



CalFFlex

An Initiative of The Film
& Flexibles Recycling Coalition



**The Recycling
Partnership**
Solving for Circularity

Who We Are ♦

Our mission is to build a better U.S. recycling system.

The Recycling Partnership is a purpose-driven NGO.

We are a team of experts, practitioners, and thought leaders with the real-world experience needed to overhaul the U.S. recycling system through on the ground action.



Together, We're Building a Better Recycling System



What must be true for the U.S. recycling system to really work?



1

Design for Recycling: All packaging needs to be designed for recyclability.

2

Ability to Recycle: All households need access to recycling in their home.

3

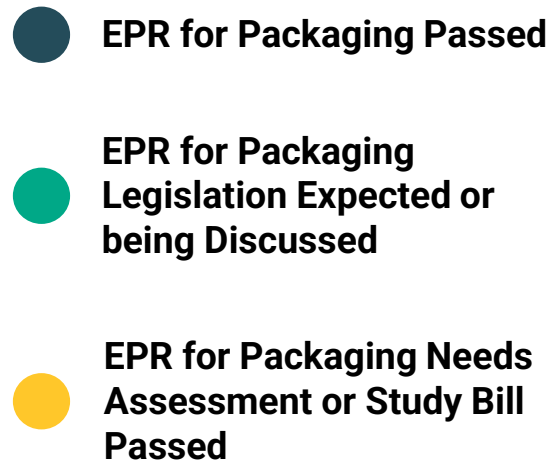
Public Participation: Residents need to fully engage in recycling.

4

Recycling Infrastructure: Recycling facilities need to effectively process the material.

5

Old Stuff → New Stuff: Recycling facilities need sufficient end markets.



The Film & Flexibles Recycling Coalition





National Picture: Film and Flexibles Packaging

A Growing Packaging Stream with Limited Recycling Options

1

Film and flexible packaging (FFP) makes up **34% of the total U.S. plastic packaging industry**.

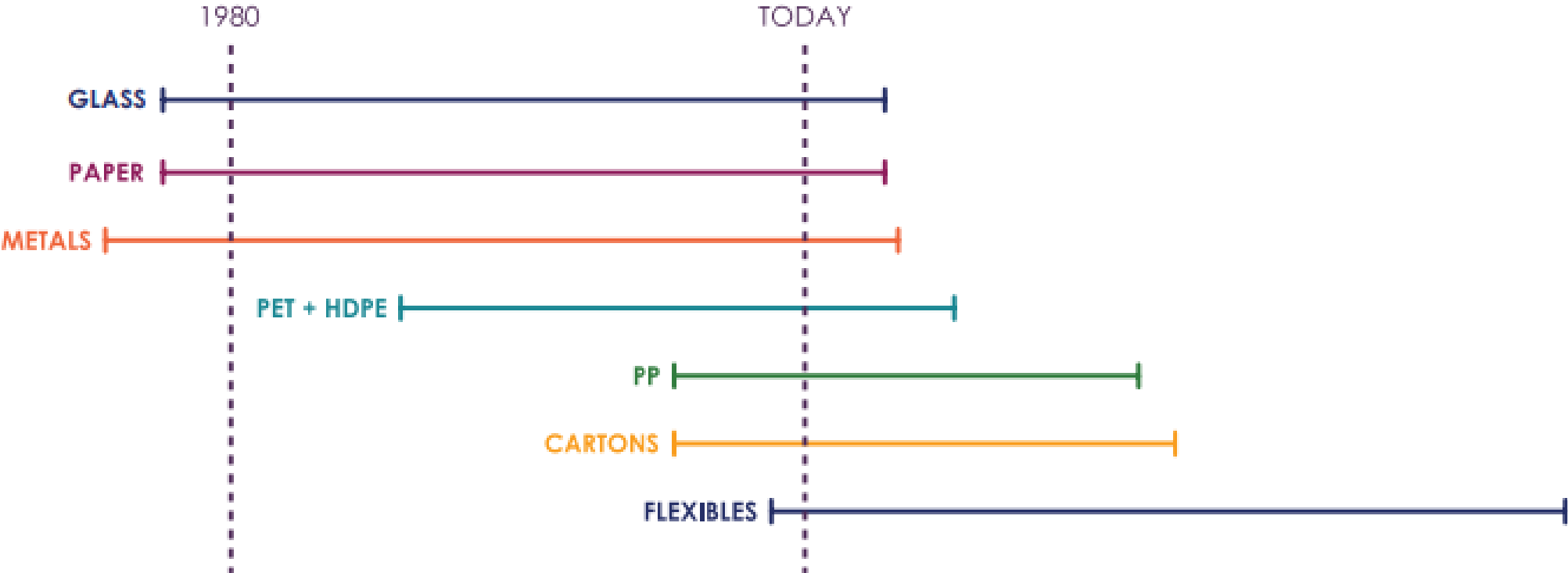
2

Only 2% of U.S. households can recycle film and flexibles in their residential program, and even less makes it out of the MRF and to end markets.






3

Few MRFs accept film and flexibles because of capture challenges, upside down economics, and limited end markets.

Investment in Recycling Infrastructure Over Time



The Recycling Partnership has delivered almost \$14MM in grants and studies addressing FFP

	Type	# of Grants / Studies	Strategic Aim
	Capture Study	10	<ul style="list-style-type: none">Understand current household generation and current capture rates
	Curbside Infrastructure / Opt-In	2	<ul style="list-style-type: none">Ensure access to recycle curbside is “turned on” as end markets start to pull material and MRF capabilities growPilot curbside opt-in for flex packaging
	Education and Outreach	4	<ul style="list-style-type: none">Projects to promote flex packaging recycling behavior
	Collection Program	6	<ul style="list-style-type: none">Provide drop-off for residentially generated flex packaging
	MRF	10	<ul style="list-style-type: none">Provide holistic value proposition to MRFs to encourage material sortation and captureRapidly prototype equipment and ops tactics in MRFs to improve capture and quality, publishing best practices.Leverage learnings to deploy long term equipment grants to scale processing where end markets can pull material
	Secondary Processor	8	<ul style="list-style-type: none">Increase processing capabilities and capacity to create bales to meet end market specifications
	Reclaimer	3	<ul style="list-style-type: none">Support residential bale quality improvements and hone understanding of processing economics to meet bale specifications for end market readinessIncrease reprocessor capabilities and capacity to create higher quality outputTest all avenues for processing post-residential material (i.e. mechanical and chemical end markets)
	End Market Product	4	<ul style="list-style-type: none">Increase end market capacity to accept more residentially generated and reprocessed material for use in new products.Test various end market support mechanisms (i.e. subsidies, F&F feedstock application in novel uses)
 The Re Partner Solving fo	TOTAL	47	<i>*includes projects managed by The Recycling Partnership, some of which operated outside of the Film and Flexibles Coalition but all tie back and amplify one another</i>



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**The Recycling
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Building a Better Recycling System

Aggressive Mandated Targets Must be Met to Continue Using Covered Materials

What Does It Mean for Producers?

- **An Existential Risk:** Covered materials sold, offered for sale, imported or distributed in CA must meet targets.
- **Strong State Enforcement:** Civil penalties of up to **\$18MM/year/package**, with potential for bans or direct regulation.

What Does is Mean for Manufacturers?

- **Changes in Product Design:** Producers may require design changes to meet recyclability requirements.
- **Risk of Certain Formats:** If unable to comply, format shifts may occur.

Mandated Targets Require



100% Recyclable or Compostable by 2032



Recycling Rate Targets

- 30% by 2028; 65% by 2032



Responsible End Markets (REMs)

- Feedstock shipped from REM to manufacturer counts for recycling rate

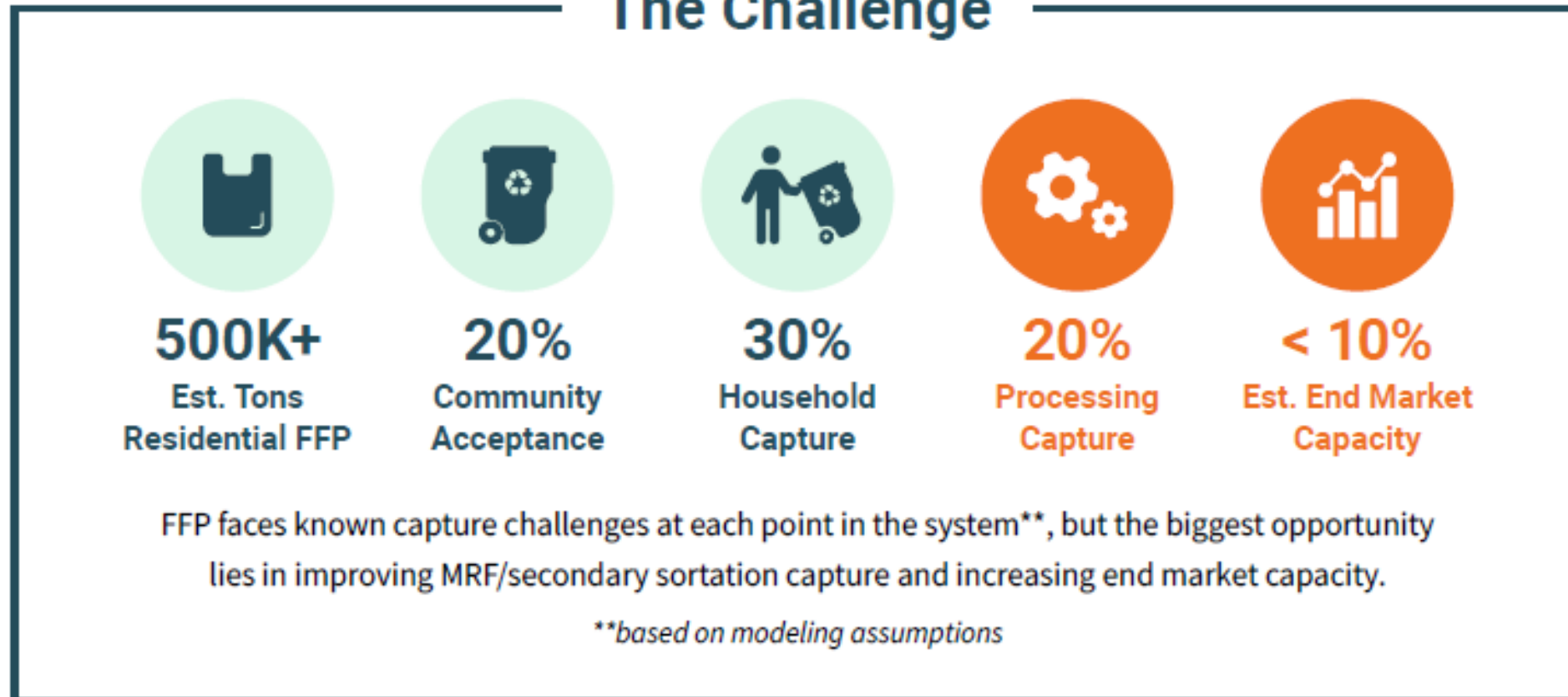


Source Reduction Targets

- 10% by 2027; 25% by 2032

Initial state-defined FFP categories are not considered recyclable due to lack of curbside access and effective MRF sortation.

The Challenge



Estimated that 0.5% of all FFP currently makes it through California MRFs



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Objective: Demonstrate scalable pathways for film and flexible packaging to achieve trending toward compliance with SB54 while working closely with key leaders.



**The Recycling
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Building a Better Recycling System

1

Leverages half a decade of experience and over 50 FFP project learnings.

2

On the ground projects happening now in California.

3

Consistent coordination with influential California leaders.

By April 2026, CalFFlex Will Prove Processing Capture, Support End Markets, and Inform the Plan in California

1



**Map
Two Possible
Solutions**

(MRF, Secondary
Processing Capture)

2



**Support Potential
Responsible
End Markets
& Stimulate Demand**

3



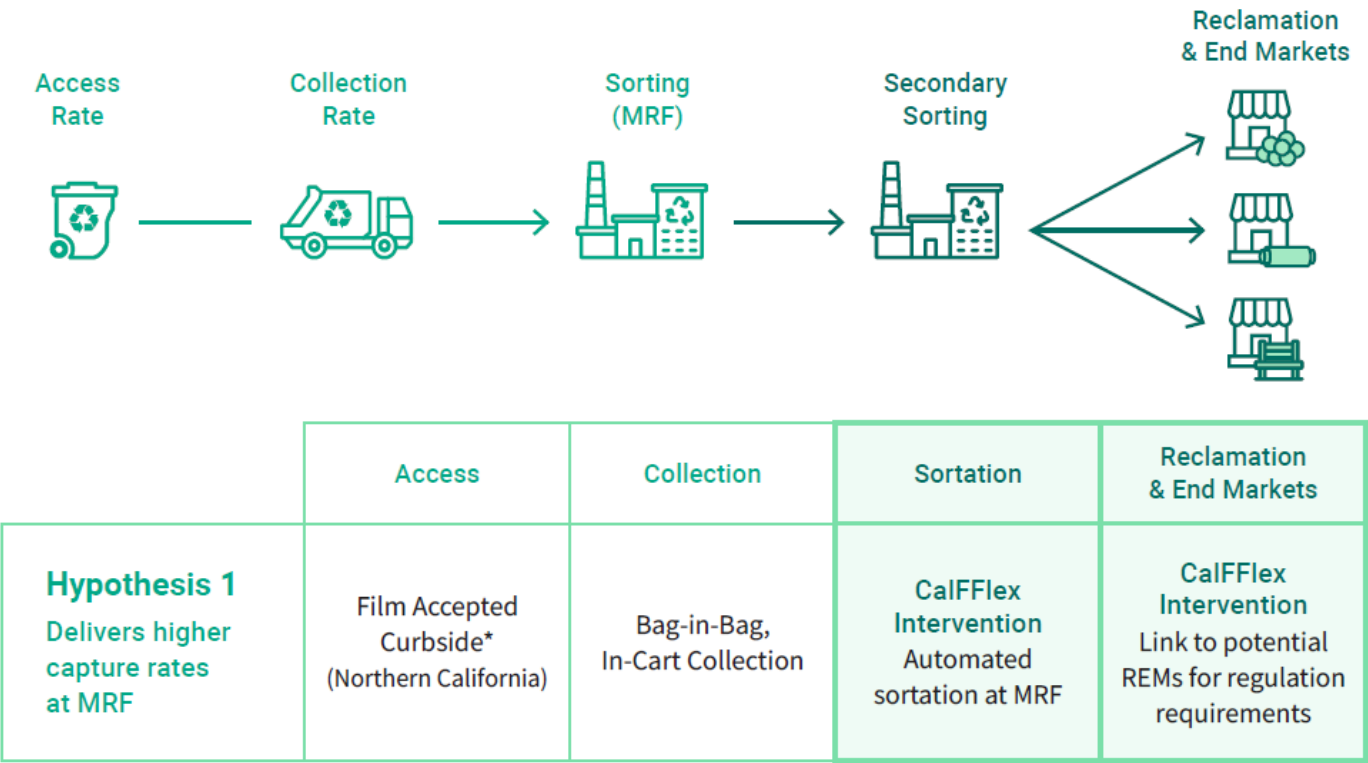
**Deliver Blueprint to
Inform Producer
Responsibility
Organization**

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Hypothesis 1



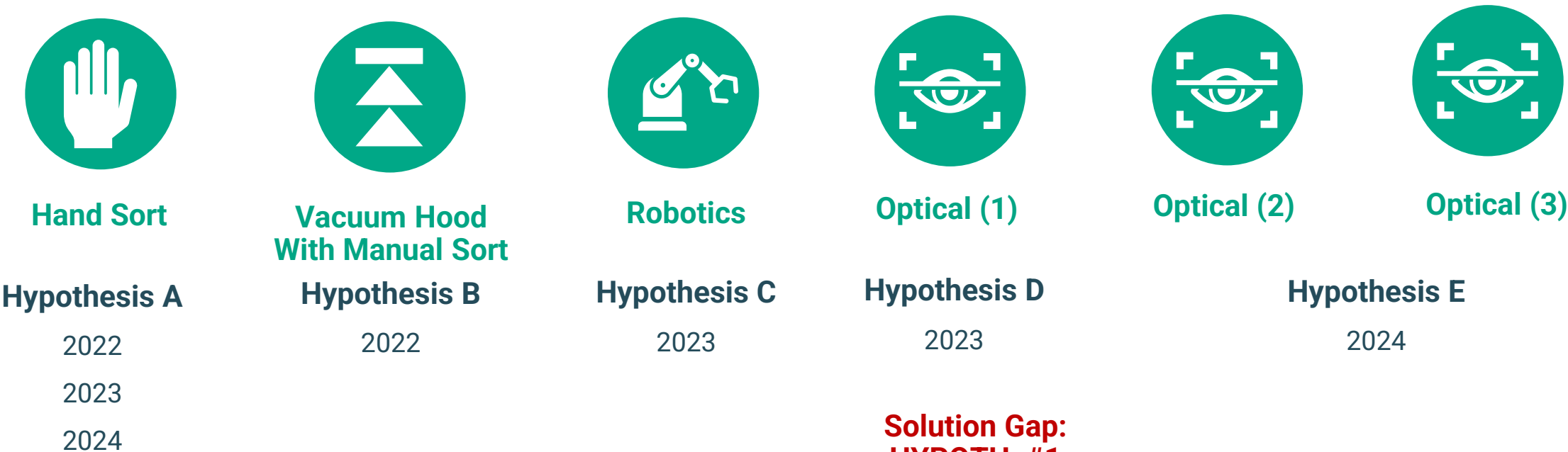
* Working in communities where film collection is already turned on

In the future, CalFFlex will also need to:

- Blueprint one to two resident education programs
- Prove out more than one solution to meet regionally diverse needs, including separate curbside collection and depot.

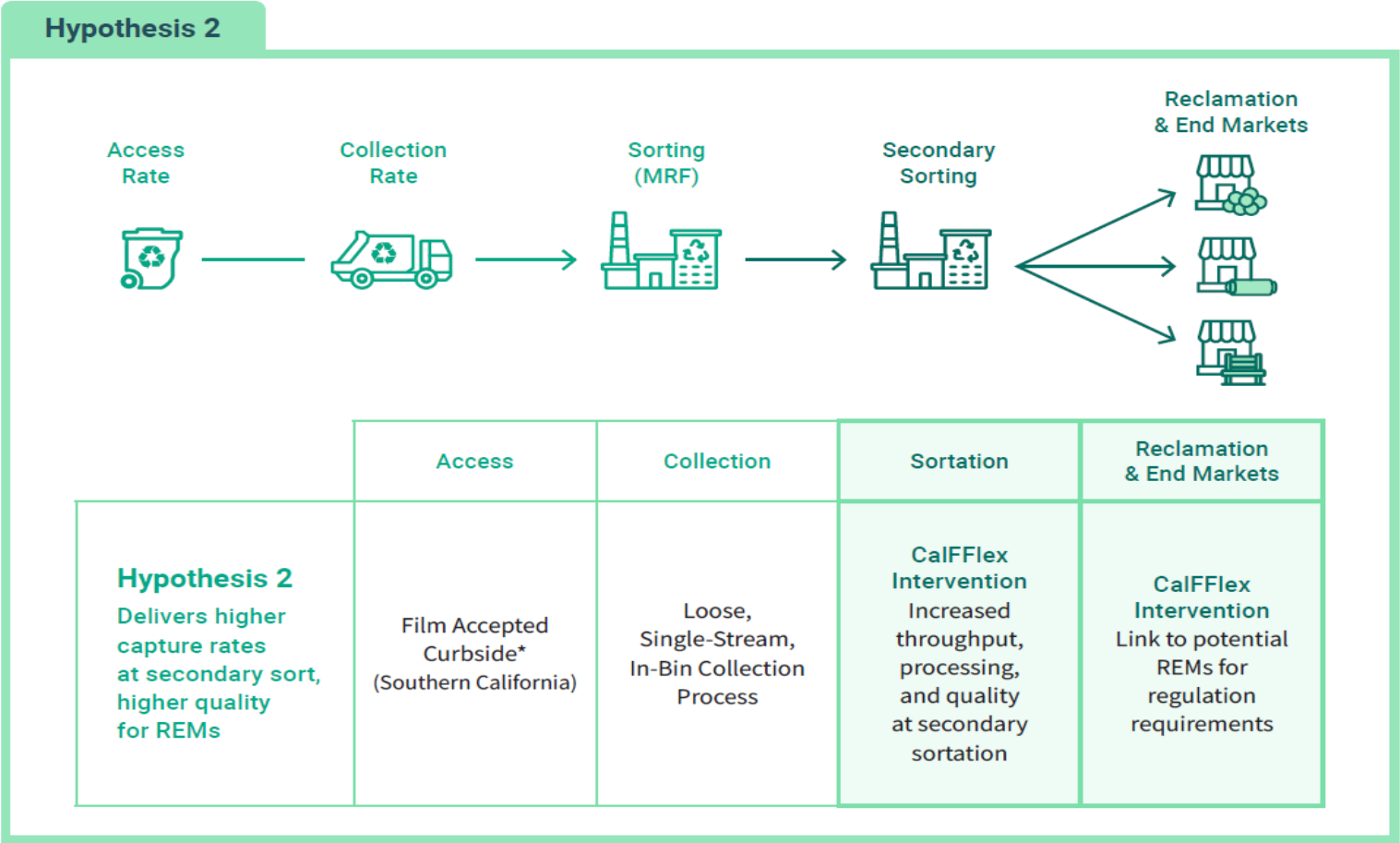
Why CalFFlex HYP #1

Only Bag-in-Bag Scenario **WITH (1) Optical** for Cost/Benefit and Capture/Quality Analysis



**Solution Gap:
HYPOTH. #1**

**assessing if bag-in-bag with 1 optical = higher capture rate*

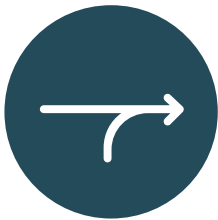


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Why CalFFlex HYP #2?

Secondary Sorter with Diverse Material Sourcing Scenario **WITH (1) Optical** for Opportunity to Expand Capture/Quality



Sort Line

Hypothesis F

2024
2024
2024



Vacuum Hood
with Manual Sort

Hypothesis G

2024



Robotics

Hypothesis H

2022



Optical (1)

Hypothesis I

2024
mobile sort pilot

**Solution Gap:
HYPOTH. #2**

2025
**expansion
with optical*

Thank you to our Film & Flexibles Recycling Coalition Members!

Join our network of industry peers and associations to help CalFFlex achieve its goals.

Steering Committee



KraftHeinz



Coalition Members



ExxonMobil

Ferrara



L'ORÉAL
USA



scJohnson
A family company
at work for a better world



Advisory Committee



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Get in Touch:

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🌐 recyclingpartnership.org/film-and-flexibles/



We're a purpose-driven organization committed to building a better recycling system that delivers economic and environmental benefits for communities and the industry.