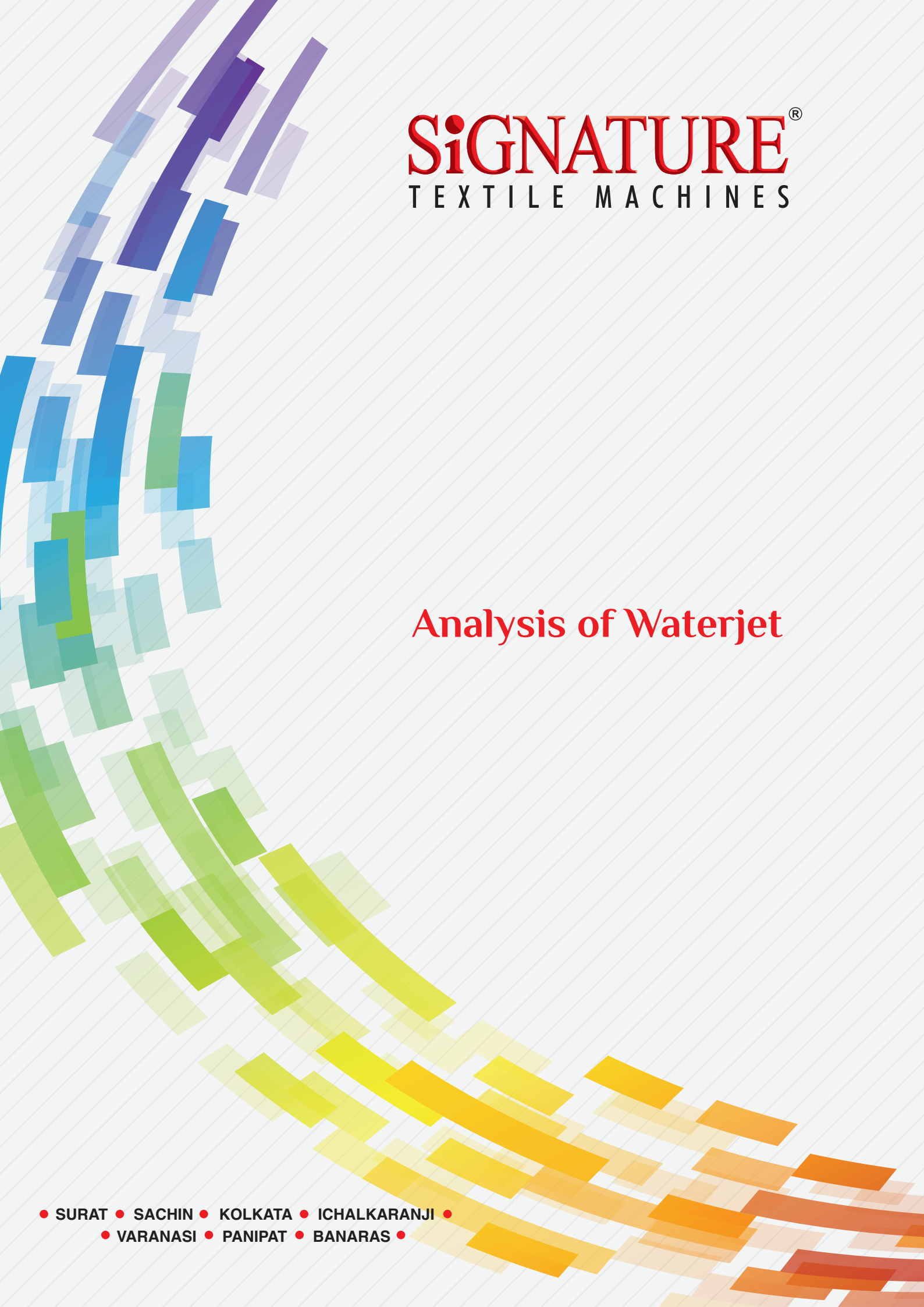




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TEXTILE MACHINES

## Analysis of Waterjet

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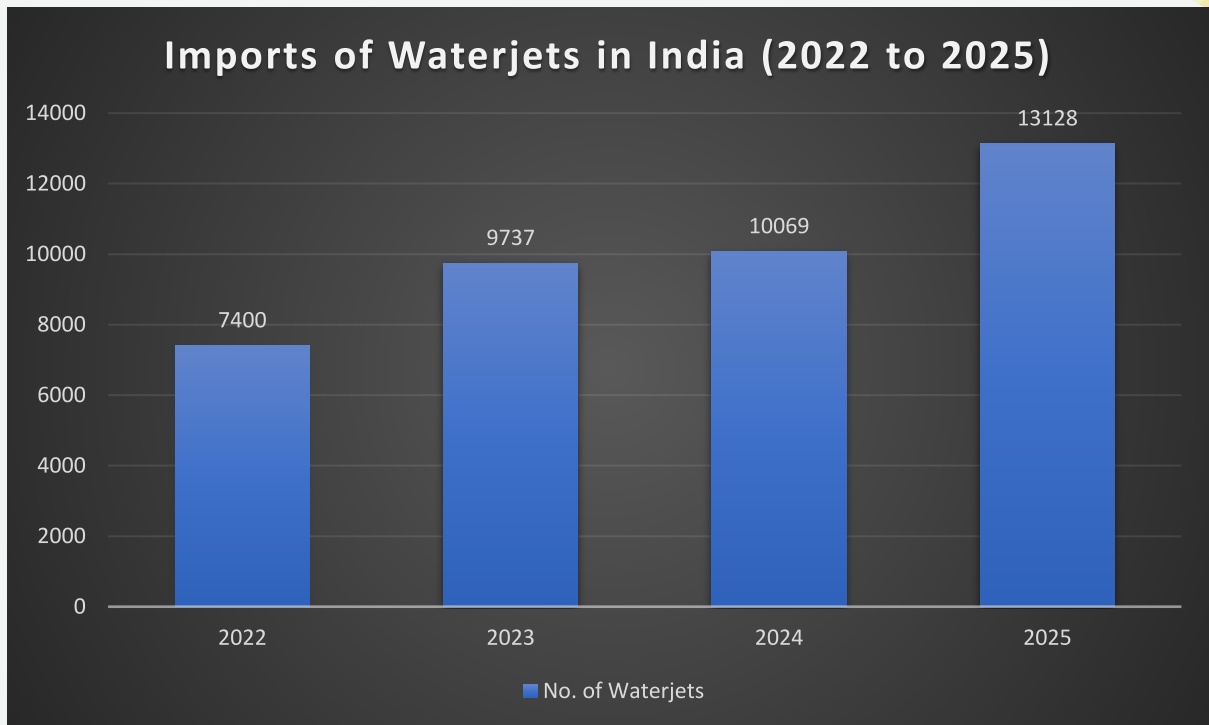
## Introduction

### India's Waterjet Demand Is Rapidly Growing

The Indian weaving industry, especially in polyester and man-made fabrics, is experiencing a sharp increase in demand for waterjet looms—making it one of the fastest-growing segments in the textile machinery market.

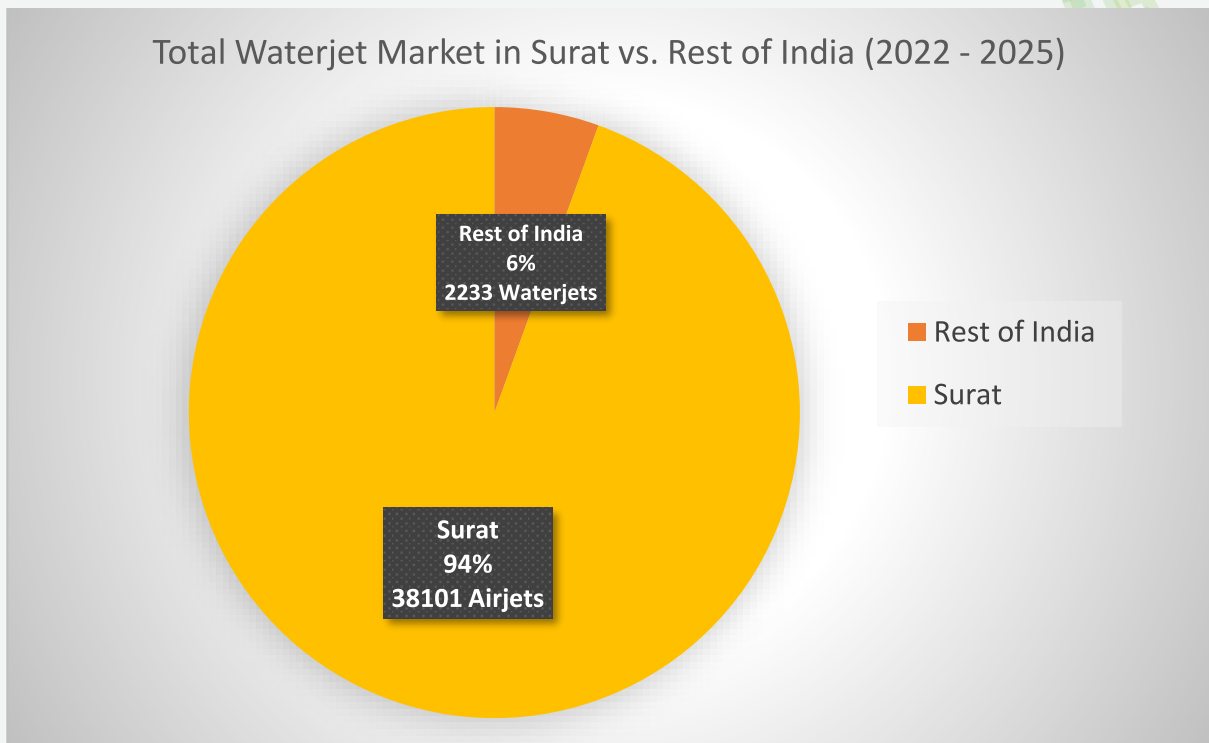
- **Surat Dominates the National Waterjet Market**  
Surat alone accounts for **94%** of India's total waterjet imports and usage, establishing itself as the undisputed hub for polyester fabric production in the country.
- **China's Decline Creates a Strategic Opportunity**  
With China facing rising labor costs and a shrinking competitive edge, global buyers are looking for alternative manufacturing bases—positioning India, and specifically Surat, as the next big player in synthetic fabric production.
- **Market Lacks Quality Alternatives to Chinese Machines**  
Currently, the Surat market is dominated almost entirely by Chinese waterjets, driven by their low cost. However, local weavers are increasingly facing issues with reliability, service, and long-term value—creating a gap in the premium segment.
- **Opportunity for Japanese Brands Through Strategic Collaboration**  
The time is ripe for reputed Japanese manufacturers to enter the Indian market by partnering with strong local players. A focused collaboration in Surat could enable Japanese brands to offer higher quality alternatives and capture substantial market share in a high-volume, underserved segment.

### Imports of Waterjets in India (2022 to 2025)



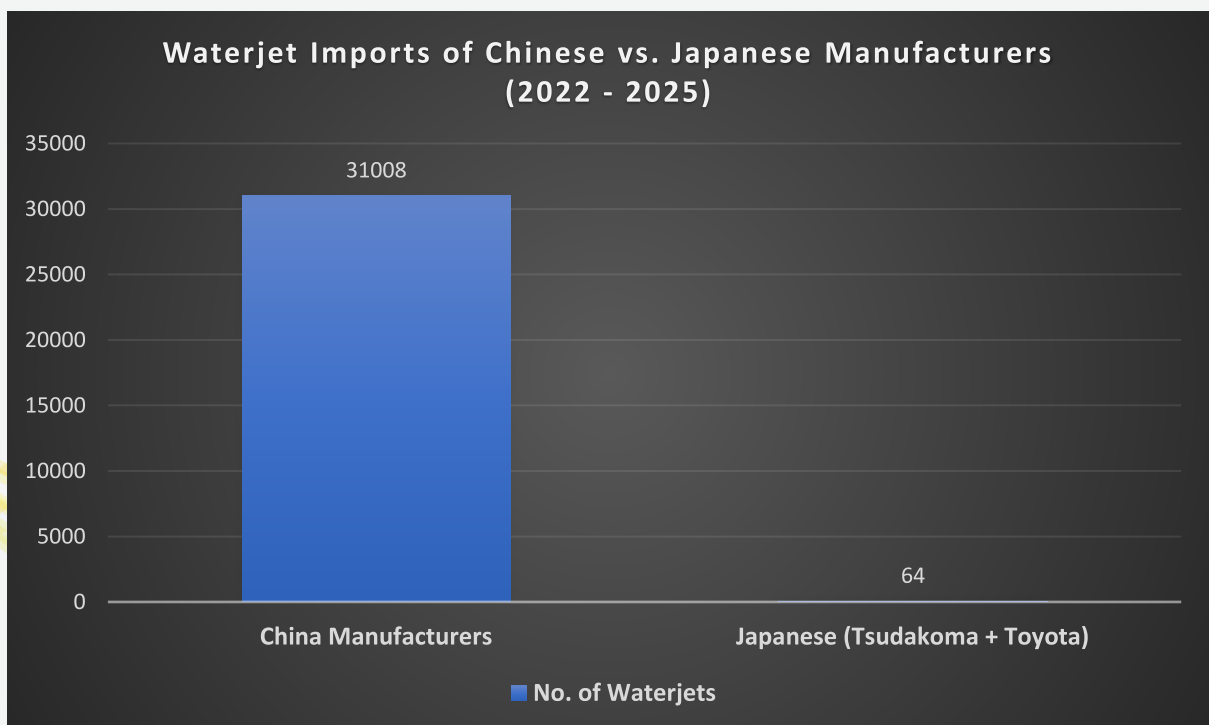
- The waterjet market in India is witnessing consistent year-on-year growth.
- Sales trends indicate a strong upward trajectory in demand across the country.
- Industry estimates suggest that annual waterjet sales may soon surpass **200,000 units**.

### Total Waterjet Market in Surat vs. Rest of India (2022 - 2025)

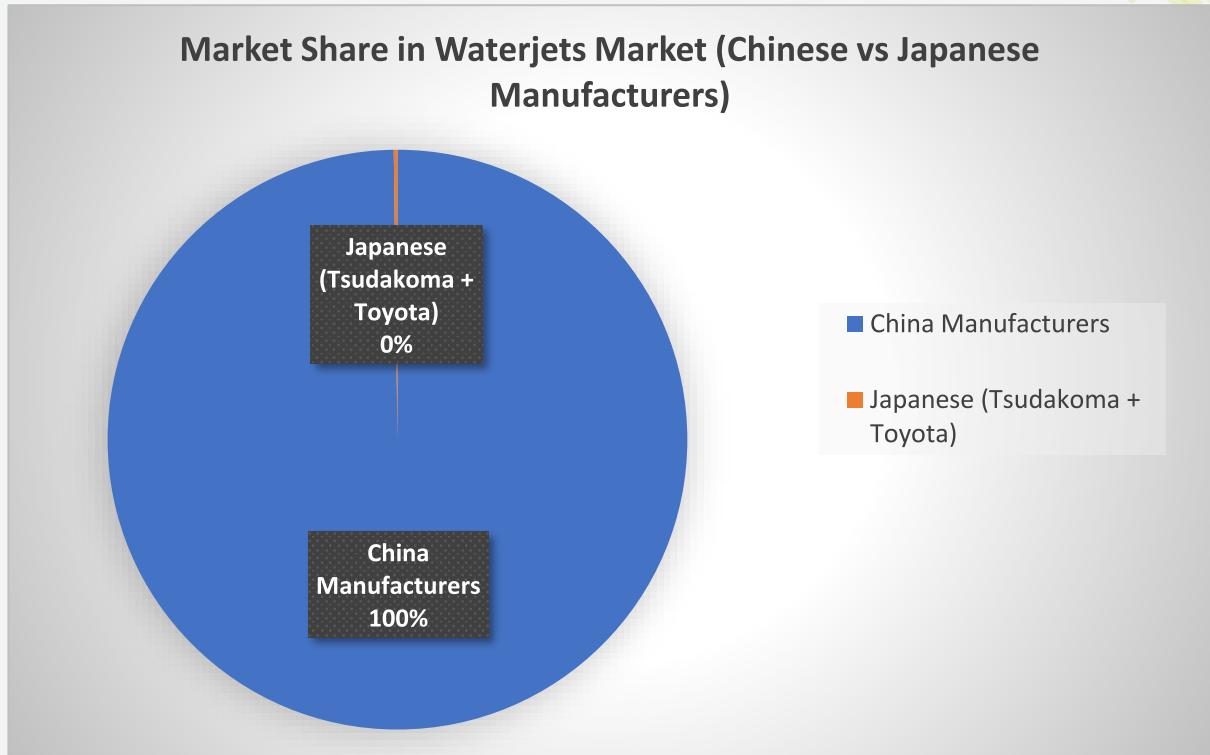


- Surat holds a dominant **94% share** of India's total waterjet market.
- This establishes Surat as the central hub for waterjet demand in the country.
- The city's overwhelming market share makes it a highly attractive destination for waterjet manufacturers and exporters.

### Waterjet Imports of Chinese vs. Japanese Manufacturers (2022 - 2025)

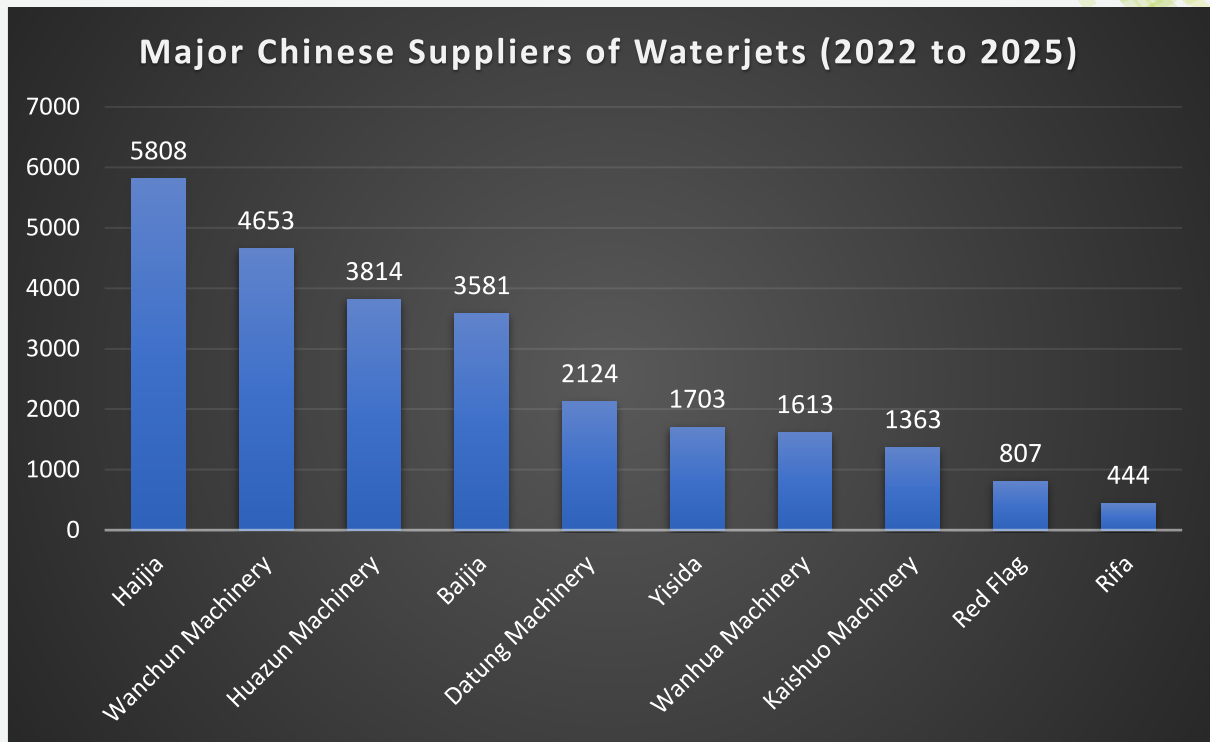


### Market Share in Waterjets Market (Chinese vs Japanese Manufacturers)



- Chinese manufacturers have a **dominant presence** in both the airjet and waterjet markets in India.
- Japanese brands like **Tsudakoma and Toyota** currently hold a minimal share in comparison.
- Key reasons for China's stronghold include:
  - **Competitive pricing** of machines
  - **Robust network of local agents** in Surat and beyond
  - **Well-established after-sales service infrastructure**, especially for airjets.

**Major Chinese Suppliers of Waterjets (2022 to 2025)**



- The graph highlights the **top 10 Chinese waterjet suppliers** operating in Surat.
- These brands have gained substantial market presence locally due to affordability and accessibility.
- However, in terms of **technology, reliability, and global reputation**, they do not compare to established giants like **Tsudakoma and Toyota**.
- This presents a clear **opportunity for premium brands** to enter and lead the market with superior quality offerings.

## Conclusion

1. **Surat's Dominance in the Waterjet Segment Is Undeniable**

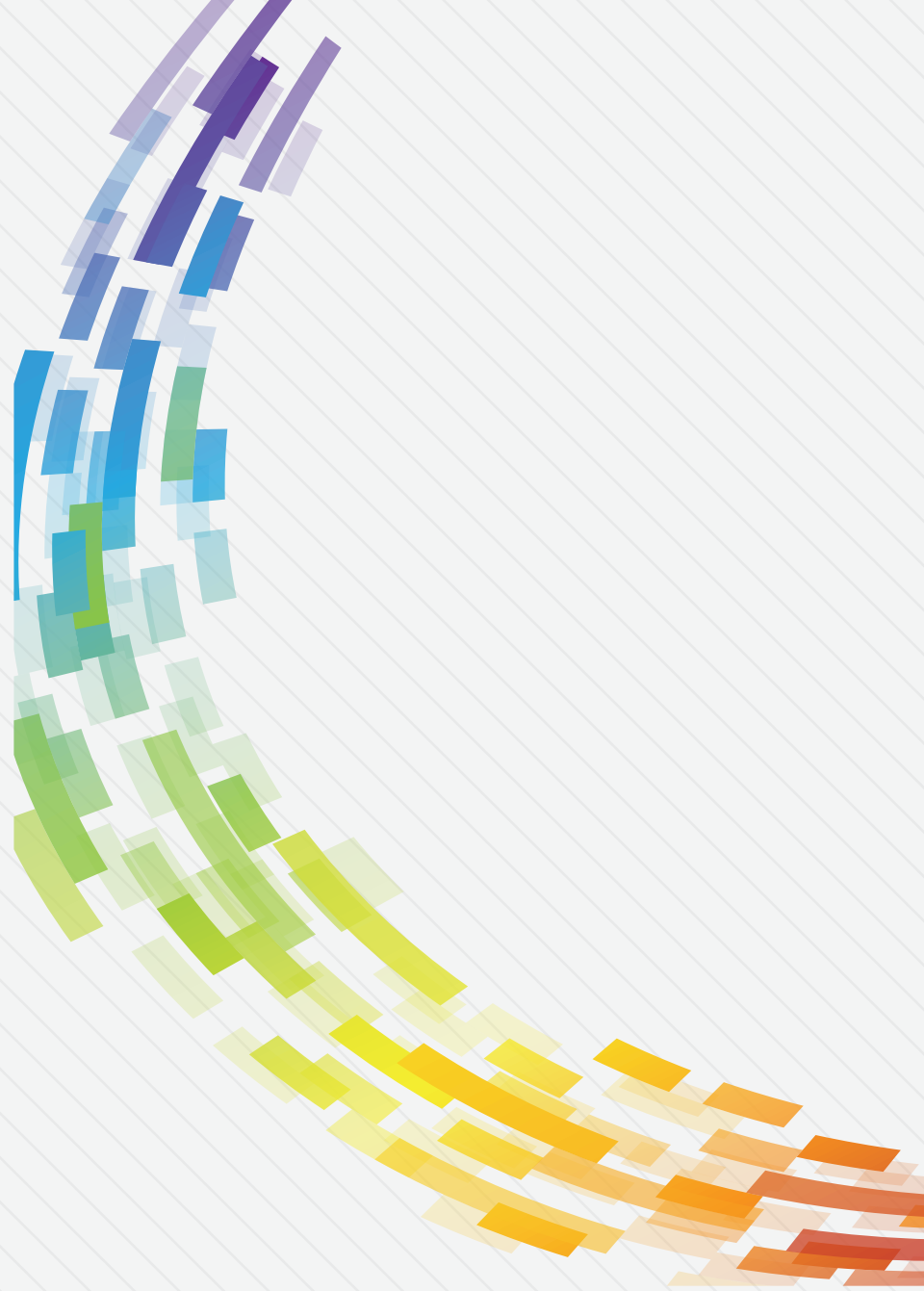
With **94% of India's waterjet imports** concentrated in Surat, the city has firmly established itself as the nerve center of polyester fabric weaving in the country, and demand is only expected to grow in the coming years.

2. **Market Conditions Signal a Readiness for Quality Alternatives**

While Chinese manufacturers currently hold a near-monopoly, local buyers are becoming increasingly aware of the limitations of low-cost machines, especially in terms of longevity, efficiency, and post-sales support.

3. **The Market Is Ripe for a Shift in Leadership**

As the industry matures and weavers seek long-term reliability over short-term savings, Surat offers a compelling landscape for high-performance brands to quietly establish their presence and gradually shape the next phase of growth in the waterjet sector.



## **Signature Textile Machines LLP**

"Signature House", Near Punjab National Bank, Bhatar, U. M. Road, **Surat** (Gujrat).

E-mail : [signature1000@gmail.com](mailto:signature1000@gmail.com) • Website: [www.signaturetex.com](http://www.signaturetex.com)

Mo.: 7058005600, 9712943567, 90811115818

**Visit for live demo @** "Signature World", Plot No. 608, Road No 6, Gate No. 1,  
Next to GIDC Police Station (Nasha Bandi) GIDC, Sachin, **Surat** (Gujarat).

Tel.: 0261-2231400, 2230500 • Mo.: +91 9328440003