The Great Pullback
How waning sustainability ambitions impact US packaging producers

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The Great Pullback

Why companies are retreating

What happened between 2018 – 2020?

- Major CPGs set ambitious packaging sustainability goals (e.g. 100% recyclable/reuseable/compostable by 2025)
- Motivated by NGO pressure (e.g., Ellen MacArthur Foundation), public sentiment, and ESG expectations – not policy mandates

By 2025, reality caught up:

- Fragmented recycling infrastructure

  +
- Unrealistic material goals

  +
- Regulatory patchwork

  +
- Consumer sentiment shift

= Quiet walk-backs of goals

Exits from the US Plastics Pact

Strategic pivots

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Narrative shift: Idealism → realism

Costs

Regulation

Shelf-life

End-of-life

Additives

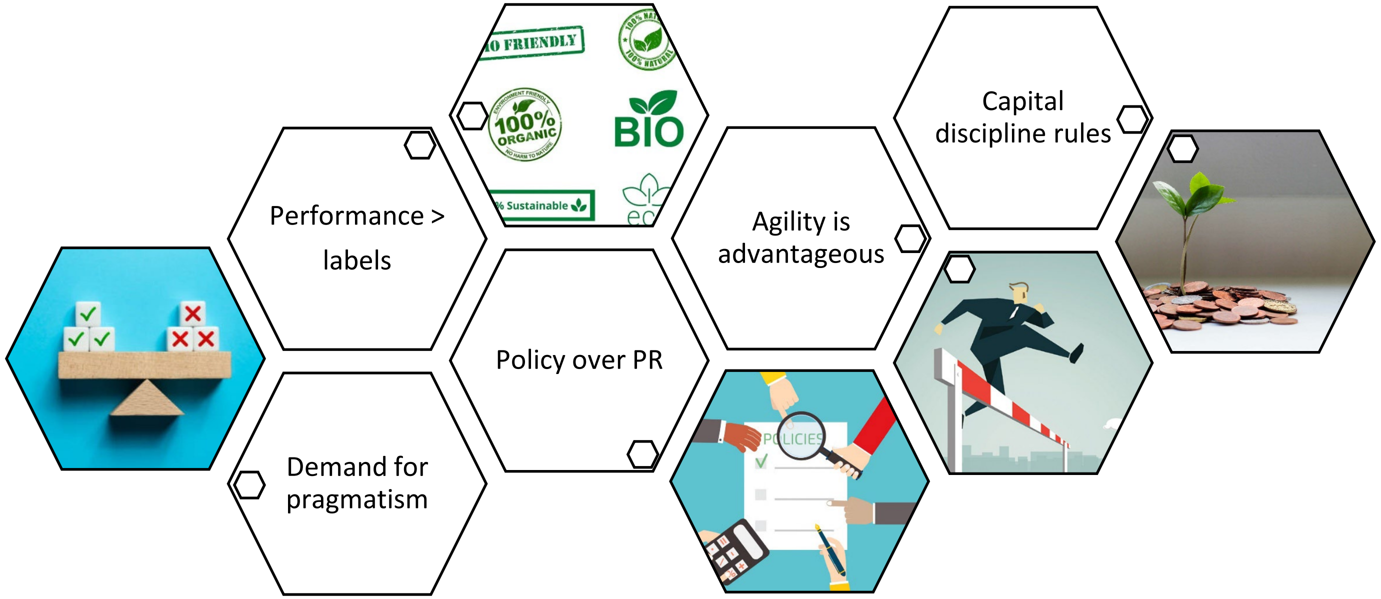
Consumers

Emissions

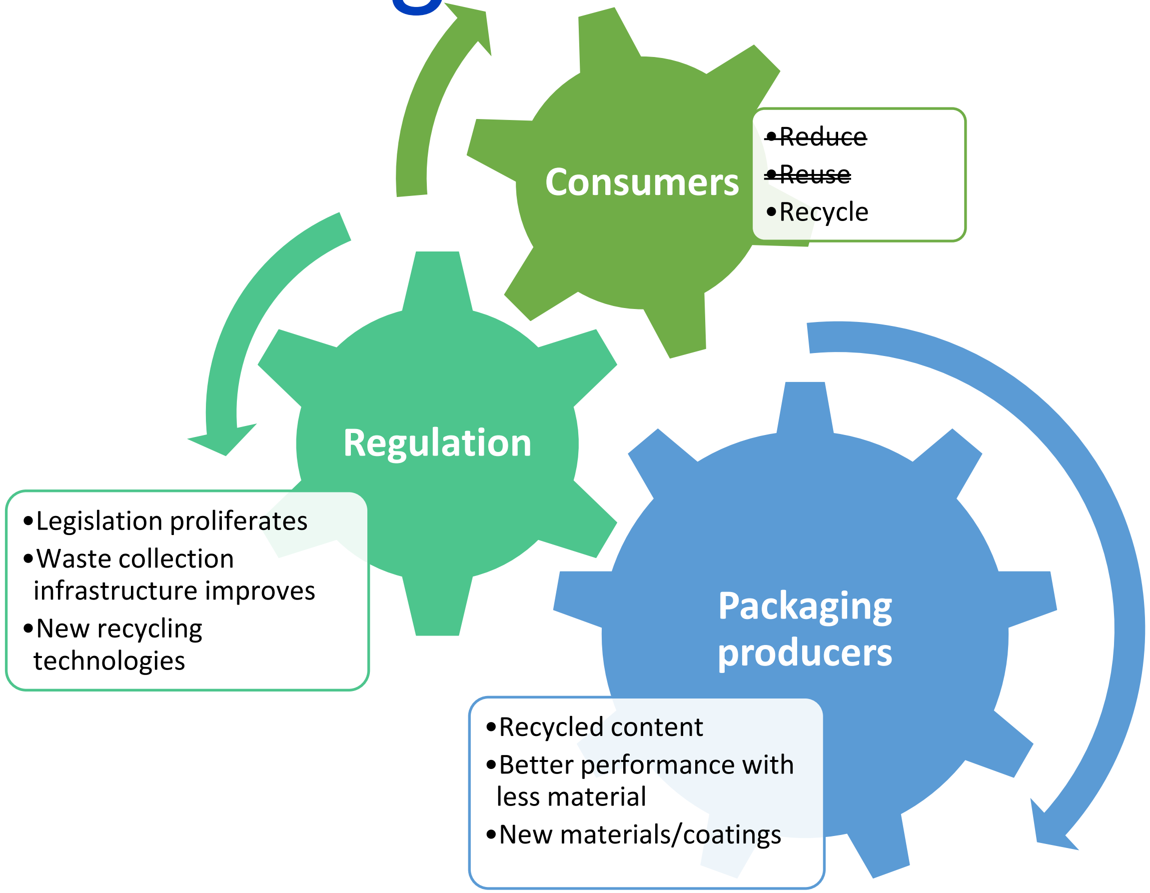
What this means for packaging producers

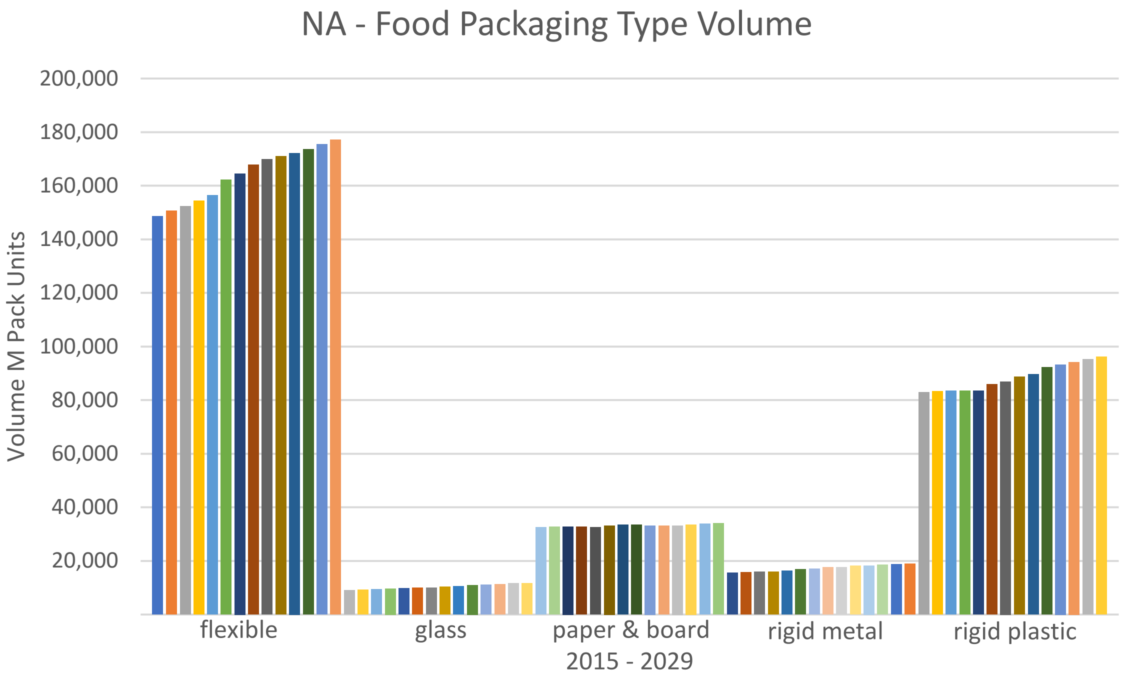
Why this moment matters:
Industry change in motion

1. Brands want partners, not just suppliers
2. US state level regulation is taking the place
3. Value will come from real-world results
4. Financial discipline is reshaping the packaging agenda



Looking ahead





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What producers should be considering

- Reframe to total packaging performance
- Offer realistic, region-specific recyclability data
- Develop modular specs (flex materials in and out as needed)
- Secure PCR supply & diversify sources
- Create co-investment pilots with brands and recyclers
- Invest in digital traceability / chain of custody
- Engage state-level policy & EPR design
- Standardize documentation (EPDs, ISCC/RecyClass, APR)

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Q&A / discussion

How do you see these shifts impacting your business over the next two years?

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