



**FPA**<sup>TM</sup>

Flexible Packaging  
Association

REPORT TO  
THE MEMBERS  
2019

# TABLE OF CONTENTS

<b>Letter from the President and CEO.....</b>	<b>3</b>	<b>Industry Data.....</b>	<b>20</b>	
<b>Advocacy.....</b>	<b>4</b>	<ul style="list-style-type: none"><li>• State of the Flexible Packaging Industry Report (SOI)</li><li>• Pulse of the Industry Report</li><li>• Earnings Report</li><li>• Operating Cost/Ratios Report</li><li>• Flexible Packaging Industry Compensation Report</li><li>• FPA/IHS Markit Polyolefin Market Reports<ul style="list-style-type: none"><li>• Polyethylene</li><li>• Polypropylene<ul style="list-style-type: none"><li>• FPA/IHS Markit Webinar on Metallocene LLDPE, February 21, 2019</li><li>• FPA/IHS Markit Webinar on EVA Copolymers, June 20, 2019</li></ul></li></ul></li><li>• Global Trends in Flexible Packaging, Euromonitor International</li></ul>		
<ul style="list-style-type: none"><li>• Federal Efforts</li><li>• State Efforts</li><li>• Online Conversation Overview</li><li>• Technology &amp; Regulatory Affairs</li><li>• Environmental Health and Safety Committee<ul style="list-style-type: none"><li>• “Once-in-Always-in” (OIAI) Policy</li><li>• Risk &amp; Technology Review of Paper &amp; Other Web Coatings (POWC)</li><li>• Per-and polyfluoroalkyl substances (“PFAS”)</li><li>• OSHA Log Out-Tag Out (LOTO) Standard</li></ul></li></ul>				
<b>Sustainability.....</b>	<b>10</b>	<b>Networking.....</b>	<b>24</b>	
<ul style="list-style-type: none"><li>• Hefty® EnergyBag® Program</li><li>• Materials Recovery for the Future (MRFF)</li><li>• Advanced Packaging Recycling Project</li></ul>		<ul style="list-style-type: none"><li>• FPA Annual Meeting</li><li>• FPA Fall Executive Conference</li></ul>		
<b>Sterilization Packaging Manufacturers Council (SPMC).....</b>	<b>12</b>	<b>Leadership.....</b>	<b>26</b>	
<ul style="list-style-type: none"><li>• Updated Mission Statement<ul style="list-style-type: none"><li>• SPMC Mission</li><li>• Technical Committee Mission</li><li>• Marketing Committee Mission</li></ul></li><li>• SPMC Learning Tools: A Guide to Gels and Sterile Barrier Integrity Measures Webinar</li><li>• SPMC Launches New Website</li></ul>		<ul style="list-style-type: none"><li>• Officers &amp; Executive Committee</li><li>• Board of Directors</li><li>• 2019 Chairman’s Advisory Council</li></ul>		
<b>Promotion.....</b>	<b>14</b>	<b>Membership.....</b>	<b>28</b>	
<ul style="list-style-type: none"><li>• Leveraging Results from the 2018 Sustainability Research Study and 2019 Sustainability Report, <i>A Holistic View of the Role of Flexible Packaging in a Sustainable World</i></li><li>• FPA Expands Social Media Program</li><li>• FPA Magnifies Industry Communications</li><li>• Flexible Packaging Achievement Awards Competition</li></ul>		<ul style="list-style-type: none"><li>• Mission Statement</li><li>• FPA Membership<ul style="list-style-type: none"><li>• Converters</li><li>• International Converters</li><li>• Associates</li><li>• Academic</li><li>• Trade Press</li></ul></li></ul>		
		<b>What’s to Come.....</b>	<b>34</b>	
		<ul style="list-style-type: none"><li>• Advocacy</li><li>• Sustainability</li><li>• Promotion</li><li>• Industry Data</li></ul>		

## Letter from the President & CEO

2019 presented the Association and its members with the most challenging year yet concerning anti-plastic sentiment and packaging legislation that could negatively impact the industry. As usual, the industry rose to the occasion and brought forth concrete alternatives that provide real solutions to the knee jerk reaction legislation we saw introduced at both the state and federal levels. While we were successful in ensuring that no legislation was passed this year, 2020 will see the return of many of the same bills.

Where many U.S. policy makers were reacting emotionally to the highly charged issues of single-use plastics and marine debris, FPA and its membership concentrated on the real issues, which are the outdated recovery and recycling infrastructure in the U.S. and the lack of viable end-of-life management systems for today's packaging, including flexible packaging, which is not "single-use." FPA assisted in the introduction of the RECOVER Act at the federal level, which will incentivize new technology in the U.S. for recycling and composting infrastructure. In addition, we submitted comments and amendments to several bills at the state and federal level regarding packaging end-of-life management that would provide real solutions. FPA also started a dialogue with an NGO representing state and local solid and hazardous waste management professionals in order to come to a consensus on alternative legislation that would solve end-of-life for packaging.

The Association's education and outreach to policy makers and to consumers was also heightened in 2019, with Facebook, LinkedIn, and Instagram additions to our social media platform and communications materials (i.e., fact sheets, infographics, brochures) leveraging our environmental lifecycle benefit analyses of flexibles versus other packaging types. FPA will continue to "fight the good fight," with regard to the war on plastics using science and education, in order to preserve truly sustainable and lifesaving packaging and avoid the unintended consequences of flexibles being sacrificed for less environmentally beneficial alternatives.

Sincerely,



Alison Keane

*President & CEO*

# ADVOCACY

2019 showed the most significant amount of attention to date in the U.S. around packaging, particularly plastic packaging and single-use plastics, with bills in 4 states and a concept outline at the Federal level; and while none of the bills were passed this year, all will be back for 2020. In order to help FPA better advocate on behalf of the industry, the Executive Committee met in June to form a position for the Association. Key advocacy points that were established at that meeting are:

- Flexible packaging is the environmental choice due to its environmental benefits, including reduced water and energy use, food waste, transportation impacts, material to landfill, and green-house gas emissions;
- The definition of single-use plastics should not include hermetically sealed packaging that protects the product throughout transport, sale, and use, including food, pharmaceutical, and medical device packaging;
- Investment in infrastructure is needed and waste-to-energy (WTE) technologies must not be dismissed;
- Consumer behavior must be influenced to reduce pollution and increase recovery/recycling.

These themes were expressed throughout FPA's testimony in 2019 and will be the continuing themes as we work towards a resolution of the various state and federal activities on this front going forward.



Congressman Hollingsworth's visit to Berry Global, Bloomington, Indiana

## Federal Efforts

On the federal front, we are still working on trade issues with a push to get the United States-Mexico-Canada Agreement ratified. Trade talks continue with China as well. With the impeachment proceedings and an election year in 2020 (Presidential, all House, and 1/3 of Senate), FPA believes that getting these trade agreements in place soon is vitally important. Despite the impeachment adding to the already chaotic administration this year, some progress was made with a bill on recycling infrastructure, with the introduction of the Realizing the Economic Opportunities and Value of Expanding Recycling Act (RECOVER Act).

FPA is part of a broad coalition that worked to draft and get the RECOVER Act introduced. FPA supports the RECOVER Act, as we believe that a suite of options is needed to address the lack of recovery and recycling infrastructure for flexible packaging materials. Investment in that infrastructure is necessary before new mandates and unrealistic goals are set for both producers and consumers and before short-sighted bans are imposed. We cannot expect to have any waste management and recycling system, whether federal, state, or local, if we do not have the infrastructure to manage it. Current infrastructure is not adequate to process even the readily recyclable packaging that is being produced, let alone the flexible packaging that has emerged over the last two decades. The RECOVER Act will address the need to expand recycling infrastructure in the U.S. and create end-markets, diminishing the need for Extended Producer Responsibility (EPR) legislation at the federal or state level.

EPR is a system where producers (usually brand owners) are required by law to fund and manage the recovery and recycling or safe management of their products and packaging. While there are no EPR laws for packaging currently in place in the U.S., EPR laws for packaging, however, have been operating in Canada

for over 15 years and in Europe for over 30 years. These programs range from “full producer responsibility” systems where producers finance and manage the program (and retain ownership of the materials), to “shared responsibility” and hybrid systems, where governments take more responsibility for operating the program that producers largely finance. FPA does not support EPR systems that are merely an alternative funding mechanism for municipal solid waste systems – where producers pay but get little or no say in the management of the system. In Europe and Canada, WTE and other recovery technologies are alternatives to landfill for high BTU value materials that might otherwise be difficult to mechanically recycle, and count as an interim option as governments seek to move to recycling systems for all materials. To date, WTE technologies have been difficult to implement in the U.S. due to government and NGO opposition.

Under FPA’s policies, any packaging legislation must address infrastructure needs first; should look at the entire lifecycle of the packaging and not just its recyclability or compostability; should treat WTE as a viable option, at least while more advanced technologies are brought to scale for packaging waste; utilize funding for new infrastructure and not just reimbursement for current infrastructure; and must involve the consumer in order to bring about meaningful change. Thus, a “Discussion Draft” circulated for a federal EPR program for product and packaging waste in 2019 was not supported by FPA as it does not adequately address any of these concepts. FPA commented on the discussion draft to this effect as well as on a host of other issues we found problematic with the overall approach. Our comments were similar to the comments we submitted on the bill in California this year as well as an EPR program outline from Maine, which is discussed under state efforts on the next page.

# ADVOCACY

## State Efforts

The year started with a bill in Washington State (Senate Bill 5397: “An Act relating to the responsible management of plastic packaging”), which was an ambitious EPR bill for plastic packaging. This was followed by a report in Rhode Island by the Governor’s Task Force to “Tackle Plastics,” which recommended plastic bag and straw bans in the short term and education and EPR in the long term, but did not result in legislation being introduced this year. This was followed by a straw proposal in California for specific rates of municipal solid waste reduction, recycling, and composting by specific dates, which producers would have to meet in order to continue to sell their products and packaging in the State. The California bill (Senate Bill 54/Assembly Bill 1080) went farther than any plastic and packaging legislation in 2019, and was amended numerous times in an attempt to provide clarity and address major shortcomings, but ultimately failed to do so and was not brought up for a final vote. Finally, in Maine, the legislature passed a resolve to study EPR for packaging, which resulted in a conceptual model for a packaging EPR system designed to be introduced in 2020.

Ultimately, the bill in Washington State was made into a study bill, with a report due in early 2020. The California bill was made a “two year” bill, which means it will be back in January 2020, starting where it left off on the floors of both houses. Maine will likely have a bill based on the discussion outline circulated. Vermont also began discussions on packaging EPR this year in anticipation of legislation in 2020, and New York and Massachusetts are also working on various packaging proposals/bills that may have legs next year.

As FPA continues to believe that there will not be just one solution to the issue of packaging waste, we continue to pursue multiple programs/platforms that will

help our members in the debate. Two of our continued infrastructure projects, the Materials Recovery for the Future (MRFF) and the Hefty® EnergyBag® Program are updated in the “Sustainability” section of this report, along with a new partnership with the University of Florida and their Advanced Recycling Center.

Two others, one instrumental in supplementing our efforts in California, called Californians for Recycling and the Environment (CRE), and the other, a dialogue with multiple state and local governments as well as NGO’s facilitated by the Product Stewardship Institute (PSI) were started in 2019. CRE is a grassroots effort in California, which ran parallel with the legislation, but unlike our traditional lobbying efforts (working with the sponsors and staff on the legislation itself), CRE was also focused on consumer education and outreach on what the bill did and what the bill did not do. While most consumers would like to see plastic pollution and single-use plastic waste reduced as the title of the bills proclaimed, the bills did little to outline how this would actually happen and affected all packaging, not just single-use plastic items.



Congressman Hollingworth's visit to Berry Global, Bloomington, Indiana



Congressman Hollingsworth's visit to Printpack, Bloomington, Indiana

FPA opposed the bills given the unprecedented authority granted to the State Agency, CalRecycle, to implement what FPA considers arbitrary and unworkable rates and dates; the lack of recovery and recycling infrastructure and the necessary funding mechanisms to create it; the onus on the producers to ensure consumers actually recycle; and its defacto bans on many of the products consumers use on a daily basis that are not single-use items. In fact, business to business packaging is included in the bills as well as hermetically sealed food packaging, which keeps food fresh and safe for months before it is even purchased by the consumer. Even pharmaceutical packaging is included, with industry barely able to convince the authors to exempt medical device packaging. With CRE, we brought that message to residents of California in an attempt to educate them on all the everyday products that would be impacted should the bills pass as drafted. Instead, FPA, through our state lobbyist, Serlin Haley, as well as CRE and two broad based coalitions working on the bill, put forth changes and amendments to the bills in order to provide for workable solutions, unfortunately to no avail. We will continue to work with the sponsors, as well as the residents of California, to find viable solutions to packaging waste issues in the state in 2020.

PSI is an organization that represents state and local government environmental agencies responsible for managing hazardous and solid waste. PSI facilitates

dialogues with industry to find consensus-based solutions that benefit all key stakeholders, particularly industry and government. PSI advocates for EPR as a solution for consumer products and packaging, and has been instrumental in educating stakeholders about EPR, building capacity for EPR in the U.S., developing effective legislative models for EPR, and passing EPR laws in the U.S. for a wide variety of products. FPA engaged PSI to facilitate a dialogue on packaging waste, primarily flexible packaging, in order to find key concepts on which industry and government can agree. Educating government participants on the environmental benefits of flexible packaging and the various ongoing projects to provide for its end-of-life is a key component to avoiding product bans. Learning from state and municipal governments about what they need to advance collection and recovery of our products is at least one piece to the packaging waste puzzle. If successful, the dialogue could be opened to other packaging formats to do the same, with a potential workable solution either on a state-by-state basis or a federal one, instead of the piecemeal approaches we are seeing across the country now.

### Online Conversations Overview

Flexible packaging conversation monitoring for the first half of 2019 often mentioned the increasing popularity of flexible packaging and noted that the flexible packaging industry is expected to grow. Several large companies, such as Amazon, are adopting flexible packaging. However, the increasing number of companies pledging to use recycled plastic could be a challenge for the industry.

During the first half of 2019, there were roughly 24,800 mentions of "flexible packaging" in online news and social media conversations, earning an estimated 150.3 million potential impressions. The volume decreased from 34,800 mentions and 554.2 million potential impressions during the second half of 2018. These mentions included news about companies that produce flexible packaging and conversations about the state of the market and

# ADVOCACY

market growth. The volume of online media and social media mentions decreased during this period due to less news about flexible packaging products and companies that make flexible packaging, though these were still a significant part of the conversation. Together, sustainability and recycling/end-of-life topics about flexible packaging made up roughly 19% of online flexible packaging conversations.

## Technology and Regulatory Affairs

In response to Executive Orders that directed the federal agencies to reduce regulatory burdens on domestic manufacturers, as well as ongoing rulemakings by Federal Agencies, FPA submitted comments on a host of candidates for repeal, replacement, or modification. FPA continues to monitor developments and act as necessary, including forming partnerships with other trade associations to present a collective front on issues of mutual concern. The forced leadership changes at the U.S. Environmental Protection Agency (EPA) and the political climate has made it difficult for the industry to develop an effective regulatory strategy.

## Environmental Health and Safety Committee

The Committee had three in-person meetings during 2019. Additionally, the committee engaged via conference calls on an as needed basis. Each meeting agenda includes an in-depth analysis of regulatory issues relevant to FPA members, including action items that may include meeting with regulators, submitting written comments, or joining a coalition for a collective industry response. These efforts are intended to achieve regulatory outcomes that help reduce compliance burden and economic costs to FPA members. The discussion of issues during in-person meetings is critical to getting FPA ready to act when issues arise. The following are a few specifics of the committee's work:



Congressman Hollingworth's visit to Berry Global, Bloomington, Indiana

## "Once-in-Always-in" (OIAI) Policy

EPA has been trying to reverse its "once-in-always-in" Clean Air Act policy for some time, which was published in 1995. EPA took the position that facilities that are major sources of Hazardous Air Pollutants must permanently comply with the applicable standard even if the source subsequently became an area source by limiting its potential to emit. The policy creates compliance burdens and has economic implications for facilities. Over the years, FPA advocated for the repeal of this policy with no success. This year, EPA published a rulemaking to finalize the withdrawal of the policy in an unprecedented move to put the matter to rest. The rulemaking was published on June 25, 2019, and FPA submitted comments in support of the proposed rule.

## Risk & Technology Review of Paper & Other Web Coatings (POWC) MACT Rule

FPA has been fully engaged with EPA since they entered into a consent decree with environmental groups requiring EPA to complete the risk and technology review of POWC Maximum Achievable Control Technology rule, as the outcome will have a significant economic impact on FPA members. Our efforts have provided EPA a better understanding of the coatings process and how emissions are effectively controlled

with the use of innovative technology. We're pleased to report that EPA completed the risk evaluation and determined that risks from this source category are acceptable and the standard continues to provide an ample margin of safety to protect public health and the environment. Thus, the agency recommended no changes to control technologies at this time, which is a big win for FPA members. FPA submitted comments in support of the proposed final rule that came out in October.

### Per-and polyfluoroalkyl Substances (“PFAS”)

PFAS are a large and diverse group of chemicals that have been used in a broad number of beneficial industrial applications for years. Their use includes products ranging from fabrics for furniture, to nonstick cookware to firefighting foam. The recent increased attention to potential health effects of certain PFAS has led to public concerns and interest in new regulatory protection actions at state and federal levels. Industry has committed to working with legislators, regulators, and stakeholders to develop risk-based standards that protect human health and the environment. The EPA has published Advance notice of proposed rulemaking (ANPRM) seeking public input as EPA considers proposing a future rule on adding certain PFAS to the list of toxic chemicals subject to reporting under Section 313 of the Emergency Planning and Community Right-

to-Know Act (EPCRA). The comment deadline will close 60-days following its publication in the Federal Register. FPA intends to coordinate its comments with a coalition of industry trade associations. The federal efforts to regulate PFAS in the water supply across the United States was stripped from the must-pass National Defense Authorization Act (NDAA) at the last minute as some lawmakers were uncomfortable with addressing the issue beyond the military. However, many of the fights that doomed PFAS provisions in the NDAA are likely to resurface in January 2020 as House Majority Leader Steny Hoyer (D-MD) has promised to bring the bill to the floor. There seems general agreement for developing a stand-alone bill that has bipartisan support.

### OSHA Log Out-Tag Out (LOTO) Standard

The Occupational Safety and Health Administration (OSHA) proposed a “de-regulatory” action relating to the Log Out-Tag Out (LOTO) standard. Being the fourth most cited violation on OSHA’s list, it is of significant interest to FPA members. FPA joined an industry coalition (Coalition for Workplace Safety or CWS) and provided comments agreeing with the Agency’s desire to modernize the LOTO standard. Arguing that the standard is outdated and has not kept pace with technological advancements, FPA submitted that control circuit devices have been significantly improved and are a reliable engineering

control for the unexpected release of hazardous energy (to date the standard has required the use of energy isolating devices and defined it to exclude push buttons). The acceptance of control circuit devices will provide employers with the flexibility to capitalize on technological advancements, allowing them to keep their workers safe while reducing burdens and inefficiencies caused by machine down time and maintenance. All indications are that OSHA is leaning toward the industry position. FPA will continue to monitor and share developments with member companies.



Representative Sharice Davids, 3rd District Kansas, visits Plastic Packaging Technologies, LLC

# SUSTAINABILITY

The demand for package recyclability (circular economy) at the end-of-life continues to gain ground with consumers, NGOs, Consumer Products Companies (CPGs), and legislators. This is a concern in that multi-material laminate flexible packaging cannot be easily mechanically recycled at this time, although there are options for end-of-life management, including conversion to energy feedstock, fuel, and syngas. Unfortunately, this option is falsely termed as incineration by environmentalists causing a negative view of the processes.

## Hefty® EnergyBag® Program

FPA sponsored a community level pilot, known as the Hefty® EnergyBag® Program, in Citrus Heights, CA, to prove WTE is a viable option for managing flexible packaging solid waste. Its success has led to pilots in other parts of the country including Boise, Idaho, and the most recent in Cobb County, Georgia. FPA

sponsored the Cobb County (Atlanta area) project as well, which in 10 months has diverted more than 33.6 tons of materials that would have otherwise gone to the landfill. In November this year, the project expanded to engage another 15,000 households, making the program available to new communities with additional haulers throughout Cobb County.



Hefty® EnergyBag® Program Launches in Cobb County, Atlanta



## Materials Recovery for the Future (MRFF)

For years, FPA has been an active partner in the industry sponsored multi-year research project, Materials Recovery for the Future (MRFF). MRFF is an ambitious multi-year, multi-phase project with a vision: “Flexible Packaging is recycled curbside, and the recovery community captures value from it.” Phase 1 and 2 of the project have been completed and in the 3rd quarter of 2019, phase 3 began.

In the first large-scale community pilot, MRFF entered into a partnership agreement with TotalRecycle Material Recovery Facility (MRF) located in Birdsboro, PA (Philadelphia area) to demonstrate the feasibility of recovering household flexible plastic packaging (FPP) from a municipal single-stream recycling program. Van Dyke Recycling Solutions is the equipment partner for the pilot project.

Investigating end markets for sorted FPP is part of the project, as this is the largest risk to success of the project. Using the sorted FPP in building products and asphalt road surfacing are being considered as potential end markets.



J.P. Mascaro & Sons opens TotalRecycle, Inc. in Birdsboro, Pennsylvania

## Advanced Packaging Recycling Project

FPA is a sponsor of the Advanced Packaging Recycling Project out of the University of Florida's IFAS extension program, which is an industry consortium consisting of packaging and waste handling industries. The mission of the project commits



to transforming the waste collection and recycling infrastructure using waste-to-syngas technologies capable of accepting all packaging waste without sorting, and converting waste into versatile chemical feedstock from which new, valuable products may be produced. The initiative sets out to establish an academic center at the University of Florida, a land grant university, through which it expects to outreach to other university communities across the country and promote investment in advanced recycling infrastructure.

# STERILIZATION PACKAGING MANUFACTURERS COUNCIL

Established in 1994, the Sterilization Packaging Manufacturers Council (SPMC) is a council of the FPA. Focused on the sterile packaging of medical devices and pharmaceuticals, the group develops guidance documents and test methods in collaboration with other standards setting organizations such as ASTM International and AAMI. The SPMC Executive Committee convenes two times a year to review SPMC's work and set the direction and priorities for the coming year. Highlights of SPMC activities include:

## Updated Mission Statement

### SPMC Mission

SPMC is a consortium of like-minded companies committed to patient protection by providing sterilization packaging for life-saving medical devices and pharmaceuticals. The SPMC collaborates with our supply chain partners and regulators to provide guidance regarding product requirements, clarity in test methodology, development of standards, and user education. SPMC members use their wealth of experience for the betterment of all.

### Technical Committee Mission

The Technical Committee develops and maintains standards for sterilization packaging, monitors the regulatory environment, and provides input on evolving regulations, provides guidance to the supply chain, and addresses appropriate technical concerns of common interest to our membership.

### Marketing Committee Mission

SPMC's Marketing Committee seeks to elevate the organization's visibility and mission as the sterilization packaging industry's bellwether for guidance on standards, test methodology, and requirements. The Marketing Committee aims to increase engagement with the healthcare industry by communicating the SPMC mission of patient protection through collaboration, promoting the SPMC Technical Committee's role as an educational resource, identifying opportunities for improving industry knowledge; and promoting the SPMC through social media, website traffic, and industry events.



## SPMC Learning Tools: A Guide to Gels and Sterile Barrier Integrity Measures Webinar

The Technical Committee held a webinar on September 11, 2019, titled "SPMC Learning Tools: A Guide to Gels and Sterile Barrier Integrity Measures." This one-hour webinar, hosted by UBM (*Packaging Digest*), was attended by 98 registrants followed by 25 on-demand attendees. The webinar recording is available to FPA members for one year.

## SPMC Launches New Website

The updated SPMC website is now live. The emphasis of the redesigned website is on delivering web content that is database-driven and has an excellent searchability feature. The website's section on Frequently Asked Questions and white papers has consistently been a key driver to the SPMC site, [sterilizationpackaging.org](http://sterilizationpackaging.org). In addition to the new website, the Marketing Committee has undertaken a social media campaign that will start with LinkedIn, to better communicate the expertise and knowledge of the SPMC Committee to the supply chain.



© 2019 Willow® Pump Leak-Proof Pouch  
Gold — Technical Innovation  
Silver — Expanding the Use of Flexible Packaging  
Manufacturer: Vonco Products, LLC



© 2018 Autobahn™ Tear-Open Flow Wrap  
Gold Award - Technical Innovation  
PAXUS, Inc. (formerly Rollprint Packaging Products, Inc.)

# PROMOTION

Promoting the benefits of flexible packaging and FPA members is a core pillar of the Association's work. This year, FPA leveraged the 2018 Sustainability Research Study and 2018 Sustainability Report, *A Holistic View of the Role of Flexible Packaging in a Sustainable World*, to provide members with fact sheets, eBooks, infographics, and social media macros. These resources provide members with marketing and communication tools for use with their customers and provides FPA with additional tools to speak with policy makers and the supply chain. This year, FPA also greatly enhanced its social media presence to amplify industry-related news and trends, as well as launch its consumer brand, Perfect Packaging. FPA expanded from Twitter to now include, Facebook, Instagram, and LinkedIn. This new social media presence leverages the promotional material the FPA generates to inform, educate, and build a receptive, qualified audience to promote the positive benefits of flexible packaging. As always, the Annual Flexible Packaging Achievement Awards competition once again honored the latest advancements in innovation and technology and showcased industry-leading work by many of FPA's members – 2019 was our 63rd year for the competition.

## Leveraging Results from the 2018 Sustainability Research Study and 2018 Sustainability Report, *A Holistic View of the Role of Flexible Packaging in a Sustainable World*

Using results derived from the published 2018 Sustainability Report, *A Holistic View of the Role of Flexible Packaging in a Sustainable World*, FPA developed fact sheets, social media macros, and GIFs to distribute the report data in a visually appealing format. Six case studies show the sustainability of flexible packaging when compared to other packaging types for the same product including coffee, baby food, cat litter, juice pouches, laundry detergent pods, and motor oil.

Results from the 2018 Sustainability Research Study revealed qualitative and quantitative data analyzing brand owner and consumer perceptions of the sustainability benefits of flexible packaging were also transformed into a research report and eBook, as well as infographics and social media macros.

These resources have been posted on the FPA websites, [flexpack.org](http://flexpack.org) and [perfectpackaging.org](http://perfectpackaging.org), and serve as continued social media content.





# FPA Flexible Packaging Association

Connecting. Advancing. Leading.



## Cat Litter Flexible Packaging Benefits

**FOSSIL FUEL CONSUMPTION**  
The rigid PET container has a fossil fuel usage nearly 50% greater than that of the flexible stand-up pouch with zipper, and the package weight is 60% heavier.

76%  
46%

**WATER CONSUMPTION**  
The rigid PET container's water footprint is 400% larger than the flexible stand-up pouch.

400%

**GREENHOUSE GAS EMISSIONS**  
The rigid HDPE bottle has a greenhouse gas emission about 1.5x that of the flexible stand-up pouch with zipper. Even though rigid HDPE bottles are recycled at a rate of 34.2%, as much material still ends up in the municipal solid waste in landfills compared to 5% for the flexible stand-up pouch.

1.5x  
34.2%  
5%

**RECOVERY BENEFITS**  
In order for the PET container to have the same level of municipal solid waste as the flexible stand-up pouch, the recycling rate of both the rigid PET container and cap would need to increase from 40% to more than 90%.

1x  
4x

**RECOVERY BENEFITS**  
Recovering the flexible stand-up pouch is not recycled, it still results in a considerably lower amount of material ending up as municipal solid waste versus a rigid HDPE bottle.

1x  
4x

**WATER CONSUMPTION**  
The water consumption impact of the glass jar is 1,200% more than that of the flexible stand-up pouch.

1,200%

# PROMOTION

## FPA Expands Social Media Program

In May 2019, FPA took steps to enhance their social media program to amplify industry-related news and trends, as well as launch their consumer brand, Perfect Packaging, on Facebook and Instagram to promote the positive benefits of flexible packaging. To strengthen our social initiatives, a Social Media Marketing Guide was developed to define FPA's objectives, target audiences, tone and voice, content categories, and overall growth strategies for all platforms.



**FPA** Flexible Packaging Association  
Connecting. Advancing. Leading.

### SUSTAINABILITY OUTREACH AND CONSUMER CONVERSATIONS

FPA Flexible Packaging Brand Owner and Consumer Sustainability Study



## FLEXIBLE PACKAGING

A Case for Elevating Sustainability Conversations

**AMPLIFY COMMUNICATIONS ABOUT SPECIFIC BENEFICIAL LIFECYCLE IMPACTS**

Consumers are already talking about sustainability, but there's still an opportunity to inject specific sustainable manufacturing processes and supply chain concepts into the conversation. That's where brand owners come in.

Although consumers are most likely to associate sustainability with familiar terms like **recycling** (88%) and **renewable** (82%), they also recognize the importance of business-to-business (B2B) terms like **transportation efficiency** (84%) and **energy efficiency** (83%) when prompted with them.

**24%** of consumers say transportation efficiency contributes sustainability.

**CONNECT WITH CONSUMERS FOR MORE FUTURE BUYING OPPORTUNITIES**

The beneficial lifecycle impacts and sustainability advantages of flexible packaging are more likely to resonate with consumers ages 18-44, who represent the next wave of buying power in the U.S. Brand owners who promote these messages can take advantage of the opportunity.

Younger generations are more likely than members of older generations to believe flexible packaging is sustainable.

Age Group	Flexible Packaging	Glass Packaging
ages 18-44	43%	31%
ages 45+	51%	31%

...and less likely than older generations.

**71%** of consumers ages 18-34 care about the sustainability aspects of packaging.

**83%** of consumers say they understand the meaning of sustainability.

**86%** of consumers care about sustainability in general.

**84%** of consumers prefer products that are sustainable.

**79%** of consumers actively seek out products in sustainable packaging.

## BUYING INTO SUSTAINABILITY

Consumers are showing their appreciation of sustainable packaging at the checkout counter.

**CONSCIOUS CONSUMERS**

**83%** of consumers say they understand the meaning of sustainability.

**65%** of consumers think sustainability is at least a very important attribute of packaging for products used both in-store and online.

**86%** of consumers care about sustainability in general.

**SUSTAINABLE PACKAGING MATTERS**

**82%** of consumers say they care about the sustainability aspects of packaging.

**79%** of consumers say they prefer products that are in sustainable packaging over ones that are not.

**72%** of consumers say they trust labels that include sustainability benefits on product packaging.

**Younger generations are more likely to believe that flexible packaging is sustainable.**

Age Group	Believe flexible packaging is sustainable
ages 18-34	42%
ages 35-44	46%
ages 45-54	37%
ages 55-64	31%
ages 65+	27%

This belief among younger consumers opens the door to...

**THE MILLENNIAL OPPORTUNITY**

Millennials say it's extremely important or absolutely essential that product packaging...

Millennial Behavior	Percentage
has a sustainable lifestyle	33%
is manufactured with less energy	33%
has been transported efficiently	32%

Millennials say they always or often...

Millennial Behavior	Percentage
actively seek out products in sustainable packaging	36%
promote the benefits of sustainable packaging to others	37%
check packaging labels for sustainability information	37%

**FPA** Flexible Packaging Association  
www.frapack.org

© 2019 Flexible Packaging Association. All rights reserved. For more information about flexible packaging and this study, visit [www.frapack.org](http://www.frapack.org).

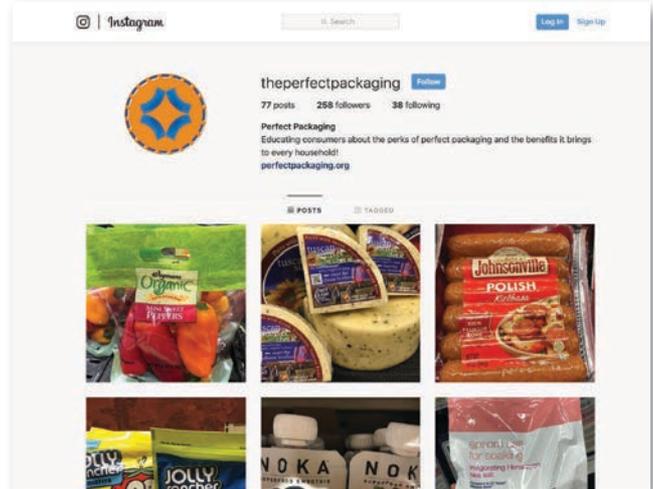
## Overall goals and objectives include:

- Developing and engaging a consumer and business following on social networks to inform, educate, and to build up a receptive, qualified audience in case of a need for crisis communications.
- Leveraging existing tools and resources to build a greater understanding of flexible packaging benefits, convenience, and reduction of food waste.
- Educating about sustainable issues: flexible packaging creates less environmental impact and the industry is working hard to improve end-of-life management options.

Within the first six months of launching our consumer outreach, we've reached 10,684 fans on Facebook and 216 followers on Instagram. All metrics are steadily increasing (impressions, engagement, and followers) indicating that content is strong and holding the attention of the audience. Early observations indicate that Facebook engagement remains generally neutral with our audience being more receptive to the convenient features of flexible packaging. Contrary to Facebook, the Instagram audience is focused on the negative attributes of plastics in general and the non-recyclability of the packaging.

## FPA Magnifies Industry Communications

FPA actively serves as a thought leader for the Association and the flexible packaging industry. In addition to FPA's regular contributions to the official industry publication, *Flexible Packaging* magazine, they added recurring columns in *Paper, Film & Film CONVERTER (PFFC)* "FPA Forum" and in *Packaging Strategies* "FPA Column" to discuss association activities, initiatives, and accomplishments. FPA also launched its LinkedIn page.



# PROMOTION

## Flexible Packaging Achievement Awards Competition

The Flexible Packaging Association (FPA) announced the winners of its 63rd Annual Flexible Packaging Achievement Awards Competition. The winning entries were recognized during the FPA Welcome Dinner and Flexible Packaging Achievement Awards Ceremony held Wednesday, March 6, 2019, in conjunction with the 2019 FPA Annual Meeting (March 6-8) at the Scottsdale Resort at McCormick Ranch, Scottsdale, Arizona.

This year, 54 packages were submitted in the competition, for a total of 140 entries (some packages were entered into multiple categories). Fourteen packages were honored with 26 Achievement Awards in various categories.

The judges for this year's competition included Cory Francer, Senior Editor, *packagePRINTING* magazine; Robert Kimmel, Sc.D., Associate Professor and Director, Clemson University Center for Flexible Packaging, Clemson University; and David Luttenberger, Global Packaging Director, Mintel Group Ltd.

Sustainability continues to be a focus, with a number of entries using bio-based and compostable materials. But, most significantly, we saw several excellent examples of the conversion of multilayer films, which have previously been diverse materials, into materials which will be recyclable in the existing recycle streams, particularly the polyethylene stream.

Multisensory elements incorporated into flexible packaging was a growing trend seen in this year's competition, as well as industry collaboration on packaging.

Several of the entries also highlighted the transition of products previously packaged in rigid containers to flexible packaging, and addressed consumer convenience, making it easier for the consumers to shop, transport, dispense from, and use flexible packaging.

## Highest Achievement Award

### Molson Coors – 12 Pack Cooler Bag

Gold – Expanding the Use of Flexible Packaging

Gold – Printing & Shelf Impact

Silver – Packaging Excellence

Manufacturer: Bemis Company, Inc.



## Gold Achievement Awards

### Harney & Sons Master Tea Blenders Pouch

Gold – Sustainability

Gold – Packaging Excellence

Silver – Technical Innovation

Manufacturer: TC Transcontinental Packaging



### Nutro Ultra Grain Free

Gold – Printing & Shelf Impact

Manufacturer: Plastic Packaging Technologies, LLC



### **Willow® Pump Leak-Proof Pouch**

Gold – Technical Innovation

Silver – Expanding the Use of Flexible Packaging

Silver – Packaging Excellence

Manufacturer: Vonco Products, LLC

### **Silver Achievement Awards**

#### **AMSOIL® Easy-Pack**

Silver – Printing & Shelf Impact

Manufacturer: AMSOIL INC.



#### **Bar-Asept**

Silver – Technical Innovation

Manufacturer: Liqui-Box Corporation

#### **Before Brands SpoonfulOne Strawberry Puffs**

Silver – Printing & Shelf Impact

Manufacturer: CL&D Graphics, Inc.

#### **ConAgra Slim Jim Premium Smoked Sticks**

Silver – Printing & Shelf Impact

Silver – Packaging Excellence

Manufacturer: Bemis Company, Inc.

#### **Dole Crafted Smoothies**

Silver – Sustainability

Manufacturer: Emerald Packaging, Inc.

#### **FLEXMAX™ Packaging for**

#### **Floor Care Products from Midlab®**

Silver – Expanding the Use of Flexible Packaging

Manufacturer: Printpack

### **Green Giant Veggie Spirals™**

#### **PrimaPak® Package**

Silver – Expanding

the Use of Flexible

Packaging

Silver – Technical

Innovation

Silver – Packaging

Excellence

Manufacturer:

Sonoco Flexible Packaging



#### **JBS-Swift Printed**

#### **Ovenable Meat**

#### **Packaging (OvenRite®)**

Silver – Technical

Innovation

Manufacturer: Bemis

Company, Inc.



#### **A Sensational Pouch**

Silver – Technical Innovation

Silver – Printing & Shelf Impact

Silver – Packaging Excellence

Manufacturer: St. Johns Packaging Ltd.

#### **Sustainable Pouch with Easy-Lock (APLIX)**

#### **Reclosable Feature**

Silver – Sustainability

Manufacturer: St. Johns Packaging Ltd.



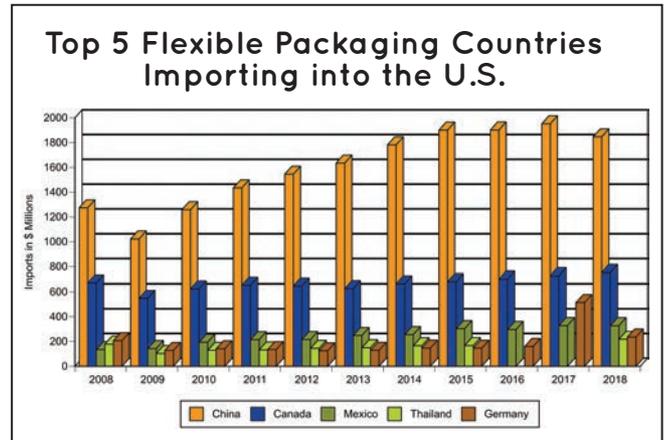
# INDUSTRY DATA

The U.S. flexible packaging industry is projected at \$31.8 billion in annual sales based on FPA's *State of the Industry Report* for 2019. 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.

Flexible packaging represents approximately 19% of the total \$170 billion U.S. packaging industry and is the second largest packaging segment behind corrugated paper, and just ahead of bottles and miscellaneous rigid plastics packaging. Flexible packaging's solid long-term strength coupled with flexibles' ability to replace other packaging formats has resulted in the growth of flexible packaging, increasing from 17% in 2000 to the current level of 19% in 2018.

FPA's data and reports enable members to benchmark their performance in the industry and gain helpful insight to assist them in growing their business.

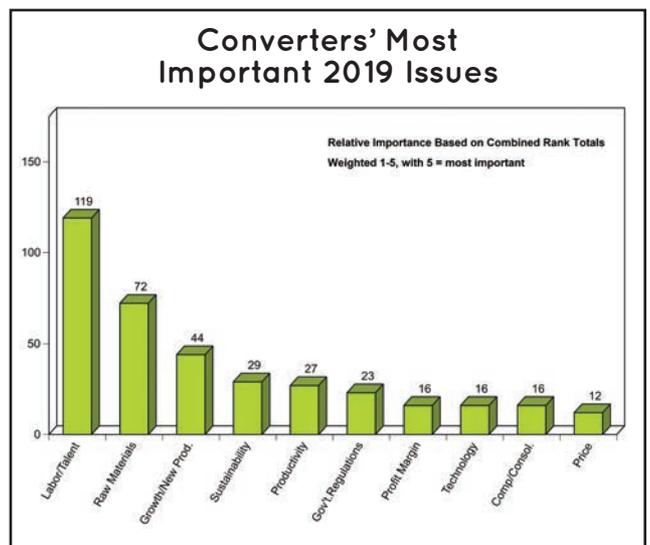
FPA maintains industry statistics and updates reports as data changes. Thus, continued dialog with the U.S. Census Bureau, including reviewing data releases in connection with the Census Bureau's Annual Survey of Manufactures (ASM), and evaluating detailed long-term consistency by FPA is ongoing.



Source: Census Bureau, Foreign Trade Division Calculations by the Flexible Packaging Association

## State of the Flexible Packaging Industry Report (SOI)

The annual *State of the Flexible Packaging Industry Report* 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



Note: Converter data is a composite of member and nonmember data. Relative importance based on combined rank totals weighted 1-5, with 5 = most important  
Source: FPA 2018 *State of the Industry Survey* and *Converter Industry-Wide Survey*

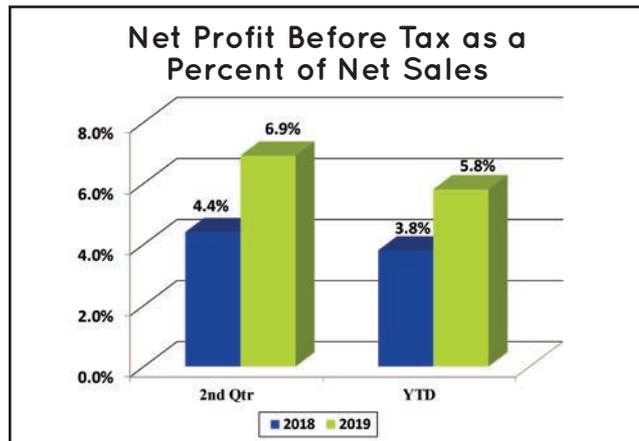
trends; capital spending plans; industry M&A activity; projected growth areas; U.S. imports and exports, and end-use application information. The 2019 SOI is the 28th year FPA has produced an annual SOI report. The 2019 report was distributed to members via email with a link to the document/pdf in late August.

### 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. The latest *Pulse Report* for second quarter 2019 survey results for “all companies” indicate approximately 38% of the participating companies had higher profit in second quarter 2019 vs. second quarter 2018, while 59% had lower profit, and 3% were at the same sales levels.

### Earnings Report

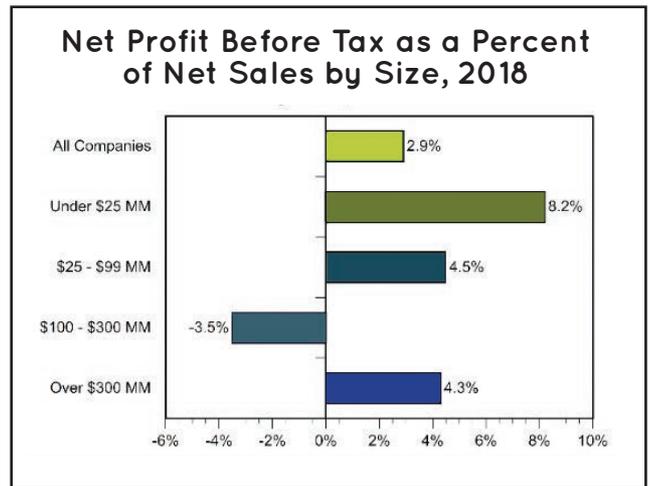
Published semi-annually, the *Earnings Report* includes expense and manufacturing cost information with a primary emphasis on sales, expenses, asset productivity, and profitability performance with year-on-year, as well as second or fourth quarter comparisons. According to the *Second Quarter 2019 Earnings Report*, net profit before tax for all reporting companies increased to a profit of 6.9%, higher than the level of 4.4% for the same period in 2018. The report is only available to FPA converter members who participate in the corresponding survey.



Quarterly data is from Schedule A, including all companies (film extrusion, single web, multiweb and bag manufacturing).

### Operating Cost/Ratios Report

The annual *Operating Ratios Report* provides information on 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. In the *2018 Operating Ratios Report*, the most recent report available, companies with sales of less than \$25 million posted the highest net profit before tax as a percent of 2018 net sales at 8.2%, significantly higher than composite results for all companies of 2.9% for 2018. The report is only available to FPA converter members who participate in the corresponding survey.



# INDUSTRY DATA

## Flexible Packaging Industry Compensation Report

The annual *Compensation Report* provides information on flexible packaging industry salary levels and hourly rates by company/plant size, region, and primary manufacturing operations. Information contained in the report is comprehensive – some examples of the information reported are information such as the average percent increases in compensation as well as expected next year compensation for salaried employees and hourly workers; health and wellness benefits given to employees; average salary and hourly wages for numerous headquarter and plant positions; commission formulas for sales representatives; and price differentials between union and non-union plants – just to name a few. The report is only available to FPA converter members who participate in the corresponding survey.

## FPA/IHS Markit Polyolefin Market Reports

The bi-annual FPA/IHS *Market Reports* examines key issues expected to influence the cost and availability of flexible packaging materials, most notably polyethylene and polypropylene. IHS Markit presents the updates at FPA's Annual Meeting and Fall Executive Conference and prepares the reports following the presentations. Starting in 2018 and continuing this year, IHS also conducts webinars on other resins used by the industry, exclusively for FPA members.



## Polyethylene

Global demand growth for polyethylene (PE) slowed down in 2019, with the China market weakened by the trade war and 2.9 MMT of U.S. capacity additions in 2019 pressuring the market. In addition, sustainability issues appear to be dampening PE growth as embracing a sustainable product line in order to make global environmental commitments may mean material substitution away from PE. There is no doubt that while sustainability has been on the industry radar for some time – it has taken a quantum leap in terms of significance in the last year or two and is now a top agenda item in board meetings for participants representing all aspects of the supply chain. Its significance cannot be overstated as it has wide-ranging implications for PE, including bags bans and restriction on single-use plastics and packaging through legislation, potential extended producer responsibility fees, company self-imposed plastic deselection, and increased demand for post-consumer recycled content.

## Polypropylene

Last year's polypropylene (PP) report focused on how strong polypropylene markets looked due to insufficient supply and too much demand and the concern was whether polypropylene pricing would have to elevate and destroy demand. In 2019, this is no longer the case. The trade war and its impact on global economies results in declining GDP, which in-turn hurts demand. Also, PP resin buyers purchase bare minimum volumes in times of economic uncertainty, so they can focus on working capital (keeping inventory low). Also, the global automotive industry was not as robust in 2018, and since approximately 10% of global PP demand goes into the auto industry, an industry slowdown hurts PP demand. For 2019, PP margins in all regions are now on a downward trend with North America and Western Europe trying to hold on to margins before the upcoming 2020 PP oversupply hits the market.

### FPA/IHS Markit Webinar on Metallocene LLDPE, February 21, 2019

FPA and IHS Markit partnered to provide an overview of the metallocene LLDPE industry. Agenda topics included: an introduction on single-site/metallocene LLDPE after two decades in the market; the global overview of capacity and demand from 2015 through 2025; a metallocene LLDPE capacity and demand snapshot by key region; position of mLLDPE in the larger LLDPE market; and a North American focus on leading mLLDPE producers and planned new capacity, key applications and demand drivers, and a price forecast for 2018-2025. The webinar was only available for FPA members, and there were 37 registrants.

### FPA/IHS Markit Webinar on EVA Copolymers, June 20, 2019

FPA and IHS Markit partnered to provide an overview of EVA copolymers. Agenda topics included: an overview of ethylene copolymers; an introduction to EVA copolymers including definitions and properties; applications by percent vinyl acetate (VA) content; and a review of key applications. The webinar discussed: global EVA demand as part of total LDPE demand; EVA demand global and key regions (N. America, Europe, NE Asia, and SE Asia); EVA capacity overview (world capacity by region, new planned EVA capacity, and leading global EVA producers); global EVA supply/demand balance; and global EVA trade by country. The webinar was only available for FPA members, and there were 28 registrants.

### Global Trends in Flexible Packaging, Euromonitor International

FPA contracted with Euromonitor International to provide further market data and information for 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 *State of the Industry Report*. FPA used Euromonitor's International Passport Database, which is based on the number of package units (volume) sold to consumers through all retail channels to pull data from the database including total U.S. packaging by package type, breakdown of flexible packaging by category, and market applications. The exported data is used to calculate multi-period growth rates and identify trends. This year, FPA added regional data to its portfolio. Also, 2019 saw two updates to data in its Market Tracker tool ([www.flexpack.org/market-tracker](http://www.flexpack.org/market-tracker)), which tracks and compares flexible packaging data throughout the world. In addition to a big picture overview, it tracks the 5 major industry segments: beverages; dog and cat food; beauty and personal care; home care; and packaged food.



# NETWORKING

## FPA Annual Meeting

Held each spring, the FPA Annual Meeting is a two-day conference that offers education and networking opportunities for industry leaders and senior management. The content-rich agenda focuses on industry-specific issues including challenges and opportunities, while also allowing time for networking through a golf tournament and other activities. The meeting also hosts FPA's annual dinner and banquet recognizing the year's Flexible Packaging Achievement Award Competition winners.

The agenda has annual reports, including the *State of the Flexible Packaging Industry Report* by FPA's Chairman of the Board of Directors; an update on the European flexible packaging industry from Flexible Packaging Europe; and a presentation on the polyethylene market by IHS Markit.

This year's meeting featured engaging guest speakers covering motivational and economic issues. This included Tammie Jo Shults, Captain of Southwest Flight 1380 and a member of the U.S. Navy's first female class of F-18 hornet fighter pilots. During her presentation, audiences

heard powerful flight-deck recordings between Shults and air-traffic control chronicling the chilling moments when, a short time after takeoff, at just over 30,000 feet, the plane's left engine exploded, instantly causing multiple system failures and plunging the airliner more than 18,000 feet in the first five minutes alone. Years of extensive training as a United States Navy aviator kicked in. Shults and her co-pilot safely rerouted the crippled Boeing 737 to Philadelphia, saving 148 lives including passengers and crew. Her presentation offered lessons in leadership, service through sacrifice, and the value of human life.

Speaker, Alex Chausovsky, a highly experienced market researcher and analyst, provided meeting attendees with insights into macroeconomic trends, discussed leading indicators for "seeing" the future, provided a look at the impacts of tax reform, provided an overview on tariffs and trade; and discussed industry drivers.

The group heard from a panel on marine debris and current and future solutions that was moderated by John



Nick Vafiadis at the FPA Annual Meeting



Tammie Jo Shults at the FPA Annual Meeting



The Annual Meeting Networking Reception



Attendees during the Annual Meeting Welcome Reception



Attendees during the Welcome & Achievement Awards Dinner



Dr. Bruce Welt at the FPA Fall Executive Conference



Ben Nemtin at the FPA Fall Executive Conference



Josh Linkner at the FPA Fall Executive Conference

Kalkowski, Conference Program/Editorial Projects Director, BNP Media Packaging Group. Panelist included: William Jackson, VP & CTO, Bemis Company, Inc., who discussed recycling as a part of the solution for marine debris; Adrienne Tipton, VP of New Product Development, Novolex, who provided an overview on compostability; and Bob Lilienfeld, Vice President, Marketing & Sustainability, BioLogiQ, Inc., who discussed avoiding the biodegradation minefield.

Meeting attendees also heard from Tom Blaige, Chairman and CEO, Blaige and Company who provided an update on industry consolidation.

### FPA Fall Executive Conference

Held in the fall, this one-day conference provides insights into current trends in the industry and across the supply chain, with networking receptions for senior industry leaders. The agenda for the 2019 conference included Andy Hackman, Principal Lobbyist, Serlin Haley and FPA State Lobbyist, who provided an update on state government affairs; Bruce Welt, Ph.D., Professor, University of Florida provided an overview on the University of Florida's IFAS' Advanced Packaging

Recycling Project; Joel Morales, Jr., Senior Director, Polyolefins Americas, IHS Markit, who provided an update on the polypropylene market; Steve Rice, Director of Business Consulting, EFI, who spoke about managing incentives for employees; and Bill Carroll, Senior Consultant, Euromonitor International, who provided insights on global trends for flexible packaging.

Conference attendees also featured two guest speakers: Ben Nemtin, a member of MTV's Hit Show, *The Buried Life*, a New York Times bestselling author, and recently named one of the 2019 World's Top 30 Organizational Culture Professionals by Global Gurus; and Josh Linkner, a world-renowned innovation expert, 5-time tech entrepreneur, and *New York Times* bestselling author.



Attendees at the FPA Fall Executive Conference



Attendees at the Fall Executive Conference

# LEADERSHIP

## Officers & Executive Committee

**Curt Begle**  
Berry Global  
Chairman of the Board

**David Staker**  
Plastic Packaging Technologies, LLC  
Past Chairman of the Board

**Guenther Hering**  
Henkel Corporation  
Treasurer

**Alison Keane, Esq.**  
Flexible Packaging Association  
President & CEO and Secretary

**Stan Bikulege**  
NOVOLEX™  
Executive Committee Member at Large

**Kathy Bolhaus**  
Charter NEX Films, Inc.  
Executive Committee Member at Large

**Russell Grissett**  
Sonoco Flexible Packaging  
Executive Committee Member at Large

**Bill Jackson**  
Amcor Flexibles  
Executive Committee Member at Large

**David Love**  
Printpack  
Executive Committee Member at Large

---

## Board of Directors

**Doug Aldred**  
Flint Group

**Todd Becker**  
NOVA Chemicals, Inc.

**Jarred Carter**  
Siegwerk USA Co.

**Sachin Deasi**  
ProAmpac

**Tricia DeLaney**  
ExxonMobil Chemical Company

**Dhuanne Dodrill**  
PAXXUS, Inc.



From left to right: **Chris Parrilli**, Sun Chemical Corporation and **Alex Richert**, CleanPlanet Chemical, Inc.



From left to right: **Fredy Steng**, Berry Global and **Guenther Hering**, Henkel Corporation

## Board of Directors

**Ken Fontaine**  
AMGRAPH Packaging, Inc.

**Mark Forman**  
Belmark inc.

**Steve Garland**  
Sealed Air Corporation

**Kevin Kelly**  
Emerald Packaging, Inc.

**Erik Keracik**  
Westlake Chemical Corporation

**Jeff Koch**  
American Packaging Corporation

**Landon Luttrell**  
The Dow Chemical Company

**Tom Mason**  
Constantia Flexibles LLC

**Joe Moynihan**  
Mondi Jackson LLC

**Francois Olivier**  
TC Transcontinental Packaging

**Chris Parrilli**  
Sun Chemical Corporation

**Stephen Perkins**  
Bryce Corporation

**Geoff Peters**  
Wikoff Color Corporation

**Ken Swanson**  
Liqui-Box Corporation

**Andrew Wheeler**  
Windmoeller & Hoelscher Corporation

## 2019 Chairman's Advisory Council

**Eric Erickson**  
Kendall Packaging Corporation

**Marc Leclair**  
St. Johns Packaging, Ltd.

**Dave Nunes**  
Hosokawa Alpine American

**Madeleine Robinson**  
LPS Industries, LLC

**Fredy Steng**  
Berry Global

**Chris Thomazin**  
Polymer Packaging Inc.



From left to right: **David Staker**, Plastic Packaging Technologies, LLC; **Alison Keane**, Flexible Packaging Association; **Bill Jackson**, Amcor Flexibles; and **Curt Begle**, Berry Global



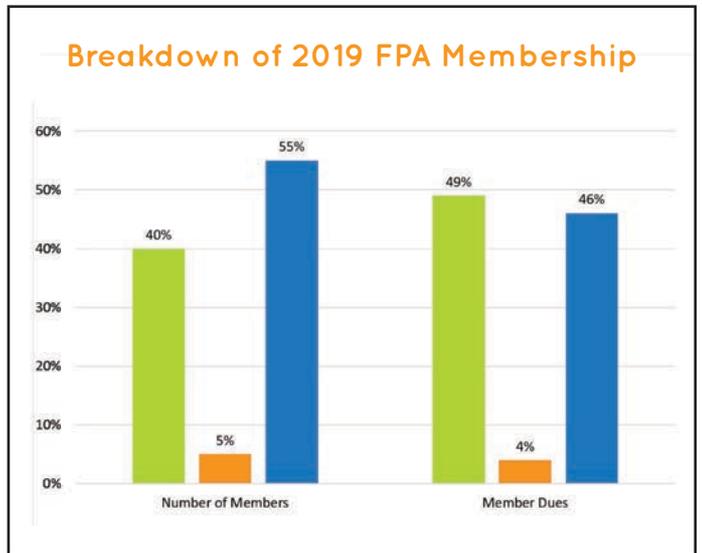
From left to right: **David Black**, Chevron Phillips Chemical Company LP; **Kathy Bolhous**, Charter NEX Films, Inc.; and **Jim Addcox**, Chevron Phillips Chemical Company LP



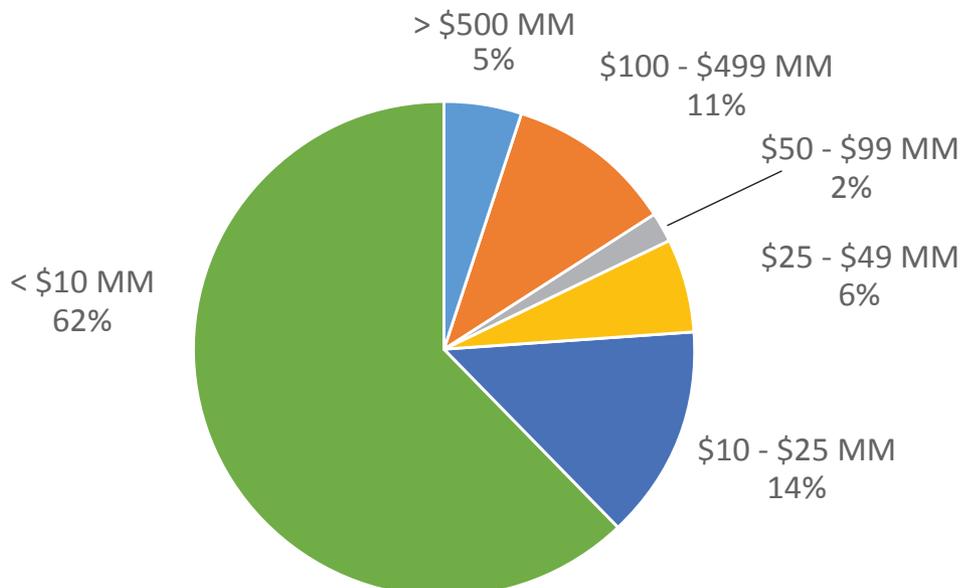
From left to right: **Troy Weyer**, Coim USA, Inc.; **Jeff & Gail Koch**, American Packaging Corporation; and **Brad Williams**, Coim USA, Inc.

# MEMBERSHIP

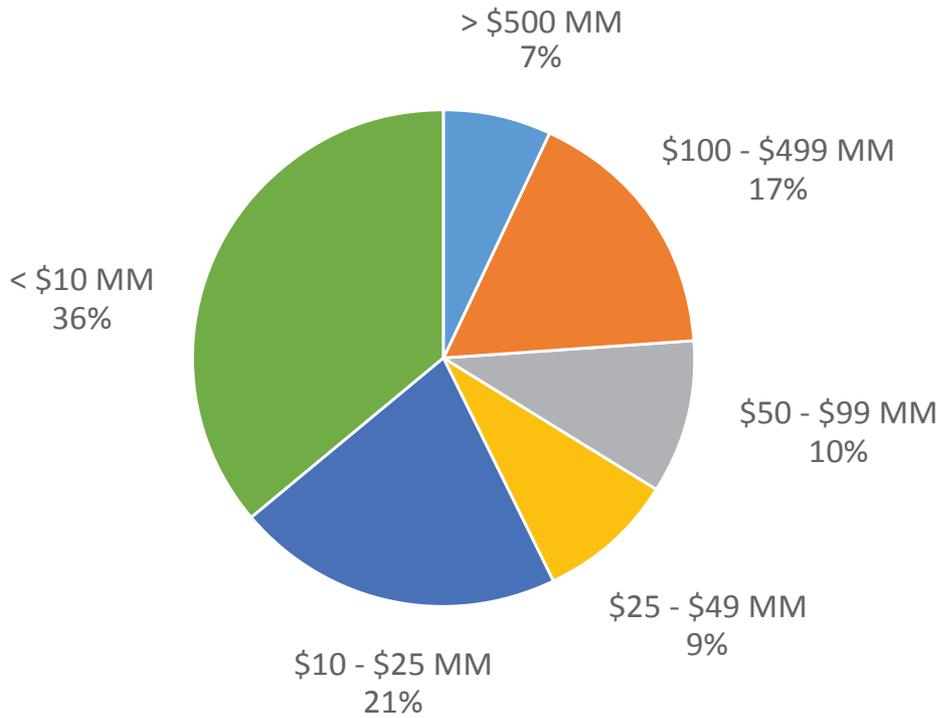
A Board Membership Workgroup met in July 2019 to discuss future plans of how to best retain membership and increase recruitment. Through this workgroup, FPA has embarked on a Board level recruitment effort, where current members are helping to recruit new members. FPA is concentrating on converter members in the short term. FPA also established an Emerging Leadership Council (ELC), which will be a new Committee of young flexible packaging professionals. The Chair and Co-Chair of the Council will sit in on FPA Board meetings and report back on Committee activities, such as workforce recruitment and the benefits of flexible packaging education and outreach. The ELC will help with membership recruitment and retention by getting industry professionals involved with FPA earlier in their careers and establish a line of potential Board members for succession planning.



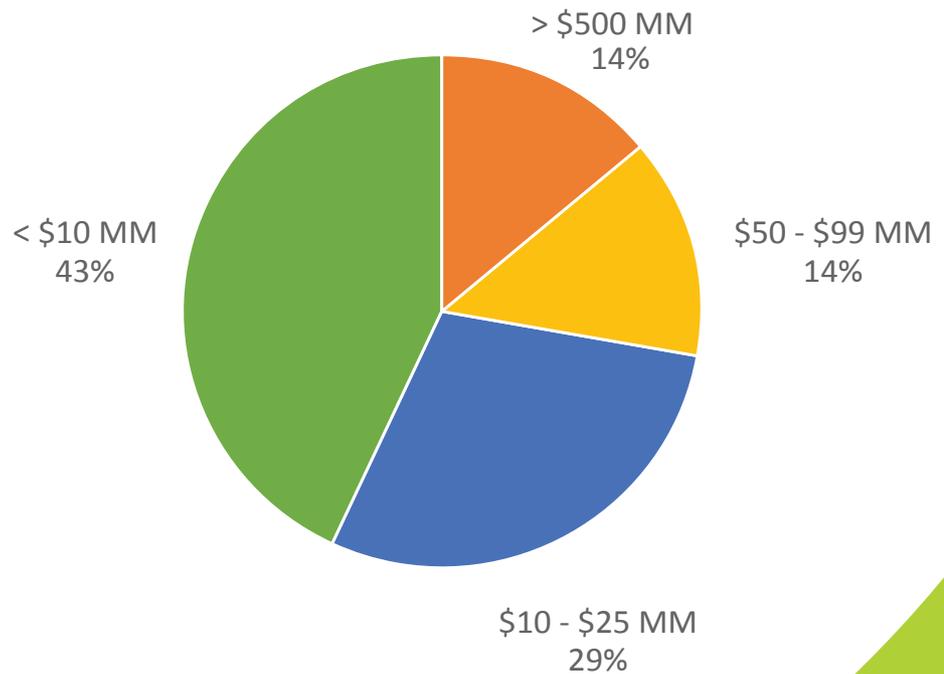
## Member Companies as of October 2019 - 175



### Converter Member Breakdown



### Associate Member Breakdown



# MEMBERSHIP

## 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:

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

## 2019 FPA Membership

### Converter Members

Admiral Packaging, Inc.  
AeroFlexx  
Amcor Flexibles  
American Packaging Corporation  
AMGRAPH Packaging, Inc.  
Atlapac Corporation  
AWT Labels & Packaging  
Beacon Converters, Inc.  
Belmark inc  
Bema Incorporated  
Berry Global  
Bryce Corporation  
Catty Corporation  
Celplast Metallized Products Limited  
CL&D Graphics  
Consolidated Container Company  
Constantia Flexibles LLC  
C-P Flexible Packaging  
Emerald Packaging, Inc.  
ePac - Flexible Packaging  
FILMtech Inc.  
Flex Films (USA) Inc.  
Flexible Pack  
Future PolyTech, Inc.  
Genpak Flexible  
Glenroy, Inc.

Hart Flex Pack  
Hub Labels, Inc.  
Indevco Plastics  
Inland  
Kendall Packaging Corporation  
Label Technology Inc.  
Liqui-Box Corporation  
LPS Industries, LLC  
Max Katz Bag Company, Inc.  
Outlook Group LLC  
NOSCO  
PAC Worldwide Corporation  
PAXXUS, Inc.  
Phenix  
Plastic Packaging Technologies, LLC  
Poly Print, Inc.  
Polymer Packaging Inc.  
PPC Flexible Packaging  
Precision Color Graphics Ltd. & Specialty Packaging Technologies Inc., a wholly owned subsidiary  
Prime Packaging, LLC  
Printpack  
ProAmpac  
Sealed Air Corporation  
Sealstrip Corporation  
Sonoco Flexible Packaging  
Southern Graphic Systems LLC  
St. Johns Packaging Ltd.

Südpack Oak Creek Corporation  
SunFlex Packagers Inc.  
TC Transcontinental Packaging  
Technipaq, Inc.  
Texas Poly, Inc.  
Vonco Products, LLC  
Zacros America, Inc.

#### **International Converter Members**

Emirates Printing Press, L.L.C.  
Markenburg International Foods Corporation  
Paharpur 3P  
Películas Plásticas S.A. de C.V.  
Polykar  
Sanraj Polyprinters

#### **Associate Members**

ACTEGA  
Ampacet Corporation  
Ascend Performance Materials LLC  
Ashland  
B&B Packaging Technologies L.P.  
Bamberger Polymers, Inc.  
BioLogiQ, Inc.  
Bobst North America Inc.  
Bostik, Inc.  
Celanese Corporation  
Charter NEX Films, Inc.

# MEMBERSHIP

## 2019 FPA Membership

### Associate Members continued...

Chevron Phillips Chemical Company LP

Chromatic Technologies, Inc.

CleanPlanet Chemical, Inc.

Cloeren Incorporated

Coim USA, Inc.

Comexi North America, Inc.

Cosmo Films Limited

Davis-Standard, LLC

Dow

Durr MEGTEC, LLC

EFI

Energy Sciences, Inc.

ExxonMobil Chemical Company

Flint Group

Formosa Plastics Corporation, U.S.A.

Fujifilm North America Corporation, Graphic Systems Division

H.B. Fuller

Harper Corporation of America

Henkel Corporation

Hosokawa Alpine American

HQC Inc.

hubergroup

INX International Ink Co.

ISOFlex Packaging

Karlville Development, LLC

Kodak

Koenig & Bauer Flexotecnica

Kuraray

Louisiana Plastic Industries

Lubrizol Advanced Materials

LyondellBasell

MacDermid Graphics Solutions

Mamata Enterprises, Inc.

Mark Andy, Inc.

Mica Corporation

Michelman

Mid South Extrusion

Mitsubishi Polyester Film, Inc.

MJW International

MORCHEM

NDC Technologies

Nordmeccanica, NA

Nordson Corporation - PPS

NOVA Chemicals, Inc.

Paper Converting Machine Company (PCMC)

Plastic Suppliers, Inc.

PolyExpert Inc.

Polyplex USA, LLC

Preco, Inc.

Presto Products Company FRESH-LOCK® Zipper Unit

Reifenhauser Inc.  
RKW North America, Inc.  
SABIC  
Sasol North America  
Ship & Shore Environmental, Inc.  
Siegwerk USA Co.  
Smart Plastic Technologies, LLC  
Sun Chemical Corporation  
Syncro USA  
Terphane LLC  
Toppan USA, Inc.  
Toyo Ink America, LLC  
TOYOBO USA, INC  
Transcendia  
Transplace  
UBE America Inc.  
UTECO North America, Inc.  
Watson Standard  
Westlake Chemical Corporation  
Wikoff Color Corporation  
Windmoeller & Hoelscher Corporation

#### **Academic Members**

California Polytechnic State University  
Clemson University  
Co-Inventa  
Fox Valley Technical College

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  
Rutgers, the State University of New Jersey  
San Jose State University Packaging Program  
University of Central Missouri  
University of Florida  
University of Wisconsin - Stout  
Washington State University  
Western Michigan University

#### **Trade Press Members**

Converting Quarterly  
*Flexible Packaging Magazine*/BNP Media  
Industry Intelligence Inc.  
packagePRINTING  
Packaging Digest  
Packaging World  
Paper, Film & Foil Converter (PFFC)

# WHAT'S TO COME

## Advocacy

FPA will continue to strive for workable legislation with respect to end-of-life management for packaging, particularly flexible packaging. Our dialogue with the Product Stewardship Institute, started in October of this year will continue through the better part of 2020 with the goal of shaping legislation with key concepts FPA and its members can support in any legislation impacting the industry. Even if California or another state passes legislation before the dialogue completes its efforts, the resulting outcome will still inform future states and federal efforts. CRE will be central to the negotiations in California.

While 2020 is an election year, which will make federal efforts even harder, FPA will continue to work with our coalitions to see the USMCA trade agreement ratified and a new China deal put in place, in order to eliminate the costly tariffs and retaliatory tariffs that are currently on our materials and goods. We will also continue to move the RECOVER Act forward to ensure better recovery and recycling infrastructure for our products in the future.

## Sustainability

Ongoing work with our partners on the MRFF and Hefty® EnergyBag® program will be supported again in 2020, in addition to our new partners at the University of Florida Center for Advanced Packaging Recycling. FPA will also publish a new report detailing life-cycle environmental analyses of flexible packaging versus alternative packaging types for the e-commerce market, along with all the requisite factsheets, infographics, and brochures for FPA and members to utilize in the marketing of flexibles.



© 2019 FLEXMAX™ Packaging for  
Floor Care Products from Midlab®  
Silver Award – Expanding the Use of Flexible Packaging  
Manufacturer: Printpack

## Promotion

FPA will have a new publication, *FlexPack Voice™*, both in-print and online as a new platform with which to push data and content to members, member's customers, policy makers, and consumers. With six print issues a year and dynamic digital content, FPA will truly be the "voice of the flexible packaging industry" in the U.S. FPA has also positioned the Association and its membership well for an "influencer," program that will utilize third party discussion and support. FPA will generate messages for mommy bloggers, outdoor enthusiasts, and climate experts, for example to add to our own messaging.



© 2019 Before Brands SpoonfulOne Strawberry Puffs  
Silver Award – Printing & Shelf Impact  
Manufacturer: CL&D Graphics, Inc.



© 2019 ConAgra Slim Jim Premium Smoked Sticks  
Silver Award — Printing & Shelf Impact  
Silver Award — Packaging Excellence  
Manufacturer: Bemis Company, Inc.

## Industry Data

New research on transitioning from flexibles from other packaging types will be released in the first and fourth quarters of 2020 as chapter case studies to influence brand owners looking to make the switch. In addition, FPA will be researching brand owner and converter insights on sustainable packaging in order to better define the terms and goals, and support efforts around all recyclable and compostable packaging in the future.



© 2019 A Sensational Pouch  
Silver — Technical Innovation  
Silver — Printing & Shelf Impact  
Silver — Packaging Excellence  
Manufacturer: St. Johns Packaging Ltd.



**FPA**<sup>™</sup>

Flexible Packaging  
Association

185 Admiral Cochrane Drive | Suite 105 | Annapolis, MD 21401  
(410) 694-0800 | [fpa@flexpack.org](mailto:fpa@flexpack.org) | [www.flexpack.org](http://www.flexpack.org)