

GLOBAL PACKAGING COMPLIANCE

PPWR vs. U.S. EPR

Current as of May 2026



Why This Matters Now

Packaging regulation is accelerating on both sides of the Atlantic. In the U.S., seven states have enacted Extended Producer Responsibility (EPR) laws covering personal care products, with fees now active in Colorado and Oregon and producer registration underway in California. More states are also actively considering similar legislation. In the European Union, the Packaging and Packaging Waste Regulation (PPWR) entered into force in February 2025 and takes full effect in August 2026.

For personal care brands operating in both markets, the compliance picture has never been more complex or more consequential.

The EU Approach: Harmonized and Escalating

The EU has operated under packaging EPR principles since 1994. The PPWR represents a significant structural upgrade that unifies a previous patchwork of national directives into a single, binding regulation applicable across all 27 member states. Core requirements include:

- All packaging must be recyclable by 2030. A recyclability grading system takes effect in 2030, with stricter obligations beginning in 2038.
- Minimum recycled content is mandatory. Plastic packaging must meet post-consumer recycled (PCR) content thresholds, with limited exceptions for pharmaceutical and infant packaging and some medical applications.
- Source reduction is built in. Packaging must minimize weight and volume. Deceptive formats like double walls or false bottoms are prohibited. By 2030, transport and e-commerce packaging cannot exceed 50 percent empty space.
- Single-use formats face restrictions. Beginning in 2030, certain single-use packaging formats are banned where more sustainable alternatives exist.

This explicitly includes small, single-use cosmetic and toiletry products provided in hotel and hospitality settings.

- Producers bear full lifecycle responsibility. EPR fees are eco-modulated, meaning they're tied to a package's recyclability grade. This creates a direct financial incentive to design for end-of-life. The European Commission published implementation guidance in March 2026 to support compliance.

The U.S. Approach: Fragmented and Accelerating

Unlike the EU's unified framework, U.S. EPR is a state-by-state patchwork. Seven states (Maine, Oregon, Colorado, California, Minnesota, Maryland and Washington) have enacted packaging EPR laws covering personal care products. While they share a common structure, the specifics vary enough to create compliance complexity for brands selling nationally.

However, their core mechanics are consistent: producers of covered packaging must register with a Producer Responsibility Organization (PRO), report packaging data annually and pay fees that fund recycling infrastructure improvements. The Circular Action Alliance (CAA) serves as the PRO across all active programs.



Key Variations by State

- **California** SB 54 is the most far-reaching. It requires that 100 percent of single-use packaging sold in the state be recyclable or compostable by 2032 and includes source reduction requirements. Producer registration began in 2025, with fee obligations starting in 2027. California's market size effectively makes it the de facto national standard. A separate California law, SB 343, a 2021 "truth in labeling" measure that tightens recyclability labeling criteria, is the subject of a March 2026 constitutional challenge filed by a coalition of 21 business organizations, including PCPC, alleging free speech violations. The law is slated to take effect October 4, 2026.
- **Oregon** was the first state to launch a fully operational program with SB 582, with fees active since July 2025. Oregon is also the subject of the first federal court order pausing enforcement of a state EPR law on constitutional grounds. The pause, issued in February 2026, applies only to the plaintiff association and its members. The case's dormant Commerce Clause argument, that state EPR laws impose impermissible burdens on interstate commerce, could affect other state programs if the challenge succeeds.
- **Colorado** producer fees became active January 1, 2026.
- **Maine** enacted the nation's first packaging EPR law in 2021. The state has not yet selected a stewardship organization to administer the program, so producer registration requirements are not yet in effect.
- **Minnesota** uses a phased shared-responsibility model. Producers will begin covering 50 percent of net recycling costs in February 2029, scaling to 90 percent by 2031.
- **Maryland's** EPR program is in early implementation. It permits multiple PROs to operate concurrently. Producers must register with a PRO by July 1, 2026.
- **Washington** has enacted EPR legislation but fees do not begin until 2030.

A note on Global Programs

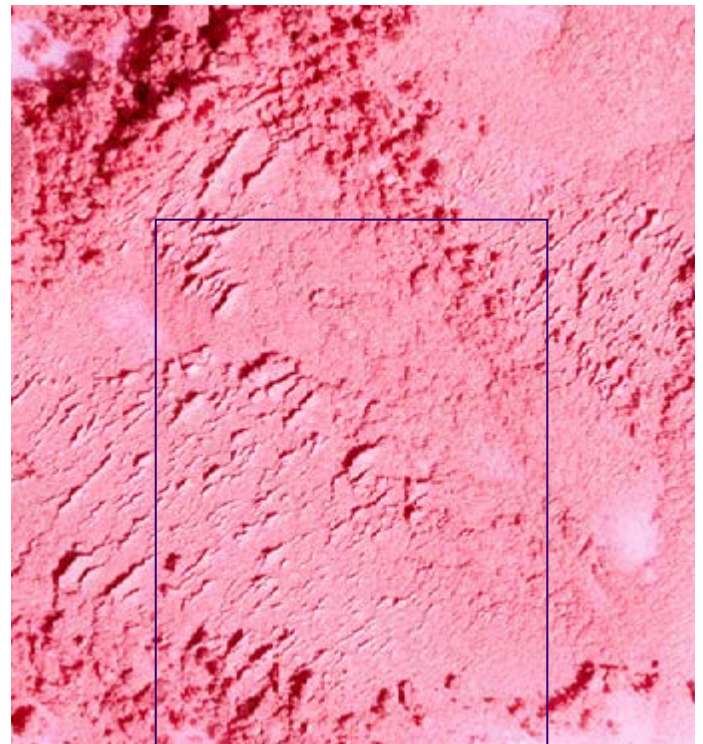
The UK launched its full-cost EPR regime in April 2025. Canada operates province-level EPR programs with active transitions toward full producer responsibility. Other major markets, including Brazil, Mexico, and Australia, have EPR frameworks at various stages of implementation. Personal care brands with significant international distribution should assess obligations in each relevant market.



Considerations for Personal Care Brands

Companies selling into the EU and the U.S. must simultaneously navigate two distinct regulatory frameworks with different fee structures, reporting timelines, covered materials definitions and recyclability standards. Two practical considerations:

- California sets the most demanding domestic standard. Its 2032 recyclability requirement and source reduction provisions exceed those of any other state EPR program.
- Both PPWR and U.S. EPR programs apply eco-modulated fees, reducing costs for packaging that meets recyclability and PCR content criteria.



	EU PPWR	U.S. EPR State Programs
Structure	Single harmonized regulation across 27 member states	Seven separate state laws; no federal standard
Effective date	Aug. 12, 2026 (full application)	Fees active in CO, OR; others phased through 2030
Who must comply	Manufacturers and importers placing packaging on EU market	"Obligated producers" – brand owners, manufacturers, importers selling into each state
Fee structure	Eco-modulated; tied to recyclability grade	Eco-modulated; based on covered materials sold into each state
Recyclability mandate	100% recyclable by 2030	California: 100% recyclable or compostable by 2032; other states vary
PCR content	Mandatory minimums for plastic packaging	Incentivized through eco-modulation for plastic packaging; not universally mandated
Source reduction	Required; packaging must minimize weight and volume	Required in California and Minnesota; emerging in other states
Single-use restrictions	Specific formats banned by 2030, including hotel cosmetic amenities	California most restrictive; others vary
Reporting complexity	Standardized across EU; guidance published March 2026	California: extensive reporting categories; varies by state
Legal status	In force; implementation guidance active	Active legal challenges in Oregon; California SB 343 lawsuit filed March 2026

Primary Sources

[EU Packaging and Packaging Waste Regulation \(PPWR\)](#), [California SB 54 \(Plastic Pollution Prevention and Packaging Producer Responsibility Act\)](#), [CalRecycle SB 54 implementation](#), [California SB 343 \(truth in labeling\)](#), [CalRecycle SB 343 implementation](#), [Oregon SB 582 \(Plastic Pollution and Recycling Modernization Act\)](#), [Circular Action Alliance](#), [Colorado HB 22-1355 \(Producer Responsibility Program for Statewide Recycling Act\)](#), [Maine LD 1541 \(Stewardship Program for Packaging\)](#), [Minnesota Packaging Waste and Cost Reduction Act \(HF 3577\)](#), [Maryland SB 901 \(Producer Responsibility Plans Act\)](#), [Washington SB 5284 \(Recycling Reform Act\)](#).