

# Glass Packaging Institute (GPI) Industry Update

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Scott DeFife  
GPI President



West Coast Protective League Meeting  
San Diego, CA  
November 8th, 2025

# Association Activity in Support of Glass

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# California – Key Legislation for 2025

## Assembly Bill 899

Increases and extends market development payments to glass bottle manufacturers for the purchase of cullet used to make glass bottles in California. Specifically, the legislation increases the existing market development payment for cullet from \$50 per ton to \$150 per ton and extends the sunset for this payment program to January 1, 2030.

**9/10/25** – Passed Assembly & Senate – Enrolled and to Governor

**9/15/2025** – GPI sent a letter to Governor Newsom requesting he sign into law

**10/11/2025** – Governor Newsom Signed into Law



September 15, 2025

The Honorable Gavin Newsom, Governor  
State of California  
1021 O Street, Suite 9000  
Sacramento, CA 95814

**Re: AB 899 (Ransom) – Glass Cullet Market Development – Signature Request**

Dear Governor Newsom,

The Glass Packaging Institute (GPI) requests your signature on AB 899 by Assemblymember Ransom and sponsored by GPI. GPI is the national trade association representing glass container manufacturers and suppliers, including the four container factories located in Tracy, Modesto, Vernon and Madera.

**WCPL League Support of the Legislation**

**Thank You!**



# California – Key Legislation for 2025

## Senate Bill 674

SB 674 would have lowered the deposit fee on boxed wine and spirits under 24 ounces to \$.10. It is currently at \$0.25 cents. GPI opposed the legislation.

Earlier and similar legislation (AB 457, 2023 session) to lower the deposit was vetoed by Governor Newsom.

In his 2023 veto message, the Governor stated that the higher deposit for boxed and bagged container types, *“was intended to create market signal to incentivize industry to either stimulate development and create recycling pathways for these container types, or to bottle the beverages in a more cost effective - and thus, easier to recycle - manner, such as with glass or aluminum.”*

**Status:** Passed the Senate, Failed to Advance out of the Assembly (dead)

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## 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

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# Issues GPI Continues to Follow

## **Tariff and Trade Agreements**

*USMCA Review Period for July 2026 Meeting*

## **Proposed UP/NS Rail Merger**

*GPI remains concerned on impact to service delays, costs and current route viability and is engaged with Rail Shipper Coalition on messaging and request for comprehensive and exhaustive review*

*Comment and hearing period before the STB will likely be in Q2 of 2026*

## **California Cap and Trade Program**

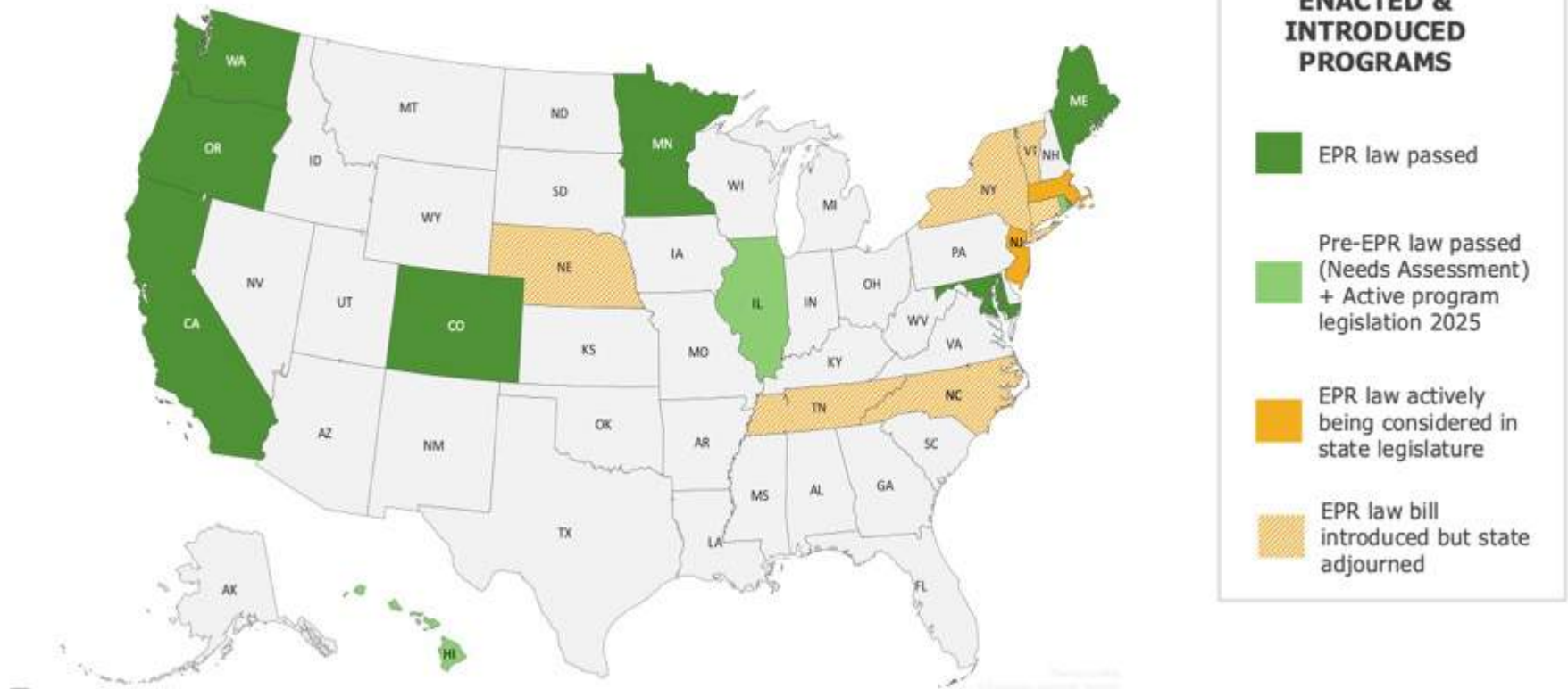
*Recently approved reauthorization will require adjustments to the Cap and Trade Program – GPI remains engaged in the regulatory process, and supportive of ensuring maximum free allocations to glass container facilities, as a recognized, energy-intensive-trade-exposed (EITE) industry*





# 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

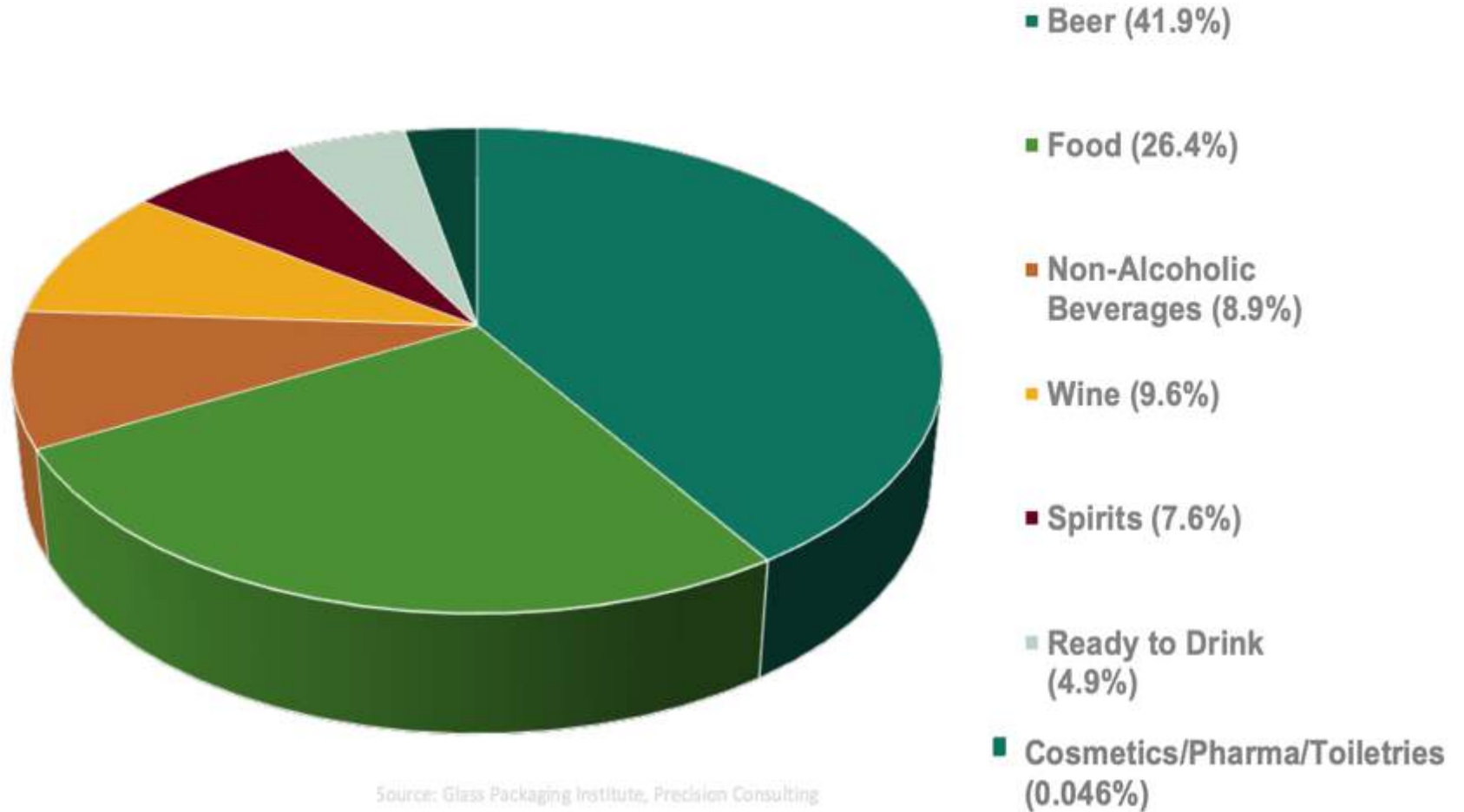


# Statistical Update

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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%**

## Food

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

## Wine

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

## 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%**

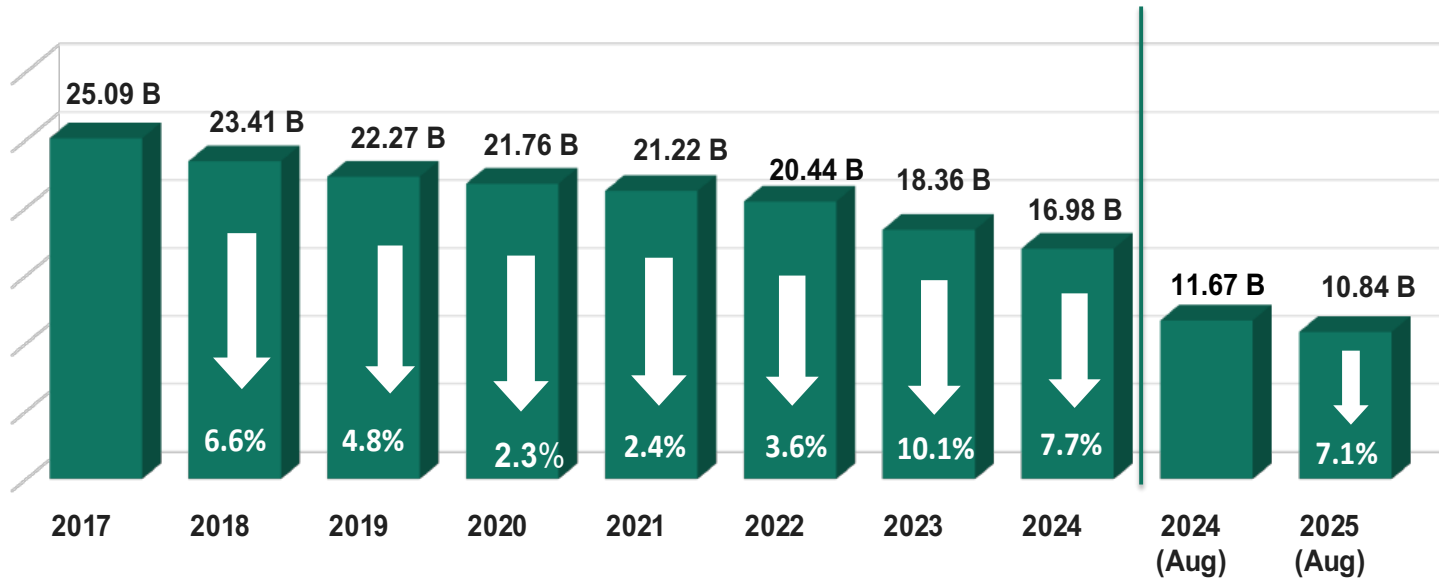
## Spirits

- **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

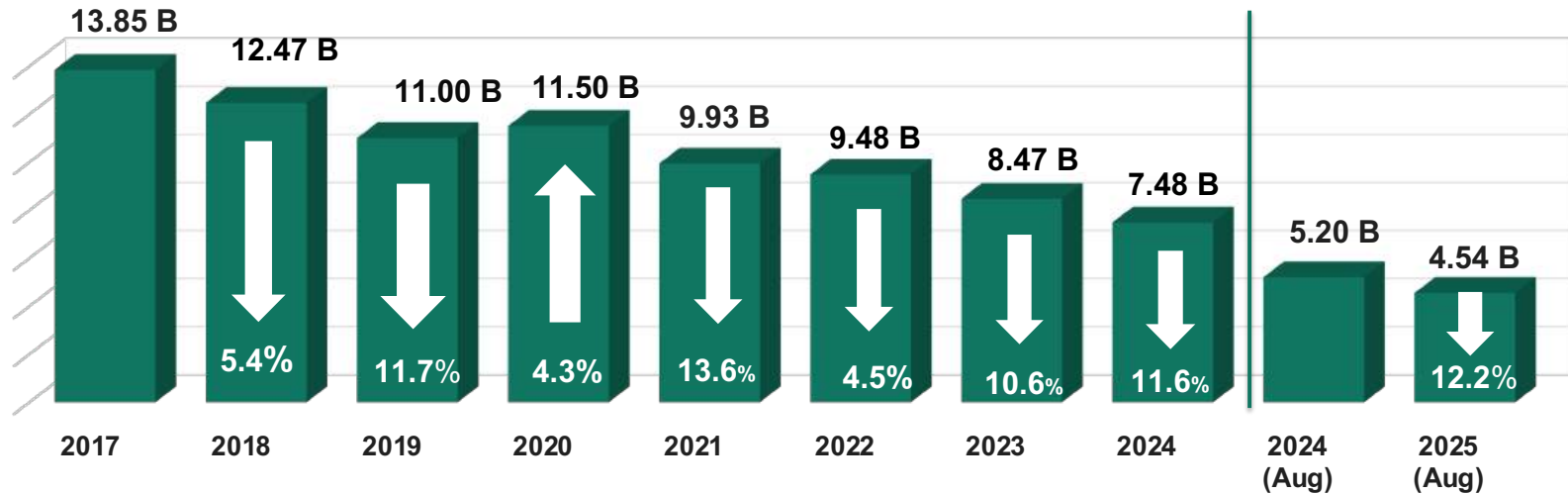
(listed in billions of bottles), 2017 – August 2025



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

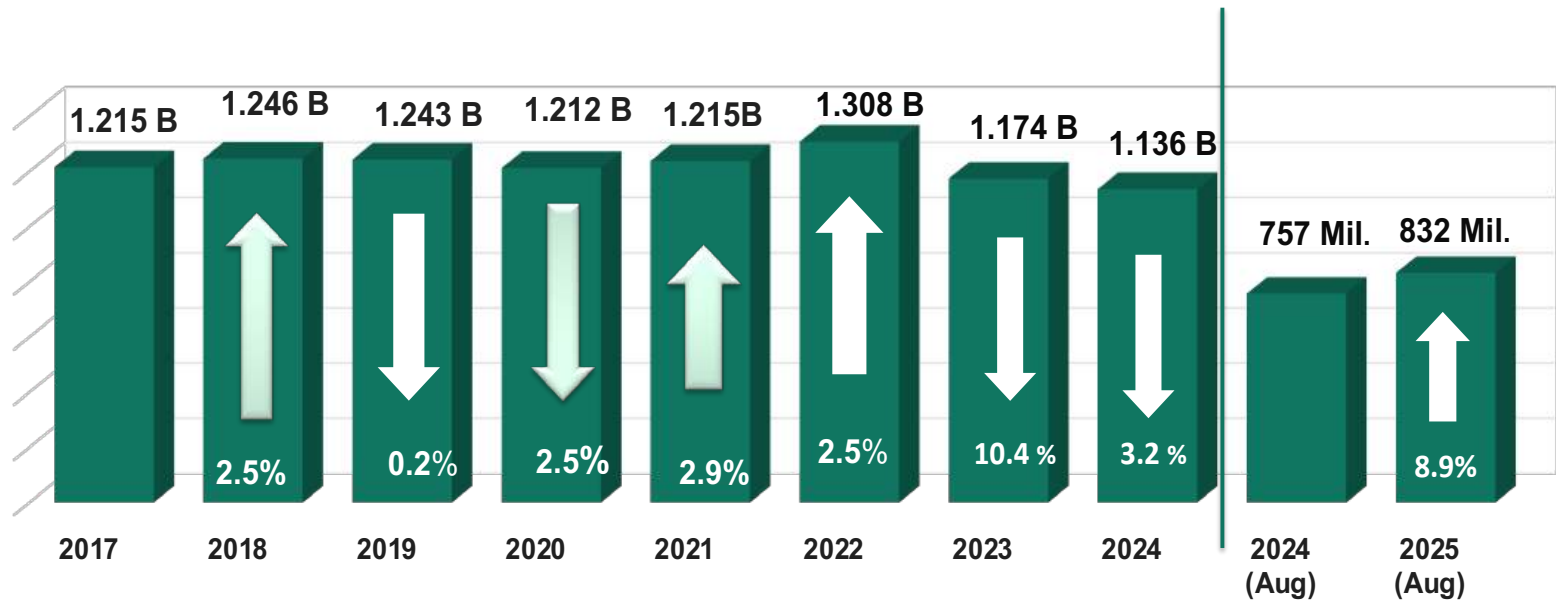


Source – Precision Consulting, Representing ~95% of US Glass Container Plants



# US Spirits Bottle Shipments to Customers

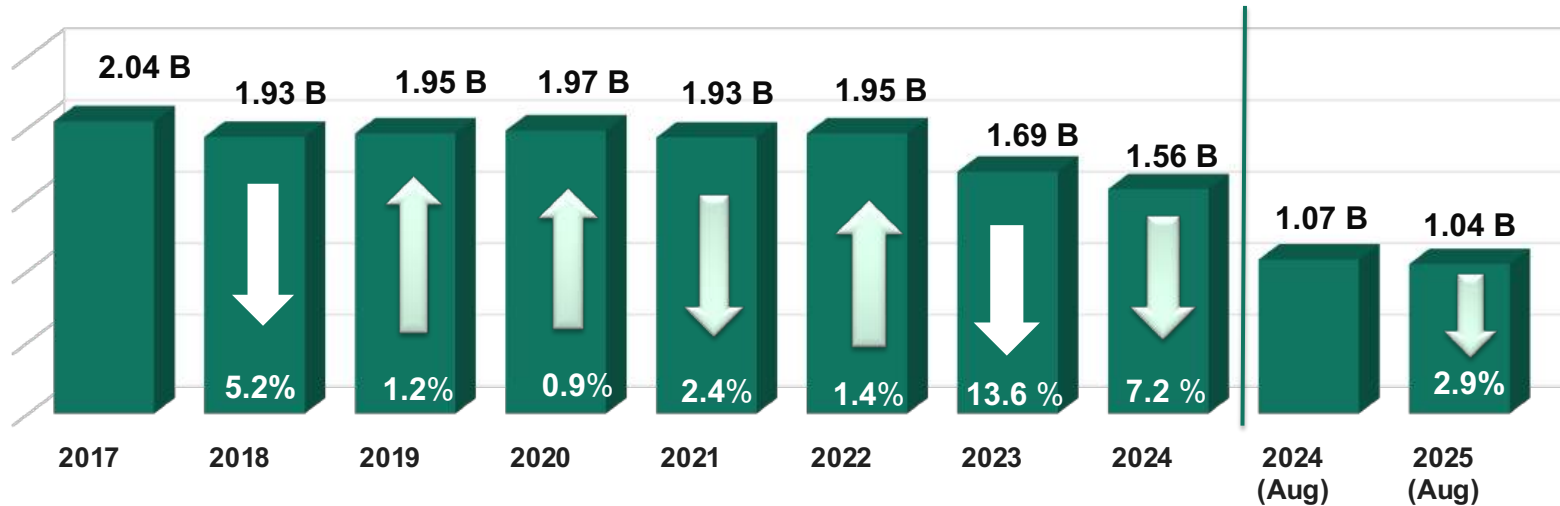
(listed in millions and billions of containers), 2017 – August 2025



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

# US Wine Bottle Shipments to Customers

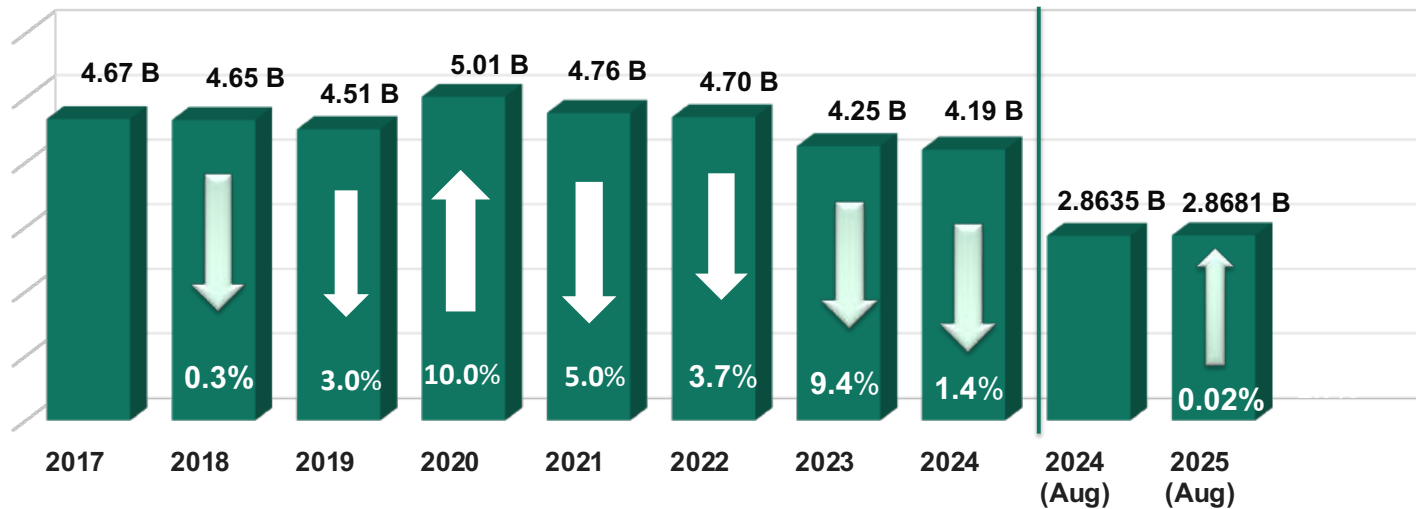
(listed in billions of containers), 2017 – August 2025



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

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# Tariff and Trade Overview

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

The week of November 3<sup>rd</sup>, 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% |
| Italy                | 15%                                                                                                                                  | Sri Lanka                | 20% |
| Egypt                | 10%                                                                                                                                  | Colombia                 | 10% |
| Germany              | 15%                                                                                                                                  | Venezuela                | 15% |
| Saudi Arabia         | 10%                                                                                                                                  | Slovenia                 | 15% |
| France               | 15%                                                                                                                                  | Peru                     | 10% |
| Thailand             | 19%                                                                                                                                  | Suriname                 | 10% |
| United Arab Emirates | 10%                                                                                                                                  | Australia                | 10% |
|                      |                                                                                                                                      | Brazil                   | 50% |

## 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*



# 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



## Clear Choice Awards Recognition



**Rick Vitatoe**

Glass Council of the United Steelworkers (USW) Vice President & International Rep

**Kevin Hardie**

GPI Workforce Industry Rep

*.Engraved Award Presentation at the Central States Protective League Meeting*

## Clear Choice Awards Recognition



**Protective League Members (Ardagh) Display Clear Choice Award Winners at Central States Protective League 2025 Fall Meeting**



# 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?

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Thank You

