



# FPA<sup>TM</sup>

Flexible Packaging  
Association

2024  
REPORT TO  
THE MEMBERS

# MISSION STATEMENT

The Flexible Packaging Association is a strategic organization and the voice of the U.S. flexible packaging industry. The mission includes facilitating industry advancement and providing a forum for industry leaders. This mission is accomplished by implementing our strategic plan that was refreshed by the FPA Board of Directors in early 2024 to cover 2025-2027.

The new strategic plan is comprised of four pillars:

**Advocate and Protect:** Advocate for the interests of the flexible packaging industry.

**Educate and Inform:** Develop industry data and market information to educate and inform industry and external audiences.

**Relevance and Expansion:** Position FPA as the organization that the industry depends upon, and the value is recognized.

**Association Strength:** Maintain the talent, finances, and structure to grow FPA for the long term.

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## Letter from the President & CEO

2024 was a year of major change and growth for FPA while we continued to focus on our core goals of advocacy, education, membership, and meetings.

The most significant change for FPA during 2024 was the departure of Alison Keane, President & CEO from 2016 to 2024. During her tenure, Alison did an exceptional job of steering FPA and the flexible packaging industry through significant times of crisis, including a global pandemic, new state laws and regulations directly impacting flexible packaging, and onerous and unfair duties on thin gauge aluminum foil not manufactured in the U.S. She did this and so much more for FPA, and always with grace, humor, and an incredible passion for our industry. I am honored to call her a colleague and friend, and will always be grateful to her for handing me the reins to an incredibly strong and vibrant organization with a bright future. Special thanks as well to FPA Vice President of Communications Dani Diehlmann for expertly “holding down the fort” after Alison’s departure in August and before my arrival in November.

Advocacy remained a high priority in 2024 at both the federal and state levels. FPA’s work at the state level produced more favorable results, with Minnesota being the first state to enact the first new law for packaging extended producer responsibility (EPR) since 2022 and in a more industry-friendly form that allowed FPA to be the first national trade association to publicly support it as it was moving through the legislative process. Wyoming became the 25<sup>th</sup> state to enact legislation enabling advanced recycling as a manufacturing process, and efforts by FPA in collaboration with other stakeholders successfully prohibited the enactment of numerous onerous proposals to ban various packaging chemicals and materials. FPA members also significantly stepped up their advocacy efforts in 2024 through a successful Congressional fly-in, several member facility site visits organized by FPA’s Emerging Leadership Council (ELC), and a successful kick-off of FPA’s new political action committee, FlexPAC®.

Significant progress was also made on meetings and membership during 2024. Our expanded and reimagined FlexForward® Conference in Charlotte in September saw record attendance and revenue, including our first-ever tabletop exhibits. FPA membership grew to almost 200 organizations in 2024 across multiple membership types, including six companies joining under our new Supporting Member category open “to any firm or corporation, or division thereof, engaged in the distribution of materials, equipment, supplies, or flexible packaging, and businesses providing services, within the U.S. and having sales in the U.S. of materials, equipment, supplies or flexible packaging, or services to the flexible packaging industry.”

As we head into 2025 and celebrate FPA’s 75<sup>th</sup> anniversary throughout the year, the future for us and our industry looks bright. With flexible packaging sales in the U.S. for 2023 at \$42.9 billion and projected to grow to \$43.8 billion in 2024 and be at \$47.3 billion by 2028, I know there is more work to be done for our growing and dynamic industry. I look forward to doing that work for and with you.



Dan Felton  
President & CEO





# ADVOCACY

## Advocacy – Federal

**Recycling Bills:** Early in 2024, the U.S. Senate passed two long-held, bipartisan FPA priorities by unanimous consent – the Recycling and Composting Accountability Act (RCAA) and the Recycling Infrastructure Accessibility Act (RIAA). The bills were subsequently held up in the House due to a single Republican staffer on the House Energy and Commerce Committee who opposed broadening the mission of the U.S. Environmental Protection Agency (EPA). In a last-ditch effort, the bills were included in a version of the year-end funding package but were stripped out at the last moment. FPA will be working closely with legislators and other stakeholders to move these bills in 2025.

**PACK Act:** Following the Senate Environmental and Public Works Committee hearing on federal EPR policies on March 6, 2024, FPA worked with AMERIPEN—American Institute for Packaging and the Environment to socialize and build support for the Packaging and Claims Knowledge Act (PACK Act) which would establish a new framework for compostable, recyclable, and reusable claims for product packaging under the existing federal Solid Waste Disposal Act. Specifically, the PACK Act would create a uniform federal structure for when compostable, recyclable, and reusable claims can be made for product packaging and would preempt

inconsistent state laws that attempt to regulate these types of claims. FPA will continue to work closely with AMERIPEN and other stakeholders to advance the PACK Act in 2025.

**Regulatory:** Following FPA’s comments on the Draft National Strategy to Reduce Food Waste, the Final National Strategy to Reduce Food Waste, released June 12, 2024, did consider packaging to some extent, albeit with an anti-plastic bias. The Biden Administration also released a new Strategy to Tackle Plastic Pollution, which would invest in recycling systems and ban single-use plastics at federal facilities by 2035. It is unlikely that these strategies will advance far, if at all, in President Trump’s Administration, but FPA will be monitoring for any related activity.

## Advocacy – State

2024 was one of the most challenging years to date in terms of the sheer amount of legislation introduced at the state level that could impact flexible packaging. FPA monitored a total of 516 bills that could affect our members. Despite these headwinds, FPA was the first national trade association to support the Minnesota EPR bill enacted in 2024, which FPA hopes will serve as the model for well-designed EPR in other states going forward.



### Extended Producer Responsibility (EPR)

At the state level, 42 EPR-related bills in 11 states were introduced in 2024, and FPA's staff remained engaged to protect our members' interests. FPA, working with other stakeholders, effectively defeated every problematic EPR bill introduced in 2024 and made enough progress in Minnesota to become the first of many trade associations to switch from "oppose" to "full support" on the only EPR initiative to become law in 2024. Some notable bills below:

- Minnesota EPR Law: Initially, FPA opposed SF 3561 because the needs assessment was overridden by arbitrary goals set in legislation, the

lack of critical goods exemptions, and the entirety of program costs falling on producers. The final version of the bill creates a data-driven program that allows the needs assessment to inform goals set by the Commissioner of the Minnesota Pollution Control Agency. Critical goods like medical devices, food, infant formula, and drugs are now exempt from the program's requirements. While producers still pay most of the program cost, the rest of the waste supply chain will be responsible for 10% of the cost to ensure fiscal responsibility when making investments.



FPA's John Richard, Director, Government Relations, and Dani Diehlmann, Interim Director and VP, Communications, visit Profile Films with the Office of Senator Gary Peters (D-MI)

- New Jersey (S. 3398) committed to a needs assessment but arbitrarily set the source reduction goal for plastic to 25%. The needs assessment did not consider alternative collection infrastructure (like store drop-off programs), did not provide regular exemptions for critical goods, and required producers to pay for the landfilling of materials—paradoxically disincentivizing recycling programs. This bill remained active through the end of 2024 and will still be a priority for FPA in 2025.
- New York (AB 5322B | SB 4246B) sought to establish a far-reaching EPR program for New York. The bills had a producer definition that directly included FPA members, banned advanced recycling, created a patchwork of toxic substance lists, and sought to have producers pay for the entirety of New York's waste management system. The New York EPR effort was the most challenging battle in 2024, with the bill passing the Senate while not making it across the finish line before the Assembly adjourned for the year.
- Michigan (HB 5902) was essentially a clone of the New York EPR bill, with similar producer definitions, toxics provisions, bans on advanced recycling, and an impetus for producers to pay for Michigan's entire recycling system. The bill was held up in Michigan's House Natural Resources, Environment, Tourism, and Outdoor Recreation Committee.
- Washington (HB2049) was defeated early in the year due to an unimplementable producer definition, the lack of antitrust protections for the PRO, and a reimbursement plan that would have paid for all "garbage" that was being collected curbside. We expect EPR legislation to be introduced again in 2025 in the Washington Legislature and we will be actively engaged in any consideration of such legislation.

## Advanced Recycling

FPA believes a suite of solutions is necessary to address the need for more collection, processing, and end markets for flexible packaging circularity. FPA advocates for legislation enabling and funding advanced recycling, including chemical recycling. While 25 states now have laws on the books protecting advanced recycling technologies, we also must be wary of advanced recycling bans.

- Wyoming (SF 90) proactively included advanced recycling in the state definition of recycling in 2024, making it the 25th state to codify advanced recycling into its statute.

## Labeling

FPA opposed state-led labeling frameworks due to interstate commerce issues that unscientific claims can cause for our members and their customers. In 2024, FPA worked to help defeat labeling legislation in New Hampshire, New Jersey, Massachusetts, Virginia, and Washington. FPA also successfully got a problematic labeling bill in Maine turned into a study.

## Toxics

2024 marked a shift in toxics legislation from previous years. In addition to per- and polyfluoroalkyl (PFAS) legislation, the new targets of "toxics" legislation included polyvinyl chloride (PVC) and polyvinylidene chloride (PVDC) and other materials targeted by the U.S. Plastics Pact's Problematic and Unnecessary Materials List.

- California (AB 2761): The Reducing Toxics in Packaging Act would have banned PFAS, PVC, and PVDC in all plastic packaging, potentially making the recycled content requirements set out in SB 54 more challenging. After a hard-fought battle, the FPA and others succeeded in defeating this bill.



- Rhode Island (S2850/H7619): The Toxic Packaging Reduction Act initially banned “intentionally added” PFAS in food packaging by July 31, 2024, and specifically included uses as a processing agent, a mold release agent, or an intermediate as “intentionally added.” FPA changed the final law to push the date for those uses back to July 1, 2027, giving our members more time to get out of PFAS. S2850 and H7619 initially included a poison pill – the addition of PVC and PVDC to the list of banned substances in food packaging, but FPA had them removed. FPA worked with a frequent opponent, Clean Water Action, to make these changes.

### **FlexPAC® – FPA’s Political Action Committee**

In 2024, the FPA incorporated FlexPAC®, a political action committee (PAC) designed to support Members of Congress who are champions for sensible packaging policy. In its inaugural year, FlexPAC® raised approximately \$45,000 from 41 contributors, putting it on track to be a \$100,000 per two-year cycle PAC.

Thank you to our 2024 inaugural contributors:

- Evan Arnold, Glenroy, Inc.
- Stan Bikulege, Novolex
- Kathy Bolhous, Charter Next Generation
- Sean Bowie, Bryce Corporation
- Alana Carr, Hosokawa Alpine American, Inc.
- Mike Cormier, Garlock Flexibles
- Dani Diehlmann, Flexible Packaging Association
- Dhuanne Dodrill, PAXXUS, Inc.
- Doug Dodrill, PAXXUS, Inc.
- Kasie Fairbarn, Windmoeller & Hoelscher Corporation
- Kenneth Fontaine, AMGRAPH Packaging, Inc.
- Bob Gargione, Pregis
- Elsie Genova, Poly Print, Inc.
- Joe Genova, Poly Print, Inc.



FPA's John Richard, Director, Government Relations visits Berry Global with the Office of Senator Rand Paul (R-KY)

- David Goch, Webster, Chamberlain and Bean, LLP
- Alex Gonzalez, Sonoco Flexible Packaging
- Russell Grissett, Sonoco Flexible Packaging
- Bill Gross, PPC Flex
- Weston Harcourt, Sonoco Flexible Packaging
- Bill Jackson, Amcor Flexibles
- Rosie Jaipaul, Dynamic Solutions Unlimited LLC
- Pallavi Joyappa, Emerald Packaging, Inc.
- Katie Juehring, Glenroy, Inc.
- Alison Keane, Flexible Packaging Association
- Kevin Kelly, Emerald Packaging, Inc.
- Kevin Keneally, PPC Flex
- Kelly Knowles, AllCourt Public Affairs
- Shea Logan, Novolex
- David Love, Printpack
- Windell McGill, Paper Converting Machine Company
- David Nunes, Hosokawa Alpine American, Inc.
- Jason Obrecht, PAXXUS, Inc.
- Greg Powell, Garlock Flexibles
- Amy Presher, Profol
- John Richard, Flexible Packaging Association
- James Rooney, DazPak Flexible Packaging
- Sam Schlaich, Novolex
- Apurva Shah, Charter Next Generation
- Rex Varn, Accredo Packaging Inc.
- Andrew Wheeler, Windmoeller & Hoelscher Corporation
- John Wilson, UBE America Inc.



FPA visits Berry Global with the Office of Congressman Derrick Van Orden

## Environmental, Health, and Safety (EHS) Committee

As the voice of the flexible packaging industry, FPA works with regulators at the EPA, the U.S. Occupational Safety and Health Administration (OSHA), and other U.S. regulatory agencies such as the Federal Trade Commission (FTC) and U.S. Food and Drug Administration (FDA) to share industry positions and mitigate potential regulatory burdens on flexible packaging manufacturing in the United States.

FPA's Environmental, Health, and Safety (EHS) Committee also tracks regulatory developments across these agencies to inform FPA's members on upcoming and existing environmental compliance issues and policies. Cindy Haven of ProAmpac and Rob Harmon of Amcor Flexibles co-chaired the Committee, and FPA's outside counsel, Leslie Ritts, advised the group.



The EHS Committee meets three to four times a year, and also convenes numerous Teams™ meetings throughout the year on significant regulatory developments, calls with agency officials, and the submission of written comments on government regulations and guidance.

FPA also posts an *Environmental Index*, updated quarterly, which discusses all environmental regulations and judicial decisions affecting FPA plants. It is available to all FPA members' environmental managers and can be searched by topic to provide ready access to materials and agency tools on current regulations. The Committee also posts PowerPoint presentations prepared by outside counsel on current environmental topics in the Member's Only section of the FPA website.

### Trump Administration's Deregulatory Activities

The EHS Committee had a particularly full plate participating in OSHA and EPA regulatory initiatives throughout 2024, monitoring the likely impact of the

Trump Administration's anticipated deregulatory activities on the industry starting in 2025. In addition to understanding the nuts and bolts of complying with air, hazardous waste, worker safety, and toxics regulations at members' manufacturing facilities, the Committee also grappled with a cascade of "hot" regulatory policy issues, including OSHA's long-awaited proposed heat standard, on which the Committee filed lengthy comments.

Highlights of the EHS Committee's work in 2024 not only centered on facility regulatory activity but national strategy, including:

### Per-and polyfluoroalkyl (PFAS)

EPA regulatory actions on PFAS, including bans of certain PFAS under the Toxic Substances Control Act, Toxic Release Inventory Reporting requirements, labeling, environmental justice initiatives, hazardous waste laws, and promulgation of a four parts-per-trillion PFAS drinking water standard.



FPA's John Richard, Director, Government Relations, visits Admiral Packaging, Inc. with the Office of Congressman Gabe Amo

## Refrigerants

Implementation of the “phase out” by 2030 of hydrofluorocarbon (HFC) refrigerants for industrial processes such as chillers on extrusion lines and air conditioning, and sulfur hexafluoride for circuit breakers, in which SF6 under pressure is used to extinguish the electric arc on printing lines. The Committee also monitored the availability of “climate-friendly” substitutes under EPA’s SNAP (Significant New Alternative Policy). HFCs have tens-of-thousands of times the Greenhouse Gas Intensity (GHI) of carbon dioxide, and by law, new chillers that are installed this year may no longer use HFCs and must adhere to EPA SNAP substitution rules.

## Hazardous Air Pollutants Reporting

EPA’s air pollutant reporting requirements and developments concerning the use of company data for cumulative risk assessments on environmental justice communities within ten miles of plants (which the Trump Administration has now withdrawn). FPA submitted extensive comments on problems with the proposed regulation, and last spring EPA officials joined the EHS Committee by phone to discuss their prospective applicability. Had the final rule not been withdrawn, it would have cost FPA members and most of the industry a great deal of effort to implement.

## EPA “Mapping” Tools

Staying abreast of EPA “mapping” tools for regulators and the public to assess the risk of pollutants emitted from a plant on neighboring communities. The best-known of these EPA mapping tools is called EJ Screen (EJSCREEN: Environmental Justice Screening and Mapping Tool), and a lesser-known one is called NEXUS, which is a cumulative air pollution risk tool that maps clusters of industrial facilities to assess their impact on health and the environment. Enter the name and location of a plant—or easier still, open the EJ map on EPA’s website, find your state, and click on a plant’s general location, and EJ the screen will pop up all its emissions (and other reported water, waste and toxics), and perform a risk assessment.

## OSHA Rulemaking Activities

Monitoring OSHA’s many rulemaking activities, including its anticipated lock-out/tag-out rules, personal protective equipment (PPE) fit-testing protocols, and anticipated revisions to its Process Safety Management (PSM) rules.

## The Chevron Doctrine Rejection and How It May Affect Both EPA and OSHA Regulations

In *Loper Bright Enterprises v. Raimondo*, the Supreme Court struck down, as unconstitutional, the 40-year-old “Chevron Doctrine.” It required the judiciary to defer to reasonable interpretations of agency officials in the Executive Branch agencies to interpret federal laws based on their scientific and subject matter expertise. The facts of the Supreme Court’s 2004 decision in *Chevron USA v. Natural Resources Defense Council* and its 2024 decision in *Loper Bright* are not really relevant, except that Chevron involved EPA’s interpretation of the federal Clean Air Act and *Loper Bright* involved the National Marine Fisheries Service’s interpretation of the Stevenson-Magnuson Act. The point to ponder is whether the President and federal agencies have the power to remake federal agencies as they would like, if the Courts are no longer able to defer to the Executive Branch’s interpretations of federal law, and whether *Loper Bright* will concentrate too much power in the Judicial Branch to interpret Congressionally-enacted law, enabling judges—not the President and the Executive Branch—to interpret the laws it administers.

Heading into 2025, it is anticipated that newly elected President Trump will attempt to repeal, revise, and rewrite many laws, including environmental laws for approving the country’s infrastructure and laws for protecting workers. While federal agencies and courts grapple with how to implement the *Loper Bright* decision, be aware that it likely will create additional uncertainty and economic burden on FPA members—and the regulated industry at large—to apply those regulations.





In 2024, FPA built upon the success of its first Congressional fly-in in Washington, D.C. in 2023 with expanded programming and requests for member site visits. In 2025, past ELC participants will be leading a broader fly-in open to all of FPA's membership.



FPA's Sterilization Packaging Manufacturers Council (SPMC) is comprised of FPA member companies that are industry experts in the unique production requirements of sterile medical and pharmaceutical packaging. Representatives from SPMC's member companies volunteer their time, resources, and technical expertise to provide packaging requirement guidance, test methodology clarity, standards development, and user education. Dhuanne Dodrill, President & CEO of PAXXUS, Inc., served as Chair of the SPMC in 2024. The Council is supported by three key committees: the Technical Committee, the Marketing Committee, and the Regulatory, Standards, and Sustainability Committee.

SPMC also released a new white paper, "Preformed Sterile Barrier Systems Storage and Handling." The document offers recommendations and best practices for the storage of preformed sterile barrier systems prior to their use by a medical device manufacturer or contract packaging manufacturer.

The SPMC celebrated its fourth annual Sterile Packaging Day on February 7, 2024. The event was founded by the council to raise awareness for the role sterile packaging plays in everyone's health and well-being. The celebration theme of "Opening Possibilities" was developed by the SPMC to salute the nurses and medical professionals who administer routine care as well as life-saving procedures with the help of sterilized medical and pharmaceutical packaging.

Sterile Packaging Day was celebrated in person at Medical Design & Manufacturing (MD&M) West in Anaheim, California, where the SPMC held a blood drive in partnership with show organizer Informa and the American Red Cross. To bolster blood donors' wellness and stamina, the council distributed iron-rich snacks in sterile pouches.



In 2024, the SPMC achieved a new milestone — the publication of its first position paper. "Sustainability of Medical Device Packaging" outlines how and why laws mandating that sterilized medical packaging include recycled content and/or be recyclable pose significant risks to the critical requirements that medical packaging must meet. The paper also offers a path forward with respect to recyclability by encouraging legislators to recognize advanced recycling technologies.





The event was also celebrated virtually on LinkedIn. SPMC provided free downloadable graphics saluting nurses and encouraged those celebrating Sterile Packaging Day to recognize and thank nurses in their communities through social media tributes. Many posted notes of gratitude and admiration for their healthcare colleagues and friends. Sterile Packaging Day will be celebrated again in 2025 on February 5th.

### SPMC Members

- Amcor Flexibles
- Beacon Converters, Inc.
- Berry Global
- Charter Next Generation
- DuPont Tyvek®
- PAXXUS, Inc.
- PPC Flex
- Printpack Medical
- SteriPax
- Technipaq, Inc.
- Vonco Products, LLC
- Winpak Ltd.





The Emerging Leadership Council's (ELC) mission is to establish a network of leaders to drive issues and opportunities that have a long-term impact on advancing the U.S. flexible packaging industry. The strategic goals of the committee include the following:

### Advocate and Protect

Advocate for the flexible packaging industry by working with lawmakers and promoting responsible packaging that supports circular economy principles.

### Education

Develop resources to empower FPA member companies to effectively educate families and communities about the benefits of flexible packaging.

### Recruitment & Leadership Development

Recruit, retain, and develop a pipeline of future leaders for the flexible packaging industry.

## Advocacy

### Advocacy on the Hill

In June 2024, FPA hosted its second ELC Washington, D.C. fly-in that included a core group of ELC members, FPA staff, and local lobbyists. Fly-ins offer a unique opportunity to make many connections and shift perceptions in a few days. The core intent is to provide legislators with a perspective on the flexible packaging industry.

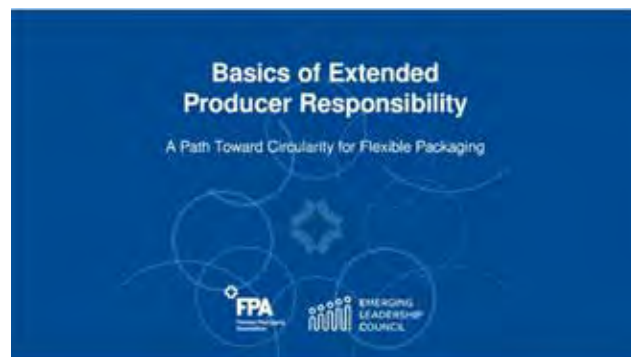
This fly-in aimed to establish and build upon relationships between FPA member companies and their congressional representatives so that they could serve as a resource for their offices when drafting or analyzing legislation that would impact our industry. Some issues discussed were a potential Federal labeling for recyclability bill, workforce and supply

chain issues, advanced recycling, EPR, and overly burdensome legislation that picks winners and losers. The event was successful and helped open new dialogues with several congressional offices along with member companies being requested for input on proposed legislation.

In addition to the fly-in, the ELC assisted with coordinating site visits at multiple converter facilities in 2024, giving legislators a first-hand look at our industry and how flexible packaging is produced.

## Education

The ELC Education Committee strives to combat the negative stigma that surrounds the plastics industry by building a strong foundation of educational materials that highlight the importance, benefits, and need for flexible packaging. In 2024, the FPA and the ELC collaborated to:



- Release a video explaining extended producer responsibility (EPR) and the path toward circularity for flexible packaging. The video can be found on FlexPack.org's Advocacy and Outreach Materials web pages and PerfectPackaging.org. It was also featured in the July/August edition of *FlexPack VOICE*® and shared with members of Congress at the 2024 fly-in in Washington, D.C.





- Continue the “Let’s Talk Flexible Packaging” campaign to launch the interactive “Test Your Knowledge” section on PerfectPackaging.org where Mr. FlexPack tests visitors’ knowledge of the impact flexible packaging has on the environment. Activities include a myth-busting fact or fiction game, a sustainability key terms quiz, and an interactive “how to recycle” game where visitors drag and drop items into the correct recycling bins.



- The interactive drag-and-drop game debuted at SNAC International’s SNX 2024 event in March 2024 and reappeared at the NSCL Legislative Summit in August 2024 and PACK EXPO International in November 2024.



- Launch a new campaign that amplifies the beneficial impact flexible packaging has on the environment, inspires consumer behavior changes, and shows the industry’s commitment to continually paving the way to protecting the planet. The campaign debuted in April to coincide with Earth Month. It included a combination of social posts, influencer collaborations, media outreach, as well as newly developed explainer videos focused on how flexible packaging is:
  - Environmentally Preferable
  - Sustainable
  - Recyclable
  - Perfect Packaging – Full Circularity is Key

All videos can be viewed on LinkedIn @flexiblepackaging-association and @emergingleadership-council.

## Recruitment & Leadership Development

### Speaker Series

The ELC hosted a free webinar speaker series focused on leadership development. Initially targeted for all ELC members, we opened it up to the FPA membership at large. The speakers for 2024 featured Kim Carswell, Advisor for the Sustainable Packaging Coalition Navigate Program, Linda Roman, Associate Director of Packaging at The Kraft Heinz Company, and Dhuanne Dodrill, President & CEO of PAXXUS, Inc.

### Virtual Summer Internship Program

Returning in 2024, the ELC hosted the Virtual Summer Internship Program, continuing its mission to build community and provide valuable networking opportunities for interns exploring careers in the flexible packaging industry.

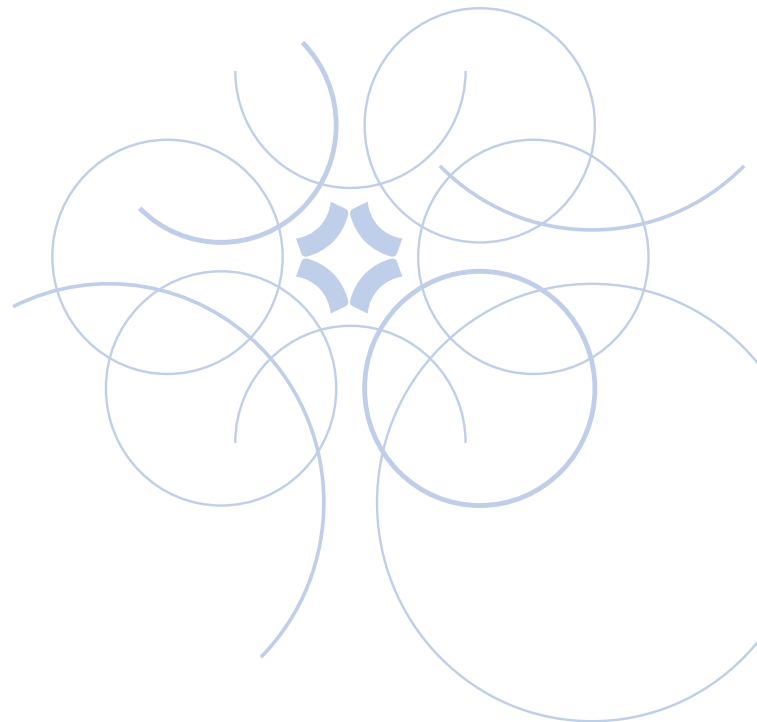


The 2024 program welcomed over 35 student participants from FPA member companies. Throughout the summer, interns engaged in weekly sessions designed to foster connection, industry insight, and professional development. These sessions were structured in two formats: small group discussions and broader group presentations.

Small group sessions, led by members of the ELC, offered interns a more personal setting to network and explore industry topics in depth.

Broader group sessions featured high-impact guest speakers and sessions, including:

- A Kick-off and Introduction to the FPA;
- A Summer Internship Career Panel;
- Special presentations by Kim Carswell, Advisor for the Sustainable Packaging Coalition Navigate Program, and Linda Roman, Associate Director of Packaging at The Kraft Heinz Company.





### FlexPack Crash Course @PACK EXPO International

The FPA and its ELC returned to PACK EXPO International with the FlexPack Crash Course featuring 14 speakers and networking opportunities. This event is designed for new hires and newcomers to the flexible packaging industry with fewer than five years of industry experience.

Content consisted of classroom presentations covering the spectrum of raw materials, to printing and converting, sustainability, and an expo floor field trip to learn more on the form fill seal process. The day wrapped up with a networking social event for participants and ELC members.







# COMMUNICATIONS

FPA continuously promotes the positive story of innovation and the advantages of flexible packaging. We apply a full range of traditional and digital tools to connect with members, media, consumers, policymakers, and other audiences.

## **The Role of Flexible Packaging in Reducing Food Waste: Organizations, Goals, Case Studies and Insights and Opportunities for Flexible Packaging**

FPA partnered with PTIS, LLC to update FPA's previous food waste report from 2014 to provide new insights and opportunities on how flexible packaging can help reduce food waste. The findings were presented at the 2024 FlexForward® Conference, and the report identifies and documents how flexible packaging's unique characteristics lead to reduced food waste during distribution, at retail, and by the customer. The revised report is available on the FPA website, [FlexPack.org](https://flexpack.org).

## **FPA Webinars**

FPA and Euromonitor International hosted a webinar on October 23, 2024, to provide an overview of FPA's Flexible Packaging Market Tracker, an online market research tool providing international market data and insights across 20 markets worldwide, including the U.S., and five packaging industry sectors, including beauty & personal care, beverages, dog & cat food, packaged food, and home care. Insights include key trends on packaging formats, materials and preferences, packaging legislation, recycling and environment, packaging design, and labeling for countries where members do business.

## **Online Conversations Overview**

This bi-annual report, prepared for FPA by The Cyphers Agency, provides information on online news conversations and social media relating to flexible packaging. The report features and provides insights into some of the most relevant and high-visibility coverage in six overarching topical categories including: FPA News—all coverage that mentions “Flexible Packaging Association,” including pickups of FPA-issued press releases; Packaging Innovation—covering the current or future development of new packaging, whether labeled as “flexible” or “sustainable,” by specific brands or industry sectors; Sustainability Initiatives—includes coverage of brands announced or in-progress pro-environment efforts or policies, as well as “sustainability” in general; Challenges/Research—coverage of environmental and/or human effects of plastics/plastic pollution, recycling rates, and professional research/reports; Public Policy—covering the development, implementation, and/or results of governmental entities’ plastic-related actions; and NGO/Citizen Activism—coverage of individuals’ or groups’ attempts to raise awareness of and/or effect change in plastic- or packaging-related areas.

The volume of coverage in all topical categories during July-December 2024 saw a substantial decrease from the first half of the year, from 587 to 254, returning to the normal range after a first-half spike in articles due to the recent CEO change and launch of FlexPAC® with most of the coverage focused on FPA news (65%).

## Ongoing Membership Communications

### FPA Flexible Packaging Industry News Bulletin (INB)

The bulletin is emailed to FPA members weekly (every Monday). FPA sends the INB out through a third-party email service that allows us to track the number of “opens” by members. Other information can be tracked as requested.

### FPA NOW (News on the Web)

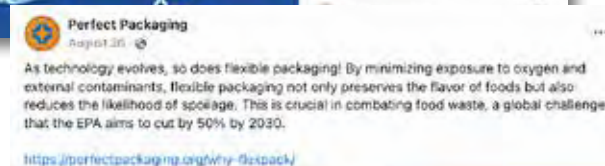
FPA NOW is a monthly bulletin that highlights FPA activities and contains industry trade press articles on trends in packaging and sustainability.

### Social Media Program

Consumer-facing channels, Facebook and Instagram, maintained a healthy audience to promote Perfect Packaging, growing six percent in 2024 to 38,598 total followers. Both channels skew toward a female audience, 77.4% on Facebook and 52.4% on Instagram, aged 25-44. Engagement continues to be generally neutral, with most seeking more information about flexible packaging. The top-performing posts include those with bite-sized infographics and pro-planet messaging.

LinkedIn and X continue to organically gain a strong audience of 28,795 followers, a 15.3% increase in 2024. The most engaged content continues to focus on industry-related news, trends, and FPA updates/announcements. The best-performing content includes member achievements and technical innovations, industry news, and content that focuses on individuals in the flexible packaging industry.

In 2024, FPA remained focused on promoting the recyclability of plastic film and flexible packaging and educating consumers about what can and cannot be recycled and how to recycle the material properly. The content was also expanded to include insights from FPA's life cycle assessments, highlighting the sustainability benefits of flexible packaging, including reduced use of raw materials, water, and energy, and lower greenhouse gas emissions.



# COMMUNICATIONS

## #EverydayIsEarthDay Pro Planet Campaign

In 2024, FPA partnered with its Emerging Leadership Council's (ELC) education committee to launch a new campaign that amplified the beneficial impact flexible packaging has on the environment, inspires consumer behavior changes, and shows the industry's commitment to continually paving the way to protecting the planet.

Through a robust series of posts, the ProPlanet campaign, #EverydayIsEarthDay, highlighted the critical role flexible packaging contributes to food and medical health safety, the reduction of food waste and its impact on our carbon footprint, and the work the industry is doing to achieve full circularity.

The campaign debuted in April to coincide with Earth Month and included social posts, explainer videos, influencer collaborations, and media outreach. As of December 31, the campaign included 120 posts across Facebook, Instagram, LinkedIn, and X, generating over 110,000 impressions and 3,448 engagements. Proactive industry pitching to industry and consumer media outlets resulted in quotes being featured in *American Recycler*, *Paper, Film & Foil Converter*, and *The Food Institute*. The campaign also secured a featured article in *Medium* titled "Closing the Loop: John Richard of Flexible Packaging Association on Embracing the Circular Economy."





## Basics of Extended Producer Responsibility (EPR) Campaign

The FPA is committed to educating audiences about extended producer responsibility (EPR) for packaging. To achieve this, the FPA collaborated with its ELC to create a video explaining EPR and its role in promoting circularity in flexible packaging. Following the video, ten shorter videos, each focusing on different aspects of EPR, were produced and promoted on FPA's social channels.



## "Let's Talk Flexible Packaging" Test Your Knowledge Campaign

In 2024, Mr. FlexPack continued his quest to test consumer and industry knowledge about flexible packaging and its environmental impact. In addition to the myth-busting fact or fiction game and key sustainability terms quiz, FPA launched an interactive "how to recycle" game where users drag and drop items into the correct recycling bins. The interactive drag-and-drop game made its successful debut at SNAC International's SNX 2024 event in March 2024 and reappeared at the NSCL Legislative Summit in August 2024 and PACK EXPO International in November 2024.

In addition to industry event appearances, the Test Your Knowledge campaign was showcased on FPA's social channels and reached just over 4,000 impressions with 141 engagements through Facebook and Instagram.



## Influencer Outreach Program

In 2024, FPA remained focused on promoting the recyclability of plastic film and educating consumers about what can and cannot be recycled, as well as how to properly recycle the material. Through lifestyle and environmentally conscious influencers, including Ashley Renne Nsonwu, Kystalynn Gier, Jessica Purcell, and Jen Panaro, outreach in 2024 reached approximately 375,000 followers, with upwards of 74,000 engagements through Instagram and TikTok.



FPA will continue its “What is Recyclable” messaging in 2025, focused on educating consumers about which flexible packaging materials are recyclable. Additionally, FPA will emphasize how flexible packaging is pro-planet and can help reduce food waste by extending the shelf life of products, protecting them from damage, and providing convenience in portion control.





### FlexPack VOICE®

FPA continued its partnership in 2024 with the YGS Group to develop and distribute our official magazine, *FlexPack VOICE*®. The magazine, published every other month and distributed to over 4,700 individuals, includes news specific to FPA,

news focusing on the flexible packaging industry, the supply chain, and member achievements in sustainable, flexible packaging and technical innovations that address product protection, e-commerce, food waste, medical safety, and more.

Five feature sections anchor the issues: “Advocacy Corner,” which describes FPA’s advocacy efforts and what it is doing to be heard at the federal and state levels to advance members’ interests; “FlexAppeal®,” which highlights the benefits of flexible packaging; “FlexForward®,” which focuses on industry breakthroughs and trends; and “FlexFocus®,” which features FPA members’ specific achievements in flexible packaging. In 2024, FPA brought back the feature that highlights some of the important charitable work that FPA companies do in their communities while offering space to note new hires in senior-level positions. In 2024, the digital edition of *FlexPack VOICE*® earned 33,331 views.







## FPA Magazine Website

**FlexPack VOICE.com** is a dedicated website for *FlexPack VOICE*®, FPA's magazine. It includes digital copies of the magazine; additional original articles; breaking news (a curated news feed from the e-newsletters); follow-up and expanded coverage of select articles from the print publication; video and/or audio; additional photo galleries to complement the magazine content such as FlexAppeal®; key upcoming events; and a social media feed. In 2024, the site earned 36K+ page views, with top-read articles including "ProAmpac CEO Intends to Double Sales Within Five Years" (1,268 views), "*FlexPack VOICE*® Gallery" (518 views), and "Hosokawa Alpine American Announces Installation of (3) Production Scale Blown Film Lines at the Shell Polymers Test Center (466 views).

## FPA Website

**FlexPack.org** continues to provide members and guests primary access to information on the association and the flexible packaging industry. In 2024, the site garnered 177K+ page views. The top visited pages on the website include the Membership Directory (23,000+ views), FPA events calendar (10,500+ views), FPA Press Room (8,500+ views), FPA's 2024 Annual Meeting event page (6,000+ views), the FlexForward® Conference event page (4,700+ views), the industry overview (4,500+ views), the Buyer's Guide (3,800+ views), and facts and figures (2,500+ views).

## FPA Consumer Website

**PerfectPackaging.org**, FPA's consumer-facing microsite, promotes the industry to consumers and addresses miscommunication about flexible packaging and plastics that are often reported. The website continues gaining momentum and consumer interest, with most seeking information on recycling options, the impact of flexible packaging on the environment, and the reasons to consider flexible packaging.



In 2024, the site earned 49K+ page views with the Environmental Impact of Plastic vs. Paper blog (7,551 views) and What is Flexible Packaging page (6,581 views) continuing to be the top-visited pages.

## FPA Careers Website

Flexible packaging is one of the fastest-growing packaging industry segments, with nearly \$43 billion in annual U.S. sales. Approximately 83,000 people are employed by the industry across America, and we need more talented, ambitious professionals for a wide range of disciplines. To help with this workforce development, FPA developed a career website, **FlexPackCareers.org**, that outlines the various career opportunities in the flexible packaging industry and includes links to FPA member websites and career pages (if applicable). In 2024, the website garnered 39,471 views.

## FPA Trade Show/Conference Participation

FPA actively serves as a thought leader for the flexible packaging industry and represented the industry at various trade shows and conferences throughout 2024.



FPA President & CEO, **Dan Felton**, shares a state of the industry policy update with PACK EXPO International attendees



Students attending PACK EXPO International tested their flexible packaging knowledge with our Recycling Knowledge Game



SNX - FPA's Director of Membership and Meetings, Emily Patten, discusses flexible packaging knowledge while attending SNX24

## FPA representatives presented at the following conferences/events:

- AMI's Stretch and Shrink Film, December 2-4, 2024
- PACK EXPO International, November 3-6, 2024
- Tokyo Pack 2024, October 23-25, 2024
- Rutgers Packaging Engineering Career Event, October 1, 2024
- NOVA Chemicals Brand Owner Bootcamp, September 10-12, 2024
- PLASTICS Recycling Open House, August 21, 2024
- Packaging Program Council, August 9, 2024
- Flexible Packaging Europe Meeting, June 20-21, 2024
- Global Pouch Forum, May 29-31, 2024
- NPE 2024, May 6-10, 2024

- PCMC Open House, April 23-24, 2024
- TAPPI FlexPack PLACE Conference, April 14-17, 2024
- FPA Annual Meeting, March 20-22, 2024
- ISPA Expo, March 12-14, 2024
- SPE International Polyolefins Conference, February 18-24, 2024
- Comexi's Miami Technological Center Grand Opening, January 25, 2024

## FPA exhibited at the following trade shows in 2024:

- PACK EXPO International, November 3-6, 2024
- NCSL Legislative Summit, August 5-7, 2024
- SNX, April 14-16, 2024
- MD&M West, February 6-8, 2024



FPA staff at PACK EXPO International. From left to right: John Richard, Dani Diehlmann, Dan Felton, Lily Sevin, and Emily Patten



## Flexible Packaging Achievement Awards Competition

FPA announced the winners of its 68th Annual Flexible Packaging Achievement Awards Competition, which features flexible packaging solutions that meet expectations and needs through advancements in materials, graphics, structure, new uses, extended shelf life, and sustainability. The 2024 awards announcement was held at FPA's Annual Meeting on March 20, 2024.

In 2024, FPA received 106 packages submitted to the competition, with a total of 332 entries (some packages were entered into multiple categories). 22 flexible packages were honored with 36 Flexible Packaging Achievement Awards in various categories.

The competition's focus on new technologies, processes, printing techniques, and sustainability of flexible packaging places the Achievement Awards program in a class by itself.

Special thanks to the 2024 competition judging panel: Danny Beard, president of Packaging Specialists; Chelsey Quick, vice president of client success, Industry Intelligence Inc.; and Dr. Bruce Welt, professor of packaging engineering, University of Florida.

## Highest Achievement Award

### WD-40 Specialist® EZ-Pods Pouch Family

Gold – Expanding the Use of Flexible Packaging

Gold – Packaging Excellence

Gold – Sustainability

Gold – Technical Innovation

Manufacturer: Brook + Whittle

[brookandwhittle.com](http://brookandwhittle.com)



## Gold Achievement Awards

### Certified-Circular Content Pet Food Package

Gold – Sustainability

Manufacturers: Berry Global, Peel Plastic Products Ltd., and Hill's Pet Nutrition

[berryglobal.com](http://berryglobal.com),  
[peelplastics.com](http://peelplastics.com), and  
[hillspet.com](http://hillspet.com)



### Dual Function Frozen Yogurt Package

Gold – Technical Innovation

Silver – Expanding the Use of Flexible Packaging

Silver – Packaging Excellence

Manufacturers: Gualapack and Amcor Flexibles

[gualapackgroup.com](http://gualapackgroup.com) and [amcor.com](http://amcor.com)



### Gulf Coast Sawyer® Pouch

Gold – Expanding the Use of Flexible Packaging

Manufacturer: PPC Flex

[ppcflex.com](http://ppcflex.com)



### Horayra Cat Food, 14kg

Gold – Printing

Silver – Shelf Impact

Silver – Technical Innovation

Manufacturer: Emirates Printing Press, L.L.C.

[eppdubai.com](http://eppdubai.com)



### Hunter's® Gourmet Smoky Tandoori, 125g

Gold – Shelf Impact

Manufacturer: Emirates Printing Press, L.L.C.

[eppdubai.com](http://eppdubai.com)



### McCoy™ Dunnage Free IBC Liners for Bulk Liquid Aseptic Products

Gold – Sustainability

Silver – Expanding the Use of Flexible Packaging

Silver – Technical Innovation

Manufacturer: Amcor Flexibles

[amcor.com](http://amcor.com)





### Perfect Balance Dog Food

Gold – Shelf Impact

Manufacturer: TC Transcontinental Packaging  
[tctranscontinental.com/en-us/packaging](https://tctranscontinental.com/en-us/packaging)



### RoadRescue® Asphalt Repair, 50 lbs.

Gold – Expanding the Use of Flexible Packaging

Manufacturer: Polymerall Flexible Packaging  
[polymerall.com](https://polymerall.com)



### Shehrazade Basmati Rice Blue Pouch, 5kg

Gold – Packaging Excellence

Gold – Printing

Gold – Shelf Impact

Gold – Technical Innovation

Manufacturer: Emirates Printing Press, L.L.C.  
[eppdubai.com](https://eppdubai.com)



### Voyager™ Dog Food Co. Clean & Complete Wholesome Recipe

Gold – Printing

Gold – Shelf Impact

Manufacturer: TC Transcontinental Packaging  
[tctranscontinental.com/en-us/packaging](https://tctranscontinental.com/en-us/packaging)



## Silver Achievement Awards

### Amcor HealthCare™ AmSky™ Recycle Ready Blister Packaging System

Silver – Sustainability

Manufacturer: Amcor Flexibles  
[amcor.com](https://amcor.com)



### Earth To Malibu Sachet

Silver – Shelf Impact

Manufacturer: Nosco  
[nosco.com](https://nosco.com)



## Hunter's® Gourmet Foie Gras, 125g

Silver – Printing

Manufacturer: Emirates Printing Press, L.L.C.

[eppdubai.com](http://eppdubai.com)



## KitKat® Mini Moments

Silver – Shelf Impact

Manufacturer: Emirates Printing Press, L.L.C.

[eppdubai.com](http://eppdubai.com)



## Koochikoo® Lovely Yellow Lemon, Lolly Pop Rainbow, and Cool Mint Treat, 60g

Silver – Printing

Manufacturer: Paharpur 3P

[paharpur3p.com](http://paharpur3p.com)



## Liquid I.V.® Hydration Multiplier® Mocktail Edition

Silver – Shelf Impact

Manufacturer: PPC Flex

[ppcflex.com](http://ppcflex.com)



## Omega-3 Deluxe Mix Recyclable Bag, 26 oz.

Silver – Technical Innovation

Manufacturer: Emirates Printing Press, L.L.C.

[eppdubai.com](http://eppdubai.com)



## Premium Turkish Coffee Mood, Dark Roast, 250g

Silver – Printing

Manufacturer: Emirates Printing Press, L.L.C.

[eppdubai.com](http://eppdubai.com)



## StreamTwo® Pouch Recycle Ready All HDPE Packaging

Silver – Technical Innovation

Manufacturer: PAXXUS, Inc.

[paxxus.com](http://paxxus.com)





### Tyson Foods Foam Tray Replacement with Forming/Nonforming Film from Amcor

Silver – Sustainability

Manufacturer: Amcor Flexibles

[amcor.com](https://amcor.com)



### US Waffle™ Jus-Rol™ Poffitz Club Pack with Sealstrip's SealAcross® Reseal

Silver – Expanding the Use of Flexible Packaging

Silver – Packaging Excellence

Manufacturer: Sealstrip Corporation

[sealstrip.com](https://sealstrip.com)



## Flexible Packaging Student Design Challenge

The 2024 Student Flexible Packaging Design Challenge, managed and judged by the Emerging Leadership Council (ELC), received 62 concept outlines from some of the top packaging design programs across the United States. From the

concept outlines submitted, 21 were selected to continue to the development phase. 2024 winners were teams of students from the University of Wisconsin – Stout and the California Polytechnic State University.

### First Place Honors

Pringles® Side Opening Pouch

Student Team: Starr Gong and Logan Searles

School: University of Wisconsin – Stout

Professor: Xiaojing “Kate” Liu, Assistant Professor



### Second Place Honors

Sizzle Sleeves

Student Team: Garrett Foster, Haaken Pedersen, and Clorinda Webb

School: California Polytechnic State University

Professor: Joongmin Shin, PhD, Associate Professor



The Flexible Packaging Association (FPA) maintains industry statistics and updates reports as data changes. Thus, evaluating detailed long-term consistency by FPA is ongoing. Industry information is collected from the U.S. Departments of Labor and Commerce, the U.S. Census Bureau, the U.S. Bureau of Economic Analysis, industry analysts, investment banking reports, the economic analyst group Inforum, and other authoritative sources to provide a more complete and insightful picture of the U.S. flexible packaging industry.

## Annual State of the U.S. Flexible Packaging Industry Survey/Report (SOI)

FPA's annual SOI is a definitive data source and information utilized by industry converters, suppliers, investors, and analysts. The report examines several aspects of the U.S. flexible packaging industry, including sales and utilization levels, current profit trends, capital spending plans, industry M&A activity, projected growth areas, U.S. imports and exports, and end-use application information.

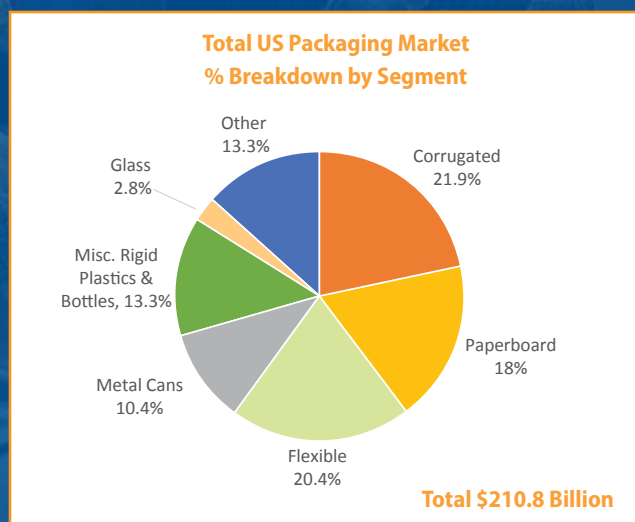
The U.S. flexible packaging industry was projected at \$42.9 billion in annual sales for 2023, up from \$41.5 billion in 2022, for a growth rate of 3.3%. Flexible packaging has grown steadily, including packaging for retail and institutional food and non-food, medical and pharmaceutical, industrial materials, shrink and stretch films, retail shopping bags, consumer storage bags, and wrap and trash bags, and is projected to continue to grow.

Flexible packaging represents 20.4% of the total \$210.8 billion U.S. packaging industry and is the second-largest packaging segment behind corrugated paper, representing 21.9% of the industry. Economic analysis group Inforum estimates that the flexible packaging industry will grow to \$43.8 billion in 2024, for a growth rate of 2.1%. The number from Inforum is slightly more positive than the 1.5% growth that FPA converter companies expect in 2024. Inflation will continue to impact the actual growth rate.

Inforum estimates that the flexible packaging industry will grow to \$47.3 billion by 2028 for a CAGR of 2.0% from 2023-2028. For comparison, a recent report from Grand View Research estimates the global flexible packaging market to experience a CAGR of about 4.7% through 2030.

## Industry Compensation Survey/Report

FPA's compensation survey is conducted every three years unless unprecedented events occur that would impact the employment footprint of the industry. The survey provides information on flexible packaging industry salary levels and hourly rates by company/plant size, region, and primary manufacturing operations. The most recent compensation report was published in 2023 based on 2021 data. The next report will be in 2025 based on 2024 data. The report includes a short executive summary of the key findings, and the aggregate data is presented in a separate Excel file. The report is only available to FPA converter members participating in the corresponding survey.



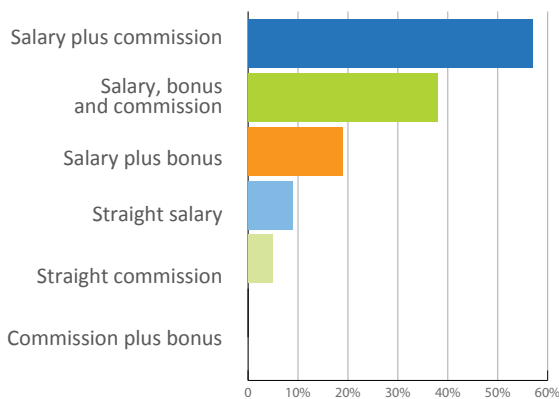
Source: Inforum

According to the most recent report available, the majority of respondents to the survey were large converters with annual net sales of \$100 million or more (39%) or mid-sized converters with annual net sales of \$25-\$99 million (35%). Smaller converters with net yearly sales under \$25 million represented 22% of respondents. Fifty percent of companies consider their primary manufacturing operation to be multi-web converting.

All participating companies indicated they provide short-term disability coverage to hourly and salaried employees. Long-term disability coverage is offered to 100% of salaried and 87% of hourly employees. A prescription drug plan is provided to 96% of salaried and hourly employees.

57% of the participating companies compensate their sales force with a salary plus commission method. At the same time, 38% use a salary, bonus, and commission method, which are the two most popular sales force compensation methods.

#### Sales Force Compensation Method



**Note: Some survey participants used several methods**

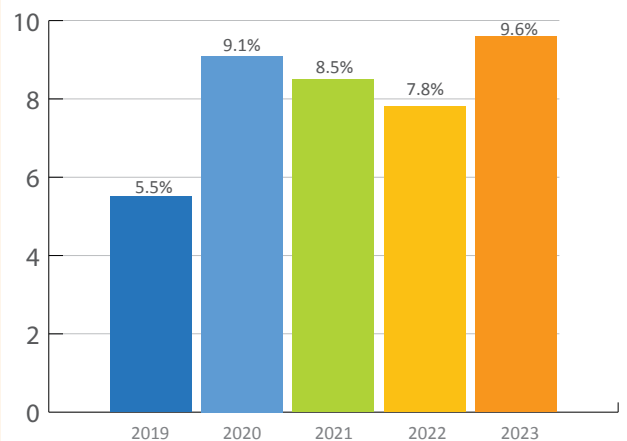
Source: Flexible Packaging Association

#### Annual Cost Earnings Survey/Report

This FPA report is published annually to examine key operating factors, including cost component information on labor, sales, general and administrative expenses, materials and other manufacturing, receivables aging, capital spending, and inventory turnover. It also includes information on asset productivity and profitability performance with year-on-year comparisons.

For the *2023 Cost Earnings Report*, the most recent report available, the 2023 net profit before tax composite results were 9.6%, ahead of the 7.8% reported in 2022. The 2023 results were higher than any of the preceding four years. Results for 2019 were the lowest of the most recent five years, reporting 5.5%. Reported net profit rose 65% from 2019 to 9.1% in 2020 and has since remained relatively stable. The rise in profit margins from 2022 to 2023 appears to be driven by savings in direct labor. "Direct Labor" as a percent of net sales decreased from 9.1% to 8%, while other major expense categories changed far less. "Sales, Admin, and Other" fell marginally from 12.5% to 12.2%; "Other Manufacturing Expenses" rose from 21.9% to 22.9%; and "Materials Used" fell marginally from 49.7% to 49.4%. The *2024 Cost Earnings Report* will be available late in the 4th quarter of 2025. The report is only available to FPA converter members participating in the corresponding survey.

#### Net Profit Before Tax as a Percent of Net Sales, 2019-2023 (% of Sales)

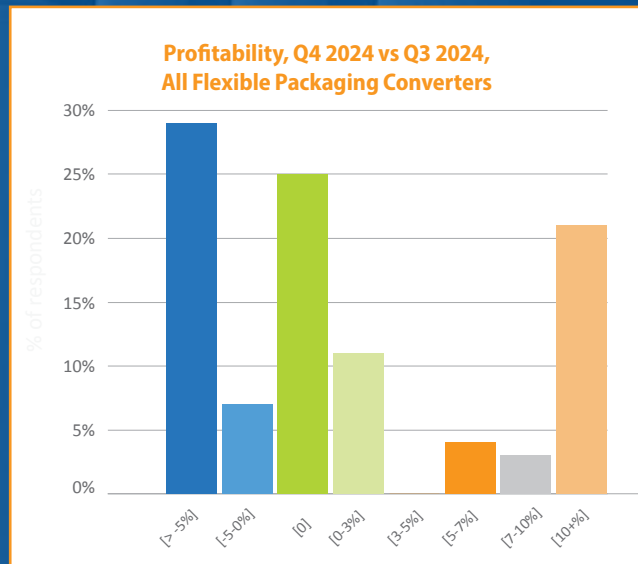


Source: Flexible Packaging Association



## 'Pulse of the Industry' Survey/Report

Published quarterly, FPA's *'Pulse of the Industry'* Report examines industry performance for net sales, profitability, inventory levels, volume, capital spending, and capacity utilization. The most recent report was from the 4th quarter of 2024. When looking at the rates for profitability in Q4 vs. Q3, there was an interesting breakdown among categories with a negative profitability of greater than -5% as the most cited category by 29% of respondents, with a quarter of respondents citing no change, followed by 21% who saw profitability increase by over 10%.



## Annual Polyethylene Market Overview

Prepared exclusively for FPA by Chemical & Polymer Market Consultants (ChemPMC), this report complements the presentation "Polyethylene Market Overview: Thriving in Leaner Times" conducted by Esteban Sagel during FPA's Annual Meeting in Tucson, Arizona, in March 2024.

## Polyolefin Market Overview: A Tale of Two Polymers

Prepared exclusively for FPA by Chemical & Polymer Market Consultants (ChemPMC), this report complements the presentation conducted by Esteban Sagel during FPA's FlexForward® Conference in Charlotte, North Carolina, in September 2024.

## Global Trends in Flexible Packaging, Euromonitor International



FPA partners with Euromonitor International to provide its members with further market data and information. Euromonitor's worldwide database provides current and forecast data on packaging units in all industry segments. FPA takes limited extracts from the intelligence and incorporates the data into new reports or other original material, including the annual SOI report.

FPA and Euromonitor developed the Flexible Packaging Market Tracker, which features 20 key flexible packaging country markets and highlights market dynamics, trends, and opportunities to expand business internationally.

The Market Tracker pulls insights directly from Euromonitor's proprietary data system, known as "Passport," which provides data on industries, economies, and consumers worldwide, helps to analyze market context and identify future trends.

The tracker is a customized research tool available only to FPA members to enhance the FPA website and track and compare flexible packaging

markets around the globe to help members better understand, prioritize, build business cases, and capture global market opportunities for flexible packaging. It enables members to access market information from around the globe on flexible packaging materials and non-flexible markets. It also helps FPA members understand the global packaging landscape, identify new technical packaging development prospects, and pinpoint growth opportunities.

The Market Tracker was last updated in May 2024, and the next update is scheduled to be completed before the end of 2025.

## Industry Intelligence Inc. Supply Chain Report

Due to the unprecedented global supply chain challenges across our industry, FPA is partnering with Industry Intelligence Inc. on the daily *Supply Chain Report* to help keep a pulse on supply chain news and insights. Industry Intelligence produces and sends a custom report to all FPA member companies and contacts focused on technology, future supply chain disruptions, consumer trends, security, sourcing, and the economy. Both FPA and Industry Intelligence believe that access to timely and relevant information is critical in today's business environment.

### International Markets

Click on a country or use the drop-down list to view market data

How to use

Country list



Argentina	Brazil
Canada	China
Colombia	France
Germany	India
Indonesia	Italy
Japan	Mexico
Philippines	Poland
Russia	South Africa
Spain	Turkey
United Kingdom	United States



The FPA hosts two major events each year: the Annual Meeting in the spring and the FlexForward® Conference in the fall.

## Annual Meeting

The FPA 2024 Annual Meeting was held March 20–22 at the Loews Ventana Canyon Ranch in Tucson, Arizona, bringing together 351 industry professionals and their guests for a dynamic mix of education and networking.

The content-rich educational program featured a range of thought leaders, including Rob Cotton, PepsiCo's R&D Director for Foods Packaging and Sustainable Materials, who shared insights on PepsiCo Foods' journey toward recyclable, compostable, biodegradable, or reusable (RCBR) compliance. Heidi Kujawa, CEO of ByFusion Global, Inc., delivered a compelling presentation on building trust with plastic, exploring the idea of transparency as the new bottom line.

FPA President & CEO Alison Keane provided a comprehensive update on the state of the U.S. flexible packaging industry, while Guido Aufdenkamp, Executive Director of Flexible Packaging Europe, offered a perspective on the European market. Additional sessions covered the polyethylene market outlook, strategies for communicating the value of flexible packaging, and updates on FPA's Emerging Leadership Council (ELC) initiatives.

Networking opportunities included an ELC reception, multiple informal gatherings, two luncheons, a golf tournament, and the Welcome & Flexible Packaging Achievement Awards Dinner, which celebrated innovation and excellence by honoring winners of the Annual Achievement Awards Competition.

The 2024 Annual Meeting saw a 3% increase in attendance over the previous year, with a 20% boost in revenue.

Looking ahead, the 2025 Annual Meeting will launch a year-long celebration of FPA's 75th Anniversary. The schedule has been adjusted to feature notable speakers and events, beginning with the Welcome Reception & Dinner and announcing the 2025 Achievement Award Competition Winners during a breakfast on the final day of the Annual Meeting.

## FlexForward® Conference

The 2024 FlexForward® Conference was held September 17–19 in Charlotte, North Carolina, and expanded from a single-day format to a day-and-a-half program to accommodate more robust content and networking opportunities. The event started with a welcome reception at the NASCAR Hall of Fame, setting the stage for an engaging and informative conference.

Attendees heard from Dr. Claire Sand, Senior Associate at PTIS and Principal at Packaging Technology and Research, LLC, who spoke about the critical role of flexible packaging in reducing food waste. Teo Medlin of Procter & Gamble shared insights into the company's sustainability initiatives. The Serlin Haley team, represented by Andy Hackman and Lauren Aguilar, provided a comprehensive update on regulatory and legislative developments at both the federal and state levels.



The 2024 FPA Annual Meeting Opening party featured games, a beer burro, and line dancing





From left to right: Jessica Provenzano and Leonardo Cortez of Baystar with Alana Carr of Hosokawa Alpine American, Inc. network at the FlexForward® Conference Exhibitor Reception



Sporting Cowboy Hats at the 2024 Annual Meeting Welcome Reception



The 2024 Annual Meeting was the largest in recent history

## Thank You to our 2024 Sponsors

In 2024, we were grateful to receive additional support from several of our member companies. We want to take this opportunity to extend a special “Thank You” to the following organizations:



### Platinum Sponsor:

**dazpak**



### Gold Sponsors:



**Shell Polymers**



**FlintGroup**



### Silver Sponsors:

Berry Global

Bostik, Inc.

Glenroy, Inc.

Hosokawa Alpine American, Inc.

Nordmeccanica, NA

Sun Chemical Corporation



### Bronze Sponsors:

ACTEGA

Paper Converting Machine Corporation (PCMC)

Siegwerk

Wikoff Color Corporation



### Annual Meeting Golf Tournament Sponsors:

Hudson Sharp

Paper Converting Machine Company (PCMC)

Terphane LLC

Additional highlights included a market outlook on polyethylene and polypropylene presented by Esteban Sagel and presentations from FPA's 2025 Sustainability Award winners, Amcor Flexibles and Berry Global, who showcased their award-winning initiatives.

As part of the conference's continued evolution, exhibit tabletops were introduced for the first time. Six companies participated, leveraging this new opportunity to connect with attendees and showcase their offerings to the flexible packaging industry. Inaugural exhibitors were:

- FILMtech Inc.
- Flex Films (USA) Inc.
- Inteplast Group
- Paper Converting Machine Company (PCMC)
- Polymount US LLC
- Strategex

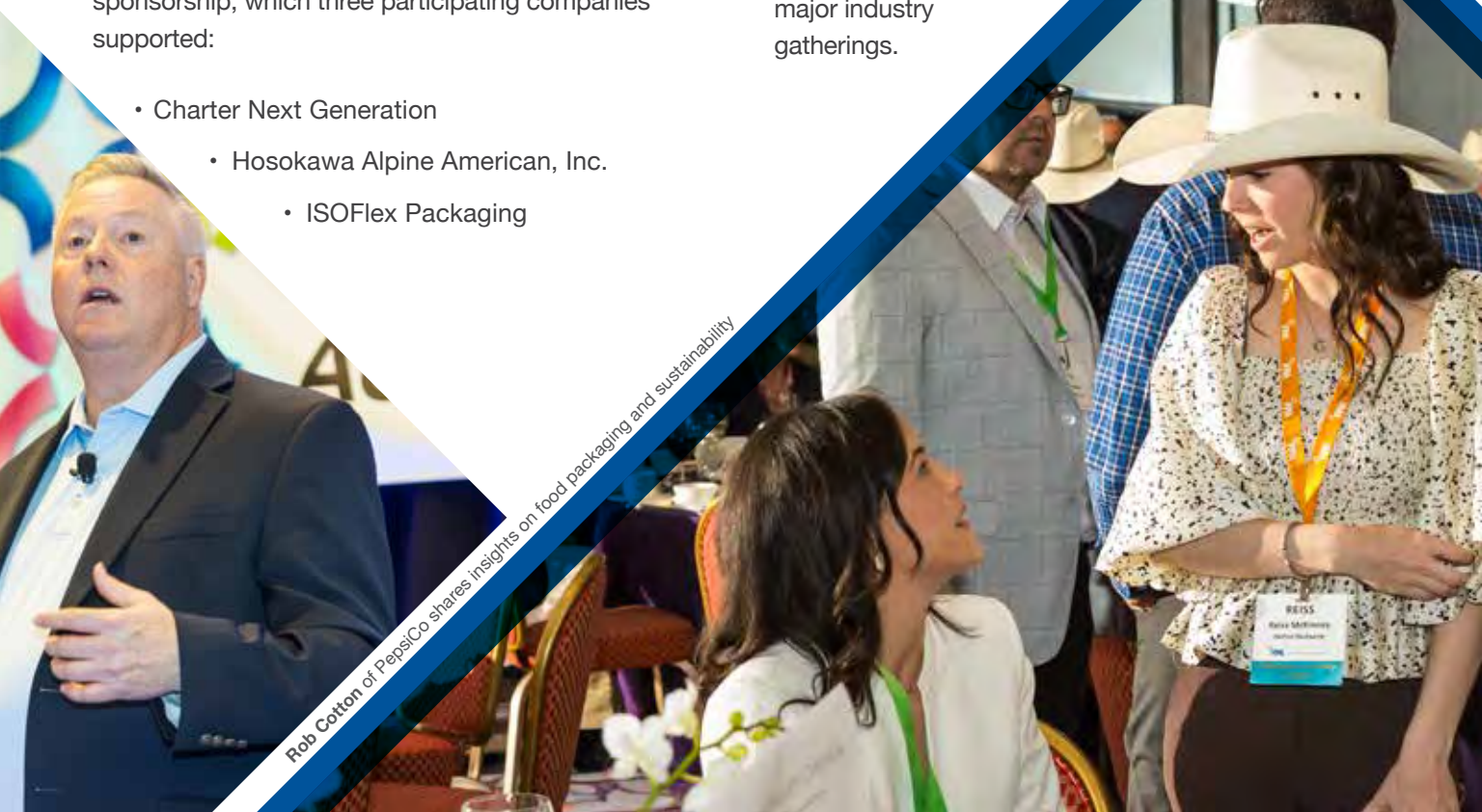
Sponsorship opportunities expanded with the introduction of a new Welcome Reception sponsorship, which three participating companies supported:

- Charter Next Generation
- Hosokawa Alpine American, Inc.
- ISOFlex Packaging

The 2024 FlexForward® Conference saw significant growth, with a 51% increase in overall attendance and a 56% rise in member participation compared to the 2023 event. Conference revenue also experienced a notable 76% increase.

As part of the "Meetings Reimagined" initiative, an FPA workgroup requested an evaluation of whether "destination" or "industry-centric" locations are a greater draw for attendees. To support this effort, the 2025 conference will be held in New Orleans, Louisiana, while plans are underway to host the 2026 event in Milwaukee, Wisconsin. Additional details about FlexForward® 2026 will be shared during the upcoming Annual Meeting.

Other considerations in venue selection include seasonal weather patterns. Odd-year conferences will be scheduled in October or November, while even-year events will continue in September to avoid overlap with other major industry gatherings.





# Save the Date!



November 4-6 | Loews New Orleans

**Loews Hotel**  
**New Orleans, LA**  
**November 4 - 6, 2025**



# ANNUAL Meeting

**JW Marriott Orlando, Grande Lakes**  
**Orlando, Florida**  
**March 18 - 20, 2026**

Networking fun at the NASCAR Hall of Fame for the FlexForward® Welcome Reception

From left to right: Karina Balestrini of TC Transcontinental; Reiss McKinney of ISOFlex Packaging; and David McKinney of ISOFlex Packaging connect before the FPA Annual Achievement Awards Banquet takes place at the 2024 FPA Annual Meeting





# LEADERSHIP

## Officers & Executive Committee

### **William (Bill) Jackson, Ph.D.**

Amcors Flexibles  
Chair of the FPA Board of Directors

### **Russell Grissett**

Sonoco Flexible Packaging  
Vice-Chair of the FPA Board of Directors

### **David Love**

Printpack  
Treasurer of the FPA Board of Directors

### **Sachin Desai**

ProAmpac  
Executive Committee Member at Large

### **Guenther Hering**

Henkel Corporation  
Executive Committee Member at Large

### **Kevin Keneally**

PPC Flex  
Executive Committee Member at Large

### **Kevin Kwilinski**

Berry Global  
Executive Committee Member at Large

### **David Nunes**

Hosokawa Alpine American, Inc.  
Executive Committee Member at Large

### **Adrianne Tipton**

Novolex  
Executive Committee Member at Large

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## Board of Directors

### **Evan Arnold**

Glenroy, Inc.

### **Sean Bowie**

Bryce Corporation

### **Jarred Carter**

Siegwerk

### **Amanda Ciccone**

Dow

### **Ron Cotterman**

Sealed Air Corporation

### **Doug Dodrill**

PAXXUS, Inc.

### **Kasie Fairbarn**

Windmoeller & Hoelscher Corporation

### **Kenneth Fontaine**

AMGRAPH Packaging, Inc.

### **Mark Forman**

Belmark inc

### **Kevin Kelly**

Emerald Packaging, Inc.

### **Nicki Kerrigan**

Flint Group

### **Jeff Koch**

American Packaging Corporation

### **Mark Lewis**

Wikoff Color Corporation

### **Sarah Marshall**

NOVA Chemicals, Inc.

### **Amy Moore**

Westlake Corporation

**Board of Directors (continued)****Thomas Morin**

TC Transcontinental Packaging

**Chris Parrilli**

Sun Chemical Corporation

**Kristin Thomas-Martin**

ExxonMobil Product Solutions

**Joe Moynihan**

Mondi

**Apurva Shah**

Charter Next Generation

**Chair Advisory Council****Weston Harcourt**

Sonoco Flexible Packaging

**Chris Osborn**

Amcor Flexibles

**Catherine Heckman**

Flexcon Company, Inc.

**Keith Smith**

Vonco Products, LLC

**Marc Leclair**

St. Johns Packaging Ltd.

**Andrew Wheeler**

Windmoeller &amp; Hoelscher Corporation

**Emerging Leadership Council (ELC)****Kasie Fairbarn**Windmoeller & Hoelscher Corporation  
Co-Chair**Weston Harcourt**Sonoco Flexible Packaging  
Co-Chair**Environmental, Health, and Safety (EHS) Committee****Cindy Haven**ProAmpac  
Co-Chair**Rob Harmon**Amcor Flexibles  
Co-Chair**Sterilization Packaging Manufacturers Council (SPMC)****Dhuanne Dodrill**PAXXUS, Inc.  
Chair

Former FPA President & CEO **Alison Keane** talks about the state of the U.S. flexible packaging industry at the 2024 Annual Meeting



**William (Bill) Jackson**, Ph.D., CTO Amcor Global Flexible Packaging and Chair of the FPA Board of Directors, was the master of ceremonies at the 2024 FPA Annual Meeting



**David Goch**, Webster, Chamberlain & Bean, and FPA General Council with **Dani Diehlmann**, Interim Director and VP of Communications, review the FPA antitrust policy at the FlexForward® Conference

# MEMBERSHIP

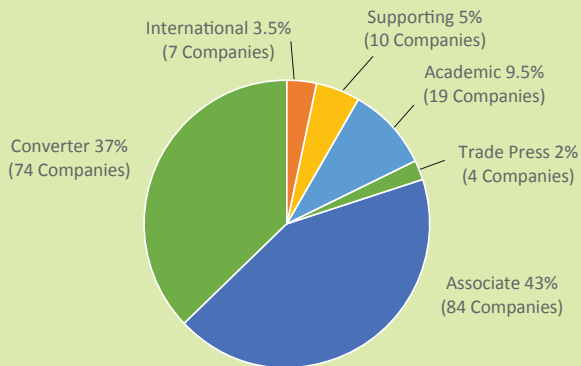
## New Member Category

2024 saw the addition of the new “Supporting” membership category. This brought 6 new members to the Association. FPA also added 16 new members from our traditional member categories.

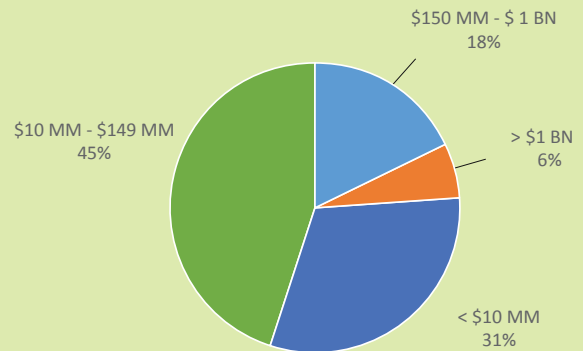
## FPA Membership Breakdown

Converters and Associates represent the largest number of members. While Converters represent 37% of FPA members, they provide 55% of FPA's dues revenue. Associates represent 43% of the membership and 43% of revenues.

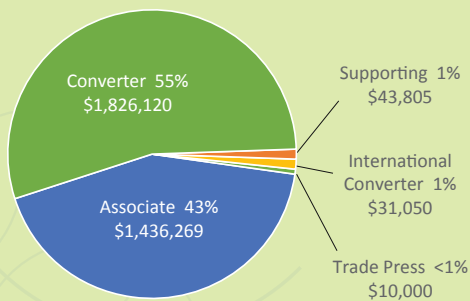
198 Companies as of  
December 31, 2024



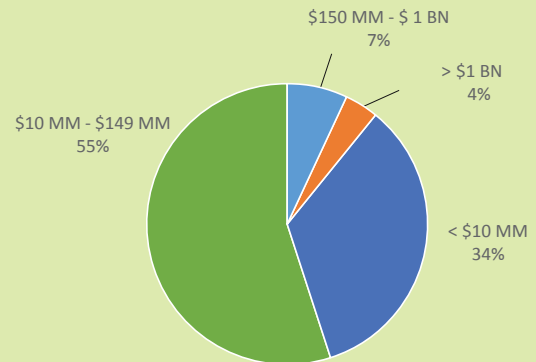
Converter Company Breakdown



Company Dues Breakdown as of  
December 2024 - \$3,347,244



Associate Company Breakdown





## 2024 FPA Companies

### Converter Companies

Accredo Packaging Inc.	MAR-CO Packaging
Admiral Packaging, Inc.	Martini Packaging
Aeroflexx	Mondi
Amcor Flexibles	Morris Packaging*
American Packaging Corporation	Nosco
AMGRAPH Packaging, Inc.	Novolex
AWT Labels and Packaging	Package Printing Co. Inc
Beacon Converters, Inc	PAXXUS, Inc.
Belmark inc	Phenix
Berry Global	Poly Print, Inc.
Brook + Whittle	Polymerall Flexible Packaging
Bryce Corporation	PPC Flex
Catty Corporation	Pregis
Celplast Metallized Products Limited	Prime Packaging, LLC
C-P Flexible Packaging	Printpack Inc.
DazPak Flexible Packaging	ProAmpac
Emerald Packaging, Inc.	Profile Films*
Fastik*	ProMach – CL&D Graphics
FILMtech Inc.	Rol-Vac, LP
Flex Films	Sealed Air Corporation
Flexcon Company, Inc.*	Sealstrip Corporation
Fres-co Systems USA, Inc.	Sonoco Flexible Packaging
Garlock Flexibles	Southern Graphic Systems LLC
Glenroy, Inc.	St. Johns Packaging Ltd.
Gopak**	SteriPax
Gualapack US Corp.	Südpack Oak Creek Corporation
Hart Flex Pack	SunDance
Hazen Paper Company	SunFlex Packagers Inc.
INDEVCO Packaging Solutions	Taylor Prime Labels & Packaging
Inland Packaging	TC Transcontinental Packaging
Integrated Plastics Packaging	Technipaq, Inc.
Inteplast Group	Tekni-plex, Inc.
Intertape Polymer Group	Unified Flex Packaging Technologies*
Jet Packaging Group*	Verdafresh, Inc.
Kendall Packaging Corporation	Vonco, LLC
Kiliper Corporation*	Winpak Ltd.
Louisiana Plastics Industry	Zacros America, Inc.

\*New member for 2024 \*\*New member signed up in 2024 for the 2025 member year

**International Converter Companies**

Emirates Printing Press, L.L.C.  
 Hotpack Packaging Industries LLC  
 Paharpur 3P  
 Películas Plásticas S.A. de C.V.  
 Polykar  
 Productos Alimenticios Bocadeli S.A. de C.V.  
 Tempo Flexible Packaging

**Associate Companies**

ACTEGA  
 ALLIEDFLEX Technologies, Inc.  
 Ampacet Corporation  
 B&B Packaging Technologies L.P.  
 Bamberger Polymers, Inc.  
 Baystar  
 Bobst North America Inc.  
 Bostik, Inc.  
 Charter Next Generation  
 Chevron Phillips Chemical Company  
 Circulus Holdings, PBLLC  
 Cloeren Incorporated  
 CMD Corporation  
 Coim USA, Inc.  
 Comexi North America, Inc.  
 Cosmo Films Limited  
 Davis-Standard, LLC  
 Domtar\*  
 Dow  
 DuPont  
 Duraco Specialty Materials  
 Dürr Systems, Inc.  
 Energy Sciences, Inc.  
 eProductivity Software  
 ExxonMobil Chemical Company  
 Flint Group

Fujifilm North America Corporation,  
 Graphic Systems Division  
 Gulfpack Americas Inc.  
 H.B. Fuller  
 Henkel Corporation  
 Hosokawa Alpine American, Inc.  
 HP, Inc.  
 In.Pack North America\*  
 INX International Ink Co.  
 ISOFlex Packaging  
 Koenig & Bauer  
 Kuraray  
 LyondellBasell  
 MacDermid Graphics Solutions  
 Mamata Enterprises, Inc.  
 Maxcess International  
 Menshen Packaging USA, Inc.\*\*  
 Mica Corporation  
 Michelman  
 Mid South Extrusion  
 Miraclon, Home of Kodak Flexcel Solutions  
 Mitsubishi Chemical America, Inc.,  
 Polyester Film Division  
 Mitsui Chemicals  
 Morchem, Inc.  
 Nobelus  
 Nordmeccanica, NA  
 Nordson Corporation – PPS  
 NOVA Chemicals, Inc.  
 Oben US, LLC \*  
 OMET AMERICAS  
 Paper Converting Machine Company (PCMC)  
 Pearl Technologies Inc.  
 Plastilene  
 Polymount US LLC\*  
 Polyplex USA, LLC

Preco, LLC  
 Presto Products Company FRESH-LOCK® closures  
 Profol  
 Reinfenhauser Inc.  
 RKW North America, Inc.  
 Ropak Manufacturing Company, Inc.  
 Screen GP Americas, LLC  
 SEI Laser\*  
 Shell Chemical LP  
 Ship & Shore Environmental, Inc.  
 Siegwerk  
 SKGC-Americas  
 Sun Chemical Corporation  
 Terphane LLC  
 Toppan USA, Inc.  
 Totani America  
 Toyo Ink America, LLC  
 Transcendia  
 UBE America Inc.  
 UTECO North America, Inc.  
 Westlake Corporation  
 Wikoff Color Corporation  
 Windmoeller & Hoelscher Corporation  
 XSYS Global

#### Academic Companies

California Polytechnic State University  
 Clemson University  
 Conestoga College  
 Fox Valley Technical College  
 Government Institute of Printing Technology,  
 Mumbai  
 Indiana State University  
 La Roche College

Michigan State University School of Packaging  
 Missouri University of Science and Technology  
 Monterrey Institute of Technology and Higher  
 Education  
 Murray State University  
 Pittsburgh State University  
 Rochester Institute of Technology –  
 Department of Packaging Science  
 Rutgers, the State University of New Jersey  
 San Jose State University Packaging Program  
 University of Florida  
 University of Wisconsin – Stout  
 Virginia Tech\*  
 Washington State University

#### Trade Press Companies

BNP Media  
 Converting Quarterly  
 Packaging Impressions  
 PMMI Media Group

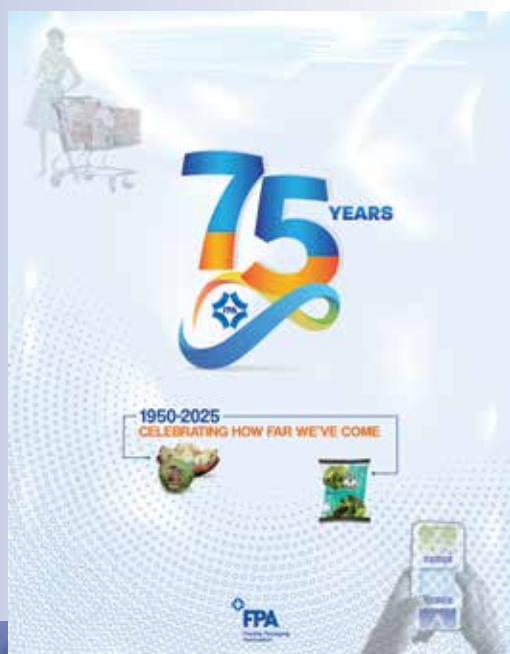
#### Supporting Companies

ACS Group  
 Avery Dennison Corporation  
 Blaigne Industry Analytics LLC\*  
 Chase & Associates\*  
 Frain Industries  
 Industry Intelligence Inc.  
 JM Search\*  
 Keypoint Intelligence\*  
 Soarus, L.L.C. & MSI Technology, L.L.C.\*  
 Strategex\*



# FPA 2024 FINANCIALS

FPA's annual budget, operating on a calendar fiscal year, is based on guidance and approval from the Board of Directors according to determined priorities and the FPA strategic plan. The Board of Directors reviews our financial status at least twice a year, allowing FPA to maintain a strong and focused direction. We are financially healthy, having ended the 2024 fiscal year with \$2,096,157 in net assets, including \$1,869,631 in investments. FlexPAC®, our political action committee activated in 2024, is now included in our financials.



Explore FPA's 75th Anniversary storybook and more at [www.FPA75.com](http://www.FPA75.com)

## FPA OPERATING REVENUE AND SUPPORT

Membership Dues	\$ 3,347,244
Annual Meeting	\$ 657,785
FlexForward Conference	\$ 216,100
Sponsorships	\$ 240,000
Miscellaneous	\$ 100,000
Royalties	\$ 37,650
Achievement Awards Competition	\$ 11,600
<b>Total Operating Revenue and Support</b>	<b>\$4,610,379</b>

## FPA OPERATING EXPENSES

Marketing / Communications	\$ 920,273
Meetings	\$ 796,953
Advocacy	\$ 748,086
Management and General	\$ 690,492
Business and Economics	\$ 306,506
Sustainable Strategy	\$ 240,754
Market Research	\$ 181,471
Regulatory Affairs	\$ 179,127
Leadership	\$ 165,959
Membership	\$ 158,742
<b>Total Operating Expenses</b>	<b>\$4,388,363</b>

## FPA NET ASSETS

Beginning of Year	\$ 1,641,786
End of Year	\$ 2,096,157

## FPA INVESTMENTS

Beginning of Year	\$ 1,637,275
End of Year	\$ 1,869,631

## FLEXPAC® NET ASSETS

Beginning of Year	\$ 0
End of Year	\$ 43,928

2025 will see FPA celebrating its 75th Anniversary throughout the entire year. This will include special celebrations and recognition at our Annual Meeting in March and our FlexForward® Conference in November, a special 75th Anniversary storybook, legacy member spotlights and testimonials, a dedicated micro website with an interactive timeline, and more. It's important to celebrate and recognize where we have come from as we look towards where we are going.



In that regard, we expect to continue to see and engage on a plethora of proposed legislation and regulation at the state level, including on packaging extended producer responsibility (EPR) establishment and implementation; labeling for compostability and recyclability; post-consumer recycled (PCR) content mandates for packaging; additives, chemicals and ingredients in packaging; and enablement and infrastructure for both advanced and mechanical recycling.

Let's also not forget that in 2025, packaging EPR will officially go into full effect in Colorado and Oregon, two of the five states that have passed laws on this policy. With producer fees and reporting officially in place, it will be a new era in the U.S. for the flexible packaging industry, and for FPA as we work to navigate and engage on this and ongoing implementation of the additional programs in California, Minnesota and Maine for our members as vehicles to get more flexible packaging collected, sorted, and reprocessed.

Even with new Republican control of both chambers of the United States Congress and the White House, we also expect to see additional proposed legislation and regulations at the federal level that could impact flexible packaging. This could include legislative

proposals for increased recycling infrastructure, regulatory oversight of labeling through Congress and/or the U.S. Federal Trade Commission (FTC), renewal of federal tax credits originally implemented under President Donald J. Trump during his first term, and likely even proposed tariffs from the President since he ran on that during his campaign before being reelected in November. Be assured that FPA will engage on these and any other federal issues that might impact flexible packaging.

In addition to our increased advocacy and public policy engagement in 2025, we will continue to be a source of sound data for FPA members and the U.S. flexible packaging industry. This will include our annual *State of the U.S. Flexible Packaging Industry Report*, *Cost Earnings Report*, and *Sterilization Packaging Manufacturers Council (SPMC) Report*; our quarterly '*Pulse of the Industry*' reports; and our triannual *Industry Compensation Report*. Additionally, later in 2025, we will be releasing our first-ever *U.S. Flexible Packaging Industry Economic Impact Report* detailing the direct, indirect, and induced impact of our industry in terms of jobs and taxes paid.

Finally, communications to our members and other stakeholders will continue to be key for FPA, whether that be through recurring and new email communications, including on advocacy and policy matters; our bimonthly *FlexPack VOICE®* magazine; our annual *Flexible Packaging Buyer's Guide*; press releases; media and trade publication articles; conferences and trade shows; member only and public webinars; social media; and all the websites that FPA hosts ([FlexPack.org](http://FlexPack.org), [PerfectPackaging.org](http://PerfectPackaging.org), [www.FlexPackVOICE.com](http://www.FlexPackVOICE.com), [www.FlexPackCareers.org](http://www.FlexPackCareers.org), [www.FlexPAC.org](http://www.FlexPAC.org)). Equally important to communicating the value of our industry will be showcasing the innovation of current and future industry leaders through our annual Flexible Packaging Achievement Awards Competition and Student Flexible Packaging Design Challenge.



# FPA<sup>TM</sup>

Flexible Packaging  
Association

2024  
REPORT TO  
THE MEMBERS

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