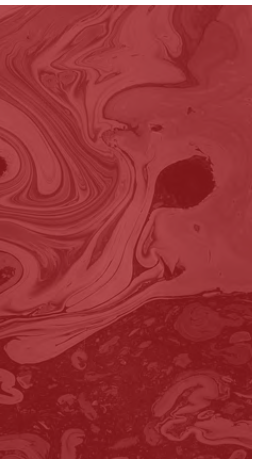
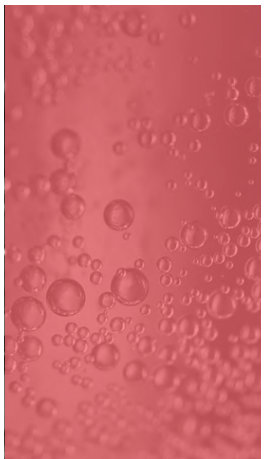
Glass





3.5 Glass

Glass manufacturing is a $27.6 billion sector of the U.S. economy, employing more than 93,000 workers. U.S. glass manufacturing creates over 16.5 million tons per year of glass products.[362] The majority of glass produced is container glass, followed by flat glass and glass wool.

Glass manufacturing emits around 15 MMT CO_2e/year (including emissions from offsite generation), with process heating accounting for the most direct emissions (***Figure 22***).[363] Like cement, glass production requires high temperature heat, primarily for the

initial batch processing stage in large furnaces. These furnaces are mostly fueled by natural gas (***Figure 23***).[364]

Figure 22: Glass sector sources of GHG emissions in 2018, by major end use. Source: U.S. DOE, Manufacturing Energy and Carbon Footprint: Glass Sector.

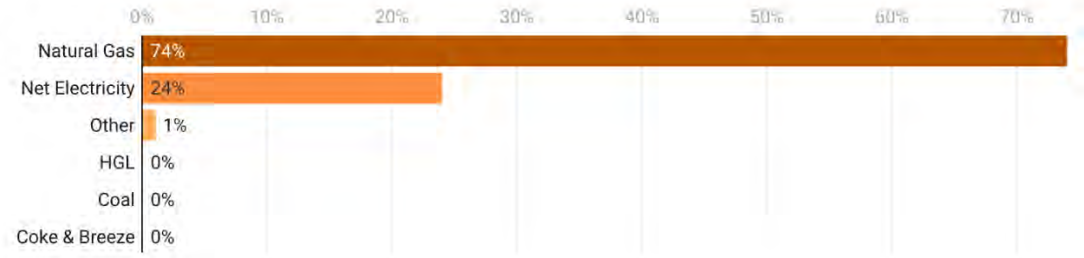
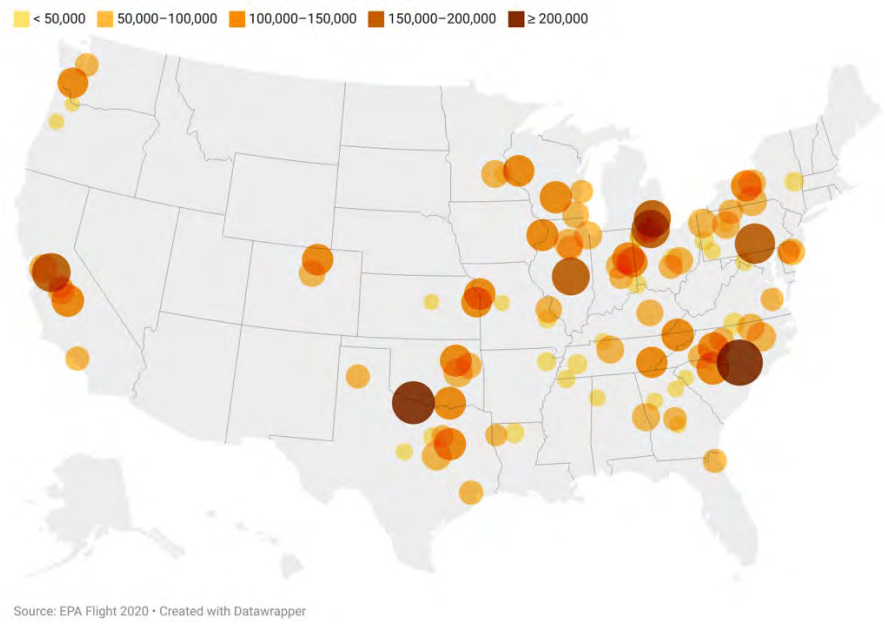


Figure 23: Glass manufacturing sector fuel and non-fuel uses of energy in 2018 (as a percentage of total trillion Btu). Source: U.S. EIA, MECS 2018, Table 1.2.

Like cement, glass manufacturing is highly dispersed (***Figure 24***).[365]



State	Total GHG Emissions	Facilities
NC	671,255	7
TX	663,636	8
OH	593,069	10
CA	574,788	9
PA	512,974	10
IL	409,927	5
OK	395,346	5
IN	383,488	5
TN	377,870	6
WI	358,728	4

Figure 24: Location and total reported emissions (metric tons CO_2e) of glass manufacturing plants in the United States (left). Top 10 states by total GHG emissions from glass facilities (right table). Size and darkness of bubbles scale with level of emissions. Source: U.S. EPA, FLIGHT.

Several large glass producers have established sustainability targets or made significant efforts in improving energy efficiency aimed towards reducing emissions in their manufacturing processes. Gentex Corp, which employs about 5,000 people in Michigan, has established goals to reduce its GHG emissions 15 percent below 2020 levels by 2026, 40 percent by 2031, 70 percent by 2041, and achieve carbon neutrality by 2049. Some of the strategies being employed by Gentex include environmental management systems based on ISO 14001 standards, waste reduction policies, and multiple process-based energy efficiency improvements in manufacturing. [366] Pella Corp, which employs over 2,200 people in Iowa, is a volunteer partner in the ENERGY STAR program and is a member of the U.S. Green Building Council. [367]

State procurement policies can incentivize the decarbonization of glass manufacturing by creating a market for glass with less embodied emissions. For example, **California's** Buy Clean policy has established a maximum acceptable carbon intensity of 1.43 metric tons of CO_2e per metric ton for flat glass used in public works projects. [368] Policies that encourage the electrification of furnaces, general energy efficiency, and that establish emissions targets for industrial sectors as a whole also have the potential to help reduce emissions from glass. Examples include **Colorado's** target for the industrial sector to reduce emissions by 20 percent by 2030 from a 2015 baseline, **Delaware's** Energy Efficiency Industrial (E2I) program, and energy management programs in **Oregon**, **New York, Louisiana,** and elsewhere. [369, 370]

Table 12 describes additional state actions that can help overcome persistent barriers and challenges in the glass industry.

Table 12: Decarbonization barriers and policy opportunities in the glass industry.

Challenge / Barrier	State Opportunities	Policy Connections
Long equipment lifetimes / few opportunities to change capital	• Infrastructure investments, incentives will be needed to replace incumbent technology	• Mandates, incentives, rebates, efficiency standards, energy managers, and energy audits all can reduce the capital barriers associated with long technology lifetimes
R&D is needed to spur innovation and adoption of decarbonization technology options	• Electrification of large, high-temperature furnaces, CCUS, and carbon-neutral feedstocks will be essential to decarbonizing glass	• State funds leveraged with federal funds in R&D can help bridge the gap between innovative options and commercial viability in industrial facilities
Emerging efficiency improving technologies need to be implemented	• Variable speed drive motors, new grinding technologies, process and compressor controls	• Incentives and rebates for replacing old technology with new controls, process optimizing technology
Circularity and recyclability of glass is an untapped decarbonization pathway	• Some 75 percent of container glass has potential to be recycled	• Procurement of recycled glass for state infrastructure projects • Incentives for glass manufacturers that do onsite recycling or private companies that buy recycled glass

Roadmaps for the Glass Industry

- UK Roadmap for Glass (2015)
- UK Roadmap for Glass (Appendices) (2015)

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