

NAPIM Regulatory Update 2026

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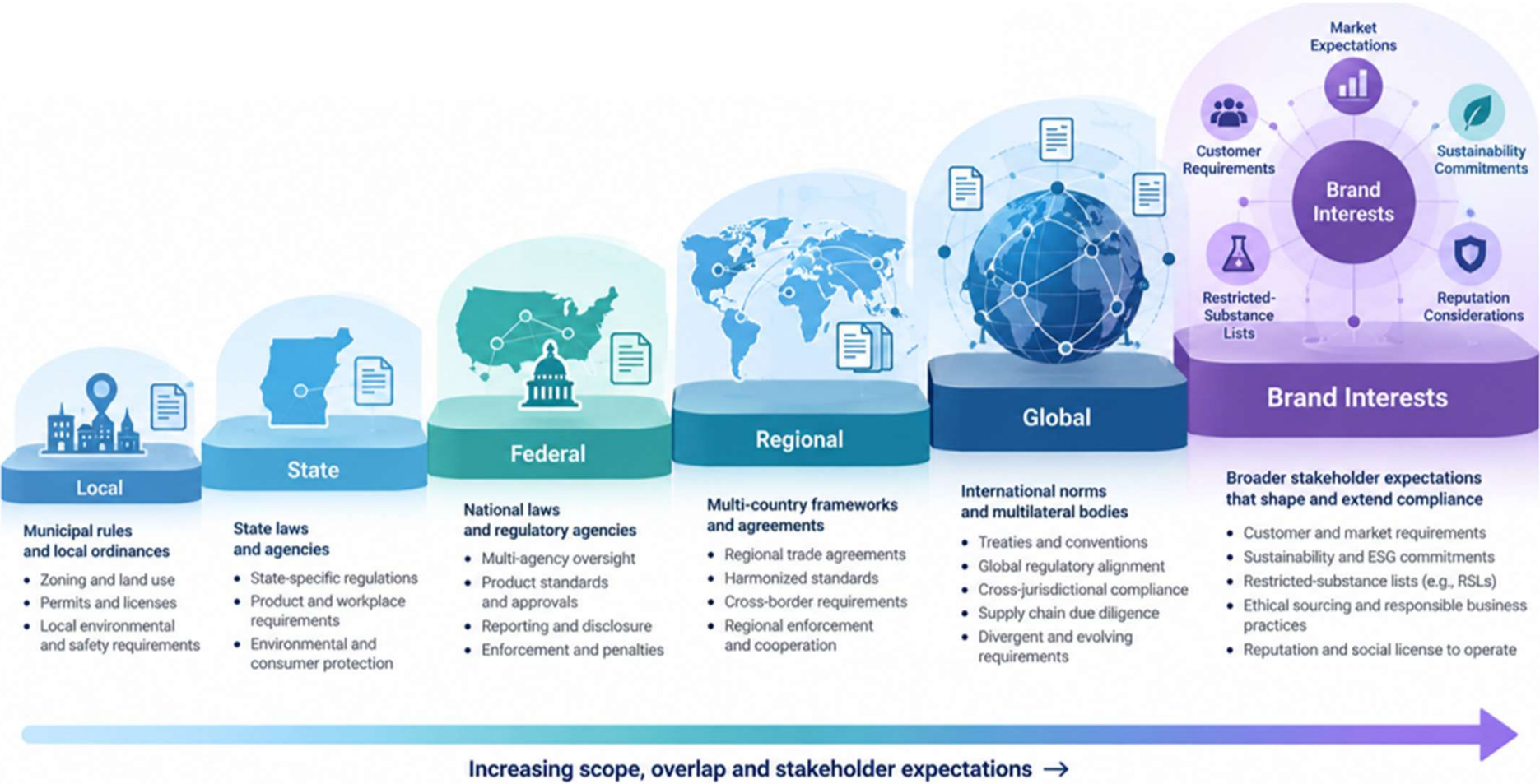
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NAPIM Chair Technical Board

Topics

- Regulatory Landscape
- Tariffs
- OSHA HazCom 2024 Implementation
- FDA GRAS
- TSCA
- Appropriations Bills
- Midterm Elections
- State activities
- EPR
- Sustainability



Regulatory Landscape



Global Regulatory Landscape

Sustainability and chemical regulations are driving ink reformulation across the industry



Food and ingredient regulations impacting food contact packaging



Mineral Oils (MOSH/MOAH) specifications



EU Packaging & Packaging Waste Regulation (PPWR)



GHS Reclassification of CMRs

US Tariffs



Section 122

- 10% uniform surcharge sunset July 2026

Section 301

- 10 or 12.5% on 60 countries

Section 338

- 50% tariff became effective on specifically listed Canadian products.
- HTS 3215.19.90 covers non-solid printing inks (other than black)
- Effective August 22, 2026
- Applies even if ink qualifies for USMCA duty-free

Key 2026 trade measures and potential impact on ink manufacturers



CHINA

Up to 40%

12.5% applies to most non-exempt inks and chemicals.

Existing Section 301 tariffs stack.

Chapter 3215 inks carry additional 25%.

Producing 37.5% in additional tariffs, plus the normal MFN duty (generally 1.8% for printing ink)



EU

10–15%

10% Section 301 duty increases total MFN duty/tariff.

If the normal MFN rate is already 10% or higher, no additional Section 301 duty applies.



CANADA / MEXICO

**Duty-free
Or
50% some HTS codes**

USMCA are exempt from 10% 301 tariff.

However, 50% tariff for Section 338 on some Canadian products (including printing ink HTS 3215.19.90 & others)



MOST OTHER COUNTRIES

12.5%

India, Argentina, Indonesia and Malaysia—are subject to 10% instead.

Countries outside the 60 investigated economies generally remain subject only to normal MFN, FTA and product-specific duties.

US Tariff Impacts – Industry Response



- Diversified sourcing
- Regional supply chains,
- Tariff-adjustment clauses,
- Consolidation across the sector due to larger manufacturers' ability to absorb costs.

Potential Impact Across the Ink Supply Chain



Raw Materials

Higher costs for imported pigments, resins, additives and solvents.



Supply Chain

Greater need for alternative sources and supplier diversification.



Manufacturing

Pressure on cost structure and margin management.



Customers

May lead to formulation changes and pricing considerations.

Key Takeaways for Ink Manufacturers



Tariff rates are HTS code-specific and can vary widely by product and origin.



Key raw materials such as pigments, resins, photoinitiators, additives and solvents may be affected.



May influence sourcing decisions, formulation strategies and supply chain diversification.



Can increase landed costs and impact raw material availability.

OSHA HazCom 2024 Implementation



Requirement	Original Deadline	New Deadline
Manufacturers, importers, & distributors (substances)	Jan 19, 2026	May 19, 2026
Employers – updated workplace labeling, programs, training (substances)	Jul 20, 2026	Nov 20, 2026
Manufacturers – mixtures	Jul 19, 2027	Nov 19, 2027
Employers – programs, training (mixtures)	Jan 19, 2028	May 19, 2028

US OSHA HazCom HCS Update



SDS authoring



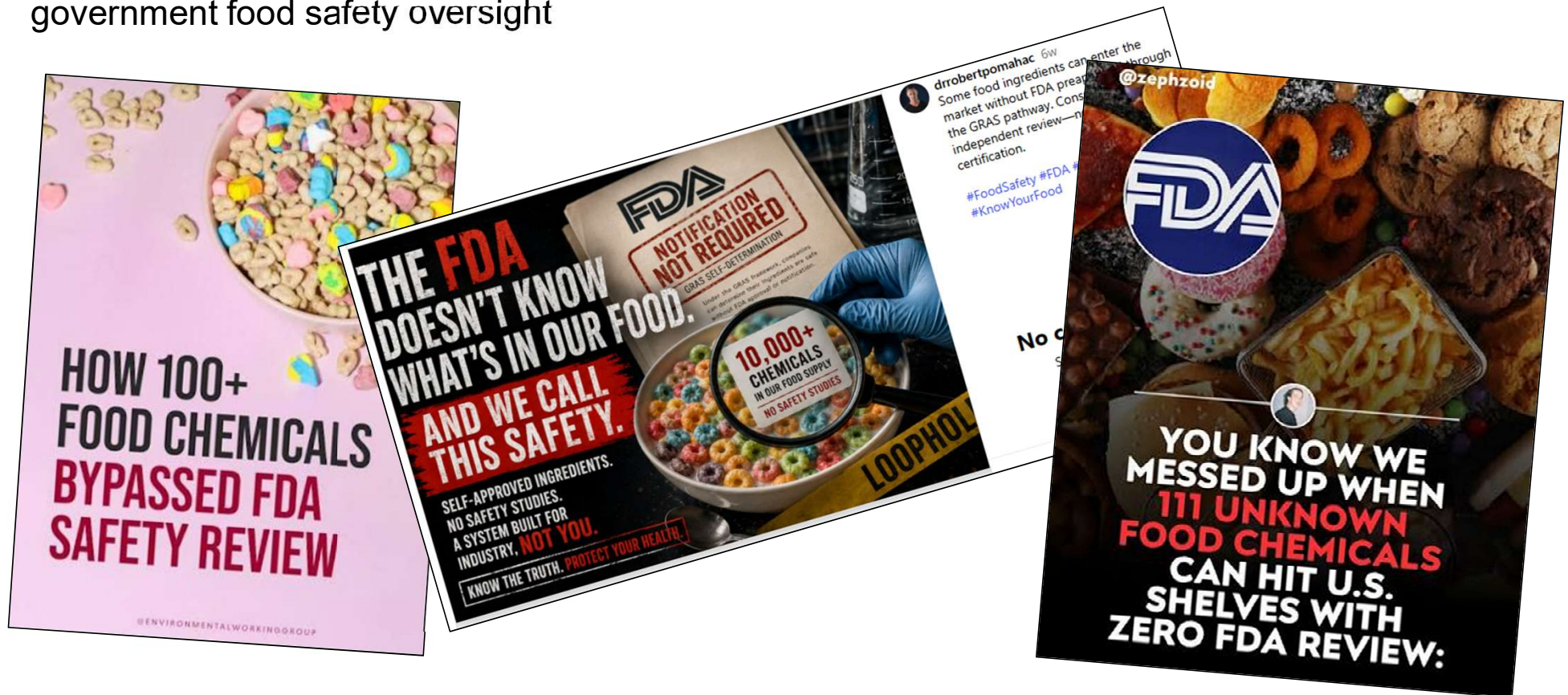
Classifications



Labelling

FDA Proposes Mandatory GRAS Notification Framework

Public criticisms to the GRAS rule create declining public confidence in government food safety oversight



FDA GRAS

Proposed GRAS Rule Takeaways:

- Mandatory FDA notification of GRAS status
- GRAS Notifications to be submitted electronically
- Effective 60 days following final publication
- 18-month compliance timeframe for the Mandatory GRAS Notification Provision
- Time-limited streamlined submission process for substances already marketed based on independent GRAS conclusions before the final rule's effective date
- Keeps 180-day review period for GRAS Notifications (but allows two 90-day extensions)
- Animal food GRAS Notification to align with those for human foods
- FDA would maintain a public inventory of substances subject to mandatory GRAS notification and their intended uses
- Establishes procedures for FDA to determine that an intended use does not qualify as GRAS and may instead require a food-additive petition.
- Safety documentation for scientific basis supporting GRAS conclusions to be shared with FDA

FDA GRAS

Key Actions for Industry:

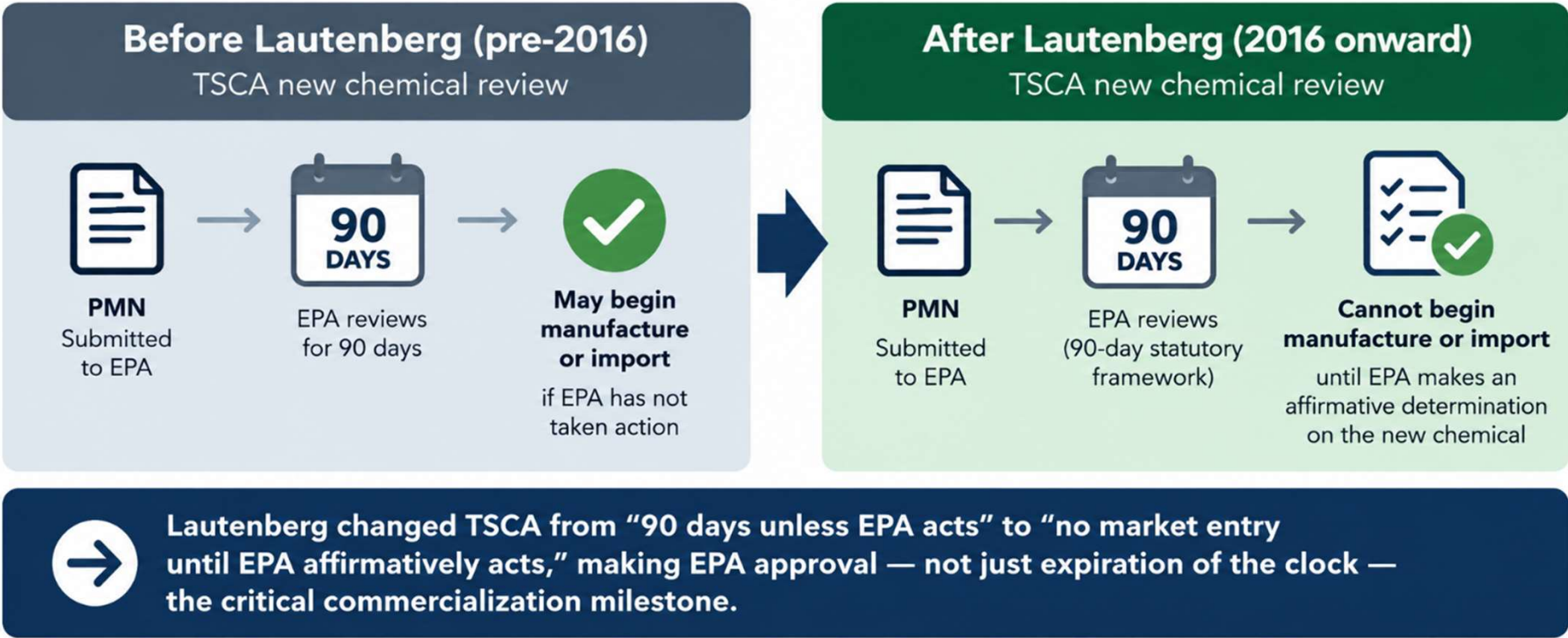
- Inventory existing self-GRAS determinations
- Identify substances/uses that have never been submitted to FDA
- Review supporting toxicology and exposure data to confirm GRAS conclusions
- Identify data gaps
- Update safety assessments or additional documentation to fill gaps
- Monitor and Participate in association actions



TSCA

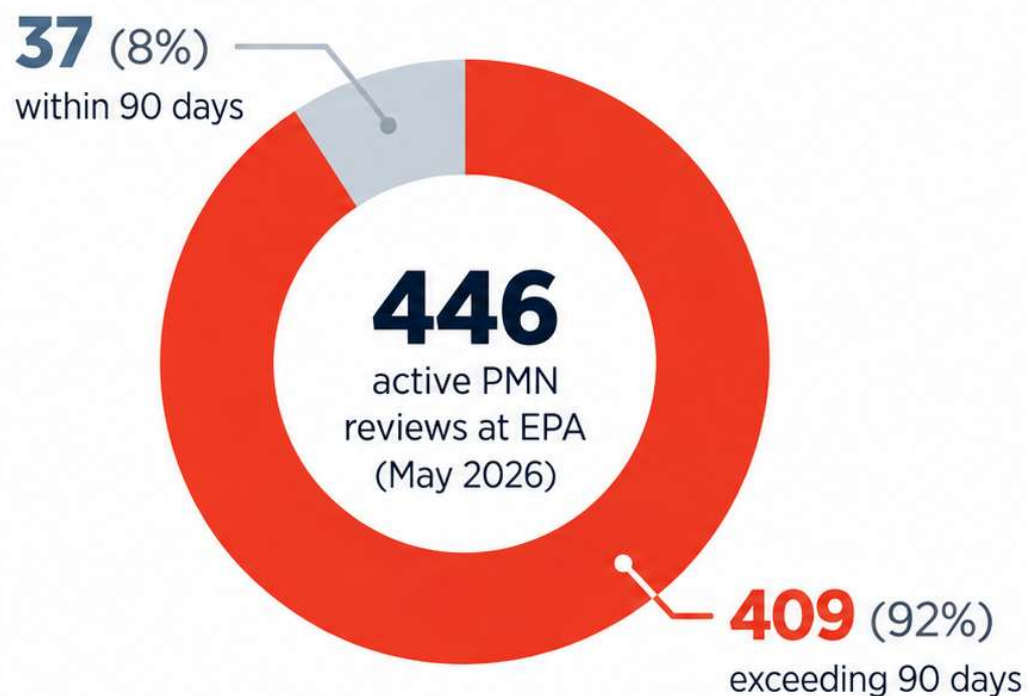


Approvals and Timelines for Innovations



TSCA

Approvals and Timelines for Innovations

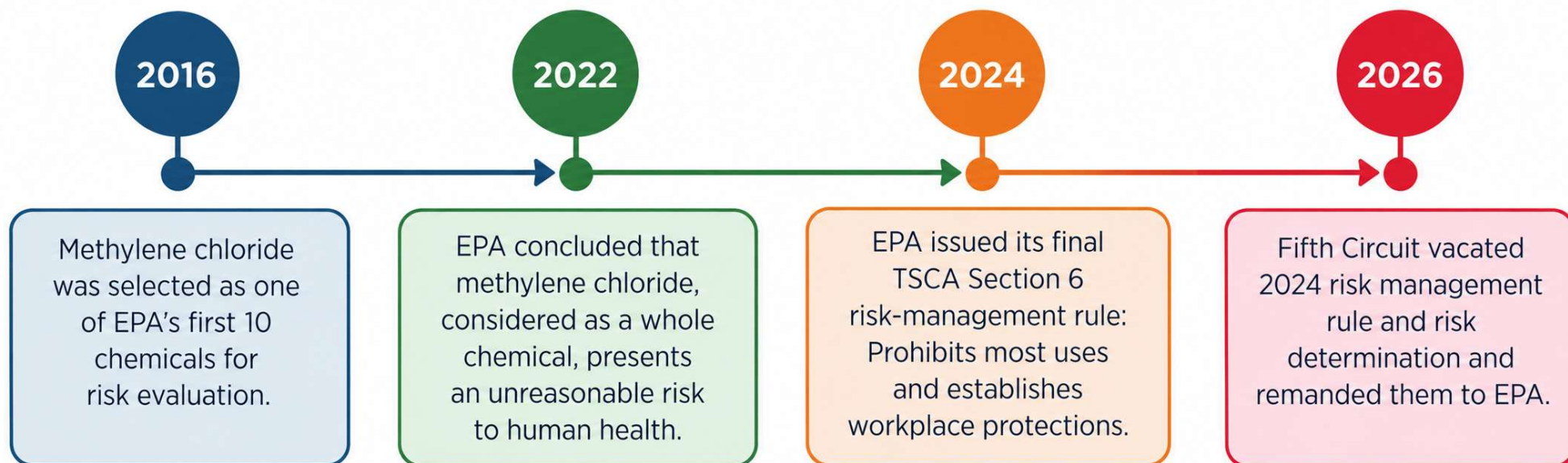


Under TSCA, EPA is required to complete new chemical review within 90 days, but as of May 2026, **92%** of active PMN submissions have exceeded this timeframe.

Source: American Chemistry Council (ACC), TSCA New Chemicals Tracking, May 2026.

TSCA – Risk Management – Methylene Chloride

Existing chemicals also fall under EPA review.



Industry significance: Methylene chloride became an important early test case for TSCA risk management, particularly EPA's treatment of PPE, engineering controls, and the whole-chemical approach.

TSCA – Risk Management – Methylene Chloride



Importance Beyond Methylene Chloride:

Fifth Circuit challenged EPA's evaluation aligned with industry complaints:

- whole-chemical approach,
- Treatment of conditions of use,
- Ignoring PPE and environmental controls,

This ruling may affect how EPA moves forward with TSCA risk evaluations and risk management rules in the future



TSCA – Risk Management



Currently Undergoing Prioritization

Chemical	CAS RN
4-tert-Octylphenol (4-(1,1,3,3-Tetramethylbutyl)-phenol)	140-66-9
Benzene	71-43-2
Ethylbenzene	100-41-4
Naphthalene	91-20-3
Styrene	100-42-5

Currently in risk evaluation

Chemical	CAS RN
4-tert-Octylphenol (4-(1,1,3,3-Tetramethylbutyl)-phenol)	140-66-9
Benzene	71-43-2
Ethylbenzene	100-41-4
Naphthalene	91-20-3
Styrene	100-42-5

2027 Appropriation Bills



Federal government shutdowns can have an outsized impact on the chemical industry dependent on timely federal regulatory approvals. (EPA, OSHA, FDA)

- FY began October 1, 2026 without full-year packages enacted
- US Federal Government is operating under Stopgap funding until Dec 4, 2026 to avoid government shutdown prior to midyear elections
- Full 2027 FY appropriations bills continue to move through Congress
- Republicans face increased pressure ahead of the midterm elections as the majority Congressional party
- 2025 government shut down lasted for a record 42 days



Midterm Elections



2026 Congressional Midterm Elections will be held on **November 3, 2026.**



35 US Senate seats and all 435 US House seats will be on the ballot



Nearly 100 members of Congress are retiring, seeking other offices, or departing

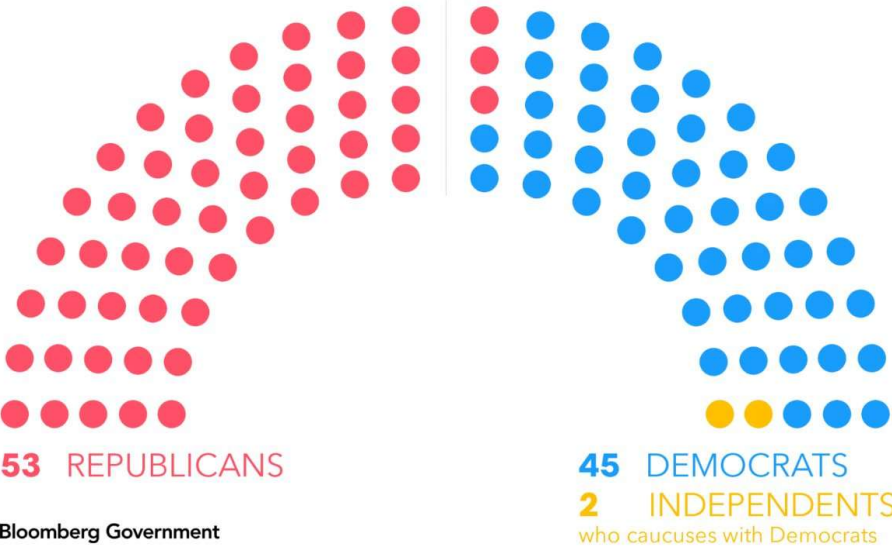


Historically, the party controlling the Executive Branch faces a challenge maintaining congressional majorities in Midterm Elections

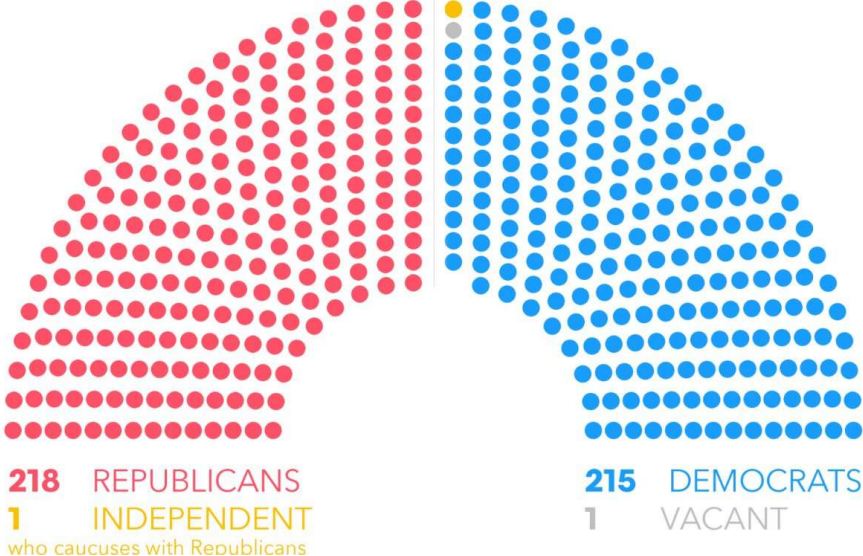
Midterm Elections



Balance of Power in the Senate



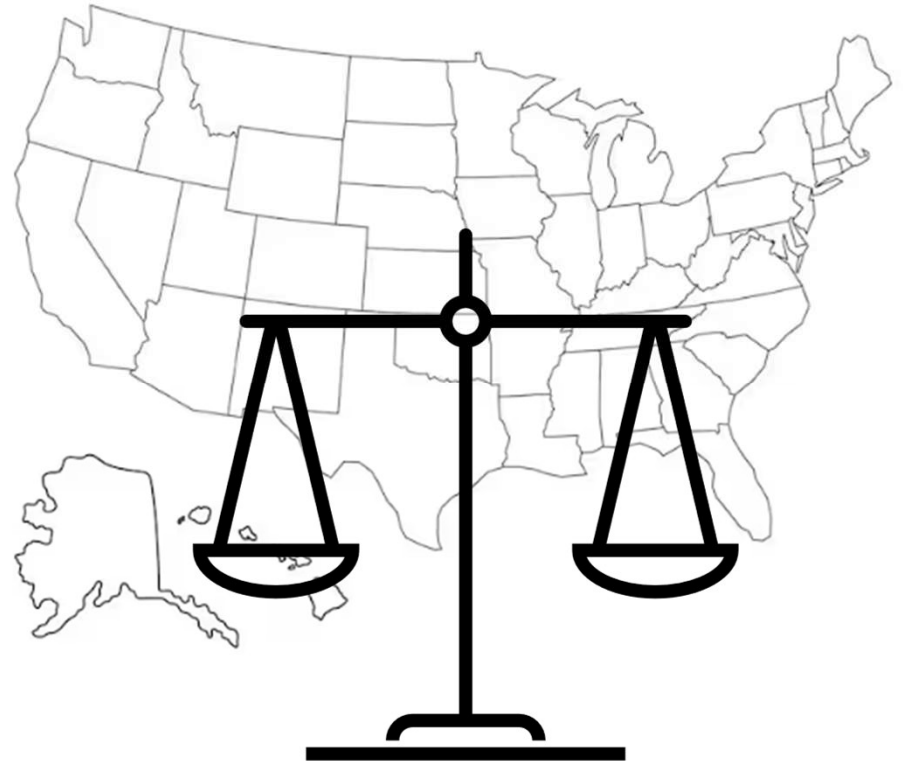
Balance of Power in the House



State Overview

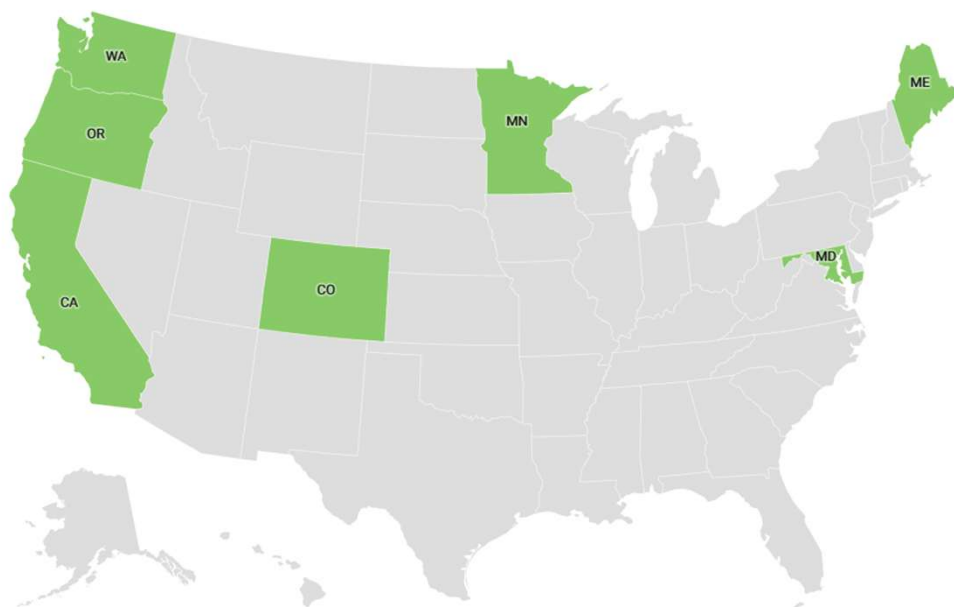


- Active state legislative and regulatory activity continues to influence the printing industry.
- State policy changes can significantly affect operations, compliance, and reimbursement.
- Monitoring developments across the states remains a key priority.



State EPR

Packaging EPR is rapidly becoming a multi-state compliance issue.



Packaging focused EPR:

- California's permanent SB 54 regulations became effective May 1, 2026;
- Oregon's Recycling Modernization Act is already requiring covered producers to register, report and pay fees;
- Maryland's packaging EPR regulations became effective in May 2026 with registration beginning July 1;
- Minnesota is conducting its 2026 needs assessment; and
- Washington began rulemaking for its new Recycling Reform Act. Inadvertent PCB inks continue to be under review.
- Colorado SB54
- Maine S2146

These laws are increasingly driving customer requirements around recyclability, material selection, packaging design and data transparency.

Federal EPR?

Still no US federal packaging EPR program

Congress is considering legislation to create national standards and reduce a patchwork of state requirements.



Recycled Materials Attribution Act (H.R. 7502)

- Creates federal rules for recycled-content claims
- Seeks to reduce conflicting state requirements



PACK Act (H.R. 6832)

- Establishes national standards for recyclable, compostable and reusable packaging claims
- Could preempt different state labeling requirements



EU PPWR



PACKAGING

Review materials and pack design
Qualify recycled content
Build compliance documentation

PRINTING & INKS

Support packaging recyclability
Validate print performance
Provide supporting supplier data

NORTH AMERICAN CUSTOMERS

EU-bound packaging must comply
Global brands may align specifications
Prepare suppliers and validate early

*Some start dates depend on implementing rules; scope and exemptions vary.

EU market requirements can influence customer specifications worldwide.

What can we do?



CALL TO ACTION

Local action is the most effective!

NAPIM Partners:



The
Business
Council

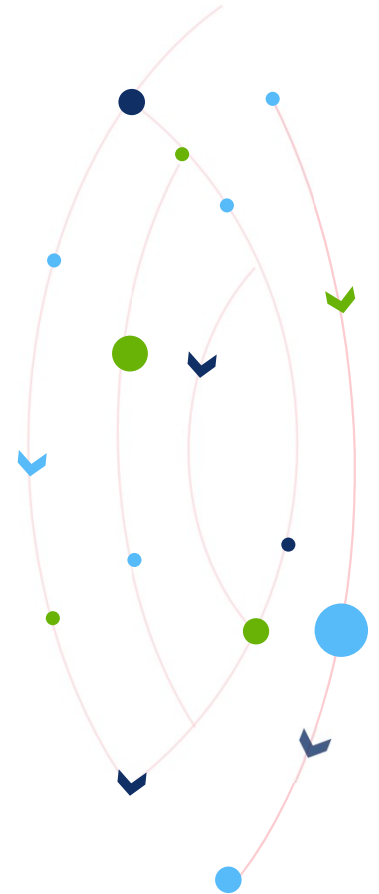


Connecting. Advancing. Leading.





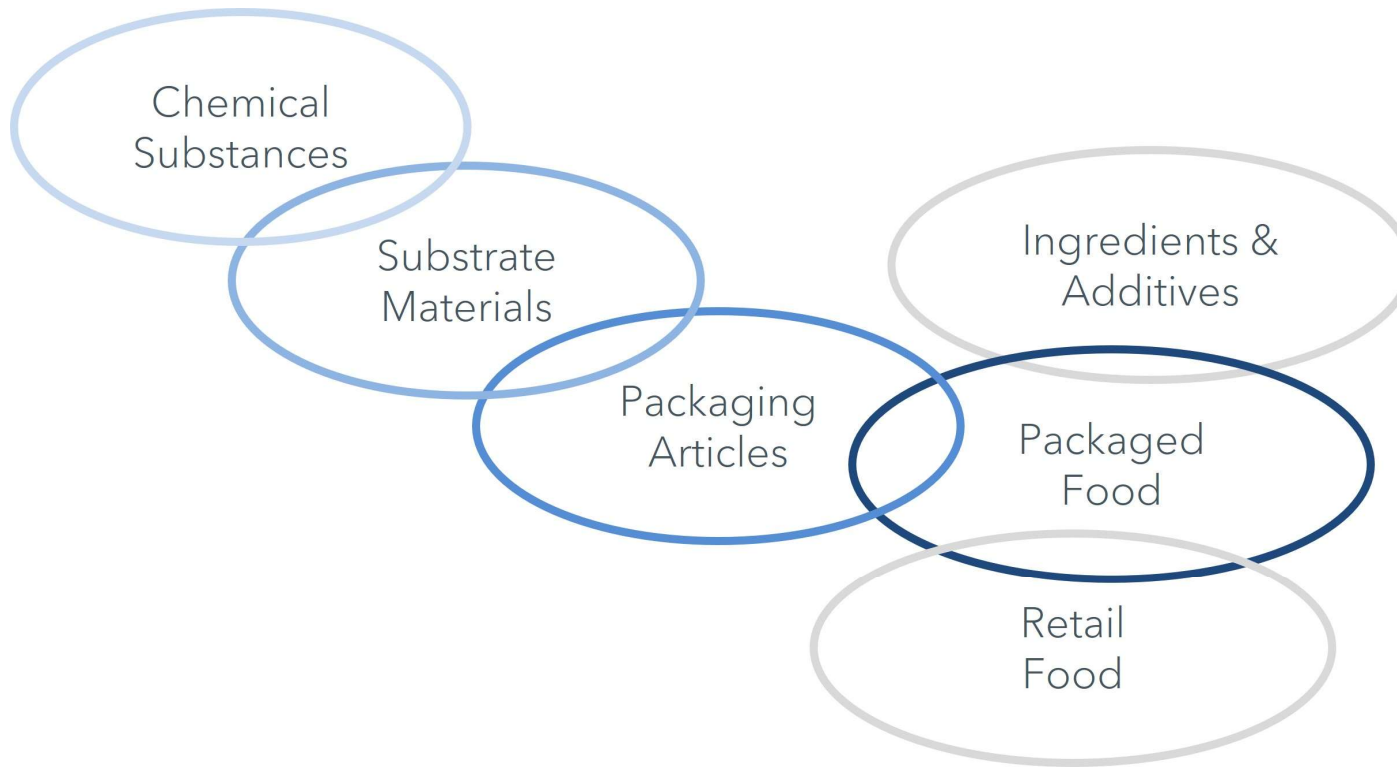
Organizational Overview



The Food Contact Safety Council is an organization comprised of companies and associations equipped to monitor, address and advocate for food contact issues along the entire value chain (upstream and downstream)

**North Star:
Food Contact Safety**

FCSC Includes the Entire Supply Chain



FOOD

Primary focus will be on **food safety** (e.g. risk assessments and consumer exposures) rather than environmental health

CONTACT

Scope will include the entire packaging supply chain (chemicals + material substrates + packaging materials + packaged food) rather than an individual segment.

SAFETY

Our north star is **Food Contact Safety**.

All strategic priorities and imperatives must route back to safety as the core principle.

COUNCIL

This is an umbrella organization powered by member companies and trade associations

FCSC was established on May 1st, 2026

Founding Members



Industry Members



The Food Contact Safety Council advances strong, science-based regulatory and legislative frameworks that ensure the safety of food contact materials across a united supply chain.

by shaping food contact safety policy and industry standards through advocacy and the development of rigorous scientific evidence,
we unite the industry around shared priorities.

Through this work, we strengthen the entire value chain — aligning stakeholders, enhancing compliance, and building trust through consistent, forward-looking frameworks - we enable innovation and protect public health.

Science First

We advocate for risk-based, exposure-driven decision making — not hazard headlines.

Federal Leadership

Food-contact safety belongs at the federal level, not in fragmented state frameworks.

Packaging Matters

Packaging protects food safety, reduces waste, and supports sustainability.

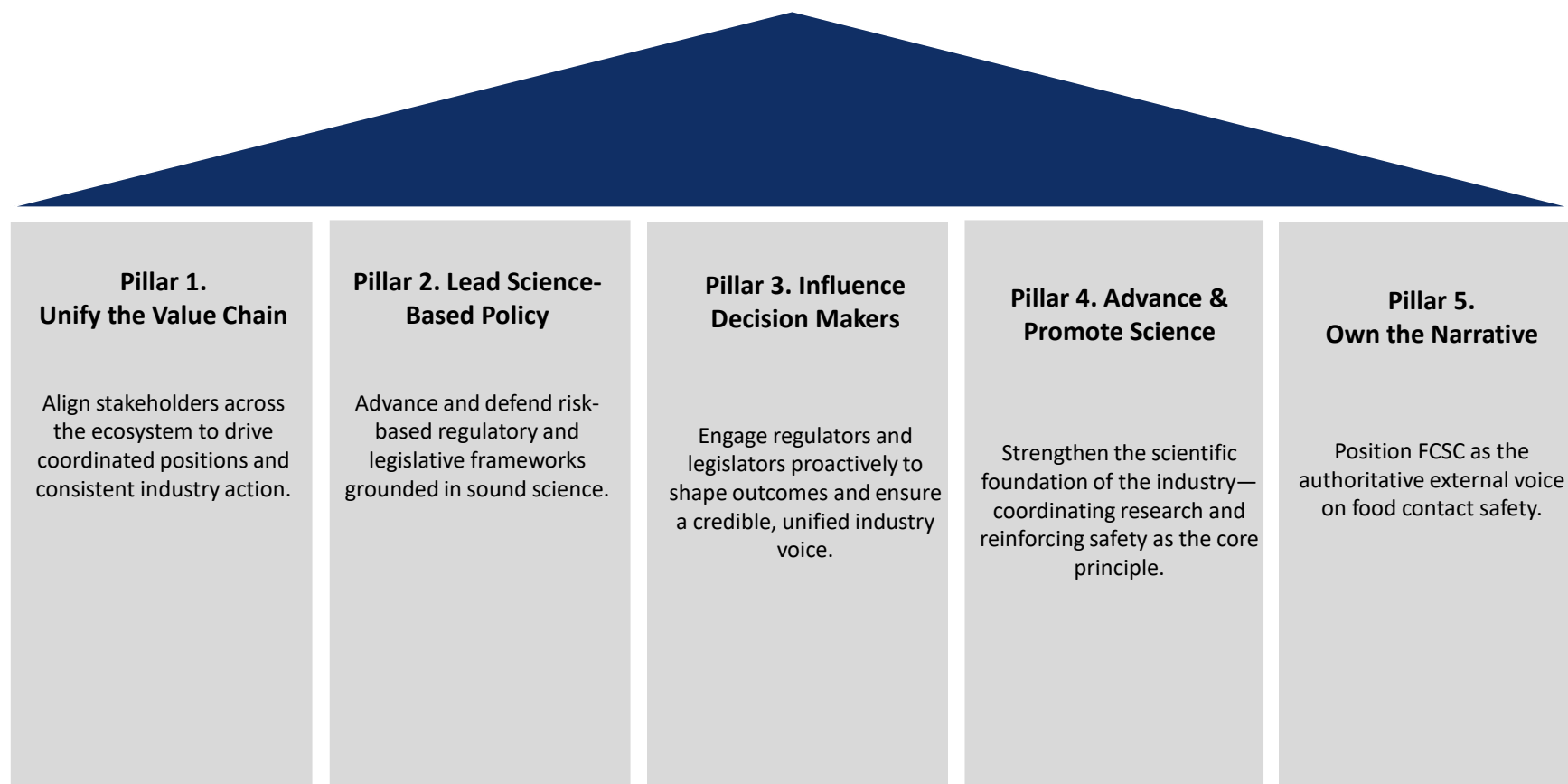
Anticipate, Don't React

We monitor emerging issues globally so members aren't caught flat-footed.

Unified Industry Voice

We align the value chain to speak clearly and credibly.

FCSC Strategic Pillars



2026 Quick Wins | ~95% Complete/In-Progress

INTERNAL

- Identify Committee Chairs
- Kick-off critical working groups week of 5/18:
 - GRAS Taskforce
 - Comm/Mktg Taskforce
 - Regulatory Committee (Prioritize Post-Market)
 - Government Affairs
- Create Internal and External messaging for members
- Continue Membership Outreach & Recruitment
- Develop member resource to track state bills
- Map legislators
- Map state bans (top chemicals)
- Assess FCSC's Role & Objectives on EPR + Safety
- Develop Key Topics Roadmap

EXTERNAL

- 1. Introduce FCSC to Coalitions & Trades**
 - Coalitions: FISC,
 - Associations: FBIA, CBA
- 2. Establish FCSC relationships with Congressional, Regulatory and Administration**
 - OMB re: GRAS
 - FDA (K. Diamantes, M. Hartman)
 - Congressional Leadership
 - Priority Bills (Marshall + Cammack)
- 3. FDA Proposals/RFI's**
 - BHA/BHT | Sign-on to letters + Draft Comments
 - Post-market Review
 - GRAS Proposal
- 4. State Activity**
 - **New York:** Food contact Chapter Amendment (Led by Plastics (mtg on 5/7) + Food Groups (NY Coalition) + Draft veto request NY (leg session ends 6/30)
 - **California Bills:** Align and activate

Pillar 1: Unify the Value Chain Align stakeholders across the ecosystem to drive coordinated positions and consistent industry action.	Pillar 2: Lead Science-Based Policy Advance and defend risk-based regulatory and legislative frameworks grounded in sound science.	Pillar 3: Influence Decision Makers Engage regulators and legislators proactively to shape outcomes and ensure a credible, unified industry voice.	Pillar 4: Advance & Promote Science Strengthen the scientific foundation of the industry through coordinating research and reinforcing safety as the core principle.	Pillar 5: Own the Narrative Position FCSC as the authoritative external voice on food contact safety.
Key Focus Areas: ▶ Continued Member Outreach targeting 3-5 new members ▶ Continue to align with adjacent trade associations (AFIT, CBA) ▶ Finalize Policy & Procedures ▶ Develop Member Tools & Resources ▶ Finalize committee core objectives & framework	Key Focus Areas: ▶ Identify and develop resources on critical positions (GRAS, Microplastics, PFAS) ▶ Establish and reinforce industry positions through Comment letter/RFI's ▶ International: ▶ Establish CODEX Observer Status ▶ Track International Headwinds (PPWR) ▶ Proactively Monitor and assess impact of emerging issues	Key Focus Areas: ▶ Identify Top Policy Priorities ▶ Continue to ensure FCSC is top of mind with critical policy decision makers ▶ HELP ▶ E&C ▶ Continue regular meetings with critical agencies ▶ FDA ▶ EPA ▶ APHIS ▶ Meet with FDA regarding Catalyst	Key Focus Areas: ▶ Identify substances of concern and ensure all data related to safety is leveraged in positions ▶ Scientific Committee to review topics with guidance from Regulation & GA (Microplastics) ▶ Develop white papers / member one-pagers	Key Focus Areas: ▶ Launch organization broadly through robust Strategic Communications Plan. ▶ Define Audience: B2B – Leg, Reg, Industry ▶ Continue to build out website & messaging ▶ Conduct media landscape assessment (potentially move to 2027) ▶ Shape public discourse, counter misinformation, and establish FCSC as the reactive authoritative external voice



What This Means for Food-Contact Substances

New Substances

- GRAS notice, or
- FCN as an alternative
- FDA recommends the FCN route

Substances Already in Use

- Streamlined submission (Subpart F)
- One-year window after effective date
- No underlying data required; public registry

Seven Proposed Exemptions

- “No questions” letters
- Listed/affirmed GRAS substances
- TOR exemptions
- Effective FCNs (named supplier only)



Other Provisions

Threshold of Regulation

- Expanded to direct additives
- New intake threshold: 0.025 $\mu\text{g}/\text{kg}$ bw/day
- Cancer risk stated as 1 in 1 million

Economic Impact

- ~\$89.6M total cost, 10 years
- \$10.5M annualized
- “Significant impact” on small entities
- FCN filings not analyzed

Statutory Authority

- Congress exempted GRAS from premarket review
- Mandatory notice likely to draw objection
- FDA invites alternative proposals

1

Unify the Value Chain

Align stakeholders across the ecosystem to drive coordinated positions and consistent industry action.

3–5 new members

2

Lead Science-Based Policy

Advance and defend risk-based regulatory and legislative frameworks grounded in sound science.

3 policy wins

3

Influence Decision Makers

Engage regulators and legislators proactively to shape outcomes and ensure a credible, unified industry voice.

5 FDA relationships
Quarterly Mtgs with FDA

4

Advance and Apply Science

Strengthen the scientific foundation of the industry through coordinating research and reinforcing safety as the core principle.

2–3 science resources

5

Own the Narrative

Position FCSC as the authoritative external voice on food contact safety.

Rapid response active
Expand Market Awareness

**Preserve Federal
Leadership and National
Uniformity**

**Establish More Efficient
Food Contact Substance
Pathways**

**Advance GRAS
Modernization Without
Disruption**

**Address EPR and Product-
Safety Requirements**

**Protect Proprietary and
Confidential Information**

**Develop a Microplastics
Policy Framework**

**Conduct a Food-Contact
Policy and Science
Landscape Assessment**

**Strengthen
Science-Based
Communications**

Food Contact Safety Council

2026 Dues Schedule

Membership Categories	Founding*/Primary Members	Industry Members	Subscribing Members
A. Base Materials - Chemicals, Resins, Substrates	\$50,000	\$35,000	
B. Formulated Products - Inks, Adhesives, Coatings, etc.	\$25,000	\$15,000	
C. Converters - Rigid/Flexible Packaging	\$25,000	\$15,000	
D. Brands - Packaged Goods, Foodservice and Retailers	\$50,000	\$35,000	
E. Trade Associations	\$15,000	\$10,000	\$3,500
F. Service Providers		\$5,000	\$3,500

Benefits	Founding*/Primary Members	Industry Members	Subscribing Members
Access to Membership Engagement Tool	x	x	x
Briefings on federal and state activities	x	x	x
Educational Resources & Industry Communications	x	x	x
Committee Participations	x	x	x
Policy & Advocacy Engagement	x	x	
Committee Leadership Eligibility **	x	x	
Develop 3-year strategy and KPIs	x		
Guaranteed Board Seat for the First Three Years	x		
Setting of Governance and Structure	x		
Recognition as Founding Members	x		

Once membership is confirmed, an invoice will be sent reflecting the membership category selected.

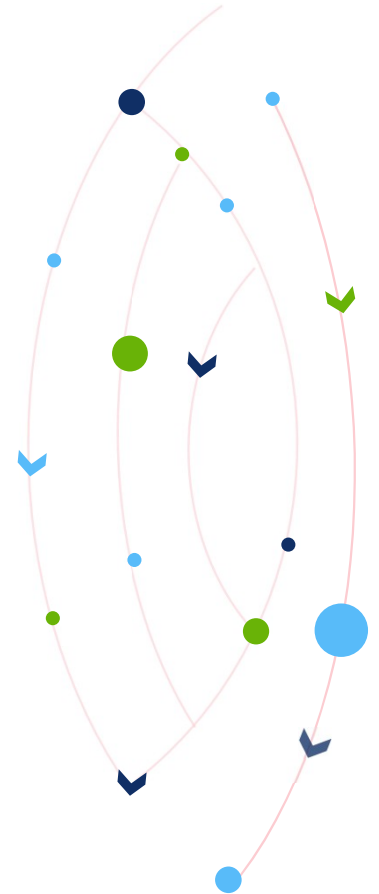
* available only through 2026; logo placement recognition

** excluding Service Providers



Thank You

Together, we advance food contact safety. Together, we make an impact.



1. Distinct Treatment of Food Contact Substances

- Food contact substances are distinct from food ingredients and should be evaluated under regulatory frameworks that reflect their intended uses, exposure levels, migration potential, and risk profiles.

2. Federal Oversight and National Uniformity

- FDA should remain the primary authority responsible for food-contact safety. A single, nationally uniform regulatory framework promotes consistent protections, regulatory certainty, and efficient compliance across the food-contact value chain.

3. Science- and Risk-Based Policy

- Policies governing food contact substances, including for microplastics, should be grounded in sound science, robust research, and risk-based assessment. Regulatory decisions should consider actual exposure and intended use rather than hazard alone.

4. Smart, Flexible Regulatory Solutions

- Regulatory frameworks should be clear, efficient, and sufficiently flexible to foster innovation while protecting public health. Policies should avoid unnecessary disruption, duplication, or unintended consequences.

5. Support for Circularity

- Policies should enable the safe use of circular feedstocks and should not unnecessarily disadvantage recycled or other circular materials. Requirements should address potential risks using science-based assessments appropriate to the material and its intended use.

6. Protection of Proprietary Information

- Food-contact policies and FDA programs should protect confidential commercial and proprietary information while providing the transparency necessary to maintain confidence in regulatory decision-making.

1. Preserve Federal Leadership and National Uniformity

Lead: Government Affairs and Regulatory

- Support FDA leadership and a consistent national framework for the regulation of food contact substances .
- Oppose inconsistent or conflicting state requirements that create a fragmented national regulatory system.
- Monitor and respond to state “MAHA,” toxics-in-packaging, and chemical-restriction legislation.

2. Establish More Efficient Food Contact Substance Pathways

Lead: Regulatory and Government Affairs

- Advocate for a clear, timely, predictable, and appropriately resourced FDA review processes.
- Modernize and streamline the Food Contact Notification pathway.
- Ensure requirements and timelines are proportionate to intended use, migration, dietary exposure, and risk.
- Preserve appropriate distinctions among Food Contact Notifications, GRAS conclusions, Threshold of Regulation (TOR) exemptions, and other lawful pathways.
- Avoid duplicative reviews, protect confidential information, and address barriers to innovation and continued market access.

3. Advance GRAS Modernization Without Disruption

Lead: Regulatory (GRAS Task Force) and Government Affairs

- Ensure reforms recognize the distinct exposure, use, and regulatory considerations applicable to food contact substances.
- Preserve lawful, workable GRAS pathways and protect continued market access for appropriately supported uses.
- Support requirements proportionate to exposure and risk that avoid duplication with the Food Contact Notification framework.
- Protect confidential business information and commercially sensitive supply-chain information.
- Provide workable transitions, adequate FDA resources, and national regulatory consistency.

4. Address EPR and Product-Safety Requirements

Lead: Government Affairs and Regulatory

- Evaluate the interaction between extended producer responsibility programs and food-contact safety requirements.
- Oppose policies that prioritize circularity goals without appropriately considering material safety and regulatory compliance.
- Promote consistent standards for recycled content, contaminants, and food-contact uses.
- Ensure circular feedstocks are not unnecessarily disadvantaged.

5. Protect Proprietary and Confidential Information

Lead: Regulatory and Government Affairs

- Preserve appropriate protections for formulations, manufacturing processes, supply-chain information, and safety data.
- Evaluate disclosure requirements proposed through federal and state legislation.
- Develop policy recommendations that balance regulatory transparency with legitimate commercial protections.

6. Develop a Microplastics Policy Framework

Lead: Scientific & Technical, Regulatory, and Government Affairs

- Promote consistent definitions and validated testing methodologies.
- Identify data gaps related to exposure, migration, and risk.
- Oppose restrictions unsupported by reliable scientific evidence.
- Advance practical solutions that recognize differences among materials, uses, and exposure pathways.

7. Conduct a Food-Contact Policy and Science Landscape Assessment

Lead: Scientific & Technical

- Map federal and state legislative, regulatory, scientific, and litigation trends.
- Identify emerging substances, materials, and policy issues likely to impact members.
- Evaluate research gaps and prioritize opportunities for scientific engagement.
- Use the assessment to guide FCSC's multi-year policy roadmap.

8. Strengthen Science-Based Communications

Lead: Strategic Communications

- Develop consistent messages explaining food-contact safety, exposure, and risk.
- Clearly distinguish food contact substances from food ingredients.
- Translate complex scientific and regulatory issues for policymakers and other stakeholders.
- Respond to inaccurate or unsupported claims regarding packaging, chemicals, and microplastics.