



2025 STATE OF THE FLEXIBLE PACKAGING INDUSTRY STRATEGIC OVERVIEW SURVEY - INDUSTRY-WIDE CONVERTER

Introduction and Company Information

All of the information gathered is confidential and will be reported in aggregate. No data or information will be attributed to any one company.

Not all questions require a mandatory answer, but please answer all that you can to guarantee the best results.

If you get to a page where someone else in your company needs to enter data, please follow this process:

1.) Complete as much information as you can. Be sure to hit "Next" button at bottom of each page (that is what saves and registers your input). You may skip a page or questions, but be sure hit the "Next" button.

2.) Go back to the original email you received with the survey link (from todd@ptisglobal via surveymonkey.com) and forward that email to your co-worker who will continue filling out survey. DO NOT try to paste the survey link into an email from your own email system (the system will not save your answers if you do not use the original email for accessing the link).

3.) Please be sure to ensure your colleague alerts you once they have completed entering their data. They can navigate anywhere in the survey using the 'Prev' or 'Next' buttons at the bottom of each page.

4.) When you or a colleague have completed all questions your company is willing to answer and your survey is ready to be submitted, hit the 'Done' button on the final page.

Thank you for your participation.

1. Please add a **key contact** for any survey follow up.

Name

Company

Email Address

Phone Number

2. **NET SALES - FLEXIBLE PACKAGING**

For flexible packaging products, please indicate your company's 2023 & 2024 **Net External Sales** (for the calendar or latest fiscal year) **in Millions of Dollars (to nearest tenth)**.

Example \$35,200,000 would be entered as 35.2):

Note: For U.S. Converters, report net sales for all U.S. facilities (including export sales) but not sales for non U.S. facilities. For International Converters, report sales for products sold in the U.S. only.

Net External Sales **2023**

Net External Sales **2024**

3. What are the number of employees in your organization (focused on flexible packaging). This total should include both salaried and hourly employees, including full time and temporary workers.

Employees **2023**

Employees **2024**

4. Please select the appropriate category for your company based on **annual sales in 2024**. **(Note: new values for the categories)**

Note: Net sales for all U.S. facilities (including export sales) but not sales for non U.S. facilities.

- ☐ Small (<\$10 million)
- ☐ Medium (\$10 million - <\$150 million)
- ☐ Large (\$150 million - <\$1 billion)
- ☐ Very large (≥\$1 Billion)

5. For flexible packaging products, please indicate **the increase or decrease in your company's volume output** for 2023 (versus 2022 levels) and 2024 (versus 2023 levels), expressed as a %. Please use a minus (-) sign for decrease (for the calendar or latest fiscal year).

Example: 3.2 or -1.2

Please utilize whatever measure of volume applies for your business to provide a composite estimate of the overall change in volume for flexible packaging products.

2023 vs. 2022 (percentage change)

2024 vs. 2023 (percentage change)

6. Please provide the change in production totals that your company saw in 2024 versus 2023, in **total MSI growth** and/or **pounds of growth** (expressed as a percentage and without the percent sign). (For example for 3.2%, use 3.2. For negative values, please use the '-' symbol.)

Production Change for

2024 vs. 2023

(measured in MSI)

Production Change for

2024 vs. 2023

(measured in pounds)

Production Change for

2024 vs. 2023 (as

measured by company)



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Products and Formats

This page focuses on products and formats your company manufacturers.

7. Indicate which of the following **Products/Formats** are manufactured and sold by your company including those Products/Formats sold and shipped as Rollstock. **Please estimate as a % of net sales for 2023 and 2024.**

Note: The sum should add up to 100.

	2023	2024
Rollstock - Primary Product Filling	<input type="text"/>	<input type="text"/>
Rollstock - Secondary or Sleeve Packaging	<input type="text"/>	<input type="text"/>
Rollstock - Bundling/ Overwraps	<input type="text"/>	<input type="text"/>
Retail Carry Bags	<input type="text"/>	<input type="text"/>
Storage and Trash	<input type="text"/>	<input type="text"/>
Premade, Lay Flat, Retort Pouch	<input type="text"/>	<input type="text"/>
Premade, Stand-up, Retort Pouch	<input type="text"/>	<input type="text"/>
Premade, Lay Flat, Non-retort Pouch	<input type="text"/>	<input type="text"/>
Premade, Stand-up, Non-retort Pouch	<input type="text"/>	<input type="text"/>
Shrink Bags	<input type="text"/>	<input type="text"/>
Labels - Die Cut	<input type="text"/>	<input type="text"/>
Lidding - Die Cut and Pre Cut	<input type="text"/>	<input type="text"/>
Other	<input type="text"/>	<input type="text"/>

Other (please specify)

8. For the Rollstock products provided in the previous question, please indicate your best estimate of how your roll stock use is broken down into final **Products/Formats/Packaging applications (in percent of net sales) for 2023 and 2024.**

Total should equal 100.

	2023	2024
Bag & Pouches, Lay Flat, Retort	<input type="text"/>	<input type="text"/>
Bag & Pouches, Stand-up, Retort	<input type="text"/>	<input type="text"/>
Bag & Pouches, Lay Flat, Non-retort	<input type="text"/>	<input type="text"/>
Bag & Pouches, Stand-up, Non-retort	<input type="text"/>	<input type="text"/>
Shrink Sleeves	<input type="text"/>	<input type="text"/>
Labels	<input type="text"/>	<input type="text"/>
Lidding	<input type="text"/>	<input type="text"/>
Sachets	<input type="text"/>	<input type="text"/>
Stick Packs	<input type="text"/>	<input type="text"/>
Shrink Wrap	<input type="text"/>	<input type="text"/>
Stretch Films	<input type="text"/>	<input type="text"/>
Wrappers/Wraps (Food/Sandwich)	<input type="text"/>	<input type="text"/>
Shipping (Primary Packaging)	<input type="text"/>	<input type="text"/>
Shipping (Secondary, Dunnage, Mailers)	<input type="text"/>	<input type="text"/>
Other	<input type="text"/>	<input type="text"/>

Other (Please specify)



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End-use Markets and Outlets

This page is one question, focusing on the sales in specific end markets for your products.

9. Please Indicate the **approximate percent of your sales** for each of the following **end-use markets** for **2023 and 2024** (total for each year should equal 100):

	2023	2024
Food (Retail & Inst)	<input type="text"/>	<input type="text"/>
Food (non-retail)	<input type="text"/>	<input type="text"/>
Beverages	<input type="text"/>	<input type="text"/>
Personal Care	<input type="text"/>	<input type="text"/>
Pet Food	<input type="text"/>	<input type="text"/>
Tobacco/Cannabis (smoking/vaping)	<input type="text"/>	<input type="text"/>
Other Retail (non-food)	<input type="text"/>	<input type="text"/>
Institutional (non-food)	<input type="text"/>	<input type="text"/>
Industrial Applications	<input type="text"/>	<input type="text"/>
Medical Devices & Pharma	<input type="text"/>	<input type="text"/>
Nutraceuticals/Cannabis (non-smoking/vaping)	<input type="text"/>	<input type="text"/>
Shipping	<input type="text"/>	<input type="text"/>
Consumer Products	<input type="text"/>	<input type="text"/>

10. If you marked that your company is involved in the **"Food (Retail & Inst)"** category in the previous question, approximately **what percent of your sales are in each of the following categories for 2024?**

(Please only use whole numbers. Your sum should equal 100.)

Confectionery	<input type="text"/>
Fresh Produce	<input type="text"/>
Fresh 'Other'	<input type="text"/>
Frozen Protein	<input type="text"/>
Frozen 'Other'	<input type="text"/>
Refrigerated Dairy	<input type="text"/>
Refrigerated Protein	<input type="text"/>
Salty Snacks	<input type="text"/>
Shelf Stable Goods	<input type="text"/>
Other	<input type="text"/>



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Operations, Cost & Profitability

11. Please provide **expenses/costs and profit margin** for **2023** as a **% of flexible packaging** related to **net sales**: (The total should add up to 100.)

Direct Materials

Direct Labor

Sales/Mktg, Admin, R&D

All Other Mfg Costs

Company Profit Margin Before Tax (operating profit)

12. Please provide **expenses/costs and profit margin** for **2024** as a **% of flexible packaging** related to **net sales**: (The total should add up to 100.)

Direct Materials

Direct Labor

Sales/Mktg, Admin, R&D

All Other Mfg Costs

Company Profit Margin Before Tax (operating profit)



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Printing

13. Please estimate the **percent** of your company's sales for the following print categories for 2023 and 2024 (Total should equal 100).

	2023	2024
Gravure	<input type="text"/>	<input type="text"/>
Offset	<input type="text"/>	<input type="text"/>
Flexo	<input type="text"/>	<input type="text"/>
Digital	<input type="text"/>	<input type="text"/>
Unprinted	<input type="text"/>	<input type="text"/>
Other	<input type="text"/>	<input type="text"/>

Other (please specify)

14. Where are you making investment in your printing infrastructure?

- ☐ Gravure
- ☐ Offset
- ☐ Flexo
- ☐ Digital

Other printing technology (please specify) or other comments



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Outlook

The page looks at your projections of where you see growth and opportunity for flexible packaging over the next 3-5 years.

15. Please indicate those **issues** expected to be the **most important to your company in the year (2025)** by selecting the **top 5 issues in the list, with # 1 as the most important**.

In the text box, please describe what's driving the top issues & why they are important.

	Most Important	2nd	3rd	4th	5th
Labor Pool	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Management Talent	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Raw Materials Pricing	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Growth/New Products	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Sustainability/Green Initiatives	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Productivity/Cost Reductions	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Government Regulations	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Technology	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Profit Margin	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Imports/International Sourcing	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Political Uncertainty	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Economy	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Pandemic	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Prices (to customers)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Logistics/Transportation	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Supply Chain Resilience	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Plastic Perception/Backlash	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Other	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Why are these the most important issues to your business?

16. Looking ahead to the current year **(2025)** and out the next three years **(2028)**, what are your company's expectations of annual growth in **net sales and volume** (by weight)?

Please indicate annual growth rate percentage expected (ex. 3.2 or -1.2):

Net Sales (2025 vs 2024)

Net Sales (2028 vs. 2024)

Volume (growth % - weight) (2025 vs. 2024)

Volume (growth % - weight) (2028 vs. 2024)

17. Please describe **your vision** of **where the flexible packaging industry is headed** over the **next 3-5 years**.

18. What type of **developing technologies** will have the **most impact** on flexible packaging **over the next 3-5 years**?

(Examples: Artificial intelligence, cobots, automation, augmented reality, Internet of Packaging, new sealing techniques, recyclable monolayer structures, paper with barrier coatings or other.)

19. What do you see as the **future impact of developing tools & technologies on your business**? (This may include software, digital printing, adding QR or digital codes, traceability, etc.)

20. **What keeps you up at night**? (What are 'big issues' that your company or the flexible packaging industry needs to address?)



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FINAL PAGE

If your survey is complete, please hit the "DONE" button and your data will be submitted. An email with your company responses will be sent to the original contact upon survey completion.

If you need to continue adding data, please do not hit the 'Done' button. You can forward the original email with the survey link to a colleague to help complete specific questions.

Thank you for taking the time to complete this extensive survey. The final report will be a great benefit for our flexible packaging community.