Private Brands, Public Impact

How Retailers Can Lead on EPR





Paul Nowak
Executive Director

greenblue

30+ Years industry experience

Long-standing relationships in packaging community

Grew up in converting

greenblue

GreenBlue is an environmental nonprofit dedicated to empowering a diversity of stakeholders to promote a more sustainable materials economy.

Projects of GreenBlue

SUSTAINABLE PACKAGING COALITION®

How2Recycle

How2Compost

CLEANGREDIENTS®

recycled material STANDARD

greenblue events



1400+ Members of SPC & H2R

Brand | Retail | Manufacturer | Supplier | Gov't | Education | Consultant | Converter

greenblue



Refill-At-Home



Compostable Packaging



Environmental Tradeoffs



Recycled Content



Paper Packaging Recyclability



EPR



Global Solutions



Consumer Behavior



Store Drop-Off



Recovery Technology

Get involved with our Collaboratives!

Driving Change Through Collaboration

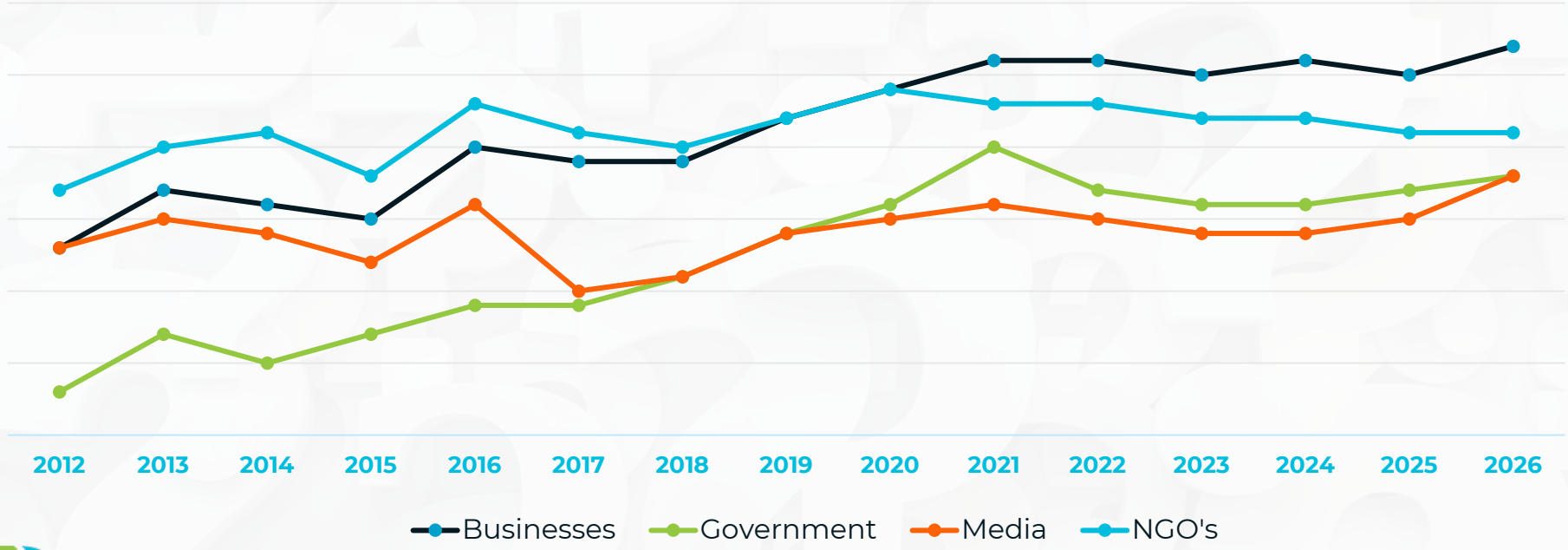
A Source of Truth

Who does the consumer trust?



Brands Fill the Trust Void

Over 28 countries surveyed, brands have earned trust while it stays stagnant for institutions. While trust is a powerful differentiator, it also comes with greater responsibilities.



*Edelman www.edelman.com/trust/25years

Responsibility Through the Consumer Lens

76%

Hold companies responsible for making changes that positively impact environment

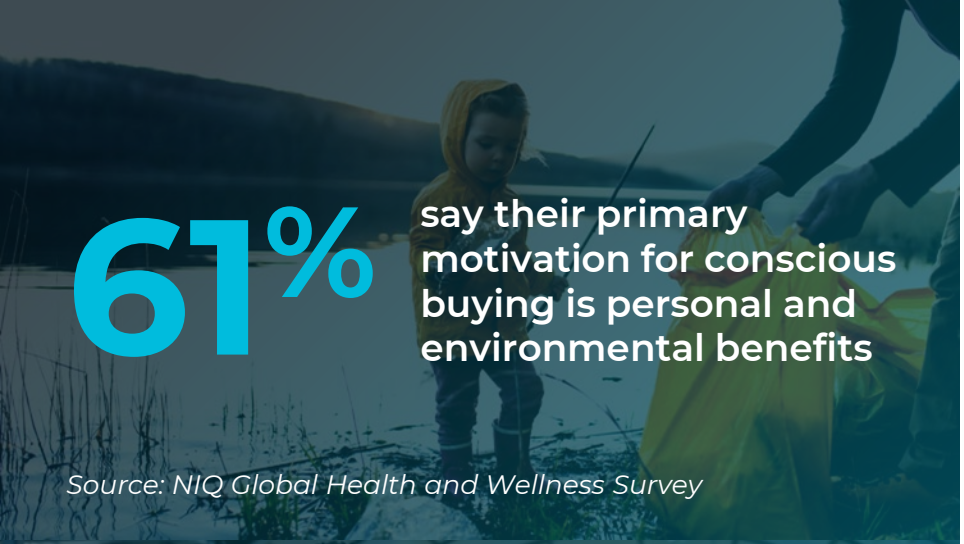
83%

Believe that companies should be responsible for end-of-life disposal of items

75%

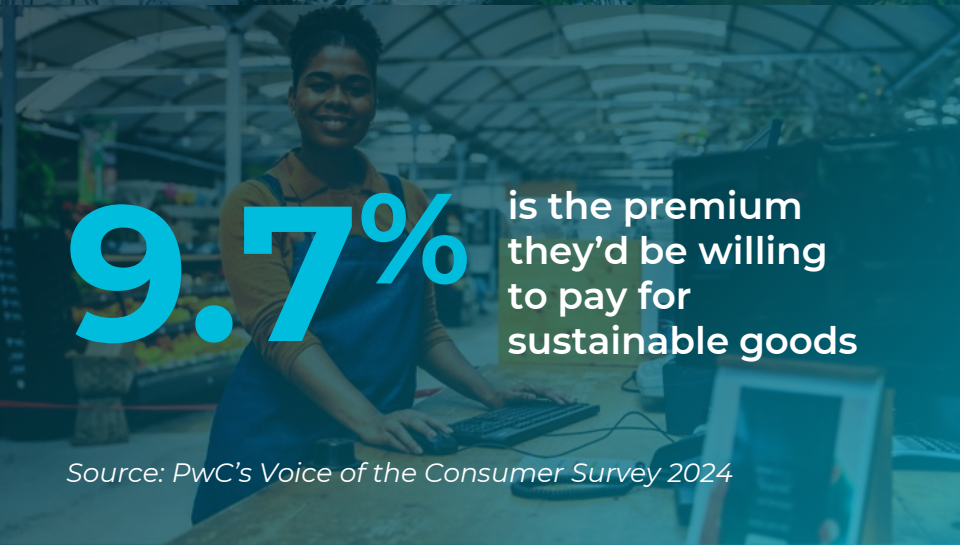
Of consumers want to be seen as someone who buys & uses environmentally friendly products

**ERM Shelton 2024, US*



61% say their primary motivation for conscious buying is personal and environmental benefits

Source: NIQ Global Health and Wellness Survey



9.7% is the premium they'd be willing to pay for sustainable goods

Source: PwC's Voice of the Consumer Survey 2024

The Say – Do Gap

>1%

actually made a purchase

Who's Leading the Way

















Private Label

&

Consumer Packaged Goods



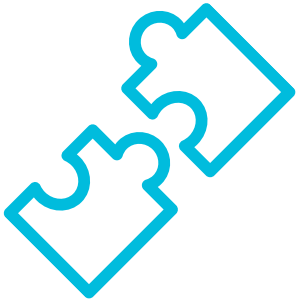
Reduction

Optimizing to only essential material needed



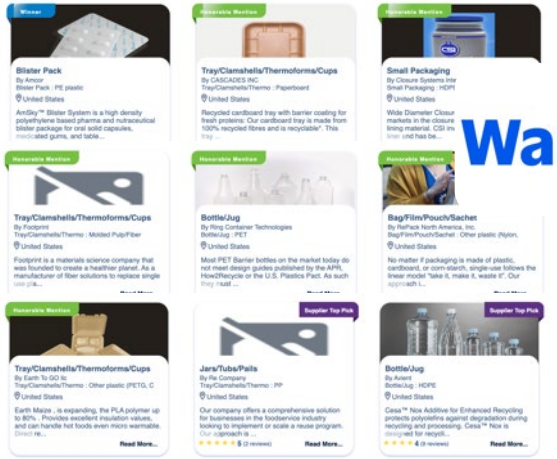
Procurement

Transparency throughout supply chain, use of recycled content



Recyclability

Design with compatibility with existing infrastructure in mind



Walmart

Packaging Circular Connector

amazon

Packaging Matrix



Polypropylene Cups Earn Widely Recyclable Designation



With help from partners including:

How2Recycle

CLOSED LOOP partners

WM

The Recycling Partnership

COLGATE-PALMOLIVE

HALEON



Material Choice & Tube Recyclability

Toothpaste tubes, once considered non-recyclable and destined for landfill, have now entered a new era of sustainability.

scJohnson

When Progress Meets Practice

33%
Reduction in virgin plastic

64%
Plastic packaging is recyclable

72%
Emissions reduction

ZERO
Manufacturing waste to landfill

SPC Retailer Forum



A forum for tackling Private Brand supply chain sourcing challenges and opportunities, connecting retailers and packaging converters to identify innovation needs and scale solutions.

amazon

Walmart

target

Ahold Delhaize

DOLLAR TREE

Brief 1

Film & Flexibles

Brief 2

Source Reduction

Brief 3

Refill-at-home Solutions

Brief 4

Reuse Systems for Retails

EPR & Recycled Content



1.96

Million Tonnes Plastic Waste Generated



28%
Collected

16%
Recycled

Canada Plastics Pact (CPP) 2024 Progress Report

Ambitious Goals Target Disposal, Recycled Content

TARGET 3

Undertake ambitious actions to ensure that at least 50% of plastic packaging is effectively recycled or compostable.



Based on the most current and reliable data available, the national recycling rate in deposit return, residential, and industrial, commercial, and institutional systems is estimated at **16%** in 2022.

TARGET 4

Ensure an average of at least 30% recycled content by weight across all plastic packaging.



In 2023, the average amount of post-consumer recycled (PCR) content (by weight) across plastic packaging used by CPP Partners was **10%**. This is a **2%** decline in PCR use from our 2022 annual report; reasons for this decline are explored on page 21.

Recycled Content Claims Study

NAVIGATE

ERM SHELTON

March 2025 research showed that consumers don't understand recycled content, and mostly importantly, it concluded that, once they understood it, recycled content became the #1 most important packaging attribute impacting purchase decisions.

General Mills · Mondelēz International · KraftHeinz · Keurig DrPepper · Campbell's

Where we want to be

Packaging attributes such as recycled content influence consumer choice



New Collaborative Coming 2026!

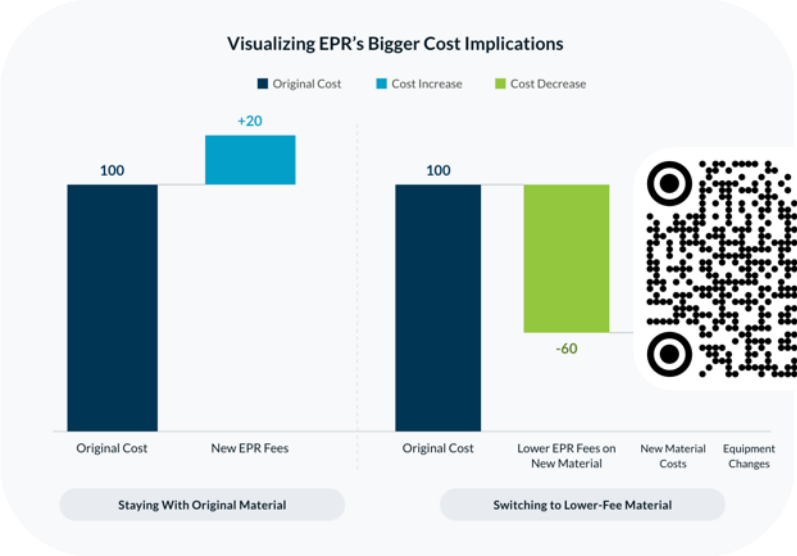
Recycled Content Toolkit

Transform recycled content from a misunderstood packaging attribute into a compelling consumer benefit.



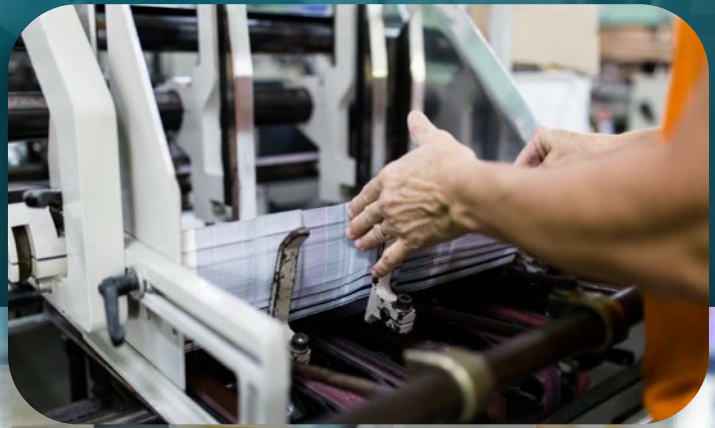
Mitigate Risk While Building Future Value

Portfolio innovation won't just be about cost savings — it will be essential for managing reputational and financial risk.



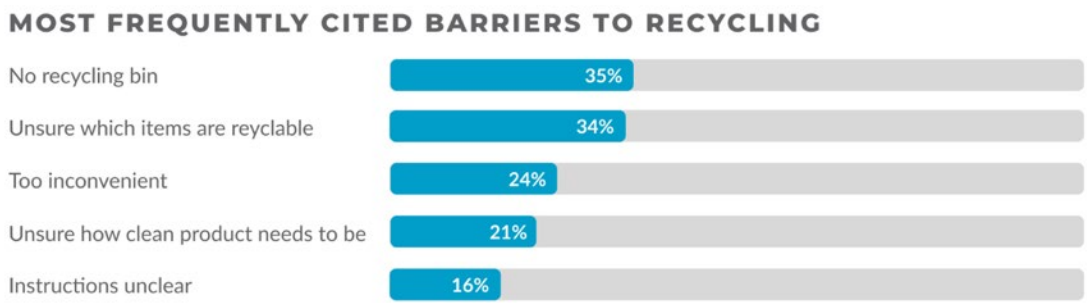
Supply Chain Questions

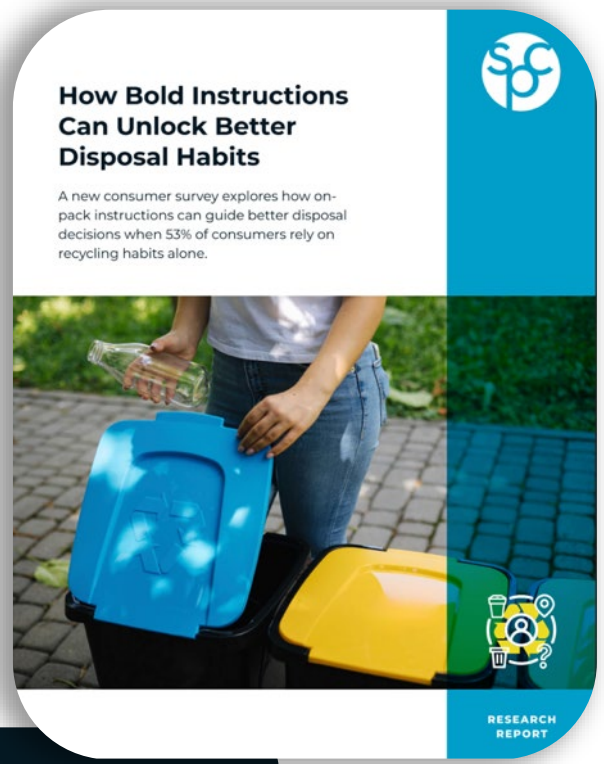
The impact of harmonization initiatives on private label and CPG's in Canada



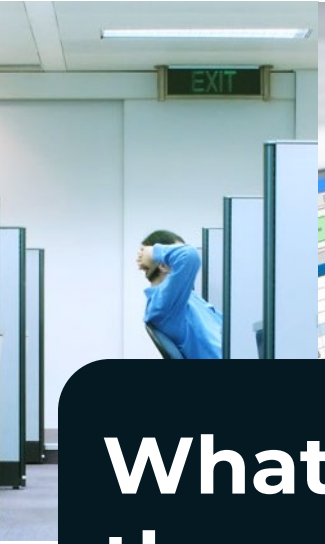


1,000 U.S. consumers shared reactions to North America's most recognizable recyclability label.





How Bold Instructions Can Unlock Better Disposal Habits










What can we achieve through realistic optimism?

Unrealistic Pessimism — **Realistic Pessimism** — **Realistic Optimism** — **Unrealistic Optimism**

Initiative to Develop Harmonized On-Pack Recycling Labels for Canada

Research aims to make recycling easier for Canadians through clear, consistent packaging labels.

greenblue

circular materials

Éco Entreprises Québec

MMSM Multi-Material Stewardship Manitoba

SK Recycles

RECYCLEBC

greenblue events

2027

SPC IMPACT

Portland, OR | April 13-15

SPC ADVANCE | CAA EPR 20 FORUM 27

Co-located in MKE, WI | Sept 28-30



Thank you!

www.greenblue.org