



## 2023 STATE OF THE FLEXIBLE PACKAGING INDUSTRY STRATEGIC OVERVIEW SURVEY -SUPPLIER ASSOCIATE MEMBERS

### Introduction and Company Information

**All of the information gathered is confidential and will be rolled up with other survey participants. No data or information will be attributed to any one company.**

**Not all questions require a mandatory answer, but please answer all that you can to guarantee the best results.**

**If you get to a page where someone else in your company needs to enter data, please follow the process:**

- 1.) Complete as much information as you can. Be sure to hit "Next" button at bottom of each page (that is what saves and registers your input). You may skip a page or questions, but be sure hit the "Next" button.**
- 2.) Go back to the original email you received with the survey link (from todd@ptisglobal via surveymonkey.com) and forward that email to your co-worker who will continue filling out survey. DO NOT try to paste the survey link into an email from your own email system (the system will not save your answers if you do not use the original email for accessing the link)**
- 3.) Please be sure to ensure your co-worker gets back to you after entering their data, or submit the final report.**
- 4.) When all data is complete for all pages and your survey is ready to be submitted, be sure to answer the question on the final page.**

**Thank you for your participation.**

1. Please add a **key contact** for any survey follow up.

**Name**

**Company**

**Email Address**

**Phone Number**

## 2. NET SALES

For flexible packaging products, please select the appropriate category for your company based on **annual sales in 2022**.

Note: Net sales for all U.S. facilities (including export sales) but not sales for non U.S. facilities

- ☐ Small (<\$10 million)
- ☐ Medium (\$10 million - \$150 million)
- ☐ Large (\$150 million - \$1 billion)
- ☐ Very large (>\$1 billion)

3. For flexible packaging products, please indicate **the increase or decrease in your company's volume output** for 2021 (versus 2020 levels) and 2022 (versus 2021 levels).

Please utilize whatever measure of volume applies for your business to provide a composite estimate of the overall change in volume for flexible packaging products.

	2021 vs. 2020 (volume change)	2022 vs. 2021 (volume change)
Change in volume output	<input type="text"/>	<input type="text"/>

4. Please provide the change in production totals that your company saw in 2022 versus 2021, pounds of growth (expressed as a percentage and without the percent sign) that **can be attributed to flexible packaging**. (For example for 3.2%, use 3.2. For negative values, please use the '-' symbol.)



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### Sustainability

5. Of your organization's total production waste (excluding office/lunchroom waste) generated, **what percent (%) goes to landfill** and **what percent (%) is recycled, reused, reprocessed or repurposed?**

Total should equal 100

	2021	2022
Percent to landfill	<input type="text"/>	<input type="text"/>
Percent recycled/repurposed	<input type="text"/>	<input type="text"/>

### 6. What trends do you see in emerging materials/products? (related to flexible packaging)

These may include PCR, recycle ready, biobased, reuse/refill, compostable, LCA impacts, substrate substitution (i.e., plastic to paper, glass to plastic, flexible to non-flexible) or other emerging materials.



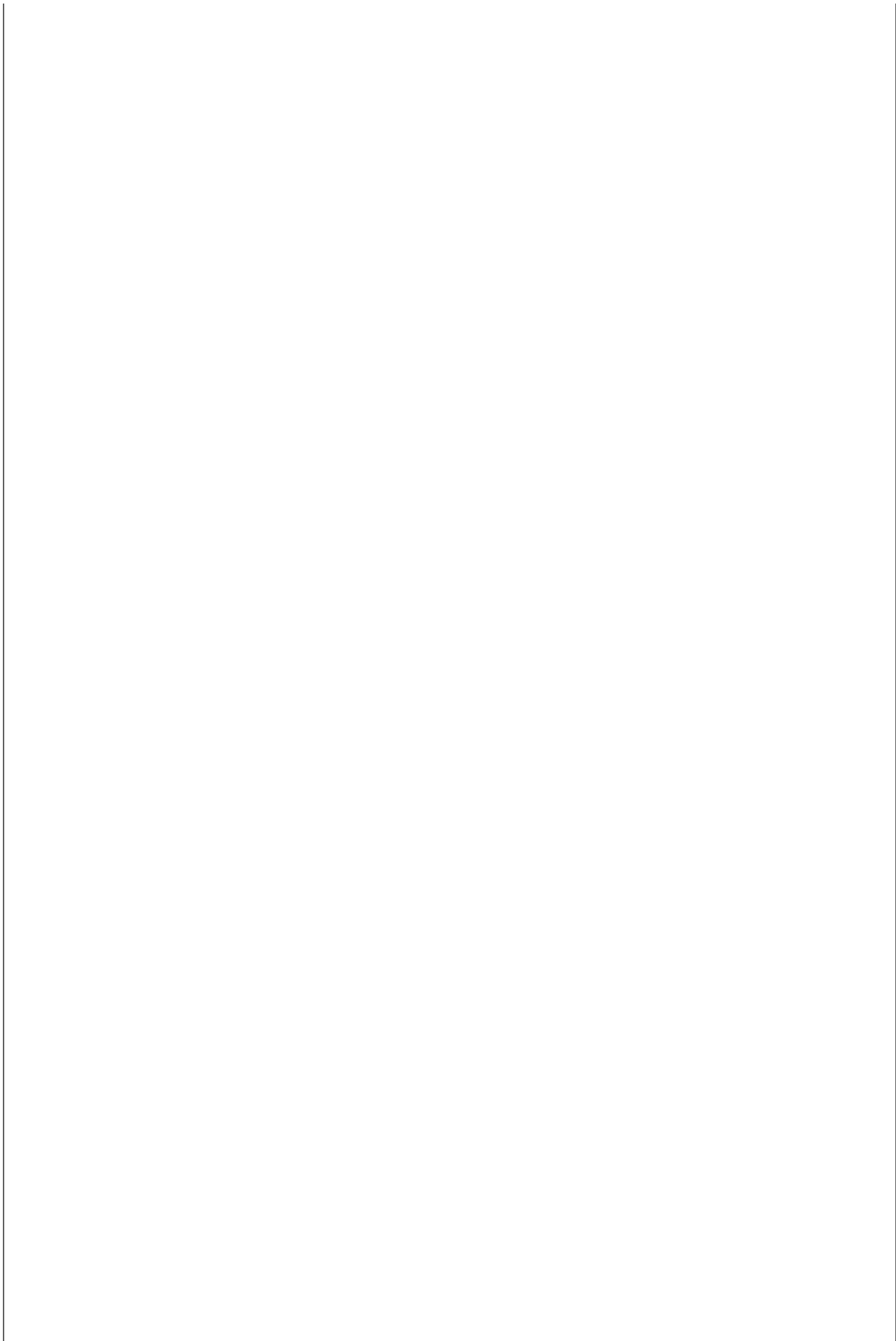
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### MOST IMPORTANT ISSUES

7. Please indicate those **issues** expected to be **most important** to your company in the year (2023) by **selecting the top 5 issues, with # 1 as the most important**. In the text box, please describe what's driving the top issues & why they are important.

	Most Important	2nd	3rd	4th	5th
Labor pool	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Management talent	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Raw materials pricing	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Growth/new products	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Sustainability/green initiatives	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Productivity/cost reductions	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Government regulations	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Technology	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Profit margin	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Imports/international sourcing	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Political uncertainty	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Economy	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Pandemic	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Prices (to customers)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Logistics/transportation	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Supply chain resilience	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Plastic perception/backlash	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Other	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Why are these the most important issues to your business?





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### OUTLOOK

**The following questions ask you to look out 3-5 years and provide your perspective.**

8. Looking ahead to the coming year **(2023)** and **out the next three years (2024 - 2026)**, what are your company's expectations of annual growth in **net sales and volume** (by weight)?

**Please indicate annual growth rate percentage** expected (ex. 3.2 or -1.2):

**Net Sales** (2023 vs 2022)

**Net Sales** (2026 vs. 2022)

**Volume** (growth %) by weight (2023 vs. 2022)

**Volume** (growth %) by weight (2026 vs. 2022)

9. Please describe **your vision** of **where the flexible packaging industry is headed** over the **next 3-5 years**.

10. What type of **developing technologies** will have the **most impact** on flexible packaging **over the next 3-5 years**?

(Ex.: Artificial intelligence, cobots, automation, augmented reality, Internet of Packaging, new sealing techniques, recyclable monolayer structures, paper with barrier coatings or other)

11. What keeps you up at night? (What are 'big issues' that your company or the flexible packaging industry needs to address?)

12. Is your company **planning to pursue/undertake an acquisition?**

	2023	2025-2027
Acquisition planned?	<input type="checkbox"/>	<input type="checkbox"/>

13. As you look ahead over the **next three to five years**, what are your expectations for the **key growth markets for flexible packaging?**

	Low/ no growth	Moderate growth	High growth	N/A
Food (retail)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Food (non-retail)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Beverages	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Personal care (health & beauty aids)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Pet food	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Tobacco/Cannabis (smoking or vaping)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Other retail non-food	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Institutional non-food	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Industrial applications (agricultural, automotive, construction, stretch films, etc.)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Medical devices/Pharmaceutical	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Nutraceuticals/Cannabis (non-smoking/non-vaping)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Shipping (ex. Bubble wrap, dunnage, envelopes/mailers, etc.)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Consumer products (storage wraps & trash bags)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>



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### FINAL PAGE

**This is the final question to make sure you have all of your information ready. If you select 'Yes', your survey will be submitted and you will not be able to further edit your data.**

14. **Are you ready to submit your company's survey?** (You do not need anyone else to submit additional data)

If you select '**Yes**', and hit the '**Done**' button your data will be submitted and the survey will be complete. If you select 'No', the survey will take you back to the beginning so you can follow the process listed and forward the original email to a colleague to complete specific questions. You may also use the 'Prev' button to move back in the survey.

An email with your company responses will be sent to the original contact upon survey completion.

☐ Yes

☐ No