

Global Mechanical IS Machine Supply, Demand and Key Producers, 2026-2032

<https://marketpublishers.com/r/G25612372DBCEN.html>

Date: July 2026

Pages: 104

Price: US\$ 4,480.00 (Single User License)

ID: G25612372DBCEN

Abstracts

The global Mechanical IS Machine market size is expected to reach \$ 454 million by 2032, rising at a market growth of 5.9% CAGR during the forecast period (2026-2032).

A Mechanical IS Machine, or mechanical Individual Section Machine, is a traditional glass container forming machine used to produce bottles, jars, vials, and other hollow glass containers. It is divided into several independent forming sections, and each section contains mechanisms for blank forming, transfer, blow forming, and take-out. Compared with modern servo-electric IS machines, mechanical IS machines rely more on mechanical timing, cams, pneumatic drives, and conventional motion mechanisms. They are widely used in container glass plants for high-volume production, especially where stable, proven, and cost-effective forming technology is required. Global production capacity is approximately 200 units.

In 2025, global sales reached approximately 115 units, with an average price of around million US\$ 2.57 per unit, gross margin around 30%.

The Mechanical IS Machine market is relatively mature, but it remains important because a large number of glass container plants still operate traditional IS forming lines. Future demand will be supported by replacement, rebuilding, spare parts, and modernization of existing machines rather than rapid new-machine growth. Servo-electric and advanced pneumatic systems will continue to gain share in high-end plants, but mechanical machines will remain competitive where cost, reliability, operator familiarity, and maintenance convenience are priorities. Key competition will focus on machine durability, forming stability, retrofit capability, spare parts availability, service response, and total cost of ownership.

Market trend

The Mechanical IS Machine market is gradually shifting from traditional mechanical and pneumatic systems toward more automated and servo-assisted forming solutions. However, mechanical IS machines still maintain demand in many glass plants because of their proven reliability, lower investment cost, easy maintenance, and wide installed base. Many customers prefer upgrading existing machines with electronic timing, improved controls, better cooling, automatic lubrication, swabbing robots, and process monitoring instead of replacing full lines. Market demand is therefore concentrated in replacement parts, refurbishment, line upgrading, and cost-effective new equipment for emerging glass packaging markets.

Market drive

Market demand is mainly driven by continuous production needs in glass packaging for beer, wine, spirits, food, beverages, pharmaceuticals, cosmetics, and household products. Mechanical IS machines remain attractive because they provide stable output, relatively simple operation, lower maintenance complexity, and lower capital cost than fully servo-electric machines. In emerging markets, many glass producers still prioritize durable equipment and affordable forming capacity. In mature markets, demand mainly comes from machine refurbishment, section replacement, spare parts, and control upgrades. Growth is also supported by the need to improve productivity, reduce defects, extend machine life, and produce lighter glass containers.

Upstream and downstream

Upstream suppliers include steel casting companies, precision machining suppliers, glass mold manufacturers, cam and mechanical component suppliers, pneumatic component makers, hydraulic parts suppliers, sensors, control systems, refractory parts, lubrication systems, and hot-end spare-part manufacturers. Mechanical IS machine producers integrate these parts into complete forming systems or provide rebuilding and retrofit services. Downstream customers are container glass manufacturers serving beer, wine, spirits, soft drinks, food, pharmaceuticals, cosmetics, perfume, and household packaging brands. Typical downstream glass producers include O-I Glass, Ardagh Group, Verallia, Vidrala, Vetropack, Gerresheimer, Saverglass, BA Glass, and regional glass bottle manufacturers.

This report studies the global Mechanical IS Machine production, demand, key manufacturers, and key regions.

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

Highlights and key features of the study

Global Mechanical IS Machine total production and demand, 2021-2032, (Units)

Global Mechanical IS Machine total production value, 2021-2032, (USD Million)

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

Global Mechanical IS Machine consumption by region & country, CAGR, 2021-2032 & (Units)

U.S. VS China: Mechanical IS Machine domestic production, consumption, key domestic manufacturers and share

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

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

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

This report profiles key players in the global Mechanical IS 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 Bucher Industries AG, Ardagh Group S.A., Bottero S.p.A., BDF Industries S.p.A., Toyo Seikan Group Holdings, Ltd., Takeuchi Manufacturing Co., Ltd., Shandong Jiafeng Glass Machinery Co., Ltd., Shandong Jingxin Machinery Equipment Co., Ltd., Shandong Ruiteng Machine Building Co., Ltd., Shamvik Glasstech Pvt. 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 Mechanical IS Machine 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 Mechanical IS Machine Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Global Mechanical IS Machine Market, Segmentation by Type:

Single Gob

Double Gob

Triple Gob

Others

Global Mechanical IS Machine Market, Segmentation by Molding:

Blow & Blow

Press & Blow

Global Mechanical IS Machine Market, Segmentation by Classification:

Below 10 Sections

Above 10 Sections

Global Mechanical IS Machine Market, Segmentation by Application:

Food and Beverage

Pharmaceutical

Cosmetics and Personal Care

Chemical

Others

Companies Profiled:

Bucher Industries AG

Ardagh Group S.A.

Bottero S.p.A.

BDF Industries S.p.A.

Toyo Seikan Group Holdings, Ltd.

Takeuchi Manufacturing Co., Ltd.

Shandong Jiafeng Glass Machinery Co., Ltd.

Shandong Jingxin Machinery Equipment Co., Ltd.

Shandong Ruiteng Machine Building Co., Ltd.

Shamvik Glasstech Pvt. Ltd.

Key Questions Answered:

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

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