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Flexible Packaging
Association

2023 REPORT TO THE MEMBERS

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From left to right: **Evan Arnold**, Glenroy, Inc.; **Alison Keane**, Flexible Packaging Association; and **Katie Juehring**, Glenroy, Inc.



From left to right: **William (Bill) Jackson**, Amcor Flexibles; **Alexa Juehring**, Glenroy, Inc.; **Isabella Juehring**, Glenroy, Inc.; and **Kathy Bolhaus**, Charter Next Generation

Letter from the President and CEO

Advocacy remained the highest priority in 2023 at both the federal and state levels. The aluminum foil trade case proceeded throughout the year to a final and regrettable conclusion in November 2023. In a complete dereliction of duty, the Department of Commerce (DOC) blatantly dismissed the impact of additional duties on aluminum foil from South Korea and Thailand on the flexible packaging industry in the U.S. Instead, the DOC took the easy way out and did not adopt the thoughtful solution of a use exemption for thin gauge converting foil that is not manufactured in the U.S., in favor of wrongly grouping all aluminum foil into one category, so that they could simply assign duties across the board. Work on the state level produced more favorable results with no new bans or extended producer responsibility bills passed for packaging; two PFAS-free compliance dates extended; and several advanced recycling bills adopted. At the October 2023 Board meeting, FPA approved its first ever political action committee, FlexPAC™.

Significant progress was made on two other pillars of FPA's mission – membership and meetings. Through two Board-level workgroups, FPA introduced a new membership category and reimaged our fall conference for 2024. The new membership category, Supporting Member, is open “to any firm or corporation, or division thereof, engaged in the distribution of materials, equipment, supplies, or flexible packaging, and businesses providing services, within the U.S. and having sales in the U.S. of materials, equipment, supplies or flexible packaging, or services to the flexible packaging industry.” While this membership category is not eligible for seat on the FPA Board of Directors, they do get the value of FPA's networking, data, and promotion work. The dues are tiered, with a separate flat rate for the banking sector.

On the meetings front, FPA's new FlexForward® fall conference will be held in Charlotte, NC in 2024 with a new agenda and format. This will include a new networking event as well as another half-day of content. The content will continue to include policy, but will also be geared towards technical innovations with a theme of “Sustainability.” There will also be new sponsorship opportunities and tabletop exhibitors. FPA is excited to open this meeting up to the entire supply chain and continue the conversation on the sustainability benefits of flexible packaging and solutions to its full circularity. Work was also begun in 2023 on our 2025 Annual Meeting and our 75th Anniversary celebration.

Industry growth, as well as FPA growth, continued this year, with flexible packaging increasing to a 21% share of the U.S. packaging sector; 2023 being a year where FPA data is confirmed with the 5-year census data cycle. The industry is poised to grow from \$42.9B in 2022 to \$44.7B in 2023. So as we close the books on 2023 and prepare for 2024, FPA is proud of our accomplishments on behalf of the industry and knows there is more work to be done for this growing and dynamic industry.

Sincerely,



Alison Keane, Esq., CAE, IOM
President & CEO



Advocacy – State

2023 was yet another landmark year for packaging policy at the state level. While FPA was heavily engaged in several issue areas including labeling standards, per- and polyfluoroalkyl substances (PFAS), and protecting advanced recycling technologies, our highest priority remained extended producer responsibility (EPR) legislation. In 2021, Maine and Oregon became the first two states to pass EPR laws for packaging sold or distributed in their states, followed by California and Colorado in 2022. This year we saw a record number, 43, packaging EPR bills across 16 states but remarkably no new state packaging EPR program passed.

However, both Maryland and Illinois were successful in passing legislation that should help pave the way for future EPR bills in those states. The EPR proposals introduced in Illinois (IL SB 1555) and Maryland (MD SB 222) were heavily amended, changing them from EPR programs to needs assessments and calling for comprehensive evaluation of the respective state's current and future recycling capabilities and needs.

This year we also saw EPR packaging legislation in Hawaii, New York, and Washington gain traction. Hawaii's HB 1326, while deeply flawed, took a somewhat novel approach to setting reduce, reuse, and recycling targets. The legislation set a goal of 70% reduction in the amount of packaging waste that is either landfilled or incinerated in the State by 2030. In New York, packaging EPR has been a major focal point of the assembly and the Governor's Office (Administration) for the last several years and there is a growing desire to get something passed. While there were five different bills put forward, it was SB 4246 (Harckham) that became the favored vehicle to move EPR in the final days of the session, but fortunately did not have the legs to make it across the finish line. Similarly, packaging

EPR continues to be a major legislative priority in the state of Washington. Washington was largely considered the most likely state to pass EPR in 2023 and started off with significant momentum but the 140+ page measure, which also contained a bottle Deposit Return System (DRS), ultimately stalled as negotiations broke down and failed to advance. New York and Washington remain two high-priority states for FPA, and we are already working with bill sponsors in those states for 2024.

FPA is also heavily engaged with a large coalition of stakeholders across multiple industries and is continuing to work with bill sponsors to make improvements and create palatable legislative EPR language.

Other bills not directly tied to EPR that FPA focused on included advanced recycling technologies, PCR content laws, labeling bills, and toxic chemical bans, specifically targeting perfluorinated substances (PFAS) in packaging. FPA was successful in defeating or improving legislation in several states, at least delaying infeasible reporting requirements or bans on the use of PFAS in flexible plastic packaging. Nevada's SB 76 was uniquely problematic. The bill was amended to include a negative labeling requirement for intentionally added PFAS in certain products and packaging. In short, covered packaging and products that DO NOT contain intentionally added PFAS would be required to include "No Perfluoroalkyl or Polyfluoroalkyl Substances were Intentionally Added or Used to Make This Product," in both English and Spanish, on the product's label. This negative labeling requirement would have been the first of its kind and would undoubtedly have resulted in tremendous confusion for consumers. SB 76 successfully moved through both chambers but was vetoed by the Governor. In another 11th-hour legislative win, we were able to push back the ban on PFAS in food packaging in Rhode Island until

July 31, 2024, as part of a friendly amendment to SB 724. Rhode Island had previously passed legislation that would ban PFAS in food packaging by January 1, 2024. Minnesota enacted a new ban but does not impact processing aids as it pertains to products and intentionally added PFAS.

We have also seen an increase in the number of labeling bills introduced at the state level. These “Truth in Labeling” bills are modeled after California’s SB 343 (2021) which targets certain statements and the use of the “chasing arrows symbol” or versions of it. This year, we were successful in defeating bad labeling legislation in CT, IL, MD, NV, NY, and OR, and are continuing to monitor MA and NJ, who are full-time legislatures.

Lastly, as FPA firmly believes a suite of solutions is necessary to address the lack of collection, processing, and end-markets for flexible packaging circularity, FPA advocated in several states for legislation

enabling and funding advanced recycling, including chemical recycling. We were successful in several states, and 24 states now have laws on the books protecting advanced recycling technologies, and this work will continue.



FPA Washington, DC Fly-in 2023 at the Supreme Court of the United States

Advocacy – Federal

In December 2022, the U.S. Federal Trade Commission (FTC) announced a public comment period for “Guides for the Use of Environmental Marketing Claims” (Green Guides). The FTC sought comments concerning the efficiency, costs, benefits, and regulatory implications of the Green Guides to evaluate whether to retain, modify, or rescind them.

Among other things, the Green Guides establish definitions for terms like “recyclable” and “recycled content.” FPA submitted comments independently through the EHS, Circularity, and Product Stewardship Committees. We have been heavily engaged with the U.S. Chamber of Commerce (USCC) and a coalition of industry stakeholders developing language and

recommendations to the FTC on this issue. FPA is also pleased to announce that we are a founding member of the National Association of Manufacturers’ (NAM) new Manufacturers for Sensible Regulations (MFSR) committee which focuses on advocating at the Federal level on behalf of broad cross-industry manufacturing issues.

FPA continued its aggressive advocacy against additional aluminum foil duties stemming from a July 18, 2022, self-initiated aluminum foil circumvention case against Thailand and South Korea by the Department of Commerce (DOC) in 2023. In 2017, the U.S. government imposed duties on aluminum products coming from China, including aluminum foil. The new investigation claims South Korea and



FPA Washington, DC Fly-in 2023 on Capitol Hill

Thailand are circumventing the duties in China. FPA vehemently opposed these new duties and embarked on a sixteen-month campaign, both legal and political, to stop the imposition and/or find a mitigating bright line to allow imports of converter foil from these countries to continue, as the converter foil that is used in the flexible packaging industry cannot be sourced from U.S. manufacturers. This was the case five years ago in the Chinese action and nothing has changed. A decision on the case was originally slated for December 15, 2022, but was delayed twice, in part due to FPA's efforts. FPA submitted its first brief to DOC on September 16, 2022, its second on February 24, 2023, and its third one (post-prelim brief) on May 1, 2023. FPA met with dozens of House and Senate offices, both in-person and virtually, and received numerous letters of support and inquiries with the DOC on the case. FPA also met with DOC in February 2023.

Ultimately, while the preliminary decision of circumvention was made on March 15th for both countries, there was a concession made to allow converter foil to continue to be imported from Thailand and South Korea if the metal sheet is not coming from China. This is very nuanced, but we believe that while the primary metal may still be coming from China, which is necessary as 60% of the world's primary aluminum comes from China, if the sheet from that metal is made elsewhere before being further processed into foil, importers will avoid the duties. Currently, at least South Korea has this capability. The final determination, at first slated for August 15th, then moved to October 3rd, finally came down on November 17th. While FPA used the extra time to fight for relief under the final determination, carefully crafting what we believed were winning arguments on two specific points, no duties on South Korea and a certified use exemption for the converting foil gauges necessary for the packaging industry, ultimately FPA's efforts were unsuccessful with the final decision mirroring the preliminary decision and DOC blatantly

ignoring not only the impact to the domestic flexible packaging industry but also their readily available remedies for such.

Also on the foil front, FPA submitted comments on the Section 232 exclusionary process. In 2018, administrative action was taken under Section 232 of the Trade Expansion Act, and worldwide tariffs were imposed on aluminum products, including foil. Unlike the China and circumvention duties previously discussed, however, Section 232 allows for an application process for exclusion from these tariffs for foil that is not made in the quantity or quality domestically necessary for U.S. manufacturing. FPA members have received approximately 5,400 successful exclusions under this process, but the process is arduous and must be repeated annually regardless of whether circumstances have changed. In a proposed rule, DOC is looking to streamline the process and add additional criteria for requests and objections. FPA submitted comments by the comment deadline of October 13th and supported some of the proposals, while opposing others.

Environmental, Health, and Safety (EHS) Committee

As the voice of the flexible packaging industry, FPA works with regulators at the U.S. Environmental Protection Agency (EPA), the U.S. Occupational Safety and Health Administration (OSHA), and other U.S. regulatory agencies such as the Federal Trade Commission (FTC) and Food and Drug Administration (FDA) to share industry positions and mitigate potential regulatory burdens on flexible packaging manufacturing in the United States.

FPA's Environmental, Health, and Safety (EHS) Committee also tracks regulatory developments across these Agencies to inform FPA's members on upcoming and existing environmental compliance issues and policies.

Highlights of the EHS Committee's work in 2023 not only centered on facility regulatory activity but national strategy as well, include:

Submission of FPA Comments to the EPA on the National Plastics Strategy

The EPA's National Plastics Strategy follows last year's National Recycling Strategy. Despite lauding the value of flexible plastics, particularly flexible plastics, in protecting the nation's foods and medicines, the EPA draft calls for the reduction of plastics from the supply chain, and it fails to examine the systematic overhaul of community recycling and infusion of capital under the Inflation Reduction Act (i.e., "the Climate Act") and billions of dollars of other environmental and infrastructure funding. FPA's comments upbraided the agency for its myopic focus, corrected its interpretation of the Oceans Act as a basis for the report, offered advice and assistance, and discussed suggestions for finalizing the draft.

Submission of FPA Comments on the Securities and Exchange Commission's Environmental, Social, and Governance Regulations/Guidance

The financial community is bracing for the imminent release of the SEC's ESG regulations, which will affect public companies that are regulated directly by the SEC and private entities, like many of the FPA's members, who are suppliers, as well as banking and loan services. The proposed regulation, issued in late 2021, was concerning in its breadth, complexity, and failure to clearly articulate its goals. The Committee's comments focused on climate emissions reporting, defined by Scope 1 (emissions from manufacturing); Scope 2 (emissions associated with energy usage); and Scope 3 emissions (climate emissions in the supply chain associated with product life cycles), and the respective cost and information burdens for obtaining such information-or providing it to our customers.

Federal Trade Commission Green Guides

Generally, the Green Guides are based on correcting the misperceptions of advertising claims, such as green marketing claims. The Commission announced its revisions to the Green Guides late last year, and the FPA submitted comments and suggestions in 2023. These updated Green Guides are expected to be released by the end of 2024 and should set the precedence for a harmonized federal approach instead of the current state-by-state unworkable approach that appears to be emerging for the labeling of recyclability.

Per-and polyfluoroalkyl ("PFAS")

There is significant movement at state and federal levels to ban/regulate the use and reporting of PFAS as discussed previously. PFAS are being examined at the federal level under the Safe Drinking Water Act, Clean Water Act, Comprehensive Environmental Response, Compensation, and Liability Act, the Toxic Substances Control Act, the Toxics Release Inventory, the Superfund Law, and now the Clean Air Act. The EHS committee is monitoring U.S. regulatory activities closely, in concert with FPA's overarching active involvement in state PFAS legislation.

HAPS Reporting

The EPA proposed a rule that would require owners and operators that emit hazardous air pollutants (HAPs) above health-based risk levels (i.e., much lower than the Clean Air Act's definition of major source as 10 tons per year (TPY) of any one HAP or 25 TPY of a mixture of HAPs, pursuant to which many of FPA's members are regulated by two sets of National Emission Standards for Hazardous Air Pollutants (NESHAP, also colloquially called "MACT standards"), which FPA negotiated with EPA between 2008 and 2012. These reporting requirements could have significant potential impacts on FPA's members, and the EHS Committee submitted comments opposing the rulemaking in November 2023.

HAPS MM2A (“Major MACT to Area Source”) Reconsideration

The EPA is proposing to add requirements for sources that are “reclassified” from “major HAP sources” to “area HAP sources” under the NESHAP program. Several FPA members took advantage of a January 25, 2018, Policy, later codified by EPA in 2020, by substituting water-based coatings and inks and press cleaners for methylene chloride, acetone, and other solvents. Environmental groups sued the EPA on the regulation, arguing that the MM2A rule would allow sources to increase their emissions of HAP up to the de minimis level (*Communities Against Air Toxics v. EPA, D.C. Cir (in abeyance pending reconsideration)*). The EHS Committee prepared and submitted comments, due at the end of October, arguing that it is not only bad public policy, but fails to recognize material substitution at all, which the EPA has touted in numerous other regulatory initiatives.

OSHA’s Voluntary Protection Program

OSHA solicited public comment on modernizing its Voluntary Protection Program (VPP). To qualify for VPP, employers must meet OSHA’s safety and health management criteria, which focuses on comprehensive management programs and active employee involvement to prevent or control worksite safety and health hazards. The EHS committee drafted comments and submitted such by the April 14, 2023, deadline. Two other proposed rules were also addressed in 2023, the OSHA walkaround rule and heat and illness rulemaking.

Environmental Justice Policies

The Biden Administration has been active in introducing and expanding Environmental Justice (EJ) policies. President Biden prioritized EJ policy by issuing two Executive Orders (EOs) on his Inauguration Day. On February 12, 2023, the President also issued a new EO to all federal agencies on “Further Advancing Racial Equity and Support for Underserved Communities Through the Federal Government.”

In January 2023, the EPA released a significant addendum to its May 2022 Environmental Justice “Legal Tools Directive.” Titled “EPA Legal Tools to Advance Environmental Justice: Cumulative Impacts Addendum,” this addition details EPA’s legal authority to find and fix cumulative impacts in EJ communities using permitting, standard setting, waste cleanups, and oversight of state programs. The regional offices will oversee determining if there is “evidence that seems to suggest that these permitting decisions can have disparate or disproportionate adverse impacts on certain communities.

EPA’s EJScreen tool, a critical online EJ mapping application that is searchable by zip code, by location, or by a facility’s name or address, has been updated to include additional compliance data from Environment Compliance History Online (ECHO) and the Air Toxics Screening Assessment. EPA is also set to roll out an advanced screening tool for cumulative CAA exposures in 2023.

Waters of the United States (WOTUS)

The Army Corps of Engineers and EPA finalized the WOTUS rule on January 18, 2023, and the rule became effective on March 20, 2023. This rule reinstates the Obama-era WOTUS rule, restoring protections for ephemeral bodies of water that have a hydrogeologic nexus to navigable waters. The rule has been challenged through several separate lawsuits. The Biden administration plans to further revise and refine the WOTUS definition in a second rule that they plan to propose and finalize by July 2024.

FPA's Sterilization Packaging Manufacturers Council (SPMC) is comprised of FPA member companies that are industry experts in the unique production requirements of sterile medical and pharmaceutical packaging. SPMC's members volunteer their time, resources, and technical expertise to provide packaging requirement guidance, test methodology clarity, standards development, and user education.



SPMC released a new whitepaper in 2023 titled "Rollstock Storage and Handling." The paper provides recommended storage guidelines to help maintain the quality and integrity of rollstock packaging materials. The paper was published in September and adds to the growing list of publications including "A Guide to Writing Rollstock Specifications;" "A Guide to Writing Pouch Specifications;" "Package Integrity Testing;"

The SPMC celebrated its third annual Sterile Packaging Day on February 8, 2023. The Council created the event to raise awareness of the critical role sterile packaging plays in everyone's health and well-being. The celebration theme was "Designed to Protect." This was chosen to salute the medical device manufacturers and packaging engineers who design and validate sterile barrier systems.

Celebration of Sterile Packaging Day included shareable graphics and campaigns through LinkedIn, a LinkedIn Live stream, and an in-person presence at Medical Design & Manufacturing (MD&M) West in Anaheim, California, complete with a blood drive with the Red Cross. SPMC plans to continue the tradition of celebrating Sterile Packaging Day at MD&M West on February 7, 2024.



and “Polymeric Gels in Flexible Medical Device Packaging.” The online FAQs were also updated in 2023. The next white paper that the SPMC is working on is “Preformed SBS Storage and Handling,” slated for release in early 2024.

SPMC’s Sustainability and Regulatory Committee is finalizing a position paper on the potential risks of proposed recyclability and recycled content mandates on sterile medical packaging. The committee hopes the paper will help inform lawmakers and stakeholders on how these mandates would clash with Food and Drug Administration (FDA) regulatory and biocompatibility requirements for sterile packaging, the sterilization process itself, and the product protection and stability of medical packaging.



SPMC member companies are also supporting volunteer-based KiiP on their Wicked Stability Project, which aims to streamline packaging stability testing so that time, resources, and engineering talent can be applied to other areas of medical packaging innovation. The Wicked Stability Project is examining available data sources and compiling aging study results on common sterile packaging materials. By leveraging the aging studies conducted by SPMC member companies, the SPMC Technical Committee can support and advance this effort.

Four new member companies joined SPMC in 2023: Berry Global, Charter Next Generation, Winpak, and Vonco Products, LLC.



The Emerging Leadership Council's (ELC) mission is to establish a network of leaders to drive issues and opportunities that have a long-term impact on the advancement of the U.S. flexible packaging industry. The strategic goals of the committee include:

Education

Develop resources to empower FPA member companies to effectively educate families and communities about the benefits of flexible packaging.

Recruitment & Leadership Development

Recruit, retain, and develop a pipeline of future leaders for the flexible packaging industry.

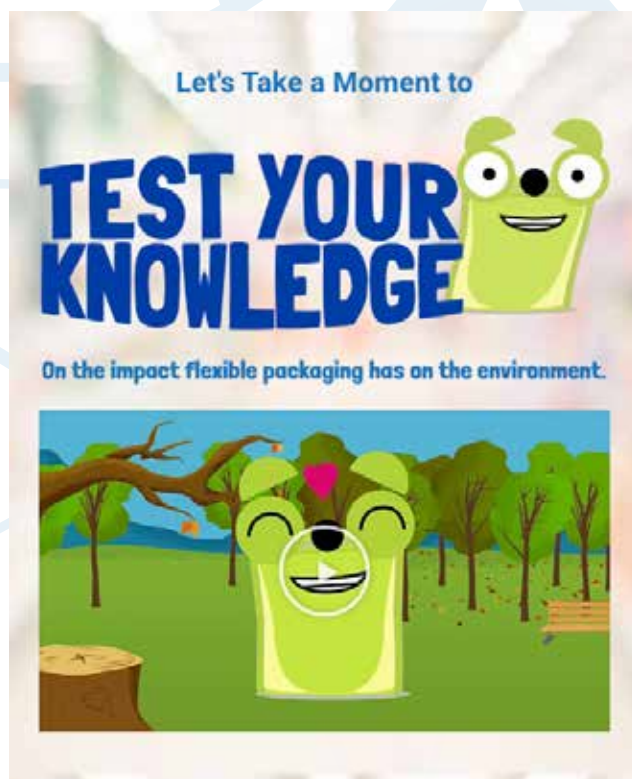
Advocacy in Sustainability

Provide a voice of advocacy for the flexible packaging industry by working with lawmakers and promoting responsible packaging that supports circular economy principles.

Diversity, Equity, and Inclusion (DE&I)

Help foster, promote, and engage in a culture of diversity and inclusion in the flexible packaging industry.

- Led the charge to better educate policymakers on FPA's position on EPR bills through a comprehensive video that will be released in 2024.
- In continuation of the "Let's Talk Flexible Packaging" campaign, the committee created a beta site for an interactive "Test Your Knowledge" page within PerfectPackaging.org where Mr. FlexPack tests visitors' knowledge of the impact the flexible packaging has on the environment. Activities include a myth busting fact or fiction, a key sustainability terms quiz, and an interactive drag and drop "what to recycle and how." The Test Your Knowledge campaign is set to fully launch in March 2024.



Education



The ELC Education Committee strives to combat the negative stigma that surrounds the plastics industry by building a strong foundation of educational materials that highlight the importance, benefits, and the need for flexible packaging. In 2023, the committee made significant strides in creating a video explaining extended producer responsibility (EPR) and continuing the development of content within the "Let's Talk Flexible Packaging" campaign.

Recruitment & Leadership Development

Speaker Series

The ELC hosted a free webinar speaker series focused on leadership development. The speakers for 2023 featured Loran Nordgren, Organizational Psychologist, Kellogg School of Management (July 2023), Tom Wetsch, Chief Innovation Officer, Pregis (May 2023), and William (Bill) Jackson, Ph.D., Chief Technology Officer, Amcor Flexibles (February 2023).

Virtual Summer Internship Program

Returning in 2023, the ELC hosted the Virtual Summer Internship Program. The program fosters a sense of community and creates networking opportunities for summer interns who are considering full-time careers in the flexible packaging industry. The program welcomed more than 35 students from FPA member companies. For the duration of the summer, the interns participated in weekly engagements that consisted of either a small group session or a broad group session.

The small group sessions were conducted by a member of the ELC and a small group of interns to network and discuss a series of topics. The broader group sessions mainly consisted of special guest speakers. A special thanks to our speakers for 2023.

- **Kick-off and Introduction to the FPA:** Alison Keane, FPA President & CEO and Jonathan Quinn, Vice President of Marketing and Sustainability, Accredo Packaging Inc.
- **Summer Internship Career Panel:**
 - Patrick Clark, Vice President, R&D and Procurement, Bryce Corporation
 - Weston Harcourt, Strategic Account Manager, Sonoco Flexible Packaging

▫ Allison Holzshu, Vice President, Product Line Management, Berry Global

▫ Monica Scott, Strategic Account Manager – Flexible Packaging, H.B. Fuller

- **Special Session:** Book discussion on the human element with Dr. Loran Nordgren, Professor of Management and Organizations at the Kellogg School of Management and author of the bestseller book, *The Human Element*
- **Meet the CEO:** Kathy Bolhous, CEO, Charter Next Generation
- **How to Build Your Leadership Ecosystem/ Building Your Board of Directors:** Kasie Fairbairn, Vice President of Sales, Windmoeller & Hoelscher Corporation

2023 Pack Jam at Clemson University

In spring 2023, the ELC sponsored Clemson's Pack Jam and hosted a panel discussion to highlight career opportunities within the flexible packaging industry. The event draws students from all major packaging schools nationwide.



Advocacy

Advocacy in Sustainability

In 2023, the ELC Advocacy Committee continued building educational resources on the complexities within the flexible packaging industry. The launch of the “Did You Know Flexibles” LinkedIn series is comprised of 18 videos designed to appeal to a broad audience including non-industry, CPGs, etc., and focused on a variety of topics including:

- Why Flexible Packaging is Important
- The Environmental Impact of Flexible Packaging
- Ins and Outs of Flexible Packaging Recycling
- What is EPR?

All videos can be seen on the FPA’s (@flexible-packaging-association) and the ELC’s (@emerging-leadership-council) LinkedIn pages.



Advocacy on the Hill

In September 2023, FPA hosted its first-ever ELC D.C. advocacy fly-in. The fly-in included a core group of ELC members, FPA staff, and local lobbyists. Fly-ins offer a unique opportunity to make many connections and shift perceptions in a few days. The core intent is to provide legislators with a perspective on the flexible packaging industry from a younger perspective.

The goal of this fly-in was to establish relationships between FPA member companies and their congressional representatives so that they could serve as a resource for their offices when drafting or analyzing legislation that would impact our industry. Some of the issues discussed were a potential Federal labeling for recyclability bill, workforce and supply chain issues, advanced recycling, and overly burdensome legislation that picks winners and losers. The event was successful and has already helped open new dialogues with several congressional offices.

In addition to the fly-in, the ELC coordinated and hosted an Advocacy 101 with Capitoline Consulting for all ELC members.





The Voice of the Flexible Packaging Industry

Representing one of the fastest growing segments in packaging, the Flexible Packaging Association (FPA) is the leading voice for over 160 members that support flexible packaging including material suppliers and flexible packaging manufacturers in the U.S. FPA advocates for public policy at the national and state levels, on environmental and sustainability aspects of, and benefits of flexible packaging.

Flexible Packaging – Leading the Way in Packaging Innovation

Flexible packaging is at the forefront of important packaging attributes in product protection, design, and performance; consumer convenience; and sustainability, all of which positively impact the environment, consumers, and businesses.

Flexible packaging is any package or part of a package whose shape can readily be formed to the product packaged. It includes packaging made with paper, plastic, film, foil, metallized or coated paper and film, or any combination of these materials.

Flexible packaging delivers food, beverages, health and beauty items, and medical products to consumers, enhancing their safety and well-being. This packaging type increases the shelflife of products helping to prevent food borne illnesses; enhances consumers' welfare by providing convenient resealability, cook and serve, and portion control packaging; and is responsible for protecting millions of patients every day with sterile medical packaging. Many of the safety and convenience benefits of flexible packaging also contribute directly to reducing waste.

Flexible packaging also reduces energy, water, and greenhouse gas emissions from packaging during manufacturing and transport. The process of forming glass, rigid plastic, and aluminum requires large amounts of heat, which drives high fossil fuel consumption, water uses and, in turn, far greater greenhouse gas emissions. These reductions continue during transport as flexible packaging is much lighter, and often ships flat or in rolls instead of fully formed and empty unlike bottles or cans which means 15-25 fewer trucks shipping the same amount of packaging! Even though some materials like glass and steel are recycled at higher rates than flexible packaging, they are so bulky that they are still responsible for sending more package material to landfills than flexibles.

Employs
85,000
workers coast-to-coast

2nd largest
21% of the packaging
market share

\$42.9
billion
in annual U.S. sales

Questions or want to learn more?

Contact Alison Keane, President and CEO, Flexible Packaging Association
akeane@flexpack.org | 410.694.0800 | FlexPack.org

Diversity, Equity, & Inclusion (DE&I)

FPA and its member companies believe that DE&I is necessary to overcome industry challenges and innovate better for everyone. In 2023, the ELC DE&I committee worked to identify a network of DE&I leaders within FPA member companies. The committee successfully hosted two round table discussions with approximately ten stakeholders, as well as a virtual session with DE&I expert Kuma Roberts, Chief Diversity, Equity, and Inclusion Officer, Arrowhead Consulting.

In 2024, the DE&I committee will seek approval to continue creating content around the business case for DE&I and plans to explore partnership opportunities with other subcommittees, specifically recruitment and leadership development.



FPA continuously works to promote the positive story of innovation and the advantages of flexible packaging. FPA applies a full range of traditional and digital tools to connect with members, media, consumers, policymakers, and other audiences.

Pet Food Sector LCA Assessment and Packaging Comparison

FPA partnered with PTIS, LLC to perform a streamlined LCA to compare flexible packaging options for the pet food sector to that of other comparative packaging formats to better understand the environmental impacts. The comparison categories include pet food, pet treats, dental treats, and cat flea collars.

PTIS developed a report of the key sustainability points of the results for the streamlined LCA and package comparisons. FPA will also be developing fact sheets and social media content/graphics to be posted to the FPA website.

Transitioning Flexible Films in Packaging Operations

FPA partnered with PMMI/PMG Custom Research to investigate the key operational challenges experienced by CPGs when transitioning between different flexible materials and develop best practices to address these challenges.



The main objectives of the project were to uncover key operational challenges and barriers to switching between flexible materials in CPG production lines and create a best practices document as an industry guide for CPGs, OEMs, and materials suppliers/converters on the most effective way to transition between flexible materials.

The project's key findings were presented at the 2023 Annual Meeting and the final report and best practices guide were sent to the membership in July.

FPA Webinars

FPA held three webinars throughout 2023. The first on July 17th when FPA partnered with The Recycling Partnership (TRP) for a webinar on the opportunities to increase film recycling. In partnership with AMERIPEN, FPA held two webinars including "A Conversation with Circular Action Alliance" in August 2023 and "A Conversation with Closed Loop Partners" in September 2023.

Online Conversations Overview

The bi-annual report, prepared for FPA by The Cyphers Agency, provides information on online news conversations and social media relating to flexible packaging. The volume of coverage during July-December 2023 saw a slight increase from the January-June period, from 218 total articles to 220 with most of the coverage focused on FPA News (66%) and Packaging Innovation (13%).

Member Cybersecurity: NAM Cyber Cover

FPA is partnering with the National Association of Manufacturers (NAM) to bring an innovative and comprehensive solution to help manage, mitigate, respond to, and recover from cyberattacks. Through the partnership with NAM, FPA is offering a cyber insurance and risk management product designed specifically for manufacturers and their needs.

Ongoing Membership Communications

FPA Flexible Packaging Industry News Bulletin

The bulletin is disseminated to FPA members weekly (every Monday) via email. FPA is sending the INB out through a third-party email service that allows FPA to track the number of “opens” by members. Other information can be tracked as requested.

FPA NOW (News on the Web)

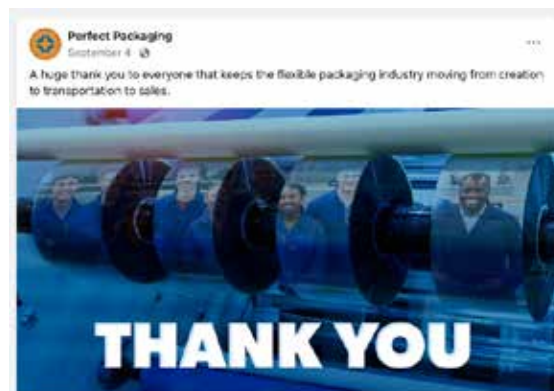
FPA NOW is a monthly bulletin that highlights FPA activities and contains industry trade press articles on trends in packaging and sustainability.

Social Media Program

Consumer-facing channels, Facebook and Instagram, maintained a healthy audience to promote Perfect Packaging, totaling 35,552 followers. Instagram has seen a steady uptick in followers (14%) skewing toward a female audience ages 25-44. Engagement continues to be generally neutral with most seeking more information.

LinkedIn and Twitter continue to organically gain a strong audience, seeing an 18% increase in followers. Most engaged content continues to focus on industry-related news, trends, and FPA updates/announcements. The best-performing content includes member achievements and technical innovations, industry news, and content that focuses on individuals in the industry.

In 2023, FPA's Emerging Leadership Council (ELC) launched a social media campaign with the help of our social media partner, The Cyphers Agency, to educate industry members and consumers about the flexible packaging industry. Topics included plastic film recycling, extended producer responsibility (EPR), and an inside look into industry efforts to achieve a circular economy. In addition to working with the ELC, FPA partnered with a handful of social media creators to further share information on making plastic film recycling second nature at home.



Influencer Outreach Program

In 2023, FPA pivoted its strategy to localize its messaging to the recycling capabilities of plastic film and educate consumers on what can be recycled and how to recycle the material. Through nine (9) influencers, including Kristie Gilmore, India Tate, Tamara Bowman, Heather Castillo, Tiffany Anne Westgor, Ashley Renne Nsonwu, Lexie Undem, Chelsee Hood, and Kristen Sellentin, outreach in 2023 reached 683,600 followers with 86,720 total engagements through Instagram, Facebook, TikTok, and Pinterest.

In 2024, FPA will continue its “What is Recyclable” messaging, as well as how flexible packaging helps to reduce food waste.



Did You Know Flexibles? Campaign

In 2023, FPA in partnership with the Emerging Leadership Council (ELC), developed and shared informative videos tackling store drop-off recycling, how to read How2Recycle® labels, what happens to recycled material, and the various benefits of flexible packaging including medical safety, the economy, and sustainability.

To date, the campaign has reached 95,909 with 8,207 engagements through LinkedIn, X (formerly Twitter), Facebook, and Instagram.



FlexPack VOICE®

FPA continues its partnership with the YGS Group for the development and distribution of its official magazine, *FlexPack VOICE*®. The magazine includes FPA news specific to the Association; industry news that focuses on the industry, including the supply chain, at large; as well as showcasing member achievements in sustainable flexible packaging and technical innovations that address product protection, e-commerce, food waste, food waste, medical safety, and more.



Five feature sections anchor the issues: “Advocacy Corner,” describes FPA’s advocacy efforts and what it is doing to be heard at the Federal and state levels to forward the interests of members; “FlexAppeal[®],” which highlights the benefits of flexible packaging; “FlexForward[®],” which focuses on industry breakthroughs and trends; “FlexFocus[®],” which features FPA members’ specific achievements in flexible packaging. In 2024, we will be bringing back the feature that highlights the important charitable work that FPA members do in their communities while offering space to note new hires in senior-level positions.

FPA/YGS Group is working with both our marketing firms (G&S Business Solutions and The Cyphers Agency) to increase the magazine’s social media presence and expand the distribution list. In 2023, *FlexPack VOICE*[®] earned a total of 31,907+ views.

FPA Sponsored Content Campaign in *Roll Call* for the Aluminum Foil Trade Actions

FPA ran two sponsored campaigns in *Roll Call* on the aluminum foil trade actions, including a sponsored op-ed, digital ads, and social media posts. The first campaign in February 2023, *More Aluminum Import Taxes, Less U.S. Economic Growth*, garnered more than 500,000 impressions and users averaged 8 minutes, 40 seconds on the sponsored op-ed page which is significantly higher than the industry average of <1-3 minutes.

The second campaign, *Unnecessary Aluminum Import Taxes Threaten U.S. Manufacturing*, wrapped up in September 2023 and included seven social media posts on X (formerly Twitter) and Facebook and display ads. The op-ed generated 1,000,019 impressions, while the social posts and ads garnered 10,804 impressions.



SPONSORED CONTENT

Unnecessary Aluminum Import Taxes Threaten U.S. Manufacturing

New federal actions on aluminum foil will put even more strain on U.S. manufacturing and Americans' wallets.

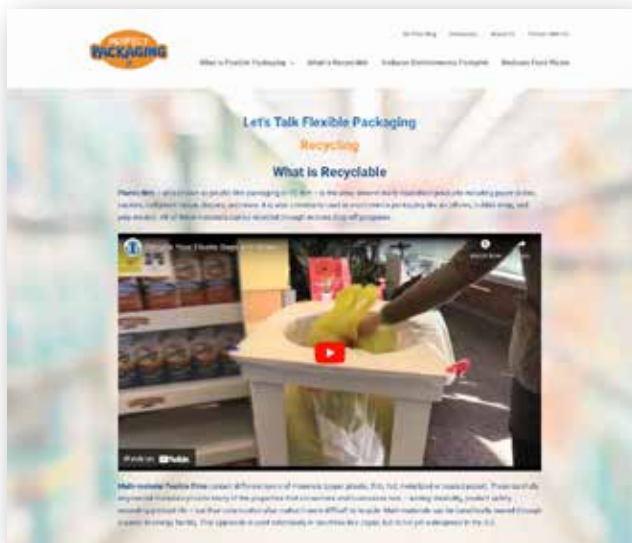


© Manufacturing Association published by the Flexible Packaging Association
March 2023

In March 2023, the Department of Commerce (DOC) made an unfortunately preliminary decision to impose new import duties on South Korean and Thai aluminum foil products after wrongly concluding that their producers were circumventing anti-dumping and countervailing duty orders on aluminum foil from the People's Republic of China. If finalized in its current state, this self-inflicted and short-sighted decision will inflict tens of millions of dollars in costs on American packaging producers, as well as the loss of American manufacturing jobs to overseas competitors and raise prices for thousands of everyday household products. The DOC should not be in the business of collecting pain on United States manufacturing producers, and it is not in our nation's interest to properly protect both American manufacturing and families.

FPA Website

The website, [FlexPack.org](https://flexpack.org), continues to provide members and guests with primary access to information on the Association and the flexible packaging industry. Over the past year, the site had 185K page views. The top visited pages on the website include the “Membership Directory” page (25,000+ views), FPA events calendar (10,500+ views), FPA Press Room (9,400+ views), FPA’s 2023 FlexForward® Fall Conference event page (5,300+ views), the industry overview (5,234+ views), the Buyer’s Guide (4,560 views), facts and figures (3,200+ views), and the “State of the U.S. Flexible Packaging Industry Report” (2,450+ views).



FPA Consumer Website

[PerfectPackaging.org](https://perfectpackaging.org), FPA’s consumer-facing microsite, promotes the industry to the consumer and addresses the miscommunication about flexible packaging and plastics that is often reported. The website continues to gain momentum and consumer interest with most seeking information on recycling options, the impact flexible packaging has on the environment, and the overall reasons to consider flexible packaging. New this year, the microsite was expanded to include more robust consumer

resources, to understand what and how different types of flexible packaging, specifically plastic film packaging, are recyclable, as well as educational resources showing how flexible packaging preserves food longer and ultimately reduces food waste.

Within the past year, the site earned 159K+ page views (a 381% increase from 2022), with the Environmental Impact of Plastic vs. Paper blog (49,220 views) and What is Flexible Packaging page (41,300+ views) continuing to be the top-visited pages.



FPA Magazine Website

FPA and the YGS Group developed a dedicated website for *FlexPack VOICE*®, FPA's magazine, [FlexPackVoice.com](https://flexpackvoice.com). It includes digital copies of the magazine; additional original articles; breaking news (a curated news feed from the e-newsletters); follow-up and expanded coverage of select articles from the print publication; video and/or audio; additional photo galleries to complement the magazine content such as FlexAppeal®; key upcoming events; and a social media feed.

In 2023, the site earned 36K+ page views, with top-read articles including “ProAmpac CEO Intends to Double Sales Within Five Years” (341 views), “Educating on the Differences Between PFAs and PPAs” (330 views), and “Marijuana Laws Open Packaging Opportunities” (305 views).

FPA Careers Website

Flexible packaging is one of the fastest-growing segments of the packaging industry, with more than \$42 billion in annual U.S. sales. About 85,000 people are employed by the industry across America, and we need more talented, ambitious professionals for a wide range of disciplines. To help with this workforce development, FPA developed a career website, [FlexPackCareers.org](https://flexpackcareers.org), that outlines the various career opportunities in the flexible packaging industry and includes links to FPA member websites and career pages (if applicable).

FPA Trade Show/Conference Participation

FPA actively serves as a thought leader for the flexible packaging industry and represents the industry at various trade shows and conferences throughout the year.

FPA representatives presented at the following conferences:

- AMI's Stretch and Shrink Film, November 29, 2023
- Flexible Packaging Europe's Fall Meeting, November 18, 2023
- PRINTING United, October 20, 2023
- R2R USA Conference, October 3, 2023
- 5P Expo and Converting, September 26, 2023
- PACK EXPO Las Vegas, September 12, 2023
- Global Pouch Forum, June 6-8, 2023
- ABRE Congress on Packaging and Consumption, May 24, 2023
- interpack 2023, May 4-10, 2023
- AMERIPEN Webinar: Packaging EPR Has Arrived in the U.S. - Now What? April 19, 2023
- ASC Annual Convention and Expo, April 16-18, 2023
- Top to Top Summit, March 5-7, 2023
- Contract Packaging Association (CPA) Engage, February 21-23, 2023
- The Packaging Conference, February 13-15, 2023
- ePS CONNECT, January 23-26, 2023

FPA exhibited at the following trade shows:

- Digital Packaging Summit, November 13-15, 2023
- PRINTING United, October 18-20, 2023
- PACK EXPO Las Vegas, September 11-13, 2023
- NCSL Legislative Summit, August 14-16, 2023
- ePS CONNECT, January 23-26, 2023



Sustainable Materials Global Challenge

FPA partnered with global academia-industry partnering platform IN-PART for its latest Global Challenge campaign. The Challenge was also in partnership with industry experts Eastman, WestRock, Avery Dennison, and a well-known ecological cleaning product brand. The campaign aims to mobilize collaboration between academia and industry to accelerate novel research and assets in sustainable materials and recycling technologies working towards a circular economy.

The Global Challenge program aims to mobilize the academia-industry ecosystem to address a global health or sustainability challenge with a clear

demand from the industry for technical solutions. Following successful campaigns on water pollution, sustainable plastics, rare diseases, COVID-19, and cancer, the latest Global Challenge focuses on sustainable materials.

This is a great opportunity to start new conversations with academia if you are working on sustainable materials and recycling technologies. You can register your interest and/or create a free account on IN-PART's matchmaking platform, Connect, to ensure you get the latest submissions from academia as they come in.

Global Challenge Campaign

Partner with the next generation of sustainable materials research

Join IN-PART's free partnering network to view the submissions to the campaign from universities, research institutes, and startups worldwide







Flexible Packaging Achievement Awards Competition

FPA announced the winners of its 67th Annual Flexible Packaging Achievement Awards Competition, which features flexible packaging solutions that meet expectations and needs through advancements in materials, graphics, structure, new uses, extended shelf life, and sustainability. The 2023 awards announcement was held at FPA's Annual Meeting on March 29, 2023.

In 2023, FPA received 87 packages submitted to the competition, with a total of 230 entries (some packages were entered into multiple categories). 31 flexible packages were honored with 39 Flexible Packaging Achievement Awards in various categories.

Technical innovation and sustainability continued to be a focus of the competition. Shelf impact and the focus on the user experience for packaging are seen as increasing trends. The printing quality of the entries was also remarked on by the judges.

Special thanks are given to the 2023 competition judging panel: Gary Borges, associate professor, University of Wisconsin–Stout; Charles Marshall, principal, Priority Metrics Group; and Jeff Peterson, president, Peterson Media Group.

Highest Achievement Award

Rescue!® Outdoor Disposable Fly Trap

Gold Award – Packaging Excellence

Gold Award – Technical Innovation

Silver Award – Expanding the Use of Flexible Packaging

Manufacturer: Glenroy, Inc.

www.glenroy.com



Gold Achievement Awards

Cadbury Caramello Miniatures Stand-up Pouch, 8 oz.

Gold – Shelf Impact

Manufacturer: Printpack

www.printpack.com



Entour™ Produce Package/ Entour™ Bold and Shield Lamination

Gold – Packaging Excellence

Gold – Sustainability

Manufacturer: Berry Global

www.berryglobal.com



Gillette® Slate Resealable Razor Pouches

Gold – Shelf Impact

Manufacturer: TC Transcontinental Packaging

www.tctranscontinental.com/en-us/packaging



Golden West Food Group Meat District® Gobbler Frozen Patties

Gold – Printing

Manufacturer: American Packaging Corporation

www.americanpackaging.com



**Kirkland Signature®
Ultra Clean HE Laundry Detergent Pacs**

Gold – Sustainability

Manufacturers: Accredo Packaging Inc. & Presto Products Company Fresh-Lock® Closure BU

www.accredopackaging.com & www.Fresh-Lock.com



Nichols Farms® Jalapeño Lime Pistachios

Gold – Printing

Manufacturer: PPC Flex

www.ppcflex.com



**MegaFood® Women's Ensemble
Preconception Daily Multipack**

Gold – Expanding the Use of Flexible Packaging

Manufacturer: Nosco

www.nosco.com



Pulmuone Beef Japchae Korean Noodles

Gold – Shelf Impact

Manufacturer: PPC Flex

www.ppcflex.com



Scotts Miracle-Gro® Rescue™ Outdoor Plant Potion™

Gold – Expanding the Use of Flexible Packaging

Silver – Packaging Excellence

Manufacturer: ProAmpac

www.proampac.com



White Eclipse UV-Blocking Packaging

Gold – Packaging Excellence

Gold – Technical Innovation

Manufacturer: PAXXUS, Inc.

www.paxxus.com



Vualá® Sorpresa Bold, 65 g

Gold – Printing

Manufacturer: Printpack

www.printpack.com



Silver Achievement Awards

Apex Protein Snacks Meat Sticks

Silver – Printing

Manufacturer: Nosco

www.nosco.com

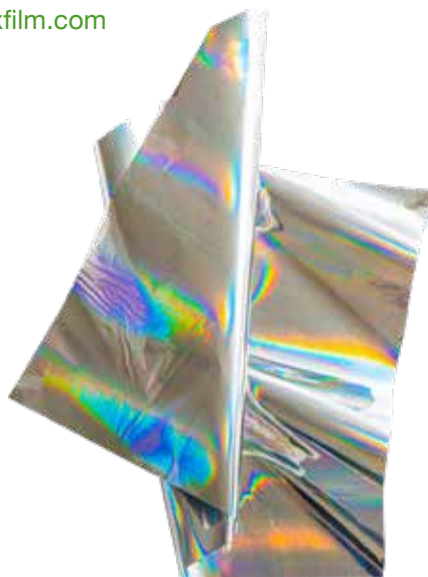


F-UHB-M Ultra High Barrier and High Metal Bond Metallized Polyester Film for Aluminum Foil Replacement

Silver – Technical Innovation

Manufacturer: Flex Films (USA) Inc.

www.flexfilm.com



EcoVue® Single Dose Ultrasound Gel Packet

Silver – Expanding the Use of Flexible Packaging

Manufacturer: Glenroy, Inc.

www.glenroy.com



Frito-Lay Compostable Snack Packaging at Coachella Music Festival

Silver – Printing

Manufacturer: Bryce Corporation

www.brycecorp.com



HP HDX Lubricant Oil Stand-up Spouted Pouch, 1 L

Silver – Expanding the Use of Flexible Packaging

Manufacturer: Paharpur 3P

www.paharpur3p.com



**Lahli™ Morning Protein Bites
in an AmPrima™ PE Plus Recycle Ready Pouch**

Silver – Packaging
Excellence

Manufacturer: Amcor
Flexibles

www.amcor.com



**Nestlé San Pellegrino Sparkling Water
Integritite™ 33% PCR
Bundling Collation Shrink Film**

Silver – Shelf Impact

Manufacturer: TC Transcontinental Packaging

www.tctranscontinental.com/en-us/packaging



**McDonald's 2022
Pokémon Card Overwrap**

Silver – Sustainability

Manufacturer: American
Packaging Corporation

www.americanpackaging.com



Okam Rice Recyclable Flat Bottom 3D Pouch, 5 kg

Silver – Packaging Excellence

Manufacturer: Integrated Plastics Packaging

www.ipp.ae



**Metropolitan Tea Compostable Tea Envelopes
and Overwraps**

Silver – Technical Innovation

Manufacturer: ProAmpac

www.proampac.com



**Paper Boat™ Coconut Water
Shaped Stand-up Pouch, 250 ml**

Silver – Shelf Impact

Manufacturer: Paharpur 3P

www.paharpur3p.com



Pet Medical Product Pouch

Silver – Shelf Impact

Manufacturer: Advanced Web Technologies – Illinois, Inc.

<https://awtlabelpack.com>**Supply™ Indica Vape Pen, 300 mg**

Silver – Expanding the Use of Flexible Packaging

Silver – Packaging Excellence

Manufacturer: PPC Flex

www.ppcflex.com**Walex Commando® Black Holding Tank Cleaner Store Drop-off Recyclable Pouch**

Silver – Sustainability

Manufacturer: Glenroy, Inc.

www.glenroy.com**Profol's SBB Synthetic Bacon Board®**

Silver – Technical Innovation

Manufacturer: Profol

www.profol.com**Purition Single-serve Smoothie Meal Replacement Powder**

Silver – Sustainability

Silver – Technical Innovation

Manufacturer: ProAmpac

www.proampac.com**Whole Foods Baking Mix Flat Bottom Pouches**

Silver – Printing

Manufacturer: TC Transcontinental Packaging

www.tctranscontinental.com/en-us/packaging

Ykibble® Baked Dog Food 5 Panel PTC Zipper Pouch, 9.5 kg

Silver – Shelf Impact

Manufacturer: Paharpur 3P

www.paharpur3p.com

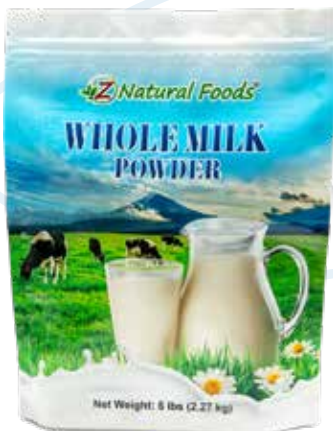


Z Natural Foods® Whole Milk Powder

Silver – Printing

Manufacturer: Inland Packaging

www.inlandpackaging.com



Flexible Packaging Student Design Challenge

The 2023 Student Flexible Packaging Design Challenge, managed and judged by the Emerging Leadership Council (ELC), received 62 concept outlines from some of the top packaging design programs across the United States. From the concept outlines submitted, 21 were selected to continue to the development phase. This year's winners were teams of students from the California Polytechnic State University and the University of Wisconsin – Stout.

First Place Honors

Sprout Ease

Students: Caroline Powell, Emily Kovarik, and Jason Li

School: California Polytechnic State University

Professor: Joongmin Shin, Ph.D., Associate Professor



Second Place Honors

Puppy Chow Kit

Student Team: Olivia Leipnitz, Elaina Marxen, Annabelle Meyer, and Ella Stelter

School: University of Wisconsin – Stout

Professor: Gary Borges, Associate Professor



Honorable Mention

Double Guacamole Flexible Pack

Student Team: Trenton Klabon, Ann Rackliffe, and Derick Vollendorf

School: University of Wisconsin – Stout

Professor: Gary Borges, Associate Professor



The Flexible Packaging Association (FPA) maintains industry statistics and updates reports as data changes. Thus, dialogue with the U.S. Census Bureau, including reviewing data releases in connection with the U.S. Census Bureau's Annual Integrated Economic Survey (AIES), formerly the Annual Survey of Manufactures (ASM), and evaluating detailed long-term consistency by FPA is ongoing. Industry information is collected from the U.S. Departments of Labor and Commerce, the Census Bureau, the Bureau of Economic Analysis, industry analysts, investment banking reports, the economic analyst group Inforum, and other authoritative sources to provide a complete and more insightful picture of the flexible packaging industry. FPA's data and reports enable members to benchmark their performance in the industry and gain helpful insight to assist them in growing their businesses.

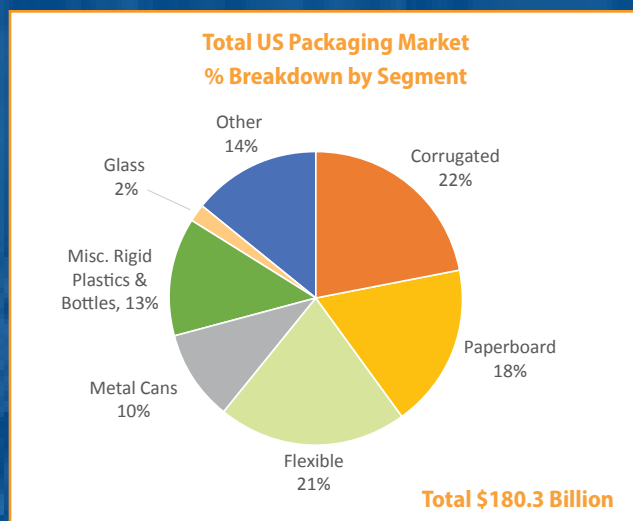
In 2023, the Business & Industry Research Committee continued to streamline FPA's survey efforts, and several changes were implemented. Both the converter and associate (supplier) surveys for the annual State of the U.S. Flexible Packaging Industry surveys were streamlined to help achieve higher participation rates.

New for 2023, the "Key Contact" named on the survey form from each company that submitted a survey received a \$25 Amazon gift card. Both the Associate and Converter surveys were also updated, deleting obsolete data, and including new questions to gather information on more relevant market data and industry trends. Participating members will receive access to FPA's new interactive dashboard that will allow companies to filter, search, and export data tailored exclusively to their needs from the raw aggregate data. This feature will be available in 2024. The Earnings (semi-annual) and the Operating Cost (annual) surveys originally were three (3) separate surveys that were combined into one (1) annual survey.

Annual State of the Flexible Packaging Industry Survey/Report (SOI)

The annual SOI is a definitive source of data and information and is utilized by industry converters, suppliers, investors, and analysts. The report examines several aspects of the U.S. flexible packaging industry, including sales and utilization levels, current profit trends, capital spending plans, industry M&A activity, projected growth areas, U.S. imports and exports, and end-use application information.

The U.S. flexible packaging industry was projected at \$42.9 billion in annual sales for 2022, up from \$37.2 billion in 2021, for a growth rate of 15.3%. Flexible packaging has grown steadily, including packaging for retail and institutional food and non-food, medical and pharmaceutical, industrial materials, shrink and stretch films, retail shopping bags, consumer storage bags, and wrap and trash bags, and is projected to continue to grow.



Source: Statistica, Flexible Packaging Association estimates, and Reportlinker.com

Flexible packaging represents 21% of the total \$180.3 billion U.S. packaging industry and is the second-largest packaging segment behind corrugated paper. Economic analysis group, Inforum, estimates that the flexible packaging industry will grow to \$44.7 billion in 2023, for a growth rate of 4.2%. The number from Inforum is just slightly more positive than the 3.7% growth that FPA converter companies are expecting in 2023. Inflation will continue to impact the actual growth rate.

Inforum estimates that the flexible packaging industry will grow to \$50.6 billion by 2027, for a CAGR of 3.3% from 2022-2027. For comparison, a recent report from Market Research Future estimates the global flexible packaging market to experience a CAGR of about 4.9% through 2030.

Annual Cost Earnings Survey/Report

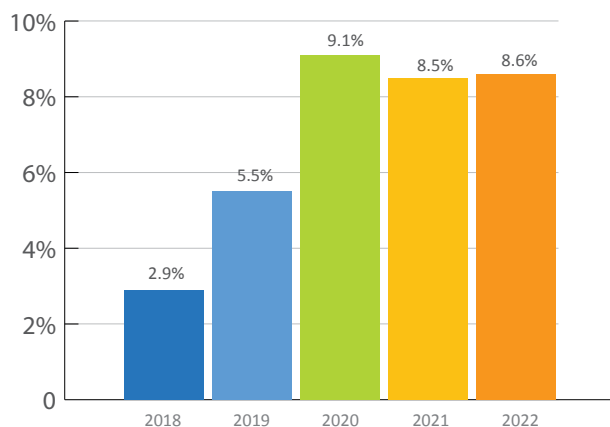
Published annually, this report examines key operating factors, including cost component information on labor; sales, general, and administrative expenses; materials and other manufacturing; receivables aging; capital spending; and inventory turnover. It also includes information on asset productivity and profitability performance with year-on-year comparisons. For the 2022 *Cost Earnings Report*, the most recent report available, 2022 net profit before tax composite results were 8.6%, just ahead of the 8.5% reported in 2021. However, 2021 results were higher than the 6.7% average of the previous five years. Since 2018, reported net profit rose over 200% to a high of 9.1% in 2020 and since then has remained relatively stable. The stability in profit margins in the past two years came in the wake of percentage increases in all major expense categories. Sales, admin, and other rose from 11.8% to 12.5%, direct labor rose from 7.9% to 9.1%, and other manufacturing expenses rose from 20.0% to 21.9%. However, materials used – as percent of net sales – declined from 52.1% to 49.7%. The report is only available to FPA converter members who participated in the corresponding survey.

Industry Compensation Survey/Report

The once-annual compensation survey is now conducted every three years unless another unprecedented event occurs that would impact the employment footprint of the industry and provides information on flexible packaging industry salary levels and hourly rates by company/plant size, region, and primary manufacturing operations.

The Compensation report was published in 2023 for 2021 data. The next report will be in 2025 for 2024 data. A new format was developed to make data analytics and viewing easier for members. The report includes a short executive summary of the key findings, and all of the aggregate data is presented in a separate Excel file. The report is only available to FPA converter members who participate in the corresponding survey.

**Net Profit Before Tax as a Percent of Net Sales,
2017-2021 (% of Sales)**



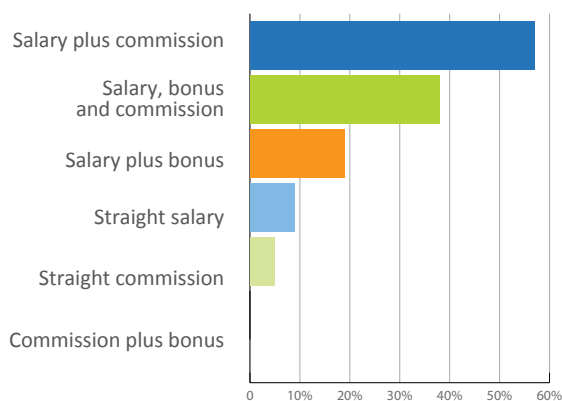
Source: Flexible Packaging Association

According to the most recent report available, the majority of respondents to the survey were large converters with annual net sales of \$100 million or more (39%) or mid-sized converters with annual net sales of \$25-\$99 million (35%). Smaller converters that have under \$25 million in annual net sales represented 22% of respondents. Fifty percent of companies consider their primary manufacturing operation to be multi-web converting.

All participating companies (100%) provide short-term disability coverage to both hourly and salaried employees. Long-term disability coverage is provided to 100% of salaried and 87% of hourly employees. A prescription drug plan is provided to 96% of both salaried and hourly employees.

Fifty-seven percent of the participating companies compensate their sales force with a salary plus commission method, while 38% use a salary, bonus, and commission method, which are the two most popular sales force compensation methods.

Sales Force Compensation Method



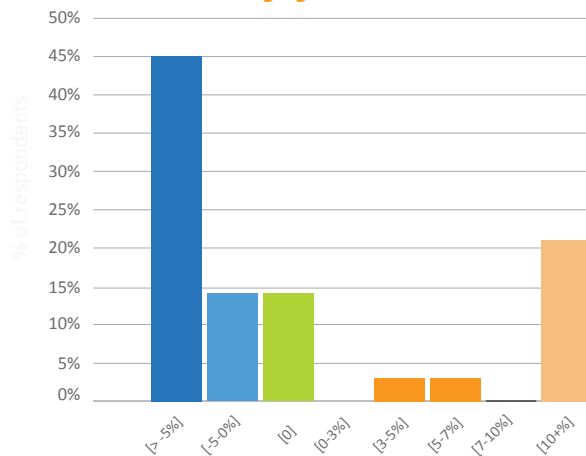
Note: Some survey participants used several methods

Source: Flexible Packaging Association

'Pulse of the Industry' Report

Published quarterly, the 'Pulse of the Industry' Report examines industry performance for net sales, profitability, inventory levels, volume, capital spending, and capacity utilization. According to the most recent report from the 3rd quarter of 2023, when looking at the rates in Q3 vs. Q2, almost half (45%) of respondents reported profitability had decreased by greater than 5%. This is very similar to the 48% who saw a profitability decrease in the Q2 2023 Pulse survey. Incidentally, in both this and the previous survey, about 20% saw profitability increase by over 10%, defying the general industry trend.

Profitability, Q3 2023 vs Q2 2023, All Flexible Packaging Converters



FPA/ChemPMC Polyolefin Market Reports

The bi-annual FPA polyolefin market reports examine key issues expected to influence the cost and availability of flexible packaging materials. Chemical & Polymer Market Consultants (ChemPMC) prepares the reports and presents on both polypropylene and polyethylene at the Annual Meeting and the FlexForward® Fall Conference.

Global Trends in Flexible Packaging, Euromonitor International



FPA partners with Euromonitor International to provide further market data and information to its members. Euromonitor's worldwide database provides current and forecast data on packaging units in all segments of the industry. FPA takes limited extracts from the Intelligence and incorporates the data into new reports or other original material, including the annual SOI report.

FPA and Euromonitor developed the Flexible Packaging Market Tracker which features 20 key flexible packaging country markets and highlights market dynamics, trends, and opportunities to expand business internationally.

The Market Tracker pulls insights directly from Euromonitor's proprietary data system, known as "Passport," which provides data on industries, economies, and consumers worldwide, helping to analyze market context and identify future trends.

The tracker is a customized research tool available only to FPA members to enhance the FPA website and tracks and compares flexible packaging markets

around the globe to help members better understand, prioritize, build business cases, and capture global market opportunities for flexible packaging. It enables members to access market information from around the globe, not only on flexible packaging materials and markets but non-flexible markets as well. It also helps FPA members understand the global packaging landscape, identify prospects for new technical packaging development, and pinpoint where growth opportunities lie.

The market tracker data is updated annually and in 2024 the Market Tracker will be updated with a "Product" tab as trends in consumer purchasing and products ultimately drive packaging decisions.

Industry Intelligence Inc. Supply Chain Report

Due to the unprecedented global supply chain challenges across our industry, FPA is partnering with Industry Intelligence Inc. on the daily *Supply Chain Report* to help keep a pulse on supply chain news and insights. Industry Intelligence produces and sends a custom report to the key contacts of each member company that is focused on technology, future supply chain disruptions, consumer trends, security, sourcing, and the economy. Both FPA and Industry Intelligence believe that access to timely and relevant information is critical in today's business environment.

International Markets



“Meetings Reimagined” Board Workgroup

During the March 2023 Board meeting, FPA created a “Meetings Reimagined” Board-level workgroup that is looking at the venue and content of the Fall meeting to determine ways in which FPA can make it more valuable and profitable. This group, which met for the first time in June and monthly thereafter, is also looking at enhancing the Annual Meeting as well. The first order of business for the group was to look at the Fall Executive Conference, as in recent years its growth has stagnated. It was determined that the Fall Executive Conference needed to be distinguished from the Annual Meeting in content and that a half day of technical education should be added. In keeping with FPA branding, the name was changed to the “FlexForward® Fall Conference.”

At the direction of the group, FPA President & CEO, Alison Keane, had conversations with potential partner associations, the Tag and Label Manufacturers Institute (TLMI), Association for Roll-to-Roll Converters (formerly AIMCAL), and the Technical Association of the Pulp and Paper Industry (TAPPI), to assess whether some collaboration could take place. While partnership discussions will continue for the 2025 FlexForward® Fall Conference, the group decided to implement some changes as discussed for the 2024 conference, including adding technical content with an emphasis on sustainability. Thus, FPA will reach out to the industry with a call for speakers and tap into our Achievement Award winners for additional content. This is in addition to the content that we have historically provided during this meeting and will change the event from one day to one and a half days.

Additional revenue opportunities are also being considered for the FlexForward® Fall Conference including additional sponsorships and tabletop exhibits. There will be up to 8 tabletop exhibits available for members to showcase their products and services to the industry who will attend the conference and we will evaluate its success for future events.

As work continues to “reimagine” the FlexForward® Fall Conference, the workgroup has also begun to work on the 2025 Annual Meeting, which will be a special event as FPA will celebrate its 75th anniversary.

Annual Meeting

The 2023 Annual Meeting took place at the Ritz-Carlton, Amelia Island, and 342 industry professionals and their guests gathered for education and networking. The content-rich educational program included a session from Kraft Heinz Company where Linda Roman, Associate Director of Packaging addressed the company’s packaging goals as they relate to sustainability; Rebecca Marquez, Director of PMMI Media Group Custom Research shared the findings of the FPA/PMMI research report on operational challenges experienced by CPGs when transitioning between different flexible materials. FPA President & CEO, Alison Keane, provided an update on the state of the U.S. flexible packaging industry. Additionally, there was an update on the polyethylene market; diversity, equity, and inclusion (DE&I); a panel discussion on advanced recycling; and an update on the activities of FPA’s Emerging Leadership Council (ELC).

Networking events included a gathering of the ELC; several informal receptions; two luncheons; a golf tournament; and our Welcome & Flexible Packaging Achievement Awards Dinner which celebrates excellence in flexible packaging by recognizing our Achievement Awards Competition winners.



The Advanced Recycling Panel at the Annual Meeting



Kuma Roberts (Arrowhead Consulting) at the Annual Meeting



Linda Roman (The Kraft Heinz Company) at the Annual Meeting



Attendees at the Annual Meeting

Thank You to our 2023 Sponsors

FPA would like to thank our sponsors for 2023 for their generous contributions and support in helping to make our meetings successful.



Platinum Sponsor:



Gold Sponsors:



Flexible Packaging



eProductivity Software



Shell Polymers



Pregis



FlintGroup



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Avery Dennison Corporation

Berry Global

Glenroy, Inc.

Hosokawa Alpine American, Inc.

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Sun Chemical Corporation



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ACTEGA

Bostik, Inc.

BW Converting Solutions

Davis-Standard, LLC

HP, Inc.

Siegwerk

TC Transcontinental Packaging

Wikoff Color Corporation



Annual Meeting Golf Tournament Sponsors:

Hudson Sharp

Paper Converting Machine Company (PCMC)

Terphane LLC

FlexForward® Fall Conference

As the FPA evolves, so has the Fall Executive Conference which is now known as the FlexForward® Fall Conference. The 2023 event was centrally located in Kansas City, MO, and provided attendees with the opportunity to learn more about sustainability from Kristin Edie, VP of Enterprise Sustainability at Hallmark. Conference attendees also had the opportunity to learn about the regulatory and legislative happenings at the federal and state levels from our Serlin Haley team, Lauren Aguilar and Andy Hackman. Amanda Gore “wowed” conference participants with a funny and thought-provoking session on the “Power of Joy” at the networking luncheon. There was also an update on the European flexible packaging market and the polypropylene market, and a presentation focusing on U.S. consumer trends.

The 2023 FlexForward® Fall Conference enjoyed a member attendance increase of 12.7%, and a 300% increase in prospective members when compared to the 2022 Fall Executive Conference. The conference revenue also increased by 37%.



October 12, 2023 | Kansas City, Missouri



Attendees at the FlexForward® Fall Conference

Officers & Executive Committee**William (Bill) Jackson, Ph.D.**

Amcor Flexibles
Chair of the FPA Board of Directors

Kathy Bolhous

Charter Next Generation
Past-Chair of the FPA Board of Directors

Guenther Hering

Henkel Corporation
Treasurer

Curt Begle

Berry Global
Executive Committee Member at Large

Stan Bikulege

Novolex
Executive Committee Member at Large

Dhuanne Dodrill

PAXXUS, Inc.
Executive Committee Member at Large

Russell Grissett

Sonoco Flexible Packaging
Executive Committee Member at Large

Kevin Keneally

PPC Flex
Executive Committee Member at Large

David Love

Printpack
Executive Committee Member at Large

Board of Directors**Evan Arnold**

Glenroy, Inc.

Todd Becker

NOVA Chemicals, Inc.

Sean Bowie

Bryce Corporation

Jarred Carter

Siegwerk

Laura Clark

SEE®

Sachin Desai

ProAmpac

Kenneth Fontaine

AMGRAPH Packaging, Inc.

Mark Forman

Belmark inc

Ritika Kalia

Dow

Kevin Kelly

Emerald Packaging, Inc.

Nicki Kerrigan

Flint Group

Jeff Koch

American Packaging Corporation

Amy Moore

Westlake Corporation

Thomas Morin

TC Transcontinental Packaging

Joe Moynihan

Mondi Jackson LLC

David Nunes

Hosokawa Alpine American, Inc.

Chris Parrilli

Sun Chemical Corporation

Geoff Peters

Wikoff Color Corporation

Kristin Thomas-Martin

ExxonMobil Chemical Company

Andrew Wheeler

Windmoeller & Hoelscher
Corporation



William (Bill) Jackson, Ph.D., CTO
Amcor Global Flexible Packaging, Amcor
Flexibles and Chair of the FPA Board of
Directors

LEADERSHIP

Chairperson's Advisory Council

Eric Erickson, III
Kendall Packaging Corporation

Kasie Fairbarn
Windmoeller & Hoelscher Corporation

Catherine Heckman
Bostik, Inc.

Marc Leclair
St. Johns Packaging, Ltd.

Chris Osborn
Amcor Flexibles

Jonathan Quinn
Accredo Packaging, Inc.

Madeleine Robinson
LPS Industries, LLC

Keith Smith
Vonco Products, LLC

David Staker
PPC Flex

Fredy Steng
Berry Global

Adrianne Tipton
Novolex

Emerging Leadership Council (ELC)

Kasie Fairbarn
Windmoeller & Hoelscher Corporation
Co-Chair

Jonathan Quinn
Accredo Packaging, Inc.
Co-Chair



From left to right: **Adrianne Tipton**, Novolex; **Kathy Bolhous**, Charter Next Generation; and **Kasie Fairbarn**, Windmoeller & Hoelscher Corporation



From left to right: **Joseph Tocci**, Intertape Polymer Corp. d/b/a Intertape Polymer Group; **David McKinney**, ISOFlex Packaging; and **Todd Becker**, NOVA Chemicals, Inc.



From left to right: **Stan Bikulege**, Novolex; **Alana Carr**, Hosokawa Alpine American, Inc.; **David Nunes**, Hosokawa Alpine American, Inc.; **Don Katz**, Max Katz Bag Company, Inc.; and **Jim Campbell**, Hosokawa Alpine American, Inc.



From left to right: **Kris Steinbeck**, Windmoeller & Hoelscher Corporation; **Kasie Fairbarn**, Windmoeller & Hoelscher Corporation; **Reiss McKinney**, ISOFlex Packaging; and **Adrianne Tipton**, Novolex

Mission Statement

The Flexible Packaging Association is a strategic organization and the voice of the “value-added” segment of the U.S. flexible packaging industry. The mission includes facilitating industry advancement and providing a forum for industry leaders. This mission will be accomplished through meeting the strategic goals of:

1. Promoting and protecting the benefits, contributions, and advantages, including the sustainability of the value-added segment of the flexible packaging industry.
2. Researching, collecting, analyzing, and providing FPA members easy access to industry data and market information to help members benchmark and recognize trends and opportunities.
3. Providing representation and advocacy for the flexible packaging industry before stakeholders, including government, retailers, customers, and consumers.
4. Providing educational and networking opportunities for industry leaders.

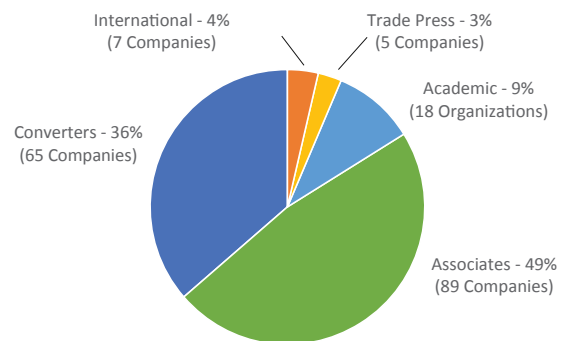
New Member Category

In 2023 a new “Supporting” member category was approved by the Board of Directors. This new category is for non-manufacturing companies that support the industry. Supporting membership is open to any firm or corporation, or division thereof, engaged in the distribution of materials, equipment, supplies, or flexible packaging, and businesses providing services, within the U.S. and having sales in the U.S. of materials, equipment, supplies, or flexible packaging, or services to the flexible packaging industry, and also includes the banking sector. Members in this category do not have voting rights and are not eligible for a seat on the FPA Board of Directors.

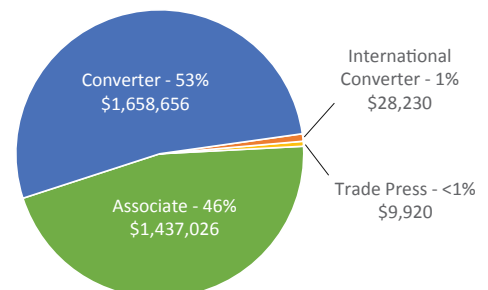
“Member Engagement” Board Workgroup

Also at the March Board meeting, a “Member Engagement” Board-level workgroup was formed. This committee’s goal is to have existing members work on recruiting non-members with whom they already have relationships. FPA, along with the workgroup, developed a list of converter companies, suppliers, as well as companies that are eligible for the new “Supporting” member category (approved at the October 2022 Board meeting, with dues parameters approved at the March 2023 meeting). The workgroup is identifying the correct contacts at each of the prospective member companies so that we can send introductions along with updated membership information. Our new Director of Membership and Meetings, Emily Patten, is also calling on these companies.

185 Companies as of December 2023



Company Dues Breakdown as of December 2023 - \$3,133,832



Save the Date!



Loews Ventana Canyon Ranch
Tucson, Arizona
March 20 - 22, 2024

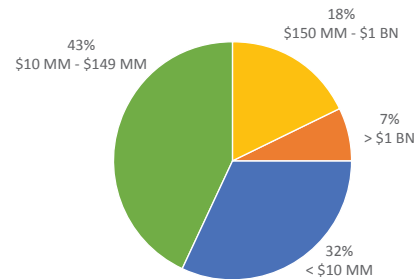
FPA FLEX FORWARD
FALL 2024
CONFERENCE

September 17-19 | Charlotte, North Carolina

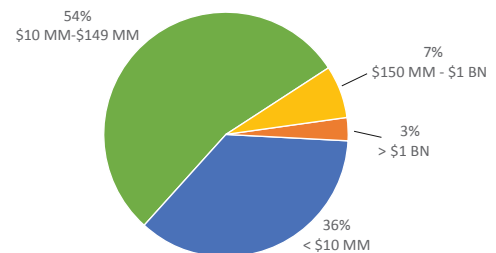
Omni Hotel
Charlotte, North Carolina
September 17 - 19, 2024

Converters and Associates represent the largest number of members. While Converters represent 36% of FPA members, they provide 53% of FPA's dues revenue. Associates represent 49% of the membership and 46% of revenues.

Converter Company Breakdown



Associate Company Breakdown



2023 FPA Companies

Converter Companies

Accredo Packaging Inc.
Admiral Packaging, Inc.
Advanced Web Technologies – Illinois, Inc.
AeroFlexx
Ampcor Flexibles
American Packaging Corporation
AMGRAPH Packaging, Inc.
Beacon Converters, Inc.
Belmark inc
Berry Global
Brook + Whittle
Bryce Corporation
Catty Corporation
Celplast Metallized Products Limited
Constantia Flexibles
Cosmo Films Limited
C-P Flexible Packaging
DazPak Flexible Packaging
Emerald Packaging, Inc.
Flex Films (USA) Inc.
Fres-co System USA, Inc.
Glenroy, Inc.
Gualapack US Corp.
Hart Flex Pack
Hazen Paper Company
INDEVCO Packaging Solutions
Inland Packaging
Integrated Plastics Packaging
Intertape Polymer Corp d/b/a
Intertape Polymer Group
Kendall Packaging Corporation
Louisiana Plastic Industries
MAR-CO Packaging
Max Katz Bag Company, Inc.
Mondi
Nosco
Novolex
PAXXUS, Inc.
Phenix
Poly Print, Inc.
Polymerall Flexible Packaging
PPC Flex
Pregis
Prime Packaging, LLC
Printpack
ProAmpac
ProMach – CL&D Graphics
Rol-Vac, LP
Südpack Oak Creek Corporation
Sealstrip Corporation
SEE® (Sealed Air Corporation)
Sonoco Flexible Packaging
Southern Graphic Systems LLC
St. Johns Packaging Ltd.
SteriPax
SunDance
SunFlex Packagers Inc.
Taylor Prime Labels & Packaging
TC Transcontinental Packaging
Technipaq, Inc.
TekniPlex, Inc.
Traco Manufacturing, LLC d/b/a Traco Packaging
Verdafresh, Inc.
Vonco Products, LLC
Winpak Ltd.
Zacros America, Inc.

International Converter Companies

Emirates Printing Press, L.L.C.
 Hotpack Packaging Industries LLC
 Paharpur 3P
 Peliculas Plasticas S.A. de C.V.
 Polykar
 Productos Alimenticios Bocadeli S.A. de C.V.
 Tempo Flexible Packaging

Associate Companies

AccuTec
 ACS Group
 ACTEGA
 ALLIEDFLEX Technologies, Inc.
 Ampacet Corporation
 B&B Packaging Technologies L.P.
 Bamberger Polymers, Inc.
 Baystar
 Bobst North America Inc.
 Bostik, Inc.
 Charter Next Generation
 Chemours Company FC LLC, The
 Chevron Phillips Chemical
 Circulus Holdings, PBLLC
 Cloeren Incorporated
 Clysar, LLC
 CMD Corporation
 Coim USA, Inc.
 Comexi North America, Inc.
 Dürr Systems, Inc.
 Davis-Standard, LLC
 Dow
 DuPont
 Duraco Specialty Materials
 Energy Sciences, Inc.
 eProductivity Software

ExxonMobil Product Solutions
 FILMtech Inc.
 Flint Group
 Frain Industries
 Fujifilm North America Corporation,
 Graphic Communication Division
 Gulfpac Americas Inc.
 H.B. Fuller
 Harper Corporation of America
 Henkel Corporation
 Hosokawa Alpine American, Inc.
 HP, Inc.
 Hudson-Sharp
 INX International Ink Co.
 ISOFlex Packaging
 Karlville North America
 Koenig & Bauer Flexotecnica
 Kuraray
 LyondellBasell
 MacDermid Graphics Solutions
 Mamata Enterprises, Inc.
 Maxcess International
 Mica Corporation
 Michelman
 Mid South Extrusion
 Miraclon, Home of Kodak Flexcel Solutions
 Mitsubishi Chemical America, Inc.,
 Polyester Film Division
 Mitsui Chemicals
 Morchem, Inc.
 Nobelus
 Nordmeccanica, NA
 Nordson Corporation - PPS
 NOVA Chemicals, Inc.
 Paper Converting Machine Company (PCMC)
 Pearl Technologies Inc.

Polo Films Industria e Comercio SA
PolyExpert Inc.
Polyplex USA, LLC
Preco, LLC
Presto Products Company FRESH-LOCK®
Closure BU
Profol
Reifenhauser Inc.
RKW North America, Inc.
Ropak Manufacturing Company, Inc.
SABIC
Screen GP Americas, LLC
Shell Chemical LP
Ship & Shore Environmental, Inc.
Siegwerk
SKGC-Americas
Sun Chemical Corporation
Sung An Machinery Company, Ltd. (SAM)
Terphane LLC
TOPPAN USA, Inc.
Toyo Ink America, LLC, an Artience Group Company
Transcendia
Troika Systems Ltd.
UBE America Inc.
UTECO North America, Inc.
Westlake Corporation
Wikoff Color Corporation
Windmoeller & Hoelscher Corporation
XSYS Global

Academic Companies

California Polytechnic State University
Clemson University
Conestoga College
Fox Valley Technical College
Government Institute of Printing Technology,
Mumbai
Indiana State University
La Roche College
Michigan State University School of Packaging
Missouri University of Science and Technology
Monterrey Institute of Technology and
Higher Education
Murray State University
Pittsburg State University
Rochester Institute of Technology -
Department of Packaging Science
Rutgers, the State University of New Jersey
San Jose State University Packaging Program
University of Florida
University of Wisconsin - Stout
Washington State University

Trade Press Companies

BNP Media
Converting Quarterly
Industry Intelligence Inc.
Packaging Impressions
PMMI Media Group

WHAT'S TO COME

Advocacy

We will continue to see a host of states with various packaging legislation – this does not mean just extended producer responsibility (EPR) legislation. 2024 will continue a shift we saw in 2023 to focus on “needs assessment” bills for data gathering as the precursor to full EPR bill programs. We will also see labeling for recyclability and toxics in packaging bills, as well as post-consumer recycled content bills. As full EPR programs are harder to manage and harder to get passed, particularly in an election year, the trend of smaller, bite-size approaches to packaging mandates will be the theme in 2024.



2024 will also see an increased focus on the implementation of the EPR programs in the four states that passed legislation – Maine, Colorado, Oregon, and California, as well as the needs assessment states – Maryland and Illinois. FPA will continue to monitor and respond to the regulatory developments regarding these initiatives. Proactively, FPA will continue to work through our partners and coalitions to promote these initiatives as vehicles to get flexibles collected, sorted, and reprocessed. In 2024, FPA will join the Plastic Association's new Flexible Film Recycling Alliance, which will work on a more robust zip-code locator for the store drop-off program for flexibles, as well as consumer outreach and education to heighten awareness and use of this tool. A major push in 2024 is to reengage consumers and policymakers of the substantial carbon and food waste reduction benefits of flexible packaging. FPA will formally launch its FlexPAC™, our new political action committee, and hopes to position the Association smartly for federal recyclability legislation in 2025.



From left to right: **Alison Keane**, Flexible Packaging Association; U.S. Senator **Tammy Baldwin** (D-WI); and **Phil Rozenski**, Novolex

Sustainability

Late in 2023, the Biden Administration put out a draft of the “National Strategy for Reducing Food Loss and Waste and Recycling Organics.” The purpose of the strategy is to “announce steps to reduce waste and increase recycling of organics to reduce climate pollution, save families and businesses money, and support a circular economy for all.” As packaging and flexibles are key to the success of any strategies, FPA will use this vehicle to highlight the benefits of flexible packaging in the reduction of greenhouse gas emissions for the manufacture and transport of the packaging and products as well as the prevention of food waste in the supply chain. To continue these discussions with the FDA, USDA, and EPA, FPA will update its 2014 report “The Role of Flexible Packaging in Reducing Food Waste” in 2024.



Communications

The promotion of FPA’s 2023 Pet Food LCA and 2024’s food waste reduction report update will take center stage in communications both internally with the membership and with external stakeholders and policymakers. FPA will implement a new PR campaign in 2024 in an effort to expand our reach outside of industry trade press and paid op-eds. And consumer education will be a priority this year, with FPA’s Emerging Leadership Council’s content creation highlighting that every day is Earth Day with flexible packaging. New content on PerfectPackaging.org, as well as social media, will focus on flexible packaging, including flexible plastic packaging as ProPlanet!

Industry Data

At the end of 2023, FPA added staff to a new position, Director, Industry Information. This position will work on FPA’s core reports, such as the “State of the U.S. Flexible Packaging Industry,” “Compensation” “Pulse of the Industry,” and “Cost Earnings.” This position will also start to do trend analysis, and our Flexible Packaging Market Tracker will be updated with a “Product” tab as trends in consumer purchasing and products ultimately drive packaging decisions.



FPATM

**Flexible Packaging
Association**

185 Admiral Cochrane Drive | Suite 105 | Annapolis, MD 21401

(410) 694-0800 | fpa@flexpack.org | www.flexpack.org

