



Path to Plastics Packaging Circularity

PLASTICS Open House
August 19, 2026



Key Drivers: Recycling Research & Systems Enhancements



Critical Research

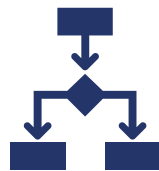
Advanced Recycling & EPR



Pathway: Pathway exists for advanced recycling in EPR states

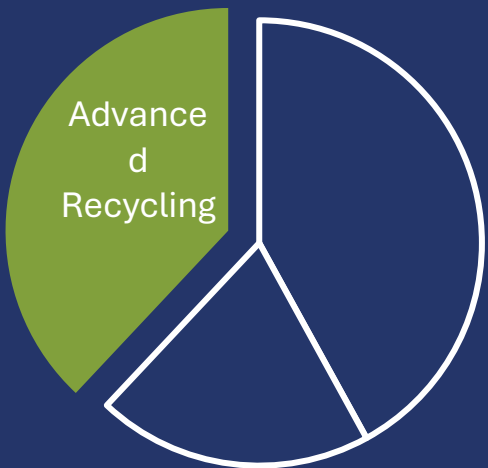
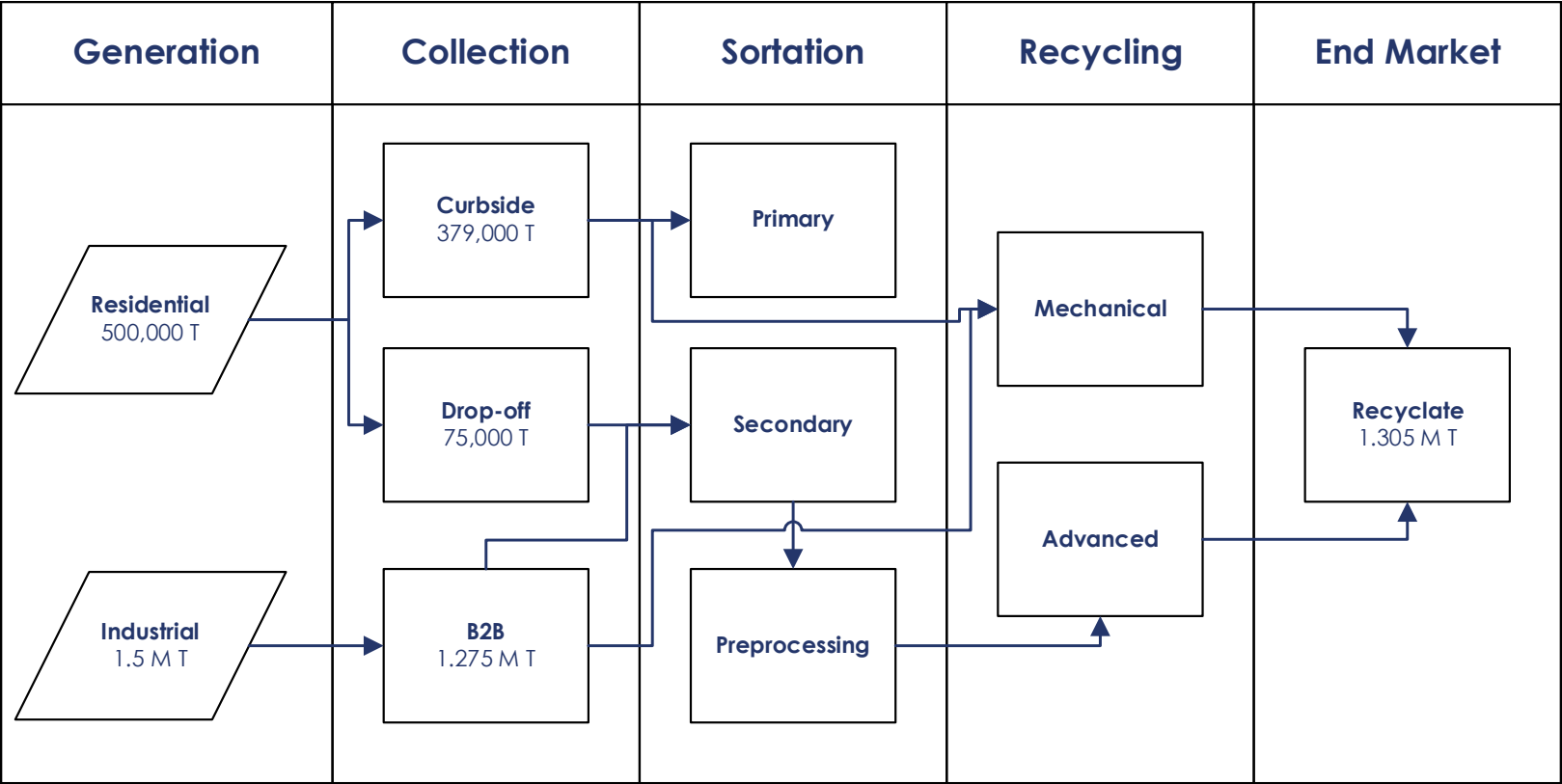


Hard-to-recycle: Advanced recycling is viewed as critical for increased recycling of hard-to-recycle plastics like mono and multi-material film packaging



Structure: Key technology decisions are still in progress

CA Model: Film Packaging Recycling Pathway



Advanced recycling could boost capture by 38%

California Law

Year	Recycling Rate (%)
2028	30
2032	65



Flexible packaging has low recycling rates



Low climate impact



Favorable packaging to product

“Embracing the Messy Middle of Recycling”



Models are useful to examine how components interact or to facilitate discussion – not to make predictions.

Key Findings



Adding secondary sortation is a key opportunity to boost recycling capture rates.



AR is essential to achieving California's 65% recycling goal, addressing materials beyond the reach of mechanical recyclers.



Clear bale specifications for advanced recycling will drive efficiency, lower contamination, and improve visibility across the recycling stream.

Scaling U.S. Advanced Recycling

Challenge: Policy makers shaping advanced recycling conditions lack robust research to guide decisions.

- Identify **infrastructure** required to scale U.S. advanced recycling.
- Evaluate how **mass balance attribution** methods affect required infrastructure.

	No Mixing	Mixing
Benefit	High physical presence	Lower physical presence
Trade off	Limited infrastructure	Leverage existing infrastructure



Film Recycling: Radical Collaboration

An effective holistic systems approach is viewed as critical to meaningful progress in increasing recycling rates—especially for film and flexible packaging.



Flexible Film Peer Collaborative



Circular Action Alliance Taskforce



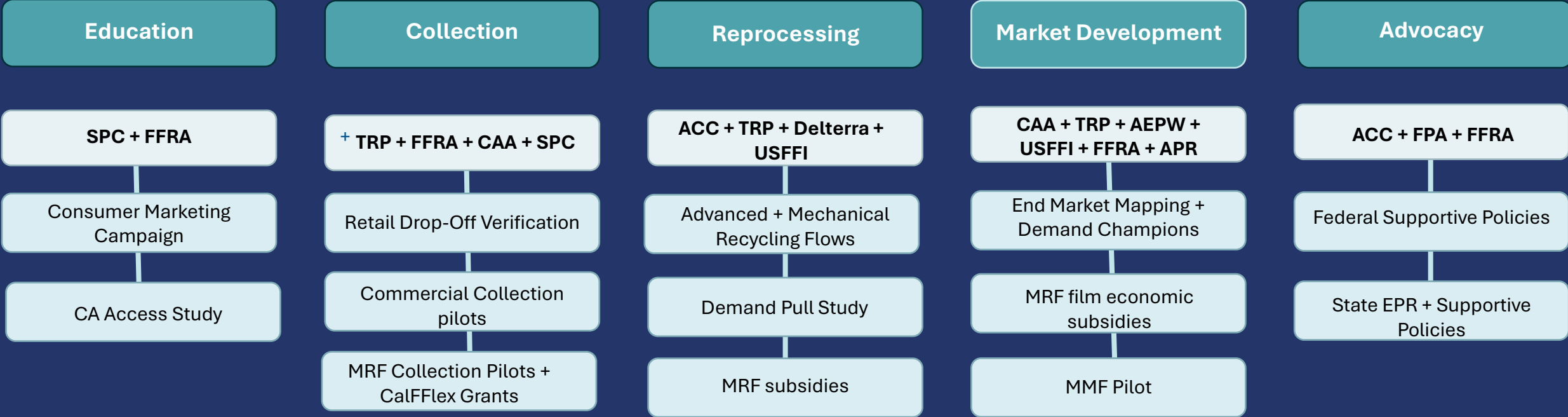
“Unlocking flexible plastic recycling at scale requires value chain alignment across investment, collection, infrastructure, and policy.”—Unilever, Nestlé, Mars, PepsiCo, Mondelez International

Flexible Film Recycling Peer Collaborative



Flexible Films Initiatives: California Landscape 2025–2026

Flexible Films Initiatives: California Landscape 2025-2026



Flexible Film Recycling Value Chain Roadmap

FROM TODAY TO A CIRCULAR FUTURE

1. CURRENT STATE (Today)

Building the Foundation

2. INTERIM TRANSITION (2025–2028)

Scale Systems and Infrastructure

3. END STATE (2029+)

Circular and Scaled System

VALUE CHAIN STAGES



1. CONSUMER & USE

Consumers purchase, use and dispose of flexible film packaging.



2. ACCESS & COLLECTION

Convenient access points and effective collection systems.



3. TRANSPORT & LOGISTICS

Efficient transport to sortation and consolidation.



4. SORTATION

Sort and prepare flexible films for recycling.



5. REPROCESSING

Convert films into recycled resin or other outputs.



6. END MARKETS

Create demand for recycled content and new products.



7. POLICY & ADVOCACY

Policies, standards and incentives that enable and sustain the system.



KEY QUESTIONS (Decision Tree)

How do we drive consumer awareness and behavior change?

Where and how should we provide access to maximize capture?

How do we move material efficiently and affordably?

What capabilities are needed to sort and bale quality film?

What reprocessing capacity and technologies are needed?

How do we create and grow stable demand?

What policies and collaboration unlock and sustain scale?



KEY ACTIONS & INITIATIVES

- Consumer education campaigns
- Clear labeling and guidance
- Behavior change programs

- Retail drop-off & store collection programs
- Curbside pilots
- Convenience & access expansion

- Route optimization
- Backhaul solutions
- Regional consolidation

- Invest in sortation technology
- Improve bale quality & purity
- Improve data and tracking

- Invest in mechanical & advanced recycling capacity
- Quality standards for recycled resin
- Expand offtake

- End market mapping & development
- Product innovation
- Recycled content commitments

- Supportive policies & incentives
- Extended Producer Responsibility (EPR)
- Public-private collaboration



KEY ENABLERS

 Data, insights & consumer research

 Access infrastructure and partnerships

 Logistics & transport network

 Infrastructure, technology & workforce

 Capital investment & technology scale-up

 Market development & off-take agreements

 Policy framework & funding mechanisms



WHO LEADS

Brand Owners, Retailers, NGOs, Education Partners

Retailers, Waste Haulers, Brands, Local Governments

Haulers, Logistics Providers, MRFs

MRFs, Technology Providers, Investors

Recyclers, Technology Providers, Investors, Brand Owners

Brand Owners, OEMs, Retailers, Recyclers

Policymakers, Industry Associations, NGOs, Stakeholders

Partners Call-to-Action

Help Shape the Future & Drive Progress in Film Recycling

A circular system requires coordinated action across the value chain. We're seeking partners to help define priorities, eliminate barriers and accelerate solutions.

Together, we can:

- ✓ Increase recovery and recycling
- ✓ Strengthen end markets
- ✓ Inform policy and investment
- ✓ Scale a circular system for California

Join the effort. Shape the roadmap. Drive impact.





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