

Global IS Forming Machines Market Growth 2026-2032

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Abstracts

The global IS Forming Machines market size is predicted to grow from US\$ 842 million in 2025 to US\$ 1296 million in 2032; it is expected to grow at a CAGR of 6.5% from 2026 to 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.

LP Information, Inc. (LPI) ' newest research report, the 'IS Forming Machines Industry Forecast' looks at past sales and reviews total world IS Forming Machines sales in

2025, providing a comprehensive analysis by region and market sector of projected IS Forming Machines sales for 2026 through 2032. With IS Forming Machines sales broken down by region, market sector and sub-sector, this report provides a detailed analysis in US\$ millions of the world IS Forming Machines industry.

This Insight Report provides a comprehensive analysis of the global IS Forming Machines landscape and highlights key trends related to product segmentation, company formation, revenue, and market share, latest development, and M&A activity. This report also analyzes the strategies of leading global companies with a focus on IS Forming Machines portfolios and capabilities, market entry strategies, market positions, and geographic footprints, to better understand these firms' unique position in an accelerating global IS Forming Machines market.

This Insight Report evaluates the key market trends, drivers, and affecting factors shaping the global outlook for IS Forming Machines and breaks down the forecast by Type, by Application, geography, and market size to highlight emerging pockets of opportunity. With a transparent methodology based on hundreds of bottom-up qualitative and quantitative market inputs, this study forecast offers a highly nuanced view of the current state and future trajectory in the global IS Forming Machines.

This report presents a comprehensive overview, market shares, and growth opportunities of IS Forming Machines market by product type, application, key manufacturers and key regions and countries.

Segmentation by Type:

Single Gob

Double Gob

Triple Gob

Others

Segmentation by Molding:

Blow & Blow

Press & Blow

Segmentation by Classification:

Mechanical

Electronic

Segmentation by Application:

Food and Beverage

Pharmaceutical

Cosmetics and Personal Care

Chemical

Others

This report also splits the market by region:

Americas

United States

Canada

Mexico

Brazil

APAC

China

Japan

Korea

Southeast Asia

India

Australia

Europe

Germany

France

UK

Italy

Russia

Middle East & Africa

Egypt

South Africa

Israel

Turkey

GCC Countries

The below companies that are profiled have been selected based on inputs gathered from primary experts and analysing the company's coverage, product portfolio, its market penetration.

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 Addressed in this Report

What is the 10-year outlook for the global IS Forming Machines market?

What factors are driving IS Forming Machines market growth, globally and by region?

Which technologies are poised for the fastest growth by market and region?

How do IS Forming Machines market opportunities vary by end market size?

How does IS Forming Machines break out by Type, by Application?

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