

# Global Automatic Stretch Blow Molding Machine Supply, Demand and Key Producers, 2026-2032

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## Abstracts

The global Automatic Stretch Blow Molding Machine market size is expected to reach \$ 2720 million by 2032, rising at a market growth of 5.2% CAGR during the forecast period (2026-2032).

Automatic Stretch Blow Molding Machine refers to fully automated equipment that converts thermoplastic preforms, primarily PET and recycled PET preforms, into hollow bottles or containers through controlled reheating, axial stretching, pre-blowing, and high-pressure radial blowing. A typical machine integrates a preform feeding system, heating oven, transfer mechanism, stretch rods, blow-molding stations, molds, high-pressure air circuit, servo drives, inspection components, and automated process controls. Key technical parameters include cavity count, production output, applicable bottle volume, maximum container dimensions, heating configuration, stretching accuracy, blowing pressure, compressed-air consumption, power consumption, mold-change time, and production efficiency. The Automatic Stretch Blow Molding Machine market covers linear and rotary equipment supplied as stand-alone machines or integrated with filling, capping, labeling, and inspection systems. The equipment is primarily used to manufacture containers for bottled water, carbonated beverages, juices, dairy products, edible oils, sauces, liquid foods, household products, and personal care products, with specialized configurations available for hot-fill, aseptic, large-format, oval, and other complex container applications.

## Key Findings

Automatic Stretch Blow Molding Machine converts reheated preforms into biaxially oriented bottles through fully automated stretching and blowing cycles

Rotary machines address high-output production while linear systems support flexible low- and medium-output applications

PET and rPET beverage containers remain the principal application direction for automatic stretch blow molding equipment

Energy consumption, compressed-air efficiency, bottle quality, and format flexibility are central equipment-selection criteria

Hot-fill, aseptic, large-format, and integrated blow-fill-cap systems support higher-value equipment configurations

## Market Trends

The Automatic Stretch Blow Molding Machine market is shifting toward higher output per cavity, lower energy and compressed-air consumption, broader use of recycled materials, and more intelligent process control. Modern machines increasingly use servo-controlled stretching, low-dead-volume blowing valves, optimized preform heating, air-recovery systems, and real-time monitoring to stabilize material distribution and reduce production losses. Equipment suppliers are also expanding machine compatibility with lightweight PET, high-percentage rPET, refillable PET, opaque preforms, and containers with complex shapes. Stand-alone machines continue to serve plants requiring flexible line layouts, while integrated blow-fill-cap or blow-label-fill blocks are gaining importance where customers seek reduced floor space, fewer bottle-transfer steps, lower contamination risk, and simplified line management. Advanced suppliers are beginning to introduce alternative heating technologies, including laser-based preform heating, while electrical mold heating is being applied to heat-resistant bottles for hot-filled beverages. The long-term direction is toward digitally controlled equipment capable of adapting blowing parameters to preform conditions, container designs, production speeds, and material variability with less manual intervention.

## Market Dynamics

### Drivers

Demand for Automatic Stretch Blow Molding Machine is supported by the continued use

of lightweight plastic containers in beverages, liquid foods, edible oils, household products, and personal care applications. Beverage and packaging manufacturers increasingly produce bottles directly adjacent to filling lines to reduce empty-container transportation, warehousing requirements, handling losses, and contamination exposure. Investment is also driven by the need to increase line output, reduce bottle weight, process recycled PET, and maintain consistent wall-thickness distribution at higher production speeds. Integration with filling and capping systems improves wet-end efficiency and allows manufacturers to manage bottle production and product filling as one synchronized process. Growth in packaged water, soft drinks, juices, dairy beverages, and other liquid consumer products therefore supports both new equipment installations and replacement demand for faster, more energy-efficient generations of stretch blow molding equipment.

## **Restraints**

Market development is restrained by high initial equipment investment, mold costs, compressed-air requirements, energy consumption, and the technical complexity of maintaining stable bottle quality. High-speed rotary machines require reliable preform feeding, uniform heating, precise stretching, fast valve response, stable high-pressure air supply, and accurate transfer synchronization. Variations in preform dimensions, resin characteristics, recycled-material content, ambient conditions, and bottle design can affect material distribution and increase the need for process adjustment. Each new bottle format may require molds, neck-handling components, recipes, validation, and changeover work, increasing the total cost of product diversification. Smaller manufacturers may find it difficult to achieve sufficient machine utilization to justify high-capacity equipment, while plants in regions with limited technical service infrastructure may face higher maintenance and downtime risks.

## **Opportunities**

Market opportunities are emerging from the transition toward lightweight containers, higher recycled-PET content, refillable packaging, aseptic production, hot-fill bottles, large-format containers, and differentiated container shapes. Equipment suppliers can create value through heating systems that accommodate variable preform characteristics, intelligent controls that automatically optimize the blowing window, and air-recovery technologies that reduce utility costs. Flexible machines capable of handling multiple bottle volumes and frequent format changes are attractive to contract packers and manufacturers with diversified product portfolios. Large containers, wide-

neck packaging, oval bottles, heat-resistant containers, and containers for sensitive beverages require specialized heating, stretching, mold, and sterilization configurations, supporting higher-value engineering projects. Retrofit services also represent an opportunity as installed machines can be upgraded with new controls, inspection systems, heating modules, air-recovery systems, and energy-saving components rather than being fully replaced.

## Challenges

The Automatic Stretch Blow Molding Machine industry must continuously balance output speed, material reduction, bottle strength, visual quality, process stability, and operating cost. Lightweight bottles have narrower processing windows, while rPET content can introduce greater variability in color, thermal response, intrinsic viscosity, and preform behavior. At high production speeds, small deviations in heating, stretching, pressure timing, mold temperature, or cooling can cause uneven wall thickness, base deformation, stress concentration, or unstable top-load performance. Machine builders must also ensure rapid changeovers, operator safety, hygienic design, cybersecurity of connected controls, spare-parts availability, and long-term technical service. Integrated lines create additional coordination requirements because interruptions in blowing, filling, labeling, or capping can influence the performance of the entire production block. Sustained competitiveness therefore depends on combining mechanical engineering, container design, material expertise, automation software, process validation, and global lifecycle support.

## Industry Chain Analysis

The upstream industry chain for Automatic Stretch Blow Molding Machine includes PET and rPET preforms, engineering plastics, infrared lamps or advanced heating sources, blow molds, high-pressure valves, stretching assemblies, servo motors, drives, compressors, air-recovery components, sensors, machine-vision systems, programmable controllers, safety systems, and precision-machined structural parts. Preform quality and mold precision directly influence bottle geometry and material distribution, while heating, stretching, and pneumatic components determine cycle speed, repeatability, and utility consumption. High-pressure air compressors and associated treatment systems represent an important part of plant investment and operating cost. As bottle weight decreases and recycled-material usage rises, upstream suppliers must provide more accurate temperature control, faster actuators, improved

inspection capability, and components capable of operating reliably at higher cycles per cavity.

The midstream segment covers machine design, heating and blowing process development, mold engineering, equipment manufacturing, software configuration, system integration, bottle validation, installation, commissioning, training, retrofit, and after-sales support. Value creation increasingly comes from reducing air and electricity use, shortening format changes, stabilizing bottle quality, processing lightweight or recycled preforms, and integrating blowing with filling, capping, labeling, or sterilization. Downstream customers include beverage producers, bottled-water companies, dairy processors, edible-oil and sauce manufacturers, liquid-food companies, household chemical producers, personal care brands, and contract packaging businesses. The economic value of the equipment is realized through on-site conversion of compact preforms into finished containers immediately before filling, reducing empty-bottle logistics while enabling packaging customization and high-speed production.

## Segment Insights

By machine structure, linear Automatic Stretch Blow Molding Machine models primarily serve small and medium production requirements where format flexibility, accessibility, lower investment, and straightforward operation are important. Current linear industrial systems can cover container sizes from small bottles to multi-liter formats and outputs extending into the lower tens of thousands of bottles per hour. Rotary machines use multiple continuously operating blowing stations and are designed for medium-to-high-output production. Depending on bottle size, machine configuration, and cavity count, commercial rotary portfolios extend from compact models with a few cavities to systems producing tens of thousands of containers per hour, while selected high-speed platforms exceed 100,000 containers per hour.

By system configuration, stand-alone machines provide layout flexibility and can be connected to existing filling lines, while integrated blow-fill-cap systems reduce conveying stages, footprint, empty-bottle handling, and potential contamination points. Standard cold-mold machines account for conventional water, carbonated drink, and general beverage bottles, whereas heat-resistant systems use higher preform-heating capability and heated molds for hot-fill and pasteurizable packaging. Aseptic machines integrate preform or bottle decontamination with controlled blowing and filling environments. Large-format, preferential-heating, wide-neck, and complex-shape configurations form specialized segments in which bottle design and process

engineering carry greater value than nominal machine output alone.

## **Downstream Market Opportunities**

The largest addressable downstream field for Automatic Stretch Blow Molding Machine remains liquid packaging, particularly bottled water, carbonated soft drinks, juices, teas, isotonic beverages, dairy drinks, edible oils, and sauces. Water and mainstream beverages emphasize high speed, bottle lightweighting, low energy consumption, and stable production efficiency, while juices, teas, and sensitive drinks may require hot-fill or aseptic configurations. Dairy and opaque beverages place greater demands on preform heating and material distribution, and edible oils or sauces require container stability, anti-drip filling compatibility, and diversified bottle shapes. Household cleaning and personal care products provide additional opportunities for oval, flat, handled, or visually differentiated containers produced with preferential-heating technology. Contract packaging businesses and regional beverage producers also create demand for machines offering rapid mold change, broad bottle-volume coverage, and economical operation across shorter production runs.

## **Regional Insights**

Europe remains an important technology and equipment supply center for Automatic Stretch Blow Molding Machine, supported by established manufacturers with expertise in high-speed rotary equipment, integrated bottling blocks, hot-fill systems, aseptic processing, container design, and energy-efficient operation. European suppliers generally compete in global projects requiring high throughput, line integration, advanced process controls, and comprehensive lifecycle service. The region also has a broad base of medium-capacity and specialized equipment manufacturers addressing flexible beverage, food, household, and personal care packaging applications.

Asia Pacific combines expanding packaged-consumer-goods production with growing regional equipment-manufacturing capabilities. China has developed domestic high-speed rotary machine platforms and turnkey beverage-line capabilities, creating competition in both local and international projects. Demand across developing Asian markets is influenced by new beverage capacity, bottled-water consumption, local production of containers, and replacement of semi-automatic or lower-speed equipment. North America represents an important replacement and modernization market, where customers emphasize operational efficiency, recycled-material processing, packaging

innovation, maintenance support, and compatibility with existing filling infrastructure. Regional purchasing decisions differ mainly in required capacity, capital budgets, utility costs, local service availability, and the degree of line integration.

## **Competitive Landscape Analysis**

The Automatic Stretch Blow Molding Machine market is characterized by competition among global beverage-processing equipment groups, specialized stretch blow molding manufacturers, integrated packaging-line suppliers, and regional machinery companies. Global suppliers generally differentiate through high output per cavity, advanced heating and stretching technologies, bottle and preform design expertise, compatibility with rPET, integrated blow-fill-cap platforms, aseptic and hot-fill capabilities, digital process controls, and international service networks. Specialized manufacturers compete through flexible machine ranges, rapid mold change, lower capital requirements, customized container solutions, and strong performance in selected output or bottle-size categories. Chinese and other regional suppliers are strengthening their positions through cost competitiveness, localized engineering, turnkey project capability, and faster response to domestic customers. Competition is moving beyond nominal bottles-per-hour ratings toward total cost of ownership, compressed-air and electricity consumption, material lightweighting, line efficiency, production flexibility, digital monitoring, maintenance requirements, and lifecycle support. Suppliers able to combine machine hardware with bottle development, mold engineering, preform evaluation, process optimization, inspection, and retrofit services are better positioned in technically demanding projects.

## **Report Scope**

This report studies the global Automatic Stretch Blow Molding Machine production, demand, key manufacturers, and key regions.

This report is a detailed and comprehensive analysis of the world market for Automatic Stretch Blow Molding Machine and provides market size (US\$ million) and Year-over-Year (YoY) Growth, considering 2025 as the base year. This report explores demand trends and competition, as well as details the characteristics of Automatic Stretch Blow Molding Machine that contribute to its increasing demand across many markets.

## Highlights and key features of the study

Global Automatic Stretch Blow Molding Machine total production and demand, 2021-2032, (K Units)

Global Automatic Stretch Blow Molding Machine total production value, 2021-2032, (USD Million)

Global Automatic Stretch Blow Molding Machine production by region & country, production, value, CAGR, 2021-2032, (USD Million) & (K Units), (based on production site)

Global Automatic Stretch Blow Molding Machine consumption by region & country, CAGR, 2021-2032 & (K Units)

U.S. VS China: Automatic Stretch Blow Molding Machine domestic production, consumption, key domestic manufacturers and share

Global Automatic Stretch Blow Molding Machine production by manufacturer, production, price, value and market share 2021-2026, (USD Million) & (K Units)

Global Automatic Stretch Blow Molding Machine production by Type, production, value, CAGR, 2021-2032, (USD Million) & (K Units)

Global Automatic Stretch Blow Molding Machine production by Application, production, value, CAGR, 2021-2032, (USD Million) & (K Units)

This report profiles key players in the global Automatic Stretch Blow Molding Machine market based on the following parameters - company overview, production, value, price, gross margin, product portfolio, geographical presence, and key developments. Key companies covered as a part of this study include Krones AG, Sidel Group, KHS GmbH, SACMI Imola S.C., SMI S.p.A., SIPA S.p.A., Urola Solutions S. Coop., Meccanoplastica S.r.l., NISSEI ASB MACHINE CO., LTD., Aoki Technical Laboratory, Inc., etc.

This report also provides key insights about market drivers, restraints, opportunities, new product launches or approvals.

Stakeholders would have ease in decision-making through various strategy matrices used in analyzing the World Automatic Stretch Blow Molding Machine market

## **Detailed Segmentation:**

Each section contains quantitative market data including market by value (US\$ Millions), volume (production, consumption) & (K Units) and average price (K US\$/Unit) by manufacturer, by Type, and by Application. Data is given for the years 2021-2032 by year with 2025 as the base year, 2026 as the estimate year, and 2027-2032 as the forecast year.

## **Global Automatic Stretch Blow Molding Machine Market, By Region:**

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

## **Market Segmentation**

### **Global Automatic Stretch Blow Molding Machine Market, Segmentation by Type:**

Linear Automatic Stretch Blow Molding Machine

Rotary Automatic Stretch Blow Molding Machine

## **Global Automatic Stretch Blow Molding Machine Market, Segmentation by Molding Process Types:**

One-step Injection Stretch Blow Molding Machine

1.5-step Injection Stretch Blow Molding Machine

Two-step Reheat Stretch Blow Molding Machine

## **Global Automatic Stretch Blow Molding Machine Market, Segmentation by Rated Output Types Based on 20.6 L PET Bottles:**

Low Output Automatic Stretch Blow Molding Machine (<6,000 Bottles/Hour)

Medium Output Automatic Stretch Blow Molding Machine (6,000–20,000 Bottles/Hour)

High Output Automatic Stretch Blow Molding Machine (>20,000 Bottles/Hour)

## **Global Automatic Stretch Blow Molding Machine Market, Segmentation by Application:**

Food & Beverage Industry

Water Packaging

Edible Oil

Others

## Companies Profiled:

Krones AG

Sidel Group

KHS GmbH

SACMI Imola S.C.

SMI S.p.A.

SIPA S.p.A.

Urola Solutions S. Coop.

Meccanoplastica S.r.l.

NISSEI ASB MACHINE CO., LTD.

Aoki Technical Laboratory, Inc.

CHUMPOWER MACHINERY CORP.

Guangzhou Tech-Long Packaging Machinery Co., Ltd.

Jiangsu Newamstar Packaging Machinery Co., Ltd.

Demark Holding Group Co., Ltd.

Powerjet Plastic Machinery Co., Ltd.

## Key Questions Answered:

1. How big is the global Automatic Stretch Blow Molding Machine market?
2. What is the demand of the global Automatic Stretch Blow Molding Machine market?
3. What is the year over year growth of the global Automatic Stretch Blow Molding

Machine market?

4. What is the production and production value of the global Automatic Stretch Blow Molding Machine market?
5. Who are the key producers in the global Automatic Stretch Blow Molding Machine market?
6. What are the growth factors driving the market demand?

## Contents

### 1 SUPPLY SUMMARY

- 1.1 Automatic Stretch Blow Molding Machine Introduction
- 1.2 World Automatic Stretch Blow Molding Machine Supply & Forecast
  - 1.2.1 World Automatic Stretch Blow Molding Machine Production Value (2021 & 2025 & 2032)
  - 1.2.2 World Automatic Stretch Blow Molding Machine Production (2021-2032)
  - 1.2.3 World Automatic Stretch Blow Molding Machine Pricing Trends (2021-2032)
- 1.3 World Automatic Stretch Blow Molding Machine Production by Region (Based on Production Site)
  - 1.3.1 World Automatic Stretch Blow Molding Machine Production Value by Region (2021-2032)
  - 1.3.2 World Automatic Stretch Blow Molding Machine Production by Region (2021-2032)
  - 1.3.3 World Automatic Stretch Blow Molding Machine Average Price by Region (2021-2032)
  - 1.3.4 North America Automatic Stretch Blow Molding Machine Production (2021-2032)
  - 1.3.5 Europe Automatic Stretch Blow Molding Machine Production (2021-2032)
  - 1.3.6 China Automatic Stretch Blow Molding Machine Production (2021-2032)
  - 1.3.7 Japan Automatic Stretch Blow Molding Machine Production (2021-2032)
- 1.4 Market Drivers, Restraints and Trends
  - 1.4.1 Automatic Stretch Blow Molding Machine Market Drivers
  - 1.4.2 Factors Affecting Demand
  - 1.4.3 Automatic Stretch Blow Molding Machine Major Market Trends

### 2 DEMAND SUMMARY

- 2.1 World Automatic Stretch Blow Molding Machine Demand (2021-2032)
- 2.2 World Automatic Stretch Blow Molding Machine Consumption by Region
  - 2.2.1 World Automatic Stretch Blow Molding Machine Consumption by Region (2021-2026)
  - 2.2.2 World Automatic Stretch Blow Molding Machine Consumption Forecast by Region (2027-2032)
- 2.3 United States Automatic Stretch Blow Molding Machine Consumption (2021-2032)
- 2.4 China Automatic Stretch Blow Molding Machine Consumption (2021-2032)
- 2.5 Europe Automatic Stretch Blow Molding Machine Consumption (2021-2032)
- 2.6 Japan Automatic Stretch Blow Molding Machine Consumption (2021-2032)

2.7 South Korea Automatic Stretch Blow Molding Machine Consumption (2021-2032)

2.8 ASEAN Automatic Stretch Blow Molding Machine Consumption (2021-2032)

2.9 India Automatic Stretch Blow Molding Machine Consumption (2021-2032)

### **3 WORLD MANUFACTURERS COMPETITIVE ANALYSIS**

3.1 World Automatic Stretch Blow Molding Machine Production Value by Manufacturer (2021-2026)

3.2 World Automatic Stretch Blow Molding Machine Production by Manufacturer (2021-2026)

3.3 World Automatic Stretch Blow Molding Machine Average Price by Manufacturer (2021-2026)

3.4 Automatic Stretch Blow Molding Machine Company Evaluation Quadrant

3.5 Industry Rank and Concentration Rate (CR)

3.5.1 Global Automatic Stretch Blow Molding Machine Industry Rank of Major Manufacturers

3.5.2 Global Concentration Ratios (CR4) for Automatic Stretch Blow Molding Machine in 2025

3.5.3 Global Concentration Ratios (CR8) for Automatic Stretch Blow Molding Machine in 2025

3.6 Automatic Stretch Blow Molding Machine Market: Overall Company Footprint Analysis

3.6.1 Automatic Stretch Blow Molding Machine Market: Region Footprint

3.6.2 Automatic Stretch Blow Molding Machine Market: Company Product Type Footprint

3.6.3 Automatic Stretch Blow Molding Machine Market: Company Product Application Footprint

3.7 Competitive Environment

3.7.1 Historical Structure of the Industry

3.7.2 Barriers of Market Entry

3.7.3 Factors of Competition

3.8 New Entrant and Capacity Expansion Plans

3.9 Mergers, Acquisition, Agreements, and Collaborations

### **4 UNITED STATES VS CHINA VS REST OF THE WORLD**

4.1 United States VS China: Automatic Stretch Blow Molding Machine Production Value Comparison

4.1.1 United States VS China: Automatic Stretch Blow Molding Machine Production

## Value Comparison (2021 & 2025 & 2032)

4.1.2 United States VS China: Automatic Stretch Blow Molding Machine Production Value Market Share Comparison (2021 & 2025 & 2032)

4.2 United States VS China: Automatic Stretch Blow Molding Machine Production Comparison

4.2.1 United States VS China: Automatic Stretch Blow Molding Machine Production Comparison (2021 & 2025 & 2032)

4.2.2 United States VS China: Automatic Stretch Blow Molding Machine Production Market Share Comparison (2021 & 2025 & 2032)

4.3 United States VS China: Automatic Stretch Blow Molding Machine Consumption Comparison

4.3.1 United States VS China: Automatic Stretch Blow Molding Machine Consumption Comparison (2021 & 2025 & 2032)

4.3.2 United States VS China: Automatic Stretch Blow Molding Machine Consumption Market Share Comparison (2021 & 2025 & 2032)

4.4 United States Based Automatic Stretch Blow Molding Machine Manufacturers and Market Share, 2021-2026

4.4.1 United States Based Automatic Stretch Blow Molding Machine Manufacturers, Headquarters and Production Site (States, Country)

4.4.2 United States Based Manufacturers Automatic Stretch Blow Molding Machine Production Value (2021-2026)

4.4.3 United States Based Manufacturers Automatic Stretch Blow Molding Machine Production (2021-2026)

4.5 China Based Automatic Stretch Blow Molding Machine Manufacturers and Market Share

4.5.1 China Based Automatic Stretch Blow Molding Machine Manufacturers, Headquarters and Production Site (Province, Country)

4.5.2 China Based Manufacturers Automatic Stretch Blow Molding Machine Production Value (2021-2026)

4.5.3 China Based Manufacturers Automatic Stretch Blow Molding Machine Production (2021-2026)

4.6 Rest of World Based Automatic Stretch Blow Molding Machine Manufacturers and Market Share, 2021-2026

4.6.1 Rest of World Based Automatic Stretch Blow Molding Machine Manufacturers, Headquarters and Production Site (State, Country)

4.6.2 Rest of World Based Manufacturers Automatic Stretch Blow Molding Machine Production Value (2021-2026)

4.6.3 Rest of World Based Manufacturers Automatic Stretch Blow Molding Machine Production (2021-2026)

## **5 MARKET ANALYSIS BY TYPE**

5.1 World Automatic Stretch Blow Molding Machine Market Size Overview by Type:  
2021 VS 2025 VS 2032

5.2 Segment Introduction by Type

5.2.1 Linear Automatic Stretch Blow Molding Machine

5.2.2 Rotary Automatic Stretch Blow Molding Machine

5.3 Market Segment by Type

5.3.1 World Automatic Stretch Blow Molding Machine Production by Type (2021-2032)

5.3.2 World Automatic Stretch Blow Molding Machine Production Value by Type  
(2021-2032)

5.3.3 World Automatic Stretch Blow Molding Machine Average Price by Type  
(2021-2032)

## **6 MARKET ANALYSIS BY MOLDING PROCESS TYPES**

6.1 World Automatic Stretch Blow Molding Machine Market Size Overview by Molding  
Process Types: 2021 VS 2025 VS 2032

6.2 Segment Introduction by Molding Process Types

6.2.1 One-step Injection Stretch Blow Molding Machine

6.2.2 1.5-step Injection Stretch Blow Molding Machine

6.2.3 Two-step Reheat Stretch Blow Molding Machine

6.3 Market Segment by Molding Process Types

6.3.1 World Automatic Stretch Blow Molding Machine Production by Molding Process  
Types (2021-2032)

6.3.2 World Automatic Stretch Blow Molding Machine Production Value by Molding  
Process Types (2021-2032)

6.3.3 World Automatic Stretch Blow Molding Machine Average Price by Molding  
Process Types (2021-2032)

## **7 MARKET ANALYSIS BY RATED OUTPUT TYPES BASED ON ?0.6 L PET BOTTLES**

7.1 World Automatic Stretch Blow Molding Machine Market Size Overview by Rated  
Output Types Based on ?0.6 L PET Bottles: 2021 VS 2025 VS 2032

7.2 Segment Introduction by Rated Output Types Based on ?0.6 L PET Bottles

7.2.1 Low Output Automatic Stretch Blow Molding Machine (<6,000 Bottles/Hour)

7.2.2 Medium Output Automatic Stretch Blow Molding Machine (6,000–20,000)

Bottles/Hour)

7.2.3 High Output Automatic Stretch Blow Molding Machine (>20,000 Bottles/Hour)

7.3 Market Segment by Rated Output Types Based on 0.6 L PET Bottles

7.3.1 World Automatic Stretch Blow Molding Machine Production by Rated Output Types Based on 0.6 L PET Bottles (2021-2032)

7.3.2 World Automatic Stretch Blow Molding Machine Production Value by Rated Output Types Based on 0.6 L PET Bottles (2021-2032)

7.3.3 World Automatic Stretch Blow Molding Machine Average Price by Rated Output Types Based on 0.6 L PET Bottles (2021-2032)

## **8 MARKET ANALYSIS BY APPLICATION**

8.1 World Automatic Stretch Blow Molding Machine Market Size Overview by Application: 2021 VS 2025 VS 2032

8.2 Segment Introduction by Application

8.2.1 Food & Beverage Industry

8.2.2 Water Packaging

8.2.3 Edible Oil

8.2.4 Others

8.3 Market Segment by Application

8.3.1 World Automatic Stretch Blow Molding Machine Production by Application (2021-2032)

8.3.2 World Automatic Stretch Blow Molding Machine Production Value by Application (2021-2032)

8.3.3 World Automatic Stretch Blow Molding Machine Average Price by Application (2021-2032)

## **9 COMPANY PROFILES**

9.1 Krones AG

9.1.1 Krones AG Details

9.1.2 Krones AG Major Business

9.1.3 Krones AG Automatic Stretch Blow Molding Machine Product and Services

9.1.4 Krones AG Automatic Stretch Blow Molding Machine Production, Price, Value, Gross Margin and Market Share (2021-2026)

9.1.5 Krones AG Recent Developments/Updates

9.1.6 Krones AG Competitive Strengths & Weaknesses

9.2 Sidel Group

9.2.1 Sidel Group Details

- 9.2.2 Sidel Group Major Business
- 9.2.3 Sidel Group Automatic Stretch Blow Molding Machine Product and Services
- 9.2.4 Sidel Group Automatic Stretch Blow Molding Machine Production, Price, Value, Gross Margin and Market Share (2021-2026)
- 9.2.5 Sidel Group Recent Developments/Updates
- 9.2.6 Sidel Group Competitive Strengths & Weaknesses
- 9.3 KHS GmbH
  - 9.3.1 KHS GmbH Details
  - 9.3.2 KHS GmbH Major Business
  - 9.3.3 KHS GmbH Automatic Stretch Blow Molding Machine Product and Services
  - 9.3.4 KHS GmbH Automatic Stretch Blow Molding Machine Production, Price, Value, Gross Margin and Market Share (2021-2026)
  - 9.3.5 KHS GmbH Recent Developments/Updates
  - 9.3.6 KHS GmbH Competitive Strengths & Weaknesses
- 9.4 SACMI Imola S.C.
  - 9.4.1 SACMI Imola S.C. Details
  - 9.4.2 SACMI Imola S.C. Major Business
  - 9.4.3 SACMI Imola S.C. Automatic Stretch Blow Molding Machine Product and Services
  - 9.4.4 SACMI Imola S.C. Automatic Stretch Blow Molding Machine Production, Price, Value, Gross Margin and Market Share (2021-2026)
  - 9.4.5 SACMI Imola S.C. Recent Developments/Updates
  - 9.4.6 SACMI Imola S.C. Competitive Strengths & Weaknesses
- 9.5 SMI S.p.A.
  - 9.5.1 SMI S.p.A. Details
  - 9.5.2 SMI S.p.A. Major Business
  - 9.5.3 SMI S.p.A. Automatic Stretch Blow Molding Machine Product and Services
  - 9.5.4 SMI S.p.A. Automatic Stretch Blow Molding Machine Production, Price, Value, Gross Margin and Market Share (2021-2026)
  - 9.5.5 SMI S.p.A. Recent Developments/Updates
  - 9.5.6 SMI S.p.A. Competitive Strengths & Weaknesses
- 9.6 SIPA S.p.A.
  - 9.6.1 SIPA S.p.A. Details
  - 9.6.2 SIPA S.p.A. Major Business
  - 9.6.3 SIPA S.p.A. Automatic Stretch Blow Molding Machine Product and Services
  - 9.6.4 SIPA S.p.A. Automatic Stretch Blow Molding Machine Production, Price, Value, Gross Margin and Market Share (2021-2026)
  - 9.6.5 SIPA S.p.A. Recent Developments/Updates
  - 9.6.6 SIPA S.p.A. Competitive Strengths & Weaknesses

## 9.7 Urola Solutions S. Coop.

### 9.7.1 Urola Solutions S. Coop. Details

### 9.7.2 Urola Solutions S. Coop. Major Business

### 9.7.3 Urola Solutions S. Coop. Automatic Stretch Blow Molding Machine Product and Services

### 9.7.4 Urola Solutions S. Coop. Automatic Stretch Blow Molding Machine Production, Price, Value, Gross Margin and Market Share (2021-2026)

### 9.7.5 Urola Solutions S. Coop. Recent Developments/Updates

### 9.7.6 Urola Solutions S. Coop. Competitive Strengths & Weaknesses

## 9.8 Meccanoplastica S.r.l.

### 9.8.1 Meccanoplastica S.r.l. Details

### 9.8.2 Meccanoplastica S.r.l. Major Business

### 9.8.3 Meccanoplastica S.r.l. Automatic Stretch Blow Molding Machine Product and Services

### 9.8.4 Meccanoplastica S.r.l. Automatic Stretch Blow Molding Machine Production, Price, Value, Gross Margin and Market Share (2021-2026)

### 9.8.5 Meccanoplastica S.r.l. Recent Developments/Updates

### 9.8.6 Meccanoplastica S.r.l. Competitive Strengths & Weaknesses

## 9.9 NISSEI ASB MACHINE CO., LTD.

### 9.9.1 NISSEI ASB MACHINE CO., LTD. Details

### 9.9.2 NISSEI ASB MACHINE CO., LTD. Major Business

### 9.9.3 NISSEI ASB MACHINE CO., LTD. Automatic Stretch Blow Molding Machine Product and Services

### 9.9.4 NISSEI ASB MACHINE CO., LTD. Automatic Stretch Blow Molding Machine Production, Price, Value, Gross Margin and Market Share (2021-2026)

### 9.9.5 NISSEI ASB MACHINE CO., LTD. Recent Developments/Updates

### 9.9.6 NISSEI ASB MACHINE CO., LTD. Competitive Strengths & Weaknesses

## 9.10 Aoki Technical Laboratory, Inc.

### 9.10.1 Aoki Technical Laboratory, Inc. Details

### 9.10.2 Aoki Technical Laboratory, Inc. Major Business

### 9.10.3 Aoki Technical Laboratory, Inc. Automatic Stretch Blow Molding Machine Product and Services

### 9.10.4 Aoki Technical Laboratory, Inc. Automatic Stretch Blow Molding Machine Production, Price, Value, Gross Margin and Market Share (2021-2026)

### 9.10.5 Aoki Technical Laboratory, Inc. Recent Developments/Updates

### 9.10.6 Aoki Technical Laboratory, Inc. Competitive Strengths & Weaknesses

## 9.11 CHUMPOWER MACHINERY CORP.

### 9.11.1 CHUMPOWER MACHINERY CORP. Details

### 9.11.2 CHUMPOWER MACHINERY CORP. Major Business

9.11.3 CHUMPOWER MACHINERY CORP. Automatic Stretch Blow Molding Machine Product and Services

9.11.4 CHUMPOWER MACHINERY CORP. Automatic Stretch Blow Molding Machine Production, Price, Value, Gross Margin and Market Share (2021-2026)

9.11.5 CHUMPOWER MACHINERY CORP. Recent Developments/Updates

9.11.6 CHUMPOWER MACHINERY CORP. Competitive Strengths & Weaknesses

9.12 Guangzhou Tech-Long Packaging Machinery Co., Ltd.

9.12.1 Guangzhou Tech-Long Packaging Machinery Co., Ltd. Details

9.12.2 Guangzhou Tech-Long Packaging Machinery Co., Ltd. Major Business

9.12.3 Guangzhou Tech-Long Packaging Machinery Co., Ltd. Automatic Stretch Blow Molding Machine Product and Services

9.12.4 Guangzhou Tech-Long Packaging Machinery Co., Ltd. Automatic Stretch Blow Molding Machine Production, Price, Value, Gross Margin and Market Share (2021-2026)

9.12.5 Guangzhou Tech-Long Packaging Machinery Co., Ltd. Recent Developments/Updates

9.12.6 Guangzhou Tech-Long Packaging Machinery Co., Ltd. Competitive Strengths & Weaknesses

9.13 Jiangsu Newamstar Packaging Machinery Co., Ltd.

9.13.1 Jiangsu Newamstar Packaging Machinery Co., Ltd. Details

9.13.2 Jiangsu Newamstar Packaging Machinery Co., Ltd. Major Business

9.13.3 Jiangsu Newamstar Packaging Machinery Co., Ltd. Automatic Stretch Blow Molding Machine Product and Services

9.13.4 Jiangsu Newamstar Packaging Machinery Co., Ltd. Automatic Stretch Blow Molding Machine Production, Price, Value, Gross Margin and Market Share (2021-2026)

9.13.5 Jiangsu Newamstar Packaging Machinery Co., Ltd. Recent Developments/Updates

9.13.6 Jiangsu Newamstar Packaging Machinery Co., Ltd. Competitive Strengths & Weaknesses

9.14 Demark Holding Group Co., Ltd.

9.14.1 Demark Holding Group Co., Ltd. Details

9.14.2 Demark Holding Group Co., Ltd. Major Business

9.14.3 Demark Holding Group Co., Ltd. Automatic Stretch Blow Molding Machine Product and Services

9.14.4 Demark Holding Group Co., Ltd. Automatic Stretch Blow Molding Machine Production, Price, Value, Gross Margin and Market Share (2021-2026)

9.14.5 Demark Holding Group Co., Ltd. Recent Developments/Updates

9.14.6 Demark Holding Group Co., Ltd. Competitive Strengths & Weaknesses

## 9.15 Powerjet Plastic Machinery Co., Ltd.

### 9.15.1 Powerjet Plastic Machinery Co., Ltd. Details

### 9.15.2 Powerjet Plastic Machinery Co., Ltd. Major Business

### 9.15.3 Powerjet Plastic Machinery Co., Ltd. Automatic Stretch Blow Molding Machine Product and Services

### 9.15.4 Powerjet Plastic Machinery Co., Ltd. Automatic Stretch Blow Molding Machine Production, Price, Value, Gross Margin and Market Share (2021-2026)

### 9.15.5 Powerjet Plastic Machinery Co., Ltd. Recent Developments/Updates

### 9.15.6 Powerjet Plastic Machinery Co., Ltd. Competitive Strengths & Weaknesses

## 10 INDUSTRY CHAIN ANALYSIS

### 10.1 Automatic Stretch Blow Molding Machine Industry Chain

### 10.2 Automatic Stretch Blow Molding Machine Upstream Analysis

#### 10.2.1 Automatic Stretch Blow Molding Machine Core Raw Materials

#### 10.2.2 Main Manufacturers of Automatic Stretch Blow Molding Machine Core Raw Materials

### 10.3 Midstream Analysis

### 10.4 Downstream Analysis

### 10.5 Automatic Stretch Blow Molding Machine Production Mode

### 10.6 Automatic Stretch Blow Molding Machine Procurement Model

### 10.7 Automatic Stretch Blow Molding Machine Industry Sales Model and Sales Channels

#### 10.7.1 Automatic Stretch Blow Molding Machine Sales Model

#### 10.7.2 Automatic Stretch Blow Molding Machine Typical Distributors

## 11 RESEARCH FINDINGS AND CONCLUSION

## 12 APPENDIX

### 12.1 Methodology

### 12.2 Research Process and Data Source

### 12.3 Disclaimer

## List Of Tables

### LIST OF TABLES

Table 1. World Automatic Stretch Blow Molding Machine Production Value by Region (2021, 2025 and 2032) & (USD Million)

Table 2. World Automatic Stretch Blow Molding Machine Production Value by Region (2021-2026) & (USD Million)

Table 3. World Automatic Stretch Blow Molding Machine Production Value by Region (2027-2032) & (USD Million)

Table 4. World Automatic Stretch Blow Molding Machine Production Value Market Share by Region (2021-2026)

Table 5. World Automatic Stretch Blow Molding Machine Production Value Market Share by Region (2027-2032)

Table 6. World Automatic Stretch Blow Molding Machine Production by Region (2021-2026) & (K Units)

Table 7. World Automatic Stretch Blow Molding Machine Production by Region (2027-2032) & (K Units)

Table 8. World Automatic Stretch Blow Molding Machine Production Market Share by Region (2021-2026)

Table 9. World Automatic Stretch Blow Molding Machine Production Market Share by Region (2027-2032)

Table 10. World Automatic Stretch Blow Molding Machine Average Price by Region (2021-2026) & (K US\$/Unit)

Table 11. World Automatic Stretch Blow Molding Machine Average Price by Region (2027-2032) & (K US\$/Unit)

Table 12. Automatic Stretch Blow Molding Machine Major Market Trends

Table 13. World Automatic Stretch Blow Molding Machine Consumption Growth Rate Forecast by Region (2021 & 2025 & 2032) & (K Units)

Table 14. World Automatic Stretch Blow Molding Machine Consumption by Region (2021-2026) & (K Units)

Table 15. World Automatic Stretch Blow Molding Machine Consumption Forecast by Region (2027-2032) & (K Units)

Table 16. World Automatic Stretch Blow Molding Machine Production Value by Manufacturer (2021-2026) & (USD Million)

Table 17. Production Value Market Share of Key Automatic Stretch Blow Molding Machine Producers in 2025

Table 18. World Automatic Stretch Blow Molding Machine Production by Manufacturer (2021-2026) & (K Units)

Table 19. Production Market Share of Key Automatic Stretch Blow Molding Machine Producers in 2025

Table 20. World Automatic Stretch Blow Molding Machine Average Price by Manufacturer (2021-2026) & (K US\$/Unit)

Table 21. Global Automatic Stretch Blow Molding Machine Company Evaluation Quadrant

Table 22. World Automatic Stretch Blow Molding Machine Industry Rank of Major Manufacturers, Based on Production Value in 2025

Table 23. Head Office and Automatic Stretch Blow Molding Machine Production Site of Key Manufacturer

Table 24. Automatic Stretch Blow Molding Machine Market: Company Product Type Footprint

Table 25. Automatic Stretch Blow Molding Machine Market: Company Product Application Footprint

Table 26. Automatic Stretch Blow Molding Machine Competitive Factors

Table 27. Automatic Stretch Blow Molding Machine New Entrant and Capacity Expansion Plans

Table 28. Automatic Stretch Blow Molding Machine Mergers & Acquisitions Activity

Table 29. United States VS China Automatic Stretch Blow Molding Machine Production Value Comparison, (2021 & 2025 & 2032) & (USD Million)

Table 30. United States VS China Automatic Stretch Blow Molding Machine Production Comparison, (2021 & 2025 & 2032) & (K Units)

Table 31. United States VS China Automatic Stretch Blow Molding Machine Consumption Comparison, (2021 & 2025 & 2032) & (K Units)

Table 32. United States Based Automatic Stretch Blow Molding Machine Manufacturers, Headquarters and Production Site (States, Country)

Table 33. United States Based Manufacturers Automatic Stretch Blow Molding Machine Production Value, (2021-2026) & (USD Million)

Table 34. United States Based Manufacturers Automatic Stretch Blow Molding Machine Production Value Market Share (2021-2026)

Table 35. United States Based Manufacturers Automatic Stretch Blow Molding Machine Production (2021-2026) & (K Units)

Table 36. United States Based Manufacturers Automatic Stretch Blow Molding Machine Production Market Share (2021-2026)

Table 37. China Based Automatic Stretch Blow Molding Machine Manufacturers, Headquarters and Production Site (Province, Country)

Table 38. China Based Manufacturers Automatic Stretch Blow Molding Machine Production Value, (2021-2026) & (USD Million)

Table 39. China Based Manufacturers Automatic Stretch Blow Molding Machine

## Production Value Market Share (2021-2026)

Table 40. China Based Manufacturers Automatic Stretch Blow Molding Machine Production, (2021-2026) & (K Units)

Table 41. China Based Manufacturers Automatic Stretch Blow Molding Machine Production Market Share (2021-2026)

Table 42. Rest of World Based Automatic Stretch Blow Molding Machine Manufacturers, Headquarters and Production Site (State, Country)

Table 43. Rest of World Based Manufacturers Automatic Stretch Blow Molding Machine Production Value, (2021-2026) & (USD Million)

Table 44. Rest of World Based Manufacturers Automatic Stretch Blow Molding Machine Production Value Market Share (2021-2026)

Table 45. Rest of World Based Manufacturers Automatic Stretch Blow Molding Machine Production, (2021-2026) & (K Units)

Table 46. Rest of World Based Manufacturers Automatic Stretch Blow Molding Machine Production Market Share (2021-2026)

Table 47. World Automatic Stretch Blow Molding Machine Production Value by Type, (USD Million), 2021 & 2025 & 2032

Table 48. World Automatic Stretch Blow Molding Machine Production by Type (2021-2026) & (K Units)

Table 49. World Automatic Stretch Blow Molding Machine Production by Type (2027-2032) & (K Units)

Table 50. World Automatic Stretch Blow Molding Machine Production Value by Type (2021-2026) & (USD Million)

Table 51. World Automatic Stretch Blow Molding Machine Production Value by Type (2027-2032) & (USD Million)

Table 52. World Automatic Stretch Blow Molding Machine Average Price by Type (2021-2026) & (K US\$/Unit)

Table 53. World Automatic Stretch Blow Molding Machine Average Price by Type (2027-2032) & (K US\$/Unit)

Table 54. World Automatic Stretch Blow Molding Machine Production Value by Molding Process Types, (USD Million), 2021 & 2025 & 2032

Table 55. World Automatic Stretch Blow Molding Machine Production by Molding Process Types (2021-2026) & (K Units)

Table 56. World Automatic Stretch Blow Molding Machine Production by Molding Process Types (2027-2032) & (K Units)

Table 57. World Automatic Stretch Blow Molding Machine Production Value by Molding Process Types (2021-2026) & (USD Million)

Table 58. World Automatic Stretch Blow Molding Machine Production Value by Molding Process Types (2027-2032) & (USD Million)

Table 59. World Automatic Stretch Blow Molding Machine Average Price by Molding Process Types (2021-2026) & (K US\$/Unit)

Table 60. World Automatic Stretch Blow Molding Machine Average Price by Molding Process Types (2027-2032) & (K US\$/Unit)

Table 61. World Automatic Stretch Blow Molding Machine Production Value by Rated Output Types Based on 0.6 L PET Bottles, (USD Million), 2021 & 2025 & 2032

Table 62. World Automatic Stretch Blow Molding Machine Production by Rated Output Types Based on 0.6 L PET Bottles (2021-2026) & (K Units)

Table 63. World Automatic Stretch Blow Molding Machine Production by Rated Output Types Based on 0.6 L PET Bottles (2027-2032) & (K Units)

Table 64. World Automatic Stretch Blow Molding Machine Production Value by Rated Output Types Based on 0.6 L PET Bottles (2021-2026) & (USD Million)

Table 65. World Automatic Stretch Blow Molding Machine Production Value by Rated Output Types Based on 0.6 L PET Bottles (2027-2032) & (USD Million)

Table 66. World Automatic Stretch Blow Molding Machine Average Price by Rated Output Types Based on 0.6 L PET Bottles (2021-2026) & (K US\$/Unit)

Table 67. World Automatic Stretch Blow Molding Machine Average Price by Rated Output Types Based on 0.6 L PET Bottles (2027-2032) & (K US\$/Unit)

Table 68. World Automatic Stretch Blow Molding Machine Production Value by Application, (USD Million), 2021 & 2025 & 2032

Table 69. World Automatic Stretch Blow Molding Machine Production by Application (2021-2026) & (K Units)

Table 70. World Automatic Stretch Blow Molding Machine Production by Application (2027-2032) & (K Units)

Table 71. World Automatic Stretch Blow Molding Machine Production Value by Application (2021-2026) & (USD Million)

Table 72. World Automatic Stretch Blow Molding Machine Production Value by Application (2027-2032) & (USD Million)

Table 73. World Automatic Stretch Blow Molding Machine Average Price by Application (2021-2026) & (K US\$/Unit)

Table 74. World Automatic Stretch Blow Molding Machine Average Price by Application (2027-2032) & (K US\$/Unit)

Table 75. Krones AG Basic Information, Manufacturing Base and Competitors

Table 76. Krones AG Major Business

Table 77. Krones AG Automatic Stretch Blow Molding Machine Product and Services

Table 78. Krones AG Automatic Stretch Blow Molding Machine Production (K Units), Price (K US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 79. Krones AG Recent Developments/Updates

Table 80. Kronos AG Competitive Strengths & Weaknesses

Table 81. Sidel Group Basic Information, Manufacturing Base and Competitors

Table 82. Sidel Group Major Business

Table 83. Sidel Group Automatic Stretch Blow Molding Machine Product and Services

Table 84. Sidel Group Automatic Stretch Blow Molding Machine Production (K Units), Price (K US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 85. Sidel Group Recent Developments/Updates

Table 86. Sidel Group Competitive Strengths & Weaknesses

Table 87. KHS GmbH Basic Information, Manufacturing Base and Competitors

Table 88. KHS GmbH Major Business

Table 89. KHS GmbH Automatic Stretch Blow Molding Machine Product and Services

Table 90. KHS GmbH Automatic Stretch Blow Molding Machine Production (K Units), Price (K US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 91. KHS GmbH Recent Developments/Updates

Table 92. KHS GmbH Competitive Strengths & Weaknesses

Table 93. SACMI Imola S.C. Basic Information, Manufacturing Base and Competitors

Table 94. SACMI Imola S.C. Major Business

Table 95. SACMI Imola S.C. Automatic Stretch Blow Molding Machine Product and Services

Table 96. SACMI Imola S.C. Automatic Stretch Blow Molding Machine Production (K Units), Price (K US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 97. SACMI Imola S.C. Recent Developments/Updates

Table 98. SACMI Imola S.C. Competitive Strengths & Weaknesses

Table 99. SMI S.p.A. Basic Information, Manufacturing Base and Competitors

Table 100. SMI S.p.A. Major Business

Table 101. SMI S.p.A. Automatic Stretch Blow Molding Machine Product and Services

Table 102. SMI S.p.A. Automatic Stretch Blow Molding Machine Production (K Units), Price (K US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 103. SMI S.p.A. Recent Developments/Updates

Table 104. SMI S.p.A. Competitive Strengths & Weaknesses

Table 105. SIPA S.p.A. Basic Information, Manufacturing Base and Competitors

Table 106. SIPA S.p.A. Major Business

Table 107. SIPA S.p.A. Automatic Stretch Blow Molding Machine Product and Services

Table 108. SIPA S.p.A. Automatic Stretch Blow Molding Machine Production (K Units), Price (K US\$/Unit), Production Value (USD Million), Gross Margin and Market Share

(2021-2026)

Table 109. SIPA S.p.A. Recent Developments/Updates

Table 110. SIPA S.p.A. Competitive Strengths & Weaknesses

Table 111. Urola Solutions S. Coop. Basic Information, Manufacturing Base and Competitors

Table 112. Urola Solutions S. Coop. Major Business

Table 113. Urola Solutions S. Coop. Automatic Stretch Blow Molding Machine Product and Services

Table 114. Urola Solutions S. Coop. Automatic Stretch Blow Molding Machine Production (K Units), Price (K US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 115. Urola Solutions S. Coop. Recent Developments/Updates

Table 116. Urola Solutions S. Coop. Competitive Strengths & Weaknesses

Table 117. Meccanoplastica S.r.l. Basic Information, Manufacturing Base and Competitors

Table 118. Meccanoplastica S.r.l. Major Business

Table 119. Meccanoplastica S.r.l. Automatic Stretch Blow Molding Machine Product and Services

Table 120. Meccanoplastica S.r.l. Automatic Stretch Blow Molding Machine Production (K Units), Price (K US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 121. Meccanoplastica S.r.l. Recent Developments/Updates

Table 122. Meccanoplastica S.r.l. Competitive Strengths & Weaknesses

Table 123. NISSEI ASB MACHINE CO., LTD. Basic Information, Manufacturing Base and Competitors

Table 124. NISSEI ASB MACHINE CO., LTD. Major Business

Table 125. NISSEI ASB MACHINE CO., LTD. Automatic Stretch Blow Molding Machine Product and Services

Table 126. NISSEI ASB MACHINE CO., LTD. Automatic Stretch Blow Molding Machine Production (K Units), Price (K US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 127. NISSEI ASB MACHINE CO., LTD. Recent Developments/Updates

Table 128. NISSEI ASB MACHINE CO., LTD. Competitive Strengths & Weaknesses

Table 129. Aoki Technical Laboratory, Inc. Basic Information, Manufacturing Base and Competitors

Table 130. Aoki Technical Laboratory, Inc. Major Business

Table 131. Aoki Technical Laboratory, Inc. Automatic Stretch Blow Molding Machine Product and Services

Table 132. Aoki Technical Laboratory, Inc. Automatic Stretch Blow Molding Machine

Production (K Units), Price (K US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 133. Aoki Technical Laboratory, Inc. Recent Developments/Updates

Table 134. Aoki Technical Laboratory, Inc. Competitive Strengths & Weaknesses

Table 135. CHUMPOWER MACHINERY CORP. Basic Information, Manufacturing Base and Competitors

Table 136. CHUMPOWER MACHINERY CORP. Major Business

Table 137. CHUMPOWER MACHINERY CORP. Automatic Stretch Blow Molding Machine Product and Services

Table 138. CHUMPOWER MACHINERY CORP. Automatic Stretch Blow Molding Machine Production (K Units), Price (K US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 139. CHUMPOWER MACHINERY CORP. Recent Developments/Updates

Table 140. CHUMPOWER MACHINERY CORP. Competitive Strengths & Weaknesses

Table 141. Guangzhou Tech-Long Packaging Machinery Co., Ltd. Basic Information, Manufacturing Base and Competitors

Table 142. Guangzhou Tech-Long Packaging Machinery Co., Ltd. Major Business

Table 143. Guangzhou Tech-Long Packaging Machinery Co., Ltd. Automatic Stretch Blow Molding Machine Product and Services

Table 144. Guangzhou Tech-Long Packaging Machinery Co., Ltd. Automatic Stretch Blow Molding Machine Production (K Units), Price (K US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 145. Guangzhou Tech-Long Packaging Machinery Co., Ltd. Recent Developments/Updates

Table 146. Guangzhou Tech-Long Packaging Machinery Co., Ltd. Competitive Strengths & Weaknesses

Table 147. Jiangsu Newamstar Packaging Machinery Co., Ltd. Basic Information, Manufacturing Base and Competitors

Table 148. Jiangsu Newamstar Packaging Machinery Co., Ltd. Major Business

Table 149. Jiangsu Newamstar Packaging Machinery Co., Ltd. Automatic Stretch Blow Molding Machine Product and Services

Table 150. Jiangsu Newamstar Packaging Machinery Co., Ltd. Automatic Stretch Blow Molding Machine Production (K Units), Price (K US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 151. Jiangsu Newamstar Packaging Machinery Co., Ltd. Recent Developments/Updates

Table 152. Jiangsu Newamstar Packaging Machinery Co., Ltd. Competitive Strengths & Weaknesses

Table 153. Demark Holding Group Co., Ltd. Basic Information, Manufacturing Base and

## Competitors

Table 154. Demark Holding Group Co., Ltd. Major Business

Table 155. Demark Holding Group Co., Ltd. Automatic Stretch Blow Molding Machine Product and Services

Table 156. Demark Holding Group Co., Ltd. Automatic Stretch Blow Molding Machine Production (K Units), Price (K US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 157. Demark Holding Group Co., Ltd. Recent Developments/Updates

Table 158. Demark Holding Group Co., Ltd. Competitive Strengths & Weaknesses

Table 159. Powerjet Plastic Machinery Co., Ltd. Basic Information, Manufacturing Base and Competitors

Table 160. Powerjet Plastic Machinery Co., Ltd. Major Business

Table 161. Powerjet Plastic Machinery Co., Ltd. Automatic Stretch Blow Molding Machine Product and Services

Table 162. Powerjet Plastic Machinery Co., Ltd. Automatic Stretch Blow Molding Machine Production (K Units), Price (K US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 163. Powerjet Plastic Machinery Co., Ltd. Recent Developments/Updates

Table 164. Powerjet Plastic Machinery Co., Ltd. Competitive Strengths & Weaknesses

Table 165. Global Key Players of Automatic Stretch Blow Molding Machine Upstream (Raw Materials)

Table 166. Global Automatic Stretch Blow Molding Machine Typical Customers

Table 167. Automatic Stretch Blow Molding Machine Typical Distributors

## List Of Figures

### LIST OF FIGURES

Figure 1. Automatic Stretch Blow Molding Machine Picture

Figure 2. World Automatic Stretch Blow Molding Machine Production Value: 2021 & 2025 & 2032, (USD Million)

Figure 3. World Automatic Stretch Blow Molding Machine Production Value and Forecast (2021-2032) & (USD Million)

Figure 4. World Automatic Stretch Blow Molding Machine Production (2021-2032) & (K Units)

Figure 5. World Automatic Stretch Blow Molding Machine Average Price (2021-2032) & (K US\$/Unit)

Figure 6. World Automatic Stretch Blow Molding Machine Production Value Market Share by Region (2021-2032)

Figure 7. World Automatic Stretch Blow Molding Machine Production Market Share by Region (2021-2032)

Figure 8. North America Automatic Stretch Blow Molding Machine Production (2021-2032) & (K Units)

Figure 9. Europe Automatic Stretch Blow Molding Machine Production (2021-2032) & (K Units)

Figure 10. China Automatic Stretch Blow Molding Machine Production (2021-2032) & (K Units)

Figure 11. Japan Automatic Stretch Blow Molding Machine Production (2021-2032) & (K Units)

Figure 12. Automatic Stretch Blow Molding Machine Market Drivers

Figure 13. Factors Affecting Demand

Figure 14. World Automatic Stretch Blow Molding Machine Consumption (2021-2032) & (K Units)

Figure 15. World Automatic Stretch Blow Molding Machine Consumption Market Share by Region (2021-2032)

Figure 16. United States Automatic Stretch Blow Molding Machine Consumption (2021-2032) & (K Units)

Figure 17. China Automatic Stretch Blow Molding Machine Consumption (2021-2032) & (K Units)

Figure 18. Europe Automatic Stretch Blow Molding Machine Consumption (2021-2032) & (K Units)

Figure 19. Japan Automatic Stretch Blow Molding Machine Consumption (2021-2032) & (K Units)

Figure 20. South Korea Automatic Stretch Blow Molding Machine Consumption (2021-2032) & (K Units)

Figure 21. ASEAN Automatic Stretch Blow Molding Machine Consumption (2021-2032) & (K Units)

Figure 22. India Automatic Stretch Blow Molding Machine Consumption (2021-2032) & (K Units)

Figure 23. Producer Shipments of Automatic Stretch Blow Molding Machine by Manufacturer Revenue (\$MM) and Market Share (%): 2025

Figure 24. Global Four-firm Concentration Ratios (CR4) for Automatic Stretch Blow Molding Machine Markets in 2025

Figure 25. Global Four-firm Concentration Ratios (CR8) for Automatic Stretch Blow Molding Machine Markets in 2025

Figure 26. United States VS China: Automatic Stretch Blow Molding Machine Production Value Market Share Comparison (2021 & 2025 & 2032)

Figure 27. United States VS China: Automatic Stretch Blow Molding Machine Production Market Share Comparison (2021 & 2025 & 2032)

Figure 28. United States VS China: Automatic Stretch Blow Molding Machine Consumption Market Share Comparison (2021 & 2025 & 2032)

Figure 29. United States Based Manufacturers Automatic Stretch Blow Molding Machine Production Market Share 2025

Figure 30. China Based Manufacturers Automatic Stretch Blow Molding Machine Production Market Share 2025

Figure 31. Rest of World Based Manufacturers Automatic Stretch Blow Molding Machine Production Market Share 2025

Figure 32. World Automatic Stretch Blow Molding Machine Production Value by Type, (USD Million), 2021 & 2025 & 2032

Figure 33. World Automatic Stretch Blow Molding Machine Production Value Market Share by Type in 2025

Figure 34. Linear Automatic Stretch Blow Molding Machine

Figure 35. Rotary Automatic Stretch Blow Molding Machine

Figure 36. World Automatic Stretch Blow Molding Machine Production Market Share by Type (2021-2032)

Figure 37. World Automatic Stretch Blow Molding Machine Production Value Market Share by Type (2021-2032)

Figure 38. World Automatic Stretch Blow Molding Machine Average Price by Type (2021-2032) & (K US\$/Unit)

Figure 39. World Automatic Stretch Blow Molding Machine Production Value by Molding Process Types, (USD Million), 2021 & 2025 & 2032

Figure 40. World Automatic Stretch Blow Molding Machine Production Value Market

Share by Molding Process Types in 2025

Figure 41. One-step Injection Stretch Blow Molding Machine

Figure 42. 1.5-step Injection Stretch Blow Molding Machine

Figure 43. Two-step Reheat Stretch Blow Molding Machine

Figure 44. World Automatic Stretch Blow Molding Machine Production Market Share by Molding Process Types (2021-2032)

Figure 45. World Automatic Stretch Blow Molding Machine Production Value Market Share by Molding Process Types (2021-2032)

Figure 46. World Automatic Stretch Blow Molding Machine Average Price by Molding Process Types (2021-2032) & (K US\$/Unit)

Figure 47. World Automatic Stretch Blow Molding Machine Production Value by Rated Output Types Based on 0.6 L PET Bottles, (USD Million), 2021 & 2025 & 2032

Figure 48. World Automatic Stretch Blow Molding Machine Production Value Market Share by Rated Output Types Based on 0.6 L PET Bottles in 2025

Figure 49. Low Output Automatic Stretch Blow Molding Machine (<6,000 Bottles/Hour)

Figure 50. Medium Output Automatic Stretch Blow Molding Machine (6,000–20,000 Bottles/Hour)

Figure 51. High Output Automatic Stretch Blow Molding Machine (>20,000 Bottles/Hour)

Figure 52. World Automatic Stretch Blow Molding Machine Production Market Share by Rated Output Types Based on 0.6 L PET Bottles (2021-2032)

Figure 53. World Automatic Stretch Blow Molding Machine Production Value Market Share by Rated Output Types Based on 0.6 L PET Bottles (2021-2032)

Figure 54. World Automatic Stretch Blow Molding Machine Average Price by Rated Output Types Based on 0.6 L PET Bottles (2021-2032) & (K US\$/Unit)

Figure 55. World Automatic Stretch Blow Molding Machine Production Value by Application, (USD Million), 2021 & 2025 & 2032

Figure 56. World Automatic Stretch Blow Molding Machine Production Value Market Share by Application in 2025

Figure 57. Food & Beverage Industry

Figure 58. Water Packaging

Figure 59. Edible Oil

Figure 60. Others

Figure 61. World Automatic Stretch Blow Molding Machine Production Market Share by Application (2021-2032)

Figure 62. World Automatic Stretch Blow Molding Machine Production Value Market Share by Application (2021-2032)

Figure 63. World Automatic Stretch Blow Molding Machine Average Price by Application (2021-2032) & (K US\$/Unit)

Figure 64. Automatic Stretch Blow Molding Machine Industry Chain

Figure 65. Automatic Stretch Blow Molding Machine Procurement Model

Figure 66. Automatic Stretch Blow Molding Machine Sales Model

Figure 67. Automatic Stretch Blow Molding Machine Sales Channels, Direct Sales, and Distribution

Figure 68. Methodology

Figure 69. Research Process and Data Source

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