

India's Textile Machinery Landscape

Opportunities for Investments Collaboration

INDIA: The Fastest Growing Large Economy

Rapid GDP Growth



Growth rate of 8.2% in FY 2023-24

Rising Per Capita Income

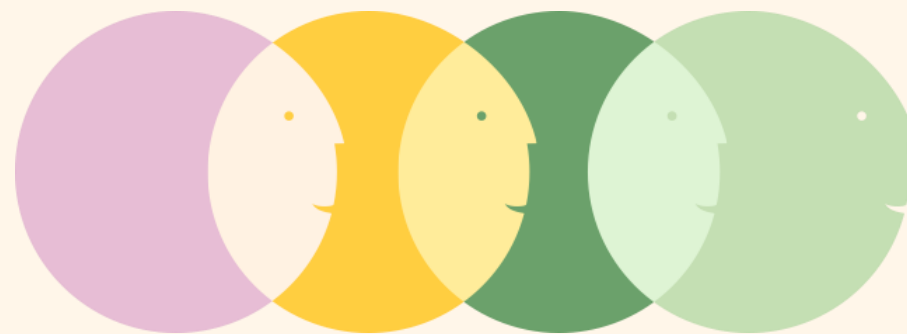
Currently at USD 2,800,
Expected to be USD 26,000 by 2047



3rd Largest Economy by 2027-28

Currently at USD 3.7 Tn,
Likely to be USD 30 Tn by 2047

Young Workforce



2nd largest working population,
593 Mn with median age - 28 yrs



3rd Largest Startup Ecosystem

108 Unicorns with valuation over USD 340 Bn

Towards Net Zero



4th largest producer of RE; expected to unlock USD 1
Tn investment in solar in India by 2030

INDIA: A Global Textile Hub



2.3%

Contribution of Textiles to
India's GDP

4.5%

Share in Global Apparel Trade



\$350 Bn

Projected Market Growth by 2030

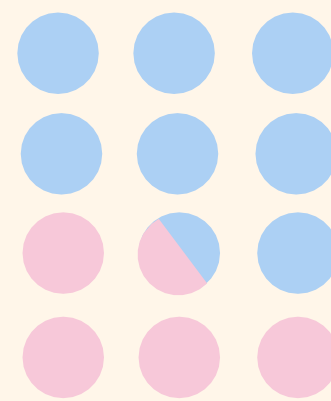


\$176 Bn

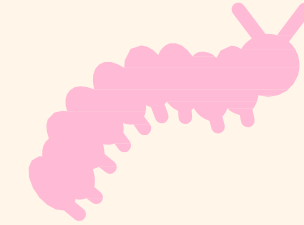
India's Textile & Apparel Market \$13G Bn
Domestic Market \$37 Bn exports

45 Mn

Largest employer after
Agriculture 75% women
workforce

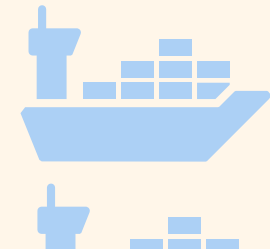
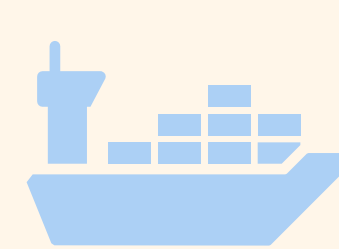


2nd



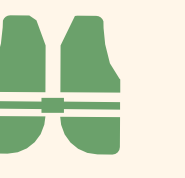
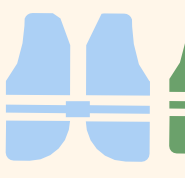
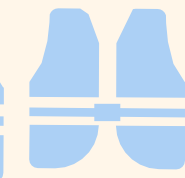
Largest Producer of Silk, Cotton & Viscose

4th



Largest Exporter of Textiles

5th



Largest producer of Technical Textiles -
Market size of 22 Bn



Proactive Policy Support
from Union and State Governments

From Farm to Fashion - India offers the Complete Textile Value Chain

Rajasthan

SPINNING	WEAVING	KNITTING	GARMENT
	Jaipur	Jaipur	Jaipur
	Ajmer	Alwar	Pali
Bhilwara	Bhilwara		Bikaner
Udaipur	Udaipur	Udaipur	Udaipur

Punjab

SPINNING	KNITTING	GARMENT
Ludhiana	Ludhiana	Ludhiana

Gujarat

WEAVING	KNITTING	PROCESSING	GARMENT
Surat	Surat	Surat	Ahmedabad
Ahmadabad		Vapi	

Maharashtra

SPINNING	WEAVING	PROCESSING	GARMENT
Yavatmal	Ichalkaranji	Ichalkaranji	Mumbai
Dhule	Malegaon	Bhiwandi	Thane
Nagpur	Bhiwandi	Mumbai	Pune

Tamil Nadu

SPINNING	WEAVING	PROCESSING	GARMENT
Erode	Madurai	Tirupur	Tirupur
Coimbatore	Salem	Karur	Erode
Madurai	Erode		
	Coimbatore		

West Bengal

PROCESSING	GARMENT
Kolkata	Kolkata
Durgapur	

Himachal Pradesh

SPINNING	GARMENT
Baddi	Una

Uttar Pradesh

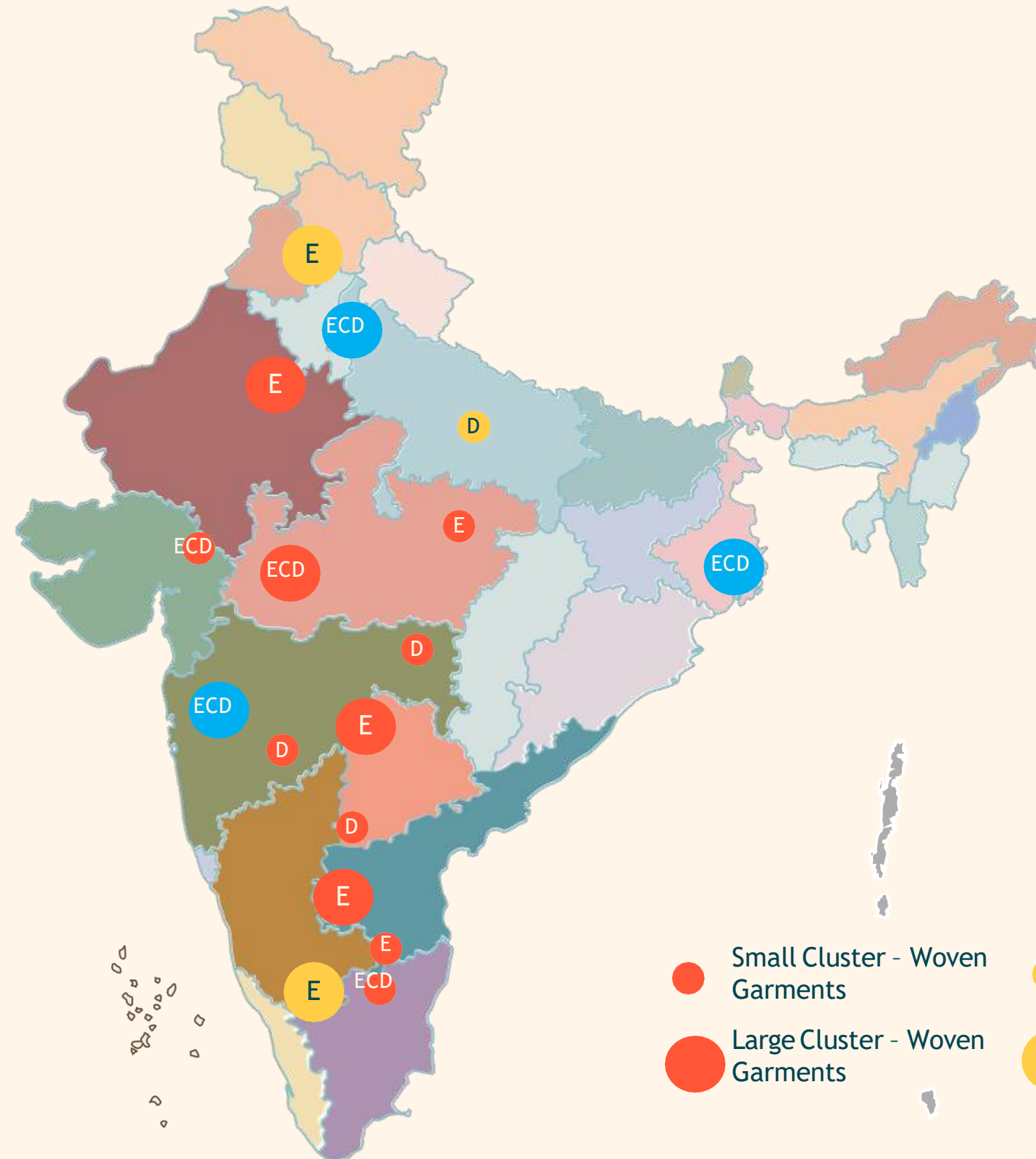
WEAVING	GARMENT
Meerut	Kanpur
Varanasi	Amroha
Gorakhpur	Mathura

Madhya Pradesh

WEAVING	GARMENT
Indore	Indore
Ujjain	Jabalpur
Burhanpura	

Andhra Pradesh

SPINNING	GARMENT
Guntur	Raydurga



- Small Cluster - Woven Garments
- Small Cluster - Knitted Garments
- Large Cluster - Woven Garments
- Large Cluster - Knitted Garments
- Large Cluster - Woven Knitted Garments
- E - Exports
- D - Domestic

Indian textile industry has achieved world scale in 5 segments

Spinning

2nd largest
ring spinning
capacity in the
world (56 Mn
ring spindles)
representing
25% market
share



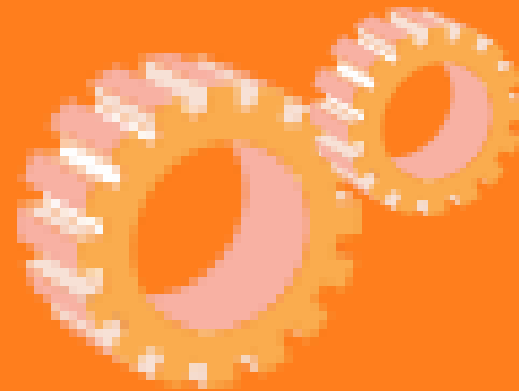
Home Tex

**Among top
3 players**
in bedlinen and
terry towels with
world scale
capacities



Machinery

India has emerged
as the **hub for
ring spinning
machinery** for
domestic and
export market



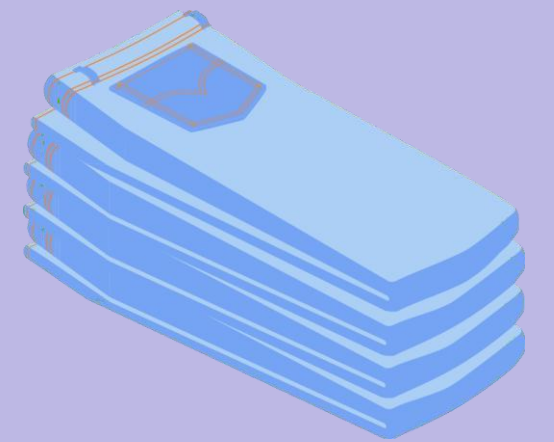
Tech Tex

**No. 1
exporter**
of FIBC (flexible
intermediate
bulk containers)
packtech with
complete
integration of
value chain



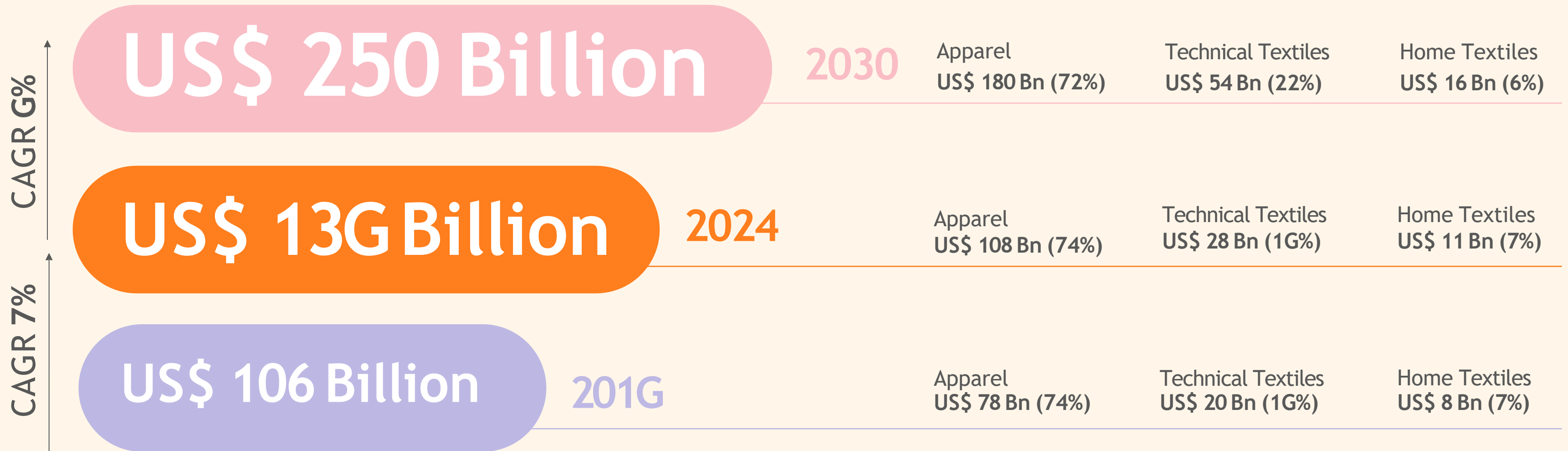
Denim

**No. 2
producer**
of denim
production
(1.6 bn
metres p.a.)



India's domestic market is growing rapidly

With over 1.4 billion consumers and a rapidly growing middle class, India represents one of the world's most dynamic markets



India Wears It All

LUXURY: >\$25000,
35M population

BURBERRY **BALENCIAGA** 
PRADA GUCCI **VERSACE** 

PREMIUM: \$14000 - \$25000,
140M population

LACOSTE **BOSS**   ck 
 TED BAKER *Brooks Brothers*  **ALDO**
 TOMMY  **HILFIGER**

VALUE: \$3500 - \$14000,
720M population

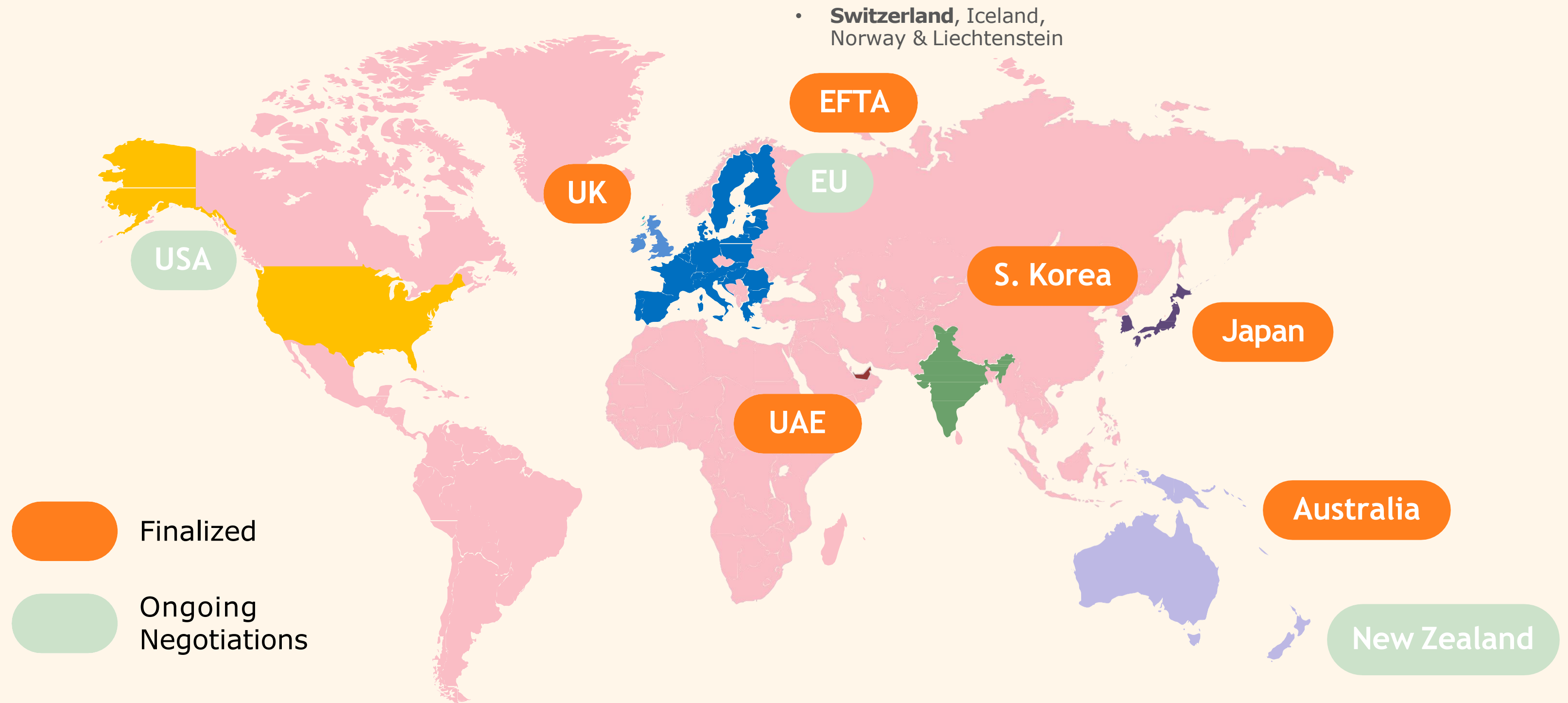
 RARE RABBIT      **MUJI** 
ZARA AMERICAN EAGLE M&S VAN HEUSEN  **JOCKEY**  U.S. POLO ASSN.
SINCE 1890

MASS: <\$3500 -
525M population

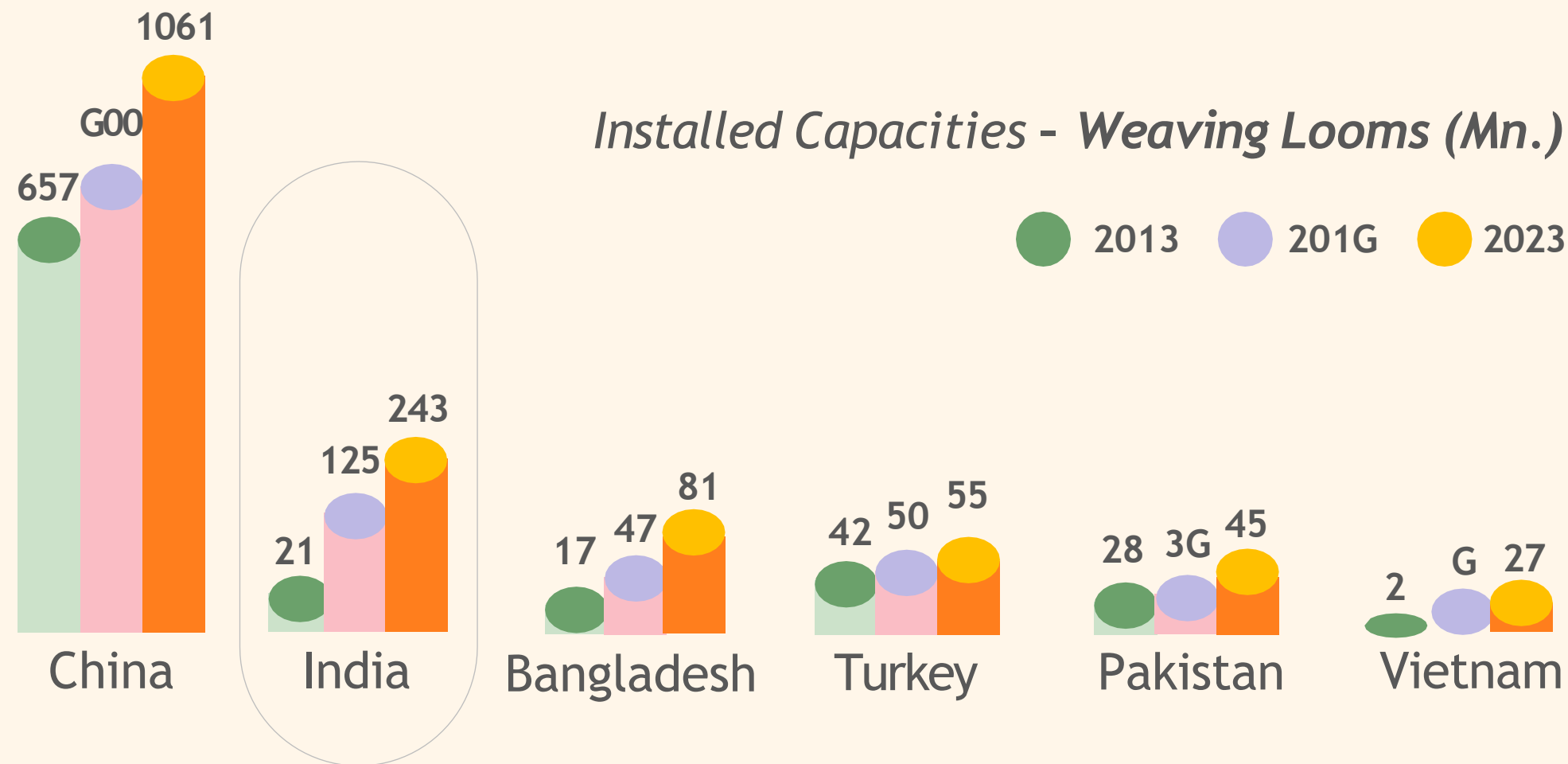
zudio  **HRX**  **DECATHLON** 
    **D Mart** **max** 

India - A market of Markets

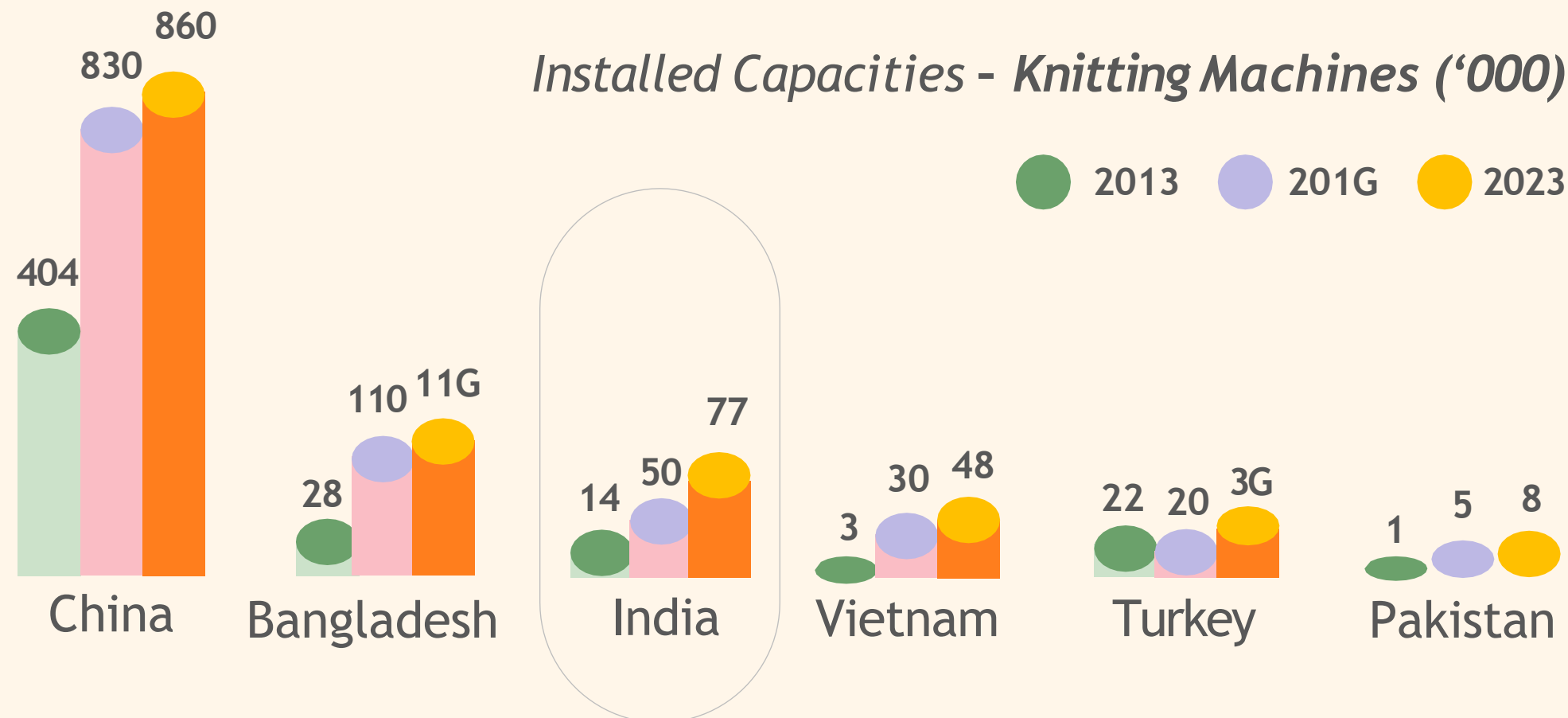
India's Global Market Access is Large and Growing



Installed Capacities - Weaving Looms (Mn.)

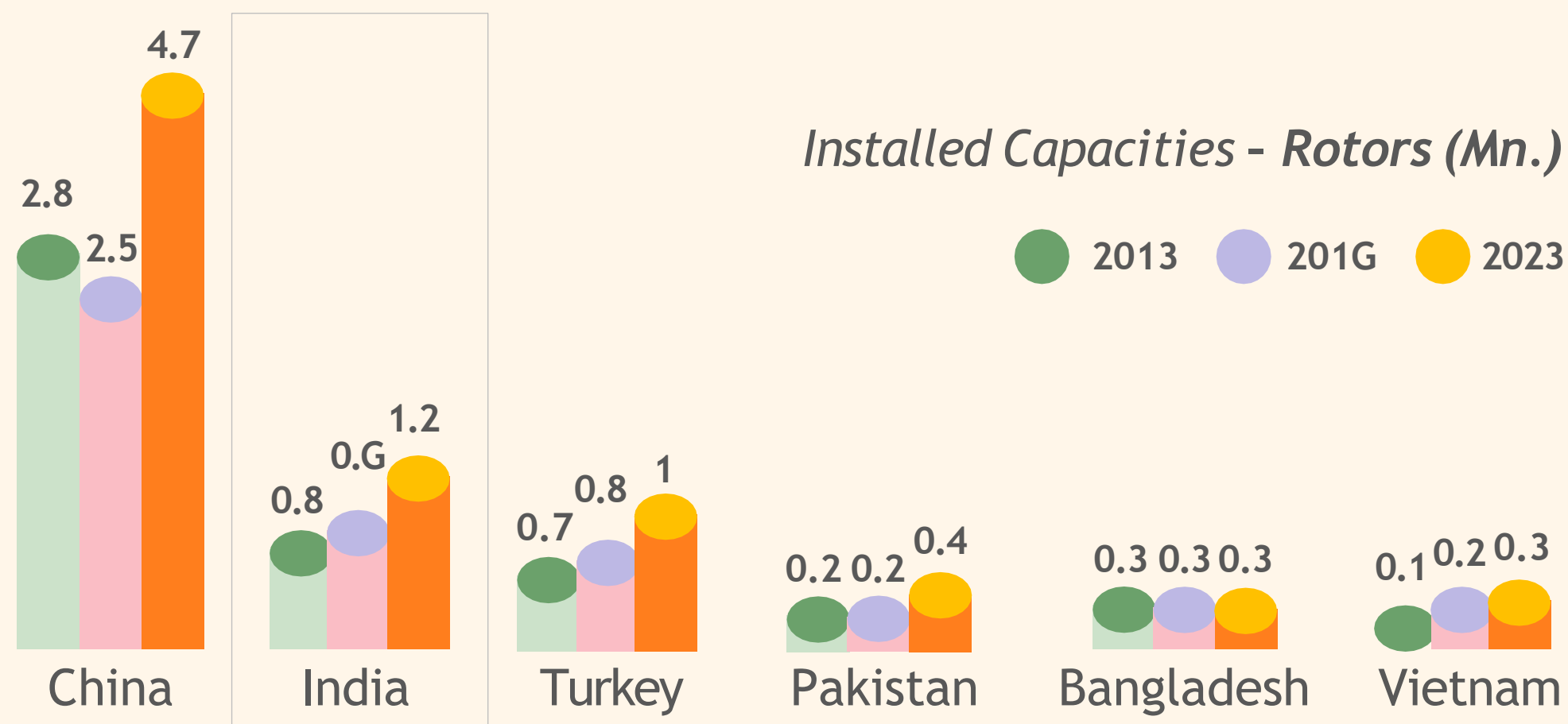
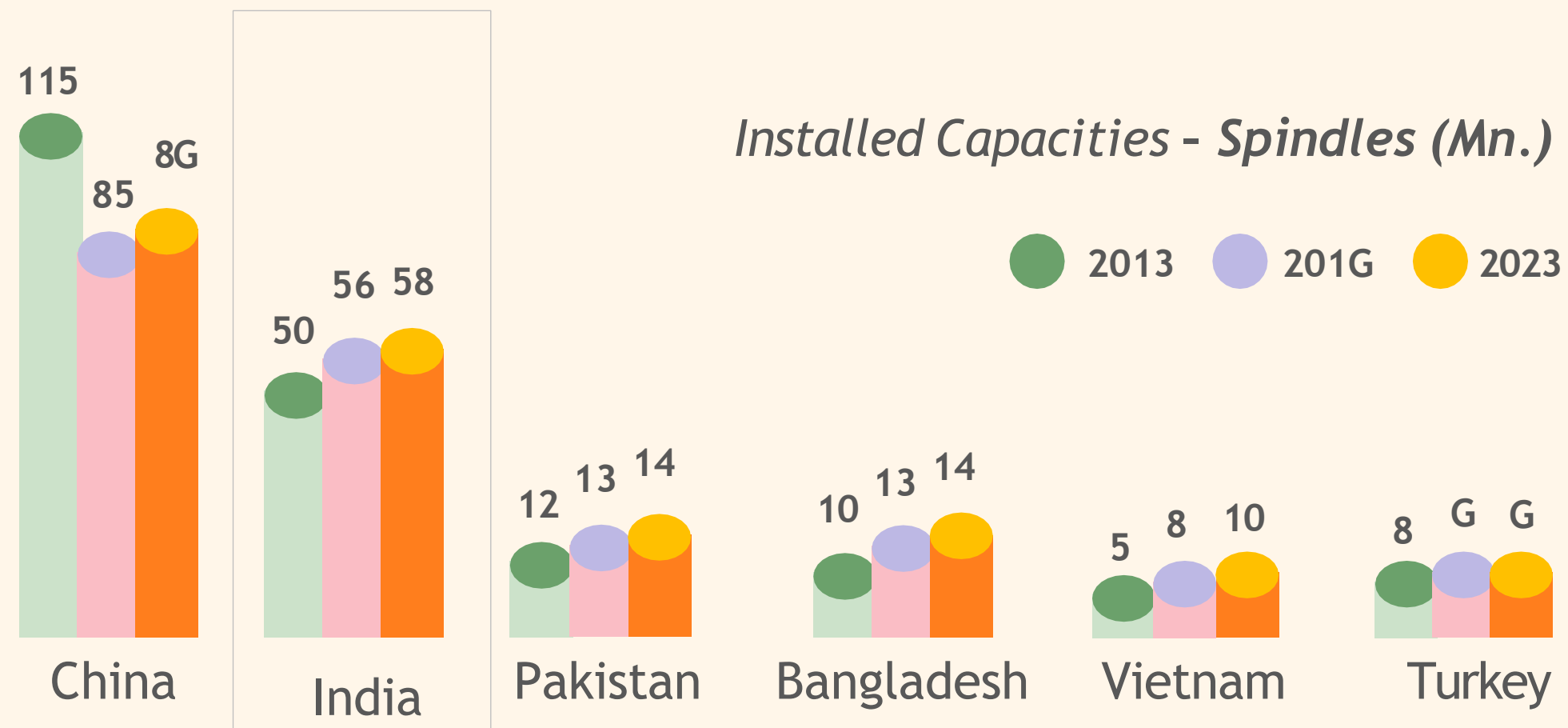


Installed Capacities - Knitting Machines ('000)



India is among the
Top Global Hubs in
Weaving and
Knitting Machinery
Installations -
Reflecting strong
expansion across
the Fabric and
Apparel Value Chain

90% of All Investments in the Textile Sector over the Last Decade Were Concentrated in Three Countries, with India Ranking Second



Indian Textiles – A Strategic Vision for 2030

Domestic Market 8.75% CAGR

\$350 Bn

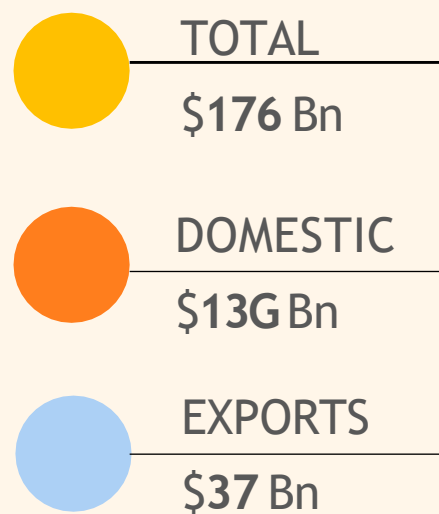
Combined projected for
the year 202G-30

\$250 Bn

\$100 Bn

Exports 15.26% CAGR

As per year 2022-23



8-10 Well-Established Global Brands

50-60 Manufacturing Champions

Technical Textiles Powerhouse:
USD 28 Bn

Global Leader in Sustainability

वस्त्र मंत्रालय
MINISTRY OF
TEXTILES

The chart displays the export value in US\$ Bn for various textile products across different categories. The categories are Manmade Fibres, Spinning, Knitting, Weaving, Processing, Garments, Made-ups, and Technical Textiles. The y-axis represents the value in US\$ Bn, ranging from 0 to 7. Bubbles are colored and sized to represent the value, with some bubbles containing numerical labels.

Category	Value (US\$ Bn)
Manmade Fibres	0.1, 1.0, 2.0, 3.5, 5.0
Spinning	0.1, 1.0, 2.0, 3.0, 4.0, 5.0, 6.1
Knitting	0.1, 1.0, 1.5, 3.0
Weaving	0.1, 1.0, 1.6, 3.0, 4.0
Processing	0.1, 1.0, 2.0, 4.0, 5.5, 7.0
Garments	0.1, 1.0, 2.0, 3.0, 4.0, 5.0, 6.1
Made-ups	0.1, 2.0, 1.0, 3.0
Technical Textiles	1.0, 2.0, 3.0, 4.0, 5.0, 6.0, 6.5

India - The next global hub for Textile Machinery Manufacturing.

Vision

To establish India as a world-class hub for textile machinery design, engineering's manufacturing, serving both its vast domestic textile ecosystem and export markets across Asia, and Africa

Strengths

Large and fast-growing market

Engineering depth, manufacturing competence, policy stability and a shared commitment to sustainability & innovation

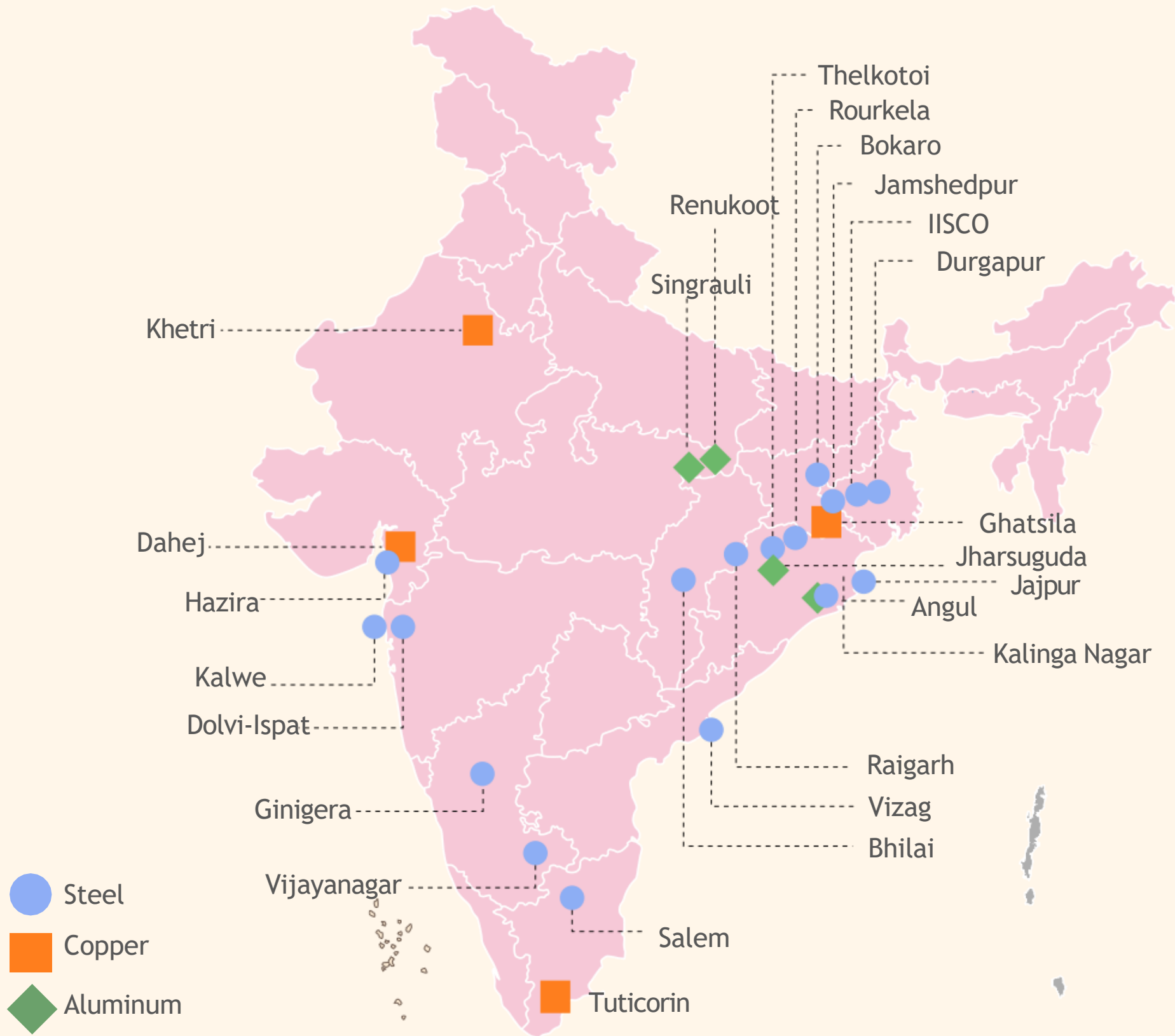
India-the fastest growing textile machinery market

A strategic proposition for global OEMs



India offers a 4-in-1 advantage for international manufacturers in the form of: **Locate - Manufacture - Export - Serve**

A Vibrant Machinery Ecosystem



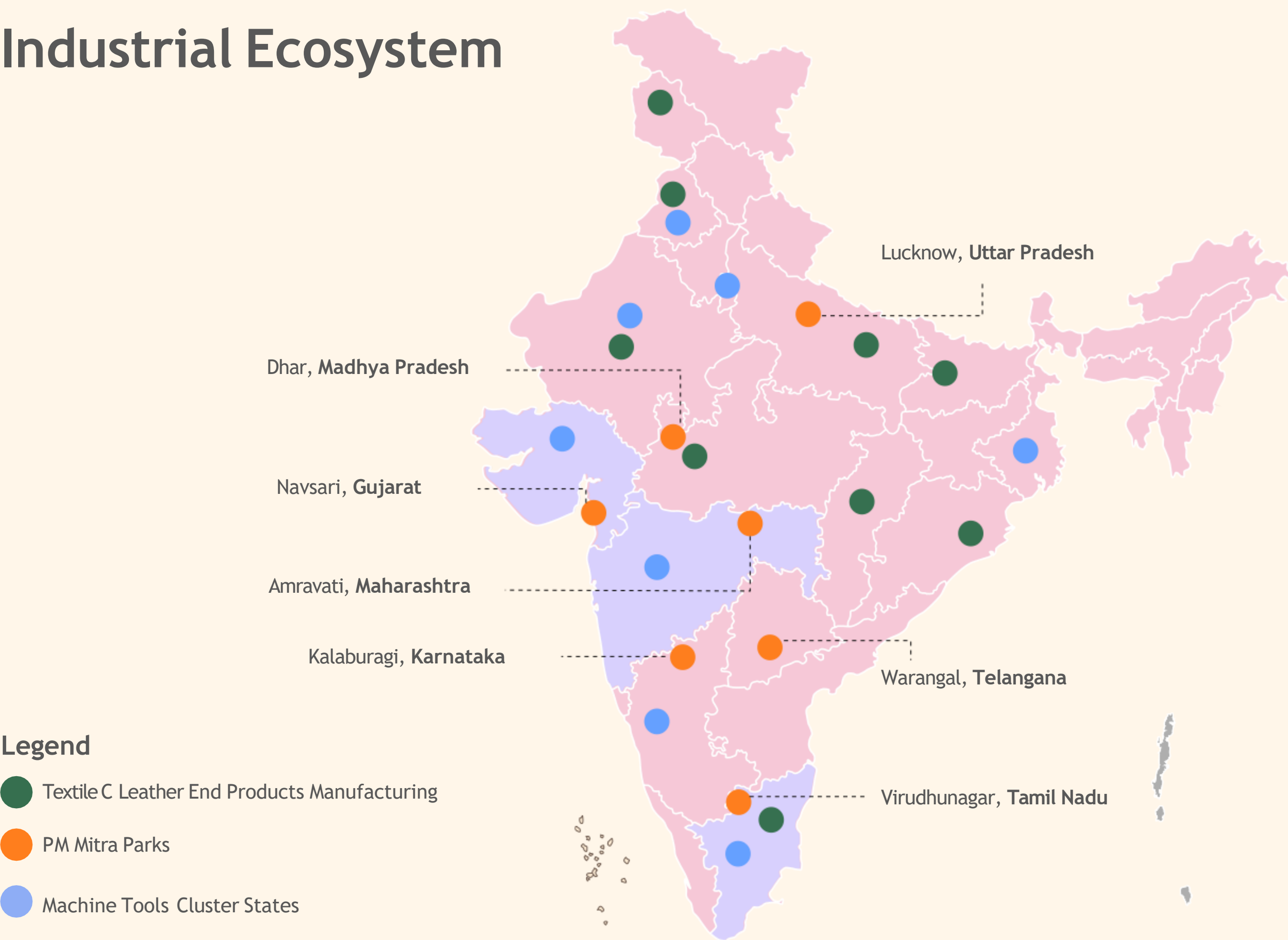
Raw Material	India Availability Status
Cast Iron	
Copper	
Aluminium	
Steel	
Specialty Steel	
Engineering Plastics	
Ceramics	
Brass	

Capability Exists

1-3 Year Roadmap

3-5 Year Roadmap

Industrial Ecosystem



Legend

-  Textile C Leather End Products Manufacturing
-  PM Mitra Parks
-  Machine Tools Cluster States
-  Textiles Machinery Manufacturing Companies Cluster

Gujarat

Ahmedabad, Vadodara,
Surat, Valsad



Maharashtra

Chembur, Mumbai



Tamil Nadu

Coimbatore



India’s emerging machinery clusters

Cluster	Focus Segment	Advantages
Coimbatore (TN)	Spinning, Knitting, Processing, Automation	Strong textile & engineering base, deep supply chain
Surat (GJ)	Weaving, Knitting, Dyeing, Finishing	Synthetic textile hub, investor-friendly state
Pune/Aurangabad (MH)	Component Manufacturing, Mechatronics	Access to auto & precision engineering base
Panipat (HR)/Ludhiana (PB)	Knitting, Recycling, Finishing	Strong MSME network and manpower availability
Ahmedabad/Rajkot (GJ)	Machine Tools & Precision Parts	Mature supplier ecosystem for castings, gears, spares

India's competitive advantage snapshot

Factor	India	China	EU/Japan
Labour Cost	Low	High	Very High
Market Size	High	High	Moderate
FDI Policy	100%	Restricted	Restricted
Engineering Base	Strong	Strong	Strong
Component Supply Chain	Expanding	Mature	Mature
Green Manufacturing Push	Strong	Moderate	Strong
Language	No barrier	Barrier	Barrier
Legal Environment	Common Law	Restricted	Mature
IP C JV Protection	Strengthening	Limited	High

Key investment avenues global OEM's

Segment	Market opportunity	Rationale
Weaving, Knitting Machinery	High (Domestic + Exports)	Ongoing modernisation of 60000+ looms and expansion in Man-made Filament (MMF) textiles
Processing s Finishing Machines	Very High	Sustainability mandates, digital printing, low-liquor dyeing and finishing
Technical Textiles s Nonwovens	High	Growth in geotextiles, medical, and protective textiles
Textile Recycling	Emerging/High	EU DPP and EPR driving recycling capacity build-up
Automation, Robotics s Control Systems	Very High	Industry 4.0 adoption
Testing, Inspection and Certification Equipment	High	Mandatory traceability and quality compliance growth

100% FDI investments in Textile Machinery



GROZ-BECKERT®

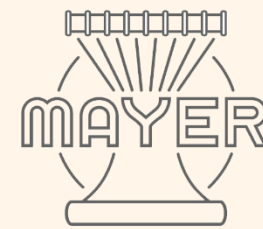
epic
GROUP
Relentless pursuit of better

MAS
CHANGE IS COURAGE

SAURER.

RIETER

Successful Joint Ventures in India



KARL MAYER



A SUPPORTIVE POLICY ECOSYSTEM

Samarth Scheme

Building Capacity, addressing skill gaps in the textile value chain. A placement oriented, industry driven skilling program across the textile value chain. In addition, various States have their own skilling/training support schemes too.

Policy Support, Incentives by the States

Liberal policy support and generous incentives by State Government including capital support, wage and skilling incentives, power and water subsidies

Pradhan Mantri Mega Integrated Textile Region and Apparel Parks (PM-MITRA) Scheme

Creating an integrated Textiles Value Chain.
7 Mega Textile Parks with an expected investment of USD 10 Bn are being set up with world class infrastructure, plug and play facilities and an integrated ecosystem

Production Linked Incentives (PLI) Scheme for Textiles

Boosting manufacturing of MMF Fabrics, Apparel and Technical Textiles. PLI Scheme with approved incentives of INR 10,683 crore (~USD 1 Bn) to promote production of MMF Apparel, MMF Fabrics and Technical Textiles products

National Technical Textiles Mission

Promoting Technical Textiles- towards USD 300 Bn by 2047. National Mission to support and promote Research, Innovation and Development, Education Training, RCD in machinery, Skill Development and Market Development in Technical Textiles

India invites the world's leading textile machinery manufacturers to partner in a new growth chapter i.e. to **Make in India**, **Design for the World**, and **Lead the Green Transition** in Textiles

Through Policy Stability

World-class Infrastructure

Skilled Talent

Vast Market Ready for Modernization

India stands as the most promising global destination for textile machinery investment in the decade ahead.

Knowledge Partners



GHERZI

wazir
ADVISORS



WWW.INVESTINDIA.GOV.IN

NATIONAL INVESTMENT PROMOTION
& FACILITATION AGENCY



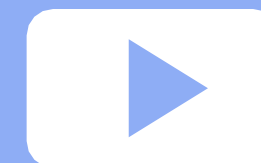
SCAN TO CONNECT
WITH OUR SECTOR
INVESTMENT
SPECIALISTS



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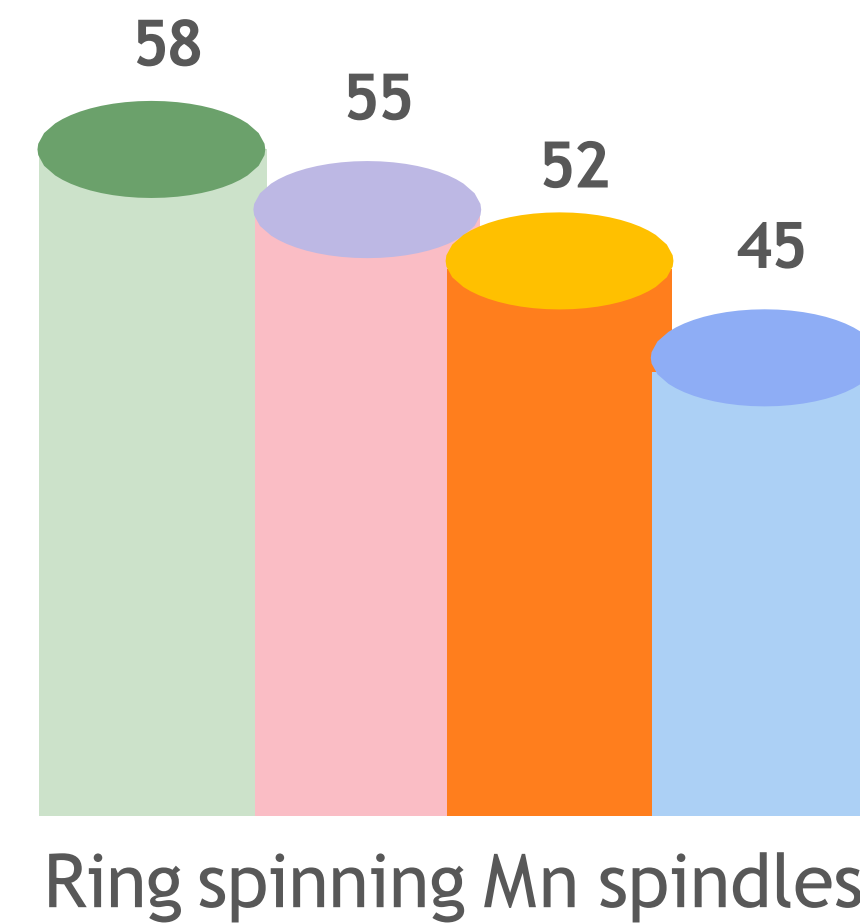
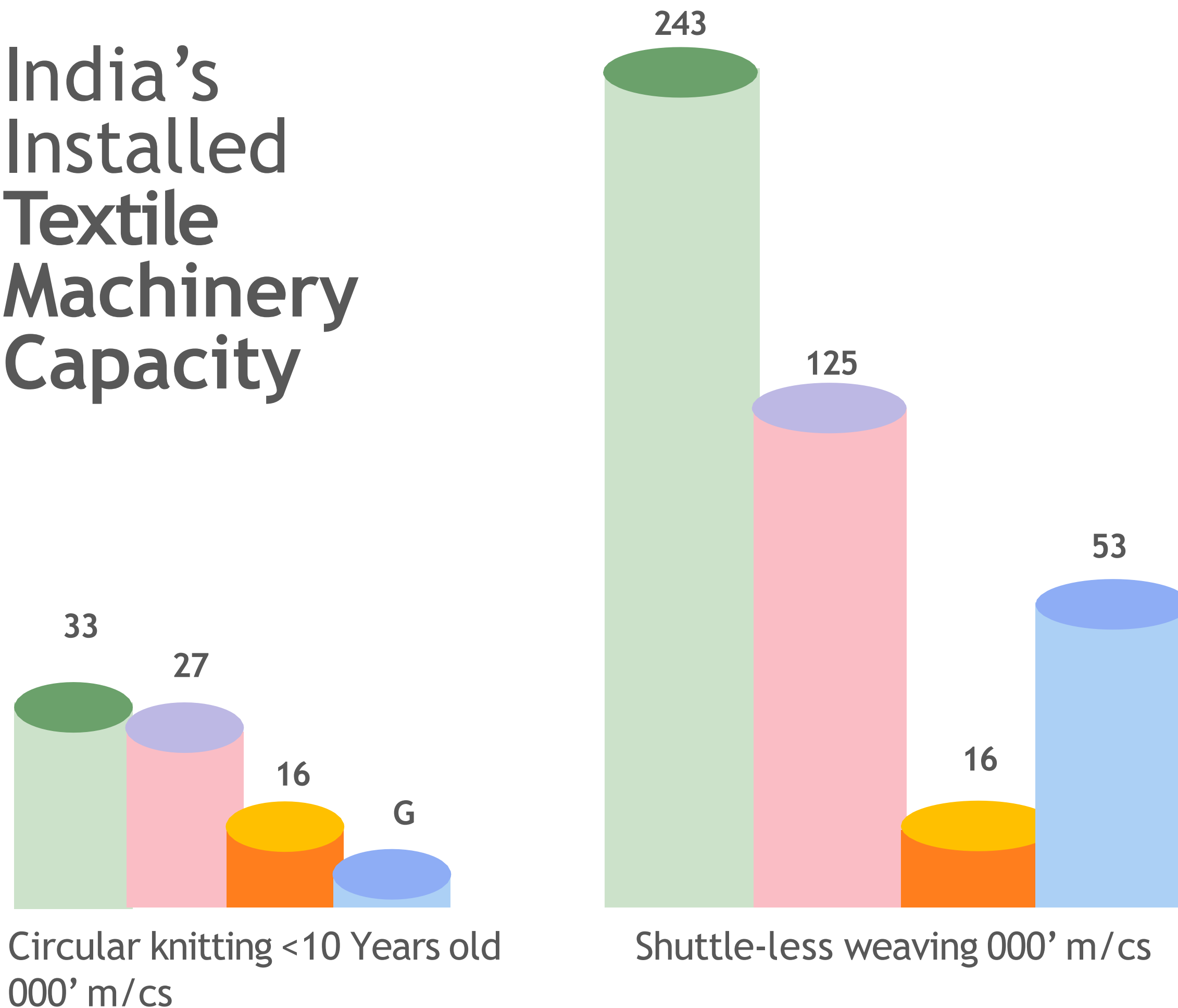


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India's Installed Textile Machinery Capacity



This Presentation was done at India Networking event
Organised by India ITME Society on 29th Oct 2025 in Singapore

THANK YOU