

Global Pneumatic IS Machine Market 2026 by Manufacturers, Regions, Type and Application, Forecast to 2032

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Abstracts

According to our (Global Info Research) latest study, the global Pneumatic IS Machine market size was valued at US\$ 293 million in 2025 and is forecast to a readjusted size of US\$ 433 million by 2032 with a CAGR of 5.8% during review period.

A Pneumatic IS Machine, or pneumatic Individual Section Machine, is a glass container forming machine that mainly uses compressed air and pneumatic mechanisms to drive key forming motions. It is used to produce bottles, jars, vials, and other hollow glass containers. Each section works independently, receiving molten glass gobs and forming containers through blow-and-blow and press-and-blow. Compared with servo-electric IS machines, pneumatic IS machines have simpler structure, proven reliability, and lower investment cost, but they usually offer less motion precision and flexibility. Bucher Emhart describes AIS as a pneumatically driven IS machine category.

Global production capacity is approximately 200 units.

In 2025, global sales reached approximately 108 units, with an average price of around million US\$ 2.64 per unit, gross margin around 30%.

The Pneumatic IS Machine market will remain stable but relatively mature. New growth will mainly come from emerging-market capacity expansion, machine refurbishment, spare parts, section replacement, and modernization of existing pneumatic lines. Servo-electric systems will continue to gain share in high-end applications, but pneumatic IS machines will remain competitive where customers prioritize reliability, lower capital cost, easier maintenance, operator familiarity, and proven forming performance. Future competition will focus on pneumatic efficiency, valve control, compressed air

optimization, machine flexibility, electronic controls, retrofit capability, service response, and lifecycle cost. The market is unlikely to disappear quickly because the installed base remains large.

Market trend

The Pneumatic IS Machine market is mature, but it remains important because many container glass plants still operate pneumatic forming lines. The market trend is shifting from purely pneumatic systems toward hybrid upgrades, electronic timing, improved valve blocks, servo take-out mechanisms, better cooling, automatic lubrication, swabbing robots, and digital process monitoring. Advanced pneumatic IS machines continue to be used where customers need reliable performance, flexible gob production, and lower capital cost than full servo-electric systems. However, high-end plants are gradually adopting servo-electric NIS or hybrid systems for better repeatability, faster setup, and improved forming control.

Market drive

Market demand is driven by continuous glass packaging production for beer, wine, spirits, soft drinks, food, pharmaceuticals, cosmetics, and household products. Pneumatic IS machines are attractive because they are proven, durable, familiar to operators, and supported by a large installed base. They also provide a cost-effective solution for emerging-market glass plants and for producers that prefer machine rebuilding instead of full replacement. Compressed air remains critical in IS machine operations, and proper air pressure, air quality, and flow directly affect productivity, container quality, and scrap reduction. Replacement parts, upgrades, and refurbishment are therefore important demand drivers.

Upstream and downstream

Upstream suppliers include steel casting and precision machining companies, glass mold manufacturers, pneumatic valve suppliers, compressed air system providers, cylinders, sensors, lubrication systems, refractory parts, cooling components, control systems, and hot-end spare-part manufacturers. Machine producers integrate these parts into complete pneumatic forming systems or provide retrofit and rebuilding services. Downstream customers are mainly container glass manufacturers serving beverage, food, pharmaceutical, cosmetics, perfume, household chemical, and premium packaging brands. Typical downstream glass producers include O-I Glass, Ardagh Group, Verallia, Vidrala, Vetropack, Gerresheimer, Saverglass, BA Glass, Vitro,

and ?i?ecam. BDF lists O-I, Saverglass, ?i?ecam, Vetropack, and Vitro among key forming-business references.

This report is a detailed and comprehensive analysis for global Pneumatic IS Machine market. Both quantitative and qualitative analyses are presented by manufacturers, by region & country, by Type and by Application. As the market is constantly changing, this report explores the competition, supply and demand trends, as well as key factors that contribute to its changing demands across many markets. Company profiles and product examples of selected competitors, along with market share estimates of some of the selected leaders for the year 2025, are provided.

Key Features:

Global Pneumatic IS Machine market size and forecasts, in consumption value (\$ Million), sales quantity (Units), and average selling prices (K US\$/Unit), 2021-2032

Global Pneumatic IS Machine market size and forecasts by region and country, in consumption value (\$ Million), sales quantity (Units), and average selling prices (K US\$/Unit), 2021-2032

Global Pneumatic IS Machine market size and forecasts, by Type and by Application, in consumption value (\$ Million), sales quantity (Units), and average selling prices (K US\$/Unit), 2021-2032

Global Pneumatic IS Machine market shares of main players, shipments in revenue (\$ Million), sales quantity (Units), and ASP (K US\$/Unit), 2021-2026

The Primary Objectives in This Report Are:

- To determine the size of the total market opportunity of global and key countries

- To assess the growth potential for Pneumatic IS Machine

- To forecast future growth in each product and end-use market

- To assess competitive factors affecting the marketplace

This report profiles key players in the global Pneumatic IS Machine market based on the

following parameters - company overview, sales quantity, revenue, 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.

Market Segmentation

Pneumatic IS Machine market is split by Type and by Application. For the period 2021-2032, the growth among segments provides accurate calculations and forecasts for consumption value by Type, and by Application in terms of volume and value. This analysis can help you expand your business by targeting qualified niche markets.

Market segment by Type

Single Gob

Double Gob

Triple Gob

Others

Market segment by Molding

Blow & Blow

Press & Blow

Market segment by Classification

Below 10 Sections

Above 10 Sections

Market segment by Application

Food and Beverage

Pharmaceutical

Cosmetics and Personal Care

Chemical

Others

Major players covered

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.

Market segment by region, regional analysis covers

North America (United States, Canada, and Mexico)

Europe (Germany, France, United Kingdom, Russia, Italy, and Rest of Europe)

Asia-Pacific (China, Japan, Korea, India, Southeast Asia, and Australia)

South America (Brazil, Argentina, Colombia, and Rest of South America)

Middle East & Africa (Saudi Arabia, UAE, Egypt, South Africa, and Rest of Middle East & Africa)

The content of the study subjects, includes a total of 15 chapters:

Chapter 1, to describe Pneumatic IS Machine product scope, market overview, market estimation caveats and base year.

Chapter 2, to profile the top manufacturers of Pneumatic IS Machine, with price, sales quantity, revenue, and global market share of Pneumatic IS Machine from 2021 to 2026.

Chapter 3, the Pneumatic IS Machine competitive situation, sales quantity, revenue, and global market share of top manufacturers are analyzed emphatically by landscape contrast.

Chapter 4, the Pneumatic IS Machine breakdown data are shown at the regional level, to show the sales quantity, consumption value, and growth by regions, from 2021 to 2032.

Chapter 5 and 6, to segment the sales by Type and by Application, with sales market share and growth rate by Type, by Application, from 2021 to 2032.

Chapter 7, 8, 9, 10 and 11, to break the sales data at the country level, with sales quantity, consumption value, and market share for key countries in the world, from 2021 to 2026. and Pneumatic IS Machine market forecast, by regions, by Type, and by Application, with sales and revenue, from 2027 to 2032.

Chapter 12, market dynamics, drivers, restraints, trends, and Porters Five Forces analysis.

Chapter 13, the key raw materials and key suppliers, and industry chain of Pneumatic IS Machine.

Chapter 14 and 15, to describe Pneumatic IS Machine sales channel, distributors, customers, research findings and conclusion.

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