



Sustainable Packaging Innovation Forum USA

October 27th-28th 2026 | Chicago

*From risk to ROI:
How to leverage packaging innovation
for new value creation*

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Day 1, Oct. 27th

9.00am-9.30am **Sustainable packaging innovation: what it means today for industry and consumers**

Regulations like EPR have moved packaging choices onto the boardroom agenda. The brands leading the way are those that see sustainability innovation not as a legal obligation but as a commercial lever: driving material innovation, strengthening consumer loyalty and getting ahead of costs before they become unavoidable. This session sets the scene: what the innovation opportunity looks like today, why the business case is stronger than ever, and what's holding companies back from moving faster. We'll look at:

- **The compliance trap:** Meeting regulatory requirements is necessary, but it's not enough to build a future-proof packaging portfolio. Why should companies invest in packaging innovation, and how to direct resources to meet more than one business need?
- **Pressures and opportunities:** Consumer expectations, regulatory tightening and supply chain risk are real, but so are the opportunities for new markets. Which companies are getting ahead of the curve, how?
- **Why innovation matters:** Even when the right innovation exists – one that works for business and people – the challenge how to scale it to market. What does it actually take to make R&D potential a commercial reality?

9:30am-10:20am **How to leverage packaging as an asset: materials, operations and what actually drives ROI**

Brands and retailers have doubled down on switches to paper, aluminium and glass packaging, but material substitution is just one piece of the puzzle. Across industries, the innovation agenda has expanded: formats are being reimaged, logistics and recycling infrastructure is catching up with design ambition. In the meanwhile, both consumer expectations and regulations are shifting. The question facing every packaging team today isn't whether to innovate, but how to identify what's commercially viable, scalable, and genuinely better – not just better on paper.

- **Material value:** How do businesses cut through the noise and make material decisions grounded in evidence rather than perception, and complement material switches with other solutions?
- **Operational redesign:** Innovative packaging solutions only as good as the infrastructure behind it. How do brand owners make design decisions for today and tomorrow's operational realities?
- **Making the business case:** Packaging innovation and sustainability compete for budget against other business priorities. Which metrics actually resonate with the boardroom, and how to build a financial case that mitigates risk while generating value?

10:20am-11:00am *Break*

11:00-11:40 **EPR compliance infrastructure: what do the rules require and what can the market deliver?**

Seven bills for Extended Producer Responsibility (EPR) on packaging have now passed in the U.S, and the framework is no longer hypothetical. Producers are being asked to navigate a patchwork of requirements that vary significantly state by state, and join collective producer responsibility organisations to fund the end-of-life management of their packaging. This session cuts through the complexity, looking the role do actors across the value chain play to make EPR systems work, and where the gap between regulatory ambition and market reality is more evident.

- **How to stay on top of requirements:** Fee structures, eco-modulation, covered product definitions make EPR compliance very technical. With inconsistencies in how the this is implemented across jurisdictions, how are businesses getting on top of requirements without drowning in complexity?
- **Infrastructure for compliance:** EPR programmes assume recycling collection, sortation and end markets are there to absorb what producers put into the system. In many cases, they aren't yet. How do businesses plan around an infrastructure gap that isn't only theirs to solve, but is theirs to navigate?
- **From cost center to strategic lever:** EPR compliance carries real financial exposure, particularly for difficult-to-recycle materials and formats. How are businesses are getting ahead of fee increases through smarter packaging design?

11:40-12:30 **Innovation that sells: translating consumer behavior into new market opportunities**

Across 11 countries and more than 11,000 consumers, McKinsey's 2025 packaging survey delivers a consistent message: when people shop, sustainability falls behind value and product quality in decision making ([McKinsey, Sustainability in Packaging 2025](#)). For packaging teams, that's not a reason to pull back, but a brief to get creative. This session explores how to read consumer data and behaviour with purpose, and design packaging innovation that meets people where they are. Starting from case studies as proof points, the discussion will explore what it takes for sustainability solutions that scale.

- **Beyond the attitude-behaviour gap:** Consumers say they care about sustainability, but buying decisions tell a different story. How do businesses design packaging innovation around what consumers actually do, rather than what they say?
- **What consumers really want from packaging:** Safety, shelf life and ease of use often outrank environmental impact as packaging priorities. How do you build a sustainability proposition that leads with the benefits consumers already value?
- **Segmentation as a strategic tool:** Attitudes and habits vary significantly by country, product category and channel. How do brands use granular consumer data to make smarter innovation bets rather than chasing a single global trend?

12:30-1:30 *Lunch*

1:30-2:30pm *Solution hubs 1*

- a. **Supply chain data:** Best practice for collection, access and use-case
- b. **Every component counts:** What it means to design with the full lifecycle in mind
- c. **Future-proofing packaging portfolios:** Format changes that work across the value chain

2:30-3:30 *Solution hubs 2*

- a. **Procurement strategies:** Solutions to ensure cost-savings and supply security
- b. **From LCA to business case:** How impact assessments drive decisions beyond reports
- c. **R&D priorities:** How to innovate under cost and compliance pressures

3:30-4:00pm *Break*

4:00-5:00pm **Solution hubs 3**

- a. **Internal buy-in:** Practical approaches to show the ROI from sustainability
- b. **AI and automation in sustainable packaging:** Leading industry applications and strategic opportunities
- c. **Between emission targets and operational realities:** How to navigate the 'carbon challenge'

5:00pm-6:00pm *Networking drinks*

Day 2, Oct. 28th

9am-9:30am **Circular economy as industrial strategy: strengthening domestic value chains and local economies**

The circular economy has grown to be a valid proposition for the future of industry. Circularity is a lever for supply chain resilience, strengthening domestic supply chains: as [The Recycling Partnership](#) reports, better recycling infrastructure alone would generate an estimate of \$8.8 billion in secondary materials ready for local use. Investment in alternative business models and recycling infrastructure isn't just a cost for business, but an opportunity to create jobs, open new market pockets, and scale purpose-driven innovation that elevates the customer experience.

The infrastructure to support the circular transition isn't always missing: in many markets, local circular service providers are already operating. For businesses looking to adapt fast and be able to comply with evolving packaging regulation, partnering with what already exists on the ground may be the smartest first step. This session examines how policy, investment and cross-industry collaboration need to work together to generate value from the circular economy.

- **The infrastructure investment gap:** What does the business case for funding domestic recycling and reuse infrastructure actually look like, and what are effective ways to invest?
- **Supply chain resilience:** How do businesses make the link between circular material flows and a more stable, less import-dependent supply chain?
- **The market conditions for a circular economy:** How are upstream and downstream actors collaborating to close the loop and generate ROI from circularity?

9:30am-10:10am **Recyclability, compostability, and end-of-life-solutions: reality check on advancements and gaps**

The labels say recyclable, the packaging says compostable, but what actually happens at end of life is still hard to track and prove. While recycling and composting have been popular solutions in packaging sustainability strategies, their effectiveness depends on the infrastructure available to process waste. Sorting systems can't yet distinguish compostable materials at a molecular level, contamination drives up costs and compromises output quality across both recycling and composting streams, and end markets for secondary materials remain patchy.

The gap between what's designed upstream and what gets processed downstream is where progress stalls. Closing it requires brand owners, packaging producers and waste managers to be working from the same playbook: in this session, we'll discuss how to do that.

- **Hard-to-recycle formats and the regulatory timeline:** Films, flexibles and multilayer structures are facing increasing regulatory scrutiny and, in some geographies, potential bans. How do businesses get ahead of restrictions on formats that are still core to their portfolio?
- **The contamination problem:** Higher contamination means lower quality feedstock and higher processing costs. Whether it's compostables being landfilled because sortation can't identify them, or recycled streams degraded by mixed materials, how do upstream design decisions determine downstream outcomes?
- **Closing the loop on end markets:** Recyclability and compostability are valuable if there's somewhere for the material to go. What does it take to develop the regenerative end markets that make the whole system work, and who needs to invest in making them viable?

10:10am-10:40am *Networking break*

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10:40am-11:20pm **Reuse at scale: What California's SB 54 provisions mean for business**

California has set one of the most demanding reuse mandates in the world. Under SB 54, a portion of the required 25% reduction in single-use plastic packaging must be achieved specifically through a shift to refillable or reusable systems ([CalRecycle, SB 54](#)). Fee obligations kick in from 2027, and packaging redesign cycles typically take three to five years. Yet, for the most part, reuse is still in pilot phase. Getting it to scale means solving for consumer behavior, reverse logistics and unit economics simultaneously.

The US doesn't need to start from scratch: there's a lot to learn from markets and localities where reuse infrastructure is already embedded in the system. This session examines what scaling reuse actually demands, and what it takes to make reuse a market reality.

- **Design for reuse:** Durability, standardisation, logistics compatibility: what are the design non-negotiables, and where are brands already getting it right?
- **The infrastructure gap:** Collection, cleaning, redistribution and tracking at scale requires coordination across the value chain. How do businesses build a commercially viable reuse system, and who takes ownership of the infrastructure that makes it work?
- **Learnings from markets ahead of the curve:** Examples of reuse systems in Europe and Asia show the real potential of reuse at retail and urban scale. We'll discuss what has worked in those markets, and how transferable are those models in the North American context.

11:20-12:00pm **The role of labels: traceability, compliance and consumer education**

The label is a crucial packaging component: It's the endpoint of supply chain traceability, a vehicle for consumer education, and increasingly a compliance obligation. The question isn't just what information belongs on pack, but how brands manage the growing gap between what they're required to disclose, what consumers actually understand, and what the brand wants to communicate. In this panel, we'll discuss labelling solutions that are quickly adaptable and cost-effective, as legislation continues to evolve.

- **What's in it, and what happens to it:** Consumers increasingly want to know the full story: ingredients, sourcing, and what to do with the packaging once they're done with it. How do brands communicate product and end-of-life information without confusion?
- **What to say, and how to say it:** The narrative that satisfies transparency requirements and sustainability reporting doesn't always translate to what a consumer needs at the point of purchase. We'll look at best practice for consumer communication that is both practical and informative.
- **Closing the gap between claim and reality:** Transparency commitments and 'recyclable' labels are only as credible as the facts and data behind them. How do businesses ensure they can back up what they're putting on pack?

12:00-12:30pm **Collaborate to simplify, compete to differentiate: playbook for cross-industry collaboration**

As the Ellen MacArthur Foundation's 2030 Plastics Agenda makes clear, businesses face systemic barriers they cannot overcome alone in the redesign of the packaging system ([Ellen MacArthur Foundation, 2025](#)). Infrastructure gaps, regulatory requirements, and the question of how to innovate under cost pressures are shared problems. The companies making the most progress are those investing in pre-competitive collaboration to solve them collectively.

But collaboration on the backend doesn't mean homogeneity at the shelf. The challenge is knowing where to pool resources and where to compete - to keep the consumer experience diverse, engaging and brand-led while the system underneath gets simpler and more circular. This session explores what effective cross-industry collaboration looks like in practice, and how to engage without losing competitive edge.

- **Where collaboration creates value:** Standardising materials, pooling data, aligning on infrastructure investment – which areas of the packaging system genuinely benefit from a pre-competitive approach, and how do businesses structure those partnerships without running into commercial or legal roadblocks?
- **Keeping the consumer experience alive:** As value chains collaborate to simplify backend systems, how do brands ensure the consumer-facing experience stays differentiated, innovative and engaging, rather than converging toward a lowest-common-denominator solution?
- **From working groups to real-world outcomes:** Cross-industry initiatives are only as good as what they deliver. What separates the collaborations that drive systemic change from the ones that produce reports?

12:30pm-1:30pm *Lunch*

1:30pm - 3:00pm **Roundtables**

Roundtable A – **Alternative feedstocks and new materials:** How can we reach a common ground on standards and performance?

Roundtable B – **From product protection to brand trust:** Packaging storytelling to build brand loyalty

Roundtable C – **Regulatory harmonization challenges:** Can we make the economics work?

Roundtable D – **Safety, quality, convenience:** How to deliver on what consumers want?

Roundtable E – **Between the local and the global:** Packaging strategies that work across borders

Roundtable F – **Reuse and refill:** Closed loop VS retail scale solutions

Roundtable G – **Infrastructure gaps:** What Industry can build, fund or fix

Roundtable H – **Paperization trends:** A pragmatic look at the 'how' and 'why'

3:00pm-3:20pm **Roundtables wrap-up: Participatory closing session**