



ANNUAL REPORT

2026

We protect, promote, and grow the plastics industry.

plasticsindustry.org

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a letter from our CEO



Dear PLASTICS Members,

This past year tested our industry and our association. Economic headwinds, tariffs, geopolitical risks, and regulatory uncertainty at the federal and state levels required the industry to adapt in real time, often without a playbook. From the implementation of poorly crafted “EPR” laws and the legal challenges that have ensued to the growing momentum of the MAHA message, we are fighting in more places and on more levels than ever before.

As an industry, sometimes it may feel like it would be easier to just keep our heads down. Instead, PLASTICS continues to build influence and expertise to deepen our impact while staying focused on our mission: protect, promote, and grow the plastics industry.

That choice defines this year’s progress. Our sustainability programs turned commitment into action and continue to grow with new initiatives launching in several states. From the Flexible Film Recycling Alliance to Operation Clean Sweep and the Polystyrene Recycling Alliance, this report highlights the impactful work being done by all our groups (and provides you with a glossary of our acronyms on page 5).

Our advocacy work has grown to match a policy environment that is increasingly complex and consequential for our industry. Our team is more seasoned and influential than it has ever been. Whether it is Albany, Springfield, Sacramento, or Washington D.C., PLASTICS is active and engaged in the fight and you’ll read all about it in this report.

With so much work having been done, it’s hard to believe that one year ago we began merging SPE & PLASTICS, the only two organizations representing the full plastics supply chain. Today, we are on the cusp of finalizing the combined long-term structure, our shared mission, and the strategic actions and investments to create the 1+1=3 scenario we envisioned last fall.

Attendees of NPE2027 will see the possibilities of the merger as we bring ANTEC® together with the largest plastics trade show in the Americas. This integration fits perfectly with the exciting theme of Next is Now. Next May, more than 50,000 plastics professionals will once again experience the latest technology and innovation our industry has to offer across more than one million square feet of exhibit space. I’m especially excited about the debut of Sustainability Park, an immersive experience where attendees can see real solutions in sustainable plastics up close.

This is only a sample of what you’ll read in the 2026 Annual Report. I am proud of the work underway and energized by what it is building toward. The challenges ahead are real, and so are the opportunities. None of what we built this year would have been possible without your engagement. Together, we’re shaping the policies, partnerships and stories that will define the future of our industry and association.

Thank you for your continued support and trust in PLASTICS!

Sincerely,

A handwritten signature in blue ink, appearing to read 'Matt Seaholm'.

Matt Seaholm
President and CEO

a letter from our Chairman



Dear Colleagues,

Thank you for the confidence you've placed in me to serve as Chairman of the Plastics Industry Association Board of Directors. It's a role I don't take lightly, and one that comes with a responsibility to the industry, to all of you, and to the entire PLASTICS team.

I became Chairman with tremendous excitement about what PLASTICS could accomplish. Now, at the midpoint of my first term, I've seen what PLASTICS is capable of when our industry is faced with the challenges of a shifting political and policy landscape. I watched the association stay strategically sound and disciplined, delivering real results for our members, and I encourage you to read the 2026 Annual Report to see the impressive strength and accomplishments of our association firsthand.

PLASTICS isn't just built to tackle the problems of the day; it's built to find opportunities to invest in its future. That's what the Board's approval of the merger with SPE represented: a vote to make PLASTICS more essential and more impactful for years to come. To our new SPE colleagues: welcome.

I know how much each of you care about growing and supporting the professionals in our industry. Joining forces will make PLASTICS and SPE more effective and better equipped to be the unified voice of the plastics industry. We truly are better together.

As I head into the second half of my term, I want to thank my fellow Board members for their work on behalf of our entire membership, and I'm grateful for their trust and collaboration that made this year a productive one.

I also want to thank the entire PLASTICS team for their dedication this year. Under Matt Seaholm's leadership and vision, the team has worked tirelessly on your behalf to protect, promote, and grow the plastics industry. Please join me in thanking them for their efforts.

I look forward to watching this association continue to grow, and I'm honored to be part of it.

Steven D. London

Chairman of the Board, Plastics Industry Association

President & COO, Bekum America Corporation



PLASTICS

INDUSTRY ASSOCIATION

We **protect**, **promote**, and **grow** the plastics industry.

Our programs and initiatives include:



2026

YEAR IN REVIEW

DECEMBER

OCTOBER

- PLASTICS & SPE announce the merger of the organizations.
- Kicking off the NPE2027 cycle, PLASTICS team members exhibited at K-Show in Dusseldorf, Germany and officially announced the 2027 theme: Next is Now.
- PLASTICS 2025 Global Trends Report released.
- PLASTICS named **CJ Biomaterials** the winner of the 2025 Innovation in Bioplastics Award during the tenth annual **Bioplastics Week**.

- Positives of Plastics, a new online hub that brings together clear, science-based information about how plastics are made, why they matter, and the ways they support safety, sustainability, innovation, and everyday life, launches.

- PLASTICS hosts the fourth **Vinyl Week** with the Vinyl Institute, gathering more than 250 industry leaders for a robust three-day agenda.

PLASTICS hosts annual reception at MD&M West in Anaheim, welcoming both members and non-members to network and learn more about the association.

FEBRUARY

- The third Plastics Sustainability Executive Forum, an executive workshop-style program designed to foster collaboration, focused on scaling advanced recycling through policy.

NOVEMBER

PLASTICS hosted its **Plastic Sustainability Executive Forum** in New York City, bringing together two dozen sustainability and government affairs executives to discuss EPR strategies.

The Food, Drug, and Cosmetic Packaging Materials Committee hosted their Fall Meeting with more than 70 participants coming together to focus on key regulatory policy including GRAS.

JANUARY

SPE staff transitioned to PLASTICS as the integration begins.

The Flexible Film Recycling Alliance (FFRA) released its first-ever Impact Report, highlighting industry-led progress to scale flexible film recycling across the U.S. Since launching in January 2025, the Plastic Film Recycling Directory has surpassed 170,000 users and connects consumers to 20,000+ drop-off locations nationwide.

MARCH

SPE hosts ANTEC, its annual technical conference in Pittsburgh, PA. More than 350 technical, engineering, and academic professionals joined to explore the latest in plastics research.

PLASTICS hosts California Legislative Fly-In highlighting how innovation and stronger recycling systems can help meet California's environmental goals while keeping essential products affordable

Momentum and achievements since last October, at a glance.

APRIL

- Plastics Industry Fly-In, hosted with ACC, brings 150+ representatives from industry companies to Capitol Hill for strategic meetings with elected officials and key staff.
- PSRA partnered with the Mexican Plastics Pact to advance recycling of HIPS dairy packaging across central Mexico. This 14-month collaboration focuses on fixing the system so the material can stay in use.
- Operation Clean Sweep released its third annual impact report highlighting progress across the value chain to reduce pellet, flake, and powder loss and improve resin handling practice across 60 countries. 2025 saw more than 300 external inspections conducted across International OCS Programs and more than 35,000 workers train on zero resin loss practices.

AUGUST

- NPE Call for Presentations closes with 100+ submissions.
- PLASTICS hosts the Fifth Annual Recycling Open House, a collaborative event promoting recycling initiatives across the plastics industry.

JUNE

- PLASTICS wins a 2026 Top Workplace from WTOP News, recognizing PLASTICS' commitment to fostering a workplace culture that empowers employees to grow, contribute, and advance the association's mission.
- West Hall of NPE sells out, fueling interest in the remaining space.
- PSRA releases new report on the state of polystyrene recycling across North America.

MAY

- NPE announces addition of ANTEC programming to the education line-up, supporting strong technical education at the event.
- PLASTICS Committee on Equipment Statistics hosts its 2026 Annual Meeting, sharing key updates and market outlooks for plastics machinery.
- FlexForum convened in Ft. Myers, FL to discuss innovation, market trends, and recyclability of films and flexible plastics.

JULY

- The fourth Plastics Sustainability Executive Forum, an executive workshop-style program designed to foster collaboration, focused on microplastics and material stewardship and was at Husky's offices in Toronto.

SEPTEMBER

- PLASTICS releases the 2026 Size and Impact Report at the National Plastics Conference



NEXT IS NOW

NPE2027
The Plastics Show

May 3–7, 2027

PRODUCED BY  **PLASTICS**
INDUSTRY ASSOCIATION

Registration for NPE® Is Now Open

Under the theme Next Is Now, NPE2027: The Plastics Show® will showcase the innovations, technologies, and ideas shaping the future of plastics. Attendees can explore five reimagined Technology Zones, experience live equipment demonstrations, and gain insights on the show floor at three education stages: Innovation, Sustainability, and the brand-new Packaging Stage.

ANTEC® Joins NPE® to Deliver Unparalleled Technical Education

At the core of NPE2027 is a renewed commitment to education as a driver of industry progress. ANTEC®, SPE's premier technical conference, will be fully integrated into the NPE2027 educational program, giving attendees access to cutting-edge research, technical presentations, and insights from experts across the plastics industry. In addition to ANTEC®'s industry-leading content, NPE2027 will feature eight new education tracks covering sustainability, regulatory developments, work-

force trends, business strategy, and other key issues shaping the future of plastics.

The expanded conference and show floor programming are designed to equip attendees with practical insights, emerging perspectives, and actionable strategies. By prioritizing high-quality, attendee-first content across both the four-day conference and dynamic stage environments, NPE2027 reinforces its role as a premier platform for global knowledge exchange and professional growth.

The Future of Sustainable Plastics

NPE2027 will debut Sustainability Park, a new interactive destination showcasing industry leaders and real-world solutions shaping the future of sustainable plastics. Attendees can dive into interactive features like a 30-foot-wide ball pit, explore museum-style installations, and join fireside chats on trending topics.



Learn more and register at **NPE.org**.



NPE2027 Space Selection & Planning | March 2–5 in Orlando, FL

NPE2027 experienced exceptional early momentum during the Space Selection & Planning event, with 82% of the exhibit floor sold, including a complete sellout of the West Recycling & Sustainability Technology Zone. More than 1,105 companies participated in the event, selecting space across 1,128 booths and committing to 906,194 square feet of exhibit space. This represents one of the largest early sales totals in NPE history, underscoring strong exhibitor demand and industry enthusiasm for NPE2027. The event was also highly rated by exhibitors, earning

an overall satisfaction score of 4.1 out of 5. Attendees benefited from expanded educational programming, increased networking opportunities, and access to a larger vendor showcase than ever before. Space Selection & Planning also served as the launchpad for several exciting NPE2027 initiatives, including Sustainability Park, a new destination dedicated to sustainable plastics solutions, and the reimagined Exhibitor Guest Pass Program, designed to help exhibitors drive attendance, increase booth traffic, and maximize their return on investment.



New Exhibitor Guest Pass Program

The NPE Team has reimagined the Exhibitor Guest Pass Program for NPE2027, making it easier than ever to invite customers and prospects to attend. Exhibitors can now share guest pass invitations through a variety of channels, including SMS text messaging, Microsoft Teams, WhatsApp, WeChat, and more. The program's rewards have also been enhanced to

focus on maximizing exhibitor visibility and ROI. Top-performing exhibitors will have the opportunity to win high-value promotional prizes, including a featured video clip on NPE TV, a featured exhibitor listing in a post-show attendee email, a mobile app push notification during NPE2027, and recognition across NPE's social media channels.



Membership

As of June, PLASTICS represented over 600 member companies plus their various subsidiaries and plants for a total of more than 800 organizations. Our members range from small, family-owned businesses to global organizations with 20+ countries represented.

Who are our members?

Full Members

- **Material Suppliers:** Manufacturers and/or compounders of resins, fillers, stabilizers, pigments, and other components including bioplastics and recycled materials.
- **Equipment Manufacturers and Moldmakers:** Manufacturers of plastics processing equipment including primary machinery, secondary auxiliaries, molds, dies, tools, spare parts, and other components.
- **Processors:** Manufacturers of plastic products using methods including injection molding, blow molding, thermoforming, extrusion, transfer molding, compression molding, and other methods.

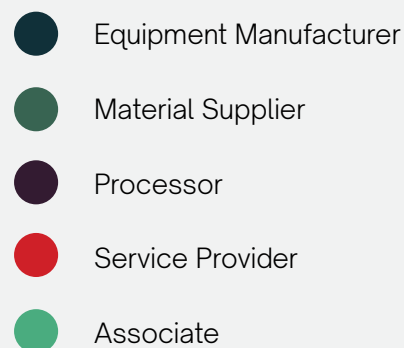
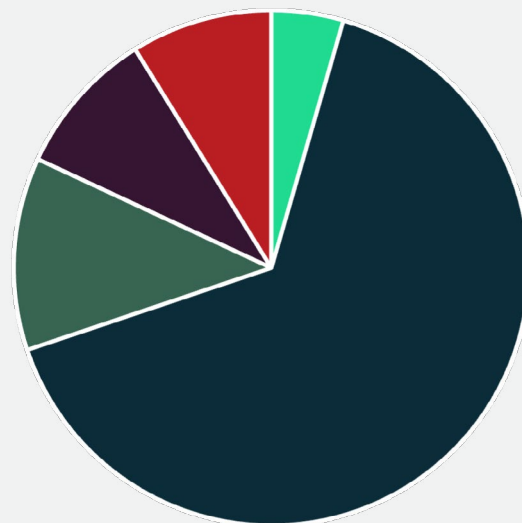
Service Providers

Any publishing, educational, research, or consulting organization devoting a significant part of its efforts to the plastics industry or rendering professional services to the industry (including banks, utilities, insurance companies, and economic development agencies).

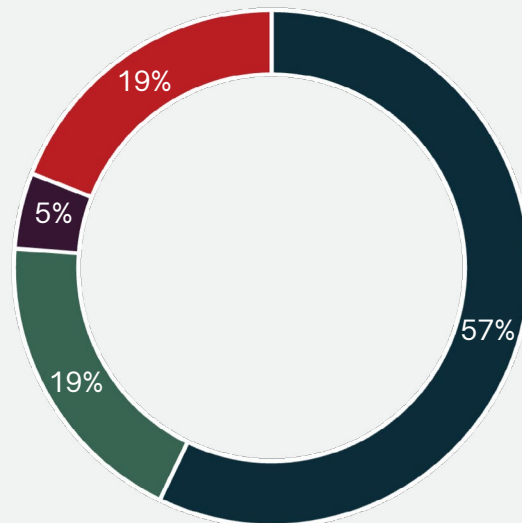
Associates

Any corporation, partnership or sole proprietorship that is not eligible for Full Membership, provided that it serves the plastics industry as a distributor or sales agent for plastics products, materials additives, or processing equipment and/or provides industrial services (such as transportation, contract packaging, warehousing, etc.) to plastics industry companies.

Member Companies by Type



New Members in 2026



2026 Annual Member Satisfaction Survey

In an annual Member Satisfaction Survey conducted in 2025, more than 360 members shared their thoughts on the most pressing issues the industry is facing and where PLASTICS can play a meaningful role in addressing these challenges.

Here are a few highlights:



Member Value

73% of respondents are very satisfied or satisfied with their membership.



Sharing With Peers

Almost half (48%) of members are considered promoters and are very likely to recommend PLASTICS membership to colleagues and peers.



Executive Engagement

3 out of 4 members say their organization is very/somewhat engaged in PLASTICS. Nearly two-thirds of C-Suite executives are actively engaged in the association.

Member Engagement

The top reasons respondents reported that they are a current member are:

Access to data, forecasts, or industry reports

Advocacy/
Government Affairs

Industry collaboration

Networking and connecting with other industry leaders

NPE

Survey Insights by Member Segment



Equipment Manufacturers Seek Market Foresight Amid Volatility

What Their Main Challenges Are:

- 56% cite supply chain disruptions
- 50% cite economic uncertainty/inflation
- 34% cite workforce or skill gaps
- Planning and forecasting are difficult amid market volatility

Why They Come to PLASTICS:

- Market intelligence and forecasting data (56%) are primary drivers of executive-perceived value
- Qualitative feedback suggests equipment manufacturers value PLASTICS' ability to provide a consolidated, industry-wide perspective that is difficult to replicate internally

PLASTICS provides foresight, helping equipment manufacturers anticipate market direction and make informed long-term investment and planning decisions.



Material Suppliers Rely on PLASTICS for Policy Leadership and Regulatory Alignment

What Their Main Challenges Are:

- 47% cite public perception of plastics as a top challenge; 39% cite regulatory pressure, bans, or compliance complexity
- Sustainability expectations and public scrutiny continue to intensify across the value chain

Why They Come to PLASTICS:

- PLASTICS is viewed as the industry's primary policy and advocacy voice
- Ability to align material suppliers with downstream stakeholders
- Access to timely regulatory updates and interpretation

PLASTICS provides influence and representation, advocating for material suppliers on regulatory, sustainability, and policy issues that directly affect their business.



Processors Turn to PLASTICS for Guidance on Compliance, Workforce, and Cost Pressures

What Their Main Challenges Are:

- 41% cite regulatory pressure, bans, or compliance complexity; 48% cite public perception challenges
- Regulatory and sustainability requirements add ongoing operational complexity

Why They Come to PLASTICS:

- Access to applied resources and best practices they cannot easily develop in-house
- Industry-wide standards and peer learning
- Events and convenings (including NPE) to understand market and operational trends

PLASTICS helps processors operate more effectively, translating industry trends, regulations, and sustainability expectations into actionable guidance, tools, and peer learning.



PLASTICS is committed to protecting, promoting, and growing the plastics industry, ensuring its continued success.



PLASTICS produces NPE: The Plastics Show, and other industry-leading events, creating new opportunities to showcase products, technology and innovation, while providing productive forums for learning and collaboration.



PLASTICS helps you stay compliant and keeps you abreast of the policy issues impacting your business—from government affairs to environmental health and safety to sustainability and beyond.

THE BENEFITS OF **PLASTICS** MEMBERSHIP



PLASTICS has unparalleled access to government officials to help you defend your business. As the voice of the plastics industry, we work with policymakers to ensure the regulatory environment is supportive of resin manufacturing and the continuing of business operations.



PLASTICS provides valuable insights to help run your business better, including equipment and machinery standards, economic and business data, equipment statistics, market trend reports, and other material that can be shared with employees and customers.

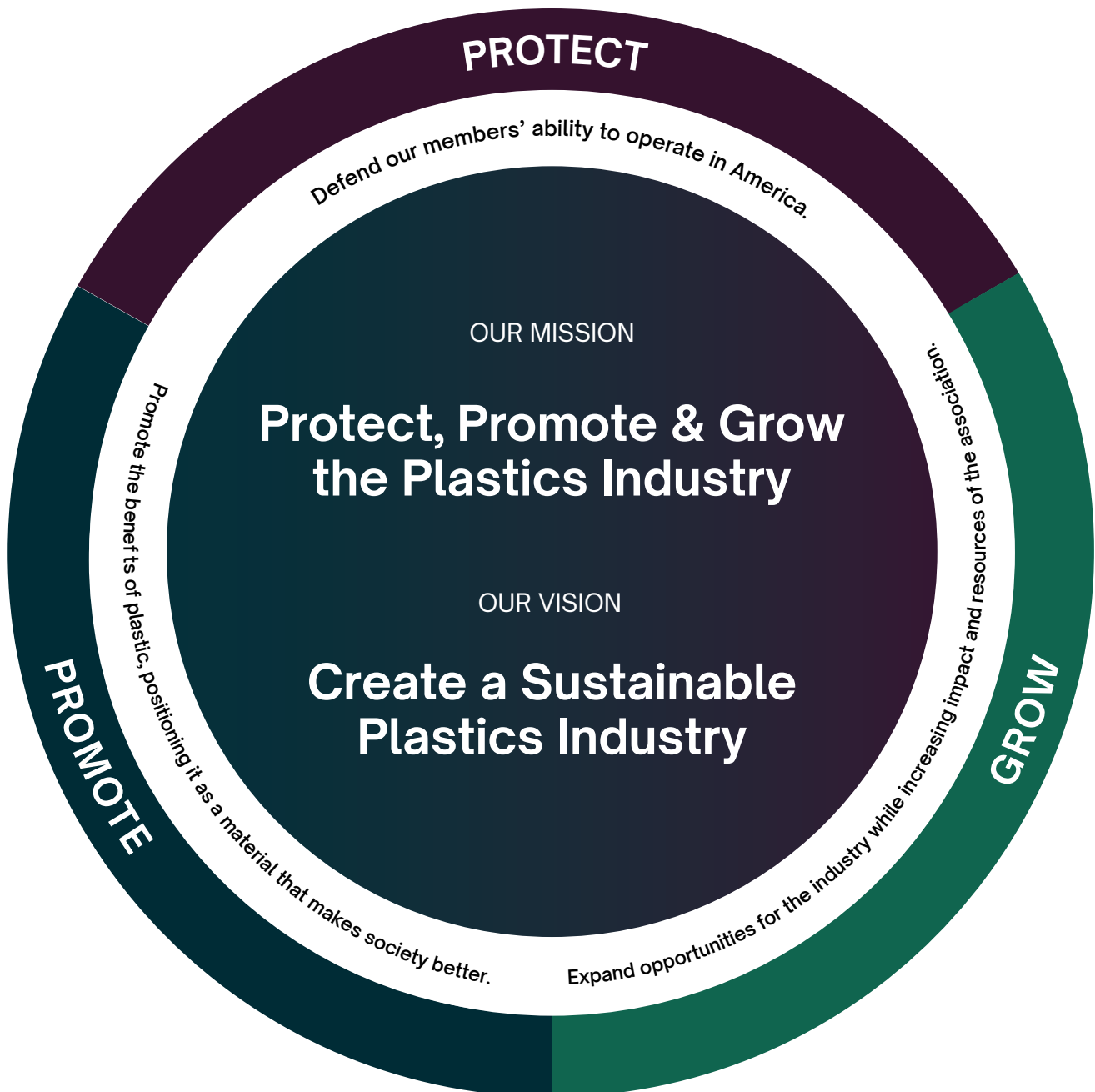


PLASTICS members enjoy significant savings on our various events and access to exclusive members-only opportunities.



Strategic Vision

In 2024, the PLASTICS Board of Directors adopted an updated strategic vision to create a sustainable plastics industry. This vision, built on the pillars of protect, promote, and grow, reinforces our commitment to safeguarding our members' ability to operate, showcasing the societal benefits of plastics, and expanding opportunities for the entire industry. This strategic focus will guide our efforts to ensure a robust and responsible future for the plastic industry.



International

At **PLAST Milan**, President & CEO Matt Seaholm sat down with Marco Mastosanti of Tecnoplast to discuss what's ahead for NPE2027. He also connected with NPE exhibitors, met with European industry leaders, and reinforced what makes #NPE2027 unlike anything else in the industry.



In October, the NPE team traveled to **K-Show in Dusseldorf, Germany**. While at K 2025, we launched the NPE2027 theme: Next Is Now, held an executive briefing and press conference sharing the PLASTICS Global Trends Report, and hosted a VIP reception for our key exhibitor partners from around the world.

Dr. Perc Pineda joined the **Plastics Summit Global Event in Lisbon, Portugal** on the panel on resilient industry and integrated management. Joined by representatives from Banco Santander, KPMG, UN Sustainable Development Solutions Network, and more, the panel addressed adaption needs for capacity demands while also adopting a foresight and preparedness approach to external forces.



Travels

Whether visiting and collaborating with members, representing our Association at an industry event, or taking the stage at a speaking engagement, members of the PLASTICS staff can be found pursuing our mission nationwide, all year long.



The Flexible Film Recycling Alliance Advisory Committee met in Portland for a peer collaborative and facility tour.



PLASTICS California Fly-In featured the Government Affairs and Policy teams in action working on SB88 and more.



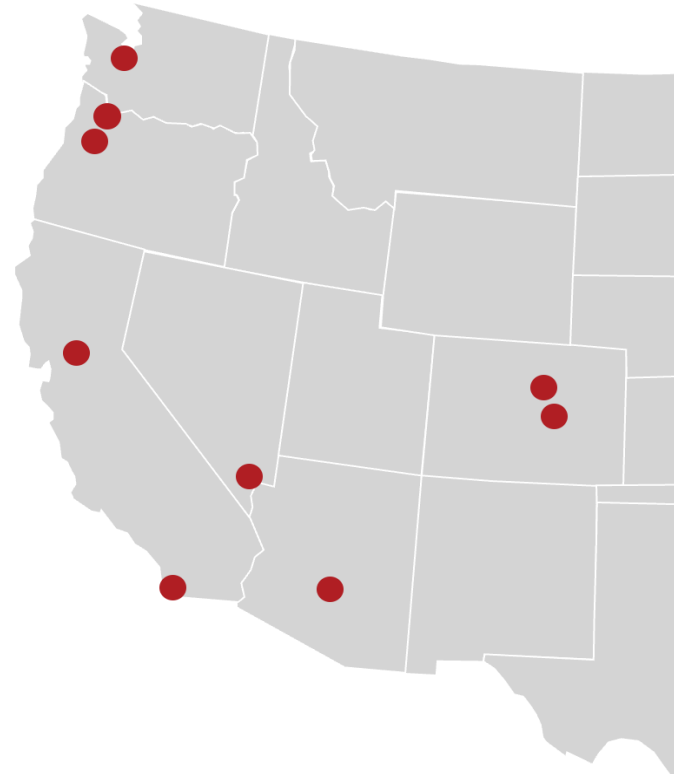
Andy Brewer, John Desmarteau, Hodayah Finman, and Troy Adkins represented the Flexible Film Recycling Alliance at the Plastics Recycling Conference in California.



FLiP hosted a breakfast meet-up as part of member activities at MD&M West in Anaheim.



Charlotte Dreizen testified in Colorado on the CO Cap for Resin Loss bill hearing.





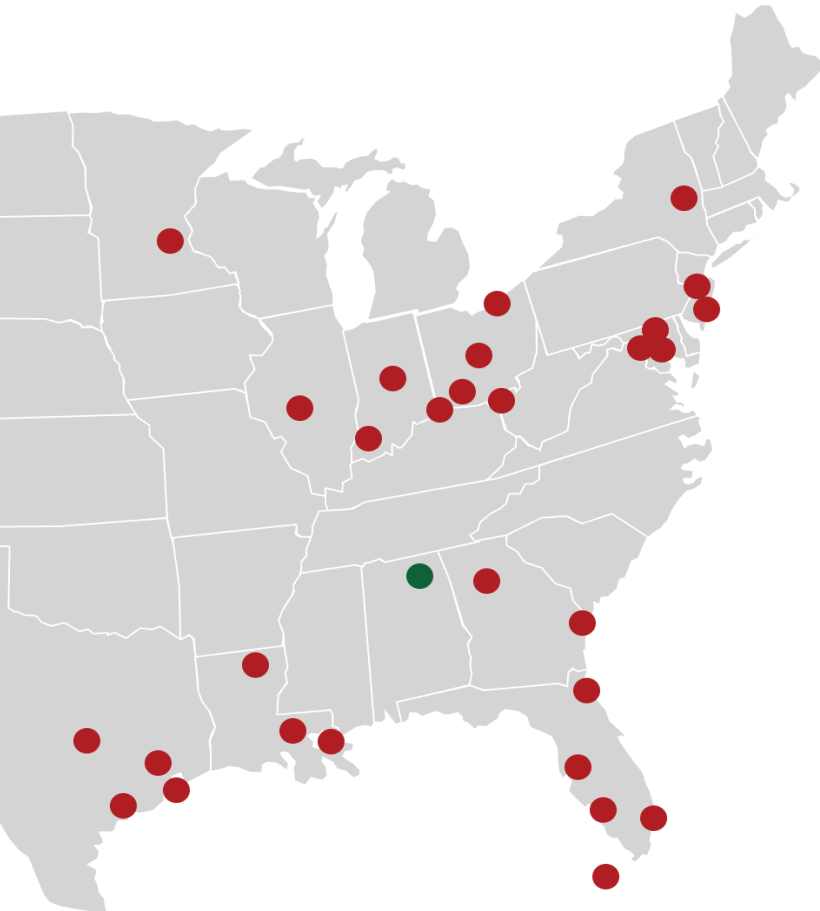
Recycling Committee Meeting in Indianapolis.



FLIP Meet-Up at AMI Plastics Show in Cleveland.



ISO Standards Committee hosted at Shibaura.



New York Fly-In



Equipment Council Executive Committee



PLASTICS Team at Women Breaking the Mold in Savannah, GA.



Novolux Tour in Florida



EVENTS

The PLASTICS Events and Marketing team continues to raise the bar, curating a best-in-class portfolio of events that serve the entire plastics value chain. With a focus on long-term planning and strategic outreach, we are proactively extending booking windows to ensure PLASTICS events are top-of-mind and firmly placed on industry calendars—early and often. Our commitment to excellence and foresight positions PLASTICS events as must-attend gatherings that drive engagement, innovation, and community across the sector.



FlexForum

Reinvigorating the North American Flexible Film and Bag Division Conference to better align with the organization's focus on processors, we rebranded the event to FlexForum: a future-forward brand focused on flexible packaging. This year's event also served as a meeting point for the Flexible Film Recycling Alliance Advisory Board Meeting.

2026 FDCPMC SPRING FOOD PACKAGING SUMMIT

Bringing together the Food, Drug, and Cosmetic Packaging Materials Committee, the Spring Packaging Summit focused on regulatory issues in the packaging space. From leveraging FDA status in new markets to staying ahead of key regulatory changes, the Spring Packaging Summit equipped attendees with the knowledge and insights to help businesses stay compliant and shape the future of food packaging.



VINYL WEEK

Co-locating our Vinyl Compounders Conference and the Vinyl Institute's Vinyl Sustainability Summit into Vinyl Week, created a unified platform focused on the success of the vinyl industry. The 2025 event in New Orleans, Louisiana set a strong foundation for continued success in Charlotte, North Carolina in December 2026.

Average Attendance Growth:

+8%

Average Satisfaction:

4.66/5



NATIONAL PLASTICS CONFERENCE

After a very successful 2024 event, the National Plastics Conference is back for 2025. Created to better represent the entire value chain, this valuable addition to our event portfolio fosters collaboration and growth within the industry. Our by industry, for industry agenda focuses on business trends, sustainability, policy, and much more.

250+
Attendees



OCS CON is back for 2025. Following up on our sold out 2024 debut, this year's event in Indianapolis, IN promises to bring together even more stakeholders from across the value chain. More details about the event are available in the Operation Clean Sweep section of this report.

SOLD OUT



Government Affairs

Over the past year, PLASTICS' Government Affairs team executed a focused advocacy strategy centered on three priorities: promoting the plastics industry as the cornerstone of American manufacturing, advancing competitive trade policy and tariff clarity, and accelerating recycling and circular manufacturing solutions. Through strategic engagement with Congress, the Administration, federal agencies, state policymakers and regulators, and coalition partners, the team strengthened the industry's influence while delivering meaningful policy outcomes across the country.

Promoting the Plastics Industry as a Cornerstone of American Manufacturing

A central focus of the year's efforts was reinforcing the plastics industry's role as one of the nation's most important manufacturing sectors. Through direct engagement with policymakers, PLASTICS highlighted the industry's contributions to economic growth, supply chain resilience, innovation, and job creation in every state and nearly every congressional district. The Association's largest-ever Washington Fly-In brought together more than 150 industry leaders for nearly 120 meetings with lawmakers, congressional staff, and Administration officials. The program also featured PLASTICS' first-ever White House Executive Roundtable, convening senior leaders from the White House, Department of Labor, Council on Environmental Quality, National Energy Dominance Council, and International Trade Administration to discuss manufacturing competitiveness, workforce development, domestic investment, and regulatory certainty. Throughout the year, PLASTICS conducted more than 200 Capitol Hill meetings and expanded executive-level engagement across the federal government.

Advancing Competitive Trade Policy & Tariff Clarity

Building on these manufacturing priorities, PLASTICS played a leading role in shaping trade and tariff policies affecting the industry's competitiveness. As the Administration's trade agenda evolved, the Association served as a key industry voice on Sec-

tion 232 tariffs, Section 301 investigations, USMCA implementation, and World Customs Organization amendments. Through direct engagement with USTR, the Department of Commerce, Congress, and other stakeholders, PLASTICS advocated for predictable trade policies, supply chain stability, and access to critical manufacturing inputs. These efforts helped ensure policymakers understood the implications of trade actions on domestic manufacturing, investment decisions, and long-term economic competitiveness.

Advancing Recycling & Circular Manufacturing

Advancing recycling and circular manufacturing remained a defining priority throughout the year. PLASTICS helped build bipartisan support for several key federal initiatives, including the Recycling Market Development and Advancement Act (RMAA), the Packaging Claims and Knowledge (PACK) Act, the Recycling Infrastructure Accessibility Act (RIAA), the Recycling and Composting Accountability Act (RCAA), and the STEWARD Act.

Through coalition leadership, congressional engagement, and advocacy with EPA and other agencies, the Association continued elevating mechanical and advanced recycling technologies, recycling infrastructure investment, and national recycling stan-



dards as critical components of a more circular and competitive manufacturing economy. PLASTICS also engaged extensively with EPA leadership and Congress on advanced recycling policy, helping build greater awareness and understanding of the technology's environmental and economic benefits. These efforts contributed to EPA Administrator Lee Zeldin publicly recognizing advanced recycling as a significant opportunity for both environmental progress and domestic manufacturing growth.

In addition to advancing federal legislation, PLASTICS led a broad-based coalition effort urging FTC Chairman Andrew Ferguson to modernize the Green Guides, advocating for updated national guidance that reflects advancements in recycling technologies, recycled content, advanced recycling, and mass-balance accounting.

Regulatory Leadership & Science-Based Advocacy

Regulatory Affairs complemented these efforts by providing members with early intelligence and strategic advocacy on emerging regulatory issues. The team identified and responded to the federal government's first regulatory actions related to microplastics, successfully advocated for and achieved improvements to FDA's new post-market chemical review program and helped shape policy discussions surrounding GRAS modernization and food-contact materials. PLASTICS also submitted significant comments supporting the classification of advanced recycling technologies as manufacturing processes, provided industry input on EPA's TSCA Risk Evaluation Framework rulemaking, including how to resolve the backlog of substances awaiting review without new legislation, and advocated for practical implementation of EPA's TSCA Section 8(a)(7) PFAS reporting requirements. Together, these efforts reinforced the Association's reputation as a trusted technical and regulatory resource while advancing science-based policymaking across a range of issues affecting plastics manufacturers.

Expanding Influence in the States

At the state level, PLASTICS significantly expanded its advocacy footprint and influence across both its Eastern and Western regions. The Association



strengthened member engagement through new regional programming, enhanced coordination with contract lobbyists and alliance partners, and high-impact fly-ins and advocacy days in California, New York, and Illinois. These efforts expanded PLASTICS' presence in key state capitals, strengthened relationships with lawmakers and regulators, and elevated the industry's voice on manufacturing, recycling, and sustainability issues.

These investments translated into meaningful policy victories. Most notably, PLASTICS helped defeat New York's anti-industry packaging EPR proposal (S.1464-A/A.1749-A) for the third consecutive legislative session, preventing a costly and unworkable framework while continuing to advocate for more practical recycling solutions.

The Association successfully defeated multiple state proposals targeting expanded polystyrene (EPS), including Alaska's HB 25, Illinois' SB 1531, and Connecticut's HB 5524, while also helping stop Washington's post-consumer recycled content mandate (HB 2271), Colorado's Plastic Pollution Awareness Week resolution (SJR 26-022), and several Hawaii labeling proposals.

In California, PLASTICS led the industry's response to AB 2253, legislation that would have prohibited mass-balance accounting and undermined advanced recycling and circular manufacturing investments. The Association also led advocacy efforts on AB 1812 and AB 2034 while continuing to strengthen relationships with lawmakers, regulators, and key



stakeholders in one of the nation's most influential policy environments. Additionally, PLASTICS secured important amendments to Colorado's Zero Resin Loss legislation (SB 26-016), removing proposed criminal liability provisions and improving the final legislation.

Leading Through Strategic Alliances, Coalitions & Partnerships

PLASTICS expanded its influence and policy impact through a combination of strategic alliances, coalition leadership, and cross-sector partnerships that advanced the industry's priorities at the federal, state, and local levels.

A cornerstone of these efforts was PLASTICS' leadership of its Strategic Alliance programs, which continued delivering meaningful policy and advocacy victories across the country. Through the Coalition for Protein Packaging (CPP), PLASTICS secured categorical exemptions for FDA- and USDA-regulated food packaging in major EPR laws in California, Maryland, and Washington, helping preserve access to safe and essential food packaging. Through the American Recyclable Plastic Bag Alliance (ARPBA), PLASTICS helped defeat eight anti-plastic bag proposals during the legislative cycle, including statewide plastic bag ban proposals in Washington and Illinois, while successfully opposing preemption repeal efforts in Idaho, Florida, Minnesota, Michigan, and Oklahoma. The Polystyrene Recycling Alliance (PSRA) continued demonstrating the viability of expanded polystyrene recycling through innovative public-private partnerships, including a successful collaboration with the City of Nashville that expanded EPS collection and recycling opportunities while highlighting the value of investments in recycling infrastructure and end-market development.

PLASTICS also strengthened its leadership through broader coalition engagement. The Association continued leading the We Recycle Working Group (WRWG), a coalition of 26 trade associations dedicated to educating federal policymakers on the critical role recycling plays in supporting U.S. manufacturing, economic growth, and environmental sustainability. Throughout the year, WRWG convened policymakers, industry leaders, and stakeholders through educational programming, including policy forums featuring senior EPA officials and staff leadership from the Senate Environment and Public Works Committee.



In addition, PLASTICS expanded its engagement through participation in the Recycling Leadership Coalition, a broad alliance of trade associations and companies advocating for the Recycled Materials Attribution Act (RMAA). The coalition advanced efforts to establish national definitions for recycling and recycled content while supporting federal recognition of mass-balance accounting and greater regulatory certainty for circular manufacturing investments.

PLASTICS further expanded its leadership on food-contact and regulatory policy as a founding member of the Food Contact Safety Coalition. The coalition brings together stakeholders from across the food, packaging, and manufacturing value chains to advance science-based policies and coordinated advocacy on federal and state issues involving Generally Recognized as Safe (GRAS) determinations, food-contact materials, and broader food safety regulations.

Looking Ahead

Together, these accomplishments reflect a Government Affairs program operating at an unprecedented level of influence and effectiveness. By championing the plastics industry's role as a cornerstone of American manufacturing, advancing competitive trade policies, and driving progress on recycling and circular manufacturing, PLASTICS continues to strengthen the industry's position and shape the policy landscape for the future.

2026 Government Affairs Scorecard

Promoting the Plastics Industry as a Cornerstone of American Manufacturing

Hosted PLASTICS' Largest-Ever Washington Fly-In

- 150+ industry leaders from across the plastics value chain
- Nearly 120 meetings with Members of Congress, congressional staff, and Administration officials
- Elevated industry priorities related to manufacturing competitiveness, tax policy, trade, recycling, and workforce development

Convened First-Ever White House Executive Roundtable

- Featured senior officials from the White House, Department of Labor, Council on Environmental Quality, National Energy Dominance Council, and International Trade Administration
- Positioned plastics manufacturing as a critical contributor to U.S. economic growth, innovation, and supply chain resilience

Expanded Federal Engagement

- Conducted more than 200 Capitol Hill meetings
- Strengthened engagement with EPA, FDA, FTC, Commerce, USTR, and other federal agencies
- Advanced policies supporting domestic manufacturing investment and competitiveness

Advancing Competitive Trade Policy & Tariff Clarity

Led Industry Engagement on Key Trade Issues

- Section 232 tariffs
- Section 301 investigations
- USMCA implementation
- World Customs Organization (WCO) amendments

Submitted Formal Comments and Conducted Direct Advocacy

- Engaged USTR, Department of Commerce, congressional offices, and Administration officials
- Advocated for tariff clarity, supply-chain stability, and access to critical manufacturing inputs

Delivered Timely Trade Intelligence to Members

- Provided regular updates and analysis on evolving trade actions and tariff developments
- Ensured member companies remained informed and engaged as federal trade policy evolved

Advancing Recycling & Circular Manufacturing

Federal Legislative Leadership

Recycling Market Development and Advancement Act (RMAA) – H.R. 7502

- Helped secure additional congressional support
- Led coalition engagement supporting Senate introduction efforts

Packaging Claims and Knowledge (PACK) Act – H.R. 6832

- Advanced efforts to establish national packaging claims standards
- Supported Senate introduction efforts

Recycling Infrastructure Accessibility Act (RIAA) – H.R. 2145

- Supported bipartisan House Energy & Commerce Committee passage

Recycling & Composting Accountability Act (RCAA) – H.R. 4109

- Advanced national recycling data modernization and reporting improvements



STEWARD Act – S.351

- Supported Senate passage
- Advanced recycling infrastructure and recycling access initiatives

Advanced Recycling Leadership

Elevated Advanced Recycling as a Manufacturing Solution

- Conducted dedicated Advanced Recycling Fly-In with Congress and EPA
- Advanced recognition of advanced recycling as a critical component of circular manufacturing

EPA Engagement

- Contributed to EPA Administrator Lee Zeldin publicly recognizing advanced recycling as a significant environmental and economic opportunity
- Advanced industry priorities related to advanced recycling permitting and regulatory certainty

FTC Green Guides Modernization

- Led a broad-based coalition effort urging FTC Chairman Andrew Ferguson to modernize the Green Guides
- Advocated for updated guidance reflecting advanced recycling, recycled content, mass-balance accounting, and emerging recycling technologies

Regulatory Leadership & Science-Based Advocacy

Microplastics

- Provided members with early notice of the federal government's first regulatory actions related to microplastics
- Coordinated industry response and technical comments

FDA Post-Market Chemical Review Program

- Successfully advocated for improvements to FDA's final framework
- Advanced science-based decision-making and protection of confidential business information

GRAS & Food Contact Materials

- Identified and elevated concerns surrounding federal and state GRAS proposals
- Helped launch broader coalition engagement on food-contact material issues

TSCA

- Submitted comments on EPA's TSCA Risk Evaluation Framework rulemaking
- Advocated for practical implementation of EPA's TSCA Section 8(a)(7) PFAS reporting requirements

Advanced Recycling

- Submitted comments supporting EPA's proposal to regulate advanced recycling as manufacturing rather than waste incineration

Expanding Influence in the States

Expanded Advocacy Presence Across Eastern and Western Regions

- Enhanced regional member engagement, coordination, and programming
- Expanded participation and leadership within CPP and PSRA
- Strengthened relationships with state lawmakers, regulators, and stakeholders

Conducted Major State Advocacy Fly-Ins

- California
- New York (two fly-ins)
- Illinois

Conducted 75+ Meetings with State Policymakers, Staff, and Regulators Through CPP and ARPBA Advocacy Efforts

Key Legislative Victories

ALASKA

HB 25 – Polystyrene Ban

Helped defeat legislation restricting EPS foodservice packaging

NEW YORK

S.1464-A / A.1749-A – Packaging EPR Legislation

Helped defeat New York’s anti-industry packaging EPR proposal for the third consecutive legislative session

CALIFORNIA

AB 2253 (Boerner) – Mass-Balance Accounting

Led opposition to legislation that would prohibit mass-balance accounting

Defended advanced recycling and circular manufacturing policies

AB 1812 (Aguiar-Curry) – Compostable Product Labeling

Led advocacy efforts to secure practical amendments

AB 2034 (Addis) – State GRAS Proposal

Helped defeat legislation creating a state-level food ingredient review framework

ILLINOIS

SB 1531 – Expanded Polystyrene Ban

Helped defeat legislation restricting EPS foodservice packaging

HB 1146 – Statewide Plastic Bag Ban

Helped defeat legislation restricting plastic carryout bags statewide

CONNECTICUT

HB 5524 – Expanded Polystyrene Ban

Helped defeat legislation restricting EPS packaging

WASHINGTON

HB 2271 (Berry) – PCR Mandate Proposal

Helped defeat duplicative reporting and fee requirements Statewide Plastic Bag Ban Proposal

Successfully opposed legislation establishing a statewide plastic bag ban

COLORADO

SB 26-016 (Cutter) – Zero Resin Loss Legislation

Secured removal of criminal liability provisions

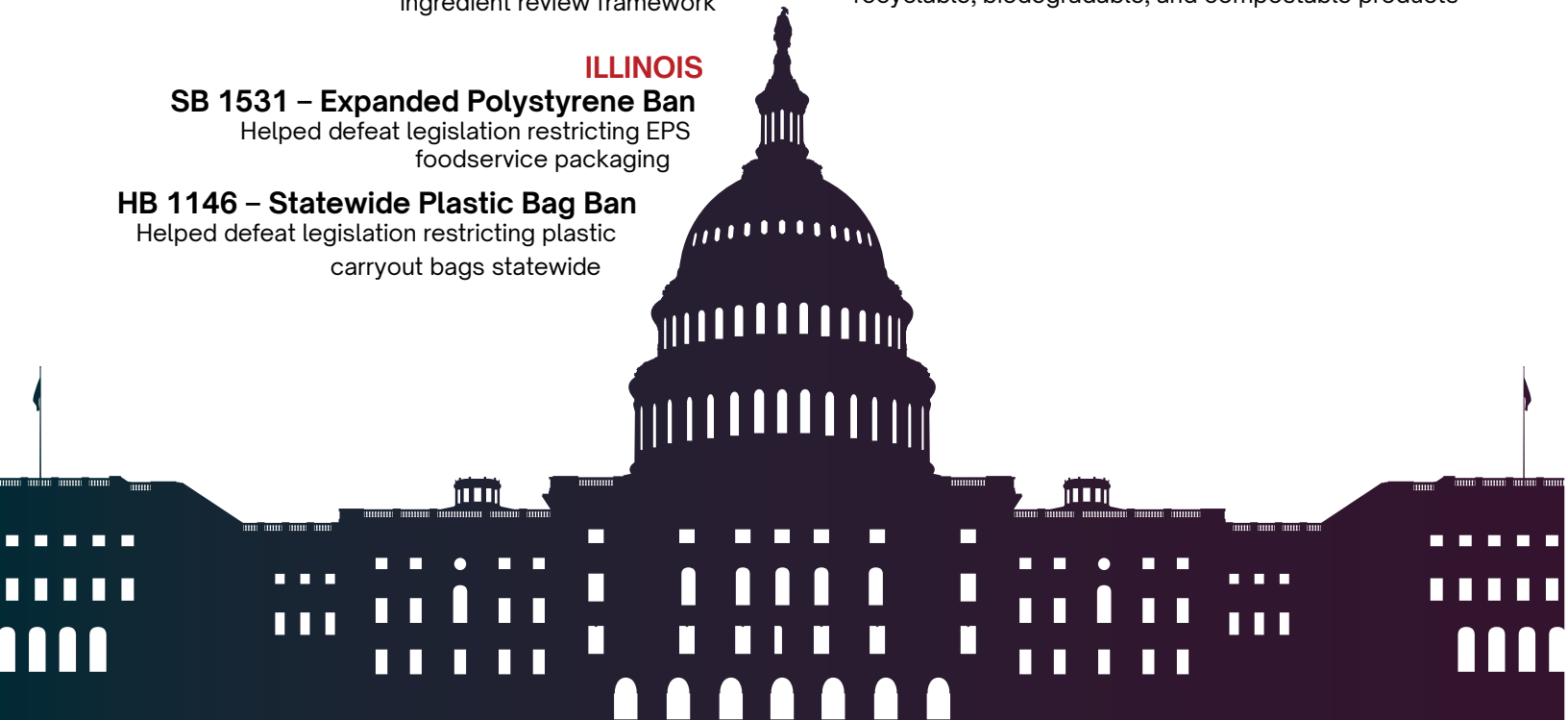
SJR 26-022 (Cutter) – Plastic Pollution Awareness Week Resolution

Helped defeat legislation containing misleading claims regarding plastics and microplastics

HAWAII

HR 195, HCR205, SR 128, SCR 136

Helped defeat labeling study proposals affecting recyclable, biodegradable, and compostable products





Leading Through Strategic Alliances, Coalitions & Partnerships

Strategic Alliance Victories



Coalition for Protein Packaging (CPP)

- Secured categorical exemptions for FDA- and USDA-regulated food packaging in California, Maryland, and Washington EPR laws
- Helped preserve access to safe and essential food packaging while avoiding unintended regulatory burdens



American Recyclable Plastic Bag Alliance (ARPBA)

- Defeated eight anti-plastic bag proposals nationwide
- Defeated statewide plastic bag ban proposals in Washington and Illinois
- Successfully opposed preemption repeal efforts in Idaho, Florida, Minnesota, Michigan, and Oklahoma



Polystyrene Recycling Alliance (PSRA)

- Partnered with the City of Nashville on a high-profile EPS recycling initiative
- Expanded recycling access and demonstrated the viability of EPS recycling
- Highlighted the value of recycling infrastructure investment and end-market development
- Generated positive visibility for plastics recycling innovation



We Recycle Working Group (WRWG)

- Continued leadership of 26-trade-association coalition
- Hosted federal policy forum featuring senior EPA officials and Senate Environment & Public Works Committee staff leadership
- Advanced education and advocacy on recycling, circular manufacturing, and manufacturing competitiveness

Recycling Leadership Coalition

- Participated in a broad coalition supporting the Recycled Materials Attribution Act (RMAA) – H.R. 7502
- Advanced national definitions for recycling and recycled content
- Supported federal recognition of mass-balance accounting

Food Contact Safety Coalition

- Served as a founding member
- Advanced science-based advocacy on federal and state GRAS issues, food-contact materials, and food safety regulations
- Expanded partnerships across the food, packaging, and manufacturing value chains

Statistics and Safety

Committee on Equipment Statistics

The PLASTICS Committee on Equipment Statistics (CES) tracks and reports on new orders and shipments of plastics machinery on a monthly and quarterly basis. Drawing from data submitted by suppliers of injection molding machines, extruders, blow molding machines, plasticating screws, auxiliary equipment, and hot runners, the program enables participants to benchmark their operations against current market trends across all major machinery sectors. CES statistical reports provide exclusive insights, representing a significant share of the North American plastics machinery market, and serve as a key economic indicator for the broader plastics industry. This past year, the program successfully transitioned to a new third-party vendor to manage the secure data portal and generate reports.

Machinery Safety Standards Program

The Machinery Safety Standards Program made significant progress in 2026, advancing revisions to two key machinery safety standards covering injection molding machines and extruders. Additionally, a strategic plan was developed to guide the Program initiatives and priorities in the years ahead.

Stakeholder Engagement

The strength of the PLASTICS Machinery Safety Standards Program depends on active industry participation. Manufacturers of plastics machinery, suppliers of auxiliary equipment, processors, machine users, service providers, and other stakeholders are encouraged to participate in the standards development

process. Their collective expertise plays a vital role in ensuring that technical requirements not only reflect a diverse range of industry perspectives but also promote practical, consensus-driven solutions that enhance machinery safety throughout the plastics manufacturing sector.

As the industry continues to evolve, staying engaged and informed is essential for driving safety standards that protect both workers and equipment alike.

International Standards (ISO)

The growing influence of the International Technical Committee for Plastics Machinery, ISO/TC 270, is an important development for the industry. ISO/TC 270 is currently developing a new international standard covering extruders and related ancillary equipment, with publication anticipated mid-to-late 2027. The committee also plans to begin a revision of the injection molding machines standard (ISO 20430), as well as begin work on a new standard for blow molding machines.

Once these international standards are published, they will likely be widely adopted around the world, which may impact OEMs looking to export machinery into these markets. We encourage members who might be affected by these developments to actively engage in the standards-development process. Strong US participation is essential to ensuring that the needs and perspectives of the US plastics industry are represented in these international discussions. Participation at the international level also helps to inform the ANSI standards work as we will convene our ANSI committees to consider national adoption of these international standards.



Looking Ahead

PLASTICS plans to release an updated standard for injection molding machines (B151.1) in late 2026. We are also on track to publish an update to our extruder standard (B151.7) in early 2027. Both updates are significant, and companies that manufacture, service, or use these machines will want to obtain a copy. This work reflects PLASTICS' ongoing commitment to maintaining current, practical, and effective safety requirements for plastics processing machines.

Communications

The Communications team uses earned media and social and digital media to highlight the essential role plastics play in everyday life, and to promote policies that enable innovation, sustainability and industry leadership. The Communications team works closely with other departments to ensure the industry's perspective informs conversations among policymakers, media, members and the public.

New Leadership

In May 2026, PLASTICS welcomed Shira Rawlinson as Vice President of Communications. Rawlinson is a key hire, as she brings nearly two decades of strategic communications leadership in her work at the U.S. Chamber of Commerce, advocacy and legal organizations, and government agencies. Her experience and skill are key to PLASTICS' goal of reinvigorating its communications program, strengthening its voice, its impact and positioning it as an industry leader.

Earned Media

Earned media continues to play an important role in shaping public debate through press coverage, opinion pieces and thought leadership. The team secured coverage in influential outlets including Politico, CNBC and Fox Business, and placed opinion pieces in outlets like the Orange County Register and the Milwaukee Journal Sentinel to amplify member stories and reinforce key advocacy priorities at the local level.

Social and Digital Media

The communications team strategically uses social and digital media to amplify policy priorities and thought leadership, and drive traffic to the PLASTICS website. In the first six months of 2026, nearly 9,000 visits came to the PLASTICS website by clicking on content posted on PLASTICS-owned social channels. This made up about 10 percent of the traffic directed to the website, an increase from the 8 percent seen in the previous six months.

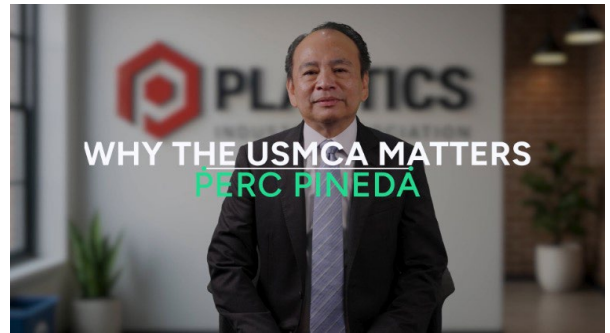


In partnership with Industry Engagement, the Communications team transformed “FLiP Files” from a static member spotlight into a monthly video series that showcases the career journeys of Future Leaders in Plastics members and encourages more young professionals to get involved in the industry. We’ve seen increased engagement on LinkedIn after moving from static posts to videos. As of July 2026, engagement rates increased from 5 percent to 6 percent, while click through rates doubled from 2 percent to 4 percent.

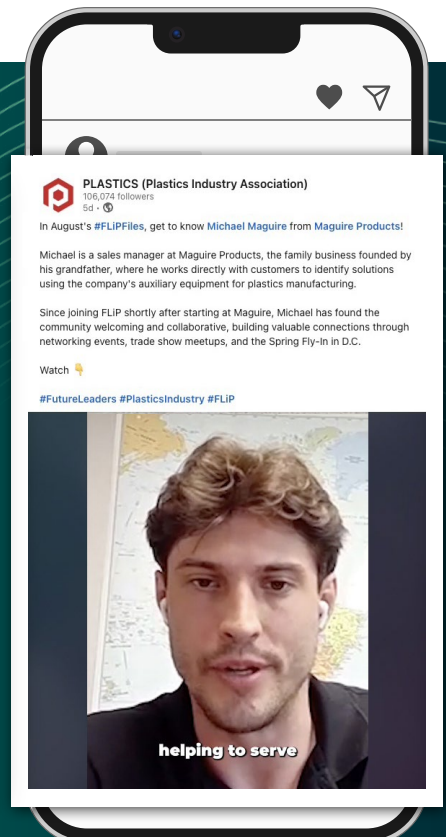
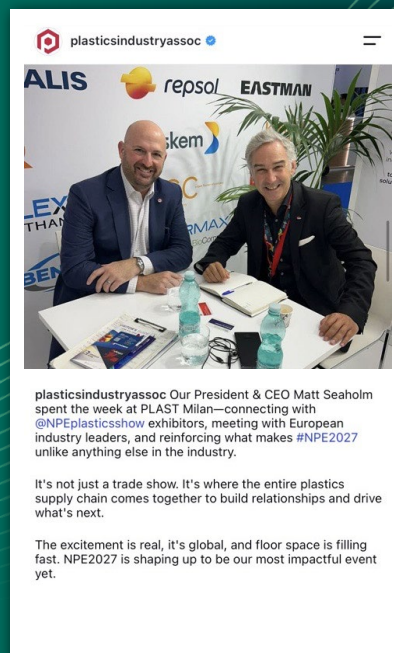
PLASTICS Studio

To expand the association's multimedia capabilities, the communications team launched the PLASTICS Studio, an in-house production space for video production, webinars, and livestreams. The studio has expanded PLASTICS' ability to produce high-quality content, from member updates and industry news to thought leadership, such as PLASTICS Chief Economist Perc Pineda's monthly videos analyzing trends affecting the plastics industry. Dr. Pineda's videos have been viewed almost 3,500 times since we started producing these videos in February 2026.

Whether supporting advocacy efforts, engaging the media, or creating compelling digital content, the Communications team continues to shape coverage, strengthen the industry's voice, and advance PLASTICS' mission.



PLASTICS on Social Media





PLASTICS in the Press

PLASTICS' Communications team stays connected across national, trade and local media to ensure the plastics industry's voice is included in the stories and conversations shaping our key priorities.

Forbes MÉXICO

The plastics industry in Mexico and the United States is calling for a renewal of the USMCA.

"PLASTICS and ANIPAC welcome the ongoing dialogue between the U.S. and Mexican governments as part of the USMCA review process. This collaboration is essential to strengthening North American competitiveness," the business representatives stated.



Inflation inside the electronics you buy may soon become a bit more sticky

"What's happening right now underscores the importance of building resilient supply networks that support American manufacturers, businesses, and the consumers who depend on plastic products every day," said Matt Seaholm, president and CEO of the trade group, while also noting that the current resin supply chain is moving. "Global supply disruptions affect every industry, and plastics are no exception. The U.S. has a strong domestic manufacturing and materials base that helps keep resin supply chains moving during periods of uncertainty," Seaholm said.

milwaukee journal sentinel

PART OF THE USA TODAY NETWORK

Plastic powers Wisconsin recycling and invests in our future | Opinion

The plastics industry continues to invest in infrastructure, equipment and workforce training to recover more plastic waste and ensure it is reused rather than disposed of.

Matt Seaholm Special to Milwaukee Journal Sentinel
Dec. 16, 2025, 5:00 a.m. CT

"Recycling is real, and we're doing it here at Plastic Ingenuity in Madison, Wisconsin." Those are the words of a dedicated employee at [Plastic Ingenuity](#), where more than thirteen million pounds of post-consumer material are recycled every year. Their team transforms used plastics into products that touch nearly every part of our lives — helping food stay fresher longer, safeguarding medical devices and delivering the everyday essentials people rely on across Wisconsin and the entire country.



THE ORANGE COUNTY REGISTER

Anyone who has visited a modern recycling facility — like [Amcor in Chino](#) — knows that plastic recycling does not “hardly” exist. Today’s facilities rely on advanced sorting technology, automation, and skilled workers to recover materials at a scale and precision unimaginable a generation ago. Advanced recycling technologies now break plastics down to their molecular building blocks, allowing them to be remade into new products — again and again — from food packaging to automotive components.

POLITICO

FLYING IN: The **Plastics Industry Association** and the **American Chemistry Council** are hosting their joint legislative fly-in in Washington this week. Plastics manufacturers, recyclers and suppliers will meet with lawmakers and administration officials to advocate for fair and predictable trade policy, accelerating recycling and circular manufacturing, and reinforcing the industry’s role in U.S. manufacturing.

THE ORANGE COUNTY REGISTER

OPINION

California should lead on recycling — not lower the bar



Joel Iolas of OC Recycling Center dumps plastic bottles collected by a Recycle From Home van, background, into a dumpster during the ribbon cutting ceremony for the reopening of the OC Recycling Center at Orange Coast College in Costa Mesa on Wednesday, Feb. 19, 2025. (Photo by Leonard Ortiz, Orange County Register/OCN)

By IVY BRITTAIN

PUBLISHED: February 19, 2026 at 5:00 AM PST | UPDATED: February 19, 2026 at 9:06 AM PDT



THE OKLAHOMAN

Plastics industry has strong recycling campaign underway | Opinion

Matt Seaholm Guest Columnist
April 21, 2026, 6:30 a.m. CT

Recycling is something most Americans interact with every day — but few get to see how it actually works. At a time when communities are focused on reducing waste, understanding the recycling process — and the role each of us plays in it — has never been more important.



Nashville to open city’s first foam recycling drop-off location

Mayor Freddie O’Connell will be joined by members of the Nashville Department of Waste Services (NWS), in collaboration with the [Polystyrene Recycling Alliance](#) (PSRA), [Foam Cycle](#) and the [Plastics Industry Association](#) (PLASTICS).



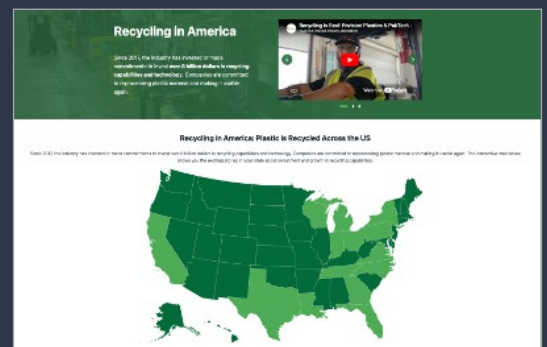
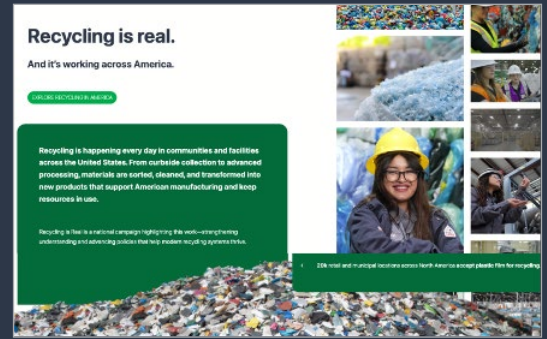
Launched in 2023, Recycling is Real (RIR) documents how recycling works in practice across the U.S. every day. We've released over 20 videos filmed on location to highlight the people, facilities and technologies that make recycling possible. In 2026, RIR became a centralized educational platform for plastics recycling where policymakers, industry stakeholders, media, and the public can access videos, educational resources, fact sheets and credible information on plastics recycling.

PLASTICS also formed the We Recycle Working Group, a coalition of 26 organizations that develop educational resources for elected officials and staff, aligns on recycling-focused messaging and coordinates outreach efforts that reinforces the value of a strong, collaborative recycling system.

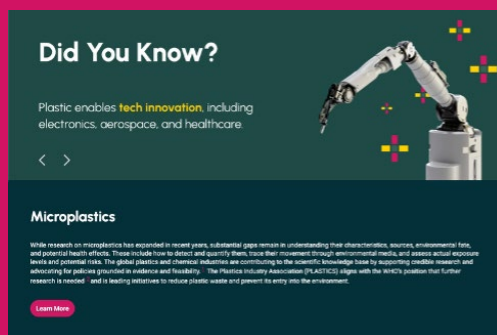
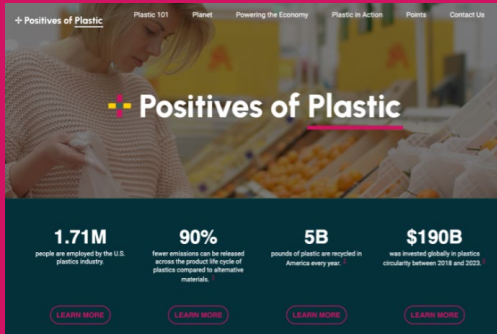
In April 2026, RIR launched a targeted paid media campaign to support the PLASTICS Spring Meeting and Congressional Fly-in, connecting policymakers, industry leaders and the public with educational content on plastics recycling. The campaign has generated more than 1.5 million targeted impressions, with campaign videos viewed to completion more than 100,000 times. Paid media has driven more than 2,000 visits to the website, at a 0.13 click-through rate well within industry benchmarks.

Since January 1, 2026, almost 20,000 users visited the RIR website, up 21.2 percent from the previous timeframe. RIR social media accounts on LinkedIn, Facebook, Instagram and X, launched in April, has generated more than 500,000 views across all platforms.

The communications team paired these efforts with local op-eds and member videos spotlights to create a “surround sound” effect that reinforced the same recycling message across multiple platforms in tandem.



recyclingisreal.org



Positives of Plastic

Positives of Plastic (POP) is an educational platform offering members and the public fact-based information on the role plastics play in modern life, addressing common misconceptions with content on the science, innovation and everyday benefits of plastics.

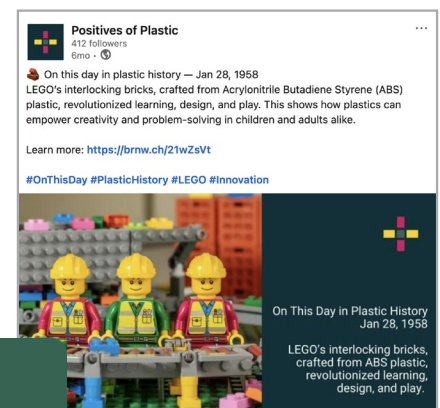
The website has five core sections:

- **Plastic 101**, which explains the fundamentals of plastics;
- **Plastic and the Planet**, which explores sustainability and circularity;
- **Powering the Economy**, which highlights plastics' economic impact;
- **Plastic in Action**, which showcases the material's role across industries and everyday life; and
- **Points**, which provides a growing library of downloadable fact sheets and educational resources.

Since January 1, 2026, more than 4,000 users have visited the POP website, spending an average of nearly three minutes on the site's most popular pages: Plastics 101, Plastics in Action, Points, and Powering the Economy. Paid LinkedIn campaigns have driven over 10 percent of the website traffic.

POP social media channels, launched in early December, have grown steadily. POP has 748 followers across all platforms and have earned more than 44,000 impressions, more than 1,000 likes, comments, shares and clicks—a 7.58 percent interaction rate, more than double the industry standard of three percent.

By making science-based content easy to find and understand, POP helps foster more informed conversations about the role plastics play in our economy, our communities, and everyday life.



Visitors can also ask questions through **Poppy**, the platform's **AI-powered chatbot**, which provides fact-based answers about plastics and directs users to relevant content.

Economics and Industry Research

PLASTICS provides valuable insights to help run your business better—including workforce data, economic environment, equipment statistics, market trends, and other resources shareable with employees and customers. Whether tracking industry-wide developments, domestic/global economic outlooks, or specific vertical trends, PLASTICS Economics and Industry Research delivers the content members need for smart decisions—whether weekly, monthly, quarterly, or annually, we’ve got you covered on economic and business insights.



2025 Global Trends Report

PLASTICS unveiled its 2025 Global Trends Report at K 2025 in Düsseldorf, Germany. Chief Economist Dr. Perc Pineda reported that U.S. plastics exports rose 4.4% in 2024 while imports increased 2.4%. Mexico (\$19.8 billion) and Canada (\$14.3 billion) remained the industry’s largest export markets. Although the U.S. recorded a \$4.3 billion resin trade surplus with China, deficits in equipment, molds, and products resulted in a net plastics trade deficit of \$12.4 billion.

SCAN TO
DOWNLOAD



2026 Size & Impact Report

PLASTICS released its annual Size and Impact report during the National Plastics Conference in Houston, TX. The association’s flagship analysis highlighted the plastics industry’s continued contribution to the U.S. economy. Key insights included:

- The U.S. plastics industry supported more than X,XXX,XXX jobs and generated \$XXX.X billion in shipments in 2025. Including supplier industries, employment rises to X.XX million jobs and shipments to \$XXX.X billion. Including downstream industries, the plastics value chain supports over 44 million jobs across the U.S. economy.
- Plastics manufacturing employment grew X.X% annually from 2015 to 2025, outpacing overall manufacturing growth.
- The industry ranked as the eighth-largest U.S. manufacturing industry in 2023, the latest year available.

SCAN TO
DOWNLOAD





Plastics Demand Estimate

June 17, 2025

The Plastics Industry Association (PLASTICS) has released its April 2025 Plastics Demand Estimate for the U.S., a key indicator for plastics processors and the broader plastics supply chain.

In April 2025, U.S. plastics demand was estimated at \$22.7 billion—a 0.2% increase month-over-month and 0.4% year-over-year. However, when adjusted for producer price inflation, demand declined by 0.1% from both the previous month and the same month a year earlier. The marginal change in inflation-adjusted demand suggests that producer prices remain relatively stable.

Month	Millions	% Change, M/M		% Change, Y/Y	
		Current Prices	Real (\$ 2008)	Current Prices	Real (\$ 2008)
2024					
Apr-24	22,837.3	0.7	0.2	2.5	2.9
Mar-24	22,800.5	1.1	1.3	3.7	3.8
Feb-24	22,556.8	-0.3	-0.2	3.5	3.7
Jan-24	21,777.0	1.4	1.5	3.3	2.8
Dec-23	23,464.4	-2.3	-2.6	1.7	-0.7
Nov-23	22,011.5	1.3	1.1	2.8	1.5
Oct-23	22,878.0	0.3	0.4	1.8	0.6
Sep-23	22,863.7	-1.4	-1.3	-0.1	-1.1
Aug-23	22,200.0	1.5	1.5	1.0	0.0
2025					
Jan-25	23,049.8	0.3	0.0	0.2	-0.9
Feb-25	22,753.7	-1.4	-1.1	0.2	-0.8
Mar-25	22,886.4	-0.2	-0.4	0.9	0.2
Apr-25	22,720.5	0.2	-0.1	0.4	-0.1

Note: Changes in real or inflation-adjusted Plastics Demand Estimate are based on 2008 dollars; specifically, the Producer Price Index for plastics product manufacturing 2002=100.

*"Plastics demand has remained steady, based on both month-over-month and year-over-year growth," said Dr. Perc Presda, Chief Economist at PLASTICS. "While concerns about the inflationary impact of tariffs are valid, the data so far do not point to effects that would raise significant concern for the plastics industry."

© 2025 Plastics Demand Estimate

Plastics Demand Estimate

Plastics Demand Estimate helps members understand overall trends in the plastics industry. The demand estimates for plastics products include monthly and year-over-year changes in dollar values, presented in both current and inflation-adjusted terms.

SCAN TO
DOWNLOAD



In addition to flagship reports, the Economics team publishes equipment analytics, trade statistics, jobs forecasts, and blog posts regularly. Key pieces this year included an analysis on the impact of Federal Reserve interest rate policy on housing, trends and forecast of plastics in essential healthcare, and the expansion of new tariffs. These provide actionable insights to navigate economic headwinds, guiding business strategies by analyzing how these forces may shape the industry over the coming months and years.

April 2025

Plastics Quarterly

A publication of PLASTICS providing a macroeconomic, plastics and markets, and plastics industry outlook

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The Perc Report

PLASTICS INDUSTRY ECONOMICS & MARKET INSIGHTS

The PLASTICS Economics and Industry Research Team produces research and policy analysis that informs industry decision-making and helps ensure members' perspectives are heard and considered by policymakers. Notable research and policy submissions during the year included:

White Paper

Beyond Zero or Infinity: Estimating Production-Maximizing Tariffs in the U.S. Plastics Industry (Pre-publication) – Estimated tariff thresholds that maximize domestic plastics production while minimizing economic costs.

Public Comments and Policy Analysis

Joint Review of USMCA – Provided member-driven recommendations on competitiveness, rules of origin, and environmental provisions.

Section 301 Excess Capacity of Major Trading Partners – Assessed the implications of global excess manufacturing capacity for the U.S. plastics industry.

World Customs Organization Harmonized System Nomenclature – Submitted comments on proposed product classification changes affecting plastics.

Section 301 Forced Labor Investigations – Analyzed trade and supply-chain implications of forced labor enforcement actions.

Reciprocal Managed Trade with China – Evaluated potential effects of proposed trade mechanisms on plastics supply chains and competitiveness.



Sustainability

The PLASTICS Sustainability team is dedicated to promoting and furthering the role of plastics in the circular economy. Through educating the public and fostering collaboration within the plastics industry, our sustainability group is a leading presence in the effort to raise recycling rates and eliminate plastic waste.



Zero Net Waste Recognition Program

PLASTICS' Zero Net Waste Recognition Program (ZNW) is designed to lay important groundwork for Zero Net Waste certification while greatly enhancing the public awareness of participating companies. To assist ZNW companies achieve their waste reduction and recycling goals, PLASTICS provides step-by-step guidance as well as practical strategies and tools that enable the continuation of such efforts and recognition status. Participating companies demonstrate leadership in landfill diversion, waste reduction, and most importantly a commitment to ensuring valuable resources go to the highest and best use.



PLASTICS Recycling Committee

The PLASTICS recycling committee celebrated its 10th anniversary in 2024. The tactical committee includes more than 170 members across all three of our PLASTICS councils, aligning efforts to put recycling at the forefront of their businesses. The PLASTICS Recycling Committee works to enhance the management of plastic waste through efforts such as advocating for increased collection, sortation, and recycling infrastructure, ensuring the definition of "recycling" includes advanced recycling, educating people within and outside of the plastics industry about plastics recycling and much more.



New End Market Opportunities

The NEMO program focuses on tackling the logistical and technical challenges for hard-to-recycle plastics. NEMO engages the full supply chain within the plastics industry, along with partnering trade associations and their respective members, academics, and other contributing experts. NEMO has enjoyed success with programs such as automobile bumper recovery and recycling, the use of plastic grocery bags in manufacturing asphalt, and pilot projects promoting circularity of polyethylene films. Projects are developed with PLASTICS members and then executed through recycling pilot programs, with the overall goal of material circularity. In 2026, the NEMO team has been focused on developing projects for polypropylene and film & flexibles.



PLASTICS INDUSTRY ASSOCIATION

RECYCLING OPEN HOUSE

Recycling Open House

PLASTICS hosted our annual Recycling Open House in August 2026. **10 organizations** participated and shared innovative ideas on designing for circularity, plastics and climate change, and industry-specific recycling initiatives. The Open House is a call to action for attendees, promoting collaboration across industry associations working towards sustainability goals. This year's event attracted over 400 registrants.



Since October of 2024, PLASTICS has been proud to present several awards for excellence in the area of sustainability innovation:

Leadership in Sustainability Innovation Award:
LyondellBasell Design: CTC Circularity Lab

Sustainability Innovation in Design Award:
Greiner Packaging Corporation: K3® r100 self-separating multi material package

Sustainability Innovation in Material Award:
Ecovaleric: e-P4HV biobased material

Sustainability Innovation in End-of Life-Award:
Plastics Ingenuity: Closed-Loop Recycling with Thermoformed Trays



Operation Clean Sweep

Operation Clean Sweep® (OCS) continues to build momentum across the plastics value chain, strengthening its role as a global program focused on preventing plastic resin loss and supporting continuous improvement in responsible resin handling.

With more than 6,000 members worldwide and active programs in more than 65 countries, OCS continues to demonstrate the global reach of the plastics industry's commitment to preventing resin loss. In the U.S., OCS now includes more than 135 member companies and more than 90 OCS Verified Facilities.

This year, OCS advanced several key priorities, including the introduction of a refreshed brand identity, the launch of online on-demand OCS Verifier Training, and the release of targeted resources to support members in working towards the goal of zero resin loss.

A Refreshed Brand Identity

Introduced during OCS CON 2025, the new brand reinforces OCS's leadership in responsible resin handling and reflects its evolution as a global movement dedicated to continuous improvement and measurable environmental outcomes.



Program Highlights

Achieved 6,000+ members globally

20% global membership increase from prior year
Demonstrated program rigor at scale with the close of the inaugural 2023-2025 U.S. facility verification cycle

Resulting in 90+ OCS Verified Facilities in the U.S.

Program Updates

Launch of online on-demand OCS Verifier Training

Release of targeted resources to support resin loss prevention, including:

Guide to Railcar Washing

Supply Chain Engagement Webinar

OCS 20 CON 25

Indianapolis, IN

130+
attendees

35+ speakers
across **21+ sessions**

2 facility tours
at Primex Plastics and Berry Global

Waterway Cleanup in partnership with
Friends of the White River

IndyCar Factory Tour at the Dallara
Experience Hub and Indianapolis Motor
Speedway Museum Experience



International Partner Updates

Eight International
OCS Programs have
data reporting in
place

Seven International
OCS programs
have verification
programs in place

More than 300 external
inspections conducted
across International OCS
Programs in 2025



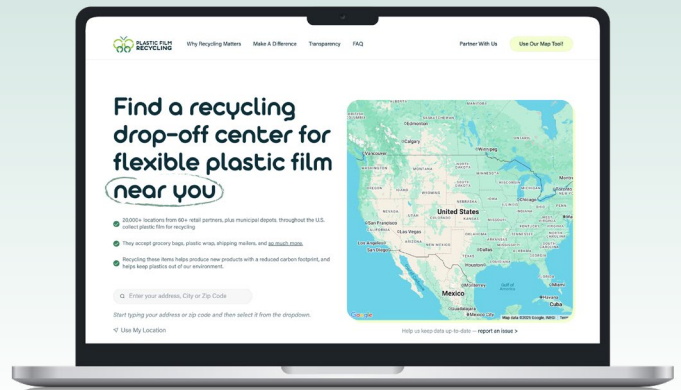
FLEXIBLE FILM RECYCLING ALLIANCE

The Flexible Film Recycling Alliance (FFRA) continues to advance a coordinated, data-driven approach to expanding flexible film recycling. Through targeted pilots, strategic partnerships, and enhanced tools, FFRA is addressing key barriers to collection, verification, and participation across the value chain.

Advancing a Third-Party Retail Validation Framework

FFRA is making significant progress in developing a voluntary third-party validation framework and industry standard designed to increase transparency and strengthen confidence in film collection and recycling. The program will address challenges related to unverified collection volumes and inconsistent documentation across retail collection systems.

Pilot trials with select retailers, including Publix and Target, have begun with a focus on improving data integrity, establishing consistent proof points, and building assurance across the recycling value chain.



250k+

Unique Users to
Date

28K+

Retail Locations in all 50
states, and Washington, DC
and Puerto Rico

70+

Participating
Retailers



Launching B2B Film Collection Pilots in California

FFRA was awarded funding to launch a B2B film collection pilot in California to capture high-quality commercial film and demonstrate scalable collection models. This pilot is funded by Circular Action Alliance (CAA) as part of limited testing to inform program planning.

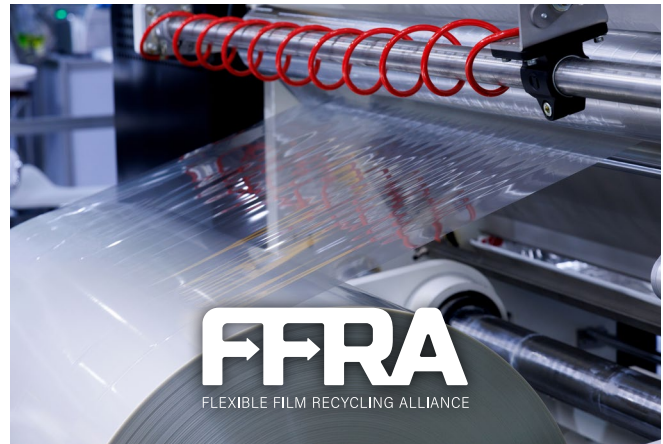
The pilot includes projects in Sacramento and Ontario, designed to service logistics, retail, and manufacturing businesses. Collection is being executed in partnership with Shorr Packaging in Ontario and 1-800-GOT-JUNK? in Sacramento, leveraging existing logistics capabilities to support efficient material recovery.

By focusing on clean, concentrated film streams from commercial generators, the pilot intends to validate new pathways for expanding film recycling beyond traditional retail drop-off programs.

Activating Consumer Education Campaigns

Building on consumer research conducted by the ERM Shelton, FFRA, in collaboration with the Flexible Packaging Association, will begin implementing a targeted education campaign in Minnesota to increase participation in film recycling and reduce contamination in retail drop-off streams.

The campaign will apply research-driven messaging to improve clarity around what qualifies as recyclable film and how to recycle it correctly.



Strengthening Industry Alignment Through the Peer Collaborative

FFRA continued to convene stakeholders through its Peer Collaborative, a platform for pre-competitive alignment across the flexible film value chain, and in January convened members in Portland, Oregon, for hands-on learning, strategic alignment, and forward planning.

In addition to a working session to align on FFRA's 2026 priorities, attendees toured a CAA sorting center, and a Recycle On depot to serve film collection and processing under EPR systems, providing valuable insight into how these systems operate in practice across the value chain.

Expanding and Enhancing the Plastic Film Recycling Directory

FFRA continued to enhance the Plastic Film Recycling Directory as a core tool to improve access, transparency, and consumer confidence in film recycling.



FUTURE LEADERS IN PLASTICS

Future Leaders in Plastics (FLiP), the premier professional development network for employees under 40 at member companies, continues to grow and deliver meaningful impact across the industry.

Committee Direction and Momentum

This year, FLiP finalized new Operating Guidelines, reaffirming a foundation that supports inclusion and sustains growth across FLiP leadership and activities. FLiP continues to expand its network, now at over 350 members, as it meets opportunities for collaboration with SPE in the early stages of integration and beyond.

Professional Development Opportunities

FLiP continues to offer high-value opportunities in networking, leadership, and professional development. The FLiP Mentorship Program set another record for participation, with over 30 active mentor-mentee pairings across two programs, including a new partnership with Dear Women in STEM. With FLiP's continued book clubs, quarterly guest speakers, and in-person networking events, there have never been more opportunities for young professionals to engage with the largest network of future leaders the industry has ever seen.

Environmental and Community Impact

FLiP's annual litter cleanup continues to be a cornerstone of its commitment to environmental stewardship and community engagement. The 2026 cleanup—held in conjunction with the National Plastics Conference—will mark the program's fifth year. Volunteers collect mismanaged materials throughout the host city, reinforcing FLiP's mission to give back and make a positive impact where the plastics industry operates. The event continues to receive exceptional sponsor support, which helps make the effort possible year after year.

Looking Ahead

FLiP remains committed to expanding access to meaningful learning, leadership, networking, and impact-driven experiences, as it shifts its attention towards its presence at NPE2027, which will include the FLiP & Sip Reception, a volunteer project in partnership with U.S. Hunger, and the NPE Student Program.



2025 Cleanup Champions Initiative Highlights

9

COMPANIES

40+

LITTER CLEANUPS



1,912

HOURS VOLUNTEERED



1,623

VOLUNTEERS



7,955

LBS OF TRASH
COLLECTED



275

LBS OF RECYCLING
COLLECTED*



Through the leadership of the Future Leaders in Plastics (FLiP) Community Impact Task Group, the Cleanup Champions Initiative encourages PLASTICS member companies to utilize the Guide to Planning a Litter Cleanup to organize cleanups in their local communities. In 2025, nine companies held over 40 cleanups across the country as a part of the program.



FUTURE LEADERS
IN PLASTICS

FLiP MEMBERS OF THE YEAR



**STEPHEN
GOFF**

PROCESS ENGINEER
POLYQUEST



**STEPHEN
SCOPELITIS**

DIRECTOR OF SALES
SHAWNEE CHEMICAL
COMPANY

CORE VALUES

Since its adoption in 2024, the PLASTICS team continues to integrate core values into the day to day work and approach of the Association. In 2025, **core values** were integrated into the performance review process. Additionally, the first **Core Value Awards**, a peer-nominated award, were introduced to highlight and celebrate team members who represent the core values every day.



2026 Core Value Award Winners

Impact



Katie Koehling

Director, Industry Engagement
(Material Suppliers)

Unity



Michelle Koblenz

Director, Event Operations

Ethics



Whitney Taveras

Senior Director, Industry
Engagement (Equipment)

Optimism



Monica High

Senior Office Manager

Innovation



Luiza Carson

Director, Creative Services

Team Winner:



OCS Team



NEW FACES



Daniel Haas
Intern, Economics



Reed Westcott
Director, Federal Government Affairs



Eve Vitale
Executive Director, Foundation



Amanda Carter
Office Assistant



Jody Allen
Senior Manager, Industry Standards



Kimberly Wakuluk
Manager, Member Services



Grayson Hepp
Intern, Economics



Chris Barry
Senior Manager, Marketing Communications
& Technology



Deborah Walston
Manager, Information Systems



Devonta Williams
Manager, Development Operations



Pat Farrey
Executive Vice President and Chief Integration Officer



Desiray Young
Manager, Sales & Advertising



Shira Rawlinson
Vice President, Communications



Ryan Foster
Senior Manager, Marketing Programs



Deborah Zaengle
Manager, Accounting & Office



Elizabeth Malone
Senior Manager, Trade Show Logistics (NPE)



Scott Marko
Manager, Meetings & Events



Heather Wilson
Senior Manager, Content Programming



Pedro Matos
Manager, Web Technologies



DEPARTURES

10/14/2026	HOUSTON	OCS CON 2026	OCSSCON.ORG
11/11/2026	ATLANTA	PLASTIC SUSTAINABILITY EXECUTIVE FORUM	PLASTICSEF.ORG
12/8/2026	CHARLOTTE	VINYL WEEK 2026	VINYLWEEK.ORG
3/8/2027	WASHINGTON, D.C.	FLEXFORUM	FLEX-FORUM.ORG
3/8/2027	WASHINGTON, D.C.	SPRING MEETING & FLY-IN	PLASTICSINDUSTRY.ORG/FLYIN
5/3/2027	ORLANDO	NPE2027	NPE.ORG
10/4/2027	NASHVILLE	OCS CON 2027	OCSSCON.ORG



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