

Global IS Forming Machines Supply, Demand and Key Producers, 2026-2032

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Abstracts

The global IS Forming Machines market size is expected to reach \$ 1334 million by 2032, rising at a market growth of 6.1% CAGR during the forecast period (2026-2032).

IS Forming Machines, or Individual Section Forming Machines, are automatic hot-end glass container forming machines used to produce bottles, jars, vials, and other hollow glass containers. The machine is divided into multiple independent forming sections, and each section receives molten glass gobs, forms the blank, transfers it to the blow mold, and completes container forming. Common forming processes include blow-and-blow and press-and-blow. IS forming machines are normally integrated with gob forming, gob delivery, ware handling, section controls, process control systems, and spare parts support.

Global production capacity is approximately 500 units.

In 2025, global sales reached approximately 240 units, with an average price of around million US\$ 3.59 per unit, gross margin around 31%.

The IS Forming Machines market has a stable long-term outlook because these machines are core equipment for automatic glass container production and have limited direct substitutes. Future growth will come from new glass packaging capacity, modernization of older forming lines, lightweight container production, higher automation, and demand for more efficient hot-end operation. Competition will focus on forming speed, reliability, flexibility, servo-electric technology, digital controls, energy efficiency, service capability, and complete line integration. However, high capital cost, long replacement cycles, skilled operator requirements, and cyclical investment by glass manufacturers may limit short-term growth.

Market trend

The IS Forming Machines market is moving toward higher speed, greater production flexibility, servo-electric control, and digitalized hot-end operation. Glass container manufacturers increasingly require equipment that supports multiple gob configurations, lighter container production, shorter job changeover, and stable forming quality during continuous operation. Servo-driven NIS machines, advanced pneumatic AIS machines, electronic timing, vision sensors, swab robots, section-level controls, and process data integration are becoming key technology directions. Demand is also shifting from single forming machines to complete hot-end solutions, including gob forming, container forming, ware handling, controls, service programs, and spare parts.

Market drive

Market growth is mainly driven by demand for glass packaging in beer, wine, spirits, soft drinks, food, pharmaceuticals, cosmetics, and premium consumer goods. Glass containers are valued for product safety, chemical stability, premium appearance, recyclability, and suitability for high-quality packaging. For glass producers, IS forming machines directly affect output, container weight, defect rate, forming stability, and production cost. Replacement demand is also important, as older machines are upgraded with servo drives, automation, better controls, and monitoring systems. Capacity expansion in emerging markets and modernization in mature markets continue to support investment in advanced IS forming machines.

Upstream and downstream

Upstream suppliers include steel casting and precision machining companies, glass molds, servo motors, drives, pneumatic components, hydraulic components, sensors, control systems, refractory parts, lubrication systems, and hot-end spare parts. IS forming machine manufacturers integrate these components into complete forming systems. Downstream customers are mainly container glass manufacturers serving beverage, food, pharmaceutical, cosmetics, household chemical, and premium packaging brands. Typical downstream glass packaging producers include O-I Glass, Ardagh Group, Verallia, Vidrala, Vetropack, Gerresheimer, Saverglass, BA Glass, and regional glass bottle manufacturers that operate continuous high-volume production lines and require reliable equipment support.

This report studies the global IS Forming Machines production, demand, key manufacturers, and key regions.

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

Highlights and key features of the study

Global IS Forming Machines total production and demand, 2021-2032, (Units)

Global IS Forming Machines total production value, 2021-2032, (USD Million)

Global IS Forming Machines production by region & country, production, value, CAGR, 2021-2032, (USD Million) & (Units), (based on production site)

Global IS Forming Machines consumption by region & country, CAGR, 2021-2032 & (Units)

U.S. VS China: IS Forming Machines domestic production, consumption, key domestic manufacturers and share

Global IS Forming Machines production by manufacturer, production, price, value and market share 2021-2026, (USD Million) & (Units)

Global IS Forming Machines production by Type, production, value, CAGR, 2021-2032, (USD Million) & (Units)

Global IS Forming Machines production by Application, production, value, CAGR, 2021-2032, (USD Million) & (Units)

This report profiles key players in the global IS Forming 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 IS Forming Machines market

Detailed Segmentation:

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 IS Forming Machines Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Global IS Forming Machines Market, Segmentation by Type:

Single Gob

Double Gob

Triple Gob

Others

Global IS Forming Machines Market, Segmentation by Molding:

Blow & Blow

Press & Blow

Global IS Forming Machines Market, Segmentation by Classification:

Mechanical

Electronic

Global IS Forming 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.

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 IS Forming Machines market?
2. What is the demand of the global IS Forming Machines market?
3. What is the year over year growth of the global IS Forming Machines market?
4. What is the production and production value of the global IS Forming Machines market?
5. Who are the key producers in the global IS Forming Machines market?
6. What are the growth factors driving the market demand?

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