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Global Individual Section Machines Supply, Demand and Key Producers, 2026-2032

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Abstracts

The global Individual Section Machines market size is expected to reach $ 1337 million by 2032, rising at a market growth of 6.2% CAGR during the forecast period (2026-2032).

Individual Section Machines, also called IS Machines, are automatic glass-container forming machines used to produce bottles, jars, vials, and other hollow glass containers. The machine is divided into multiple independent forming sections, allowing each section to produce containers while other sections continue operating or are maintained separately. Molten glass is cut into gobs, delivered into molds, and formed mainly by blow-and-blow and press-and-blow. Modern IS machines include gob delivery, blank molds, blow molds, take-out systems, ware handling, and process controls.
Global production capacity is approximately 500 units.

In 2025, global sales reached approximately 235 units, with an average price of around million US$ 3.65 per unit, gross margin around 31%.

The Individual Section Machine market has a stable long-term outlook because IS machines are core equipment in container glass production and are difficult to replace with alternative forming technologies. Growth is expected to come mainly from capacity expansion in beverages, food packaging, pharmaceuticals, cosmetics, and premium glass containers, as well as modernization of older lines. Competition will focus on forming speed, flexibility, energy efficiency, automation, digital controls, service capability, and total line solutions. However, high capital cost, long replacement cycles, skilled-operator requirements, and cyclicality in glass packaging investment may limit short-term growth. Mature suppliers with complete systems will remain favored.

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Market trend

The IS machine market is moving toward higher speed, higher flexibility, and greater automation. Glass plants increasingly require machines that can support single, double, triple, and quadruple gob operation, fast job changeover, lighter containers, and stable quality at high output. Servo-electric drives, advanced section controls, vision sensors, swab robots, and hot-end/cold-end data integration are becoming important upgrade directions. Demand is also shifting from standalone machines to full forming lines, including gob forming, delivery, ware handling, inspection, controls, service, and spare parts. Suppliers with complete lifecycle support are gaining advantage.

Market drive

Key market drivers include growth in glass packaging for food, beverages, pharmaceuticals, cosmetics, and premium consumer goods. Glass is favored because it preserves product quality, supports brand image, and is recyclable, which fits sustainability and circular-economy packaging trends. Rising beverage consumption, urbanization, premiumization, stricter packaging safety requirements, and demand for reusable or recyclable packaging all support investment in glass-container production capacity. For glass manufacturers, IS machines are critical because they directly affect output, container weight, defect rate, energy efficiency, and line productivity. Replacement demand is also driven by older pneumatic machines being upgraded with servo and digital controls.

Upstream and downstream

Upstream suppliers include steel structure manufacturers, precision machining companies, mold makers, refractory material suppliers, servo motor and drive suppliers, pneumatic component companies, control-system providers, sensors, lubrication systems, and spare-part manufacturers. Key equipment makers integrate these parts into complete hot-end forming systems. Downstream customers are container glass producers serving food, beverage, wine, beer, spirits, pharmaceutical, cosmetics, and household product brands. Major downstream glass-packaging companies include O-I Glass, Ardagh Group, Verallia, Gerresheimer, Vidrala, Vetropack, Saverglass, and BA Glass. Demand is concentrated in plants requiring high output, stable quality, and continuous 24-hour production.

This report studies the global Individual Section Machines production, demand, key manufacturers, and key regions.

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This report is a detailed and comprehensive analysis of the world market for Individual Section Machines 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 Individual Section Machines that contribute to its increasing demand across many markets.

Highlights and key features of the study
Global Individual Section Machines total production and demand, 2021-2032, (Units)
Global Individual Section Machines total production value, 2021-2032, (USD Million)
Global Individual Section Machines production by region & country, production, value, CAGR, 2021-2032, (USD Million) & (Units), (based on production site)
Global Individual Section Machines consumption by region & country, CAGR, 2021-2032 & (Units)
U.S. VS China: Individual Section Machines domestic production, consumption, key domestic manufacturers and share
Global Individual Section Machines production by manufacturer, production, price, value and market share 2021-2026, (USD Million) & (Units)
Global Individual Section Machines production by Type, production, value, CAGR, 2021-2032, (USD Million) & (Units)
Global Individual Section Machines production by Application, production, value, CAGR, 2021-2032, (USD Million) & (Units)

This report profiles key players in the global Individual Section Machines 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 Bucher Industries AG, Ardagh Group S.A., BDF Industries S.p.A., Bottero S.p.A., GC Machinery Holding B.V., Nihon Yamamura Glass Co., Ltd., Shandong Jiafeng Glass Machinery Co., Ltd., Shandong Jingxin Machinery Equipment Co., Ltd., Toyo Seikan Group Holdings, Ltd., Takeuchi Manufacturing Co., Ltd., 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 Individual Section Machines market

Detailed Segmentation:

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Each section contains quantitative market data including market by value (US$ Millions), volume (production, consumption) & (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 Individual Section Machines Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Global Individual Section Machines Market, Segmentation by Type:

Single Gob

Double Gob

Triple Gob

Others

Global Individual Section Machines Market, Segmentation by Molding:

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Blow & Blow

Press & Blow

Global Individual Section Machines Market, Segmentation by Classification:

Mechanical

Electronic

Global Individual Section Machines Market, Segmentation by Application:

Food and Beverage

Pharmaceutical

Cosmetics and Personal Care

Chemical

Others

Companies Profiled:

Bucher Industries AG

Ardagh Group S.A.

BDF Industries S.p.A.

Bottero S.p.A.

GC Machinery Holding B.V.

Nihon Yamamura Glass Co., Ltd.

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Shandong Jiafeng Glass Machinery Co., Ltd.

Shandong Jingxin Machinery Equipment Co., Ltd.

Toyo Seikan Group Holdings, Ltd.

Takeuchi Manufacturing Co., Ltd.

Shamvik Glasstech Pvt. Ltd.

Vitro, S.A.B. de C.V.

Shandong Ruiteng Machine Building Co., Ltd.

Key Questions Answered:
1. How big is the global Individual Section Machines market?
2. What is the demand of the global Individual Section Machines market?
3. What is the year over year growth of the global Individual Section Machines market?
4. What is the production and production value of the global Individual Section Machines market?
5. Who are the key producers in the global Individual Section Machines market?
6. What are the growth factors driving the market demand?

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