

Glass Packaging Institute (GPI) Industry Update

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GPI Workforce Consultant



Central States Protective League Meeting
Bardstown, KY
October 27-28, 2025

Association Activity in Support of Glass



TTB – Size Request and Rulemaking - Success

As part of a broader rulemaking, in July 2022 GPI submitted comments to the U.S. TTB (federal regulatory agency for the alcohol industry, housed under the Treasury Dept.), asking for specific size approvals for glass containers in the spirits and wine categories

- The rulemaking was in response to the Biden Administration's Executive Order to increase competition
- **One of GPI's size requests (12 ounce/355ml for spirits)** has long been approved for metal containers, based on an older statute referencing closures and container shape
- **In January, the 12-ounce size for spirits was approved for glass containers!**



Marketplace Examples for 355ml Mixed Spirits



Spirits in 10-ounce glass bottles “ok”, now 12oz. may also be packaged in glass



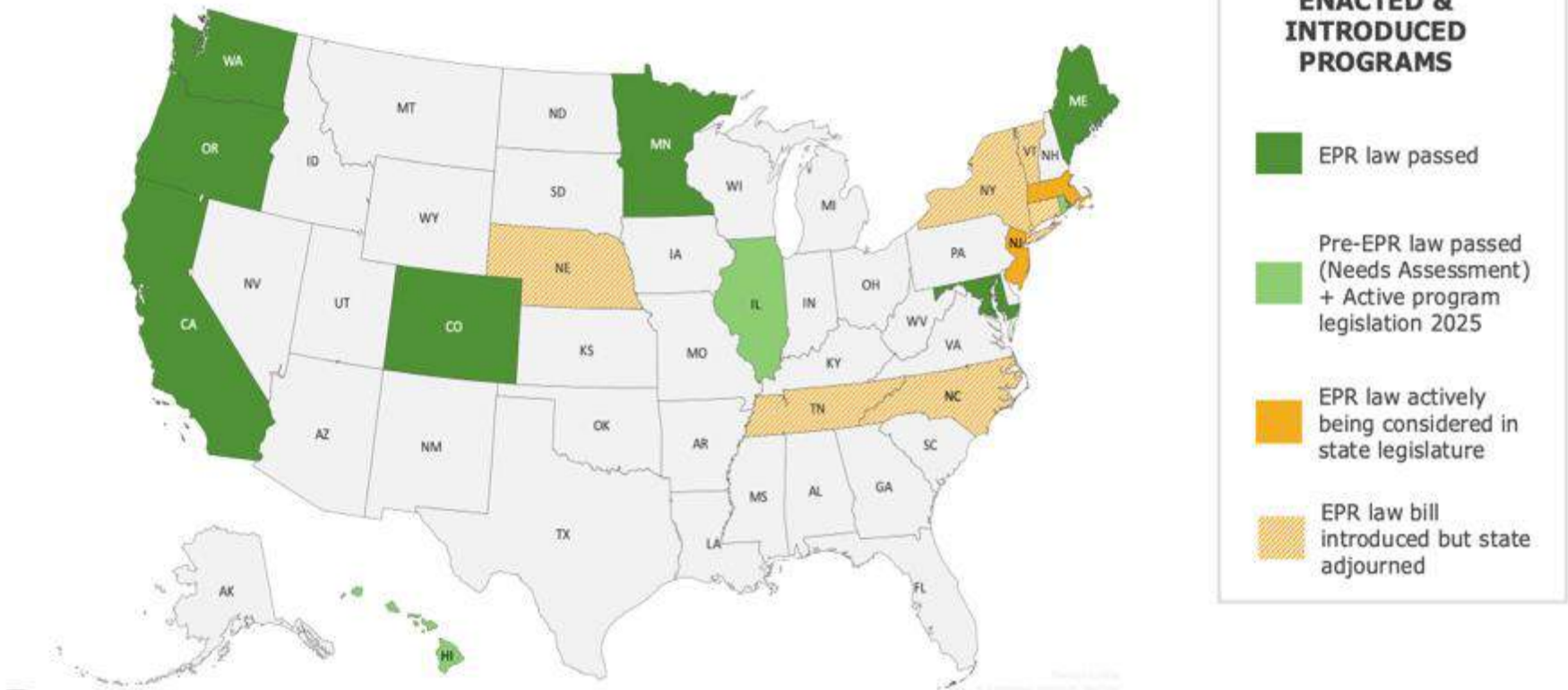
More popular 355ml (12-ounce) size format



The new approval has opened up additional customer markets looking

EPR for PPP Legislation

Current as of 08/01/2025



GPI continues to advocate for glass packaging across EPR programs

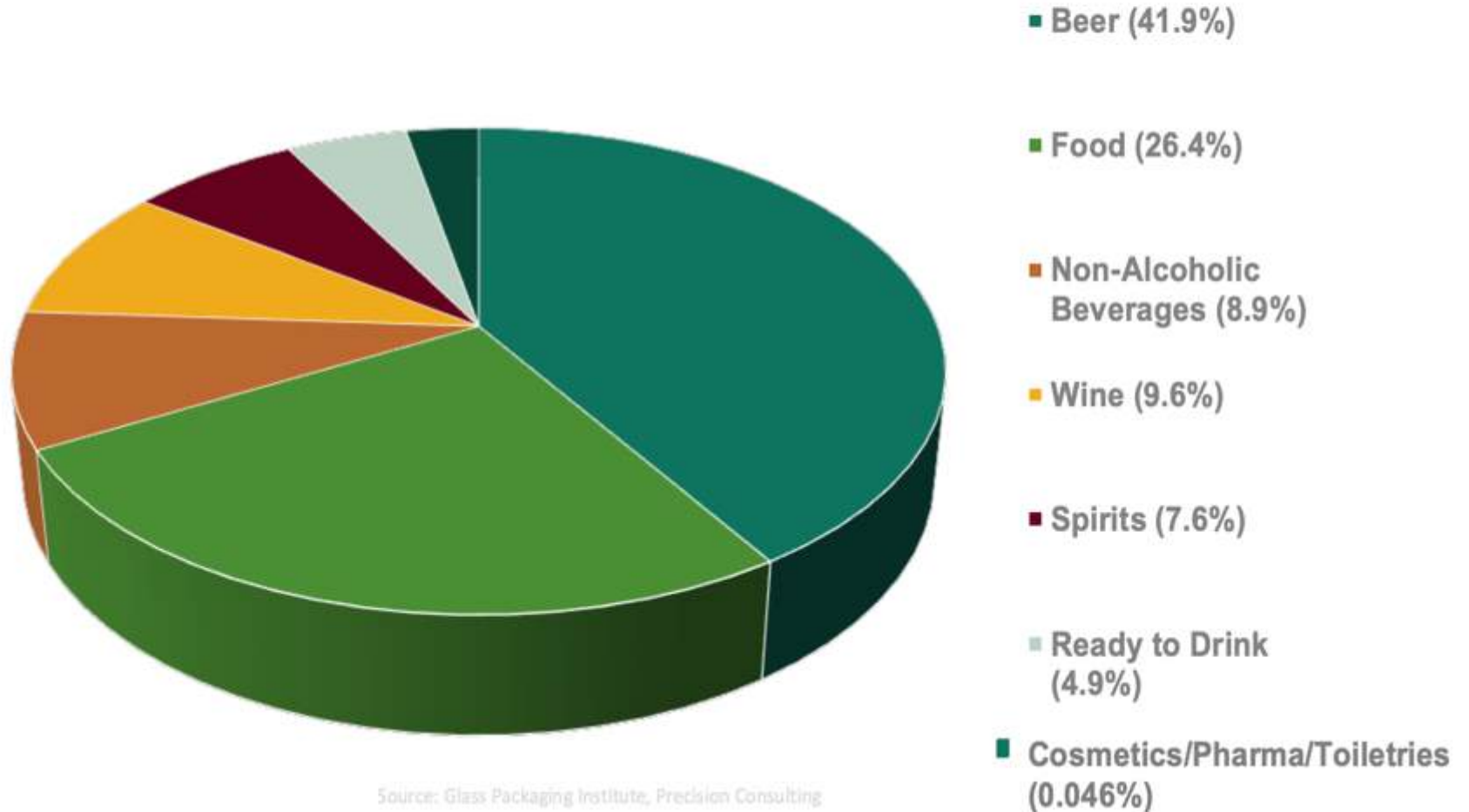
Less emphasis on package weight for brand fees paid into the EPR programs, and a greater emphasis on package recyclability and environmental attributes to reduce costs are at the core of our positions

Statistical Update



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End Market Share of U.S. Glass Container Shipments by Category (YTD, Through August 2025)



Key Glass End Markets - Changes Over Time

Beer

- **2008 - 59%**
- 2012 - 58%
- 2016 - 56%
- 2019 - 51%
- 2021 – 46%
- **2022 – 45%**
- **2024 (Aug) – 45%**
- **2024 (Aug) – 41.9%**

Wine

- **2008 - 6%**
- 2012 - 7%
- 2016 - 8%
- 2019 - 9%
- 2021 9%
- 2022 – 10%
- **2024 (Aug) – 9%**
- **2025 (Aug) – 9.6%**

Food

- **2008 - 17%**
- 2012 - 17%
- 2016 - 18%
- 2019 - 20%
- 2021 – 23%
- 2022 – 23%
- **2024 (Aug) – 25%**
- **2025 (Aug) – 26.4**

Ready to Drink (RTD) Alcoholic Beverages

- **2008 - 7%**
- 2012 - 6%
- 2016 - 5%
- 2019 - 6%
- 2021– 6%
- 2022 – 5%
- **2024 (Aug) – 5%**
- **2025 (Aug) – 4.9%**

Key Glass End Markets - Changes Over Time

Non-Alcoholic Beverages

- **2008 - 8%**
- 2012 - 8%
- 2016 - 9%
- 2019 - 9%
- 2021 – 10%
- 2022 – 10%
- **2024 (Aug) – 10%**
- **2025 (Aug) – 8.9%**

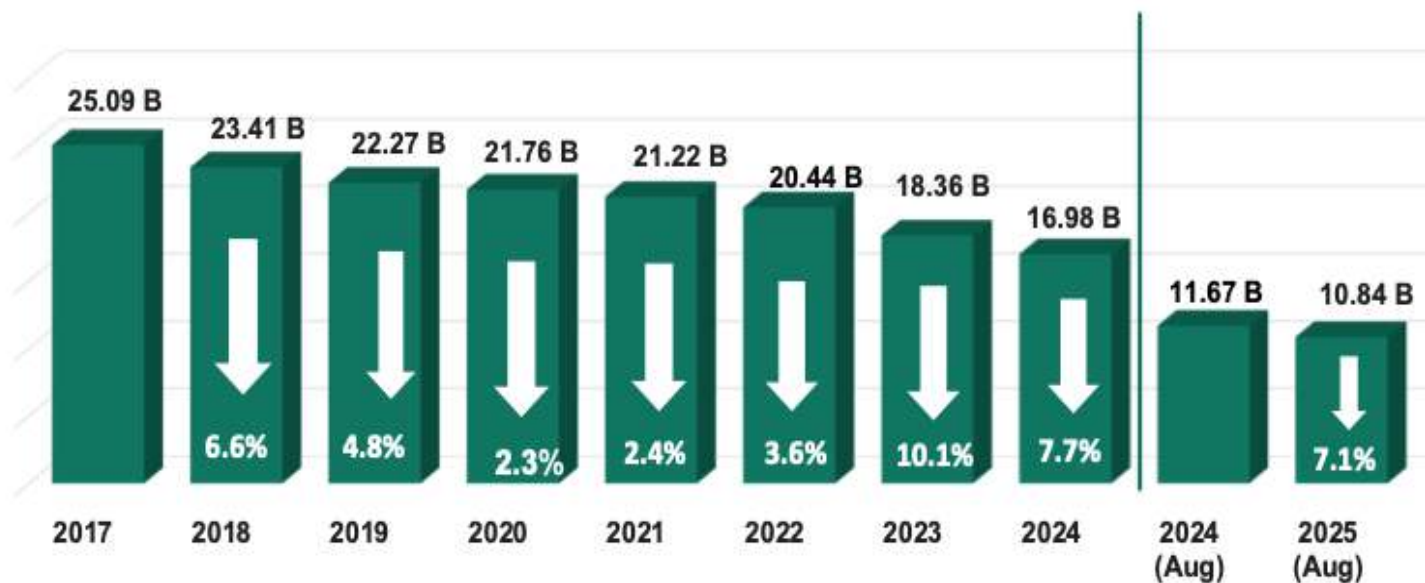
Spirits

- **2008 - 3%**
- 2012 - 4%
- 2016 - 4%
- 2019 - 5%
- 2021 – 6%
- 2022 – 7%
- **2024 (Aug) – 6%**
- **2025 (Aug) – 7.6%**

Note – The Cosmetics/Pharma Category Registers as 0.37% of End Market Share

US Glass Plant Shipments to Customers

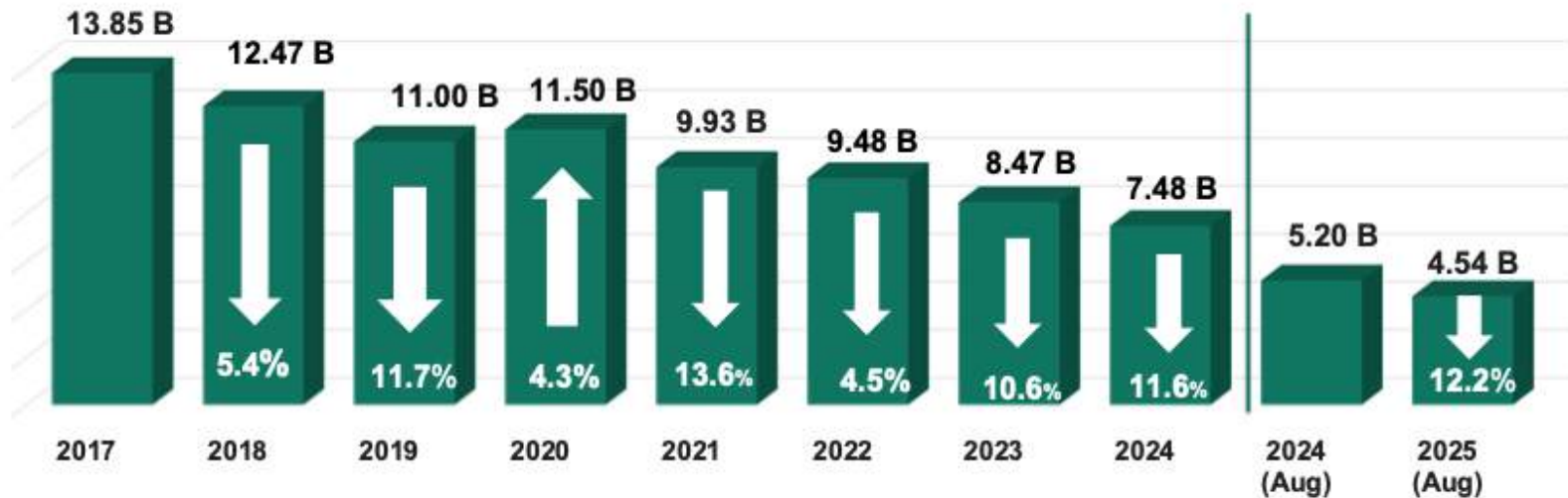
(listed in billions of bottles), 2017 – August 2025



Source – Precision Consulting, Representing ~95% of US Glass Container Plants

US Beer Bottle Shipments to Customers

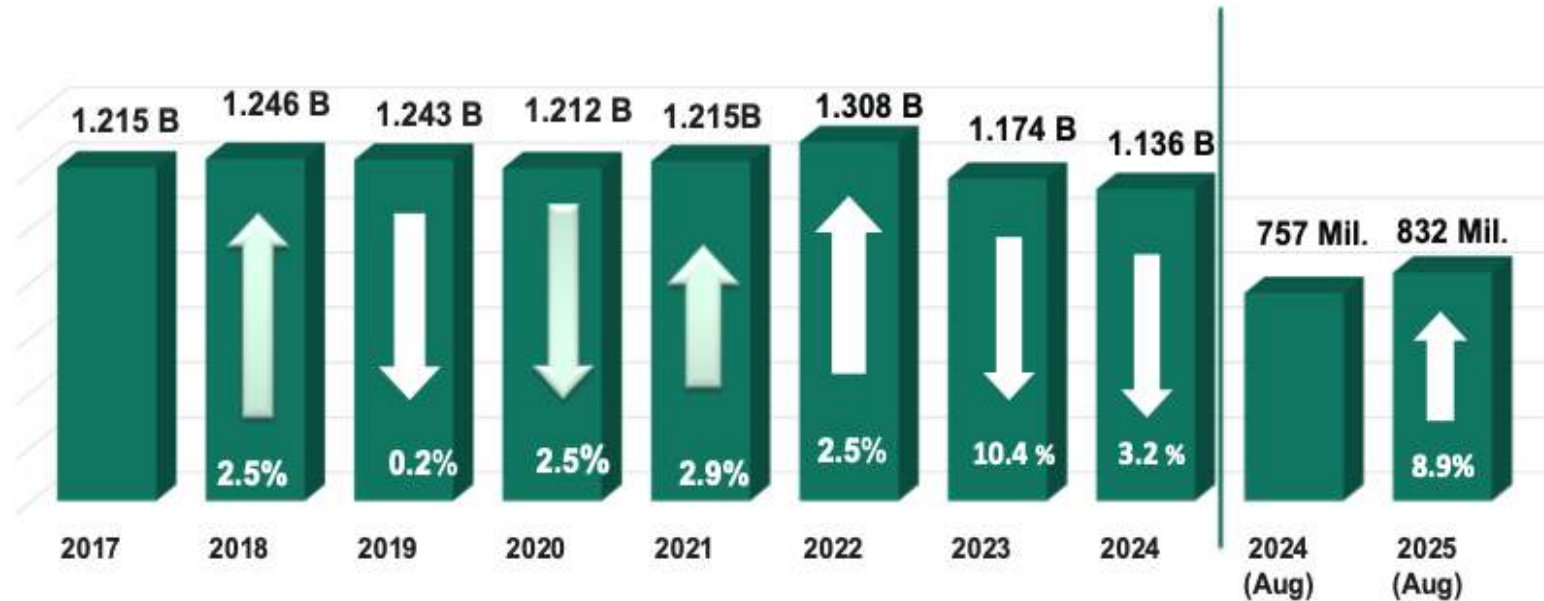
(listed in billions of bottles), 2017 – Thru August 2025



Source – Precision Consulting, Representing ~95% of US Glass Container Plants

US Spirits Bottle Shipments to Customers

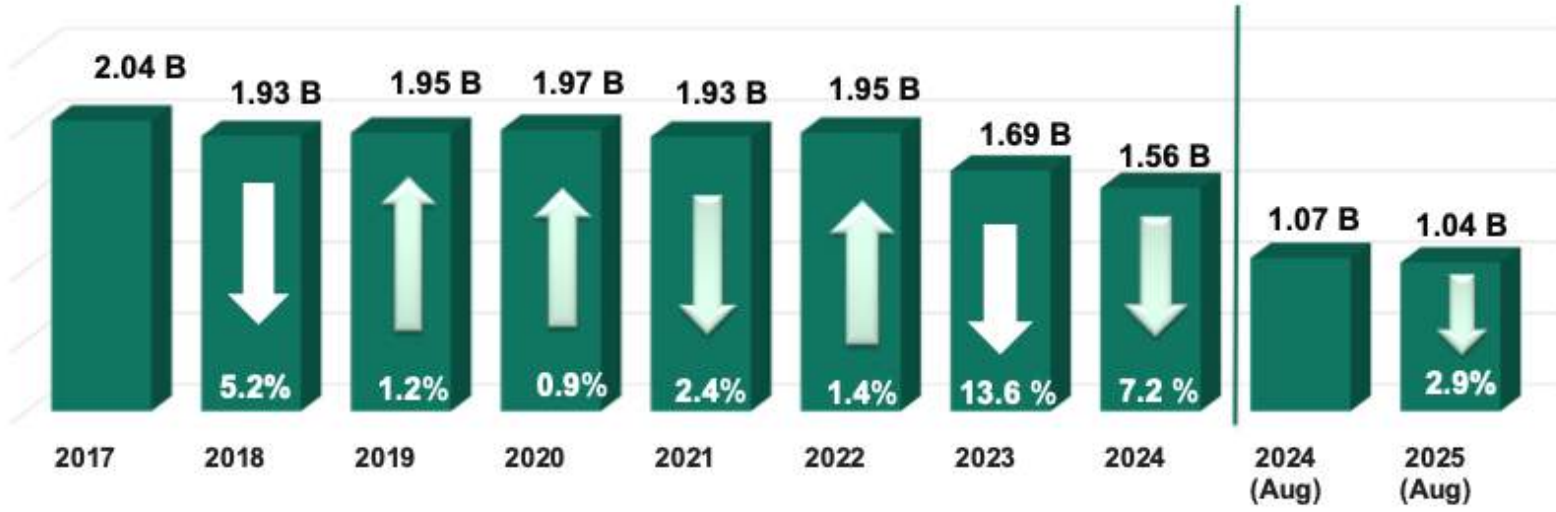
(listed in millions and billions of containers), 2017 – August 2025



Source – Precision Consulting, Representing ~95% of US Glass Container Plants

US Wine Bottle Shipments to Customers

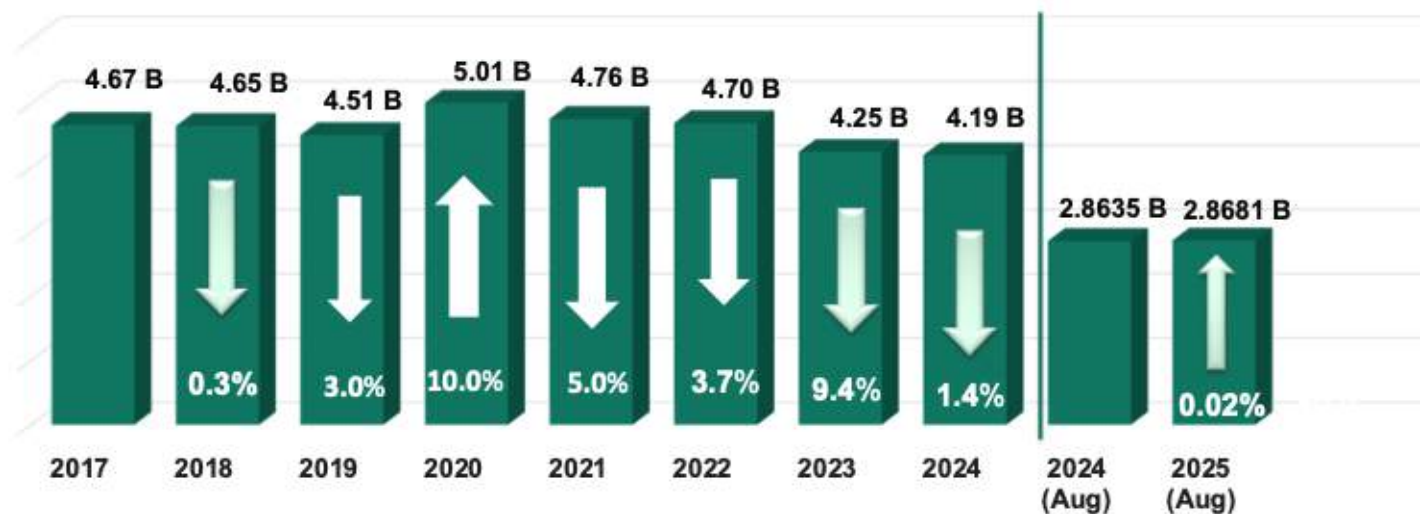
(listed in billions of containers), 2017 – August 2025



Source – Precision Consulting, Representing ~95% of US Glass Container Plants

US Food Container Shipments to Customers

(listed in billions of containers), 2017 – August 2025



Source – Precision Consulting, Representing ~95% of US Glass Container Plants

Glass Container Imports



Tariff and Trade Overview

GPI continues to follow the tariff rates and subsequent tariff implementations on U.S. imports

The week of November 3rd, the U.S. Supreme Court will hear the merits of consolidated shipper and importer legal challenges regarding the President's authority and issuance of "reciprocal" tariffs under the International Emergency Economic Powers Act (IEEPA)

Sec. 232 (national security) and Sec. 301 (economic harm) tariffs are not under current legal review

GPI was among the first industries in 2017 and after to testify in support of the Sec. 301 tariffs on Chinese glass container imports from (both at 10 and 25 percent)

GPI is a member of the Toasts Not Tariffs coalition, led by the Distilled Spirits Council (DISCUS), which requests retaliatory tariffs on alcohol exports not be placed on the beer, wine, spirits and cider industries – due to the nature of the U.S. alcohol producers presence on a global scale, many of those glass bottles filled for export are made domestically

GPI continues to follow USMCA/NAFTA discussions among the three countries – that agreement is required to be reviewed in July of 2026

Country Tariff Rates for Glass Container Imports to the US

Mexico	25%	Poland	15%
	USMCA products remain tariff-free which includes all glass bottles manufactured in Mexico	South Korea	15%
China	55%	Philippines	19%
	This rate includes Sec. 301 tariffs at 25%, and the broader tariff rate of 30%	Turkey	15%
India	50%	Indonesia	19%
Taiwan	20%	Chile	10%
		Hungary	15%
Canada	35%	Vietnam	20%
	USMCA products remain tariff-free which includes all glass bottles manufactured in Canada	Czechia (Czech Republic)	15%
	However, if US CBP determines transshipment is occurring in order to avoid other tariffs, a 40% tariff will be levied on that import	Spain	15%
		Belgium	15%
		Bulgaria	15%
		Japan	15%
		Portugal	15%
		Ecuador	15%
		United Kingdom	10%
		Oman	10%
		Sri Lanka	20%
		Colombia	10%
		Venezuela	15%
		Slovenia	15%
		Peru	10%
		Suriname	10%
Italy	15%	Australia	10%
Egypt	10%	Brazil	50%
Germany	15%		
Saudi Arabia	10%		
France	15%		
Thailand	19%		
United Arab Emirates	10%		

Glass Imports from All Countries, All Sizes, Jan-July 2025 vs. 2024

Country	January 2025 - July 2025	January 2024 - July 2024
Mexico	8,998,923	8,515,015
China	5,172,958	6,185,442
India	2,312,367	2,103,629
Taiwan	2,046,882	2,218,508
Canada	1,454,673	1,244,582
Italy	780,177	1,208,325
Egypt	522,583	590,285
Germany	457,494	474,434
Saudi Arabia	300,663	106,671
France	262,673	236,108
Thailand	252,099	329,853
United Arab Emirates	226,404	164,115
Poland	216,064	368,266
South Korea	171,200	139,336
Philippines	155,954	110,637
Turkey	155,483	109,668
Belgium	134,745	214,208
Chile	133,788	161,952
Indonesia	133,051	49,221
Hungary	97,404	150,719

All food and beverage empty glass container imports up 3 percent YTD from all countries combined – very little decrease in the top 20 countries of import – India being the outlier, with a 50% tariff

Source: U.S. International Trade Commission, (USITC), U.S. Dept. of Commerce, Quantity Gross

Glass Imports from All Countries, 750ml Botte Size, Jan-July 2025 vs. 2024

Country	January - July 2025	January - July 2024
Mexico	1,561,181	1,337,557
China	920,774	1,535,924
Canada	361,149	416,759
India	214,030	204,255
Taiwan	200,224	271,904
Italy	186,785	139,398
United Arab Emirates	158,842	72,120
Poland	151,619	255,359
France	114,314	85,569
Chile	113,448	159,247
Saudi Arabia	91,232	0
Germany	65,251	60,381
Indonesia	35,360	23,871
Turkey	35,316	700
Egypt	32,806	436
Bulgaria	27,499	35,533
Sri Lanka	22,063	9,122
Colombia	20,719	43,530
Japan	19,864	16,476
Belgium	13,108	3,897

All 750ml sized glass container imports down 8 percent YTD from all countries combined – more significant decrease across the top countries of import, the exception being Mexico

Source: U.S. International Trade Commission, (USITC), U.S. Dept. of Commerce, Quantity Gross

Glass Imports from All Countries, 12 Oz. Botte Size, Jan-July 2025 vs. 2024

Country	January - July 2025	January - July 2024
Mexico	2,406,376	2,053,485
Canada	945,459	660,529
India	313,964	262,112
China	311,731	354,134
Thailand	129,792	205,920
Taiwan	126,780	112,756
Egypt	81,471	74,996
Ecuador	27,061	28,160
South Korea	25,189	0
Vietnam	10,770	9,907
France	10,702	8,087
Indonesia	8,970	873
Italy	8,730	29,298
Germany	6,581	13,847
Peru	4,253	6,952
Lebanon	2,948	0
Portugal	2,446	1,615
Colombia	1,202	1,143
Poland	1,096	0
United Arab Emirates	723	1,213

All 12 oz. sized glass container imports up 12 percent YTD from all countries combined

Source: U.S. International Trade Commission, (USITC), U.S. Dept. of Commerce, Quantity Gross

Glass Imports from All Countries, 16-32 Oz. Jar Size, Jan-July 2025 vs. 2024

Country	January - July 2025	January - July 2024
India	264,920	49,502
Saudi Arabia	193,881	106,408
China	184,755	288,116
Taiwan	88,208	72,580
South Korea	82,355	64,536
Indonesia	74,047	10,445
Egypt	49,251	61,867
Mexico	42,653	14,766
Germany	26,071	11,184
Canada	24,299	20,891
Czechia (Czech Republic)	23,517	12,756
Portugal	16,666	13,087
Oman	12,474	10,653
Italy	10,348	93,560
Suriname	5,133	0
Poland	4,808	2,024
France	4,203	8,375
United Kingdom	4,107	3,216
Bulgaria	1,065	0
Sri Lanka	612	0

All 16-32 oz. sized glass container imports up 27 percent YTD from all countries combined, led by growth from India

Source: U.S. International Trade Commission, (USITC), U.S. Dept. of Commerce, Quantity Gross

Clear Choice Awards



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Clear Choice Awards - Winning Entries

2024 Winner



In Recognition

Ardagh Glass Packaging—North America

Sapulpa, OK

Beer, Cider & Malt Beverages Category

Little King's Cream Ale



Clear Choice Awards - Winning Entries

2024 Winner



In Recognition

Ardagh Glass Packaging–North America

Winchester, IN

Food Category

Ball® 140th Anniversary Jar



Clear Choice Awards - Winning Entries

2024 Winner



In Recognition

Ardagh Glass Packaging—North America

Port Allegany, PA

Wine Category

Zilly



Clear Choice Awards - Winning Entries

2024 Winner



In Recognition

Ardagh Glass Packaging—North America

Burlington, WI

Sustainability & Innovation Category

Chameleon Cold-Brew (32oz)



Clear Choice Awards - Winning Entries

2024 Winner



In Recognition

Ardagh Glass Packaging—North America

Pevely, MO

Sustainability & Innovation Category

Chameleon Cold-Brew (10oz)



Clear Choice Awards - Winning Entries

2024 Winner



In Recognition

Ardagh Glass Packaging—North America

Pevely, MO

Non-Alcoholic Beverage Category

Volleman's 32 oz. Refillable Milk



Clear Choice Awards – Winning Entries Group Shot



Additional Focus Areas



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Social Media

KEY METRICS

FOLLOWERS

22.1k ↑5%

REACH

46.6k Steady Reach

FACEBOOK

6,292

LINKEDIN

10,452

INSTAGRAM

1,100

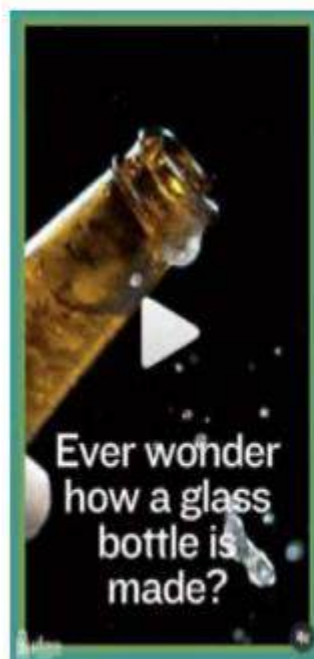
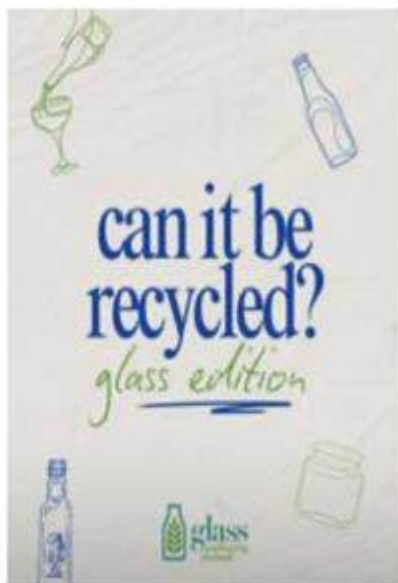
TWITTER/X

4,176

TIKTOK

76

TOP PERFORMING POSTS



2026 Trade Shows

GPI Trade Show Presence in 2026 + Sponsorship Prospects

Date	Trade Show	City	Association
January 11-13	Winter Fancy Faire (Specialty Food Association)	San Diego, CA	Fancy Food (West)
January 27-29	Unified Wine & Grape Symposium	Sacramento, CA	Unified Wine
February 2-5	WSWA Access Live	Las Vegas, NV	WSWA
March 3-6	Natural Products Expo West	Anaheim, CA	Natural Products
April 17-18	American Craft Spirits Convention	Sacramento, CA	Craft Spirits
April 20-22	Craft Brewers Conference	Philadelphia, PA	Craft Brewers
June 28-30	Summer Fancy Food Show (Specialty Food Association)	New York, NY	Fancy Food (East)
October 18 - 21	Pack Expo	Chicago, IL	Pack Expo

Questions?

Thank You

