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FPA Releases New U.S. Market Profile and Circularity Assessment Report

Benchmark study examines the evolving U.S. flexible packaging landscape and identifies key pathways to improve recovery, recycling, and circularity

Annapolis, MD, November 9, 2026 – The Flexible Packaging Association (FPA), the leading advocate and voice of the U.S. flexible packaging industry, announced the publication of its *Flexible Packaging U.S. Market Profile and Circularity Assessment Report*. Prepared by PTIS, LLC on behalf of FPA, the report provides a comprehensive analysis of the U.S. flexible packaging market and evaluates the current state of circularity across the industry.

The U.S. focused report examines flexible packaging market size and composition, material formats, collection and recycling pathways, barriers to material recovery, and opportunities to expand the use of post-consumer recycled (PCR) content in flexible packaging. It offers stakeholders, policymakers, brand owners, recyclers, and the public a fact-based assessment of where flexible packaging stands today and the challenges and opportunities that will shape its future.

This new publication updates the 2021 *Flexible Packaging U.S. Market Profile and Segmentation Report* and reflects the significant changes that have occurred across the packaging landscape in recent years. Since the previous assessment, the industry has experienced post-pandemic market shifts, significant expansion of extended producer responsibility (EPR) laws, increased focus on packaging circularity, evolving U.S. trade and tariff policies, and geopolitical disruptions affecting global supply chains. Collectively, these developments have influenced flexible packaging demand, material selection, recovery expectations, and investment decisions throughout the value chain.

One of the most frequently asked questions regarding flexible packaging is whether it is recyclable. The report finds that the answer depends on several factors, including package design, consumer access to collection systems, and the recycling infrastructure available within a given region.

The research characterizes the flexible packaging recycling landscape as evolving. Established recovery pathways exist for certain flexible packaging formats, while additional pathways are emerging for others. At the same time, a portion of the market continues to face meaningful recovery challenges. As packaging designs continue to advance, overall recycling performance remains dependent on the broader system, including collection programs, sorting technologies, recycling capacity, and end-market demand for recovered materials.

The report highlights substantial industry investment in packaging innovations designed to improve circularity. In recent years, manufacturers have accelerated the development of mono-material polyethylene (PE) structures and paper-based alternatives intended to enhance recyclability while maintaining product protection and performance. While these formats are gaining market adoption, supporting collection and recycling infrastructure continues to develop and expand.

A key finding of the report is that improving circularity requires a systems-based approach. Packaging design is an important component, but long-term success also depends on investments in collection, sorting, processing infrastructure, and strong end market demand for recycled materials. By quantifying the flexible packaging formats currently in the marketplace and evaluating their potential for redesign, recycling, and post-consumer recycled (PCR) content incorporation, the report identifies the opportunities most likely to drive meaningful progress and highlights areas where additional innovation and research are needed.

Despite ongoing challenges, the report documents encouraging momentum across the flexible packaging recovery ecosystem. Brand owners and packaging manufacturers are increasingly adopting design-for-recyclability principles, with growing use of structures intended to align with existing and emerging recycling systems. Industry organizations, including the Association of Plastic Recyclers (APR) in the United States and CEFLEX in Europe, continue to advance design guidance and best practices that support greater standardization and compatibility with recycling infrastructure.

The report concludes that progress toward greater circularity will require collaboration across the entire value chain, including manufacturers, brand owners, recyclers, retailers, policymakers, producer responsibility organizations (PROs), and consumers. While no single stakeholder can solve the challenge alone, ongoing investments in infrastructure, innovation, policy development, and market-based solutions are creating new opportunities to improve recovery and strengthen the circular economy for flexible packaging.

"This report provides an important snapshot of both the progress made and the work that remains to improve circularity for flexible packaging," said Kyla Fisher, FPA's Director, Regulatory Affairs & Sustainability. "By establishing a clear understanding of today's marketplace and recovery landscape, we can better identify the investments, partnerships, and innovations needed to advance sustainable packaging solutions for the future."

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About the Flexible Packaging Association (FPA)
The Flexible Packaging Association is the voice of the U.S. manufacturers of flexible packaging and their suppliers. The association's mission is connecting, advancing, and leading the flexible packaging industry. Flexible packaging represents $51.5 billion in direct economic impact in the U.S. and is the second largest and one of the fastest growing segments of the U.S. packaging industry. Flexible packaging is produced from paper, plastic, film, aluminum foil, or any combination of those materials, and includes bags, pouches, labels, liners, wraps, rollstock, and other flexible products.