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Global Pellet Mill Mould Supply, Demand and Key Producers, 2026-2032

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Abstracts

The global Pellet Mill Mould market size is expected to reach $ 193 million by 2032, rising at a market growth of 2.8% CAGR during the forecast period (2026-2032).

Pellet Mill Mould is a core forming component of a pellet mill that works in conjunction with rollers to force powdered, granular, or conditioned raw materials into and through die holes under mechanical pressure, thereby compacting the material and continuously extruding it into pellets with specified diameters and densities. Based on structural design, pellet mill moulds mainly include ring dies and flat dies and are typically manufactured from wear-resistant alloy steel, stainless steel, high-chromium steel, or other suitable materials. Key parameters such as die hole diameter, effective working length, compression ratio, hole geometry, hole pattern, and die material directly affect pellet size, density, durability, production efficiency, energy consumption, and die service life. Pellet mill moulds are widely used in animal feed, biomass fuel, and other applications where raw materials are densified into pellets through compression forming.

Key Findings

Animal feed remains the largest application base, supported by a global feed industry producing more than one billion tonnes annually

Ring dies represent the mainstream industrial configuration, while flat dies retain relevance in smaller and selected specialized pelletizing systems

Asia-Pacific represents the largest demand region by volume, supported by the

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world’s largest regional feed production base

Industrial replacement dies are generally priced per piece, with specifications, steel grade, dimensions and OEM compatibility driving substantial price differences

The competitive structure combines global pellet-mill OEMs, specialized European die manufacturers and an increasingly scaled Chinese manufacturing cluster

Market Trends

The Pellet Mill Mould market is moving from conventional wear-part manufacturing toward application-engineered, high-precision consumables. Manufacturers are investing in automated gun drilling, CNC machining, vacuum heat treatment, tighter hardness control and optimized die-hole distribution to improve throughput, reduce power consumption and extend operating life. Bühler reports that optimized parallel hole patterns can reduce energy consumption, while PCE emphasizes hole distribution, dimensional stability and controlled hardness as performance differentiators. Salmatec has expanded highly integrated CNC die manufacturing, and ANDRITZ continues to invest in automated global die production. Another structural trend is the growth of multi-brand aftermarket supply: major manufacturers increasingly design replacement dies not only for their own pellet mills but also for competing equipment platforms. Product development is therefore becoming more application-specific, with compression ratio, effective pelleting length, hole entry and relief design increasingly optimized for feed formulations, fine aquafeed, fibrous biomass, recycling materials and other demanding raw materials.

Market Dynamics

Drivers

Demand is primarily supported by the recurring replacement cycle of dies, rather than solely by sales of new pellet mills. Pellet dies operate under continuous pressure, friction and thermal loading and therefore constitute wear parts that require periodic replacement or refurbishment. The large installed base of feed mills provides the broadest demand foundation: global feed production reached approximately 1.396

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billion tonnes in 2024, with Asia-Pacific alone accounting for more than 533 million tonnes. Biomass is another important growth driver; global wood pellet production reached 53.5 million tonnes in 2025, strengthening replacement demand for dies used under relatively abrasive biomass-processing conditions. Expansion of commercial feed production, higher-capacity pellet mills and tighter requirements for pellet durability and energy efficiency also support demand for higher-performance dies.

Restraints

Market expansion is restrained by improvements in die durability and by refurbishment practices that extend usable life. High-chromium steels, case-hardened alloy steels, optimized heat treatment, improved hole surface finish and better pellet-mill operating control can materially reduce premature wear, lowering replacement frequency per installed machine. Manufacturers such as Bühler and General Dies also provide die refurbishment or reconditioning services, creating an economic alternative to immediate replacement. In addition, not every downstream pellet product uses a conventional pellet mill: extrusion remains important in premium aquafeed and pet food, which limits the addressable demand for pellet mill dies in these segments. Mature feed-production markets in Europe and North America also provide a more stable aftermarket opportunity than a high-growth equipment replacement cycle.

Opportunities

The strongest opportunities are concentrated in high-throughput replacement dies, application-specific die engineering and regionalized aftermarket supply. Producers that can manufacture dies for multiple pellet-mill brands can address a much larger installed base than suppliers tied to a single OEM platform. Fine-hole aquafeed, abrasive biomass, high-fiber formulations and recycling materials create opportunities for higher-value dies with optimized compression geometry, improved steel selection and advanced heat treatment. China is increasingly important not only as a demand market but also as a manufacturing and export base: ANDRITZ operates a Foshan ring-die plant with annual production of 8,000 units, while Chinese specialist manufacturers have developed substantial gun-drilling, vacuum heat-treatment and customized replacement capabilities. Emerging commercial feed capacity in Southeast Asia, Latin America, Africa and the Middle East provides additional long-term aftermarket potential.

Challenges

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The principal competitive challenge is maintaining performance consistency while controlling manufacturing cost. A pellet die is highly sensitive to metallurgical quality, forging consistency, drilling accuracy, heat-treatment uniformity, concentricity, working-surface finish and compression geometry; small deviations can reduce pellet quality, throughput or die life. At the same time, customers increasingly expect short lead times and compatibility with a wide range of pellet-mill models, forcing manufacturers to maintain extensive drawing libraries, raw-material inventories and flexible machining capacity. Competition from lower-cost Asian replacement dies places pressure on European and North American suppliers, while OEM and premium specialist brands increasingly compete through lifecycle performance, energy efficiency, technical service and rapid aftermarket support rather than initial purchase price alone. Volatility in alloy-steel, energy and machining costs remains an additional profitability risk.

Industry Chain Analysis

The upstream industry chain consists mainly of high-chromium and stainless steel, case-hardening alloy steel, forged or rolled ring blanks, flat-die blanks, cutting tools, deep-hole gun-drilling equipment, CNC machine tools and vacuum or controlled-atmosphere heat-treatment systems. Midstream manufacturing typically involves material inspection, turning, die geometry design, deep-hole drilling, counterboring or relief machining, heat treatment, final grinding, dimensional inspection and, for some manufacturers, die running-in before shipment. Material systems such as X46Cr13, 20MnCr5 and 18NiCrMo5 are widely used, with different hardening routes selected for corrosion resistance, surface hardness, toughness and wear performance. Downstream customers include compound-feed mills, integrated livestock and poultry producers, aquafeed plants, biomass pellet producers and other industrial pelletizing facilities. Value creation is increasingly concentrated in application engineering, accurate reproduction of OEM interfaces, compression-ratio optimization, rapid delivery and lifecycle service rather than steel and machining alone.

Segment Insights

By structural type, Ring Die is the dominant industrial segment because ring-die pellet mills are widely employed in medium- and large-scale feed and biomass production, where continuous throughput and a large effective pelleting area are required. Flat Die serves a smaller but established market covering flat-die pellet presses, selected industrial systems and small- to medium-scale biomass and feed applications. General

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Dies, SALMATEC and MÜNCH-Edelstahl all manufacture both configurations, confirming that the two types represent established commercial product categories. By material, High-Chromium Steel Die is the mainstream option for applications requiring strong wear and corrosion resistance, while Case-Hardened Alloy Steel Die remains important where a hard wear-resistant surface combined with a tougher core is preferred.

By Die Hole Diameter, the study uses ?2 mm, >2 mm to <6 mm, and ?6 mm as analytical bands. The smallest-hole segment is particularly relevant to fine aquafeed and other small-pellet formulations; the intermediate range covers a substantial portion of conventional livestock, poultry and general feed production; and larger holes are widely associated with biomass, coarse feed and other larger-pellet applications. These thresholds are market-analysis groupings rather than mandatory international engineering standards, as manufacturers normally customize hole diameter, effective pelleting length and compression ratio according to raw material and pellet specifications. Commercial product portfolios demonstrate very broad ranges: General Dies manufactures holes from approximately 1.5 mm to 24 mm, Mabrik from 1.8 mm to 25 mm, and MÜNCH-Edelstahl up to 50 mm.

Downstream Market Opportunities

Animal Feed represents the core demand base, covering livestock, poultry and other mechanically pelleted feeds, while Aquafeed provides a more technically demanding opportunity where small die holes, precise surface finishing and controlled compression are important. Biomass and Biofuel constitutes the other major market pillar, particularly for wood, sawdust, agricultural residues and other fibrous materials that can generate relatively severe die wear. Bioenergy Europe reported global wood pellet production of 53.5 million tonnes in 2025, indicating a substantial operating base requiring recurring wear-part replacement. Other opportunities include fertilizer, compost, recycling materials and selected industrial pellets. The most attractive opportunities are not simply linked to additional pellet tonnage, but to applications combining high throughput, abrasive materials, difficult formulations or frequent product changes, because these operating conditions place greater value on die engineering, service life and fast replacement availability.

Regional Insights

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Asia-Pacific is the largest demand region by volume, underpinned by the world's largest feed-production base and a dense pellet-equipment manufacturing ecosystem in China. Alltech recorded Asia-Pacific feed production of more than 533 million tonnes in 2024, substantially ahead of other regions. China is also becoming a significant production center for replacement dies, ranging from multinational manufacturing operations such as ANDRITZ Foshan to specialist domestic producers including Jumeila, Zhengchang, Tianhe Feed Machinery, Sichuan Meishan Jinding Machinery Mould, FDSP, Hongxing Machinery and Hanpai Mould. The combination of local demand, lower manufacturing costs and growing export capabilities supports the region's importance in both consumption and supply.

Europe remains a high-value technology and manufacturing center, with ANDRITZ Geldrop, SALMATEC, La Meccanica, MÜNCH-Edelstahl, General Dies, Mabrik and Pelleting Consumables Europe supplying global customers. Europe is also the world's largest wood-pellet producing and consuming region, supporting biomass-related replacement demand. North America has a mature feed and biomass aftermarket led by CPM and other specialist suppliers, with industry consolidation strengthening aftermarket coverage. Latin America offers growth potential from expanding poultry, pork and livestock feed production, while the Middle East and Africa remain smaller markets but are benefiting from continued development of commercial feed manufacturing.

Competitive Landscape Analysis

The global Pellet Mill Mould market combines diversified pellet-equipment OEMs and specialist independent die manufacturers. ANDRITZ, CPM and Bühler form the most prominent global group, supported by large installed equipment bases, cross-brand replacement-die capabilities, engineering resources and international service networks. ANDRITZ has expanded dedicated die manufacturing in Europe, China and North America, while CPM has materially strengthened its aftermarket position through the acquisition of Dorssers in 2022 and Jacobs Global in 2024. European specialists including SALMATEC, La Meccanica, MÜNCH-Edelstahl, General Dies, Mabrik and Pelleting Consumables Europe compete through precision manufacturing, application engineering and broad OEM compatibility. Chinese suppliers including Jumeila, Zhengchang, Tianhe Feed Machinery, Jinding Machinery, FDSP, Hongxing Machinery and Hanpai Mould increasingly compete internationally through scaled manufacturing, customized specifications, shorter lead times and competitive pricing. Competition is consequently shifting from basic die supply toward a combination of lifecycle cost, pellet

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quality, energy consumption, wear resistance, delivery speed and technical support.

Report Scope

This report studies the global Pellet Mill Mould production, demand, key manufacturers, and key regions.

This report is a detailed and comprehensive analysis of the world market for Pellet Mill Mould 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 Pellet Mill Mould that contribute to its increasing demand across many markets.

Highlights and key features of the study

Global Pellet Mill Mould total production and demand, 2021-2032, (K Units)

Global Pellet Mill Mould total production value, 2021-2032, (USD Million)

Global Pellet Mill Mould production by region & country, production, value, CAGR, 2021-2032, (USD Million) & (K Units), (based on production site)

Global Pellet Mill Mould consumption by region & country, CAGR, 2021-2032 & (K Units)

U.S. VS China: Pellet Mill Mould domestic production, consumption, key domestic manufacturers and share

Global Pellet Mill Mould production by manufacturer, production, price, value and market share 2021-2026, (USD Million) & (K Units)

Global Pellet Mill Mould production by Type, production, value, CAGR, 2021-2032, (USD Million) & (K Units)

Global Pellet Mill Mould production by Application, production, value, CAGR, 2021-2032, (USD Million) & (K Units)

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This report profiles key players in the global Pellet Mill Mould 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 ANDRITZ, CPM, Bühler, SALMATEC, La Meccanica, MÜNCH-Edelstahl, Lark Engineering, General Dies, Mabrik, Pelleting Consumables Europe, 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 Pellet Mill Mould market

Detailed Segmentation:

Each section contains quantitative market data including market by value (US$ Millions), volume (production, consumption) & (K Units) and average price (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 Pellet Mill Mould Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

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Rest of World

Market Segmentation

Global Pellet Mill Mould Market, Segmentation by Type:

Ring Die

Flat Die

Global Pellet Mill Mould Market, Segmentation by Die Material:

High-Chromium Steel Die

Case-Hardened Alloy Steel Die

Others

Global Pellet Mill Mould Market, Segmentation by Die Hole Diameter:

? 2 mm

> 2 mm - < 6 mm

? 6 mm

Global Pellet Mill Mould Market, Segmentation by Application:

Animal Feed

Aquafeed

Biomass and Biofuel

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Others

Companies Profiled:

ANDRITZ

CPM

Bühler

SALMATEC

La Meccanica

MÜNCH-Edelstahl

Lark Engineering

General Dies

Mabrik

Pelleting Consumables Europe

Colorado Mill Equipment

ATLIBRON

RSMCO

Orion Engineering Works

Jumeila

Zhengchang

Tianhe Feed Machinery

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Sichuan Meishan Jinding Machinery Mould

FDSP

Hongxing Machinery

Hanpai Mould

GEMCO

Key Questions Answered

1. How big is the global Pellet Mill Mould market?
2. What is the demand of the global Pellet Mill Mould market?
3. What is the year over year growth of the global Pellet Mill Mould market?
4. What is the total value of the global Pellet Mill Mould market?
5. Who are the Major Players in the global Pellet Mill Mould market?
6. What are the growth factors driving the market demand?

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Contents

1 SUPPLY SUMMARY

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

2 DEMAND SUMMARY

2.1 World Pellet Mill Mould Demand (2021-2032)
2.2 World Pellet Mill Mould Consumption by Region
  2.2.1 World Pellet Mill Mould Consumption by Region (2021-2026)
  2.2.2 World Pellet Mill Mould Consumption Forecast by Region (2027-2032)
2.3 United States Pellet Mill Mould Consumption (2021-2032)
2.4 China Pellet Mill Mould Consumption (2021-2032)
2.5 Europe Pellet Mill Mould Consumption (2021-2032)
2.6 Japan Pellet Mill Mould Consumption (2021-2032)
2.7 South Korea Pellet Mill Mould Consumption (2021-2032)
2.8 ASEAN Pellet Mill Mould Consumption (2021-2032)
2.9 India Pellet Mill Mould Consumption (2021-2032)

3 WORLD MANUFACTURERS COMPETITIVE ANALYSIS

3.1 World Pellet Mill Mould Production Value by Manufacturer (2021-2026)
3.2 World Pellet Mill Mould Production by Manufacturer (2021-2026)

+357 96 030922
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3.3 World Pellet Mill Mould Average Price by Manufacturer (2021-2026)
3.4 Pellet Mill Mould Company Evaluation Quadrant
3.5 Industry Rank and Concentration Rate (CR)
  3.5.1 Global Pellet Mill Mould Industry Rank of Major Manufacturers
  3.5.2 Global Concentration Ratios (CR4) for Pellet Mill Mould in 2025
  3.5.3 Global Concentration Ratios (CR8) for Pellet Mill Mould in 2025
3.6 Pellet Mill Mould Market: Overall Company Footprint Analysis
  3.6.1 Pellet Mill Mould Market: Region Footprint
  3.6.2 Pellet Mill Mould Market: Company Product Type Footprint
  3.6.3 Pellet Mill Mould 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: Pellet Mill Mould Production Value Comparison
  4.1.1 United States VS China: Pellet Mill Mould Production Value Comparison (2021 & 2025 & 2032)
  4.1.2 United States VS China: Pellet Mill Mould Production Value Market Share Comparison (2021 & 2025 & 2032)
4.2 United States VS China: Pellet Mill Mould Production Comparison
  4.2.1 United States VS China: Pellet Mill Mould Production Comparison (2021 & 2025 & 2032)
  4.2.2 United States VS China: Pellet Mill Mould Production Market Share Comparison (2021 & 2025 & 2032)
4.3 United States VS China: Pellet Mill Mould Consumption Comparison
  4.3.1 United States VS China: Pellet Mill Mould Consumption Comparison (2021 & 2025 & 2032)
  4.3.2 United States VS China: Pellet Mill Mould Consumption Market Share Comparison (2021 & 2025 & 2032)
4.4 United States Based Pellet Mill Mould Manufacturers and Market Share, 2021-2026
  4.4.1 United States Based Pellet Mill Mould Manufacturers, Headquarters and Production Site (States, Country)
  4.4.2 United States Based Manufacturers Pellet Mill Mould Production Value (2021-2026)

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4.4.3 United States Based Manufacturers Pellet Mill Mould Production (2021-2026)
4.5 China Based Pellet Mill Mould Manufacturers and Market Share
4.5.1 China Based Pellet Mill Mould Manufacturers, Headquarters and Production Site (Province, Country)
4.5.2 China Based Manufacturers Pellet Mill Mould Production Value (2021-2026)
4.5.3 China Based Manufacturers Pellet Mill Mould Production (2021-2026)
4.6 Rest of World Based Pellet Mill Mould Manufacturers and Market Share, 2021-2026
4.6.1 Rest of World Based Pellet Mill Mould Manufacturers, Headquarters and Production Site (State, Country)
4.6.2 Rest of World Based Manufacturers Pellet Mill Mould Production Value (2021-2026)
4.6.3 Rest of World Based Manufacturers Pellet Mill Mould Production (2021-2026)

5 MARKET ANALYSIS BY TYPE

5.1 World Pellet Mill Mould Market Size Overview by Type: 2021 VS 2025 VS 2032
5.2 Segment Introduction by Type
5.2.1 Ring Die
5.2.2 Flat Die
5.3 Market Segment by Type
5.3.1 World Pellet Mill Mould Production by Type (2021-2032)
5.3.2 World Pellet Mill Mould Production Value by Type (2021-2032)
5.3.3 World Pellet Mill Mould Average Price by Type (2021-2032)

6 MARKET ANALYSIS BY DIE MATERIAL

6.1 World Pellet Mill Mould Market Size Overview by Die Material: 2021 VS 2025 VS 2032
6.2 Segment Introduction by Die Material
6.2.1 High-Chromium Steel Die
6.2.2 Case-Hardened Alloy Steel Die
6.2.3 Others
6.3 Market Segment by Die Material
6.3.1 World Pellet Mill Mould Production by Die Material (2021-2032)
6.3.2 World Pellet Mill Mould Production Value by Die Material (2021-2032)
6.3.3 World Pellet Mill Mould Average Price by Die Material (2021-2032)

7 MARKET ANALYSIS BY DIE HOLE DIAMETER

+357 96 030922
info@marketpublishers.com

7.1 World Pellet Mill Mould Market Size Overview by Die Hole Diameter: 2021 VS 2025 VS 2032
7.2 Segment Introduction by Die Hole Diameter
7.2.1 ? 2 mm
7.2.2 > 2 mm - < 6 mm
7.2.3 ? 6 mm
7.3 Market Segment by Die Hole Diameter
7.3.1 World Pellet Mill Mould Production by Die Hole Diameter (2021-2032)
7.3.2 World Pellet Mill Mould Production Value by Die Hole Diameter (2021-2032)
7.3.3 World Pellet Mill Mould Average Price by Die Hole Diameter (2021-2032)

8 MARKET ANALYSIS BY APPLICATION

8.1 World Pellet Mill Mould Market Size Overview by Application: 2021 VS 2025 VS 2032
8.2 Segment Introduction by Application
8.2.1 Animal Feed
8.2.2 Aquafeed
8.2.3 Biomass and Biofuel
8.2.4 Others
8.3 Market Segment by Application
8.3.1 World Pellet Mill Mould Production by Application (2021-2032)
8.3.2 World Pellet Mill Mould Production Value by Application (2021-2032)
8.3.3 World Pellet Mill Mould Average Price by Application (2021-2032)

9 COMPANY PROFILES

9.1 ANDRITZ
9.1.1 ANDRITZ Details
9.1.2 ANDRITZ Major Business
9.1.3 ANDRITZ Pellet Mill Mould Product and Services
9.1.4 ANDRITZ Pellet Mill Mould Production, Price, Value, Gross Margin and Market Share (2021-2026)
9.1.5 ANDRITZ Recent Developments/Updates
9.1.6 ANDRITZ Competitive Strengths & Weaknesses
9.2 CPM
9.2.1 CPM Details
9.2.2 CPM Major Business
9.2.3 CPM Pellet Mill Mould Product and Services

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9.2.4 CPM Pellet Mill Mould Production, Price, Value, Gross Margin and Market Share (2021-2026)
9.2.5 CPM Recent Developments/Updates
9.2.6 CPM Competitive Strengths & Weaknesses
9.3 Bühler
9.3.1 Bühler Details
9.3.2 Bühler Major Business
9.3.3 Bühler Pellet Mill Mould Product and Services
9.3.4 Bühler Pellet Mill Mould Production, Price, Value, Gross Margin and Market Share (2021-2026)
9.3.5 Bühler Recent Developments/Updates
9.3.6 Bühler Competitive Strengths & Weaknesses
9.4 SALMATEC
9.4.1 SALMATEC Details
9.4.2 SALMATEC Major Business
9.4.3 SALMATEC Pellet Mill Mould Product and Services
9.4.4 SALMATEC Pellet Mill Mould Production, Price, Value, Gross Margin and Market Share (2021-2026)
9.4.5 SALMATEC Recent Developments/Updates
9.4.6 SALMATEC Competitive Strengths & Weaknesses
9.5 La Meccanica
9.5.1 La Meccanica Details
9.5.2 La Meccanica Major Business
9.5.3 La Meccanica Pellet Mill Mould Product and Services
9.5.4 La Meccanica Pellet Mill Mould Production, Price, Value, Gross Margin and Market Share (2021-2026)
9.5.5 La Meccanica Recent Developments/Updates
9.5.6 La Meccanica Competitive Strengths & Weaknesses
9.6 MÜNCH-Edelstahl
9.6.1 MÜNCH-Edelstahl Details
9.6.2 MÜNCH-Edelstahl Major Business
9.6.3 MÜNCH-Edelstahl Pellet Mill Mould Product and Services
9.6.4 MÜNCH-Edelstahl Pellet Mill Mould Production, Price, Value, Gross Margin and Market Share (2021-2026)
9.6.5 MÜNCH-Edelstahl Recent Developments/Updates
9.6.6 MÜNCH-Edelstahl Competitive Strengths & Weaknesses
9.7 Lark Engineering
9.7.1 Lark Engineering Details
9.7.2 Lark Engineering Major Business

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9.7.3 Lark Engineering Pellet Mill Mould Product and Services
9.7.4 Lark Engineering Pellet Mill Mould Production, Price, Value, Gross Margin and Market Share (2021-2026)
9.7.5 Lark Engineering Recent Developments/Updates
9.7.6 Lark Engineering Competitive Strengths & Weaknesses
9.8 General Dies
9.8.1 General Dies Details
9.8.2 General Dies Major Business
9.8.3 General Dies Pellet Mill Mould Product and Services
9.8.4 General Dies Pellet Mill Mould Production, Price, Value, Gross Margin and Market Share (2021-2026)
9.8.5 General Dies Recent Developments/Updates
9.8.6 General Dies Competitive Strengths & Weaknesses
9.9 Mabrik
9.9.1 Mabrik Details
9.9.2 Mabrik Major Business
9.9.3 Mabrik Pellet Mill Mould Product and Services
9.9.4 Mabrik Pellet Mill Mould Production, Price, Value, Gross Margin and Market Share (2021-2026)
9.9.5 Mabrik Recent Developments/Updates
9.9.6 Mabrik Competitive Strengths & Weaknesses
9.10 Pelleting Consumables Europe
9.10.1 Pelleting Consumables Europe Details
9.10.2 Pelleting Consumables Europe Major Business
9.10.3 Pelleting Consumables Europe Pellet Mill Mould Product and Services
9.10.4 Pelleting Consumables Europe Pellet Mill Mould Production, Price, Value, Gross Margin and Market Share (2021-2026)
9.10.5 Pelleting Consumables Europe Recent Developments/Updates
9.10.6 Pelleting Consumables Europe Competitive Strengths & Weaknesses
9.11 Colorado Mill Equipment
9.11.1 Colorado Mill Equipment Details
9.11.2 Colorado Mill Equipment Major Business
9.11.3 Colorado Mill Equipment Pellet Mill Mould Product and Services
9.11.4 Colorado Mill Equipment Pellet Mill Mould Production, Price, Value, Gross Margin and Market Share (2021-2026)
9.11.5 Colorado Mill Equipment Recent Developments/Updates
9.11.6 Colorado Mill Equipment Competitive Strengths & Weaknesses
9.12 ATLIBRON
9.12.1 ATLIBRON Details

+357 96 030922
info@marketpublishers.com

9.12.2 ATLIBRON Major Business
9.12.3 ATLIBRON Pellet Mill Mould Product and Services
9.12.4 ATLIBRON Pellet Mill Mould Production, Price, Value, Gross Margin and Market Share (2021-2026)
9.12.5 ATLIBRON Recent Developments/Updates
9.12.6 ATLIBRON Competitive Strengths & Weaknesses
9.13 RSMCO
9.13.1 RSMCO Details
9.13.2 RSMCO Major Business
9.13.3 RSMCO Pellet Mill Mould Product and Services
9.13.4 RSMCO Pellet Mill Mould Production, Price, Value, Gross Margin and Market Share (2021-2026)
9.13.5 RSMCO Recent Developments/Updates
9.13.6 RSMCO Competitive Strengths & Weaknesses
9.14 Orion Engineering Works
9.14.1 Orion Engineering Works Details
9.14.2 Orion Engineering Works Major Business
9.14.3 Orion Engineering Works Pellet Mill Mould Product and Services
9.14.4 Orion Engineering Works Pellet Mill Mould Production, Price, Value, Gross Margin and Market Share (2021-2026)
9.14.5 Orion Engineering Works Recent Developments/Updates
9.14.6 Orion Engineering Works Competitive Strengths & Weaknesses
9.15 Jumeila
9.15.1 Jumeila Details
9.15.2 Jumeila Major Business
9.15.3 Jumeila Pellet Mill Mould Product and Services
9.15.4 Jumeila Pellet Mill Mould Production, Price, Value, Gross Margin and Market Share (2021-2026)
9.15.5 Jumeila Recent Developments/Updates
9.15.6 Jumeila Competitive Strengths & Weaknesses
9.16 Zhengchang
9.16.1 Zhengchang Details
9.16.2 Zhengchang Major Business
9.16.3 Zhengchang Pellet Mill Mould Product and Services
9.16.4 Zhengchang Pellet Mill Mould Production, Price, Value, Gross Margin and Market Share (2021-2026)
9.16.5 Zhengchang Recent Developments/Updates
9.16.6 Zhengchang Competitive Strengths & Weaknesses
9.17 Tianhe Feed Machinery

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9.17.1 Tianhe Feed Machinery Details
9.17.2 Tianhe Feed Machinery Major Business
9.17.3 Tianhe Feed Machinery Pellet Mill Mould Product and Services
9.17.4 Tianhe Feed Machinery Pellet Mill Mould Production, Price, Value, Gross Margin and Market Share (2021-2026)
9.17.5 Tianhe Feed Machinery Recent Developments/Updates
9.17.6 Tianhe Feed Machinery Competitive Strengths & Weaknesses
9.18 Sichuan Meishan Jinding Machinery Mould
9.18.1 Sichuan Meishan Jinding Machinery Mould Details
9.18.2 Sichuan Meishan Jinding Machinery Mould Major Business
9.18.3 Sichuan Meishan Jinding Machinery Mould Pellet Mill Mould Product and Services
9.18.4 Sichuan Meishan Jinding Machinery Mould Pellet Mill Mould Production, Price, Value, Gross Margin and Market Share (2021-2026)
9.18.5 Sichuan Meishan Jinding Machinery Mould Recent Developments/Updates
9.18.6 Sichuan Meishan Jinding Machinery Mould Competitive Strengths & Weaknesses
9.19 FDSP
9.19.1 FDSP Details
9.19.2 FDSP Major Business
9.19.3 FDSP Pellet Mill Mould Product and Services
9.19.4 FDSP Pellet Mill Mould Production, Price, Value, Gross Margin and Market Share (2021-2026)
9.19.5 FDSP Recent Developments/Updates
9.19.6 FDSP Competitive Strengths & Weaknesses
9.20 Hongxing Machinery
9.20.1 Hongxing Machinery Details
9.20.2 Hongxing Machinery Major Business
9.20.3 Hongxing Machinery Pellet Mill Mould Product and Services
9.20.4 Hongxing Machinery Pellet Mill Mould Production, Price, Value, Gross Margin and Market Share (2021-2026)
9.20.5 Hongxing Machinery Recent Developments/Updates
9.20.6 Hongxing Machinery Competitive Strengths & Weaknesses
9.21 Hanpai Mould
9.21.1 Hanpai Mould Details
9.21.2 Hanpai Mould Major Business
9.21.3 Hanpai Mould Pellet Mill Mould Product and Services
9.21.4 Hanpai Mould Pellet Mill Mould Production, Price, Value, Gross Margin and Market Share (2021-2026)

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9.21.5 Hanpai Mould Recent Developments/Updates
9.21.6 Hanpai Mould Competitive Strengths & Weaknesses
9.22 GEMCO
9.22.1 GEMCO Details
9.22.2 GEMCO Major Business
9.22.3 GEMCO Pellet Mill Mould Product and Services
9.22.4 GEMCO Pellet Mill Mould Production, Price, Value, Gross Margin and Market Share (2021-2026)
9.22.5 GEMCO Recent Developments/Updates
9.22.6 GEMCO Competitive Strengths & Weaknesses

10 INDUSTRY CHAIN ANALYSIS

10.1 Pellet Mill Mould Industry Chain
10.2 Pellet Mill Mould Upstream Analysis
10.2.1 Pellet Mill Mould Core Raw Materials
10.2.2 Main Manufacturers of Pellet Mill Mould Core Raw Materials
10.3 Midstream Analysis
10.4 Downstream Analysis
10.5 Pellet Mill Mould Production Mode
10.6 Pellet Mill Mould Procurement Model
10.7 Pellet Mill Mould Industry Sales Model and Sales Channels
10.7.1 Pellet Mill Mould Sales Model
10.7.2 Pellet Mill Mould Typical Distributors

11 RESEARCH FINDINGS AND CONCLUSION

12 APPENDIX

12.1 Methodology
12.2 Research Process and Data Source
12.3 Disclaimer

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List Of Tables

LIST OF TABLES

Table 1. World Pellet Mill Mould Production Value by Region (2021, 2025 and 2032) & (USD Million)
Table 2. World Pellet Mill Mould Production Value by Region (2021-2026) & (USD Million)
Table 3. World Pellet Mill Mould Production Value by Region (2027-2032) & (USD Million)
Table 4. World Pellet Mill Mould Production Value Market Share by Region (2021-2026)
Table 5. World Pellet Mill Mould Production Value Market Share by Region (2027-2032)
Table 6. World Pellet Mill Mould Production by Region (2021-2026) & (K Units)
Table 7. World Pellet Mill Mould Production by Region (2027-2032) & (K Units)
Table 8. World Pellet Mill Mould Production Market Share by Region (2021-2026)
Table 9. World Pellet Mill Mould Production Market Share by Region (2027-2032)
Table 10. World Pellet Mill Mould Average Price by Region (2021-2026) & (US$/Unit)
Table 11. World Pellet Mill Mould Average Price by Region (2027-2032) & (US$/Unit)
Table 12. Pellet Mill Mould Major Market Trends
Table 13. World Pellet Mill Mould Consumption Growth Rate Forecast by Region (2021 & 2025 & 2032) & (K Units)
Table 14. World Pellet Mill Mould Consumption by Region (2021-2026) & (K Units)
Table 15. World Pellet Mill Mould Consumption Forecast by Region (2027-2032) & (K Units)
Table 16. World Pellet Mill Mould Production Value by Manufacturer (2021-2026) & (USD Million)
Table 17. Production Value Market Share of Key Pellet Mill Mould Producers in 2025
Table 18. World Pellet Mill Mould Production by Manufacturer (2021-2026) & (K Units)
Table 19. Production Market Share of Key Pellet Mill Mould Producers in 2025
Table 20. World Pellet Mill Mould Average Price by Manufacturer (2021-2026) & (US$/Unit)
Table 21. Global Pellet Mill Mould Company Evaluation Quadrant
Table 22. World Pellet Mill Mould Industry Rank of Major Manufacturers, Based on Production Value in 2025
Table 23. Head Office and Pellet Mill Mould Production Site of Key Manufacturer
Table 24. Pellet Mill Mould Market: Company Product Type Footprint
Table 25. Pellet Mill Mould Market: Company Product Application Footprint
Table 26. Pellet Mill Mould Competitive Factors
Table 27. Pellet Mill Mould New Entrant and Capacity Expansion Plans

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Table 28. Pellet Mill Mould Mergers & Acquisitions Activity
Table 29. United States VS China Pellet Mill Mould Production Value Comparison, (2021 & 2025 & 2032) & (USD Million)
Table 30. United States VS China Pellet Mill Mould Production Comparison, (2021 & 2025 & 2032) & (K Units)
Table 31. United States VS China Pellet Mill Mould Consumption Comparison, (2021 & 2025 & 2032) & (K Units)
Table 32. United States Based Pellet Mill Mould Manufacturers, Headquarters and Production Site (States, Country)
Table 33. United States Based Manufacturers Pellet Mill Mould Production Value, (2021-2026) & (USD Million)
Table 34. United States Based Manufacturers Pellet Mill Mould Production Value Market Share (2021-2026)
Table 35. United States Based Manufacturers Pellet Mill Mould Production (2021-2026) & (K Units)
Table 36. United States Based Manufacturers Pellet Mill Mould Production Market Share (2021-2026)
Table 37. China Based Pellet Mill Mould Manufacturers, Headquarters and Production Site (Province, Country)
Table 38. China Based Manufacturers Pellet Mill Mould Production Value, (2021-2026) & (USD Million)
Table 39. China Based Manufacturers Pellet Mill Mould Production Value Market Share (2021-2026)
Table 40. China Based Manufacturers Pellet Mill Mould Production, (2021-2026) & (K Units)
Table 41. China Based Manufacturers Pellet Mill Mould Production Market Share (2021-2026)
Table 42. Rest of World Based Pellet Mill Mould Manufacturers, Headquarters and Production Site (State, Country)
Table 43. Rest of World Based Manufacturers Pellet Mill Mould Production Value, (2021-2026) & (USD Million)
Table 44. Rest of World Based Manufacturers Pellet Mill Mould Production Value Market Share (2021-2026)
Table 45. Rest of World Based Manufacturers Pellet Mill Mould Production, (2021-2026) & (K Units)
Table 46. Rest of World Based Manufacturers Pellet Mill Mould Production Market Share (2021-2026)
Table 47. World Pellet Mill Mould Production Value by Type, (USD Million), 2021 & 2025 & 2032

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Table 48. World Pellet Mill Mould Production by Type (2021-2026) & (K Units)
Table 49. World Pellet Mill Mould Production by Type (2027-2032) & (K Units)
Table 50. World Pellet Mill Mould Production Value by Type (2021-2026) & (USD Million)
Table 51. World Pellet Mill Mould Production Value by Type (2027-2032) & (USD Million)
Table 52. World Pellet Mill Mould Average Price by Type (2021-2026) & (US$/Unit)
Table 53. World Pellet Mill Mould Average Price by Type (2027-2032) & (US$/Unit)
Table 54. World Pellet Mill Mould Production Value by Die Material, (USD Million), 2021 & 2025 & 2032
Table 55. World Pellet Mill Mould Production by Die Material (2021-2026) & (K Units)
Table 56. World Pellet Mill Mould Production by Die Material (2027-2032) & (K Units)
Table 57. World Pellet Mill Mould Production Value by Die Material (2021-2026) & (USD Million)
Table 58. World Pellet Mill Mould Production Value by Die Material (2027-2032) & (USD Million)
Table 59. World Pellet Mill Mould Average Price by Die Material (2021-2026) & (US$/Unit)
Table 60. World Pellet Mill Mould Average Price by Die Material (2027-2032) & (US$/Unit)
Table 61. World Pellet Mill Mould Production Value by Die Hole Diameter, (USD Million), 2021 & 2025 & 2032
Table 62. World Pellet Mill Mould Production by Die Hole Diameter (2021-2026) & (K Units)
Table 63. World Pellet Mill Mould Production by Die Hole Diameter (2027-2032) & (K Units)
Table 64. World Pellet Mill Mould Production Value by Die Hole Diameter (2021-2026) & (USD Million)
Table 65. World Pellet Mill Mould Production Value by Die Hole Diameter (2027-2032) & (USD Million)
Table 66. World Pellet Mill Mould Average Price by Die Hole Diameter (2021-2026) & (US$/Unit)
Table 67. World Pellet Mill Mould Average Price by Die Hole Diameter (2027-2032) & (US$/Unit)
Table 68. World Pellet Mill Mould Production Value by Application, (USD Million), 2021 & 2025 & 2032
Table 69. World Pellet Mill Mould Production by Application (2021-2026) & (K Units)
Table 70. World Pellet Mill Mould Production by Application (2027-2032) & (K Units)
Table 71. World Pellet Mill Mould Production Value by Application (2021-2026) & (USD

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Million)
Table 72. World Pellet Mill Mould Production Value by Application (2027-2032) & (USD Million)
Table 73. World Pellet Mill Mould Average Price by Application (2021-2026) & (US$/Unit)
Table 74. World Pellet Mill Mould Average Price by Application (2027-2032) & (US$/Unit)
Table 75. ANDRITZ Basic Information, Manufacturing Base and Competitors
Table 76. ANDRITZ Major Business
Table 77. ANDRITZ Pellet Mill Mould Product and Services
Table 78. ANDRITZ Pellet Mill Mould Production (K Units), Price (US$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
Table 79. ANDRITZ Recent Developments/Updates
Table 80. ANDRITZ Competitive Strengths & Weaknesses
Table 81. CPM Basic Information, Manufacturing Base and Competitors
Table 82. CPM Major Business
Table 83. CPM Pellet Mill Mould Product and Services
Table 84. CPM Pellet Mill Mould Production (K Units), Price (US$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
Table 85. CPM Recent Developments/Updates
Table 86. CPM Competitive Strengths & Weaknesses
Table 87. Bühler Basic Information, Manufacturing Base and Competitors
Table 88. Bühler Major Business
Table 89. Bühler Pellet Mill Mould Product and Services
Table 90. Bühler Pellet Mill Mould Production (K Units), Price (US$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
Table 91. Bühler Recent Developments/Updates
Table 92. Bühler Competitive Strengths & Weaknesses
Table 93. SALMATEC Basic Information, Manufacturing Base and Competitors
Table 94. SALMATEC Major Business
Table 95. SALMATEC Pellet Mill Mould Product and Services
Table 96. SALMATEC Pellet Mill Mould Production (K Units), Price (US$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
Table 97. SALMATEC Recent Developments/Updates
Table 98. SALMATEC Competitive Strengths & Weaknesses
Table 99. La Meccanica Basic Information, Manufacturing Base and Competitors
Table 100. La Meccanica Major Business
Table 101. La Meccanica Pellet Mill Mould Product and Services
Table 102. La Meccanica Pellet Mill Mould Production (K Units), Price (US$/Unit),

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Production Value (USD Million), Gross Margin and Market Share (2021-2026)
Table 103. La Meccanica Recent Developments/Updates
Table 104. La Meccanica Competitive Strengths & Weaknesses
Table 105. MÜNCH-Edelstahl Basic Information, Manufacturing Base and Competitors
Table 106. MÜNCH-Edelstahl Major Business
Table 107. MÜNCH-Edelstahl Pellet Mill Mould Product and Services
Table 108. MÜNCH-Edelstahl Pellet Mill Mould Production (K Units), Price (US$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
Table 109. MÜNCH-Edelstahl Recent Developments/Updates
Table 110. MÜNCH-Edelstahl Competitive Strengths & Weaknesses
Table 111. Lark Engineering Basic Information, Manufacturing Base and Competitors
Table 112. Lark Engineering Major Business
Table 113. Lark Engineering Pellet Mill Mould Product and Services
Table 114. Lark Engineering Pellet Mill Mould Production (K Units), Price (US$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
Table 115. Lark Engineering Recent Developments/Updates
Table 116. Lark Engineering Competitive Strengths & Weaknesses
Table 117. General Dies Basic Information, Manufacturing Base and Competitors
Table 118. General Dies Major Business
Table 119. General Dies Pellet Mill Mould Product and Services
Table 120. General Dies Pellet Mill Mould Production (K Units), Price (US$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
Table 121. General Dies Recent Developments/Updates
Table 122. General Dies Competitive Strengths & Weaknesses
Table 123. Mabrik Basic Information, Manufacturing Base and Competitors
Table 124. Mabrik Major Business
Table 125. Mabrik Pellet Mill Mould Product and Services
Table 126. Mabrik Pellet Mill Mould Production (K Units), Price (US$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
Table 127. Mabrik Recent Developments/Updates
Table 128. Mabrik Competitive Strengths & Weaknesses
Table 129. Pelleting Consumables Europe Basic Information, Manufacturing Base and Competitors
Table 130. Pelleting Consumables Europe Major Business
Table 131. Pelleting Consumables Europe Pellet Mill Mould Product and Services
Table 132. Pelleting Consumables Europe Pellet Mill Mould Production (K Units), Price (US$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
Table 133. Pelleting Consumables Europe Recent Developments/Updates

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Table 134. Pelleting Consumables Europe Competitive Strengths & Weaknesses
Table 135. Colorado Mill Equipment Basic Information, Manufacturing Base and Competitors
Table 136. Colorado Mill Equipment Major Business
Table 137. Colorado Mill Equipment Pellet Mill Mould Product and Services
Table 138. Colorado Mill Equipment Pellet Mill Mould Production (K Units), Price (US$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
Table 139. Colorado Mill Equipment Recent Developments/Updates
Table 140. Colorado Mill Equipment Competitive Strengths & Weaknesses
Table 141. ATLIBRON Basic Information, Manufacturing Base and Competitors
Table 142. ATLIBRON Major Business
Table 143. ATLIBRON Pellet Mill Mould Product and Services
Table 144. ATLIBRON Pellet Mill Mould Production (K Units), Price (US$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
Table 145. ATLIBRON Recent Developments/Updates
Table 146. ATLIBRON Competitive Strengths & Weaknesses
Table 147. RSMCO Basic Information, Manufacturing Base and Competitors
Table 148. RSMCO Major Business
Table 149. RSMCO Pellet Mill Mould Product and Services
Table 150. RSMCO Pellet Mill Mould Production (K Units), Price (US$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
Table 151. RSMCO Recent Developments/Updates
Table 152. RSMCO Competitive Strengths & Weaknesses
Table 153. Orion Engineering Works Basic Information, Manufacturing Base and Competitors
Table 154. Orion Engineering Works Major Business
Table 155. Orion Engineering Works Pellet Mill Mould Product and Services
Table 156. Orion Engineering Works Pellet Mill Mould Production (K Units), Price (US$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
Table 157. Orion Engineering Works Recent Developments/Updates
Table 158. Orion Engineering Works Competitive Strengths & Weaknesses
Table 159. Jumeila Basic Information, Manufacturing Base and Competitors
Table 160. Jumeila Major Business
Table 161. Jumeila Pellet Mill Mould Product and Services
Table 162. Jumeila Pellet Mill Mould Production (K Units), Price (US$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
Table 163. Jumeila Recent Developments/Updates

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Table 164. Jumeila Competitive Strengths & Weaknesses
Table 165. Zhengchang Basic Information, Manufacturing Base and Competitors
Table 166. Zhengchang Major Business
Table 167. Zhengchang Pellet Mill Mould Product and Services
Table 168. Zhengchang Pellet Mill Mould Production (K Units), Price (US$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
Table 169. Zhengchang Recent Developments/Updates
Table 170. Zhengchang Competitive Strengths & Weaknesses
Table 171. Tianhe Feed Machinery Basic Information, Manufacturing Base and Competitors
Table 172. Tianhe Feed Machinery Major Business
Table 173. Tianhe Feed Machinery Pellet Mill Mould Product and Services
Table 174. Tianhe Feed Machinery Pellet Mill Mould Production (K Units), Price (US$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
Table 175. Tianhe Feed Machinery Recent Developments/Updates
Table 176. Tianhe Feed Machinery Competitive Strengths & Weaknesses
Table 177. Sichuan Meishan Jinding Machinery Mould Basic Information, Manufacturing Base and Competitors
Table 178. Sichuan Meishan Jinding Machinery Mould Major Business
Table 179. Sichuan Meishan Jinding Machinery Mould Pellet Mill Mould Product and Services
Table 180. Sichuan Meishan Jinding Machinery Mould Pellet Mill Mould Production (K Units), Price (US$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
Table 181. Sichuan Meishan Jinding Machinery Mould Recent Developments/Updates
Table 182. Sichuan Meishan Jinding Machinery Mould Competitive Strengths & Weaknesses
Table 183. FDSP Basic Information, Manufacturing Base and Competitors
Table 184. FDSP Major Business
Table 185. FDSP Pellet Mill Mould Product and Services
Table 186. FDSP Pellet Mill Mould Production (K Units), Price (US$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
Table 187. FDSP Recent Developments/Updates
Table 188. FDSP Competitive Strengths & Weaknesses
Table 189. Hongxing Machinery Basic Information, Manufacturing Base and Competitors
Table 190. Hongxing Machinery Major Business
Table 191. Hongxing Machinery Pellet Mill Mould Product and Services

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Table 192. Hongxing Machinery Pellet Mill Mould Production (K Units), Price (US$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
Table 193. Hongxing Machinery Recent Developments/Updates
Table 194. Hongxing Machinery Competitive Strengths & Weaknesses
Table 195. Hanpai Mould Basic Information, Manufacturing Base and Competitors
Table 196. Hanpai Mould Major Business
Table 197. Hanpai Mould Pellet Mill Mould Product and Services
Table 198. Hanpai Mould Pellet Mill Mould Production (K Units), Price (US$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
Table 199. Hanpai Mould Recent Developments/Updates
Table 200. Hanpai Mould Competitive Strengths & Weaknesses
Table 201. GEMCO Basic Information, Manufacturing Base and Competitors
Table 202. GEMCO Major Business
Table 203. GEMCO Pellet Mill Mould Product and Services
Table 204. GEMCO Pellet Mill Mould Production (K Units), Price (US$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
Table 205. GEMCO Recent Developments/Updates
Table 206. GEMCO Competitive Strengths & Weaknesses
Table 207. Global Key Players of Pellet Mill Mould Upstream (Raw Materials)
Table 208. Global Pellet Mill Mould Typical Customers
Table 209. Pellet Mill Mould Typical Distributors

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List Of Figures

LIST OF FIGURES

Figure 1. Pellet Mill Mould Picture
Figure 2. World Pellet Mill Mould Production Value: 2021 & 2025 & 2032, (USD Million)
Figure 3. World Pellet Mill Mould Production Value and Forecast (2021-2032) & (USD Million)
Figure 4. World Pellet Mill Mould Production (2021-2032) & (K Units)
Figure 5. World Pellet Mill Mould Average Price (2021-2032) & (US$/Unit)
Figure 6. World Pellet Mill Mould Production Value Market Share by Region (2021-2032)
Figure 7. World Pellet Mill Mould Production Market Share by Region (2021-2032)
Figure 8. North America Pellet Mill Mould Production (2021-2032) & (K Units)
Figure 9. Europe Pellet Mill Mould Production (2021-2032) & (K Units)
Figure 10. China Pellet Mill Mould Production (2021-2032) & (K Units)
Figure 11. Pellet Mill Mould Market Drivers
Figure 12. Factors Affecting Demand
Figure 13. World Pellet Mill Mould Consumption (2021-2032) & (K Units)
Figure 14. World Pellet Mill Mould Consumption Market Share by Region (2021-2032)
Figure 15. United States Pellet Mill Mould Consumption (2021-2032) & (K Units)
Figure 16. China Pellet Mill Mould Consumption (2021-2032) & (K Units)
Figure 17. Europe Pellet Mill Mould Consumption (2021-2032) & (K Units)
Figure 18. Japan Pellet Mill Mould Consumption (2021-2032) & (K Units)
Figure 19. South Korea Pellet Mill Mould Consumption (2021-2032) & (K Units)
Figure 20. ASEAN Pellet Mill Mould Consumption (2021-2032) & (K Units)
Figure 21. India Pellet Mill Mould Consumption (2021-2032) & (K Units)
Figure 22. Producer Shipments of Pellet Mill Mould by Manufacturer Revenue ($MM) and Market Share (%): 2025
Figure 23. Global Four-firm Concentration Ratios (CR4) for Pellet Mill Mould Markets in 2025
Figure 24. Global Four-firm Concentration Ratios (CR8) for Pellet Mill Mould Markets in 2025
Figure 25. United States VS China: Pellet Mill Mould Production Value Market Share Comparison (2021 & 2025 & 2032)
Figure 26. United States VS China: Pellet Mill Mould Production Market Share Comparison (2021 & 2025 & 2032)
Figure 27. United States VS China: Pellet Mill Mould Consumption Market Share Comparison (2021 & 2025 & 2032)

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Figure 28. United States Based Manufacturers Pellet Mill Mould Production Market Share 2025
Figure 29. China Based Manufacturers Pellet Mill Mould Production Market Share 2025
Figure 30. Rest of World Based Manufacturers Pellet Mill Mould Production Market Share 2025
Figure 31. World Pellet Mill Mould Production Value by Type, (USD Million), 2021 & 2025 & 2032
Figure 32. World Pellet Mill Mould Production Value Market Share by Type in 2025
Figure 33. Ring Die
Figure 34. Flat Die
Figure 35. World Pellet Mill Mould Production Market Share by Type (2021-2032)
Figure 36. World Pellet Mill Mould Production Value Market Share by Type (2021-2032)
Figure 37. World Pellet Mill Mould Average Price by Type (2021-2032) & (US$/Unit)
Figure 38. World Pellet Mill Mould Production Value by Die Material, (USD Million), 2021 & 2025 & 2032
Figure 39. World Pellet Mill Mould Production Value Market Share by Die Material in 2025
Figure 40. High-Chromium Steel Die
Figure 41. Case-Hardened Alloy Steel Die
Figure 42. Others
Figure 43. World Pellet Mill Mould Production Market Share by Die Material (2021-2032)
Figure 44. World Pellet Mill Mould Production Value Market Share by Die Material (2021-2032)
Figure 45. World Pellet Mill Mould Average Price by Die Material (2021-2032) & (US$/Unit)
Figure 46. World Pellet Mill Mould Production Value by Die Hole Diameter, (USD Million), 2021 & 2025 & 2032
Figure 47. World Pellet Mill Mould Production Value Market Share by Die Hole Diameter in 2025
Figure 48. ? 2 mm
Figure 49. > 2 mm - < 6 mm
Figure 50. ? 6 mm
Figure 51. World Pellet Mill Mould Production Market Share by Die Hole Diameter (2021-2032)
Figure 52. World Pellet Mill Mould Production Value Market Share by Die Hole Diameter (2021-2032)
Figure 53. World Pellet Mill Mould Average Price by Die Hole Diameter (2021-2032) & (US$/Unit)
Figure 54. World Pellet Mill Mould Production Value by Application, (USD Million), 2021

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& 2025 & 2032
Figure 55. World Pellet Mill Mould Production Value Market Share by Application in 2025
Figure 56. Animal Feed
Figure 57. Aquafeed
Figure 58. Biomass and Biofuel
Figure 59. Others
Figure 60. World Pellet Mill Mould Production Market Share by Application (2021-2032)
Figure 61. World Pellet Mill Mould Production Value Market Share by Application (2021-2032)
Figure 62. World Pellet Mill Mould Average Price by Application (2021-2032) & (US$/Unit)
Figure 63. Pellet Mill Mould Industry Chain
Figure 64. Pellet Mill Mould Procurement Model
Figure 65. Pellet Mill Mould Sales Model
Figure 66. Pellet Mill Mould Sales Channels, Direct Sales, and Distribution
Figure 67. Methodology
Figure 68. Research Process and Data Source

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