

# Packaging paradigm

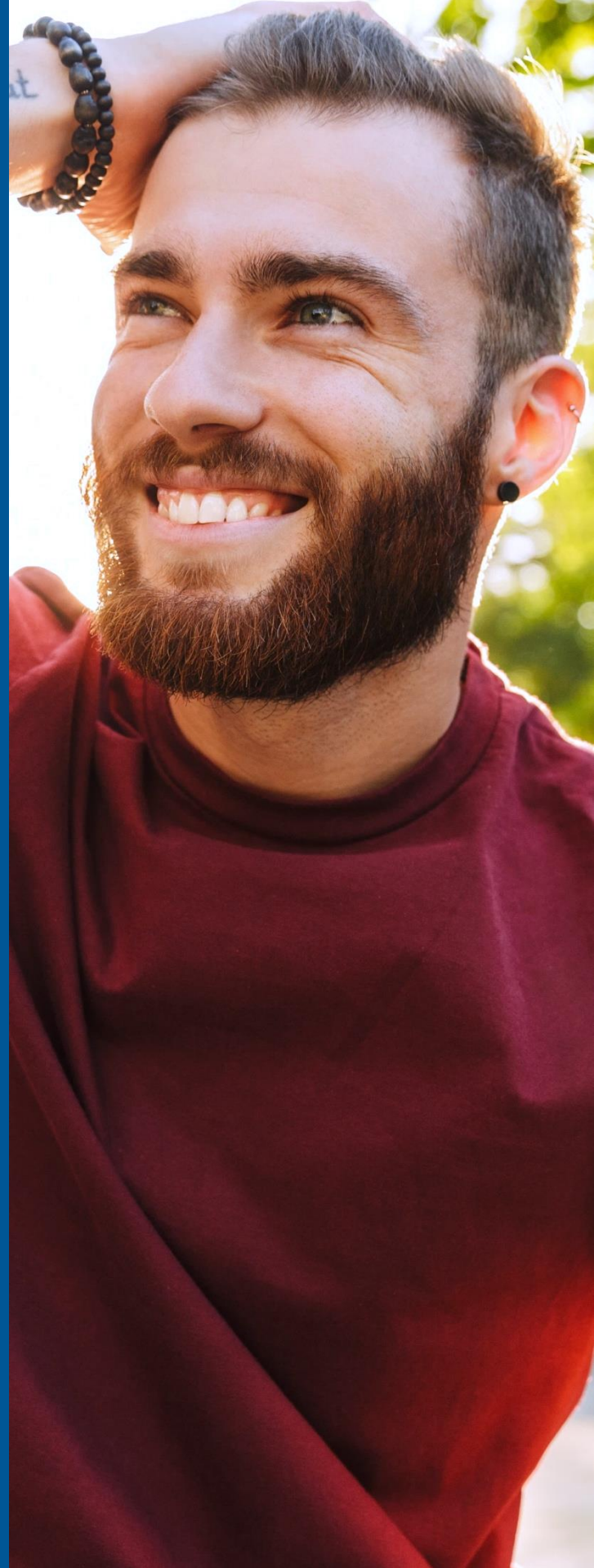
After five years of massive disruption, the U.S. consumer packaged goods (CPG) landscape is becoming even more challenging as leading players face uncertain economic conditions, fickle consumers and bold sustainability commitments that are coming due. With leading players looking to deliver a differentiated customer experience while balancing gross margin improvements, experimentation with new technologies, and investor expectations, backing away from sustainability commitments risks alienating the U.S. shopper who is increasingly concerned about plastic waste.

As CPG brands look towards pathways to meet their sustainability commitments, U.S. consumers are becoming clearer about their expectations for sustainable packaging — seeking recyclability, high levels of recycled content and the creation of a circular economy for plastic packaging within the U.S.

Eastman is a sustainable solutions provider with over 100 years of experience in improving the quality of life around the world in a material way. Eastman's circular PET solutions, underpinned by its molecular recycling technology, offer recyclability and high levels of recycled content without tradeoffs in safety, quality or aesthetics.

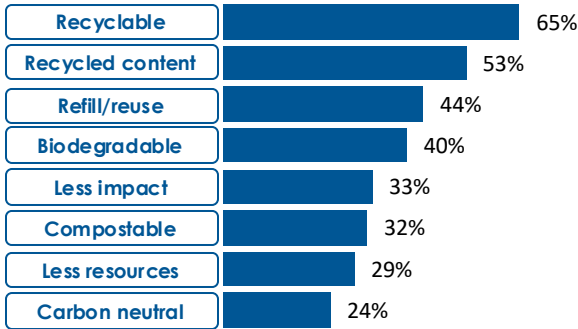
To learn more about how Eastman's circular PET solutions can be the backbone of your company's sustainability and growth strategies, please contact Saskia Hornivius or your Eastman account representative.

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# Sustainable strategies

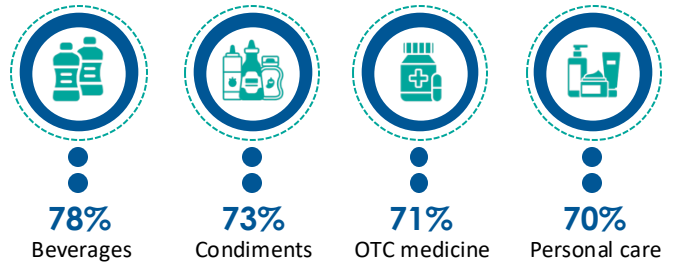
## What would make plastic packaging more sustainable among U.S. consumers



The plastic waste crisis is a top-tier environmental concern among U.S. consumers, and they are looking for help from brands and retailers to solve the waste crisis. While a number of solutions exist to develop more sustainable packaging for everyday products, U.S. consumers are most focused on recyclability and recycled content. When asked to explain what would make beverage, condiment, personal care and OTC medicine packaging more sustainable, the majority of U.S. consumers cited the ability for the packaging to be recyclable (65%) and be made with recycled content (53%).

# Recycling revolution

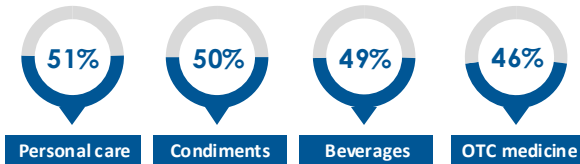
## U.S. consumer interest in the following packaging types to be made through molecular recycling\*



Molecular recycling, which takes hard to recycle plastics and breaks them down into molecules to be used to create virgin-like, pristine plastics that do not compromise on quality, safety or aesthetics, could be a solution to better align sustainable packaging offerings with consumer expectations. Once educated on molecular recycling, about 3 in 4 U.S. consumers say they would prefer their everyday packaging products to be made through the technology. In fact, interest in packaging made through molecular recycling jumps when consumers know the packaging can be recycled in the U.S. (82%), can have up to 100% recycled content (80%), and is made from plastic waste from the U.S. (77%).

# Setting expectations

## Minimum amount of recycled plastic U.S. consumers expect in the following packaging



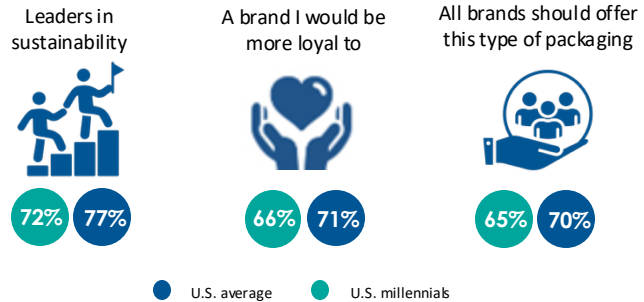
When it comes to ensuring packaging is recyclable and contains recycled content, brands and retailers have an opportunity to better align their offerings with consumer expectations. On average, U.S. consumers expect packaging labeled as having recycled content to contain a minimum of at least 50% recycled plastic. Regionality also plays a key role within consumer expectations. In fact, 3 in 4 U.S. consumers expect plastic waste used to make recycled plastic packaging to come from the U.S. or within North America. In addition, 3 in 4 expect the recycling of packaging to occur within the U.S. or North America. Unfortunately, existing recycling technologies may not be able to meet consumer expectations for high levels of recycled content or regionality.

### About the research

Eastman's 2025 U.S. Circular Packaging Study was conducted among 2,000 men and women ages 18-70 who were primary purchasers of condiment, beverage, personal care and/or over-the-counter medicine. Respondents were representative of the U.S. population within quotas.

# Molecular momentum

## Sentiment towards brands using molecular recycling in their packaging



Eastman's circular PET solutions, which are created through molecular recycling, have the potential to drive equity and loyalty for packaging brands and retailers. About 2 in 3 U.S. consumers say brands using Molecular Recycling to make their packaging are leaders in sustainability (72%) and brands they would be more loyal to (66%) — driven by Millennial consumers. In fact, close to 2 in 3 consumers feel that all brands should offer packaging made through molecular recycling.

To learn more about how Eastman's circular PET solutions can enable your brand to meet its sustainability commitments while driving consumer loyalty, please contact Saskia Hornivius ([Saskia.Hornivius@eastman.com](mailto:Saskia.Hornivius@eastman.com)).

\*Respondents were educated on molecular recycling.