



STATE OF THE FOODSERVICE PACKAGING INDUSTRY

FPI FALL CONFERENCE
SAVANNAH GA
OCTOBER 23, 2025

FOODSERVICE PACKAGING INSTITUTE

THE LEADING AUTHORITY FOR THE
NORTH AMERICAN FOODSERVICE
PACKAGING INDUSTRY SINCE 1933



ABOUT FPI

WHO WE ARE

The Foodservice Packaging Institute (FPI), the leading authority for the North American foodservice packaging industry, encourages the responsible use of all foodservice packaging through promotion of its benefits and members' products. Serving as the voice of the industry to educate and influence stakeholders, FPI provides a legal forum to address the challenges and opportunities facing the foodservice packaging industry.

OUR MEMBERS

FPI includes approximately 90% of the entire industry in North America. Its core members are foodservice packaging manufacturers and their raw material and machinery suppliers.

THE VOICE OF FOODSERVICE PACKAGING

OUTREACH AND ENGAGEMENT

- The FPI team attends approximately 45-50 national and regional conferences and events on an annual basis. Other networking meetings are routinely a part of team travel, including member site visits and national sales meetings.
 - We are here to serve as the voice of the industry to our member companies as well!

THE VOICE OF FOODSERVICE PACKAGING

OUTREACH AND ENGAGEMENT

- The FPI team engages with dozens of other associations, non-profits and allied groups that touch the foodservice packaging industry in some way. The level to which we engage and the methods we use vary depending on the group and the subject matter.
- These touchpoints span from basic communications alignment, technical or research related to policy and recovery work.
- Our allies offer the association and thereby the industry greater bandwidth representation and often a louder voice sharing our message.

PEERS & PARTNERS SNAPSHOT



American
Forest & Paper
Association



ASSOCIATION OF PLASTIC
RECYCLERS

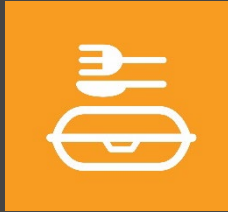


Circular
Action
Alliance



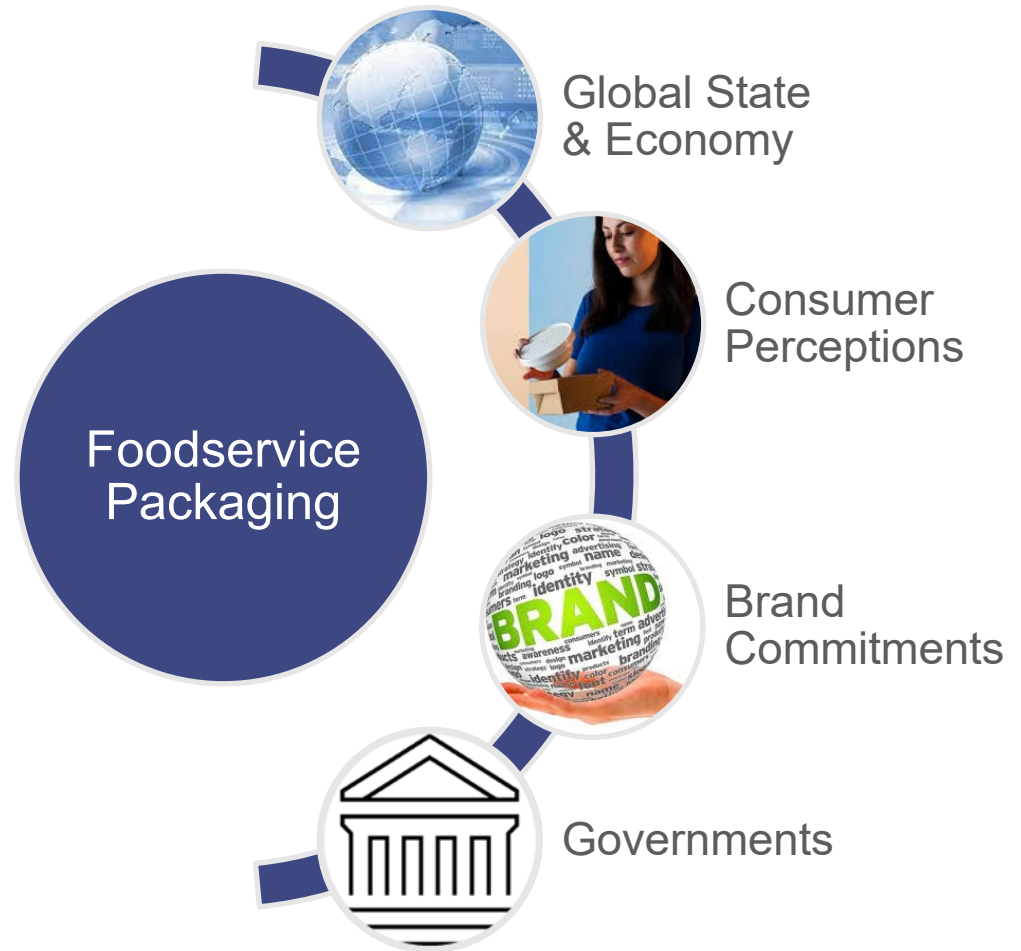
US Composting
Council®





INFLUENCES

INFLUENCES ON THE STATE OF FOODSERVICE PACKAGING



GLOBAL ECONOMY

IT FEELS MORE INFLUENTIAL THAN EVER



- Economic and geopolitical uncertainty abound
 - Tariffs/international trade issues
 - Conflicts
 - General economic unease



TRENDS REPORT



P.O. Box 726, Falls Church, VA 22046
tel (703) 592-9889 fax (703) 592-9864
email fpi@fpi.org web www.fpi.org

THE 2025 TRENDS REPORT, BROUGHT TO YOU BY THE LETTER "C"

- Challenges
 - Economic, geopolitical, macro and micro
- Confusion
 - Regulation and implementation of EPR
- Consolidation
 - Mergers & acquisitions
 - Skus
- Customization, convenience and, of course, cost



State of the Industry Report



FOODSERVICE PACKAGING
INSTITUTE

PO Box 726
Falls Church, VA 22046
tel (703) 592-9889 fax (703) 592-9864
email fpi@fpi.org web www.fpi.org

WHAT ARE THE MOST IMPORTANT CHARACTERISTICS OF FOODSERVICE PACKAGING ITEMS?

2021	2022	2023	2024	2025
• Cost • Performance • Appearance	• Cost • Performance • Recyclable	• Cost • Compostable • Recyclable • Recycled-content • Performance	• Cost • Performance • Recyclable	• Cost • Performance • Recyclable

Source: FPI's 2021-2025 State of the Industry Survey

HOW DO YOU EXPECT THIS YEAR TO BE COMPARED TO THE PREVIOUS YEAR...

- In terms of volume:

2023	2024	2025
50% better 27% worse 23% the same	57% better 10% worse 33% the same	47% better 35% worse 18% the same

- In terms of profit:

2023	2024	2025
38% better 29% worse 32% the same	35% better 23% worse 42% the same	18% better 39% worse 43% the same

TOP MARKET SEGMENTS THAT WILL SEE GROWTH IN THE NEXT 5 YEARS?

2023	2024	2025
1) Fast Casual 1) Supermarket/Grocery 3) Chain QSR 3) C-store 5) Independent QSR	1) Chain QSR 1) C-store 1) Fast Casual 4) Supermarket/Grocery 5) Hospitals	1) Fast Casual 2) C-store 2) Supermarket/Grocery 4) Chain QSR 5) Nursing Homes

CONSUMER PERCEPTIONS

FPI CONSUMER PERCEPTIONS SURVEY & REPORT

conducted in 2019, 2021 and 2025

TOP ENVIRONMENTAL CONCERN

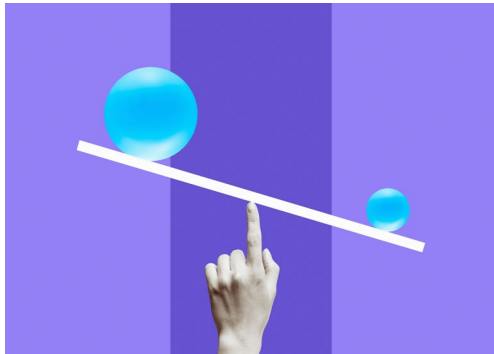
Single-use items may end up as litter on land and in waterways.



CONSUMER PERCEPTIONS

FOODSERVICE INDUSTRY PERCEPTIONS

- Consumer sentiments
 - Economics
 - Generation Z restaurants are the first thing to cut
 - At home and away from home food shifts



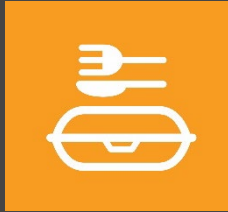
BRAND COMMITMENTS

2025 IS ALMOST OVER, ARE WE GOING TO DOUBLE DOWN OR DO AWAY WITH (VOLUNTARY) COMMITMENTS OF THE PAST?

- Recyclable or compostable
- Recycled content
- Reusable (transportation BOH v. FOH/consumer)

ADDITIONAL FACTORS:

- What was visionary or voluntary has now been captured by legislators and regulators and made mandatory
- Pacts or alliances still influential (global landscape and here in North America)



POLICY

2025 POLICY ACTIVITY

CANADA

- Federal plastics agenda shifting pending court appeal and economic pressures
- Canadian Competition Bureau released its final environment claims guidelines
- Provincial extended producer responsibility program introduction, evolution, expansion and harmonization efforts continue
- Ontario Blue Box Regulation amendments finalized

UNITED STATES

- Federal *Make America Healthy Again* (MAHA) initiative has FSP implications, including influencing state-level policies
- Longer state legislative sessions created greater opportunities for EPR proposals to advance
- Implementation of EPR has begun
- Uncertainty remains in California regarding EPR, environmental claims and compostability labeling

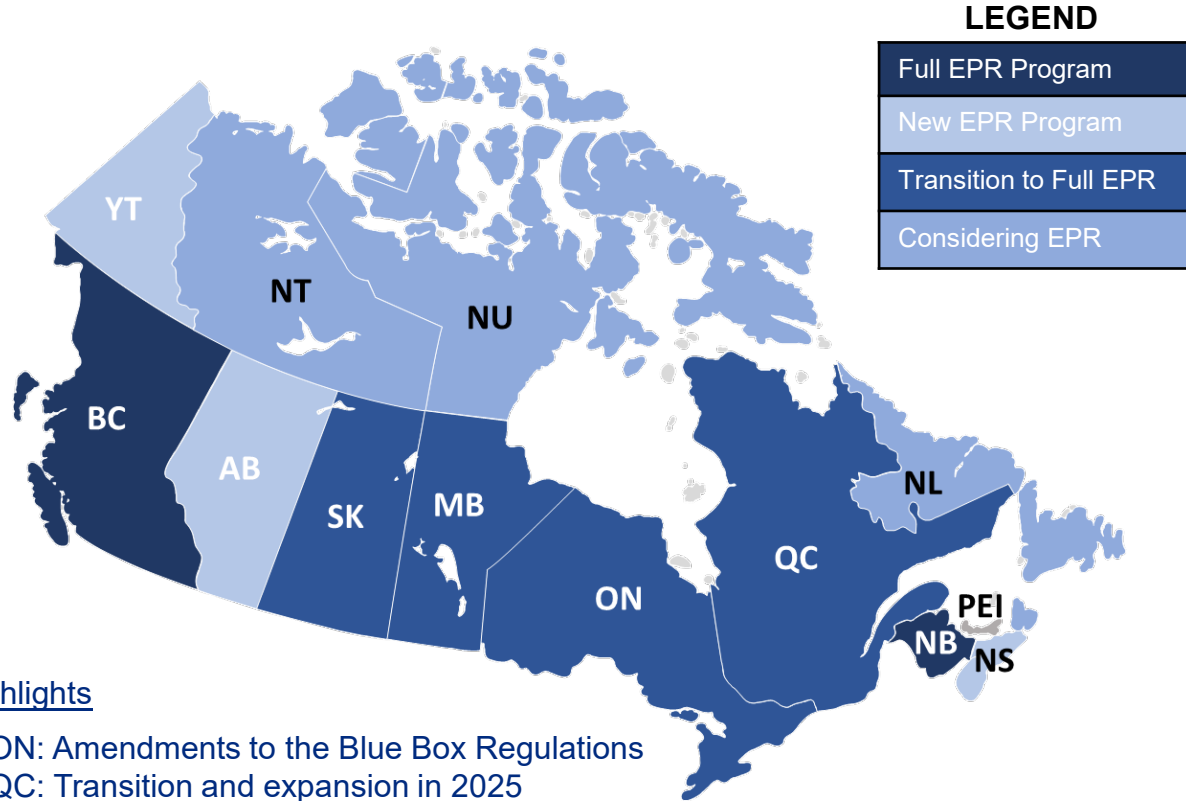
REMINDER:

Legislative and regulatory definitions of “plastics” continue to go beyond plastics-only items

2025 PROVINCIAL ACTIVITY



Extended Producer Responsibility (EPR)



Highlights

- ON: Amendments to the Blue Box Regulations
- QC: Transition and expansion in 2025
- AB: Operational as of April 1, 2025
- YT: November 1, 2025

HIGHLIGHTS of AMENDED ONTARIO BLUE BOX REGULATIONS

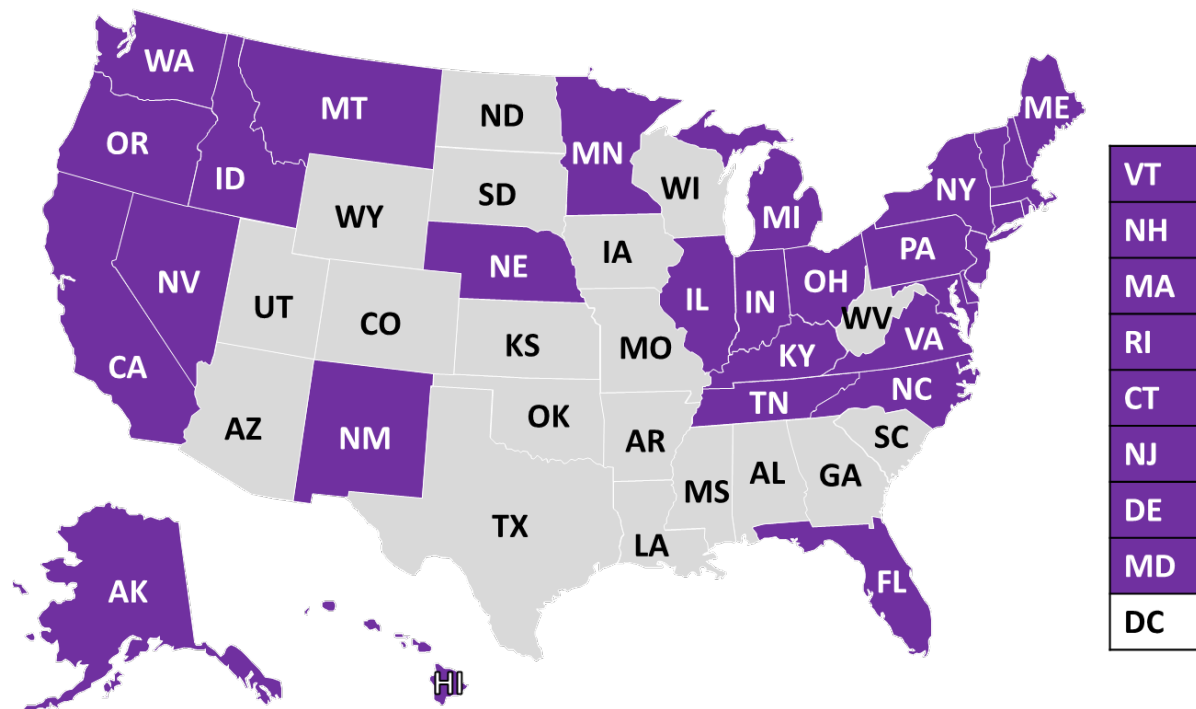


TARGETS

- Keep current recovery targets for paper, glass, metal, and rigid plastic; delay increases until 2032.
- Producers must make “best efforts” to meet targets in 2026–2027; enforcement starts in 2028.
- Allow up to 15% of obligations to be met through energy recovery from residuals, under limited conditions.

SCOPE

- Postpone collection from multi-residential buildings, schools, and specified care homes.
- Remove requirement for public-space collection expansion.

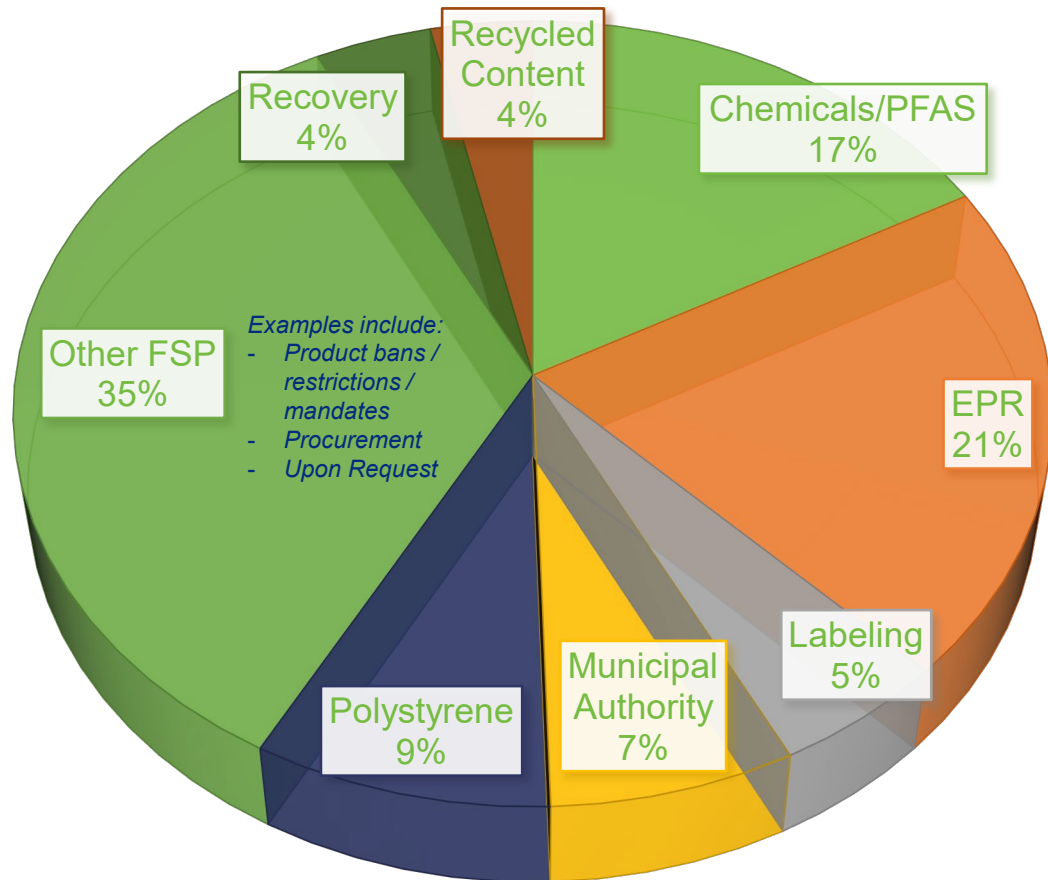


As of October 2025

2025 STATE LEGISLATIVE LANDSCAPE

~**230** proposed
pieces of legislation
that could impact FSP
in **31** states

2025 STATE ACTIVITY POLICY AREAS



2025 FPI ENGAGEMENT

LEGISLATIVE ENGAGEMENT



REGULATORY ENGAGEMENT

- **Oregon:** Program and producer payments began July 1, 2025
- **California:** SB 54 Rulemaking
- **Maine:** Stewardship Program Readily Recyclables List
- **Colorado:** Program Plan and Eco-modulation (fee bonuses)



2025 VETOED

- **Montana** – Polystyrene (HB 477)
- **Nevada** – Polystyrene (AB 244)
- **California** – PFAS (SB 682)

2025 PASSED

EPR Programs

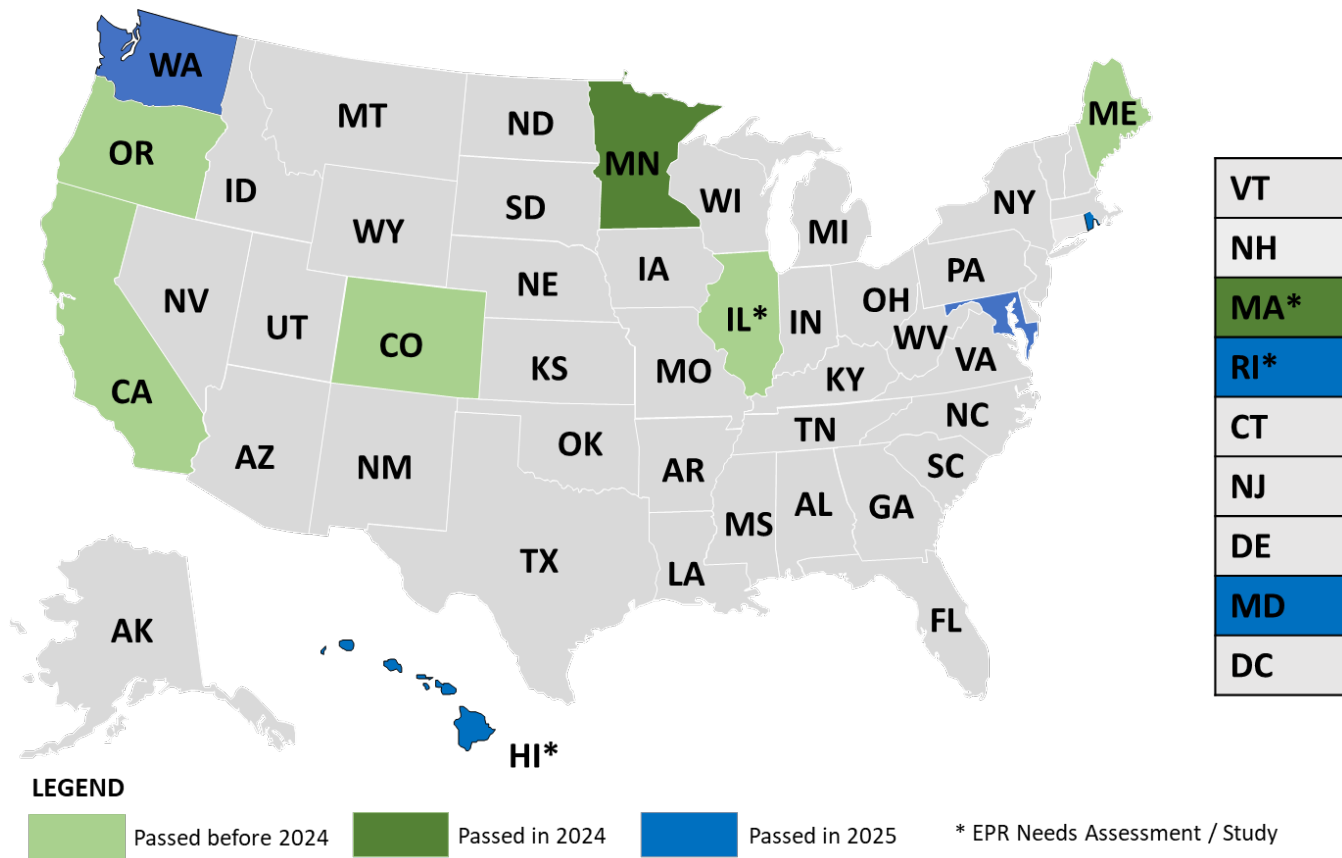
- Maryland (SB 901)
- Washington (SB 5284)
- Maine – EPR Reform (LD 1423)

EPR Needs Assessments

- Hawaii (HB 750)
- Rhode Island (HB 6207)



STATE ACTIVITY: EPR



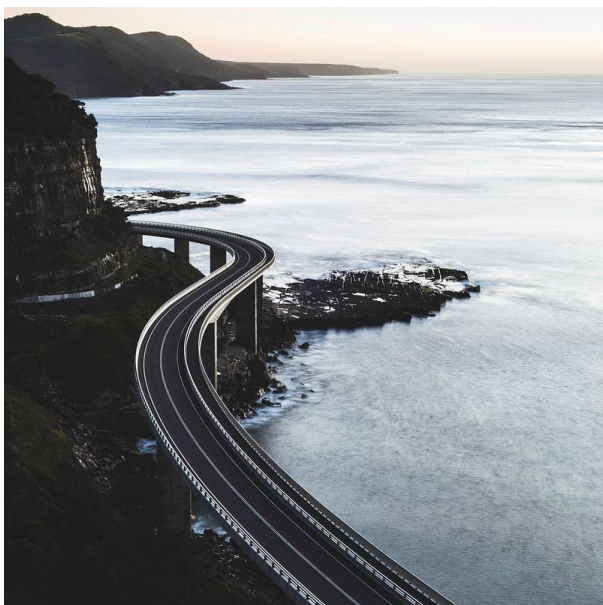
ROAD AHEAD

CANADA

- Federal plastics agenda remains dependent on court appeal and government priorities
- Continued provincial EPR introduction, implementation, harmonization and evolution

UNITED STATES

- States to watch in 2025: New Jersey, Pennsylvania, Massachusetts, Michigan
- Carryover of 2025 proposals to 2026 in many states
- State budget deficits and the Federal MAHA initiative may have impacts in 2026
- Significant ongoing regulatory activity



CALIFORNIA SPOTLIGHT

As of **January 1, 2032**, SB 54 mandates that all packaging and food service ware must be **recyclable** in the state or eligible for being labeled as “**compostable**”.

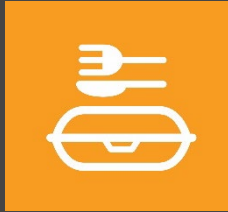
Recyclable

- **SB 343** sets the criteria for recyclability labeling.
 - Effective date is October 4, 2026.
- Additionally, under **SB 54**, all plastic covered material achieves the following recycling rates:
 - Not less than 30 percent of covered material on and after January 1, 2028.
 - Not less than 40 percent of covered material on and after January 1, 2030.
 - Not less than 65 percent of covered material on and after January 1, 2032.

Compostable

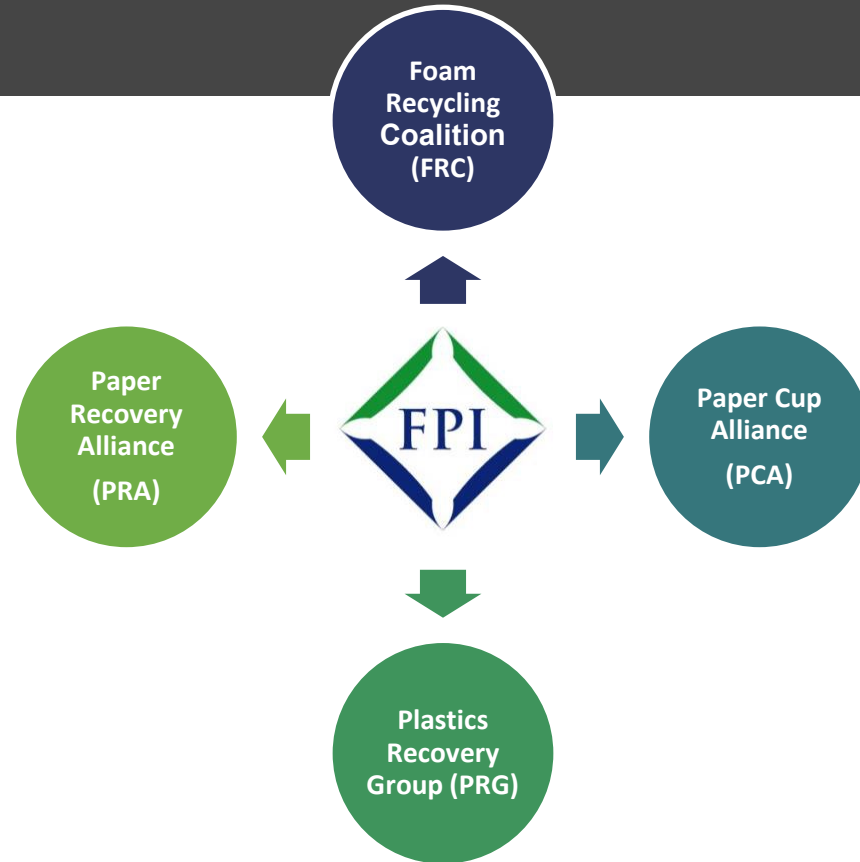
- **AB 1201** sets the criteria for compostability labeling.
- AB 1201 includes the requirement to meet the USDA National Organic Program standards.
 - CalRecycle extended AB 1201 compliance deadline to June 30, 2027.

Pending SB 54 regulations also have implications for what may be considered recyclable and/or compostable.



RECOVERY

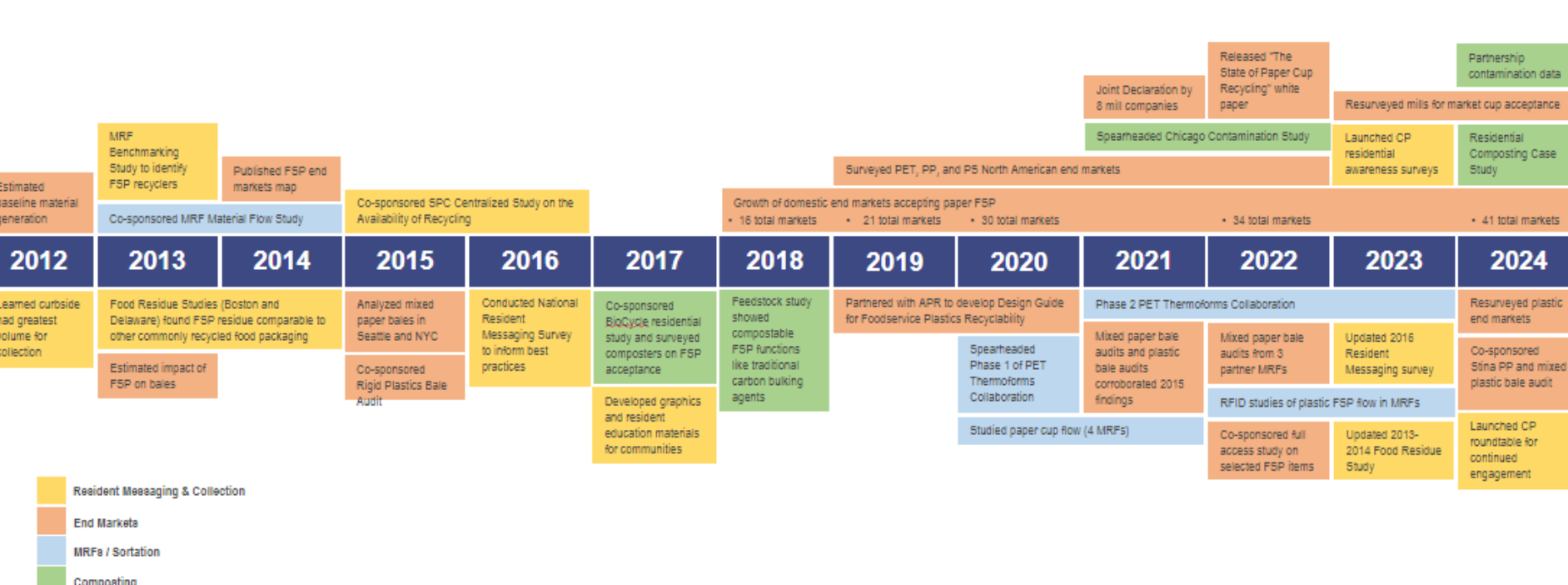
FPI SPECIAL INTEREST GROUPS



CURRENT PRA & PRG MEMBERS



FOUNDATIONAL WORK



PRA/PRG/PCA: GOALS

Overall Goal: Increase **Recovery** of FSP

→ Increase FSP **Inclusion** in Residential Recycling/Composting Programs



PLASTIC FSP



PAPER FSP



COMPOSTABLE FSP

60% National
Access

20% National
Access

Composter Acceptance
Program Inclusion

WHY IS IT IMPORTANT?

Customer/Consumer demand for **recyclable & compostable packaging.**



**2032
CA & MN**

Must meet the definition of recyclable/compostable or **cannot be sold**



Customer demand for packaging that **can be labeled recyclable/compostable.**

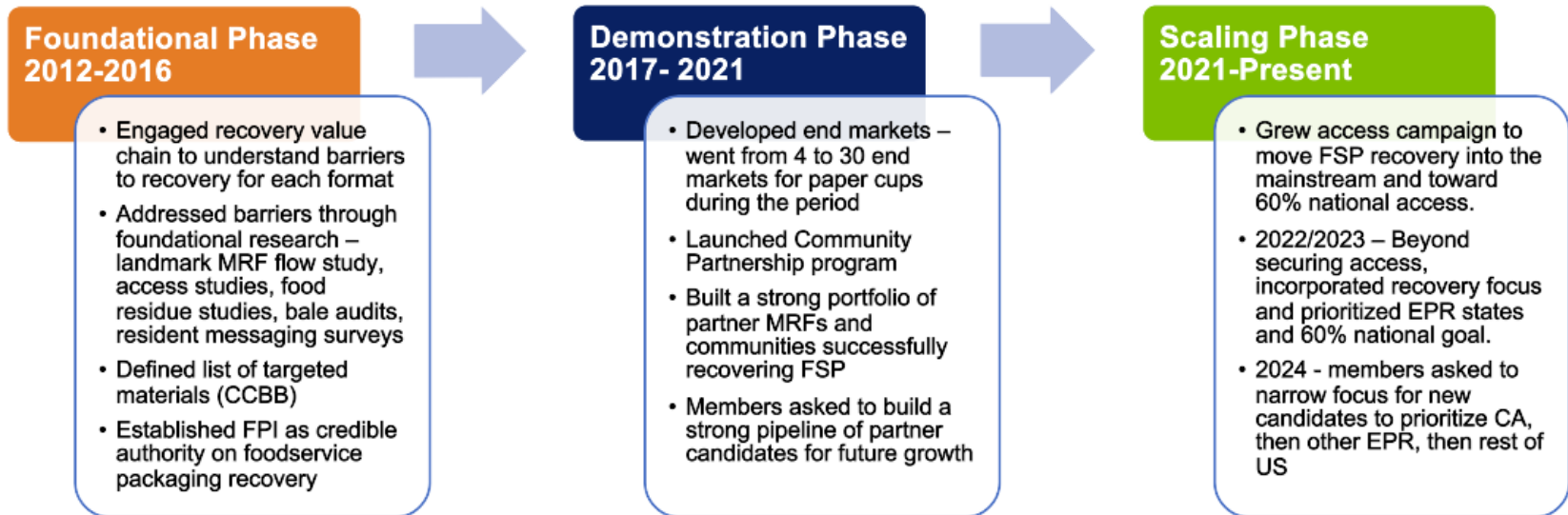


Meets criteria for “recyclable/compostable”

PRA/PRG/PCA STRATEGY

Our overall **MRF-to-Market approach** produces credible and sustainable results – no greenwashing.

Our strategy reflects the evolution in the recovery marketplace - each stage creating prerequisites for the next.



IMPACT OF PRA, PRG & PCA

Action & Impacts

Building Access



FOODSERVICE PACKAGING INSTITUTE

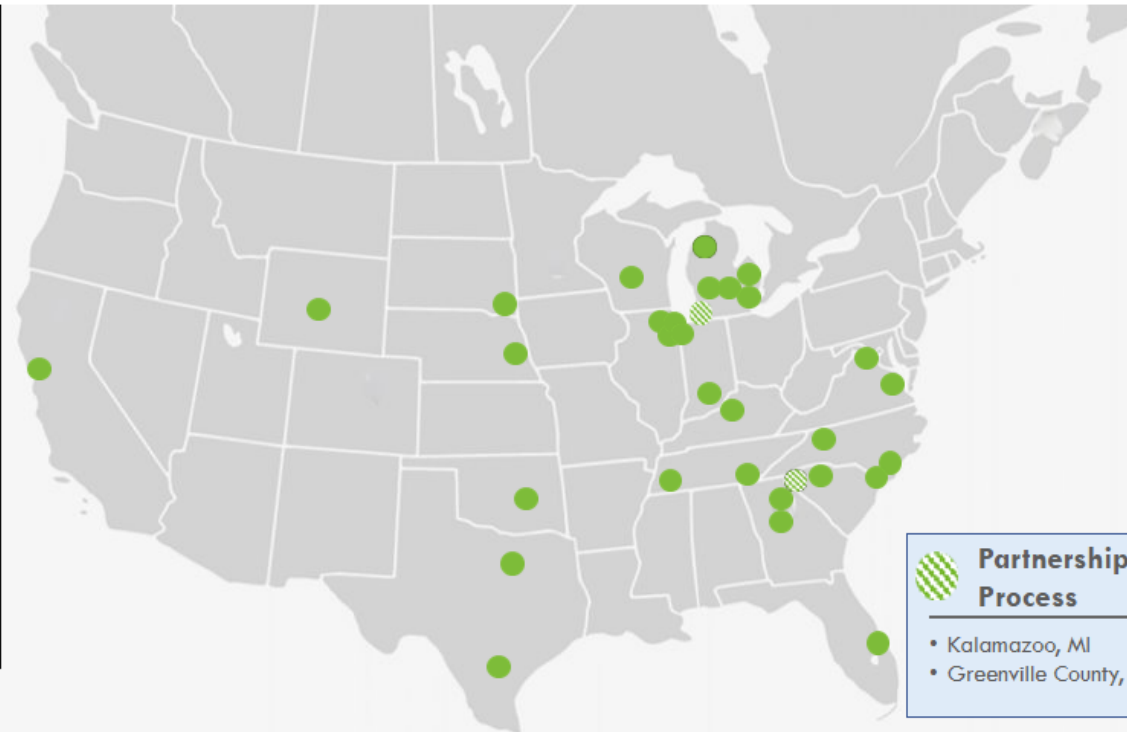
Updated October 2025

PRA/PRG COMMUNITY PARTNERSHIP REACH



Partnerships Launched

- Chattanooga, TN
- Louisville, KY
- Washington, DC
- Denver, CO
- Millennium Recycling (Sioux Falls, SD)
- Clark County, IN
- Kent County, MI
- St. Lucie County, FL
- Martin County, FL
- Indian River County, FL
- Athens-Clarke County, GA
- Atlanta, GA
- DeKalb County, GA
- Detroit, MI
- RRRASOC MRF (Oakland County, MI)*
- GFL MRF (New Boston, MI)*
- Lansing/East Lansing, MI*
- Pellitteri Waste Systems (Madison, WI)*
- Groot Industries, LRS*, SWALCO (Chicago region, IL)
- New Hanover County, NC
- Catawba County, NC
- Tulsa, OK
- Dallas, TX*
- Memphis, TN
- Brunswick County, NC
- Chicago, IL
- Ukiah, CA
- Spartanburg County, SC
- Chesapeake, VA
- Austin Balcones MRF
- First Star Recycling (Omaha, NE)
- Grand Traverse County, MI



Partnerships in Process

- Kalamazoo, MI
- Greenville County, SC

Updated: October 2025

*community partnership + equipment grant

FOCUS: EPR STATES

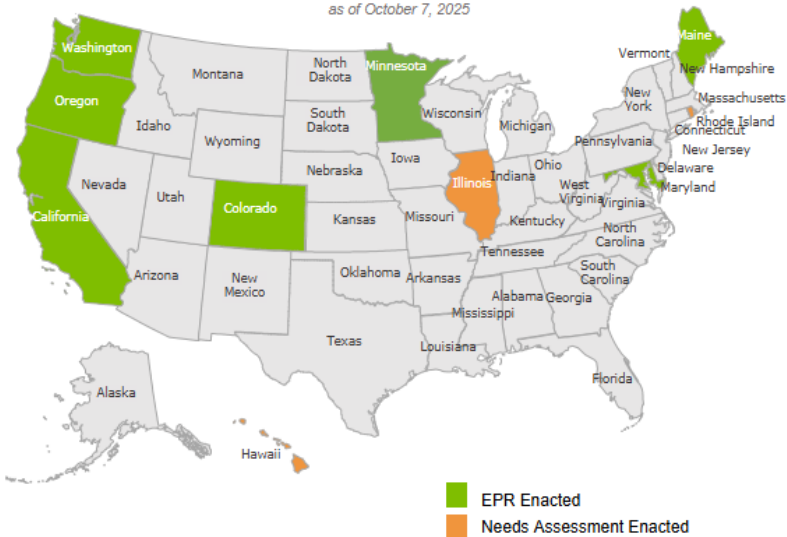
- Dialogues with CalRecycle, CAA
- Focus on creating on-ramps for FSP to keep products in the marketplace and supporting demand-pull from the end markets

DRIVING ACCESS & RECOVERY NATIONWIDE

While EPR plays a prominent role in current discussions and priorities, our strategy aims to advance access and recovery for FSP in both EPR and non-EPR contexts.

States with Packaging EPR Enacted

as of October 7, 2025



EPR STATES

Needs & Objectives

- Inclusion on statewide collection lists
- Collaboration to on-ramp items
- Responsible end markets
- Recovery

FPI Action

- > Demonstrate success in region
- > Show FSP meets definition/threshold

REST OF U.S.

Needs & Objectives

- Achieve national access goals
- Influence and optimize recovery for FSP in states that may be in next wave of EPR and those where EPR is unlikely

FPI Action

- Build access in states where statewide action unlikely – city by city
- Make the case for FSP formats on statewide lists in some non-EPR states
- Continued end market development

RECENT ACTIVITIES

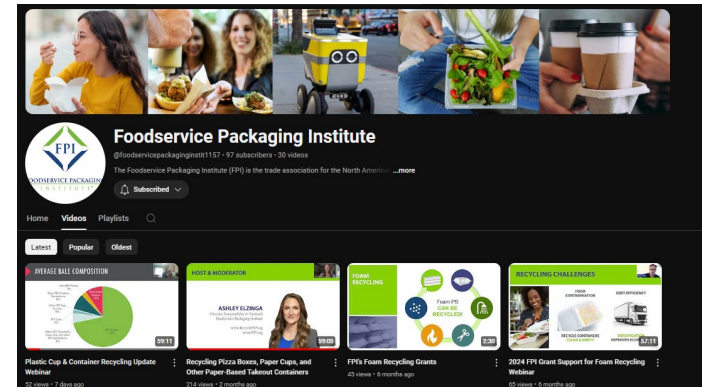
- CAA presentation at the meeting on Wednesday
- SoCal meetings in LA and San Diego
 - CalRecycle, Municipalities, CAA, MRFs, Brokers
- ReMA inbound spec approval
- CA website refresh
- Webinar series



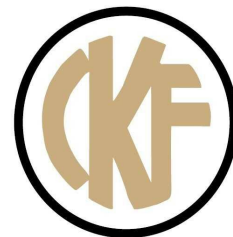
WEBINAR SERIES

- Open to all!
- Compostable Packaging – January
- Recycling Access & Participation – August
- Webinar #3 – Late November/Early December

Follow our YouTube channel!

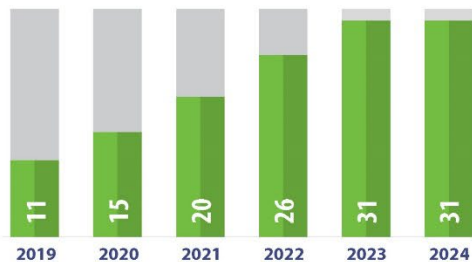


CURRENT FRC MEMBERS





ACTIVE GRANT PROJECTS



32 total grants have been awarded. Chart shows cumulative number of FRC grantees that have installed equipment and are operating foam PS recycling programs through the end of 2022.

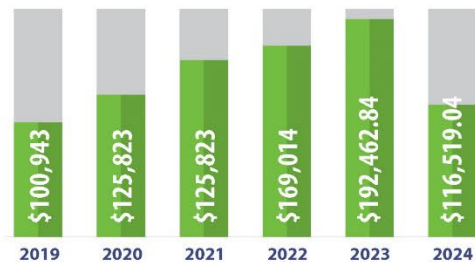


Impact of Foam PS Recycling Grants in North America

FPI's Foam Recycling Coalition has awarded grants across North America to increase the recycling of foam polystyrene. The data here summarizes the impact of the grants that have been implemented from 2019 through 2024. FRC began awarding grants in 2015. For more details, please visit www.RecycleFoam.org.



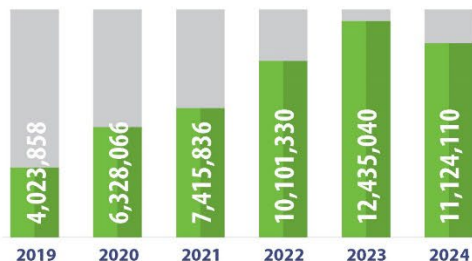
VALUE OF FOAM RECYCLED PER YEAR (\$USD)



Market value of densified post-consumer foam PS packaging collected by grantees



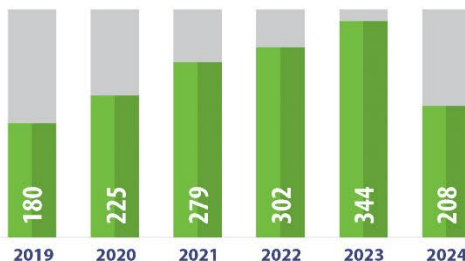
INCREASE IN ACCESS TO FOAM RECYCLING PER YEAR



Additional population that have access to foam recycling based on active FRC grant projects.



LANDFILL SPACE SAVED PER YEAR (53FT TRAILER LOADS)



Volume of foam converted to an equivalent number of tractor trailer loads. 53 ft trailer = 3,816 cubic feet, non-densified foam = 1.30lb/ cubic ft.



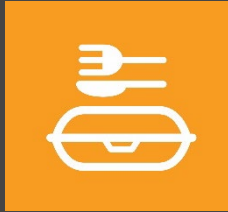
TOTAL WEIGHT OF FOAM RECYCLED PER YEAR (LBS)



Reported weight collected for recycling from active grantees.

HOW TO GET INVOLVED

- Spring 2026 Meetings:
 - Omni Tucson, Tucson, AZ
 - PRA, PRG & PCA Spring 2026 Meeting
 - April 29th, 2026 – Half day
 - FRC 2026 Meeting
 - April 30th, 2026



WHAT'S NEXT...

PREPARING FOR 2026

2026 IS AROUND THE CORNER ... WE NEED YOU!

Member input and engagement remains critical to our efforts

Get involved!

- Participate in FPI's surveys
 - January: State of the Industry
 - September: Trends
- Join FPI's Recovery Groups
- Participate in FPI's Government Relations Committee
- Tell your coworkers: Member 101 webinar early Q1 2026
- Be sure that you are on our mailing lists
- Reach out anytime with feedback, questions and opportunities for FPI



CONTACT INFORMATION



Natha Dempsey ndempsey@fpi.org

Ashley Elzinga aelzinga@fpi.org

Jennifer Goldman jgoldman@fpi.org

Carol Patterson cpatterson@fpi.org

www.fpi.org

