

Netherlands Container Glass - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2025 - 2030)

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Report description:

The Netherlands Container Glass Market size in terms of shipment volume is expected to grow from 0.92 million tonnes in 2025 to 1.00 million tonnes by 2030, at a CAGR of 1.82% during the forecast period (2025-2030).

Key Highlights

- Consumers increasingly prefer sustainable packaging solutions, such as container glass products. The Dutch government actively supports recycling and circular economy initiatives, and policies prioritizing waste reduction and recycling bolster the container glass market.
- The Netherlands promotes circularity within the packaging industry, with a high percentage of glass packaging recycled and reused. The country's focus on reducing waste and maximizing the reuse of materials ensures a steady supply of cullet (recycled glass), which is cost-effective and energy-efficient for glass production. This strengthens the circular economy and provides a competitive advantage for the container glass market.
- Alcoholic drinks are predominantly deployed in glass containers, as glass does not react with the chemicals present in drinks. Therefore, it preserves the aroma, strength, and flavor of these beverages, making them a good option for packaging. Due to this, most of the beer volume is transported in glass bottles. This trend is expected to continue over the forecasted period.
- Glass packaging is one of the sustainable options due to its recyclability and reusability. As the Netherlands continues to exceed recycling targets, there will be a growing preference among both consumers and businesses for glass packaging, especially for industries like food and beverages. This increased demand for sustainable packaging will likely spur growth in the container glass market.
- According to Verpact, a Dutch organization promoting packaging industry circularity, 88% of all packaging released on the market in 2023 was recycled or reused. This exceeds the Dutch legal target of 72% and the European target of 65% (set for 2025). In 2022, 90% of glass packaging in the Netherlands achieved circularity, surpassing the legal target of 86%.

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- The availability of substitutes for container glass is restricting the market's growth. Plastics and metals have been replacing container glass in several applications across different industry verticals. Even though the fight against plastics has risen, plastic packaging demand has not slowed down due to its high penetration.

Netherlands Container Glass Market Trends

Pharmaceutical Industry to Create Demand During Forecast Period

- Healthcare and medical spending in the country have increased over the past few years, indicating potential for new medicine development, infrastructure expansion, and market entry opportunities. For instance, in April 2024, Ardena, a prominent Contract Development and Manufacturing Organization (CDMO) focused on advancing molecules to clinical stages, secured Good Manufacturing Practice (GMP) approval from the Dutch Healthcare Authority for its newly established analytical laboratories within its expanded nanomedicine facility. Such collaborations elevate the need for container glass in the sector.
- The growth in pharmaceutical product exports and the rise of pharmaceutical start-ups focused on drug discovery and development are expected to drive demand for container glass. As reported by the Pharmaceuticals Export Promotion Council of India, the Netherlands stands out among its Eurozone counterparts by exporting more pharmaceutical products than it imports, leading to a favorable trade balance.
- The pharmaceutical industry requires glass containers for various product types, including syrups, vaccines, and injectable drugs. Glass provides a non-permeable barrier that helps protect sensitive medicines from contamination and maintains their efficacy, which is crucial for patient safety.
- The EU and the Netherlands prioritize sustainable packaging, including using recyclable glass in the pharmaceutical industry. Increased pharmacy revenues encourage pharmaceutical companies to invest in sustainable packaging solutions, boosting demand for container glass.
- According to the Pharmaceutical Key Figures Foundation (SFK Select), pharmacies' average tariff revenues increased from USD 714,290 in 2019 to USD 779,220 in 2023. Pharmacies generating higher revenues could indicate a growing demand for pharmaceutical products. This demand might lead to increased production, including for glass containers used in packaging medicines like syrups, tablets, or other pharmaceuticals.

Increasing Demand from the Food and Beverage Sector

- Beverages hold a significant market share, with plastic bans imposed. Constantly shifting consumer trends are the primary factors that create demand for alcoholic and non-alcoholic drinks. In the Netherlands, more than half of the population consumes alcohol, resulting in a growth in the number of liquor shops in the country.
- The Netherlands is implementing a 'sugar tax' in stages. As an initial measure, the government increased the existing levy on non-alcoholic beverages (excluding dairy, soy drinks, and water) to EUR 0.26 (USD 0.29) per liter, effective January 1, 2024.
- With the tax excluding water, dairy, and soy drinks, demand may shift toward these beverages. These products are often packaged in glass containers due to their perceived premium quality, safety, and environmental benefits. This shift could increase demand for glass containers as producers cater to health-conscious consumers opting for beverages outside the tax's scope.
- The food market's growth also reflects a rise in online grocery and meal kit services. Due to their durability and premium feel, Glass containers will likely be used more frequently in e-commerce food packaging. This would drive additional demand for glass packaging solutions as online sales of food products continue to increase.
- Health-conscious consumers favor glass packaging for food and beverages because it does not leach harmful chemicals, a concern with some plastics. Manufacturers are increasingly opting for glass due to its superior ability to preserve product quality.

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According to The FoodService Institute Netherlands, the total turnover of the food market amounted to approximately USD 61 billion in 2020. By 2025, the forecast food market value will be USD 74.75 billion.

- As the food market grows, the demand for packaged food products will rise, including ready-to-eat meals, sauces, and preserved foods. Glass containers are widely used in packaging food items because of their superior safety, preservation qualities, and premium image. This growth in food product consumption will likely lead to increased demand for glass packaging in the food sector.

Netherlands Container Glass Industry Overview

The Netherlands container glass market is consolidated and consists of several major players such as Ardagh Group S.A., O-I Glass, Inc., Berlin Packaging Italy S.p.A., Miron Violetglass B.V., and others. A few of the major players are currently dominating the market in terms of market share. The players with a noticeable share in the market are concentrating on expanding their reach with strategic actions such as mergers & acquisitions, partnerships, and product innovation.

Additional Benefits:

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

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