

Europe Glass Packaging - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2024 - 2029)

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Abstracts

The Europe Glass Packaging Market size is estimated at USD 21.75 billion in 2024, and is expected to reach USD 25.47 billion by 2029, growing at a CAGR of 3.21% during the forecast period (2024-2029).

Key Highlights

The European glass industry offers glass packaging products for food and beverage, cosmetics, pharmacy, and perfumery industries. The compatibility of glass as a packaging material is a significant factor propelling the market's growth. Inclination toward using environment-friendly packaging material is another driver for the glass packaging market.

According to European Container Glass Federations (FEVE), Europe has 162 manufacturing plants, and container glass is an essential contributor to the European economy and provides employment to about 50,000 people while creating many job opportunities along the total supply chain.

Increasing consumer demand for safe and healthier packaging is helping glass packaging grow in different categories. Innovative technologies for embossing, shaping, and adding artistic finishes to glass make glass packaging more desirable among end users. Furthermore, factors such as the increasing demand for eco-friendly products and the rising demand from the food and beverage market are stimulating the market's growth.

The new rules for sustainability and recyclability in the region are also prominent factors

pushing the growth of glass packaging. The European Union's Packaging and Packaging Waste Regulation (PPWR) proposals outline that each EU Member State could be required to reduce its packaging waste per capita by as much as 5% by 2030, 10% by 2035, and 15% by 2040, which is further driving the demand for recycled glass.

However, the market's growth rate may reduce due to fluctuations in raw material prices and intense competition from other packaging materials. Furthermore, challenges in the glass packaging market arise from the high energy consumption of furnaces used in glass production, impacting environmental sustainability and production costs.

Glass continues to be the reference packaging material for leading alcoholic beverages such as wines, spirits, and beer. It is gaining a prominent share in the food, water, and dairy industries. This is due to new consumption trends for local, organic, and natural food, the positive image of glass packaging, and strong consumer trust in glass as the preferred packaging for environmental, health, and taste preservation reasons.

Europe Glass Packaging Market Trends

Beverages Segment to Hold a Significant Share

The European beverage market is set to experience strong growth and hold a significant market share globally. As the demand for more sustainable and convenient beverage packaging rises, industry experts expect the European beverage market to expand.

Continuous improvements to Europe's packaging production and manufacturing processes make the industry even more environment-friendly. Packaging companies are increasingly concentrating on following sustainable practices by manufacturing products from recycled materials, which use less energy and water while cutting down on carbon emissions.

Creating innovative, lightweight products with appealing designs and brilliant color schemes at lower production costs has continued to be a key growth facilitator. Prominent beverage companies are also raising the adoption of glass packaging, which adds to the beverage segment's share in Europe.

For instance, in September 2023, Coca-Cola HBC established a new, high-speed returnable glass bottling line (RGB) at Edelstal plant in Austria. An investment of EUR 12 million (USD 12.99 million) from Coca-Cola HBC was supported by a grant of EUR 4

million (USD 4.33 million) from the Austrian government as part of its fund for beverage companies and retailers to enable an actual circular economy for packaging.

According to International Organisation of Vine and Wine (OIV) reports, France produced around 45.8 million hectoliters of wine in 2023, followed by Italy with 43.9 million hectoliters. The two nations and Spain generated most of the wine consumed in Europe. The high production volume signifies the importance of glass packaging in the beverage segment across Europe.

Poland Expected to Witness Significant Growth

Poland is anticipated to experience the most significant growth in packaging in Eastern Europe during the forecast period. The development of glass bottles is expected to be fueled by bottled water, juice, energy drinks, and premium beverages.

The rising mergers and acquisitions in Poland's glass packaging indicate a consolidation trend to enhance competitiveness and market share. This consolidation is likely to lead to increased efficiency, innovation, and potential pricing dynamics, shaping the landscape of the Polish glass packaging market. For instance, in April 2024, CANPACK Group and BA Glass announced the finalization of the sale of CANPACK's Glass operations in Poland to BA Glass. Consequently, the glass plant in Orzesze was transferred to BA Glass and became part of its operations in Poland.

The Polish glass industry is diversified in its manufacturing capabilities. In the Polish glass industry, significant amounts of glass sand produce container glass. To initiate the country's transition to such a system, the Polish government began preparing the introduction of a mandatory deposit for glass and plastic bottles in 2022. The deposit system included reusable glass bottles up to 1.5 liters. Poland is expected to remain a strong performer in the beverage segment, where glass bottles may be the primary packaging material, with a small share of other packaging types.

Companies operating in the industry are focused on innovating new solutions through expansions in the country. For instance, in January 2023, Ardagh Glass Packaging designed a sustainable glass furnace in Poland. The new furnace can gain and maintain lower emission levels while gas, electricity, and water usage will be minimized via multiple sustainable methods. According to the firm, gas, electricity, and water usage will be minimized via heat recovery, turbo compressors, water recovery, and a closed-

loop cooling procedure. The glass manufacturer stated that reducing emissions and enhancing the effect on the environment is a crucial goal for the glass industry. Such technological innovations by major companies are expected to fuel market growth during the forecast period.

As per the Central Statistical Office of Poland, 35.2 million hectoliters of beer were produced in Poland in 2023. As beer consumption in Poland continues to be high, breweries will prioritize adopting advanced glass packaging technologies to ensure product freshness and shelf appeal. This increased demand for efficient, sustainable packaging solutions will drive investments in lightweight, durable glass designs to meet the market's growing needs while minimizing environmental impact.

Europe Glass Packaging Industry Overview

The European glass packaging market is highly competitive, with many regional players having significant shares in the market. The companies are leveraging strategic collaborative initiatives to increase market share and profitability. However, the properties of glass and its benefits to beverages, cosmetics, and other industries are leading to the increased adoption of glass bottles and containers. Vendors are focusing on replacing plastic with green and environment-friendly glass products glass.

April 2024: Ardagh Glass Packaging-Europe purchased the world-leading Swedish glass recycler Svensk Glas?tervinning (SG?). The purchase of SGA by AGP- Europe is driven by a commitment to protect Sweden's circular glass recycling system, in light of the new regulation. This strategic purchase is vital to AGP glass production in Sweden. It will protect glass recycling and close the glass loop, securing the supply of recycled glass cullet one of the most important raw materials for lower-carbon glass packaging.

September 2023: O-I launched an advanced, embossed customized packaging offering. With its O-I: Expressions Signature, O-I has become the first glass manufacturer to produce decorated glass bottles using variable data printing.

September 2023: Ardagh Glass Packaging (AGP) installed a new furnace in Obernkirchen, Germany, which is set to reduce CO2 emissions. According to AGP, the technology at the furnace is designed to use 80% renewable electricity and 20% gas. It added that emissions could be reduced by as much as 60%.

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The market estimate (ME) sheet in Excel format

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