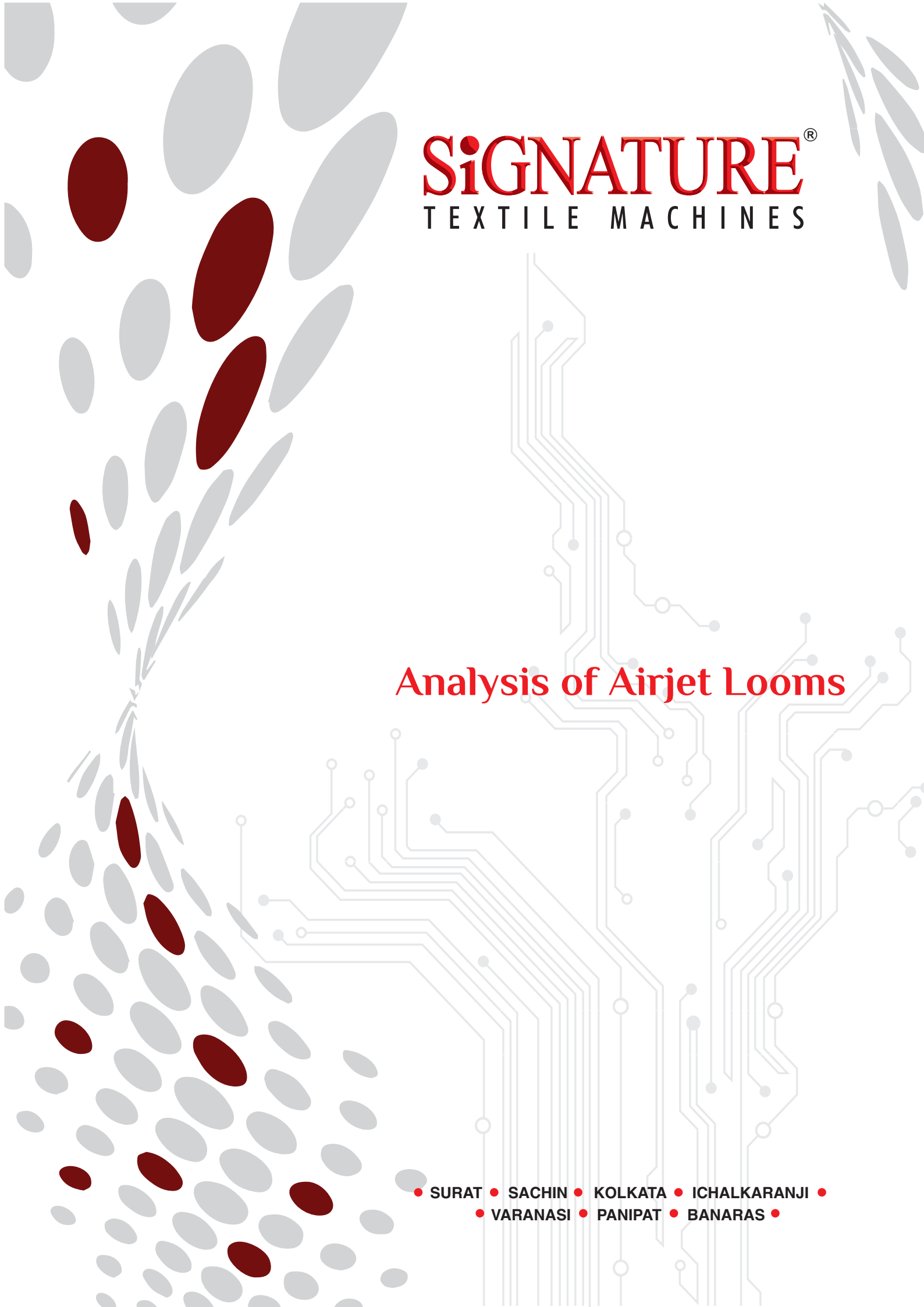




SiGNATURE[®]
TEXTILE MACHINES

Analysis of Airjet Looms

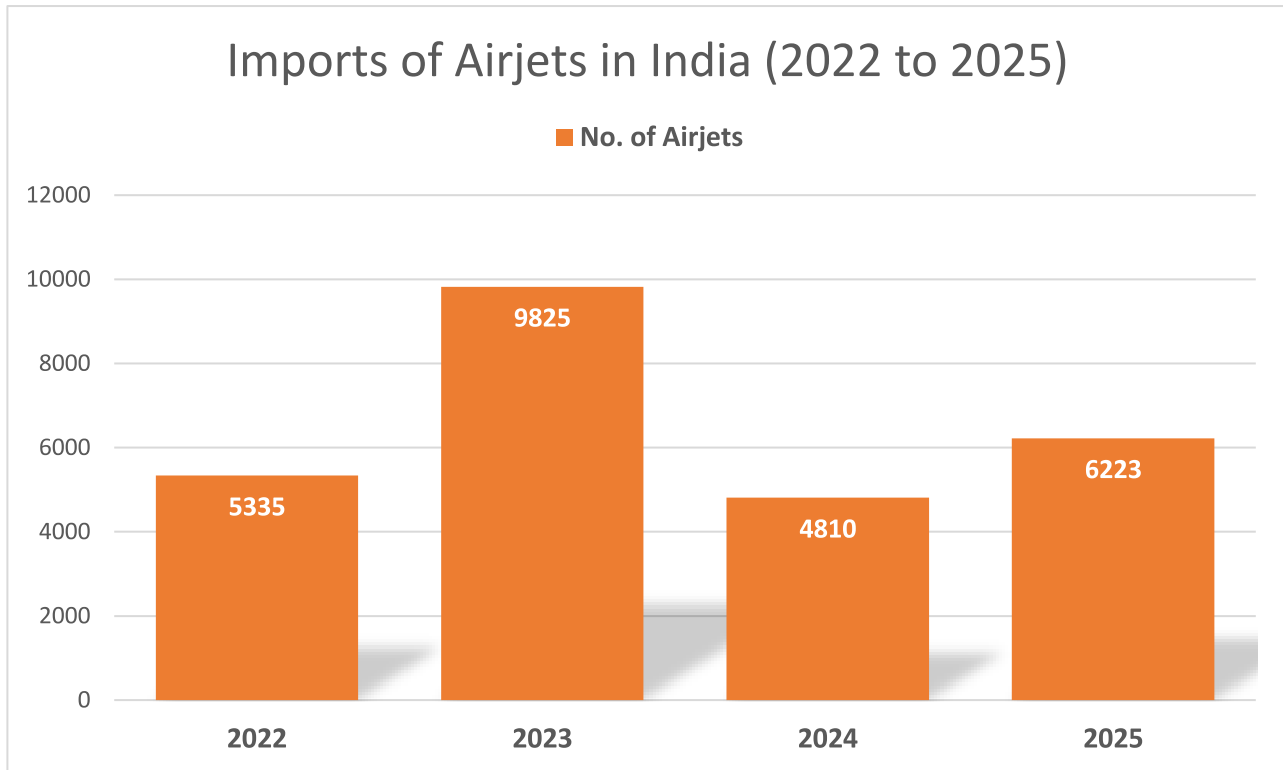
• SURAT • SACHIN • KOLKATA • ICHALKARANJI •
• VARANASI • PANIPAT • BANARAS •

Introduction

The global textile industry is undergoing a significant transformation, and India—particularly Surat—is emerging as a key player in this shifting landscape. Historically, China has dominated the production of woven fabric, fulfilling a substantial portion of global clothing demand. However, with rising labor costs and a rapidly aging population, China is increasingly challenged in maintaining its previous production volumes and competitive pricing.

- **China's Decline:** Rising labor costs and an aging population are reducing China's ability to produce affordable woven fabric at scale.
- **Global Supply Gap:** Other countries like Bangladesh, Vietnam, and Pakistan are trying to fill this void but lack the capacity to meet global demand.
- **India's Opportunity:** With abundant resources, industrial strength, and a growing textile base, India is well-positioned to capture this opportunity.
- **Surat's Strategic Role:** India currently imports ~8,000 airjets and ~11,000 waterjets annually, and Surat is expected to lead a multi-decade growth in weaving machine demand.
- **Market Outlook:** Rapid expansion of Surat's garment industry is set to push fabric demand even higher, making India and Surat promising markets for future airjet and waterjet sales.

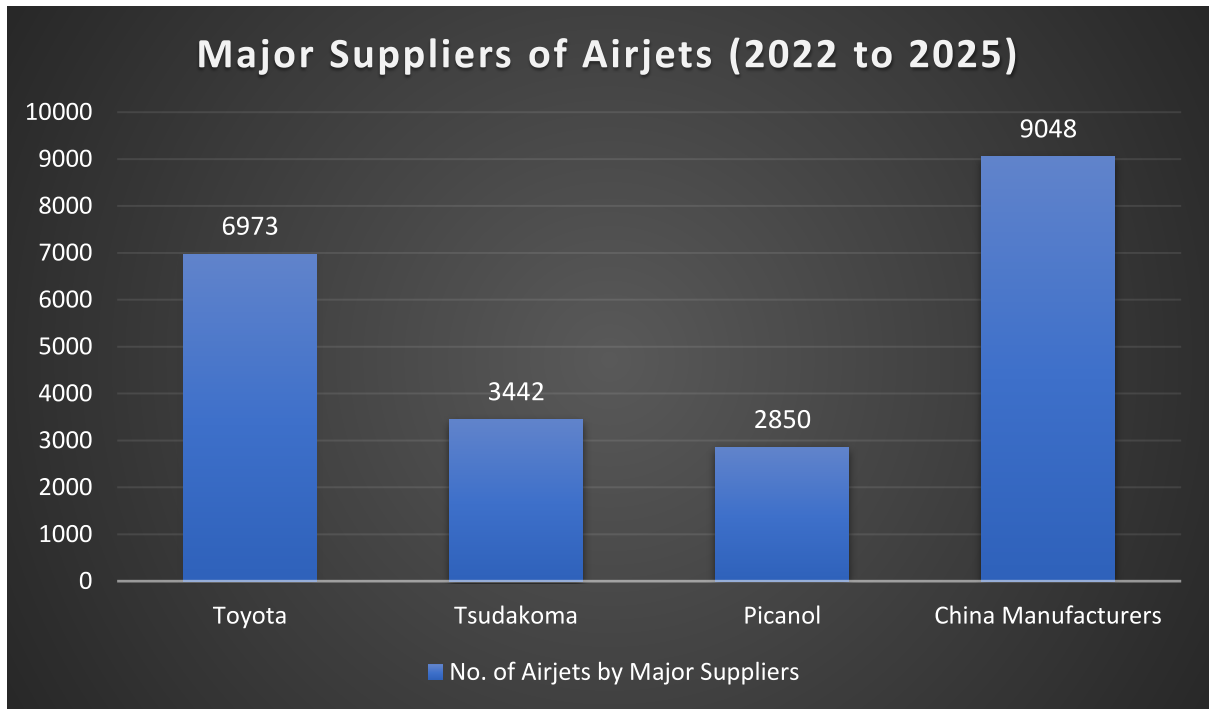
Airjets Imports in India – 2022 to 2025



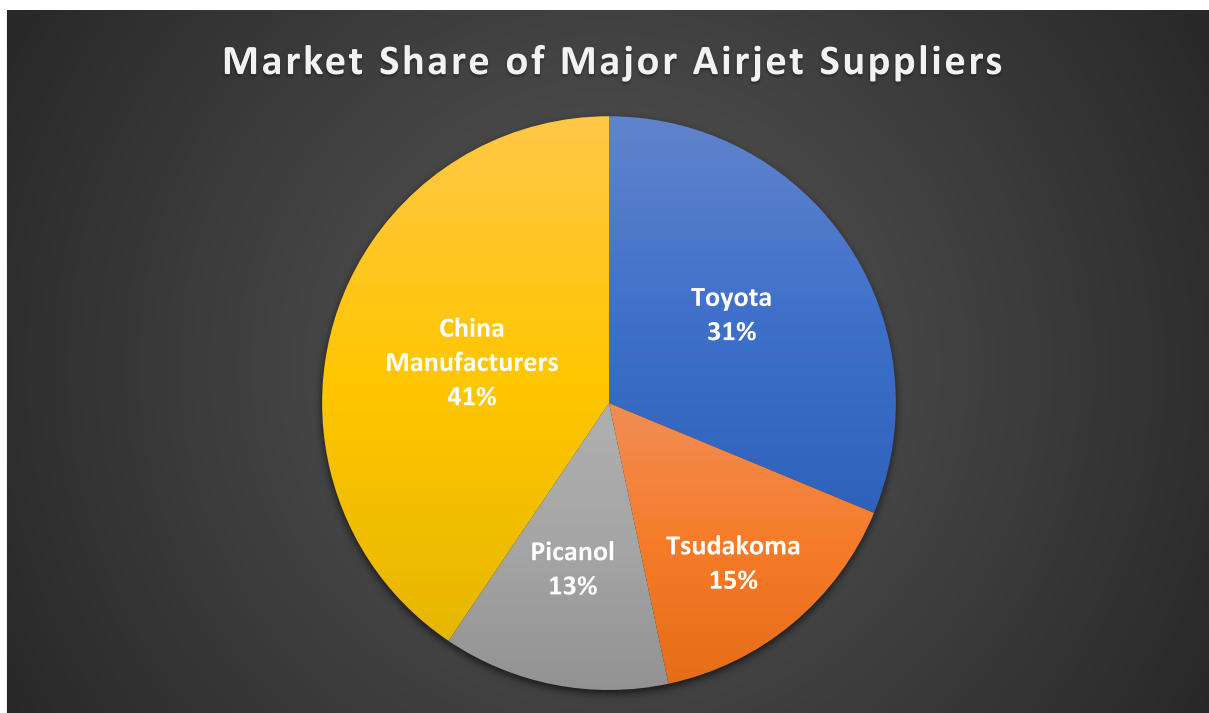
The graph above highlights the following points:

- Airjet sales picked up sharply in 2023
- However, with the realization that polyester fabrics do not offer similar profits as the cotton fabrics, sales dipped
- Airjet sales are now increasing at a steady pace as specialized weavers are now entering the market with right channels of sale

Major Suppliers of Airjets to India (2022 to 2025)



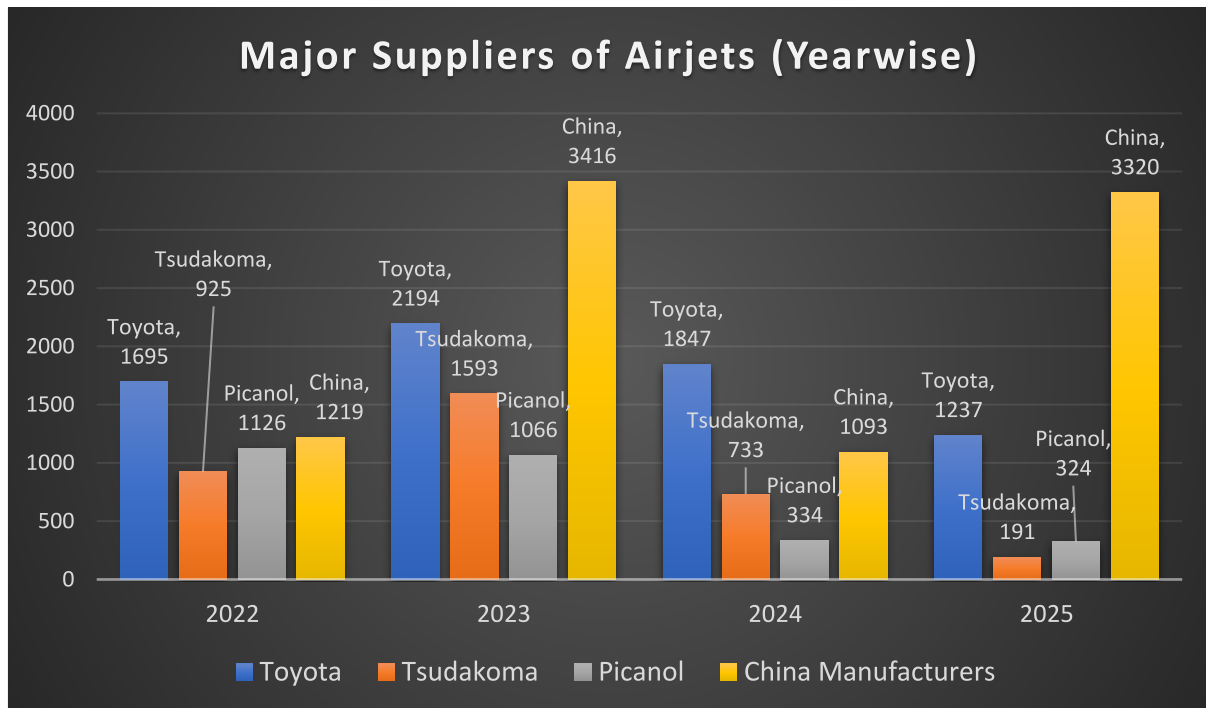
Market Share of Major Suppliers of Airjets to India (2022 to 2025)



The charts above show the imports and therefore the sales by major airjet manufacturers. More specifically, they show:

- The market share of each major supplier
- Toyota evolves as the largest supplier overall, whereas Red Flag evolves as the largest Chinese manufacturer
- However, Toyota and Tsudakoma are more popular in other parts of India such as Ichalkaranji. The reason for this is that the Surat market is highly price sensitive

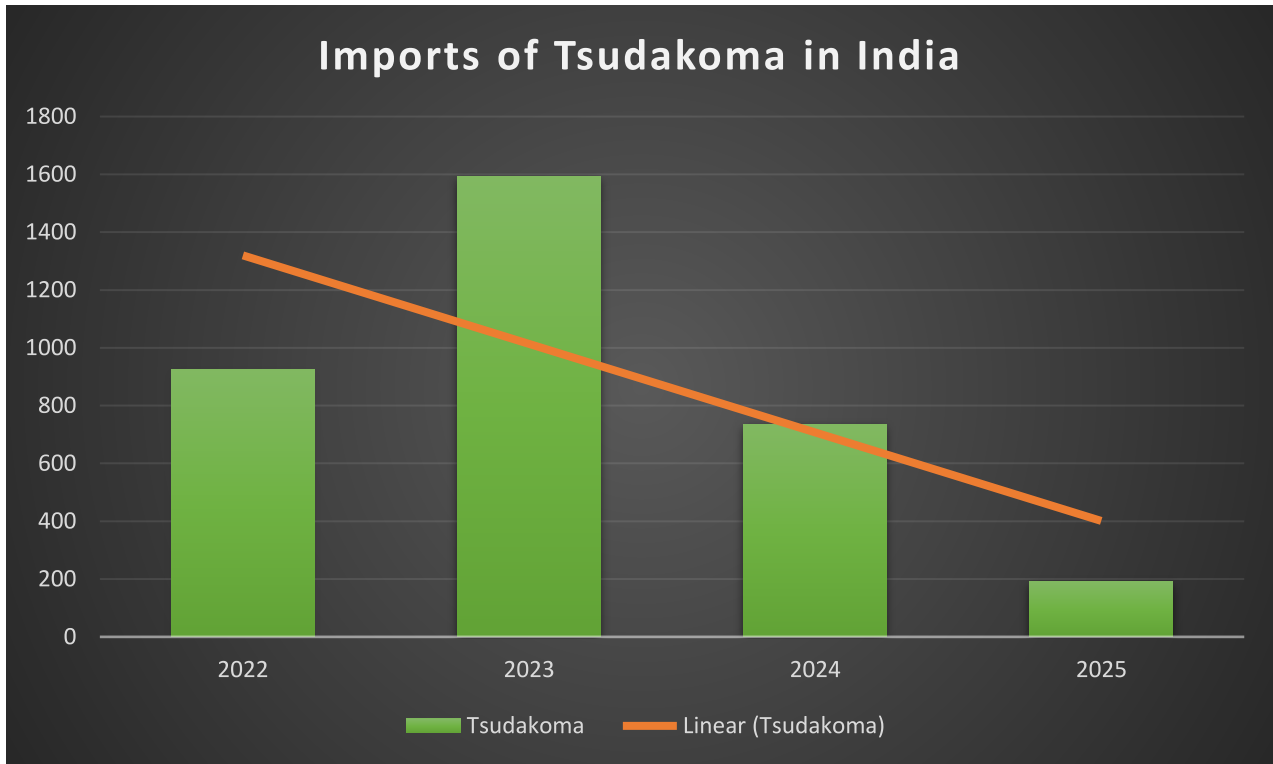
Below, we will also see the imports by these major suppliers as segregated by year of import:



The above chart highlights the following :

- Major suppliers such as Toyota, Tsudakoma, and Picanol are facing decreasing demand year-on-year
- This is because Chinese machines, which are more economical are on the rise
- Surat is entering the weaving market at a fast pace due to the availability of economic options provided by brands such as Redflag, XY, Baijia, etc.
- The presence of immature weavers in 2023 can be confirmed by looking at the sales of Redflag airjets in the market

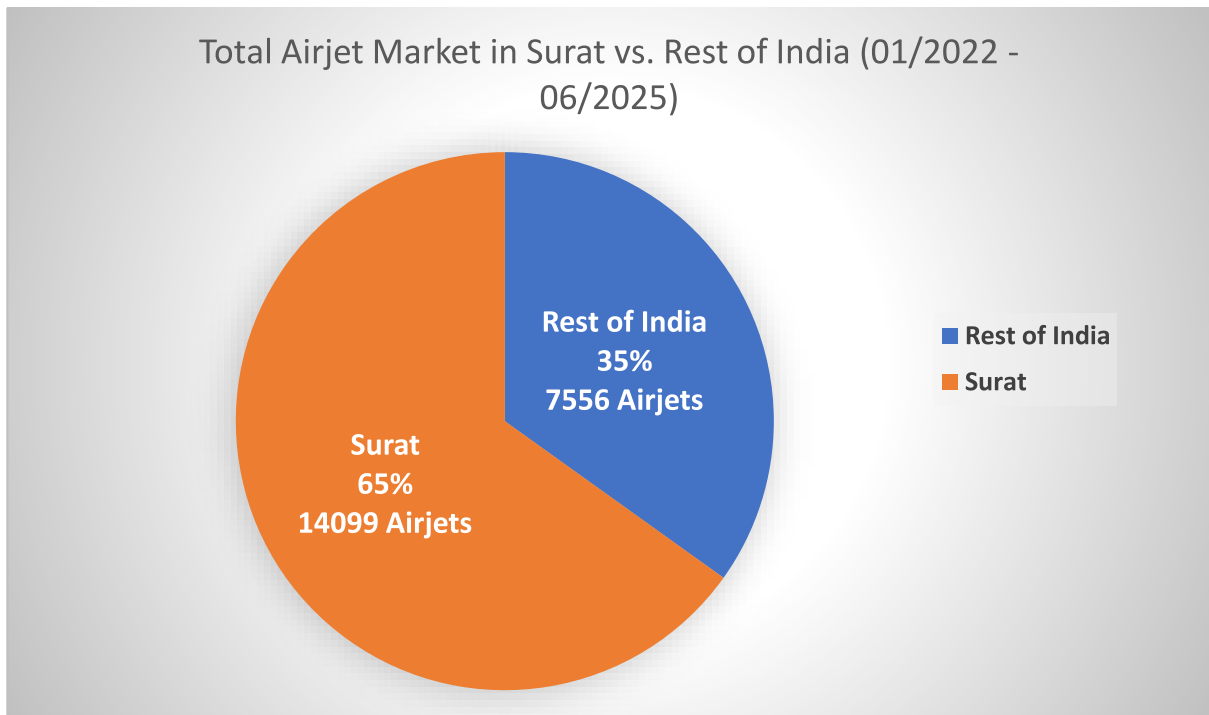
Imports of Tsudakoma in India



From the above diagram, we can see that Tsudakoma is facing a decline in imports in India. With the right sales strategy, this picture can change starkly.

Total Airjet Imports in Surat vs. Rest of India

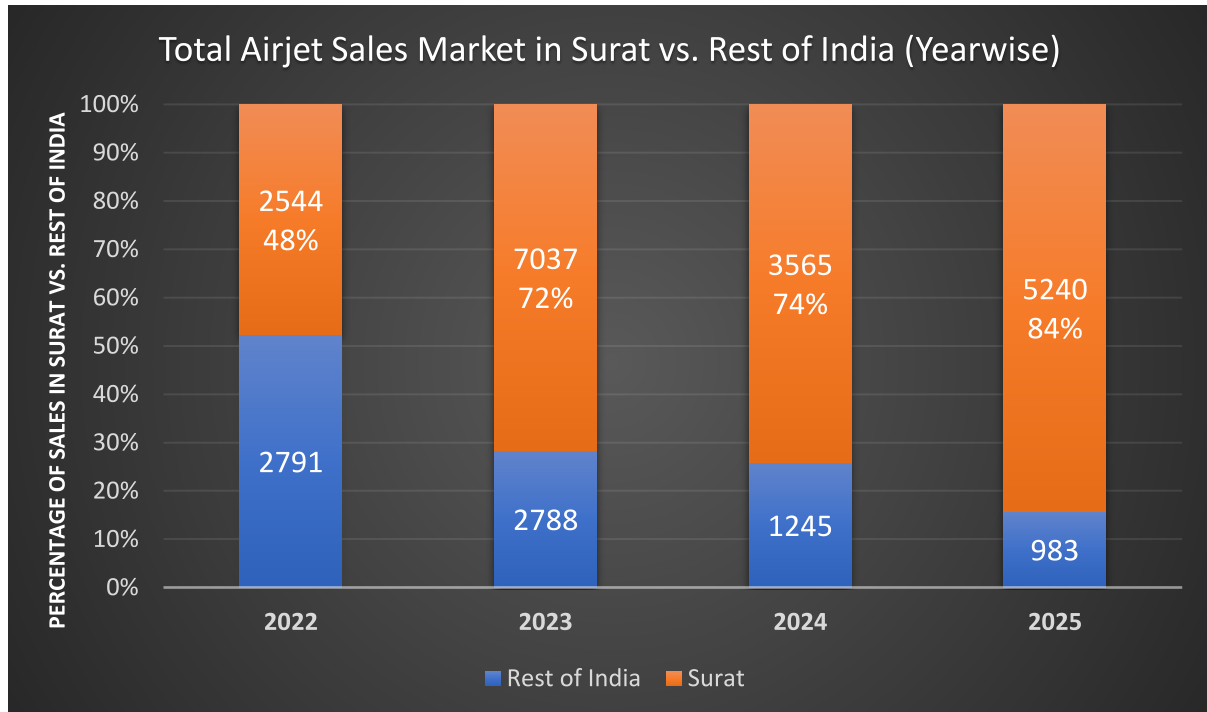
We will now compare how the Surat market is taking leaps and bounds to enter the weaving sector in airjets:



The graph above highlights the overall market share of Surat in the airjet weaving market. The time period highlighted in this graph is from January 2022 to June 2025.

Next, we will look at the share of Surat in this market, year-after-year:

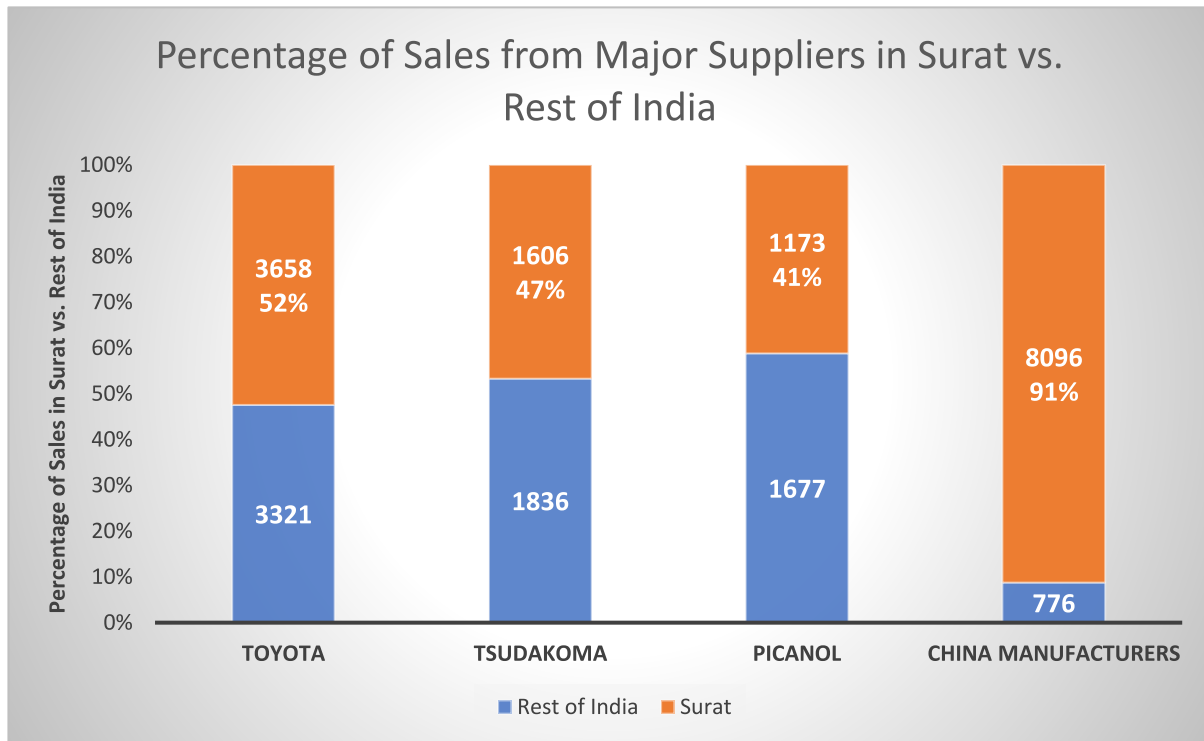
Airjet Sales in Surat Market vs. Rest of India



In the graph above, the following points are highlighted:

- Surat is becoming an all-important hub for airjet weaving machines
- The garment industry in Surat is in the middle a huge boom, thus pushing demand for airjet woven fabric
- The market share for of Surat in airjet imports has jumped from 48% to 84% in a matter of 4 years

Percentage of Sales from Major Suppliers in Surat vs. Rest of India



The above graph highlights the following points:

- All major manufacturers such as Toyota, Tsudakoma, and Picanol have market shares in other parts of India
- China manufacturers have a stronghold on the Surat market based solely on price
- The Surat market is expected to continue growing with major quantities up for grabs
- If the rapier market is any indicator, the Surat market accounts for over 90% market share in high speed rapier looms
- There is ample scope for Tsudakoma to capitalize on this growth and capture a chunk of sales in Surat

Conclusion

1. Surat is Emerging as India's Weaving Powerhouse

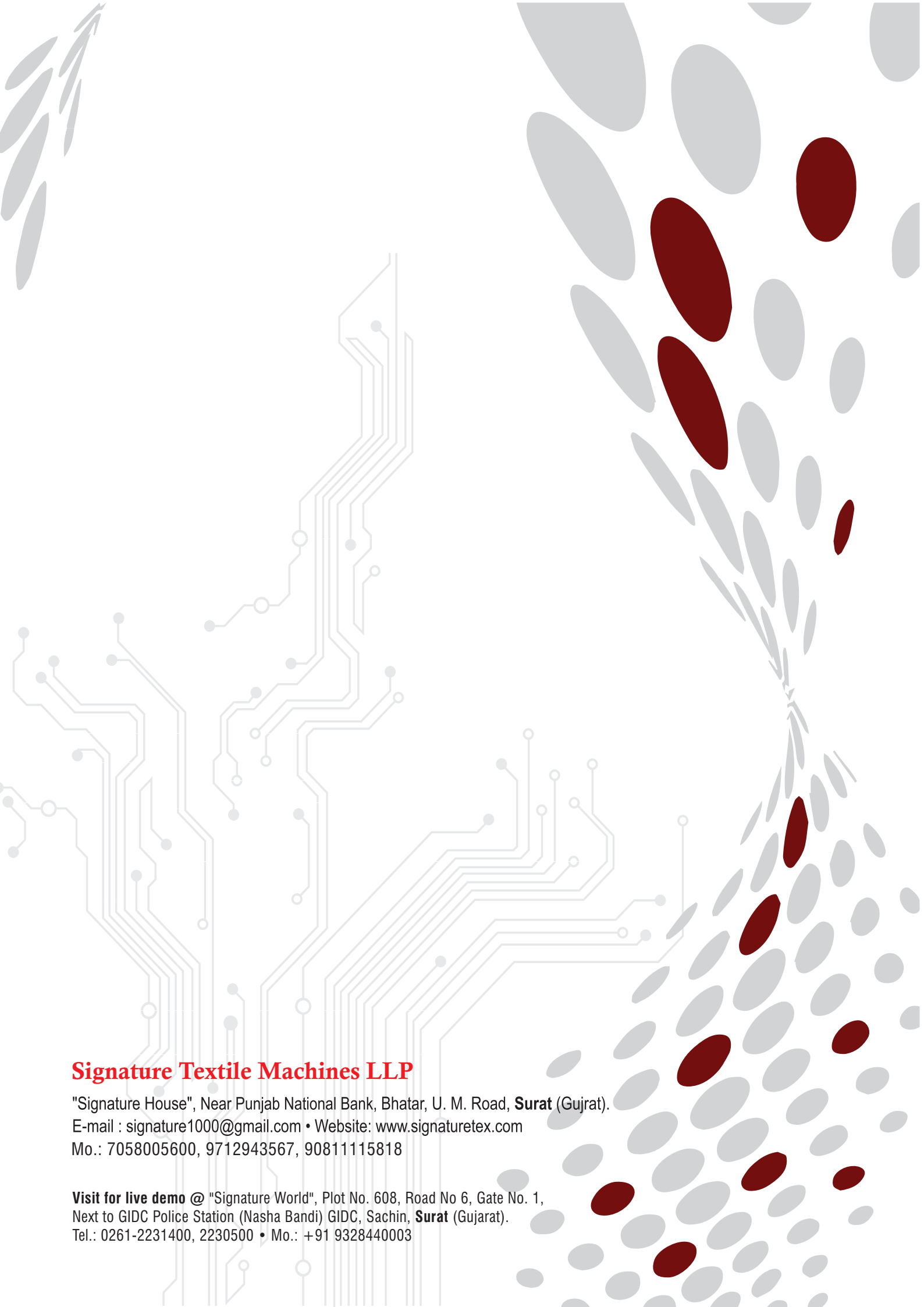
Surat now accounts for 65% of all airjet imports in India and continues to show exponential growth, rising from 48% to 84% market share within just four years. With the garment industry booming, this trend is expected to sustain for the next two decades.

2. Current Market is Underserved by Premium Brands

While Chinese manufacturers have captured Surat through aggressive pricing, there remains a significant gap in the premium segment where weavers are now demanding higher quality, durability, and service support—an area where Tsudakoma excels globally.

3. India Is Poised for Long-Term Growth in Loom Sales:

With its expanding garment industry and increasing need for woven fabric, India—especially Surat—is expected to experience at least two decades of consistent demand for airjet and waterjet looms, making it a prime market for investment and strategic sales expansion..



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