

Brewing expansion accelerates container glass industry in MEXICO

Strong beer production growth and export dominance continue to drive container glass demand across MEXICO, supported by capacity expansions, recycling initiatives and major industry investments. Upcoming global events are expected to further accelerate consumption trends, reinforcing long-term opportunities for glass manufacturers serving the beer sector.

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A population of 133 million, high per-capita beer consumption and rising disposable income have turned Mexico into a beer production hotspot in Latin America. This momentum has driven a surge in container glass production and consumption over the past fifteen years, closely tied to the needs of the beer industry.

A BEER HOTSPOT

Characterised by strong per-capita consumption, high production volumes and deep cultural integra-





tion, Mexico’s beer industry ranks among the most dynamic globally. The country is the world’s largest beer exporter, the fourth-largest producer, and a leading consumption market, creating significant opportunities for container glass manufacturers. In 2025, Mexico produced an estimated 142 million hectolitres of beer. Exports account for a substantial share of this output, with the country consistently leading global beer exports since 2010, surpassing established exporters such as the Netherlands, Belgium, and Germany. Capacity expansions announced by brewers reinforce long-term demand for container glass. Heineken has committed to a new brewery in Kanasín, Yucatán, with a capacity of 4 million hectolitres, expected

to begin operations in 2027. Meanwhile, Grupo Modelo has announced investments exceeding USD 3.6 billion to expand production capacity.

PACKAGING CHOICES FOR BEER INDUSTRY IN MEXICO

Packaging has become a strategic consideration for brewers, balancing operational efficiency with environmental goals. Producers are increasingly seeking solutions aligned with circular economy principles without compromising productivity. Container glass remains the dominant packaging format for beer in Mexico. Although recyclable cans and alternative bottles have gained some traction over the past decade, their share remains limited.

Returnable glass systems are deeply embedded in consumer behavior, with many customers routinely returning bottles for refill. Standard bottle sizes are typically 325 ml, 940 ml, and 1-litre also available across select brands.

CONTAINER GLASS INDUSTRY

Growth in Mexico’s container glass industry over the past two decades has been remarkable, outpacing regional peers across the Americas. This expansion is closely linked to rising beer production, which continues to generate strong and sustained demand for glass packaging.

O-I

O-I Glass is a major player in Mexico, operating six production plants. Its growth strategy has combined organic expansion with acquisitions, notably the 2015 purchase of Vitro’s food and beverage glass container business for approximately USD 2.15 billion. This

transaction included five plants in Mexico and one in Bolivia. In 2019, O-I further strengthened its position by acquiring Nueva Fanal from Grupo Modelo. Located near Mexico City, the facility operates four furnaces and produces around 300,000 tonnes of glass containers annually, primarily supplying brands such as Corona, Modelo Especial and Pacifico.

GRUPO MODELO

As a subsidiary of AB InBev since 2013, Grupo Modelo is both a major brewer and a significant container glass producer. Its three glass plants -located in San Luis Potosí, Mexico City, and Tierra Blanca- collectively produce 15 million bottles per day, meeting most internal demand. A USD 154M expansion at the Tierra Blanca facility back in 2022 increased daily capacity from 3.5 million to 5.5 million bottles, equivalent to 1.4 billion bottles annually. Grupo Modelo accounts for more than half of Mexico's beer output and operates 11 breweries alongside vertically integrated facilities, including glass production.



FEVISA INDUSTRIAL

Fevisa Industrial has supplied container glass to the beer industry since 1987. It operates two plants: one in Mexicali serving export markets and another in San Luis Potosí focused on domestic demand.

SIVESA

Owned by Crown Holdings, Sivesa is among Mexico's oldest glass producers. Its Veracruz facility, operational since 1975, has a capacity of 360 tonnes per day. Following Crown's acquisition of Heineken's packaging division Empaque in 2015, a new plant was established in Meoqui, Chihuahua, in 2018 with a capacity of 450 tonnes per day, supplying Heineken breweries. In 2025, the Veracruz facility underwent a major furnace repair project, modernising its 375-tonne-per-day furnace while maintaining its original design.

SAVERGLASS

Saverglass, though focused on premium wine and spirits, operates a modern facility in Acatlán de Juárez near Guadalajara. Since entering Mexico in 2018, it has contributed to the country's high-end glass packaging segment.

EMPHASIS ON GLASS RECYCLING

Recycling initiatives are central to reducing costs and carbon footprints. In 2024, O-I Mexico partnered with SILICE to launch a recycling hub in Chihuahua,

processing 300 tonnes of glass monthly for reuse in production. Grupo Modelo has also made significant progress, recovering more than one billion bottles since 2017 and reintegrating 18,000 tonnes of recycled glass in 2025. Over 88 percent of its products are distributed in returnable or recycled packaging. The company reports that 34 percent of its glass containers are made from recycled materials, while 51 percent are reusable. To address losses in the return system, Grupo Modelo introduced the 'Every Bottle Counts' programme to recover bottles across the value chain.

FIFA WORLD CUP 2026 IMPACT ON BEER AND CONTAINER GLASS INDUSTRY

The 2026 FIFA World Cup, co-hosted by Mexico, the United States and Canada, is expected to boost beer consumption significantly. Scheduled from June 11 to July 19 across 16 cities, the event is projected to attract 6.5 million spectators. According to Barclays, previous tournaments have consistently driven beer demand. South Africa 2010 saw a 6.1 percent increase during the event, Brazil 2014 recorded a similar rebound alongside a 140-million-litre sales rise for AB InBev, and Qatar 2022 posted a 9.9 percent increase despite regulatory constraints. Comparable trends are anticipated in 2026, reinforcing demand for container glass. ■