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WPS INSIGHTS

MARCH 2026

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March highlights a clear shift in how the packaging industry is solving for sustainability, moving from broad material replacement to precision-led design, regulatory readiness, and cost resilience.

Monomaterial structures are scaling across categories, not just to meet recyclability targets, but to deliver application-specific performance; from respiration control in fresh produce to strength and shelf stability in fertilizers. At the same time, innovation is moving beyond new material discovery toward engineering performance through film architecture, unlocking barrier and strength using existing polymers.

However, this progress is unfolding against a backdrop of rising material volatility, where tariffs, trade policy, and geopolitical disruptions are directly influencing input costs and pricing strategies. In parallel, next-generation alternatives from biodegradable multilayer systems to mycelium-based materials are advancing toward real-world viability by addressing both functionality and scalability.

The direction is clear. Packaging innovation is no longer about isolated breakthroughs, it is about integrating performance, compliance, and economics into deployable solutions.

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EXECUTIVE TAKEAWAYS

- Monomaterial is becoming the default direction.
- From fresh produce to fertilizers, packaging is converging toward recyclable single-polymer structures aligned with PPWR targets.
- Performance is being engineered, not chemically invented.
- Advanced film architectures are unlocking barrier and strength properties using existing polymers, reducing reliance on new resin development.
- Geopolitics is now a packaging risk factor.
- Tariffs, trade policy, and regional conflicts are directly influencing material costs and pricing dynamics in the metal packaging industry.
- Next-gen materials are balancing sustainability with functionality.
- From agricultural waste to mycelium-based films, alternatives are now matching real-world packaging requirements not just sustainability claims.

Recyclable BOPP Films Redefine Fresh Produce Packaging

WHY IT MATTERS

Fresh produce packaging must balance breathability, visibility, and durability while now also meeting recyclability mandates under evolving EU regulations.

EXECUTIVE TAKEAWAYS

- Innovia Films introduced a recyclable BOPP film (P2G) for flow-wrapped fresh produce
- [redacted]
- [redacted]
- Can integrate chemically recycled and bio-based certified polymers via mass balance
- High gas transmission enables respiration control for fresh produce
- Enhances shelf life, product quality, and visual appeal
- Heat-sealable, printable, and optically clear
- Maintains strength and puncture resistance across supply chain conditions

LESSONS & ACTIONABLES

Recyclable formats must now deliver product-specific functionality (like respiration control) not just sustainability compliance.

Amcor Advances Recyclable PE Packaging with PCR Integration

WHY IT MATTERS

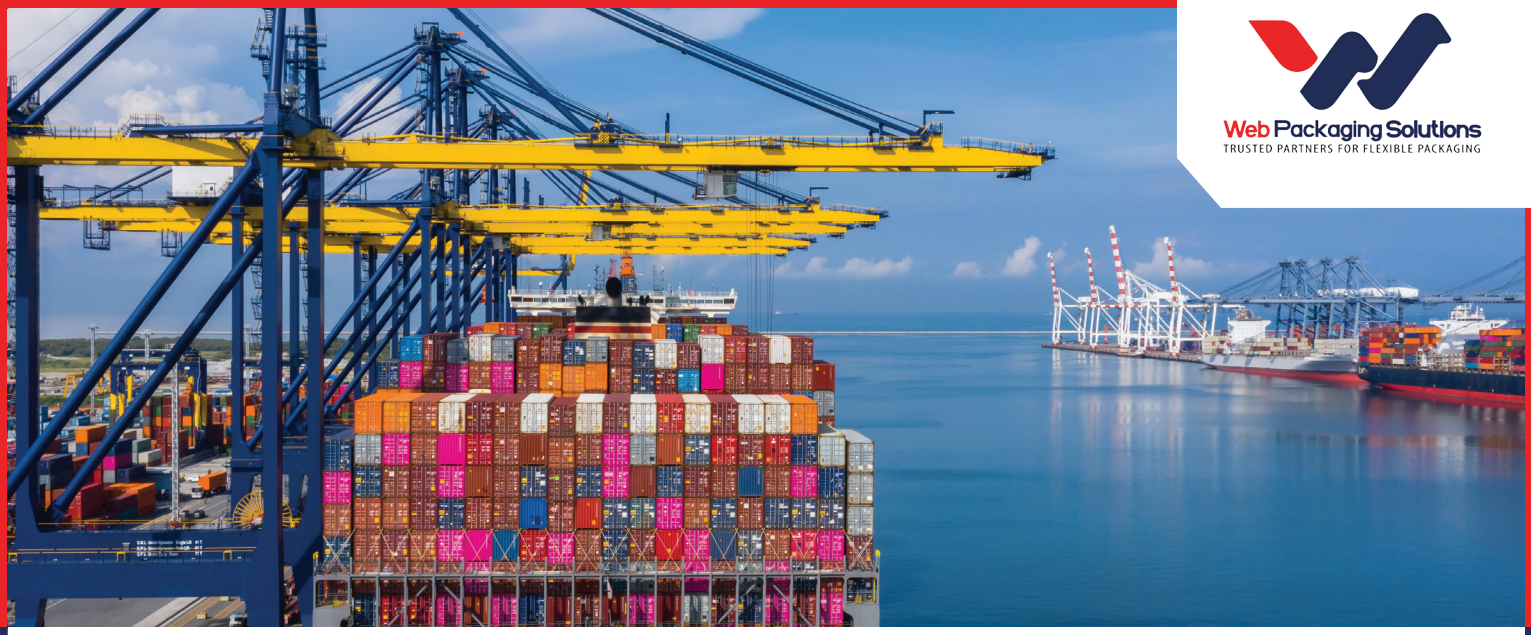
The shift from multimaterial to monomaterial packaging is accelerating but performance, strength, and shelf presence remain non-negotiable.

EXECUTIVE TAKEAWAYS

- Amcor launched a recyclable PE-based solution for fertilizer packaging
- Replaces non-recyclable multimaterial structures
- Incorporates 35% post-consumer recycled content
- Achieves ~17% lower carbon footprint (based on LCA)
- Uses MDO-PE with functional sealant for barrier protection
- Delivers high strength, puncture resistance, and secure sealing
- Structural rigidity helps packs remain upright on shelves
- Gloss finish enhances visual appeal
- Aligns with EU PPWR readiness

LESSONS & ACTIONABLES

Recyclability alone isn't enough, PCR integration + performance parity is becoming the new benchmark.



Tariffs and Geopolitics Drive Cost Pressures in Metal Packaging

WHY IT MATTERS

Material cost volatility is no longer cyclical it is increasingly shaped by trade policy and geopolitical instability.

EXECUTIVE TAKEAWAYS

- Aluminum prices surged, with U.S. Midwest Premium crossing $1/lb
- Section 232 tariffs on aluminum and tinplate remain in force
- [redacted]
- Packaging companies are passing increased costs to customers
- Canned food prices saw notable increases in late 2025
- Further price escalation expected in 2026
- [redacted]
- Ongoing geopolitical tensions (including Middle East disruptions) risk supply instability
- [redacted]

LESSONS & ACTIONABLES

Packaging strategy must now account for trade exposure, sourcing risk, and cost pass-through resilience.

Film Architecture Emerges as a Disruptor to Material Innovation

WHY IT MATTERS

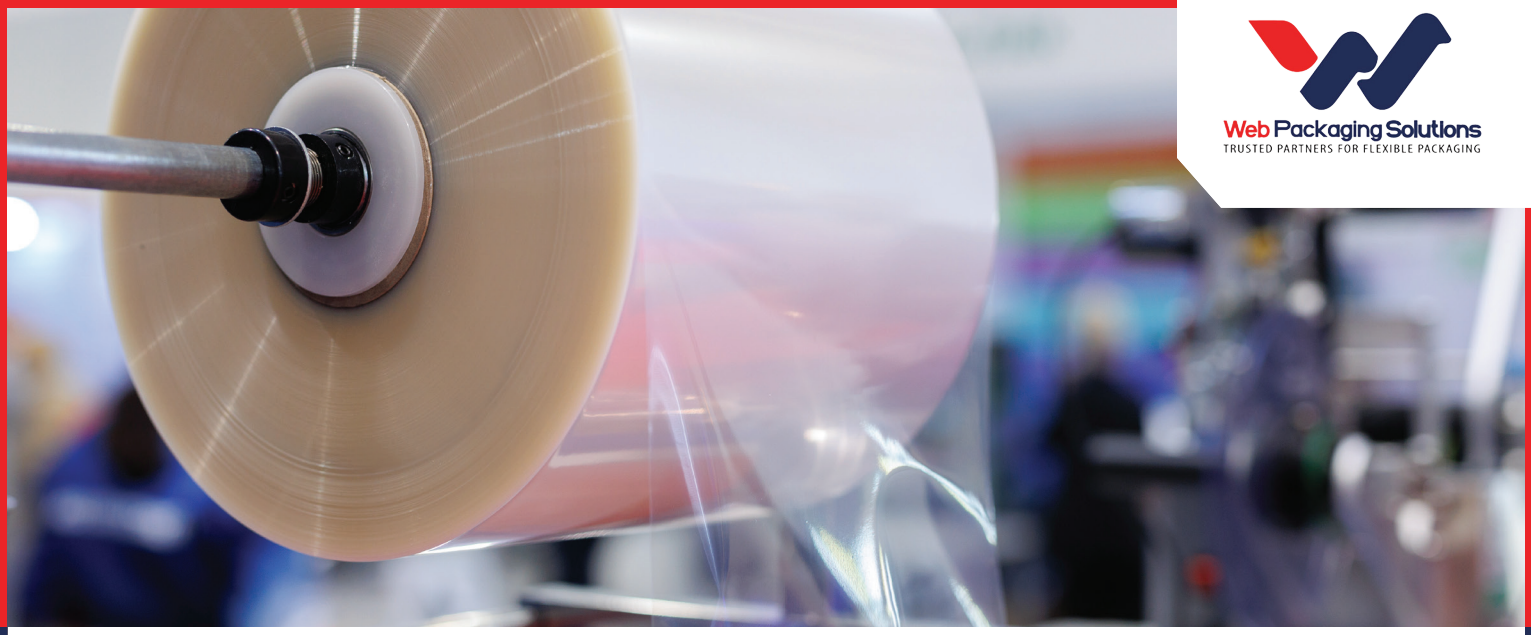
The industry is rethinking innovation, shifting from new material discovery to engineering performance through structure.

EXECUTIVE TAKEAWAYS

- Peak Nano introduced a “Films as a Service” (FaaS) platform
- Enables rapid development of custom high-performance films
- Uses nanolayer coextrusion to stack hundreds to thousands of layers
- Allows precise tuning of barrier, strength, optical, and thermal properties
- Works with commercially available polymers - no need for new resin development
- Reduces cost by replacing specialty materials
- Accelerates time-to-market (weeks vs years)
- Scalable using existing industrial processes
- Supports recyclability, downgauging, and higher recycled content

LESSONS & ACTIONABLES

Competitive advantage will shift toward how materials are structured not just what they are made of.



Biodegradable Multilayer Films Push Toward Circular Alternatives

WHY IT MATTERS

The challenge with multilayer packaging has always been end-of-life. New approaches aim to solve this without compromising performance.

EXECUTIVE TAKEAWAYS

- New R&D initiative focuses on biodegradable nanolayer films
- Designed to replace hard-to-recycle multilayer structures
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- Targets reduction in microplastic pollution
- Built using scalable nanolayer technologies
- Backed by institutional research and innovation hubs

LESSONS & ACTIONABLES

Future-ready multilayer solutions must integrate performance + engineered biodegradability from the design stage.

Mycelium-Based Packaging Moves Closer to Scalable Reality

WHY IT MATTERS

Alternative materials are advancing beyond concept demonstrating real potential to replace plastics in food packaging.

EXECUTIVE TAKEAWAYS

- Developed using mycelium (fungal networks) and cellulose nanofibrils by the University of Maine.
- [redacted]
- [redacted]
- Suitable for food packaging applications
- Can be applied as coatings or standalone films
- New process reduces production time from weeks to ~3 days
- Scaling pathway includes roll-to-roll manufacturing
- Material thickness and performance optimized for commercial use

LESSONS & ACTIONABLES

Bio-based materials will scale when they achieve performance parity + manufacturing speed + cost efficiency.

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