

Knowledge Paper on

CURRENT SCENARIO OF INDIAN TEXTILE
MACHINERY MARKET & FUTURE
PROSPECTS



Prepared by -



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Table of Content

1. Overview of Textile & Apparel Industry	
1.1. Global Textile & Apparel Industry	3
1.2. Global Trade of Textile & Apparel Industry	7
1.3. Indian Textile & Apparel Industry	9
1.4. Indian Trade of Textile & Apparel Industry	13
2. Overview of Textile Machinery Industry	
2.1. Global Textile Machinery Industry	16
2.2. Indian Textile Machinery Industry	19
2.3. Indian Trade of Textile Machinery	24
3. Summary.....	27
4. About Suvin	30



Current Scenario of Textile Machinery

Overview of Textile & Apparel Industry

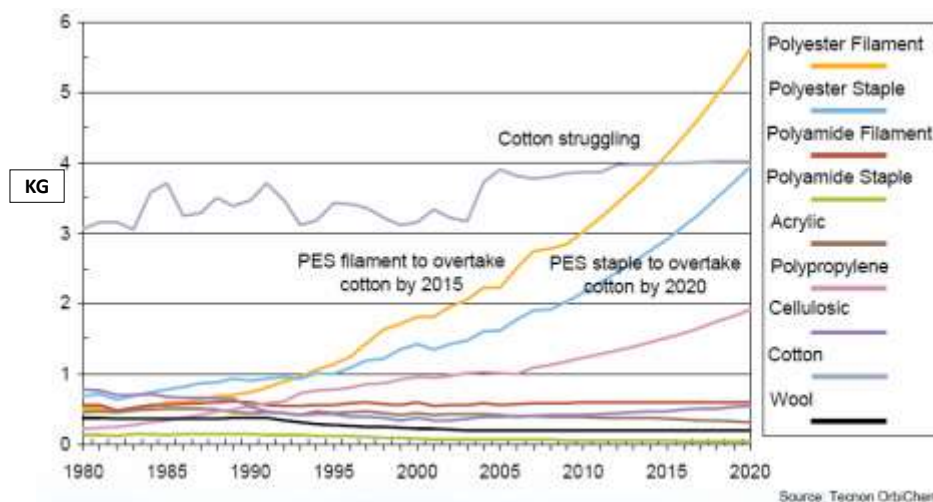
Textile and Apparel sector is a major sector globally. Since the initial stages of global industrialization, Textile and Apparel sector has remained at the forefront in generating employment and adding significantly to manufacturing output and exports for countries. Textile & Apparel industry can be attributed as the first organized industry when it grew out of the industrial revolution in the 18th Century. Countries like Britain, Italy, France, Japan, etc. had a thriving Textile & Apparel industry during their initial phase of growth, which supported their economic growth. The same is true today for nations like Bangladesh, Vietnam and Cambodia.

Since the output of Textile & Apparel industry is a basic requirement for sustenance, the long term growth trend of industry had always been positive. However, production bases have kept shifting all along. Increase in manufacturing costs in developed countries, which were the main markets also, caused growth of Textile & Apparel sector in Asian countries which had raw material advantage as well. Soon enough the manufacturing base spread to smaller nations, particularly those which got preferential access to major markets of USA, Europe and Japan.

Global Textile & Apparel Industry

Global Per Capita Fiber Consumption Trend

Per capita consumption of all man-made textile fibers are showing increasing trend in past few years. Per Capita Consumption of polyester is expected to take over Cotton by 2015 (PFY)





Current Scenario of Textile Machinery

Global Garment Market

The current global garment market is approximately US\$ 1.15 trillion which forms nearly 1.8% of the world GDP. Almost 75% of this market is concentrated in EU-27, USA, China and Japan.

Countries	Market Size in n. USD	Market Size in n. USD	CAGR
	2013	2025	%
Europe	355	440	2
USA	230	285	2
China	165	540	10
Japan	110	150	2
Brazil	60	100	5
India	46	200	12
Russia	45	105	8
Canada	30	50	4
Australia	25	45	5
RoW	80	195	8
Total	1146	2210	5

Source: World Statistics

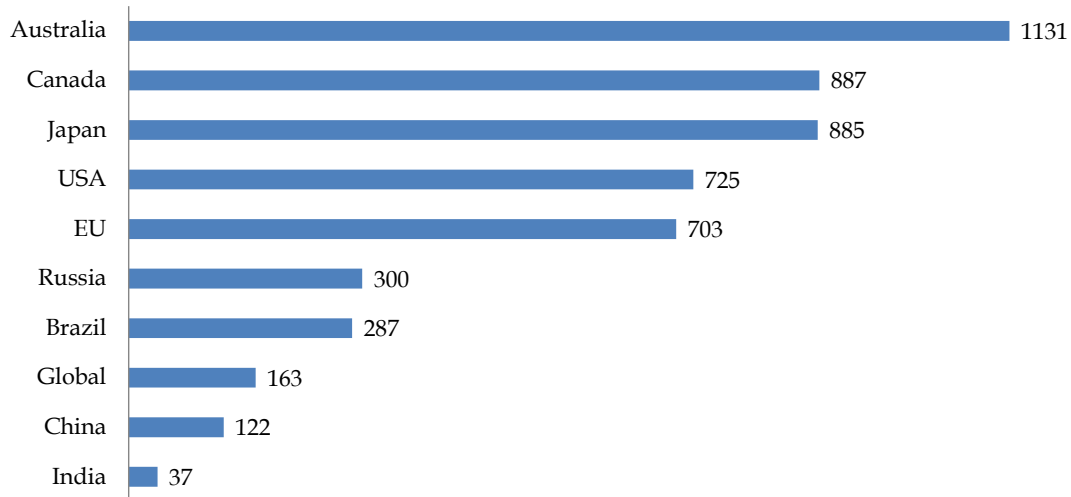
The world garment market is growing at a CAGR of 5% and attaining a size of about US\$ 2.21 trillion by 2025

An analysis of per capita spend on garment in various countries shows a significant difference between numbers in developed and developing economies. Within the major markets, India has the lowest per capita spend on garment (US\$ 37) which is only 3% of the highest one viz. Australia (US\$ 1,131).



Current Scenario of Textile Machinery

Per Capita Spend on Garment in 2013 (In US\$)



There is a positive correlation between consumer's spending on various categories and the economic stature of each country. In lesser developed economies, consumer's spending is highest on food followed by clothing, housing and other items. In developed economies, as the consumer's disposable income increases, the share of basic categories such as garment reduces, whereas the share of new categories like entertainment, recreation, consumer durables, travel, etc. increases. Though in absolute value terms, the spending on clothing will not go down in future in developed countries, but the increase will be slower than growth of disposable incomes.

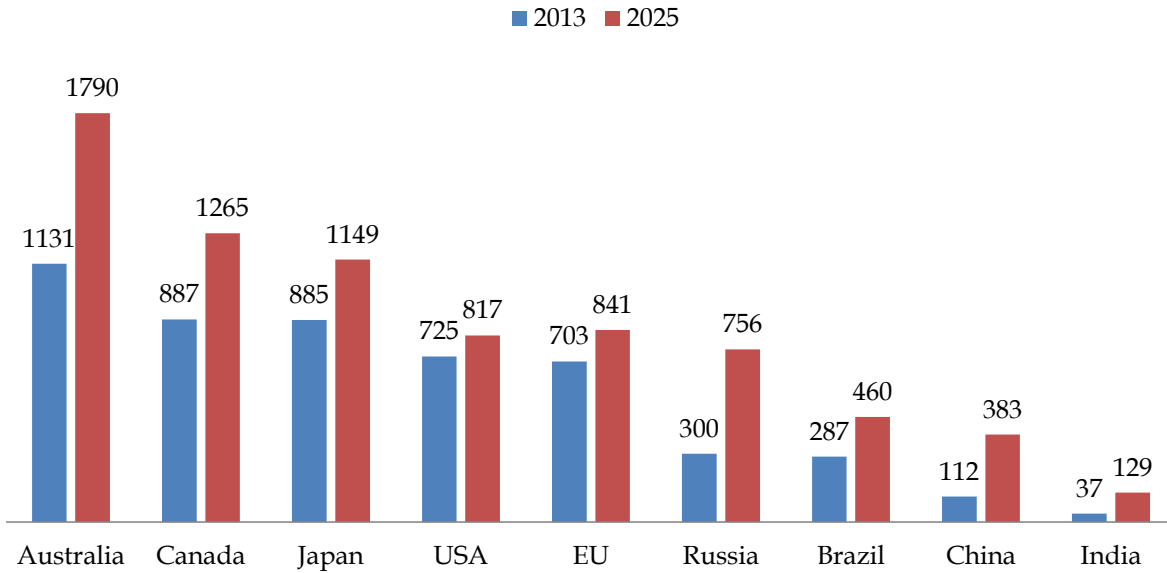
Based on this fact, it is expected that the per capita spend on garment will grow at a faster rate than the economy in Brazil, Russia, India and China; whereas it will be slower or at par with the economic growth in developed markets over next few years. When the population base of China and India is taken into account; one can see the enormous growth in consumption in both these countries

Per capita consumption of garment in developed countries like Australia, Canada and USA is much more than developing countries. But as mentioned above the per capita spend on garment in developing countries are increasing. The growth rate of per capita spend on garment is highest for India and China, which is 11%, followed by Russia i.e. 8% and Brazil i.e. 4%.



Current Scenario of Textile Machinery

Present and Projected Per Capita Spend on Garment (In US\$)



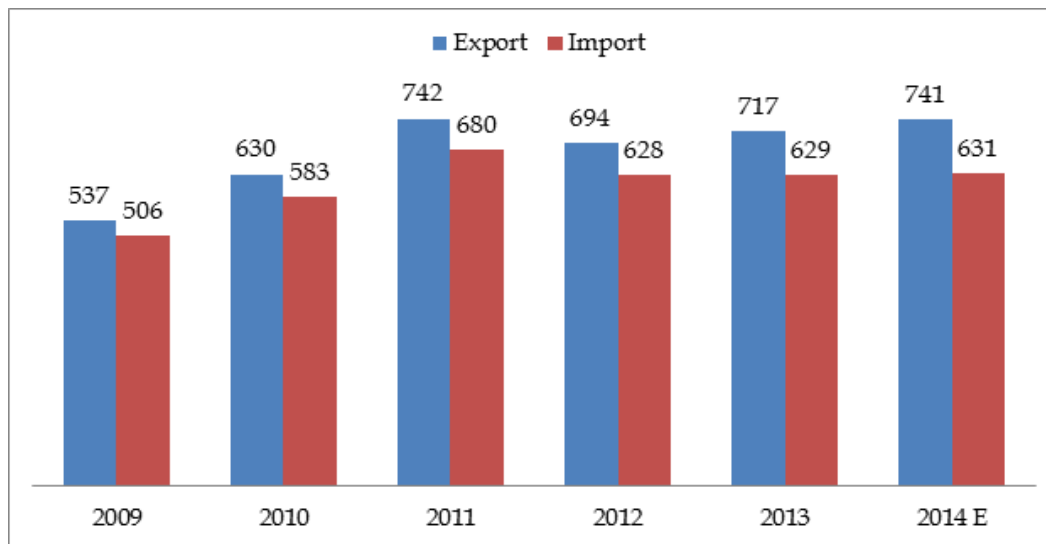
Source: Suvin Advisors Analysis



Global Trade of Textile & Apparel Industry

The global export of textile and apparel was approximately US\$ 717 billion in 2013 and import was approximately 629 Bn. US\$. From 2009 to 2013, the global textile and garment trade has grown at a CAGR of 3%.

In Bn. US\$



Source: UN Comtrade & Suvin Analysis

Major Traded Textile Category

Woven Apparel is the most traded category among the global textile & apparels trade with market share of 29%, followed by Knitted Apparels of 25%.

In Bn. USD

Textile Category	2009	2010	2011	2012	2013	2014 E
Woven Apparel	154	176	205	196	204	212
Knitted Apparel	149	164	193	175	180	185
Cotton Textile	40	56	68	64	64	65
Man-made filaments Textile	33	41	48	45	47	48
Man-made staple fibers Textile	26	34	41	37	37	38
Others	136	160	186	177	185	194
Grand Total	537	630	742	694	717	741

Source: UN Comtrade & Suvin Analysis

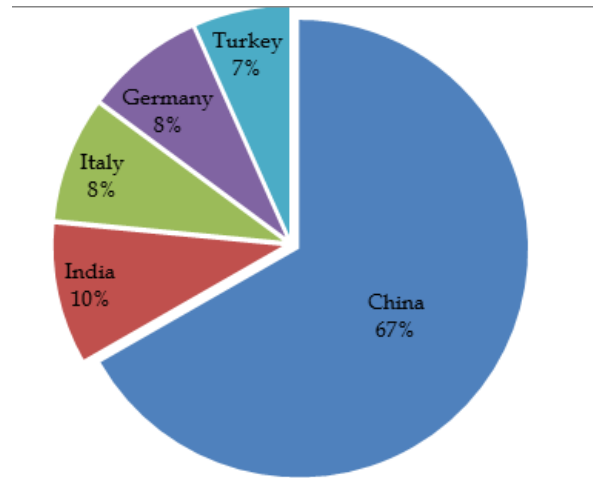


Current Scenario of Textile Machinery

Major Exporting Countries

The top 5 Textile and Apparel exporting nations are China, India, Italy, Germany and Turkey. China is the single largest exporter with 67% share while India stood at a distant second place with 10% share in 2013

Major Textile & Apparel Exporting Countries (2013)

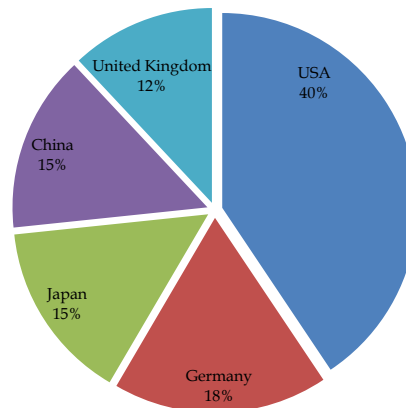


Source: UN Comtrade & Suvin Analysis

Major Importing Countries

The top 5 textiles and garment importing nations are USA, China, Germany, Japan and United Kingdom. USA is the largest importer with a share of 40% of the total global trade.

Major Textile & Apparel Exporting Countries (2013)





Indian Textile & Apparel Industry

India is the one of the world's largest producers of textiles and garments. Abundant availability of raw materials such as cotton, wool, silk and jute as well as skilled workforce have made the country a sourcing hub. It is the world's second largest producer of textiles and garments. The Indian textiles industry accounts for about 24% of the world's spindle capacity and 8% of global rotor capacity. It has the highest loom capacity (including hand looms) with 61% of the world's market share. The potential size of the Indian textiles and apparel industry is expected to reach US\$ 223 billion by 2021.

Textile also plays a major role in the Indian economy. On boosting India's manufacturing exports during 12th Five Year Plan (2012-17), envisages India's exports of Textiles and Clothing at US\$ 64.41 billion by the end of March, 2017. The textiles industry accounts for 14% of industrial production, which is 4% of GDP; employs 45 million people and accounts for 12% share of the country's total exports basket. India is major exporting country as far as textile sector is concerned and not dependent on import. Majority of import takes place for re-export or special requirement.

The year 2013-14 began with a challenging note for export of Indian T&C products in a difficult economic backdrop as the world was emerging from the shadows of a grim recessionary period as in 2012-13 and Textiles exports had witnessed a 4.20% decline in US\$ terms in 2012-13. However concerted efforts were made to reverse the trend in 2013-14. The Ministry of Textiles remained conscious of the fact that textile export is not just an end itself but means of providing gainful employment to millions of people in the country. To address these issues and reverse the trend of declining exports, a multi-pronged strategy was adopted by the Ministry of Textiles.



Current Scenario of Textile Machinery

Market Size

The Indian textiles industry is set for strong growth, buoyed by strong domestic consumption as well as export demand.

The most significant change in the Indian textiles industry has been the advent of man-made Fibres (MMF). India has successfully placed its innovative range of MMF textiles in almost all the countries across the globe.

Installed Capacities & Production

India has the second largest textile manufacturing infrastructure in world after China. India is one of the few countries in world which has production at each level of textile manufacturing viz. fibre manufacturing, spinning, weaving, knitting, processing and garmenting. The snapshot of installed capacities of textile infrastructure in India is provided below:

Installed Capacities in Indian Textile Sector

Description	Capacities
Spindles	44.73 Mn.
Rotors	7.95 Lakhs
Looms	52,000 No.
Power Loom	23.67 Lakhs
Man-made Fibers	1781.6 Mn. Kgs
Man-Made Filament	2248.03 Mn. Kgs

Source: Office of Textile Commissioner

Staple Fibre Production

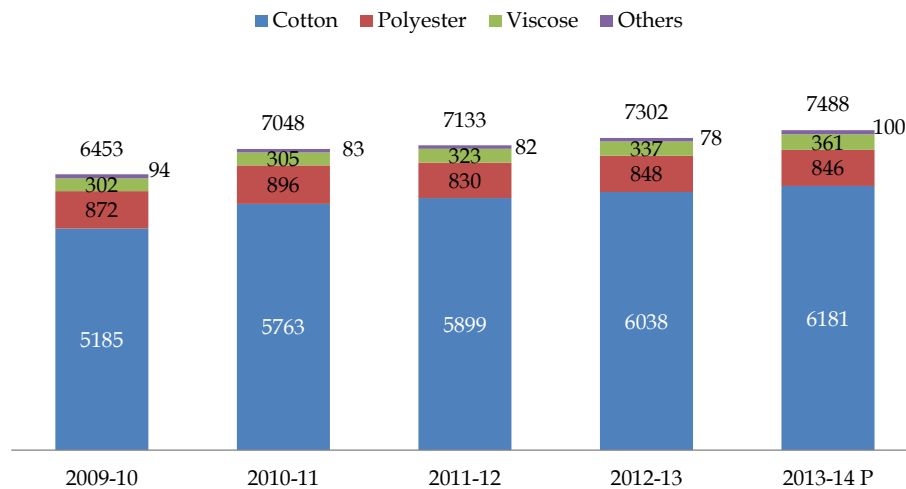
The total staple fibre production in India has increased from 7133 mn. kg in 2011-12 to 7,488 mn. kg. in 2013-14, growing at a CAGR of 2%. Cotton is the major fibre produced in India accounting for approx. 83% of the total fibre production.



Current Scenario of Textile Machinery

Fiber production in India

In Mn. Kg

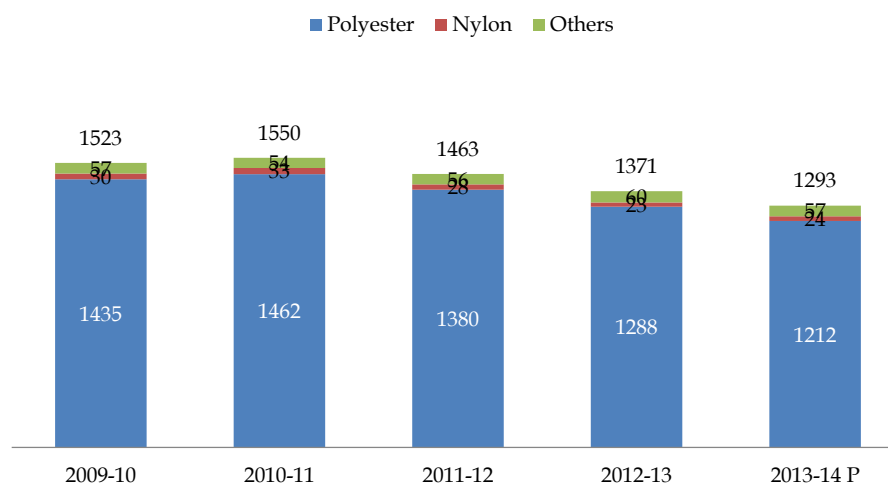


Source: Textile Statistics & Official Indian Textile Statistics 2012-13, Office of Textile Commissioner

Manmade Filament Yarn Production

Filament yarn production in India has shown de-growth of 4% per annum from 1,523 mn. kg in 2009- 10 to 1,293 mn. kg in 2013-14. Polyester has the majority share of approx. 94% in filament yarn production while others include viscose; nylon and polypropylene have a combined share of 6%.

Filament Yarn Production in India (In Mn. Kg)



Source: Textile Statistics & Official Indian Textile Statistics 2012-13, Office of Textile Commissioner

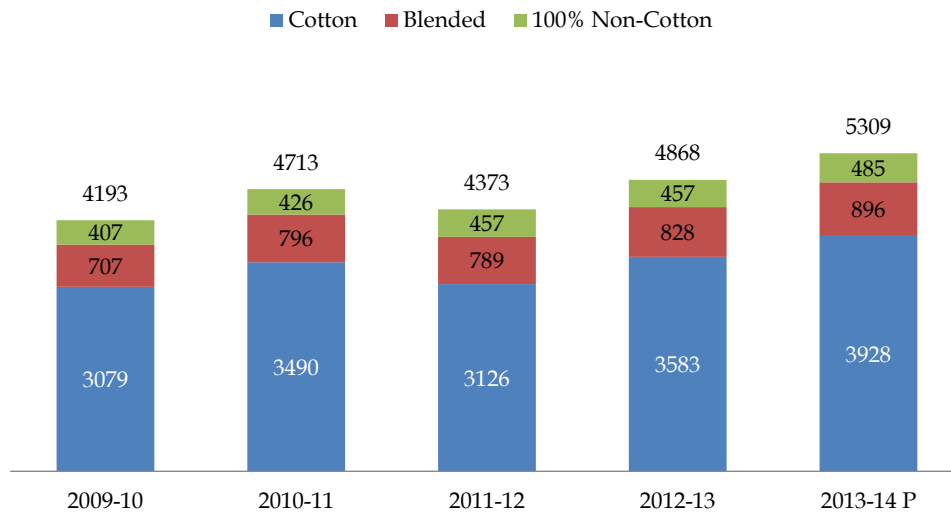


Current Scenario of Textile Machinery

Spun Yarn Production

The production of spun yarn in India has grown at a CAGR of 6% from 4,193 mn. kg. in 2009-10 to 5,309 mn. kg. in the year 2013-14. Approximately 74% of the total spun yarn produced in India is 100% cotton yarn.

Spun Yarn Production in India (In Million Kg)

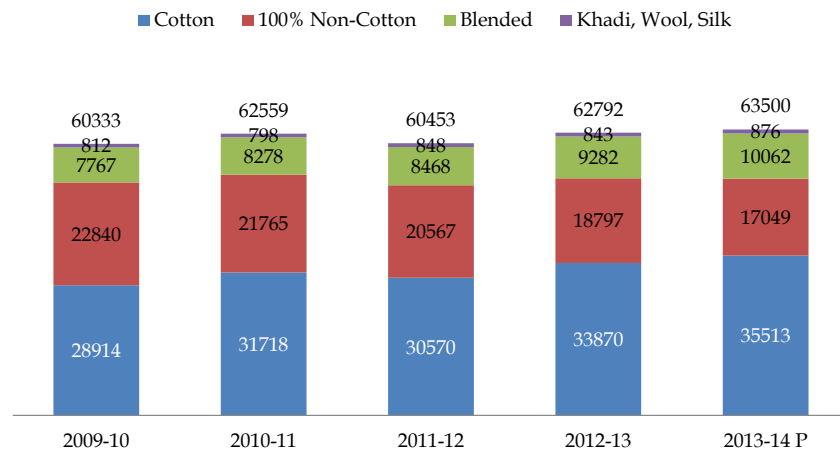


Source: Textile Statistics & Office of Textile Commissioner

Fabric Production

The production of fabric in India is almost stagnant from 2009-10 to 2013-14, with a CAGR of 1%. Cotton fabric and blended fabric has grown at 5% and 7% per annum, while 100% non-cotton fabric has shown de-growth of 7% in the same period.

Fabric Production in India (In Million Sq. Meters)



Source: Textile Statistics & Office of Textile Commissioner

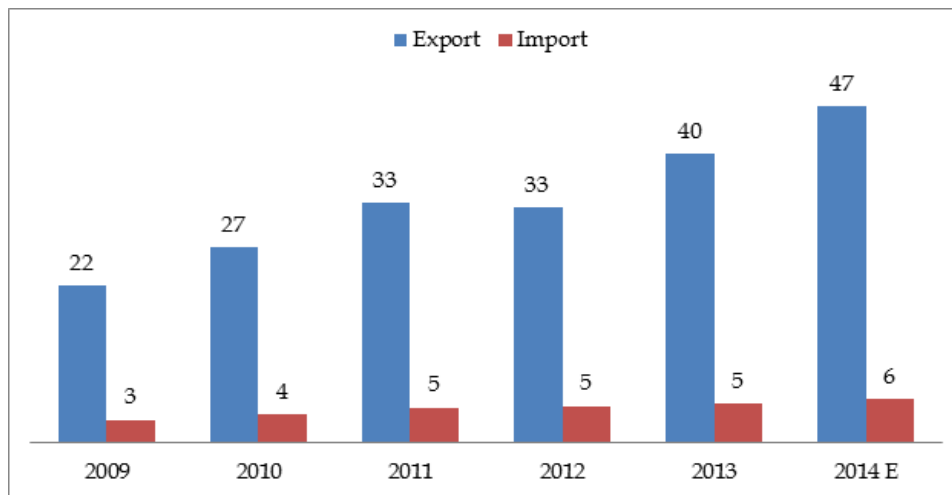


Current Scenario of Textile Machinery

Indian Trade of Textile & Apparel Industry

In 2013, India became second largest exporter of textile & garment in the world surpassing Italy and Germany. India exported textile and garment goods worth US\$ 40 billion, with a share of approx. 10% of global textile and garment trade. The Indian exports are increasing at a CAGR of 16% since 2009.

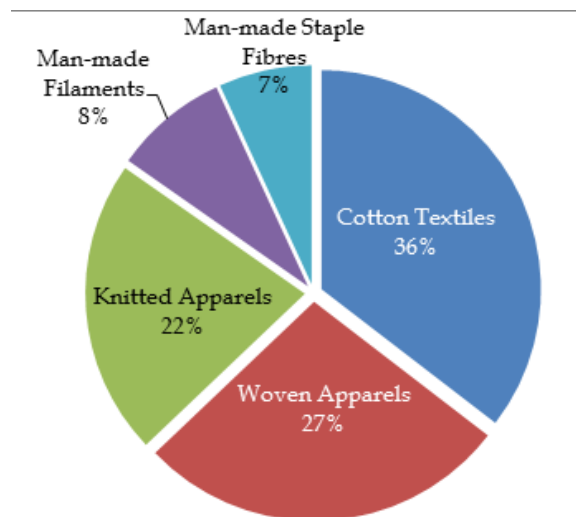
In Bn. US\$



Source: DGCI&S & Suvin Analysis

Major Traded Category of Textile & Apparel Trade

Cotton textiles is most traded category among the textile & apparel trade of India





Current Scenario of Textile Machinery

Source: DGCI&S, Suvin Analysis

USA, China, UAE, UK and Bangladesh are major export partner of India. India's leading textile and garment export partner is USA with a share of 18% followed by China. In last few years, China has started importing significant volumes of fibre and yarn from India. Bangladesh is also one of the destinations where Indian textile exports have grown in last few years.

Export Partners of India for Textile & Apparel Trade (2013)

Export Partner	Trade Value in Bn. USD
USA	7.23
China	5.09
United Arab Emirates	2.77
United Kingdom	2.39
Bangladesh	2.00
RoW	20.71
Grand Total	40.19

Source: DGCI&S, Suvin Analysis

Government Initiatives

The Indian government has come up with a number of export promotion policies for the textiles sector. It has also allowed 100% FDI in the Indian textiles sector under the automatic route.

Some of initiatives taken by the government to further promote the industry are as under:

- The Ministry of Textiles plans to ink a deal with Flipkart to provide an online platform to handloom weavers to sell their products.
- The government has taken a number of initiatives for the welfare and development of the weavers and the handloom sector
- The Cabinet Committee on Economic Affairs (CCEA) has approved an Integrated Processing Development Scheme (IPDS) to make textiles processing units more environment-friendly and globally competitive.



Current Scenario of Textile Machinery

- The Ministry significantly stepped up external economic engagement with the other information and negotiated a number of bilateral agreements to gain significant market access. Various procedural bottlenecks in exports were also addressed while supporting the textiles exports sector through various provisions of the Foreign Trade Policy and the other policy initiatives to enable the sector to increase market share in the global textiles markets. As a result of focused efforts made by the Ministry of Textiles, not only the declining trend of textile exports was arrested but a significant growth in export was witnessed during 2013-14.

The Government of India is encouraging investments through increasing focus on schemes such as Technology Upgradation Fund Scheme (TUFS) and cluster development activities. The Ministry of Textiles has commenced an initiative to establish institutes under the public-private partnership (PPP) model to encourage private sector participation in the development of the industry.



Textile Machinery Industry

Machinery Production Status

World production of textile machinery annually is over US \$ 20 Billion. The major manufacturers of textile machinery are Italy, Germany, Switzerland, France and now China. With the growing demand in the export market of textile products, India can avail of this opportunity by upgrading its textile industry especially in the area of modernization of its weaving and processing sectors. China is leading in the field of textile exports today because they installed a large set-up of spindles, rotor and shuttle less weaving machines. Today, China is manufacturing the entire range of machineries for the textile industry, not only spinning weaving and processing but also knitting, embroidery and plants for the non-woven industry.

Global Textile Machinery Shipments in 2013

Overall shipments of new textile machinery were slightly down in 2013, though remaining at a relatively high level. Compared to 2012, the global shipments of new short-staple spindles rose by 10% while those of open-end rotors decreased slightly by 2% and of long-staple spindles dropped by 45%. Also, the number of new draw-texturing spindles shipped was down by 29%, those of new shuttle-less looms by 4% and those of new electronic flat-knitting machines by 24%.

Spinning Machinery

After shipments of new short-staple spindles plummeted by 33% in 2008 and by 17% in 2009, they soared in 2010 by 75% to pre-crisis levels and increased in 2011 by a further 15%, reaching 14.33 million, an all-time high. In 2012 shipments of short-staple spindles fell by 27% to 10.51 million spindles, but rose again in 2013 by 10% to 11.56 million. Almost 93% of all shipped short-staple spindles in 2013 were destined for Asia (10.72 million), with China alone absorbing 6.21 million or 54% of global shipments, followed by India, a distant second (2.19 million spindles or 19%), Indonesia (757,000 or 6.6%), Turkey (566,000 or 4.9%) and Pakistan (546,000 or 4.7%).

Global shipments of long-staple (wool) spindles dropped in 2013 by 45% from 146,400 to 80,800. Europe was the main recipient (49,900 or 62%), followed by Asia (28,950 or 36%) and the Americas (1,900 or 2.4%). The single biggest investor in long-staple (wool)



Current Scenario of Textile Machinery

spindles was Turkey with 34,300 spindles (or 43%), followed by China with 26,550 spindles (or 33%), Romania with 6,050 (8%), Italy with 5,000 spindles (6%) and Poland with 2,900 (4%).

As far as open-end rotors are concerned, global investments decreased slightly in 2013 by two per cent to 443,200. Asia was once again the region that absorbed by far most of the new rotors (351,400 or 79% of global shipments). Country-wise, China was the dominant investor putting in place 271,740 or 61% of global shipments. India was again a distant second with a total of 30,980 new open-end rotors (7%), followed by Turkey with 28,640 rotors (6.5%), Brazil with 13,780 rotors (3.1%), Vietnam with 13,660 rotors (3.1%) and Malaysia with 12,040 rotors (2.7%).

Texturing Machinery

From 2010 to 2011 global shipments plummeted from 13,200 to just 1,824 (86%). In 2012 no shipments of single header draw-texturing spindles (mainly used for polyamide filaments) were recorded. In 2013 shipments reached 2,600 spindles, of which 2,120 went to Asia (China 960, Chinese Taipei 840 and Thailand 320) and 480 to Europe and others (Turkey).

In the segment of double header draw-texturing spindles mainly used for polyester filaments, investments dropped from 717,760 to 505,080, a decline of 29%. Almost 90% (or 455,640) of all shipments went to Asia. By far the biggest single investor in this type of draw-texturing machinery was again China where 366,480 new spindles or 73% of global shipments were installed, followed by the distant second Japan with 30,860 or 6.1%, India with 21,640 or 4.3%, Vietnam with 8,160 or 1.6%, and Egypt with 7,920 or 1.6%.

Weaving machinery

Worldwide shipments of shuttle-less looms fell slightly in 2013 from 86,450 machines to 83,420, a fall of 4%. The main reason for this development was a further decline in shipments of water-jet looms. After a skyrocketing jump of 537% to 73,250 in 2010 and to 112,930 in 2011, which was partially due to the fact that more weaving machinery manufacturers reported for the first time in 2010, global deliveries of water-jet shuttle-less looms dropped by 65% to 39,920 machines in 2012 and by 13% to 34,580 in 2013.



Current Scenario of Textile Machinery

In the shuttle-less loom segment of rapier/projectile looms shipments increased by 2.5% from 23,250 in 2012 to 23,830 in 2013. Also deliveries of shuttle-less air-jet looms moved up from 23,300 in 2012 to 25,010 (7%).

As in previous years, the main destination of shuttle-less looms was Asia where 76,390 or 92% were installed. Country-wise, the biggest global investor was again China with 54,830 looms (66%), of which 30,590 were water-jet looms, 16,330 air-jet looms and 7,910 rapier/projectile looms. With 10,060 shuttle-less looms (12%) of global shipments India was the second biggest investor, followed by Indonesia (3,110 or 3.7%), Turkey (3,010 or 3.6%), Bangladesh (2,820 or 3.4%) and Korea (1,290 or 1.5%).

Global shipments of large circular knitting machines increased by 27% from 28,900 in 2011 to 36,640 in 2012, was a new record. In 2013 the number of machines remained practically unchanged at 36,575. Asia was the main regional investor in this type of machinery absorbing 33,440 units or 91% of all new machines shipped in 2013. The biggest single investor was once again China with a total of 27,460 (a global market share of 75%), followed by India with 1,600 (or 4.4%), Turkey with 1,490 (or 4.1%), Bangladesh with 910 (or 2.5%), and Indonesia with 850 (or 2.3%).

In the electronic flat knitting machines segment, the global shipments in 2012 dropped by 34% to 46,100 machines. Also in 2013 global shipments recorded a decline of 24% to 35,180. The bulk of global shipments of electronic flat knitting machines was delivered to Asia (30,300 or 86%), while Europe's share (including Turkey) reached 12% (4,350 machines). The biggest single investor in 2013 was China with 20,800 new machines (59%), followed by Bangladesh with 3,960 (11.3%), Turkey with 2,790 (7.9%), Hong Kong with 1,850 (5.3%) and Italy with 790 (2.3%).



Indian Textile Machinery Industry

The textile machinery manufacturing section is one of the largest segments of the machinery manufacturing industry in India. This industry is nearly sixty years old and has about 1000 machinery and component manufacturing units. Nearly 300 units produce complete machinery and the remaining produces various textile machinery components. The total investment in this industry is around 2000 Crores. However, not all the units work to full capacity or even the optimum capacity level. Except for the units in the spinning sector where the machineries are of international standards; in the other sectors, machinery manufacturing for weaving, knitting and wet-processing lack standard of quality and performance (in most of the cases) to compete with the European manufacturers. In the weaving sector, shuttleless weaving machinery (rapier or jet) and in the knitting sector (circular knitting and flat knitting) machineries hardly have any presence in the industry.

Textile Machinery Industry

The machinery manufacturing operation takes place both in the organised and the unorganised sectors. In the organised sector, in addition to the public limited companies, machinery manufacturing is done in independent units, which have collaborative joint ventures with the foreign entities. In the decentralized sector, there are small-scale industrial units as well as tiny units engaged in the production of accessories pertaining to the textile machinery.

Textile Engineering Goods Industry classified as follows:

- Ginning & pressing machines
- Spinning & allied machines
- Synthetic filament yarn machines
- Weaving and allied machines
- Processing machines
- Hosiery/RMG machines
- Textile testing equipment
- Multiple segments (combination of the above)
- Accessories and parts
- Others



Current Scenario of Textile Machinery

Major Textile Machinery Hubs in India

Majority of the production comes from the States of Tamil Nadu and Gujarat; collectively contributing around 84 per cent of the production.

Around 87 per cent of the total production, i.e., textile machinery is coming from the six clusters namely Ahmedabad, Bangalore, Coimbatore, Ludhiana, Mumbai and Surat.

These clusters are strategically located to serve the textile industry and have the affiliation to produce the kind of machinery required by the industry. Ahmedabad is a cluster of weaving.





Current Scenario of Textile Machinery

Major Textile Players

There are many small & medium enterprises involve in the production of textile machinery & its parts, but there are few players who have been holding their position in field of textile machine manufacturing and they are as follow:



Laxmi Machine Works

RIETER

Rieter India



Dhall Group



Kirloskar Toyota Textile Machinery Pvt. Ltd.



Prashant Group



Yamuna Machine works (P) Ltd.



Harish Textile Engineers (P) Ltd.



Shree Bhagwati Textile Industries

Growth Drivers in India for Machinery Market

Purchase of new machinery is the key growth driver of the market. One of the major growth drivers for global machinery market is the strong economic recovery; post-recession, increasing demand for textile products, and environmentally friendly fibers, and a growing demand for the developing nations. Today machinery manufacturers produce textile machineries at competitive prices, and sophisticated machines of higher speed, and production capacity. Presence of numerous small scale players also makes the machinery sector more competitive. Along with them, MNCs have also entered the global arena, taking the competition to the next level, driving companies to work on their productivity and innovation.

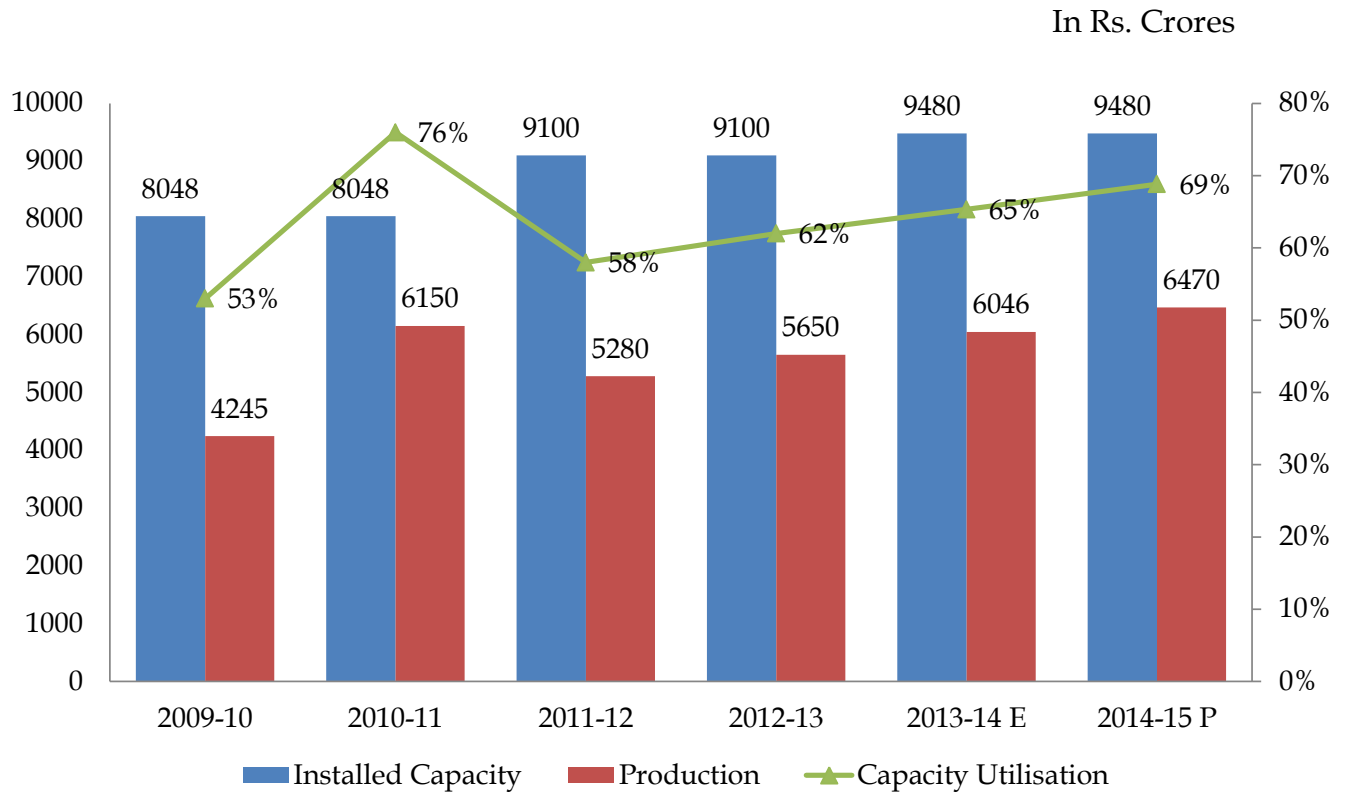
The global demand of textile machinery is rising due to growing demand of textile industry. Today, Textile machinery sourcing is majorly done from European countries, which is relatively costly. India is strategically located from most of major textile & apparel producing countries and India has good potential to explore global opportunities & tap global market. India has to first focus on exports to the neighboring countries which are emerging as significant textile producers.



Current Scenario of Textile Machinery

Capacity Utilisation of the Textile Machinery Manufacturing Industry

Most of the textile machinery manufacturing units are under utilisation. Not all the textile machinery manufacturing units in India work to full capacity or even the optimum capacity level



Source: Textile Commissioners Office

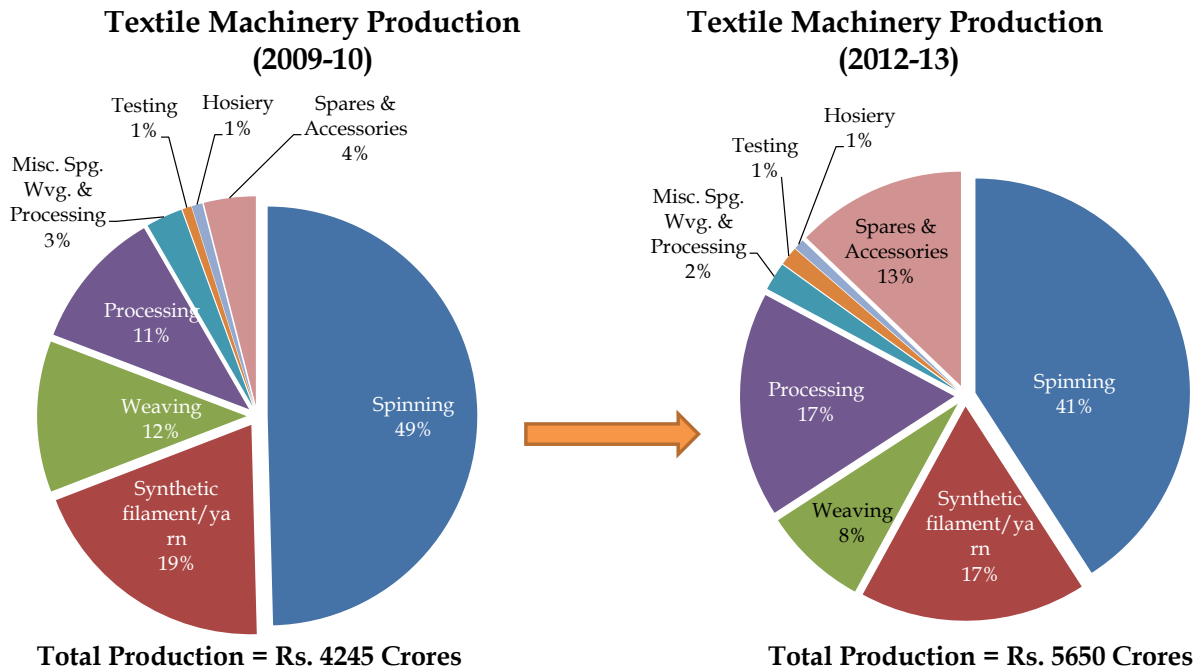
Production of Textile Machinery

In 2012-13, the production of processing machinery and production of spares & accessories required for textile machineries has been increased as compare to 2009-10. The production of processing machinery has increased by 6%, whereas the production of spare parts & accessories has increased by almost 9%, capturing the share of spinning, weaving & synthetic filament/ yarn machinery.



Current Scenario of Textile Machinery

Production of Textile Machinery in 2009-10 vs 2012-13



Source: Office of Textile Commissioners

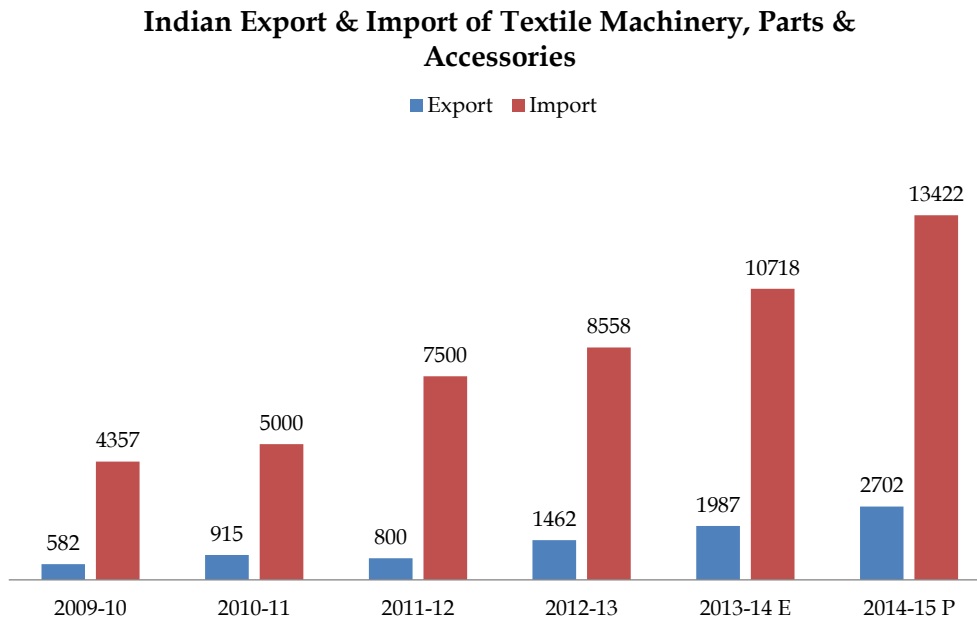


Current Scenario of Textile Machinery

Indian Trade of Textile Machinery

Indian Exports and Imports of Textile Machinery, Parts and Accessories

In Rs. Crores



Source:

Office of Textile Commissioners

Indian imports for textile machinery parts and accessories are growing at a CAGR of 25% in last few years, whereas exports are very low as compare to imports, but it is also showing increasing trend and it is increasing at a CAGR of 36%.

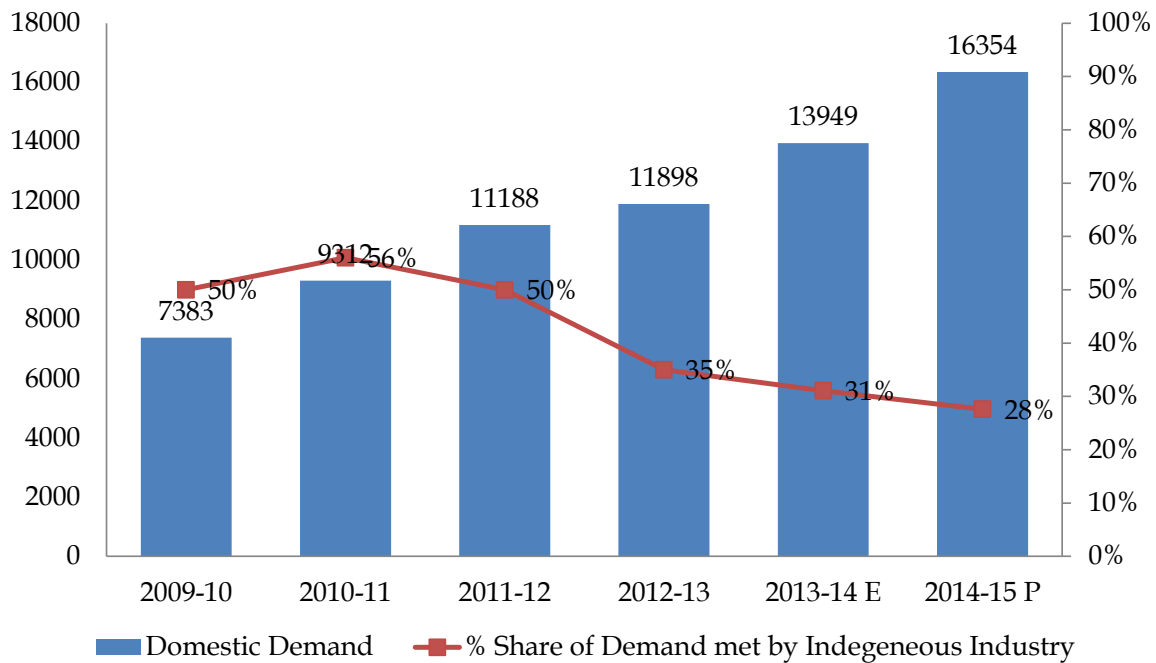
Domestic Consumption of Textile Machinery & Parts

Domestic demand for textile machinery is increasing at a CAGR of 17% over the year. The demand is increasing; but demand met by indigenous manufacturer is not even half of the total demand.

In Rs. Cores



Current Scenario of Textile Machinery



Source: Office of Textile Commissioners

The major problem in the textile machinery manufacturing industry is the lack of investment in Research and Development, except for the manufacturing units who have technical collaboration with reputed foreign companies; no progress has been made in the quality of the machinery produced. This dependence on borrowed technology and want of research has kept most of the sectors except spinning machinery sector far behind in the standard and performance of the machinery produced. This has resulted in the import of second hand machinery especially in the area of weaving thus discouraging the advancement of technology in the manufacturing of similar machinery in India. Lack of systematic fiscal support to the industry by the Government has also added to the problems.

The machinery manufacturing operation takes place both in the organised and the unorganised sectors. In the organised sector, in addition to the public limited companies, machinery manufacturing is done in independent units, which have collaborative joint ventures with the foreign entities. In the decentralized sector, there are small-scale industrial units as well as tiny units engaged in the production of accessories pertaining to the textile machinery.



Current Scenario of Textile Machinery

In brief, the Indian textile engineering sector seems to offer the modern technically advanced machinery for spinning, weaving and processing sector as well as simple machinery required in ginning and pressing industry of the sector. Still the performance of the Indian textile machinery industry is far from satisfactory. Competition from high tech machinery of European and South-East Asian countries is a real challenge to the very existence of this industry.



Summary

- Textile and Apparel sector is a major sector and has major contribution in generating employment and adding significantly to manufacturing output and exports for countries
- The present global garment market is approximately US\$ 1146 Bn and expected to reach Bn. 2210 US\$ by 2025 at a CAGR of 5%
- Per capita spend on garment will grow at a faster rate in developing countries like Brazil, Russia, India and China due to increase in disposable income
- In India, per capita spend on garment is increasing at a CAGR of 11%
- The global Textile & Apparel export trade was approx. 717 Bn. US\$ in 2013 and it is expected to reach 741 Bn. USD by end of 2014. The exports have increased at a CAGR of 3% in last few years
- Apparel is the most traded category among the global textile & apparel trade, capturing the market share of 54%, followed by Cotton and man-made textile.
- In 2013, China is the single largest exporter of textile & apparel category with 67% share while India stood at a distant second place with 10% share
- Whereas USA is the largest importer with a share of 40% of the total global trade, followed by Germany, Japan & China
- Textile and Apparel sector is a major sector and has major contribution in generating employment and adding significantly to manufacturing output and exports for countries
- The present global garment market is approximately US\$ 1146 Bn and expected to reach Bn. 2210 US\$ by 2025 at a CAGR of 5%
- Per capita spend on garment will grow at a faster rate in developing countries like Brazil, Russia, India and China due to increase in disposable income
- In India, per capita spend on garment is increasing at a CAGR of 11%



Current Scenario of Textile Machinery

- The global Textile & Apparel export trade was approx. 717 Bn. US\$ in 2013 and it is expected to reach 741 Bn. USD by end of 2014. The exports have increased at a CAGR of 3% in last few years
- Apparel is the most traded category among the global textile & apparel trade, capturing the market share of 54%, followed by Cotton and man-made textile.
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About Suvin Advisors Pvt. Ltd.

Suvin Advisors Pvt. Ltd. (Pavitra group company), incepted in August 2010 is an Indian professional engineering consulting firm. Suvin Advisors offers management consultancy, project management consultancy, construction management consultancy and process management services.

Suvin Advisors offers services in various sectors like Textiles, Technical Textiles, Food, Steel, Pharmaceutical, Automobile and Infrastructure.

Suvin Advisors' team of experienced professionals includes MBA's, Textile experts, Civil engineers, Structural, Mechanical, Electrical, Architects and Food technologists. Suvin Advisors is a team of highly skilled and trained professionals to cater to all your needs. Our TEAM is capable of handling projects like strategic business development, market research, mergers & acquisitions, master planning, architectural services, structural designing, utility designing, construction management, process management etc.

Strengths of Suvin Advisors Pvt. Ltd. are:

- Priority to customer needs
- Ground-breaking ideas
- Market oriented approach
- Scientific project planning & execution
- Result oriented practical solutions
- Team leaders with decades of experience

Scope of Services Offered

Suvin Advisors provides the entire range of Project Consultancy services, from concept to completion. The services are undertaken to meet the specific requirements of the project under consideration.

- Market survey and analysis, market research, business strategy, location analysis, marketing tie-ups & joint ventures
- Preliminary investigation
- Feasibility studies
- Project reports, assistance in obtaining statutory approvals, assistance in getting finance from financial institutions



Current Scenario of Textile Machinery

- Conceptual designs and documentation
- PERT/CPM programming, time and cost control analysis
- Pre-designing activities & project management which involves master planning, architecture, civil, utility & structural designing, electrical engineering, tender management

Major Activities

- Textiles Technology, Engineering and Management
- Food Processing
- Infrastructure Development
- Pharmaceuticals, Chemicals
- Environmental Engineering, Water Supply, Sewerage, Sanitary, Plumbing, Water Treatment, Waste Water Treatment, Pollution Control, Recycling

Let us carve out tomorrow!

Current Scenario of Textile Machinery



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