



The Association for Packaging  
and Processing Technologies

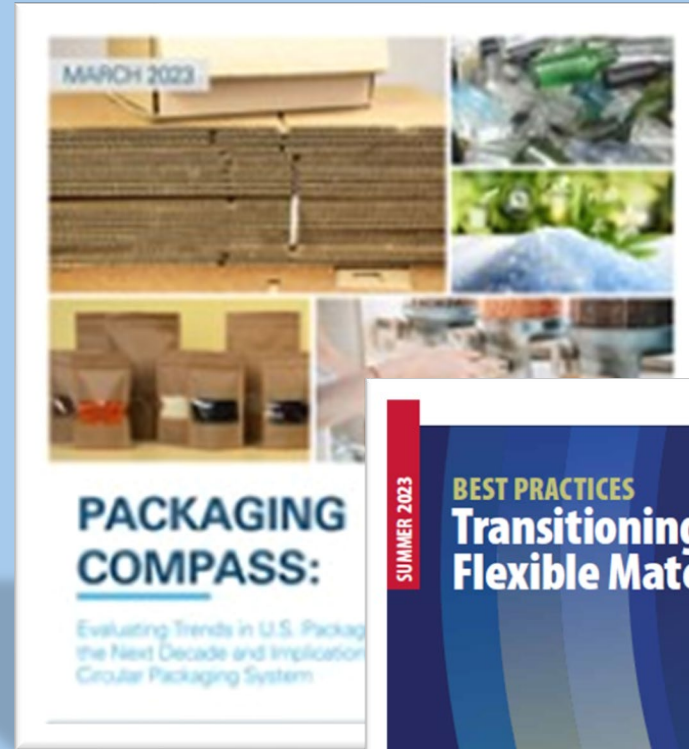
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# Flexing Change: Exploring the Dynamics of Materials Transitions in Packaging Operations



**The Association for Packaging  
and Processing Technologies**



Compostable  
packaging  
material is poised  
to increase

**15-16%**

over the next  
decade

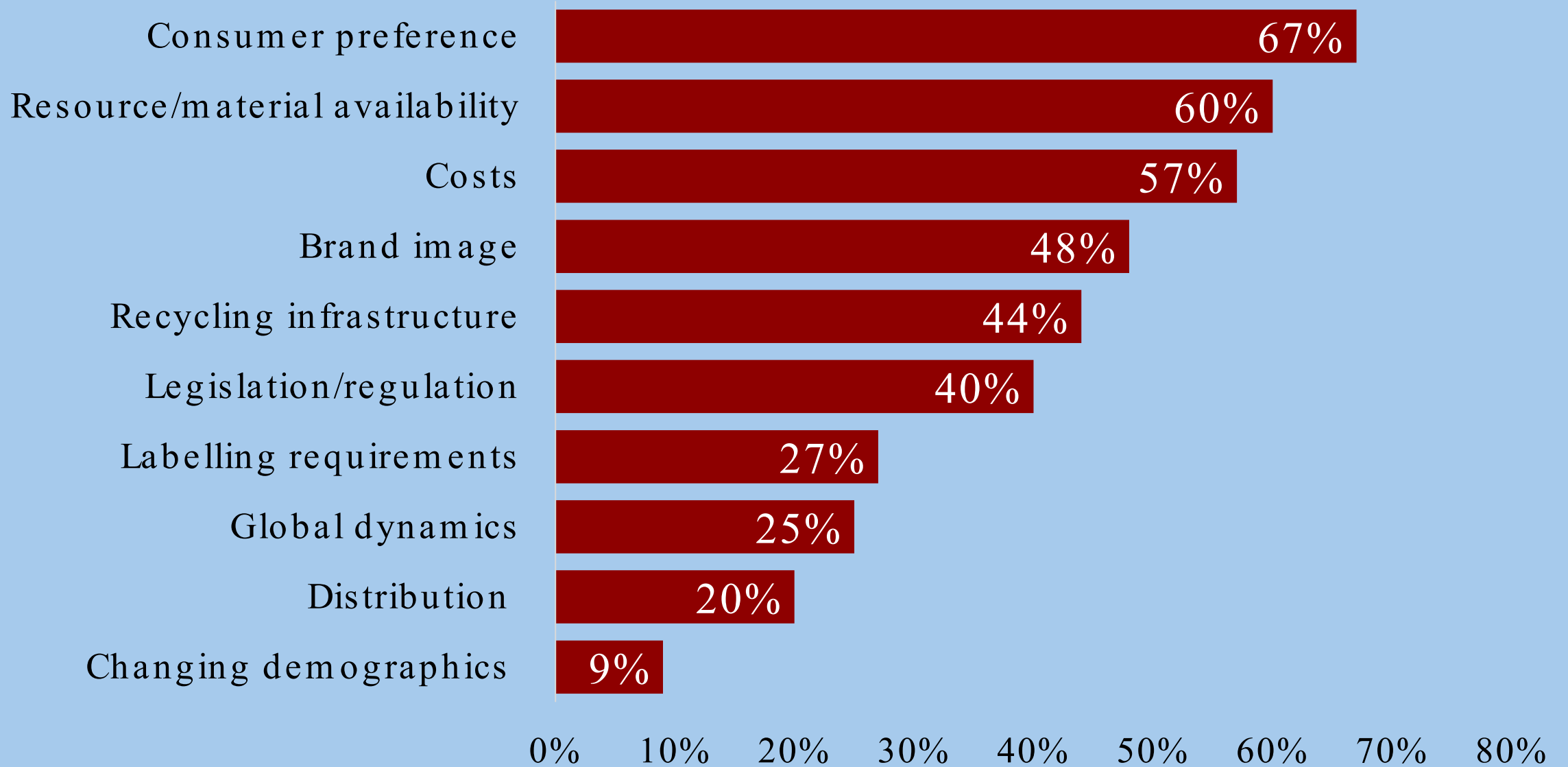
**PCR  
Usage**

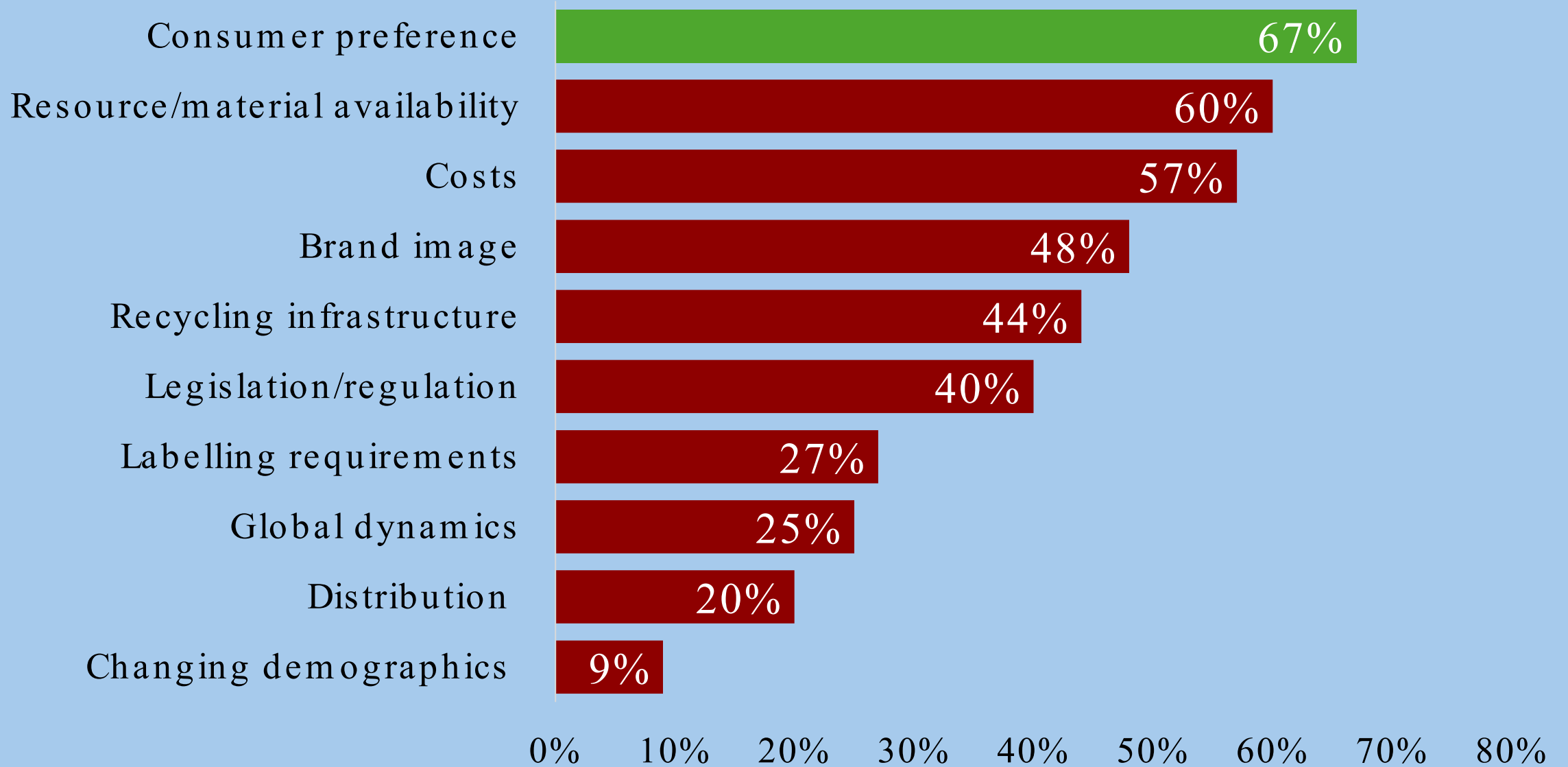
**25-30%**

increase in  
packaging  
by 2025

Flexible films  
are expected to  
grow at an annual  
CAGR of

**4-6%**





**What percentage of consumers state they are either "Very" or "Somewhat" aware of the sustainability goals of the brands they typically buy?**

**82% of respondents to this survey are either “Very” or “Somewhat” aware of the sustainability goals of the brands they typically purchase.**



of respondents consider themselves “very aware” of the sustainability goals of the brands that they typically purchase.



of respondents consider themselves “somewhat aware” of the sustainability goals of the brands that they typically purchase.

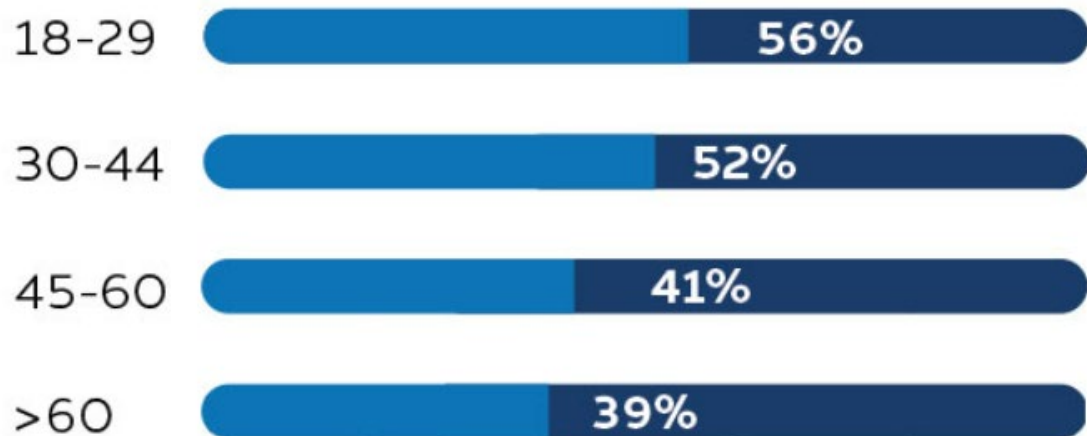


of the respondents consider themselves “not aware” of the sustainability goals of the brands that they typically purchase.



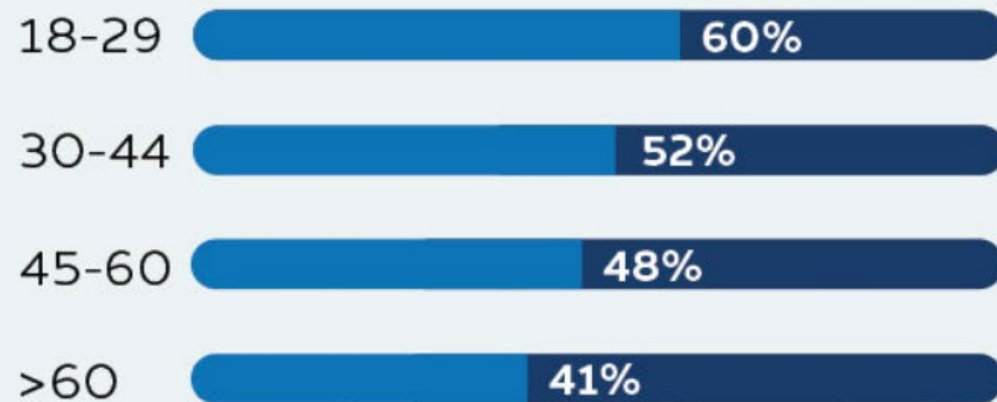
of respondents have purchased a product from a competing brand (a brand they wouldn't normally purchase) because they offer sustainable packaging.

**Breakdown by Age:**



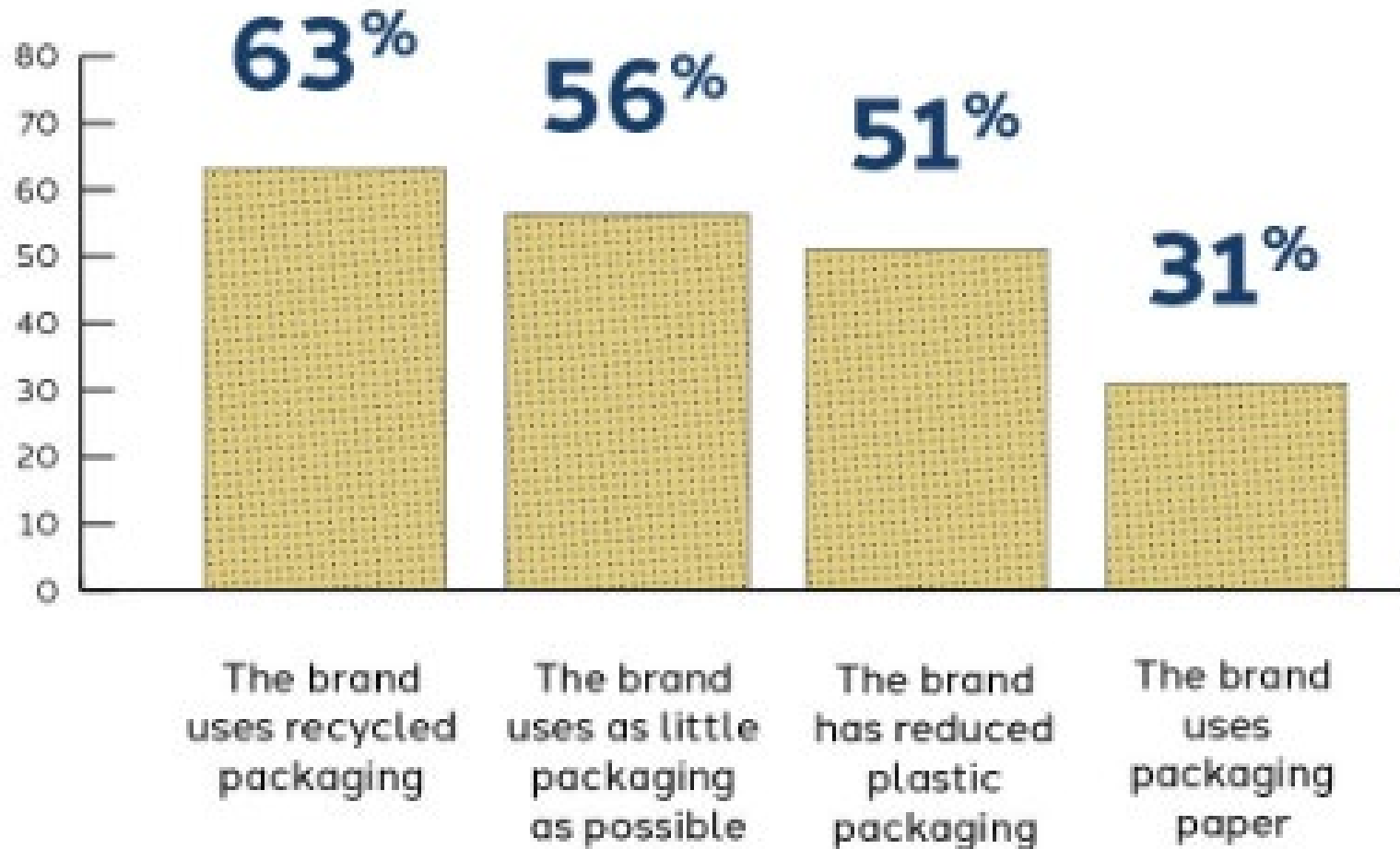
of respondents stated they consider sustainable packaging the most important sustainability initiative for retailers and brands at this time.

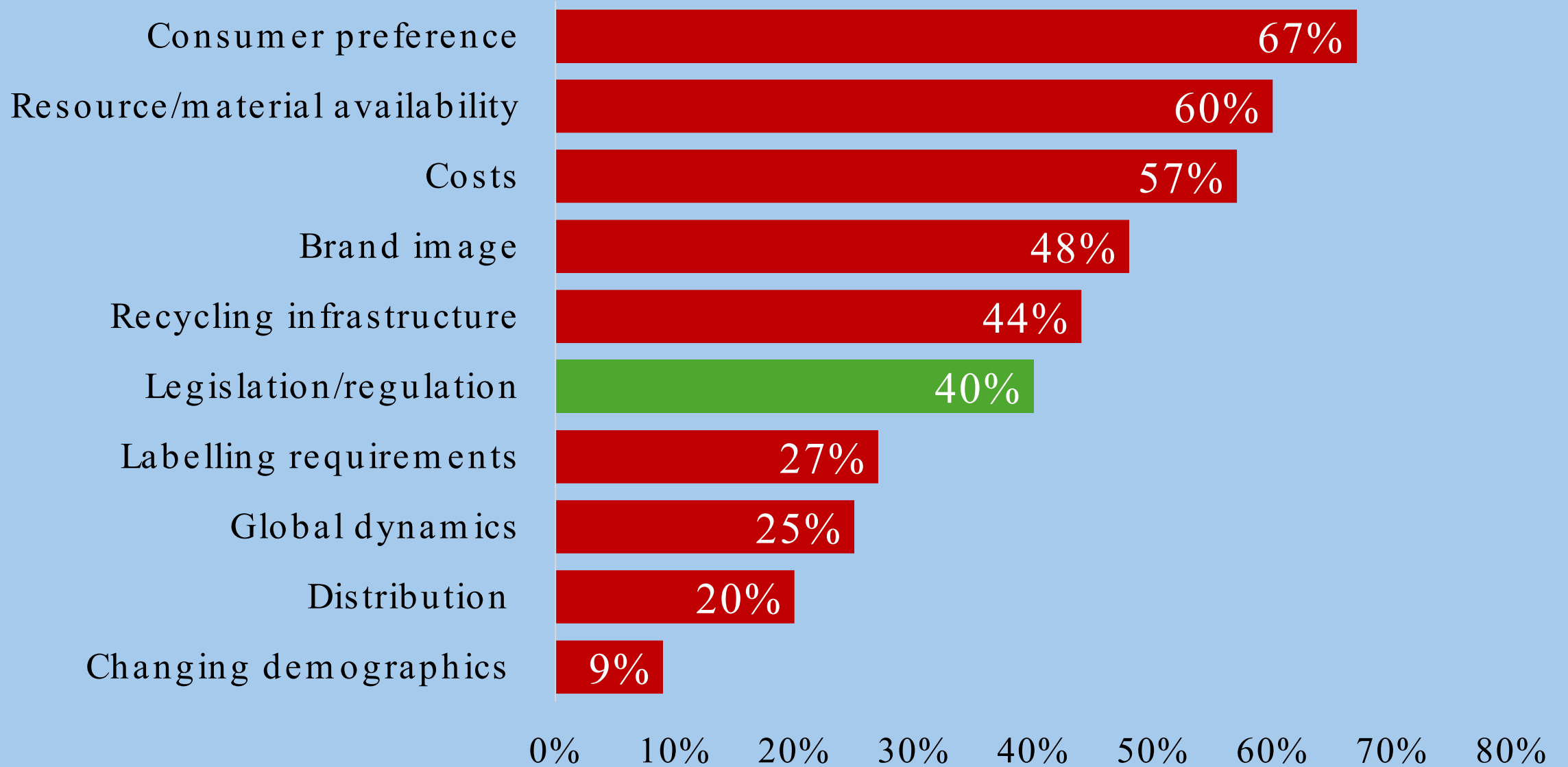
**Breakdown by Age:**

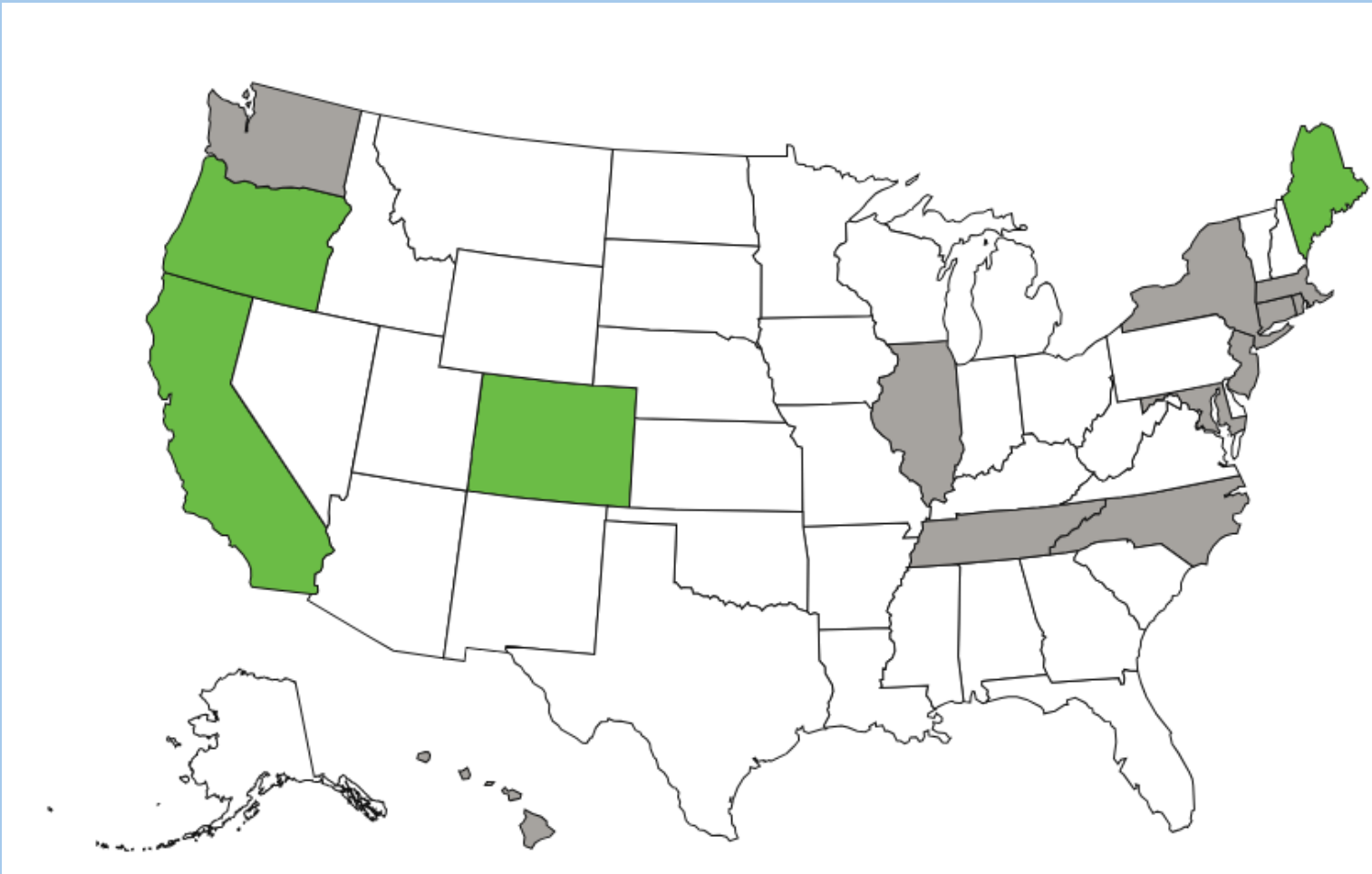




## The Most Important Factors for Consumers Around Sustainability When Shopping







4 EPR for packaging bills have passed in the United States.

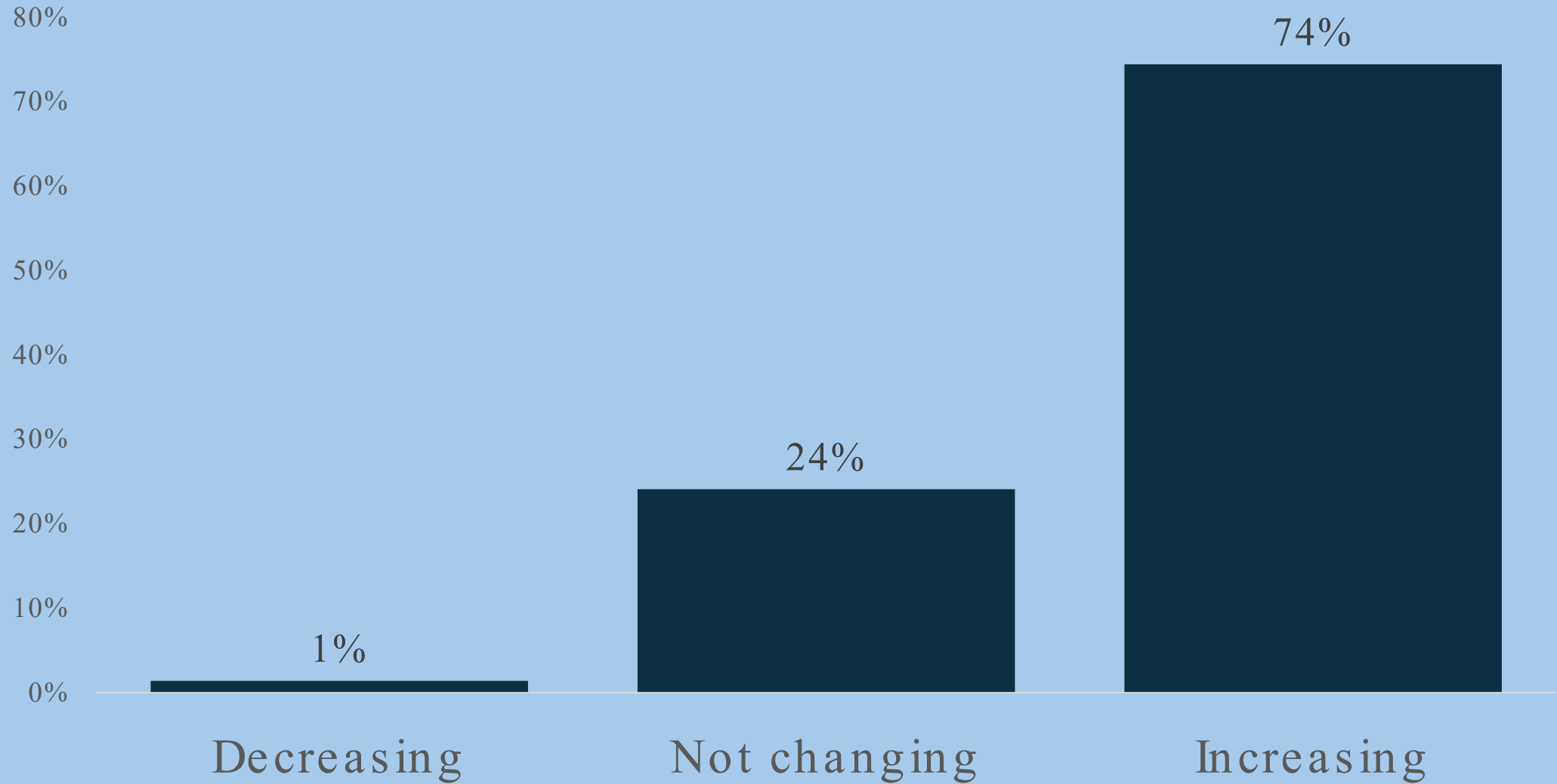
11 States have introduced legislation on EPR, so far, in 2023.

94 bills are currently on the Table in the US. 7 have been introduced since January 2024.

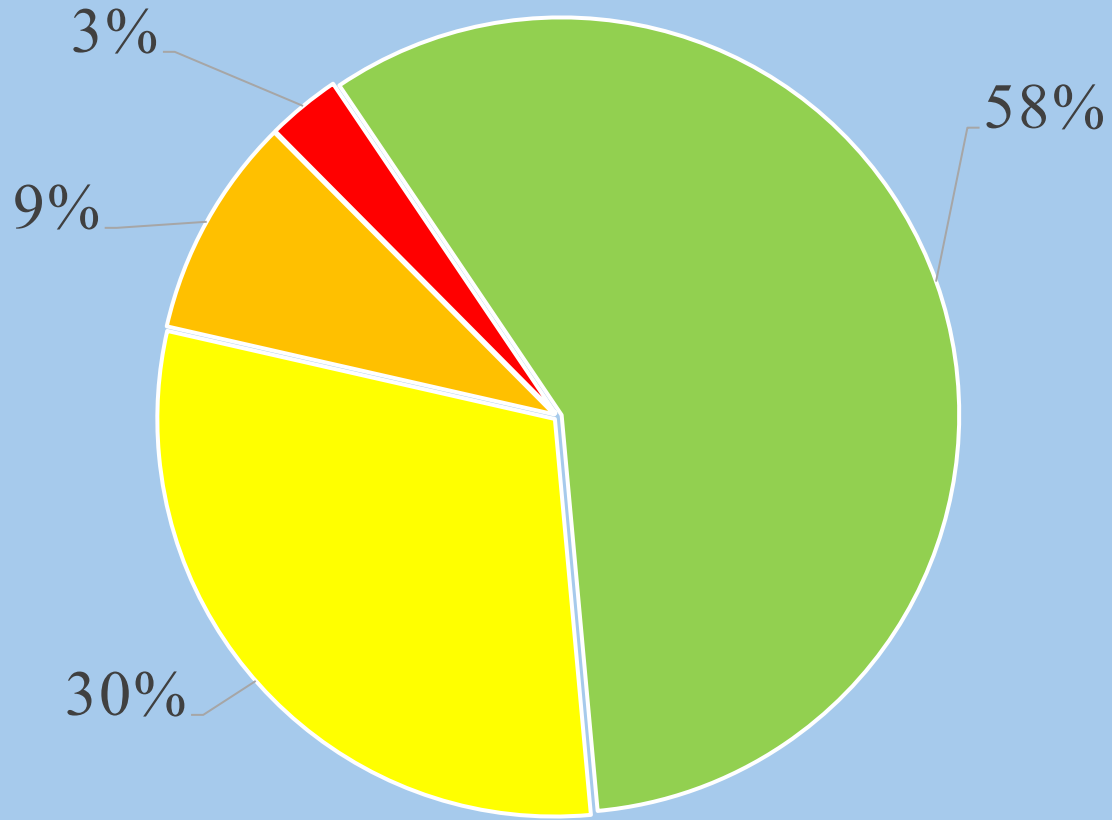


**Over the last five years, how has the frequency of materials transitions changed?**

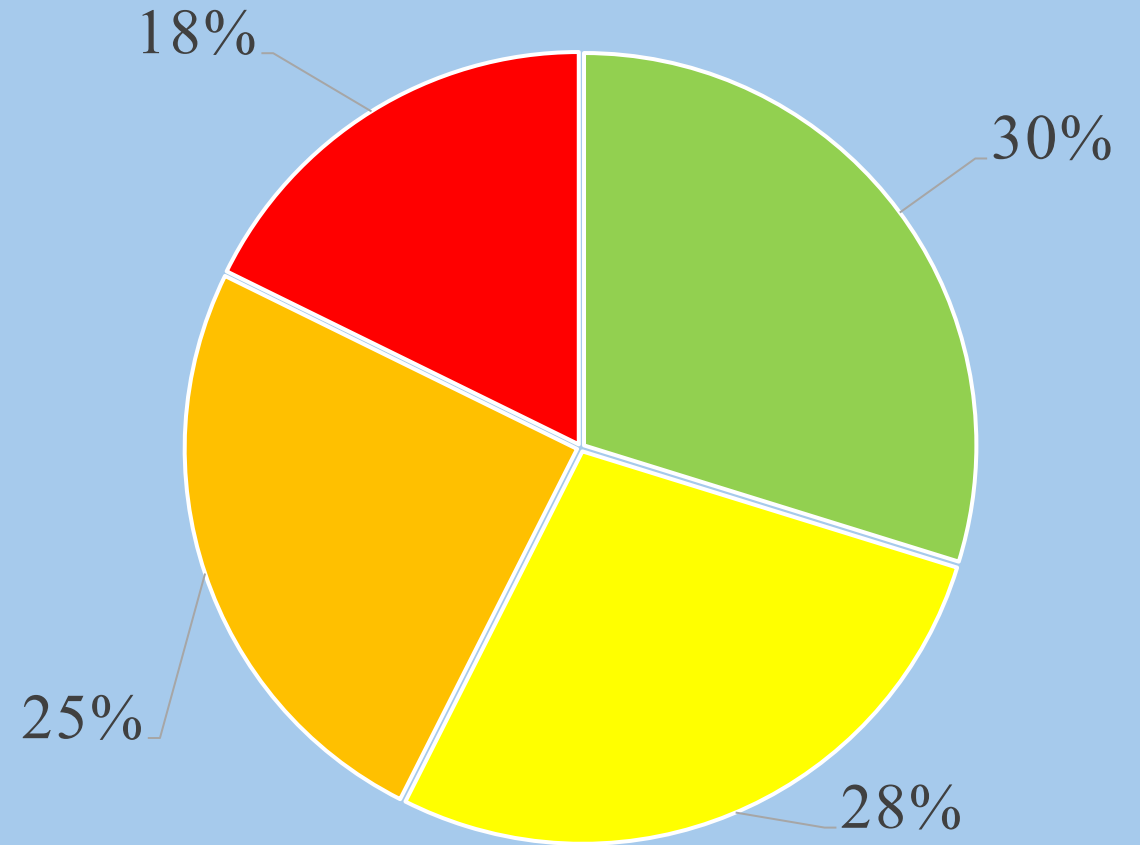
Over the last five years, how has the frequency of materials transitions changed?



Frequency of Transitioning Materials - CPGs/Contract  
Packagers  
January 2023



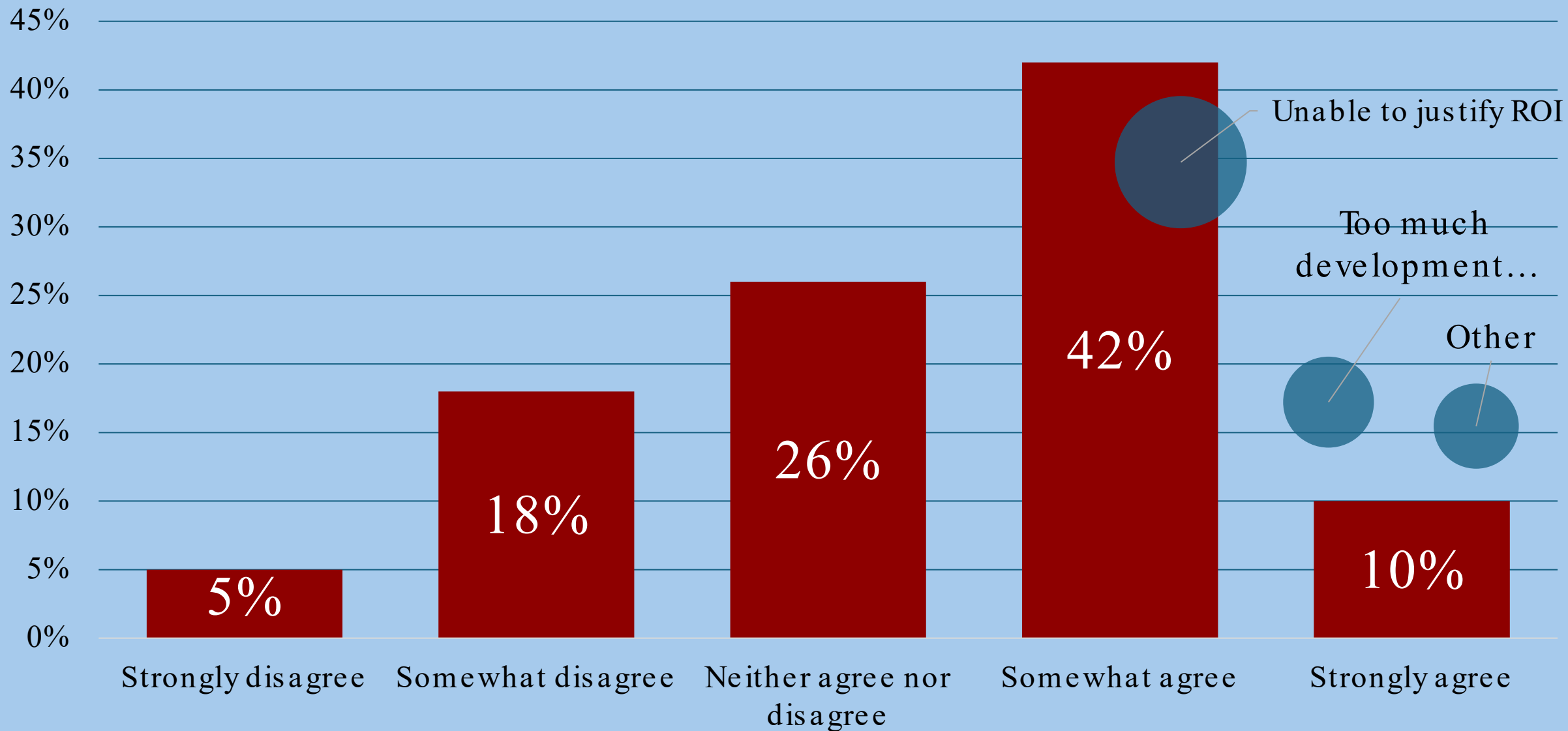
Frequency of Transitioning Materials - CPGs/Contract  
Packagers  
September 2023



■ Less than once a year ■ 1-2 times per year ■ 3-5 times per year ■ More than 6 times per year

**What was your experience like the last time you transitioned materials on a packaging line?**







- CPGs
- OEMs
- FPA members

What Materials is Your Industry Replacing?

What are Materials being Replaced with?

All Materials

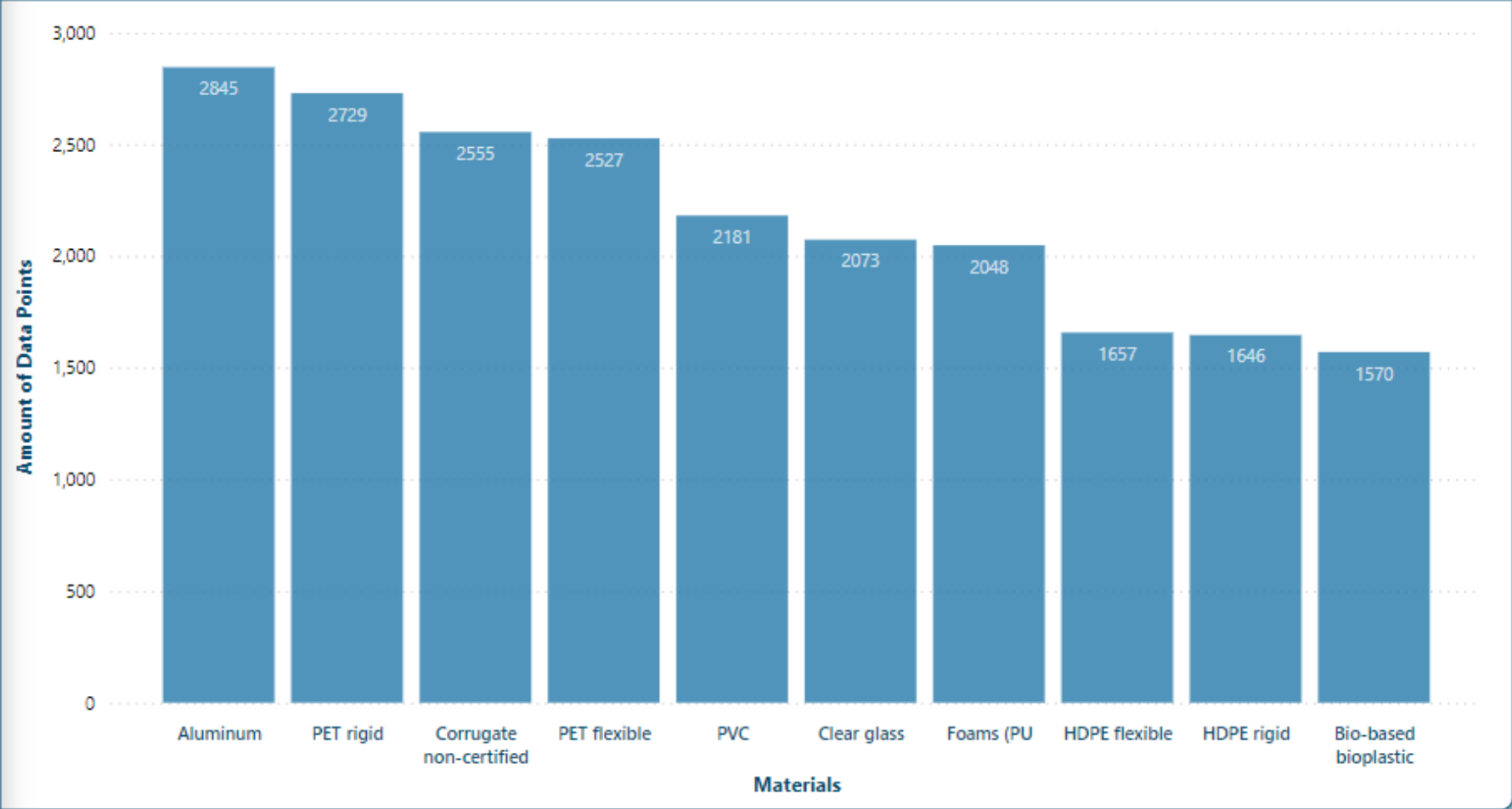
Clear Filters

**41K**  
Data Points

Select Your Industry or Industries:

- Select all
- Automotive Products
- Bakery/Snack
- Beer
- Biological/Biopharmaceutical
- Building/Construction/Home Improvem...
- Cannabis/CBD/Hemp Products
- Cereals
- Chemical
- Coffee
- Confection
- Consumer Electronics and Appliances
- Contract Manufacturing Organization-P...
- Dairy
- Dairy Products
- Detergents
- Drinks
- Frozen/Refrigerated Foods
- Fruits
- Grains
- Hardware/Tools
- Ingredients
- Juice
- Meat/Poultry/Seafood

**TOP 10 Materials to be Replaced in Your Industry** (based on your selection)



## 18

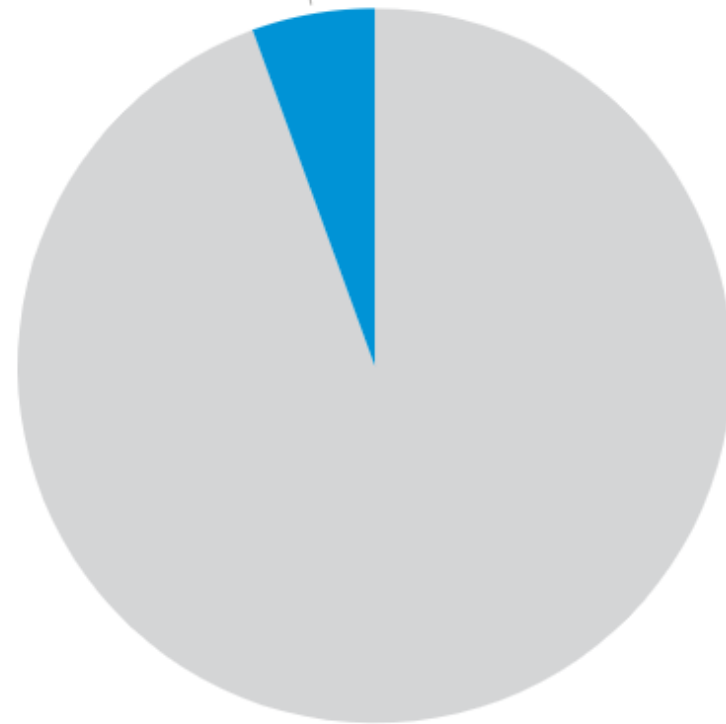
Data Points

### Materials Currently Using

- Aluminum
- Bio-based bioplastic
- Clear glass
- Colored glass
- Compostable
- Corrugate non-certified
- Corrugate with forestry certification
- Foams (PU, PS, PE)
- HDPE Flexible
- HDPE Rigid
- Kraft Paperboard non-certified
- Kraft paperboard with forestry certification
- Laminated paperboard
- LDPE Flexible
- LDPE Rigid
- Molded Pulp
- Multi-material (i.e. cartons or composite cans)
- Multi-material Flexible
- Multi-material Rigid
- Other
- PCR Flexible
- PCR Rigid

### Planning to Replace Within the Next 5 Years

Recycled paperboard with forestry certification  
5.56%



X Not Replacing 94.44%

- **Change is not coming....it's here and it's rapid.**
- **How can you best use what you've learned to persuade decision makers to get involved? How can you get decision makers to be proactive?**
- **At the end of the day, every part of the packaging value chain is a business, and should be thought of, as such.**

**THANK YOU**  
**FROM**  
**PMMI/PMMI MEDIA GROUP**

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