



# 2025 IMPACT REPORT



FLEXIBLE FILM RECYCLING ALLIANCE

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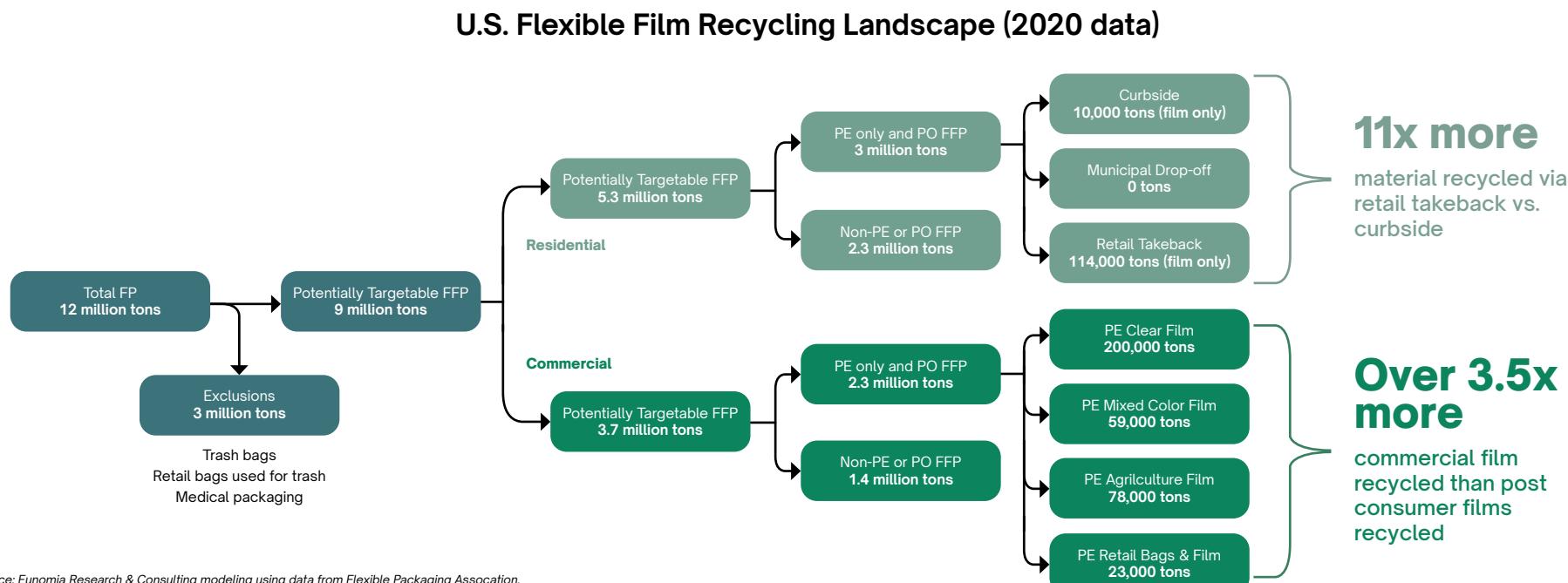
# Executive Summary

Flexible films and packaging are essential to modern life—they enable safe food delivery, sterile medical care, and efficient product protection. Their lightweight design reduces material use and energy consumption, making them one of the most widely used packaging formats in the U.S.

Today, an estimated **5.3 million tons** of flexible films and packaging in the U.S. could be recycled using existing technologies and systems, yet only **0.5 million tons** currently are.

Launched in 2024, the Flexible Film Recycling Alliance (FFRA) is working to increase that number. Working collaboratively across the value chain, FFRA is accelerating recycling rates, expanding access, and improving education to expand and scale film recycling into a truly circular solution.

This **Impact Report** marks our first annual assessment of progress toward that goal. As we refine metrics and develop new solutions in the years ahead, we will continue to share the story of how the U.S. is scaling up flexible film recycling—together.



Source: Eunomia Research & Consulting modeling using data from Flexible Packaging Association, Stina Inc., The Recycling Partnership, U.S. Plastics Pact, and expert interviews (2019/2020 data).

## FFRA Membership Across the Value Chain



## Purpose

Represent the end-to-end flexible plastic film value chain, serving as the central forum to promote and improve the flexible film recycling ecosystem.



## 2025 HIGHLIGHTS

# Plastic Film Recycling Directory

In January 2025, FFRA introduced the [Plastic Film Recycling Directory](#) to empower consumers with clear guidance on how, what, and where they can recycle, while expanding access to drop-off locations nationwide. This easy-to-use digital tool now features more than 20,000 locations from 60+ retail partners, covering all 50 states and Puerto Rico. Based off of fully organic and word-of-mouth marketing, the platform has averaged 18,000 monthly unique visitors and surpassed 170,000 unique users—underscoring its role as a trusted resource for advancing film recycling and building a more circular system.

We were also excited to see strong consumer knowledge: users who completed the site's recycling quiz answered 75% of questions correctly, indicating that consumers are aware and eager to support film recycling best practices.

That eagerness is reflected in the many inquiries we receive about what is and isn't recyclable. Based on frequently asked questions, we are developing additional educational resources to ensure consumers have the tools they need to recycle correctly.

At the same time, we continue to expand the directory by adding more retailers as we learn about their film recycling programs, as well as municipal depots and alternative collection systems such as Ridwell and Hefty ReNew™. These efforts aim to support informed participation and drive growth in film recycling nationwide. In 2025, the Sustainable Packaging Coalition completed their first ever validation effort to verify location placement is accurate from what retailers say, they have shared these insights and 2026 will add a verified button to locations that we know have been verified by their process and our validation process going forward.



**PLASTIC FILM  
RECYCLING**

## 2025 Directory Analytics



170k+  
users

20k+

drop-off locations from



60+  
retailers



59-second

average engagement time



**Top States Where  
Users Visited From**

California  
New York  
Virginia  
Texas  
Washington



**Top Referring  
Sites**

How2Recycle  
Direct traffic  
Organic Google search  
Nature Valley  
HelloFresh

# 2025 HIGHLIGHTS

## Peer Collaborative Working Group

To scale film recycling, it's imperative that we coordinate, share resources, and align best practices. With nearly a dozen U.S. trade groups and nonprofits actively investing in film recycling initiatives, FFRA launched the Peer Collaborative in 2025 to explore how each group's independent efforts can better support the shared goal of increasing flexible film and packaging recycling. Each organization brings unique strengths—and sometimes different strategies—but through open dialogue we're finding ways to collaborate and leverage insights to accelerate progress.

Flexible Films Initiatives: Organizational Landscape*						
Consumer Education & Awareness	Industry Education & Design	Collection	Reprocessing	Market Development	Advocacy	
<b>Flexible Film Recycling Alliance</b>						
FFRA	Design Guides	Test protocols to determine technical recyclability	Report: Economics of Pyrolysis for Films			
APR						
greenblue	How2Recycle					National Access Study for Films via Drop Off Only
Circular Great Lakes	Pending: Audit Program for Retail Drop Off					Regional State Advocacy
US PLASTICS PACT	Retail Pilot	Secondary Sort		Postconsumer Recycled Content Commitments and Tracking		Journey to Film & Flex Circularit: Roadmap of Necessary Design, Collection, and End Market Levers
FPA	Design Guides, Goals and Education					Federal & State Advocacy
ALLIANCE TO END PLASTIC WASTE	Value of Flexibles Messaging		3 City Pilots	Pyrolysis Mexico		
THE RECYCLING PARTNERSHIP	Access and Recycling Education		Grants for flexible film collection, sortation and reprocessing			Federal & State Advocacy
American Chemistry Council			Consortium facilitation and support to advance the development of plastics feedstock networks and end markets			
CLOSED LOOP partners			Financing for flexible film collection, sortation and reprocessing			

\*Circular Action Alliance is not included as they had not been officially launched when this chart was developed, but they are engaged with the Peer Collaborative. They will be included in future iterations of this chart.

## Peer Collaborative Workstreams

The Peer Collaborative is organized into three workstreams focused on developing concrete strategies and shared resources. Subgroups meet regularly and the full Collaborative meets quarterly to review progress and align next steps.

### California Strategy

#### Objective:

- To develop a strategy to help increase and recognize existing flexible film recycling within the context of California legislation (material categorization study, access and recycling rates, labeling, etc.)

#### Working Group Co-leaders:

- American Chemistry Council, The Recycling Partnership

### Broad Policy Strategy

#### Objectives:

- To provide data, proactive strategies, and possible model bill language to support flexible film recycling within existing or proposed legislation
- To support the Circular Action Alliance with film recycling needs and funding where possible — this may be national, focused on states that have implemented extended producer responsibility (EPR) legislation, and/or regional

#### Working Group Leader:

- Flexible Packaging Association

### End Markets Mapping

#### Objectives:

- To create one harmonized end markets map for flexible films, to be used by all stakeholders that can be leveraged for financing and legislative purposes.
- Following map creation, to develop a strategy for moving flexible materials to highest use, lowest environmental impact

#### Working Group Leader:

- FFRA

# Verification (*in progress*)

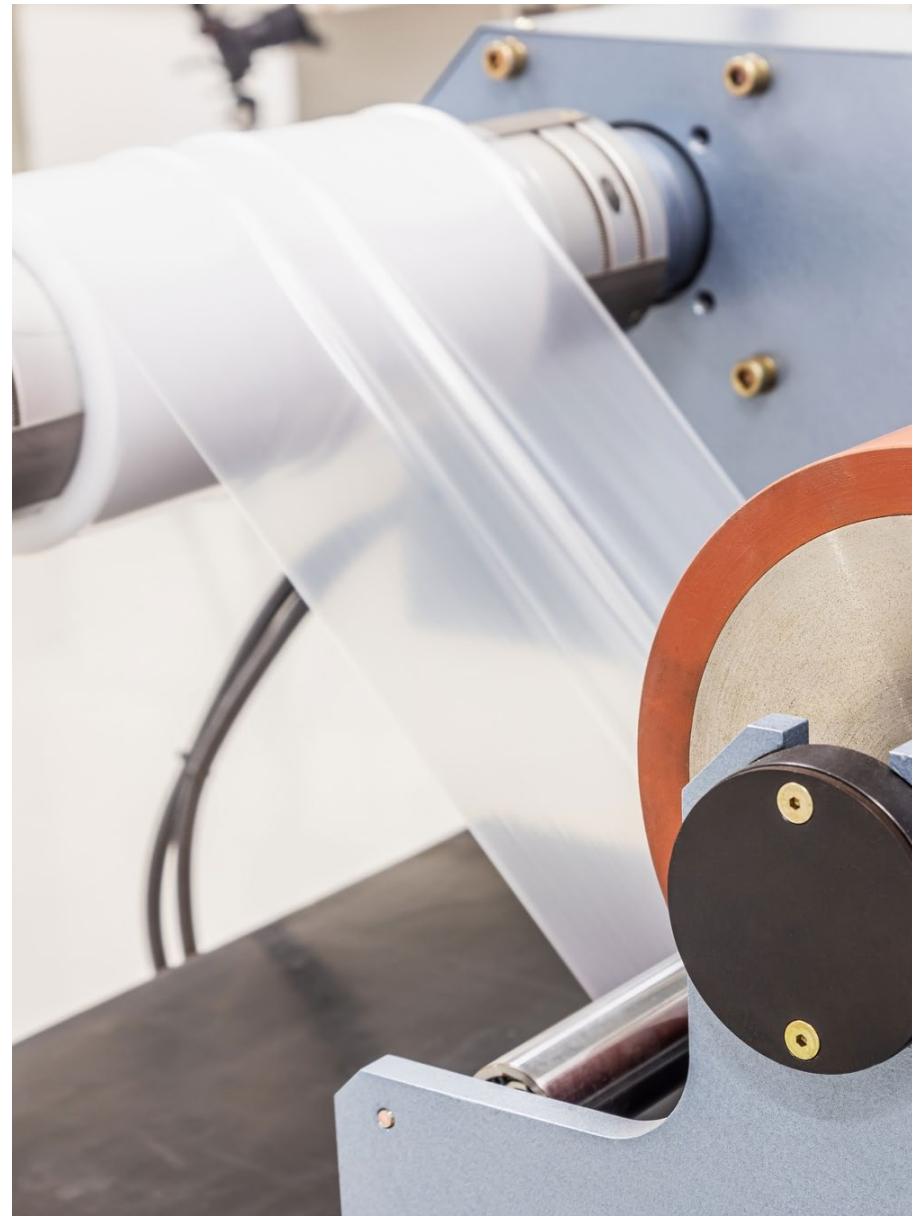
Building trust and transparency is central to FFRA's work—and third-party verification is a key tenet of our approach to advancing flexible film recycling. In 2025, FFRA prioritized the development of a robust verification standard to ensure that every step of the recycling process is credible, traceable, and accountable.

**This initiative is designed to:**

- **Confirm accuracy** of reported film collection location reported volumes of film and film packaging consumers drop off in these locations—helping to differentiate between front of the house and back of the house volumes
- **Understand depot practices** in regard to film recycling (i.e. what percentage is sent to bale versus landfilled; how clean are drop-off bins; etc.)
- **Confirm collected materials** are sent to recycling to be processed into new, credible products
- **Offer direction** on contamination monitoring, consistent reporting mechanisms, options for taking corrective actions, and chain-of-custody integrity

To support this process, we have developed an advisory board made up of industry stakeholders from across the value chain. This board will provide critical insights into current practices, identify pain points, inform data flows, and help refine the overall program design.

By the second quarter of 2026, we plan to launch pilot testing to assess our standard and adjust program details as needed. In parallel, we will develop auditor training resources to ensure that any qualified auditing firm can reliably apply the standard at customer locations. Our goal is to have all these steps—final guidance, audit structure, advisory input, pilot testing, and auditor training—fully implemented by mid- to late 2026.





# Consumer Campaign to Recycle More Film

While it has long been recognized that consumers are confused about flexible films—what they are, whether they’re recyclable, and how to recycle them—it has been challenging to understand the true extent of this education gap. To address this, FFRA and the Flexible Packaging Association (FPA) commissioned ERM Shelton to conduct both an ethnographic study – following consumers for a week to observe their behavior – and a quantitative survey to gauge perceptions of flexible film recycling.

The findings were striking: **only 6% of consumers can accurately identify flexible films**, and many mistakenly believe these materials can be recycled curbside.

By investing in this research, FFRA gained actionable insights that are now guiding the development of a targeted education campaign for 2026 that we believe will significantly increase the current 2% film recycling rate.

## Proposed 2026 Campaign

### Objectives:

- Clarify industry terminology
- Educate with purpose
- Connect recycling to consumers’ core values
- Improve in-store drop-off access

Research shows that personal responsibility and environmental concern are strong motivators – but only when recycling is simple, visible, and consistent.

### Funding:

FFRA and FPA have committed some funding, but we are still seeking additional partners to get the most impact out of this campaign. If you or an organization you know is interested, please contact [Kurt Kurzawa](#), who heads FFRA, by Jan. 31, 2026. Funders will join a steering committee to help guide and refine the campaign.



# Advocacy

In 2025, FFRA prioritized advocacy efforts in California, recognizing it as the most significant policy environment for flexible film recycling. Our goal was to ensure that alternative collection systems (ACS)—such as Store Drop-off—would be recognized in state recycling regulations.

To achieve this, FFRA conducted over 78 one-on-one meetings with more than 20 key California stakeholders and actively participated in two SB 54 public comment processes. With strong support from the Peer Collaborative, these efforts led to a major policy shift: **the final SB 54 regulations now include alternative collection methods as a collection modality.** This change directly supports the expansion of flexible film recycling options and validates the impact of FFRA's advocacy.

Looking ahead to 2026, FFRA will continue to focus on California in order to better align SB 54 and SB 343 legislation. We are also launching initiatives to demonstrate statewide growth in film recycling and to highlight the value of flexible films, especially as the risk of regulatory bans increases.

# Research and Development

In 2025, FFRA, in partnership with Plastic Industry Association's New End Market Opportunities (NEMO) project, advanced the understanding of post-consumer polyethylene (PE) film recycling by funding and conducting multiple research projects. These studies provided actionable insights into material quality, contamination rates, and end market opportunities across various collection methods—including Store Drop-off, material recovery facilities (MRFs), and subscription services.

The findings are directly informing strategies to reduce contamination, improve collection infrastructure, and expand recycled content in circular markets.

## Bale Audit Results

### Store Drop-off / Retail Film Collection (Mono-Layer)

- Two bales evaluated from California and Indiana
- Under 3% contamination
- 35lbs of shopping bags (~2,300 shopping bags) found in Indiana bale

### MRF / Curbside Collection (Mono-Layer)

- Two bales evaluated from U.S. and Canada
- U.S. bale had <50% LLDPE film content and material not suitable for mechanical or advanced recycling technologies
- Canadian bale had 85% LLDPE film content and material stream was suitable for both mechanical and advanced recycling technologies

### Subscription Service Collection (Mono-Layer)

- One film bale evaluated from Ridwell, which consumers can pay a monthly subscription fee to have their hard-to-recycle materials picked up
- <2% contamination
- 100% true post-consumer film

## Northwestern University Study Results

20-week study to analyze the potential impacts of a flexible packaging ban in California

### Findings

- Significant estimated CO2 emission increase
- Increased financial burden on consumers
- Major financial impacts on food spoilage and safety issues

10-week fellowship study to identify cost effective and impactful opportunities to increase U.S. film recycling rates by 2030.

### Recommendations

- Bolster consumer film drop-off with clear signage, consistent terminology, and active consumer education
- Leverage existing grocery delivery services to collect household film during grocery drop-off
- Assist small businesses that generate film for new recovery

# Research and Development

## Identify Best Practices

**Objective:** To ensure smart investment, we need to start with shared knowledge. Although much research has already been done, it is either not disseminated or assessed for broad insight, and through the Peer Collaborative and our work with Northwestern University, we are working to identify best practices and lessons learned. Any new project is evaluated against this summary of insights before resources are committed.

### 2025 Actions

- ✓ Developed best practices on depot collection and international assessment by Northwestern University.
- ✓ Began development of a research clearing house and continued to lead staffing and investment into Peer Collaborative while also developing relationships with European and Canadian counterparts.

## Establish a Baseline

### Objective

To measure success, we need to understand where we started. Evaluating contamination rates and volumes collected via different formats is essential to evaluating our impact. Much of this data is currently unavailable, so we are working to establish systems with our peers to share and disseminate.

### 2025 Actions

- ✓ Completed three bale audits looking at different forms of collection to understand the role collection (Store Drop-off, subscription, and curbside/MRF) plays in contamination rates.

## Implement Based on Insights

### Objective

To put pilot programs into action that will test what we have learned.

### 2025 Actions

- ✓ Launched several pilots toward the end of 2025, which will support understanding contamination and consumer engagement on film recycling.
- ✓ Engaged with Northwestern University to assess the impact of SB 54 on California film recycling and identified significant strategies and infrastructure needs to meet state goals.



# Going Forward into 2026

## Initiatives

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1

Implement a third-party verification program

2

Expand and enhance the Plastic Film Recycling Directory

3

Begin demonstrating validity of Alternative Collection Systems (ACS)

4

Increase consumer participation in film recycling

5

Develop and expand various film collection models

In 2026, FFRA has five key initiatives that serve as a strategic roadmap to continue to strengthen the circular economy for flexible plastic films. Each of the five priorities reflects a targeted effort to build credibility, expand access, and drive real-world recycling outcomes.

**Implementing a third-party verification program** reinforces trust and transparency in the film recycling ecosystem, ensuring that participating sites and systems meet clear, measurable standards. **Enhancing the Plastic Film Recycling Directory** further supports this work by improving the accuracy and visibility of recycling drop-off locations nationwide, helping consumers and retailers navigate a rapidly evolving landscape with confidence by capturing all modalities of film collection.

The roadmap also emphasizes FFRA's leadership in driving innovation and broadening participation across the value chain. **Demonstrating the role and value of ACS positions** FFRA as a key voice in shaping solutions aligned with state and national regulatory frameworks. **Increasing consumer participation in film recycling** by leveraging research, paired with **expanding film collection models**, like Store drop-off, B2B collection, and emerging pilots, ensures that more film is captured, processed, and reintegrated into new products.

Together, these initiatives chart a clear, measurable, and collaborative path toward scaling film circularity and delivering lasting impact for industry, policymakers, and communities.

# Membership in FFRA

As FFRA continues accelerating progress toward a more circular future for flexible film, broad industry collaboration remains essential to sustaining and scaling this momentum. **We invite brands, retailers, recyclers, equipment suppliers, and value chain partners to join** and be part of a solutions-driven coalition strengthening film recycling nationwide.

FFRA membership provides access to third-party verified data and performance insights that help organizations enhance credibility and support internal environmental, social, and governance (ESG) initiatives and reporting objectives. Members also gain a direct voice in shaping policy and regulatory strategy, including active engagement on SB 54, SB 343, and emerging state EPR frameworks. In addition, members can participate in FFRA's pilot programs and innovative collection models; from Store Drop-off and B2B collection to ACS and next-generation recovery solutions.

Membership also delivers industry leadership visibility through FFRA's national platform, including participation in and access to insights from the Plastic Film Recycling Directory, the most comprehensive listing of film drop-off locations in the U.S. Together, we can strengthen recycling infrastructure, improve transparency, build consumer trust, and ensure flexible film remains a viable and scalable component of the U.S. recycling system.



**Interested in discussing FFRA membership?**

**Contact:**  
**Kurt Kurzawa**  
[kkurzawa@ffra.org](mailto:kkurzawa@ffra.org)  
202.974.5264

**Find out more about FFRA** 

## Member Benefits



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Collaboration



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Engagement



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Published January 2026

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