

Recycling In America

Film & Flexible Packaging:
Building the Roadmap

October 9, 2025



**The Recycling
Partnership**

Building a Better Recycling System

Our Plan for Today

Welcome! What's on your mind?

Setting the Stage: How did we get here?

Perspective from the Field: Guest speakers

Closing: Key takeaways and actions



Film & Flexible Packaging: Building the Roadmap

Speakers



Neil Menezes

*VP of Material Services
Circular Action Alliance (CAA)*



Maite Quinn-Richards

*Executive Director
U.S. Flexible Film Initiative
(USFFI)*



Rachael Lawrence

*Sr. Director of Sustainability
PepsiCo*



Teo Medellin

*Director of Corporate
Packaging Sustainability
P&G*

Film & Flexible Packaging: Building the Roadmap

Webinar Hosts



Karen Bandhauer

Sr. Strategic Advisor



Katherine Huded

*Executive Director,
Material Systems*

Film & Flexible Packaging: Building the Roadmap

Chat/Q&A Support



Kate Davenport

Chief Impact Officer



Danielle Easdale

*Director,
Material Systems*



Dylan de Thomas

*Vice President,
Public Policy &
Government Affairs*



Our mission is to build a better U.S. recycling system.

The Recycling Partnership is a purpose-driven NGO.

We are a team of experts, practitioners, and thought leaders with the real-world experience needed to overhaul the U.S. recycling system through on the ground action.

Reminder: What must be true for the U.S. recycling system to really work?



- 1 Design for Recycling: All packaging needs to be designed for recyclability.
- 2 Ability to Recycle: All households need access to recycling in their home.
- 3 Public Participation: Residents need to fully engage in recycling.
- 4 Recycling Infrastructure: Recycling facilities need to effectively process the material.
- 5 Old Stuff → New Stuff: Recycling facilities need sufficient end markets.

Building the Roadmap for Film & Flexible Packaging





Film and Flexibles Packaging

A Growing Packaging Stream with Limited Recycling Options

1

Film and flexible packaging (FFP) makes up **34% of the total U.S. plastic packaging industry.**

2

Only **2% of households can recycle film and flexibles**, and even less makes it out of the MRF and to end markets.

3

Few MRFs accept film and flexibles today because of capture challenges, upside down economics, and limited end markets.

California's SB 54: Mandated Targets



**100% Recyclable
or Compostable
by 2032**



**Recycling Rate
Targets**

**30% by 2028
65% by 2032**



**Responsible End
Markets (REMs)**

**Feedstock shipped
from REM to
manufacturer counts
for recycling rate**



**Source Reduction
Targets**

**10% by 2027
25% by 2032**

Initial state-defined FFP categories are not considered recyclable due to lack of curbside access and effective MRF sortation.

Organizations Supporting Film and Flex Recycling in the U.S., Canada and Europe

United States Orgs



Canadian Orgs



European Union Orgs



Global Learnings to Inform California Early Solutions



#1 – Move Collected/Sorted Material to End Markets

- Transportation Support
- Long Term Agreements
- Policy to Strengthen Demand
- Equipment Upgrades for End Markets to Take Residential FFP

#2 - Advance Collection/Sortation Infrastructure Opportunities based on California Landscape

- Existing Infrastructure
- Communities
- Material Recovery Facilities (MRF)
- Secondary Sortation



CalFFlex

An Initiative of The Film
& Flexibles Recycling Coalition

Objective:
**Demonstrate scalable pathways
to achieve trending toward
compliance with SB54.**

1

Leverage half a decade of experience and over 50 FFP project learnings.

2

Build scalable pathways for FFP to comply with SB 54.

3

Consistent coordination with California facilities and experts on the ground.



**The Recycling
Partnership**

Building a Better Recycling System

CalFFlex will Map Collection and Sortation Solutions, Support End Markets, and Help Inform the Plan in California

1



**Map Blueprint of
Two Possible
Solutions**

(MRF, Secondary
Processing Capture)

2



**Support Potential
Responsible
End Markets
& Stimulate Demand**

3



**Deliver Blueprint to
Help Inform Producer
Responsibility
Organization**

Estimated Current State of Residential FFP in California

The biggest opportunity lies in increasing end market demand/capabilities and improving collection and sortation capture.



500K+
Est. Tons
Residential FFP



20%
Sortation
Capture



<10%
Est. End Market
Demand
& Capabilities

FFP recycling in California is an all-hands-on-deck moment.
The entire value chain, from brands and retailers, to reclaimers and manufacturers, are needed at the table, and many already are.

Steering Committee



KraftHeinz



Coalition Members



ExxonMobil

Ferrara.



**L'ORÉAL
USA**



scJohnson
A family company
at work for a better world



Advisory Committee



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The U.S. PRO – Circular Action Alliance

- Circular Action Alliance (CAA) is a 501(c)(3) nonprofit PRO dedicated to implementing effective EPR laws for paper and packaging in the U.S.
- CAA was founded by companies from the food, beverage, consumer goods, and retail industries.
- CAA has been approved to be the single PRO in California, Colorado, Minnesota, Oregon, and Maryland.



CAA's Mission

- CAA's mission is to help producers comply with EPR laws, deliver harmonized, best-in-class services and work with governments, businesses and communities to reduce waste and recycle more.

CAA will:

- Meet state-specific regulatory requirements;
- Leverage existing recycling systems and infrastructure; and
- Advance the circularity of covered materials through collaboration with local governments, service providers, and recycling system interest holders.





Who is USFFI?

A CPG led initiative focused on demonstrating models to recycle all branded flexible plastic and to help obligated producers meet packaging EPR and consumer expectations while continuing commitments to design for circularity.

FOUNDING MEMBERS

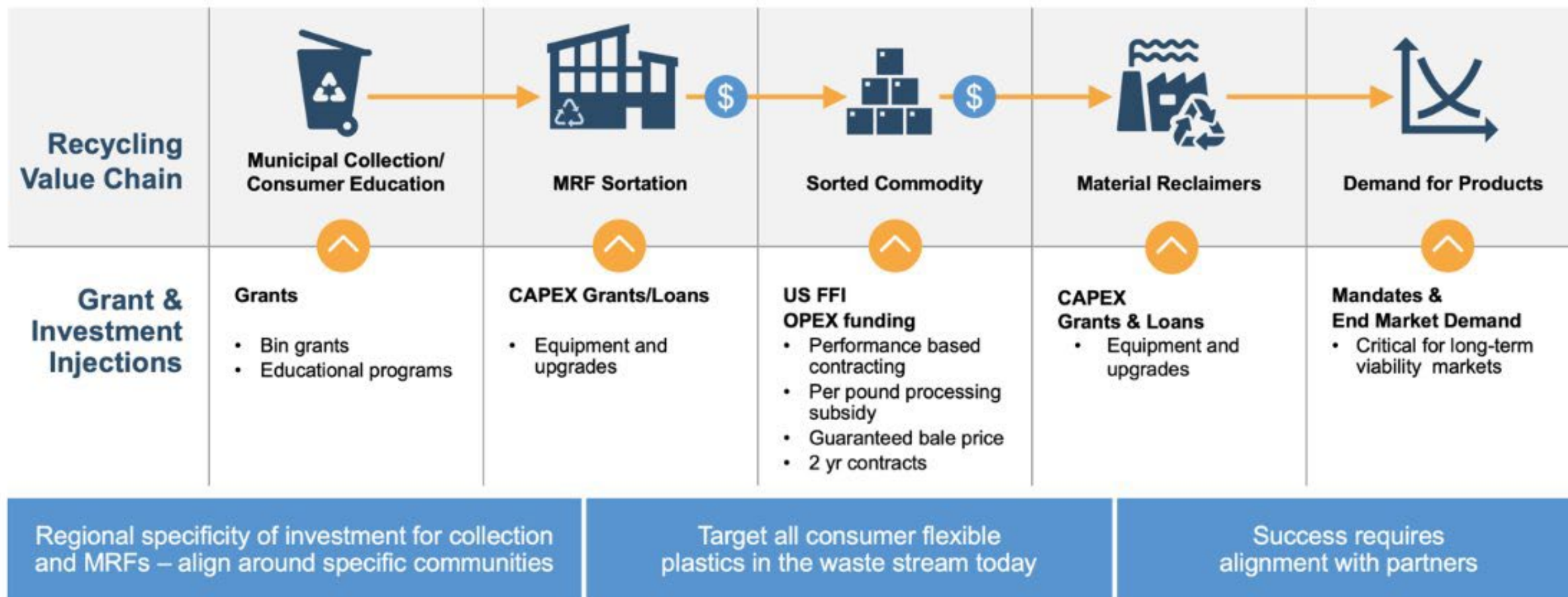
MARS



GOAL

End-to-End Solution for Flexible Plastic Packaging

US FFI is one essential part of a larger system



Key Takeaways



Solutions for film and flexible recycling exist – it's time to apply global & national learnings uniquely to California.



Collection, Sortation, and End Market Demand advancements are critical, and there's no one-size-fits all.



EPR policy is expediting solutions, enabling the PRO, NGOs and industry to build momentum and get moving on what works!

Get in Touch:

The Recycling Partnership

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🌐 recyclingpartnership.org



Scan to Learn More



**The Recycling
Partnership**

Building a Better Recycling System

We're a purpose-driven organization committed to building a better recycling system that delivers economic and environmental benefits for communities and the industry.