

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

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Abstracts

The global Pneumatic IS Machine market size is expected to reach \$ 433 million by 2032, rising at a market growth of 5.8% CAGR during the forecast period (2026-2032).

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 studies the global Pneumatic IS Machine production, demand, key manufacturers, and key regions.

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

Highlights and key features of the study

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

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

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

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

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

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

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

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

This report profiles key players in the global Pneumatic 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 Pneumatic 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 Pneumatic IS Machine Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Global Pneumatic IS Machine Market, Segmentation by Type:

Single Gob

Double Gob

Triple Gob

Others

Global Pneumatic IS Machine Market, Segmentation by Molding:

Blow & Blow

Press & Blow

Global Pneumatic IS Machine Market, Segmentation by Classification:

Below 10 Sections

Above 10 Sections

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

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