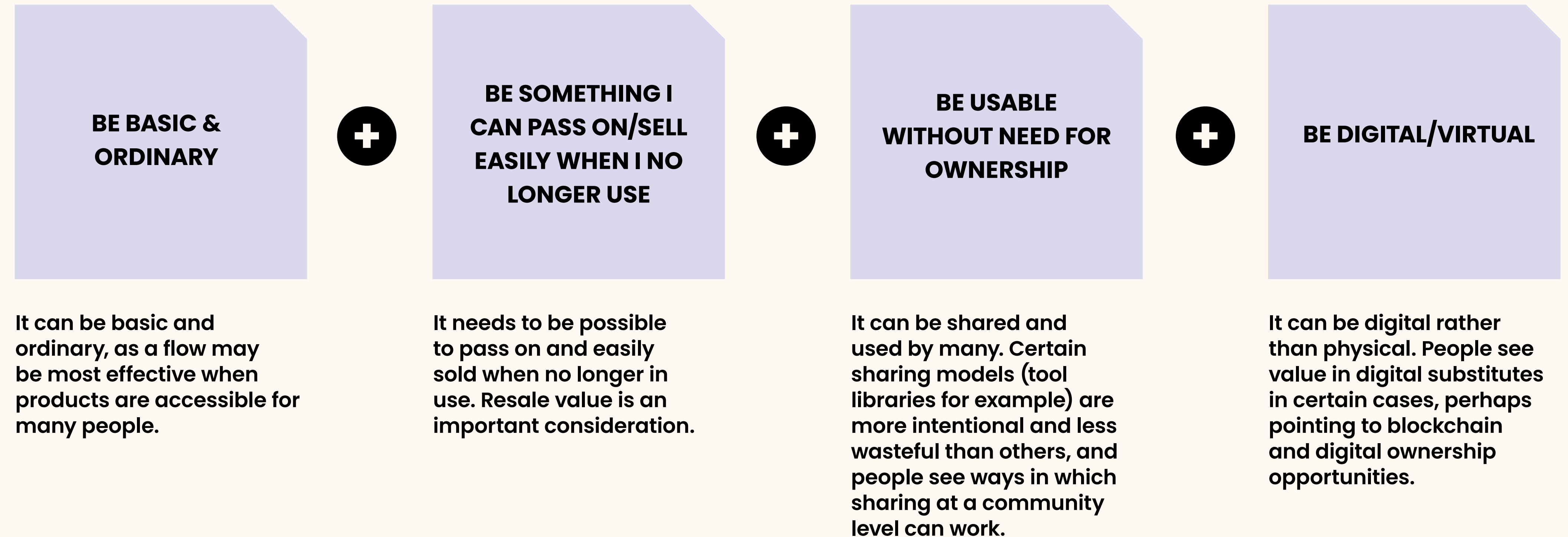
Photo by Prudence Earl on Unsplash

“I have curbed my execution on my wants considerably. I look more at second hand... and I try to put my inner stylist on and think about new ways to use the stuff I have already.”

— Canada, female, 50

Expectations of Flowing Stuff

The preference for solutions for this opportunity is a combination of the following:

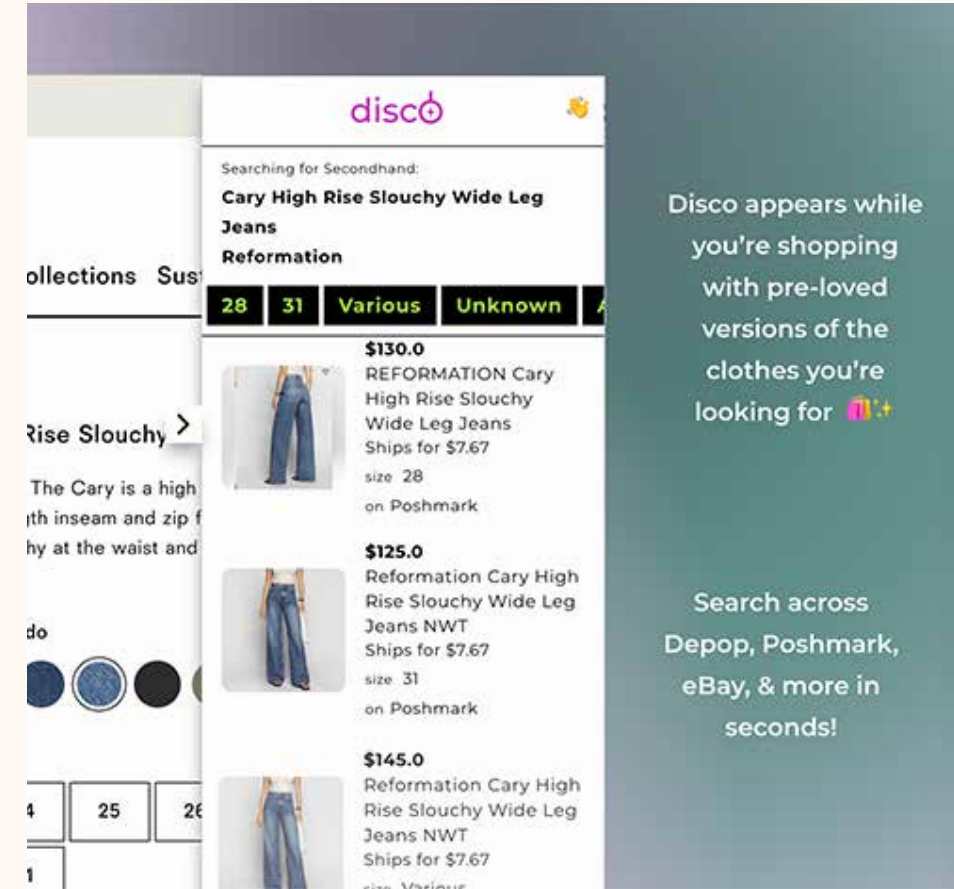


Examples to Inspire Innovation

These companies are contributing to the growth of 'Flowing Stuff' by increasing access and supply.



IKEA Canada's Circular Hubs (As-Is) provide a space to purchase IKEA items that are pre-loved, have minor damage or discontinued. Through the IKEA Family Sell-Back program, members can sell-back IKEA furniture in good, unmodified condition in return for an in-store credit.



Disco is a Chrome extension that pops up with pre-loved fashion options while you're shopping online. Shop as you normally would and Disco automatically searches and pops up pre-loved versions of items you're viewing.



Mobile Klinik is a full-lifecycle destination for smartphones, tablets, and more. Since 2015, Mobile Klinik has been extending the device lifecycle by providing risk-free repairs, quality refurbishings and reselling Certified Pre-Owned (CPO) devices online and in-store at 100+ store locations across Canada.



ANIÁN transforms post-consumer textiles into beautiful and functional garments that are truly built to last.

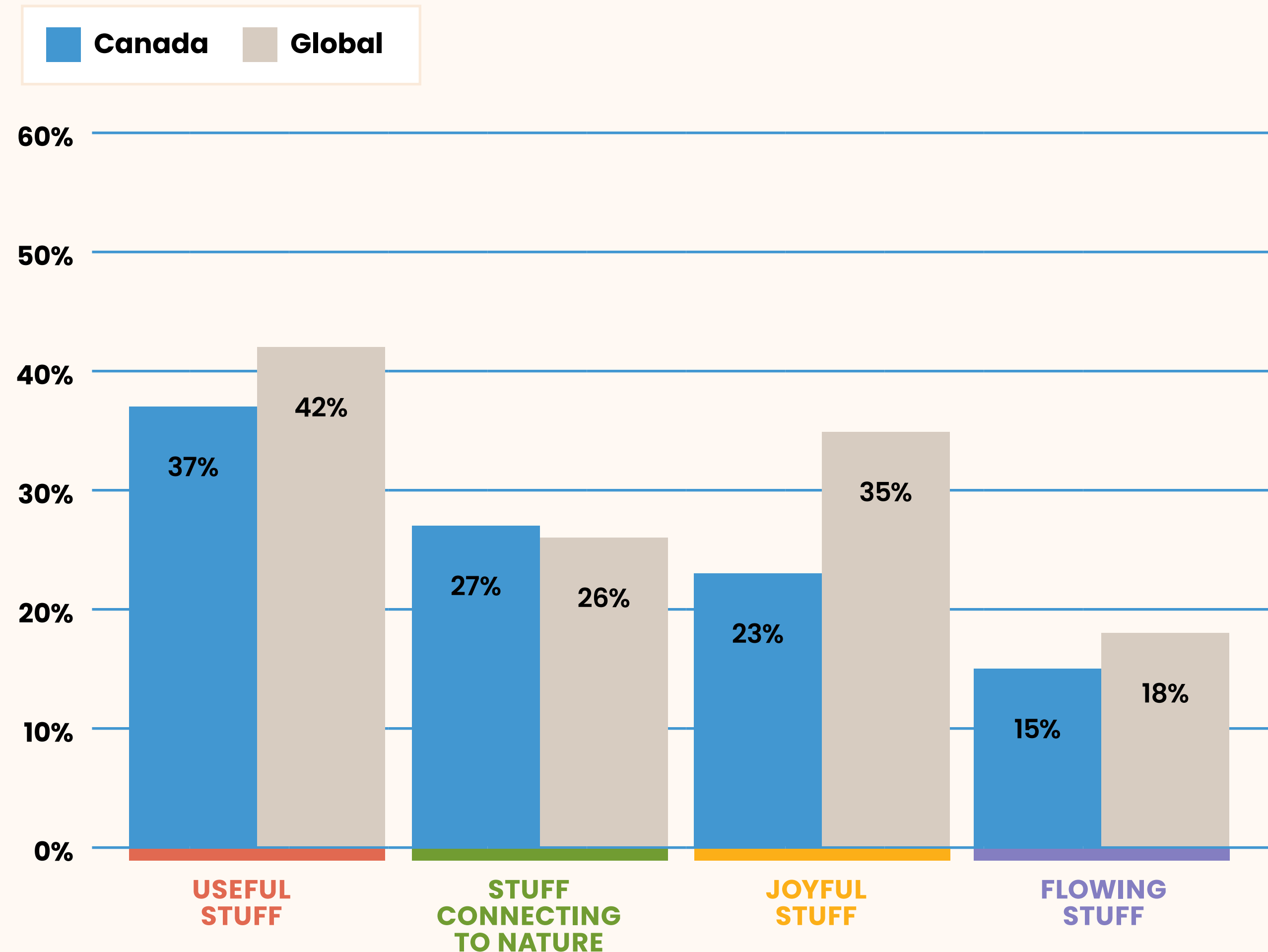
HOW DO THE FOUR MARKET OPPORTUNITIES COMPARE?

Canada vs. Global

- Useful Stuff is the most established opportunity globally and in Canada.
- What ranks second is different: globally it is Joyful Stuff where in Canada it is Stuff Connecting to Nature.

Note: see [appendix](#) for Alice Lab's Stuff in Flux 2 methodology.

Market Opportunities measured — Canada vs. Global (7 Countries)



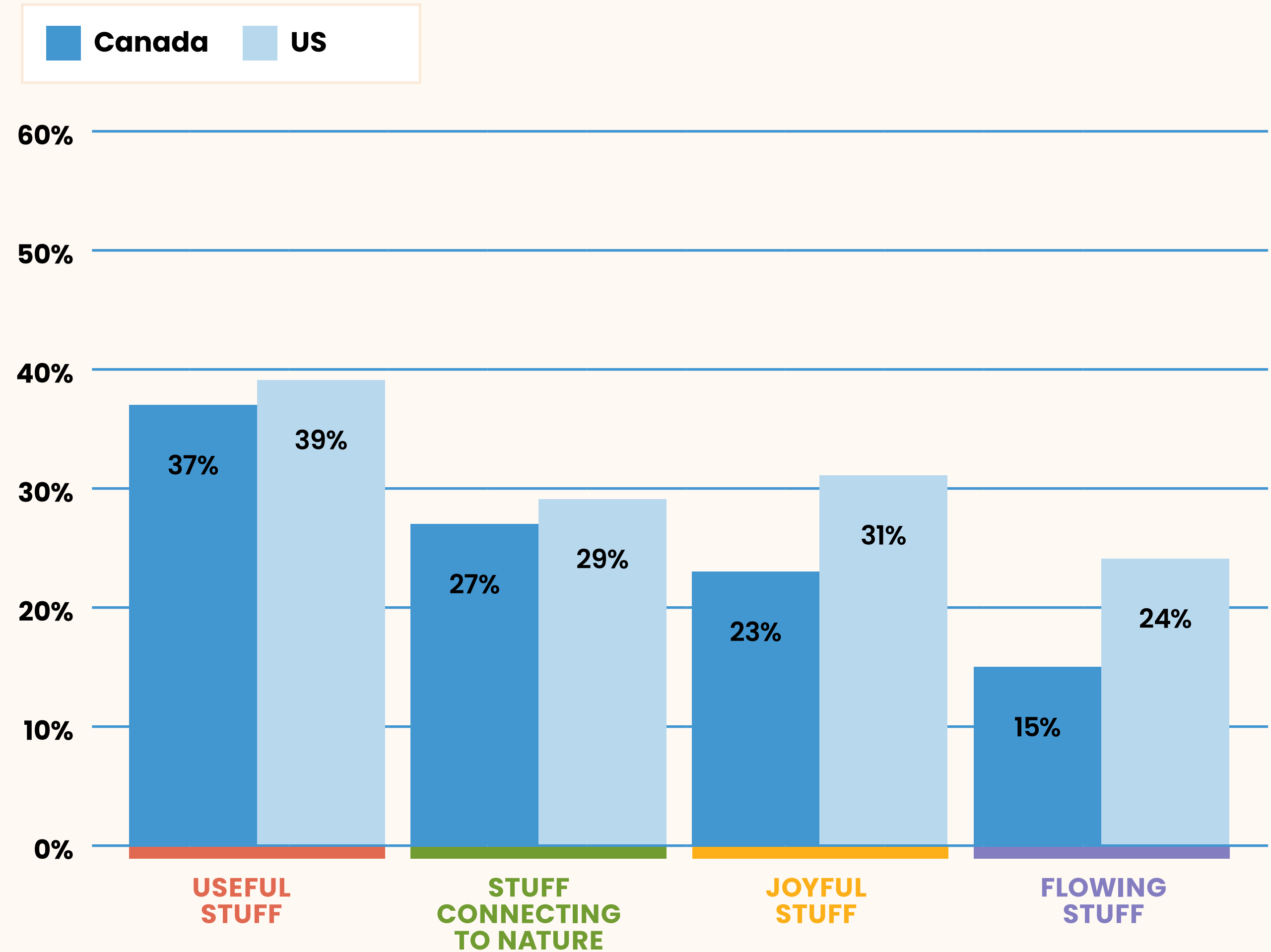
The Four Market Opportunities

HOW DO THE FOUR MARKET OPPORTUNITIES COMPARE?

Canada vs. US

- Useful Stuff is the most established opportunity in both US and Canada.
- The countries differ in what ranks second: for the US it is Joyful Stuff and Canada is Stuff Connecting to Nature.
- The overrepresentation of Flowing Stuff in the US shows a greater interest in reuse, potentially linked to more business models and community services enabling reuse.

Market Opportunities measured — Canada vs. US



The Four Market Opportunities

A woman with glasses and a white hoodie is smiling in front of a colorful mural. The mural features various abstract shapes and colors, including purple, yellow, and blue. The entire image is overlaid with a semi-transparent blue filter.

A Workbook for Innovators

**Putting Stuff In Flux 2
Market Opportunities to work
to fuel circular innovation**

Key Learnings in Action

This playbook outlines new ways of thinking about innovation and gives practical steps to help innovators in Canada embed that thinking into new concept development. At the core of the insights is how consumer demand for stuff is changing (both in Canada and globally) towards more purposeful consumption and is coupled with awareness about scarce resources and material flows.

There are four opportunities for innovators to create value for their businesses:

Useful Stuff

Innovation for long-term usefulness, post-purchase support for care, repair and next-life solutions.

Stuff Connecting to Nature

Innovation for a more positive relationship between nature and communities, with the emphasis on protecting the world's finite natural resources and regenerating biodiversity.

Joyful Stuff

Innovation for mood-elevating, guilt-free stuff and products that make life easier.

Flowing Stuff

Innovation of models that design waste out of systems and enable sharing, repair, reuse and resale to make products flow on a large scale.

There is circular innovation opportunity in each territory

Useful Stuff

- + Longevity, durability & repairability
- + Versatility
- + Next-life solutions

Stuff Connecting to Nature

- + Encourage time in nature
- + Connection to nature through materials
- + Transparency about impact on nature & people

Joyful Stuff

- + Newness & fun, responsibly produced
- + Digital substitutes
- + 'Circular' product design that makes daily life easier

Flowing Stuff

- + Circular models
- share, reuse, repair, resale
- + Upcycled materials
- + Scale / industrialize community models

USEFUL STUFF > BRAINSTORM

How can your startup or company design ‘Useful Stuff’? (Write your thinking here.)

+ How can you reassure people that long-term use will be convenient & supported (ie offer long-term warranties, repair services, spare parts or product upgrades to extend product longevity)?

+ How can you ensure there is an easy way to pass products on when people are no longer using them?

STUFF CONNECTING TO NATURE > BRAINSTORM

How can your startup or company design ‘Stuff Connecting to Nature’? (Write your thinking here.)

+ How can you encourage people to be in nature... or to bring the outside in?

+ How can you be more thoughtful about using rare and/or virgin resources?

+ How can you focus on new or overlooked natural solutions that perform better than synthetic or “artificial”?

STUFF CONNECTING TO NATURE > BRAINSTORM

How can your startup or company design 'Stuff Connecting to Nature'? (Write your thinking here.)

+ How can you create a connection to nature through materials used in end-user products & share stories that inspire others to follow?

+ How can your business model and supply chains demonstrate a move to regeneration of nature and people (vs destruction & exploitation)?

JOYFUL STUFF > BRAINSTORM

How can your startup or company design 'Joyful Stuff'? (Write your thinking here)

+ How can you create ways to experience the new and exciting without users feeling guilty about 'mindless consumption'?

+ How can you design products that elevate an activity by boosting users' mood?

JOYFUL STUFF > BRAINSTORM

How can your startup or company design 'Joyful Stuff'? (Write your thinking here)

+ How can you use all channels available to engage users through multiple senses? Goal is for true sensorial, omnichannel strategies.

+ How can you experiment with digital substitutes?

FLOWING STUFF > BRAINSTORM

How can your startup or company design 'Flowing Stuff'? (Write your thinking here.)

+ How can you make second-hand irresistible for buyers, highlighting uniqueness, quality, resale value etc.

+ How can you design new products using upcycled materials?

+ How can you design for on-demand production and customization and design out 'dead stock'?

FLOWING STUFF > BRAINSTORM

How can your startup or company design 'Flowing Stuff'? (Write your thinking here.)

+ How can community models of 'Flowing Stuff' be scaled/industrialized?

+ How can you identify new ways for the private and public sector to work together to mainstream the shift to circular business models for Flowing Stuff?

Appendix

Stuff in Flux 2: The 'Leading Edge' Methodology:

The qualitative phase of the approach led to the identification of four new Market Opportunities. Globally, the insight is based on 300 hours of interactions — from interviews, tasks and Hackfests — with 60 Leading Edge respondents from China, Germany, the USA, and Canada.

In Canada this phase was conducted in Vancouver, Toronto, Montreal (n=16).

Quantitative survey of 7,900 people across seven countries (Canada, US, Brazil, China, Germany, India, Russia).

Canada (n=1,125)

Fieldwork in Canada was conducted between October 2021 and January 2022.

The online survey validated and measured the changes observed among the Leading Edge and identifies relevance and traction of the four Market Opportunities among larger parts of the population (mass market).

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If you would like more support in applying the Stuff in Flux 2 insights to your circular innovation goals, please reach out to lindsey@circularcitizens.com or rosemarysrri@gmail.com

