

North America Glass Packaging - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2025 - 2030)

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Report description:

The North America Glass Packaging Market is expected to register a CAGR of 3.51% during the forecast period.

Key Highlights

- Alcoholic beverages dominated the glass bottles segment in the United States. A high percentage of distilled spirits and wines are packaged using glass containers, while in the beer segment, the percentage of glass containers has decreased significantly. On the other hand, in the non-alcoholic segment, glass holds a tiny percentage and is used in CSDs, milk, and newer ready-to-drink beverages.
- In 2020, 82% of all beer was domestically produced, and 18% was imported from more than 100 different countries around the world (source: U.S. TTB and U.S. Commerce Department, 2021). The alcohol beverage marketplace and the three-tier system have evolved rapidly over the years. Since 2012, over 2,300 alcohol beverage laws have been passed around the country (Source: NBWA Industry Affairs, 2021). Such instances address the major adoption of glass packaging.
- Glass packaging has a significant share in the overall alcoholic beverage market, and hence, with the ongoing increase in demand for alcoholic beverages, the market for glass bottles is expected to increase in the forecast period. In November 2020, Hybrid packaging supplier Berlin Packaging expanded its Canadian presence with the acquisition of packaging supplier Consolidated Bottle. The combined businesses are expected to offer even more packaging solutions and value-added services to their customers, thereby catering to the growing demand for glass bottles in the country.
- The consumer drinks about 50% more than the worldwide average, and about 78% of Canadian adults report having consumed alcohol in the past year. Men drink more than women, and young adults are more likely to be past-year drinkers than older adults. The total volume of alcohol sold increased by 0.2% to 3,116 million liters in 2019/2020, which is equivalent to 9.5 standard drinks per week per person over the legal drinking age in Canada as per the data from Statistics Canada.

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North America Glass Packaging Market Trends

Alcoholic Beverages Expected to Witness Significant Market Share

- According to Brewer's Associations, in 2020, the percentage of package market for US craft beer packaging indicated that aluminum could take 81% share whereas glass packaging took 19%.
- Smaller-sized bottles, such as those of 7-12 ounces, compose more than 90% of beer volume in glass bottles and continue to gain a share of bottled beer volume. Large-format bottles have lost their share in recent years. A few years ago, many off-premise retailers like grocery and liquor stores greatly expanded their space dedicated to large bottles such as 22 ounce or 750 milliliters. However, retailers are increasingly reallocating space to faster-moving packages.
- Wine glass packaging manufacturers are innovating their offerings keeping in pace with the latest trends. For instance, in September 2020, Ardagh Group, Glass, North America, a business division of Ardagh Group and the domestic manufacturer of glass bottles for the US spirits market, confirmed a long-term supply agreement with Heaven Hill Brands, the independent, family-owned, and operated distilled spirits supplier, to manufacture its premium spirits bottles in the United States.
- One of the main factors driving the growth of the market is beer consumption in the country. According to Beer Canada, the total beer sales accounted for 21.12 million hectoliters in 2020. However, the sale has fallen as compared to the year 2019. From 2019 to 2020, sales of canned beers grew by 12.3 %, while bottled beer sales decreased by 15.1 % in Canada. This challenged the market growth during a COVID-19 pandemic.
- Moreover, wine sales rose 5.2% to CAD 7.8 billion in FY 2019/2020, which is the largest increase in eight years. While beer was the alcoholic beverage of choice across much of Canada last year, wine claimed the top spot in Quebec (44.0% of total sales) and British Columbia (34.3%). However, residents of Saskatchewan (15.2%) were least likely to buy wine (source: Statistics Canada).

Vials Expected to Witness Significant Market Share

- The US Drug Regulator gave clearance to various companies to speed up COVID-19 vaccine output with bigger vials. The US Food and Drug Administration (FDA) also authorized vaccinators to extract a maximum of 11 doses from the current vials. Further, In April 2021, the US drug regulator gave Moderna Inc. the clearance to speed up the output of its COVID-19 vaccine by letting it fill a single vial with up to 15 doses.
- In addition, In June 2020, the US government's Biomedical Advanced Research and Development Authority (BARDA) awarded USD 204 million to Corning to expand its domestic manufacturing capacity for glass vials for COVID-19 vaccines.
- Similarly, In June 2020, SiO2 received a contract worth USD 143 million from the US government to scale up its manufacturing capacity to 400 million doses. The company is expected to provide 120 million vials for domestic priorities and 1 billion vials by April 2021. The company also recently announced a USD 163 million expansion of its manufacturing plant in Auburn, Alabama.
- The Government of Canada invested around USD 126 million to design, construct, commission, and qualify a new biomanufacturing facility adjacent to its Royalmount site in Montreal. The new biomanufacturing facility, called the Biologics Manufacturing Centre, will support the manufacturing of vaccines and other biologics. This is expected to boost the demand for vials in the region.

North America Glass Packaging Industry Overview

The North America Glass Packaging is moderately consolidated, with a considerable number of regional and global players. The innovation drives the market in the product offerings and increasing investments in beverages.

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- October 2021: Owens-Illinois Glass Inc. and Kronos AG of Germany signed a strategic collaboration to design glass through collaborative innovation for the expanding glass market. The focus areas of the agreement would include improvements in glass filling and the speed and efficiency of packaging lines, development of innovative and sustainable glass systems, enhanced agility and flexibility of responding to market trends, and advancements in digital solutions, such as direct-to-glass digital printing technology.
- February 2021 - Ardagh Group launched Absolut's latest limited-edition vodka bottle, 'Absolut Movement,' to inspire people in celebration of inclusivity. The frosted blue glass bottle features an upward spiral design of 16 swirls, symbolic of the never-ending cycle of change. The upward flow of the swirling spiral indicates social growth.

Additional Benefits:

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

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