

Germany Glass Packaging Market - Growth, Trends, Covid-19 Impact, and Forecasts (2023 - 2028)

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Report description:

The German Glass Packaging Market is expected to register a CAGR of 8.51% during the forecast period. Glass packaging for food is anticipated to expand due to strong demand from industries including soups and baby food. The beer, cider, and spirits industries are also anticipated to contribute to the glass expansion substantially. Additionally, the personal hygiene industry is expected to contribute the most to the growth of this packaging material. Glass packaging for cosmetics and toiletries is expected to increase due to the skincare industry's high demand. There has been impacting of the Russia-Ukraine war on the overall packaging ecosystem.

Key Highlights

Glass manufacturers have been critical players in Germany's reuse and recycling system. Gerresheimer, for instance, began producing glass with a higher proportion of recycled glass at the Tettau site in Germany. By using recycled glass, it aims to create new high-quality cosmetics packaging. Many prominent players, like Gerresheimer, drive circularity and resource savings daily. The introduction of stringent laws in the country to enhance the quality and integrity of domestically manufactured drugs is driving an increase in the use of glass for pharmaceutical packaging products. Also, there is a demand for sterile medical packaging products from the pharmaceutical industries, which is anticipated to drive the market's growth during the forecast period. Also, the growing number of drugs packaged in the glass medium is driving the demand for glass-based vials and ampoules.

Moreover, all stores in Germany that sell beverages must take them back and return the deposit to the customer - whether or not that person bought that beverage from them. The warranty for plastic bottles is EUR 0.25 (USD 0.256), recognizing the higher environmental impact. The deposit for glass bottles is far lower - between EUR 0.08 (USD 0.082) and EUR 0.15 (USD 0.154) - because they can be reused, which will allow customers to give more of a reward for returning plastic and encourage them to buy products in glass bottles because it's cheaper upfront.

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According to The Federal Association of the German Glass Industry, ten big glass producers in Germany generate around 20% of the whole glass industry revenue. Few big international glassmakers are dominating the market presently and are interested in producing glass bottles.

Further, Coca-Cola, Germany, shifted from PET bottles back to glass bottles; therefore, it needs enormous amounts of glass bottles. The company has invested EUR 50 million (USD 51.29 million) in two new glass production lines in Mannheim and Luneburg. This pressure from the soft drinks industry further affects the supply of glass bottles in the liquor segment.

The country's expanding disposable income and incorporation into premium packaging are the main drivers of the glass packaging industry. Additionally, the government adopted increased glass packaging due to the mandated trash sorting laws and an incredibly effective deposit refund program that has considerably improved garbage management and raised recycling rates. However, shifts in the cost of raw materials and the fierce competition from other packaging materials may reduce the market's development pace. The pandemic's effects on the supply chain, the sensitivity of glass materials, and a rise in operational expenses will further hinder the market growth.

With the outbreak of COVID-19, the country witnessed significant demand for pharmaceutical glass packaging from the government, which has increased the need for vaccines, especially for vials, bottles, and ampoules, surging since research began to find a vaccine against COVID-19.

Germany Glass Packaging Market Trends

Higher Disposable Income and Integration in Premium Personal Care Packaging

The demand for efficient packaging increased significantly due to robust sales of various customized beauty products.

Furthermore, the rising consumer awareness regarding personal grooming is driving the need for cosmetic products, which, in turn, is driving the glass packaging market in the country.

Face serums and oils have witnessed demand over the past five years, as they offer hydration, moisturization, anti-aging, blemish-clearing benefits, and skin repair. These premium products have been witnessing demand among the aging population. Their increase in demand has increased the growth of dropper and push pump bottles in the country.

Glassmakers in the country are also investing in new technology to quickly swap colors and molds to persuade craft brewers and small brands to break from the long production runs that have dominated the industry.

Among the glass packaging trends in the beauty and fragrance industry is the uptick in disruptive designs, embodied by innovative shapes featured in the outer or inner molded glass. For instance, Verescence manufactured the sophisticated and complex 100 ml bottle for Illuminare by Vince Camuto (Parlux Group) using its patented SCULPT'in technology. The glassworks from Murano inspired the innovative design of the bottle.

Further, the government agency is assisting Gerresheimer AG in Lohr am Main, Germany, with the implementation of a new process for producing high-quality primary glass packaging for the pharmaceutical and cosmetics industries to make glass production sustainable and environmentally friendly. In December 2021, the Bavarian glass industry will benefit from a project supported by around EUR 9.9 million (USD 10.15 million) from the Federal Environment Ministry of Germany.

Furthermore, according to ITC, in 2021, the exports of essential oils and resinoids, perfumery, and cosmetic or toilet preparations were valued at around USD 11.94 billion, a 15.6% rise in exports from the previous year, 2020, which was recorded about USD 10.32 billion. The significant rise in exports may create increased opportunities for vendors across the country in considerable glass production over the forecast period.

Pharmaceutical Sector Expected to Witness Significant Growth

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Vendors have been supplying vials for more than 100 coronavirus vaccine trials worldwide. For instance, Schott AG introduced vials made of Borosilicate glass that can withstand temperatures from -80 to 500 degrees Celsius for the Pfizer/BioNTech vaccine as the temperature required to store the vaccine is -70 degrees centigrade. Furthermore, Schott AG aims to produce two billion glass vials for COVID-19 vaccine doses by the end of 2021.

Furthermore, Germany has been adversely hit by the spread of COVID-19. For instance, according to WHO, the number of confirmed COVID-19 cases since January 2020 in Germany is 3,473,503, with 84,126 deaths. Also, according to the Robert Koch Institute, the country was struck by a third pandemic wave, which increases the need for vaccines. The demand for vials and ampoules has been surging since the research for a vaccine against COVID-19 began.

Also, according to WHO, in May 2021, a total of 30,631,299 COVID-19 vaccine doses have been administered in Germany, and it is expected to rise further owing to the change in decisions made by 16 regional health ministers of the country to start initiating AstraZeneca's vaccine doses to age group 12 to 18 years from August 2021. Such initiatives increase the demand for glass packaging in the country.

Furthermore, according to ITC, in 2021, the imports of pharmaceutical products were valued at around USD 79.26 billion, a 20.82% increase in the imports from the previous year, 2020, which recorded USD 65.6 billion. The significant rise in imports represents the demand for pharmaceutical products, which may create opportunities for various pharmaceutical glass packaging product investments in the country.

Bormioli Pharma plans to double its production capacity by September 2023 and install new production lines by investing in its Bad Konigshofen plant in Germany. The company also plans to upgrade one of its San Vito al Tagliamento furnaces by 2023, further supporting its growth goals in the glass vial manufacturing industry.

Germany Glass Packaging Market Competitor Analysis

The German Glass Packaging Market is moderately competitive, with a considerable number of regional and global players. However, the properties of glass and its benefits to beverages, cosmetics, and other industries are leading to the increased adoption of glass bottles, containers, vials, and ampoules. Players in the market adopt strategies such as product innovation, partnerships, mergers, and acquisitions to increase their market share and further recyclability driving the market.

September 2022: Gerresheimer AG and Stevanato Group S.p.A., a global provider of drug containment, drug delivery, and diagnostic solutions to the pharmaceutical, biotechnology, and life sciences industries, announced that they have jointly developed a high-end Ready-To-Use (RTU) solution platform with an initial focus on vials, based on Stevanato Group's market-leading EZ-fill technology. Customers are expected to benefit from increased efficiency, higher quality standards, quicker time to market, lower total cost of ownership (TCO), and reduced supply chain risk as a result of this partnership.

April 2022: Wiegand-Glas started a new furnace in Germany's Schleusingen facility. The Wiegand-Glas management decided to start the second furnace at the new glass factory in Thuringia despite the energy market's severely unpredictable supply and pricing conditions.

Additional Benefits:

The market estimate (ME) sheet in Excel format
3 months of analyst support

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