

# Container glass in **INDIA**: an industry overview

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## **G**AINING MOMENTUM

Consisting of more than 30 glass container producing companies of different sizes, Indian container glass industry has been among the fastest growing container glass industries in the Asian region. Rapid spread of modern forms of retail during the past decade, increasing disposable incomes in the hands of a vast section of the population, growing awareness of health and hygiene, and increased spending on nonalcoholic beverages all represent some of the impor-

Surpassing China in demographic terms this year, INDIA has become the most populated country in the world. With its estimated 1.40 billion people, India has emerged as one of the largest consumers of packaged foods, beverages and pharmaceutical products - all necessitating scores of glass containers. In this issue of Glass Machinery Plants & Accessories we take a look at the Indian container glass industry.



## COUNTRY STUDY

tant factors which have fuelled growth in the Indian container glass industry. Major container glass producers Hindustan National Glass Limited, AGI Greenpac and PGP Glass (formerly Piramal Glass) have all expanded their capacities and capabilities during the last few years. Indeed nearly a dozen new mid and small-sized container glass producers have joined the industry over the last decade.

Factors such as growing income, changing lifestyle habits, increased internet penetration, the rapid expansion of organised retail, the popularity of

online food delivery and renewed emphasis on safety and hygiene are all creating huge opportunities for the packaging industry - particularly for glass packaging. Alcoholic beverages are witnessing rapid growth owing to their high-growth potential and increasing social acceptance. The share of glass packaging in Indian Made Foreign Liquor (IMFL) is expected to increase as premium segments constituting more than 40 percent of IMFL volume use 100 percent glass packaging. The share of this segment is expected to grow to 67 percent in volume by 2027. Hence the overall



share of glass packaging in IMFL will also increase. In the Mass/Popular segment, the share of glass bottles is currently reduced due to emergence of cheap alternate PET bottles. However, revenue leakages and ill effects on health are forcing state governments to phase back glass packaging for liquor. Riding the wave of a strong consumption story, the packaging industry is poised to gain the most from the increasing demand from the food and beverages industry, as well as that of the pharmaceuticals and cosmetics sector. India's food and beverages packaging market, which was valued at USD 33.22 billion in 2020, is expected to reach USD 156.25 billion by 2026, registering a CAGR of 29.88 percent.

### HINDUSTHAN NATIONAL GLASS & INDUSTRIES LIMITED (HNGI)

Hindusthan National Glass & Industries Ltd (HNG) is a key player in India's container glass industry - boasting 13 furnaces with 4300 TPD installed capacity. It caters to a broad range

COMPANY	LOCATION	CAPACITY
HINDUSTAN NATIONAL GLASS INDUSTRIES	RISHIKESH, RISHRA, NASIK, PUDUCHERRY, AND NAIDUPETA	4400 TONNES PER DAY
AGI GREENPAC	HYDERABAD AND BHONGIR	1754 TONNES PER DAY
PGP GLASS	KOSAMBA, AND JAMBUSAR	1530 TONNES PER DAY
CANPACK INDIA	AURANGABAD	900 TONNES PER DAY
HALDYN GLASS	VADODARA	350 TONNES PER DAY
SUNRISE GLASS	SURAT	220 TONNES PER DAY
JANTA GLASS	VADODARA	220 TONNES PER DAY
HYALINE GLASS	BHOPAL	150 TONNES PER DAY
VITRUM GLASS	MUMBAI	130 TONNES PER DAY
PRAGATI GLASS INDUSTRY	KOSAMBA	170 TONNES PER DAY
ENKI GLASS INDUSTRY	BHARUCH	120 TONNES PER DAY

Table- Container glass producers in India



of industries including food & beverage (F&B), pharmaceutical and wellness, alcoholic beverages and household and cosmetics. The company has a large client base and supplies top customers in every segment - exporting to more than 23 countries.

The largest container glass-maker, HNG, had been facing issues of insolvency for quite some time. The company was on the path to an over-ambitious expansion spree which led to huge debt pile up. The company had undertaken aggressive capacity expansion during the last decade. It commercialized greenfield operations of 600 TPD glass at Halol, 650 TPD greenfield expansion at Naidupeta, 650 TPD brownfield expansion in Sinnar and other brownfield expansion to increase capacities while also

expanding over these years via inorganic routes.

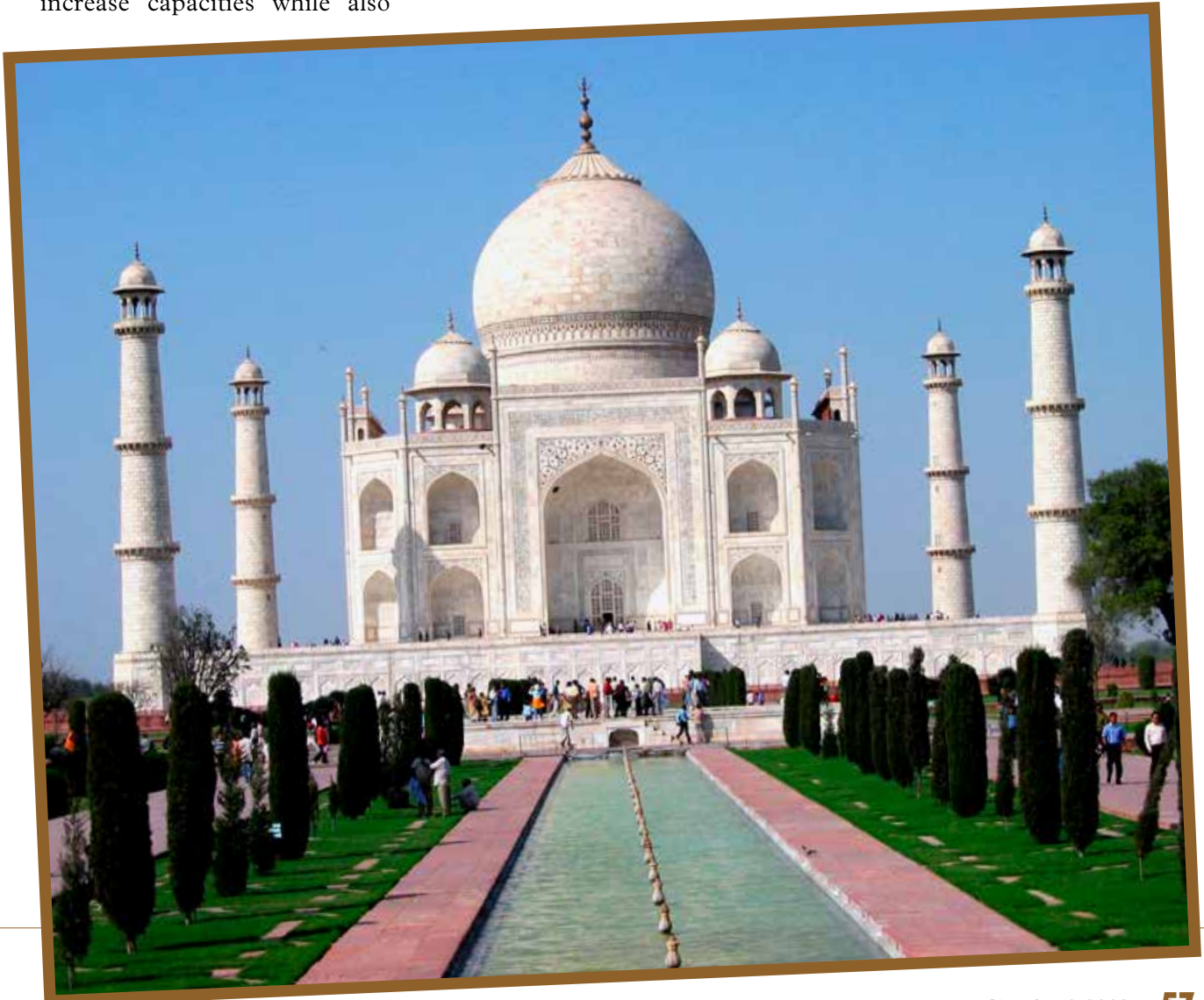
### **AGI GREENPAC**

In recent years Telangana based AGI Greenpac has invested significantly in container glass production infrastructure. The company operates three modern container glass production facilities. Responding to customer needs and trends, it has developed and produced internationally-acclaimed bottle designs using cutting edge glass decoration techniques.

The company has one of the most modern, advanced screen printing facilities available in the country - which involves the use of Strutz, Rosario and Tecno 5 machines. All state of the art, they have the capability to print up to six differ-

ent colours on a single bottle. AGI Greenpac has an installed capacity to print more than 1.2 million bottles per day.

Says company management: "Our machines can print up to nine colours, including precious metals such as gold, platinum and copper. On print runs from 100 cases to 25,000 cases, direct screen-printing costs are competitive with all other labeling applications. This alternative to paper creates eye-catching labels that are resistant to wrinkling, smearing, scuffing and are -most importantly- waterproof. Beverage Incentive Glass is a full-service bottle and glassware direct screen labelling company. We specialize in screen printing, simulated etching and decals for wine, spirit, beer and specialty food containers. Going paper-



less will actually strengthen your brand impact by elegantly screen printing your labels. There are many benefits from ACL such as increased bottling line efficiency, improved label durability, design flexibility and branding/packaging impact - all increasing client brand value by providing unique and cost-effective alternatives to paper labels. Our specially-adapted screen printing process lets you utilise a larger print area than paper labels, so you can dream big when it comes to creating striking graphics for your product. Think unusually shaped labels, multiple colours, graphics meant to be seen through transparent liquid or even designs that wrap right around the bottle.”

The company is moving up the value chain with its foray into manufacturing of high-margin speciality glass by setting up a greenfield facility in Bhongir, Telangana - having manufacturing capacity of 154 tonnes per day. This new plant caters to the high-end cosmetic and perfumery sector, high-end pharmaceuticals including vials and premium spirits, among others.

The company commenced commercial production of this facility from Jan 1 of this year. It incurred capex of Rs 270 cr for this new plant, which includes one new furnace with five manufacturing lines spread across 15 acres. The plant will also consist of an integrated decoration facility for hot-foil stamping, coating, lacquering and colouring.

Apart from domestic requirements, products manufactured from this expansion are likely to focus on exports to the US, Australia and European countries. This 154 TPD furnace is in the process of full loading and is currently operating at 65-70 percent capacity utilisation - that's above breakeven levels, which is why management anticipates reaching 100



percent capacity utilisation by the end of this fiscal year.

#### PGP GLASS

PGP Glas Private Limited is a global specialist in design, production and decoration of glass packaging (flaconage). The company leads the way globally for glass packaging solutions in businesses such as Pharmaceutical, Cosmetics & Perfumery and Specialty Food & Beverage. PGP Glass operates two production facilities at Kosamaba and Jambusar.

At Kosamba the company produces USP Type I, II, and III glass bottles and vials for the pharmaceutical industry, Type III glass bottles for cosmetics & perfumery industry and also feeder-coloured bottles in various shades. It has a dedicated facility for Type-I borosilicate glass for moulded pharmaceutical glass packaging and a dedicated facility for premium cosmetics and perfumery glass bottles.

At its Jambusar facility it has one of the world's largest single installed capacities for pharmaceutical packaging in amber. At this facility the company produces type III amber glass bottles and vials for pharmaceutical industry and type III flint bottles for cosmetics and perfumery, as

well as the speciality food and beverages industry.

Says Vijay Shah, Director of PGP Glass: “We offer the complete end-to-end glass packaging solutions in over 50 countries under the globally recognized brand name of ‘PGP Glass.’ We have our design, production and decoration footprint in both India and Sri Lanka with an overall capacity of 1,530 tonnes per day thanks to 11 furnaces and 64 production lines. Our manufacturing facilities provide the best in class configuration in terms of technology, design and layout to serve our global customer requirements. We have offices and warehousing facilities in France, Germany, Turkey, Spain, Brazil, India, UAE, UK and Sri Lanka. We offer an entire range of glass packaging (flaconage) solutions under one umbrella - making us a one-stop-shop for global industry requirements. We have world-class, in-house bottle and mould design capabilities, creative design & innovation studio, state-of-the-art CNC machine workshops for mould manufacturing and dedicated facilities for premium glass decoration solutions such as printing, hot-foil stamping, coating, frosting, decal, fitment gluing and metallization.” ■



# Glass Industry



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