



中国纺织机械协会
China Textile Machinery Association

2021中国纺机行业情况

Situation of China's textile machinery industry (2021)

中国纺织机械协会
2021.11.16
CHINA TEXTILE MACHINERY ASSOCIATION
NOV 16 2021



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01 概述

Overview



➤概述 Overview

- 纺织机械支撑纺织全产业链，品种多、门类广，兼具离散型和流程型制造
- Textile machinery Industry, with many categories and varieties, having the features of discrete and process manufacture, supports the entire textile industry value chain
- 中国纺织机械产业链完整，包括化纤机械、纺纱机械、机织与针织机械、染整机械、非织造布机械、纺织仪器和配套装置、专用基础件以及软件等六百多类产品。生产的纺织品除主要应用于服装、家纺以外，还在国防军工、航空航天等国家战略领域，轨道交通、汽车工业、土木建筑和健康医卫等重要民生领域有广泛应用
- China has the whole textile machinery value chain, including more than 600 types of products, such as chemical fiber machinery, spinning machinery, weaving and knitting machinery, dyeing and finishing machinery, non-woven machinery, textile instruments, accessories and software. These equipment are mainly applied not only in garment and home textile, but also in military, aerospace, railway, automobile, building construction, medical and health



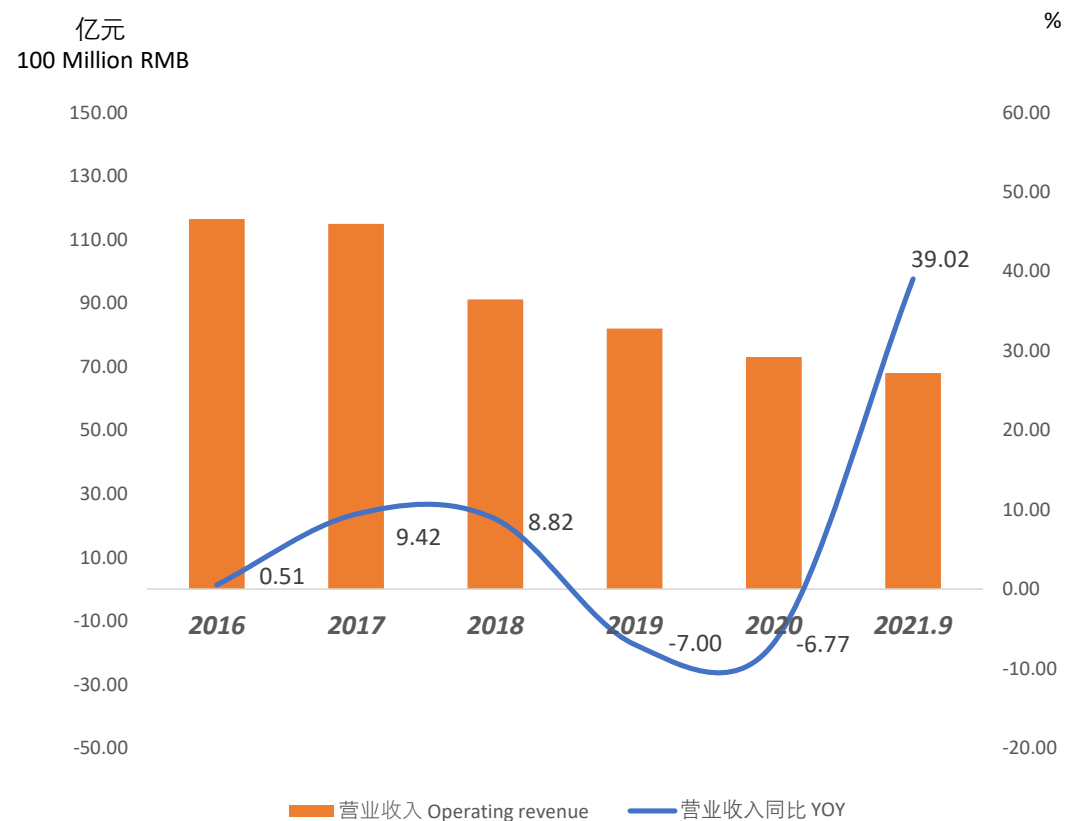
➤ 概述 Overview

- 中国纺织机械产品销售额国内市场占有率已达到75%左右，2020年规模以上纺织机械企业营业收入超过700亿元，出口额达45亿美元
- The market share of domestic textile machinery has reached about 75% in China. In 2020, the income of China textile machinery enterprises above designated size will exceed 70 billion RMB, and the export value will reach 4.5 billion U.S. dollars
- 中国纺织机械出口金额2019年以来跃居全球第一（联合国贸易统计数据库）
- China textile machinery export value ranks first in the world since 2019 (UN Comtrade Statistics Database)



➤ 主要经济指标 Main economic indicators

- 据国家统计局统计，2021年1-9月，规模以上纺机企业实现营业收入同比增长39%
- According to the statistics of the National Bureau of Statistics, from January to September 2021, textile machinery enterprises above designated size achieved an operating revenue increase of 39% (YOY)



注：“规模以上企业”指年营业收入2000万元及以上的工业法人单位
Note: “Enterprises above designated size” refer to industrial legal entities with an annual operating income of 20 million yuan or more



02 中国纺机行业进出口情况

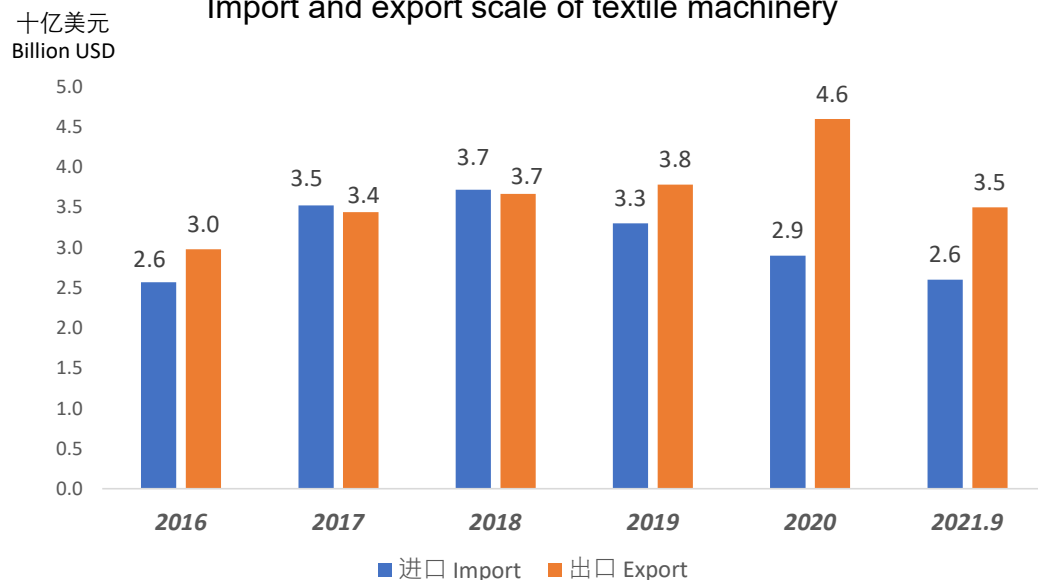
Import and export of textile machinery in China

对外贸易 Import and export trade



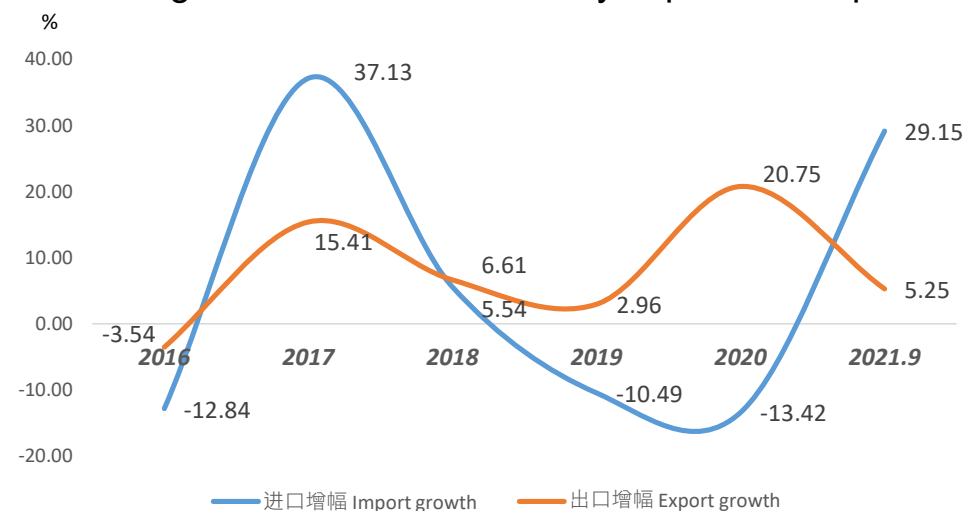
纺织机械进出口规模

Import and export scale of textile machinery



纺织机械进出口同比增长

YoY growth of textile machinery import and export



- 据海关统计，2021年1-9月我国纺织机械进出口累计总额为61.6亿美元，同比增长14%。其中：纺织机械进口26.5亿美元，同比增长29%；出口35.1亿美元，同比增长5%
- According to customs statistics, the cumulative total import and export of China's textile machinery from January to September 2021 was US \$6.16billion, a year-on-year increase of 14%. Among them, the import of textile machinery was USD 2.65 billion, a year-on-year increase of 29%; Exports reached US \$3.51 billion, a year-on-year increase of 5%

进口 Import



● 纺织机械进口来源国家地区情况 Import source countries and regions of textile machinery

2021年1-9月纺织机械进口额
Import of Textile machinery, 2021.1-9

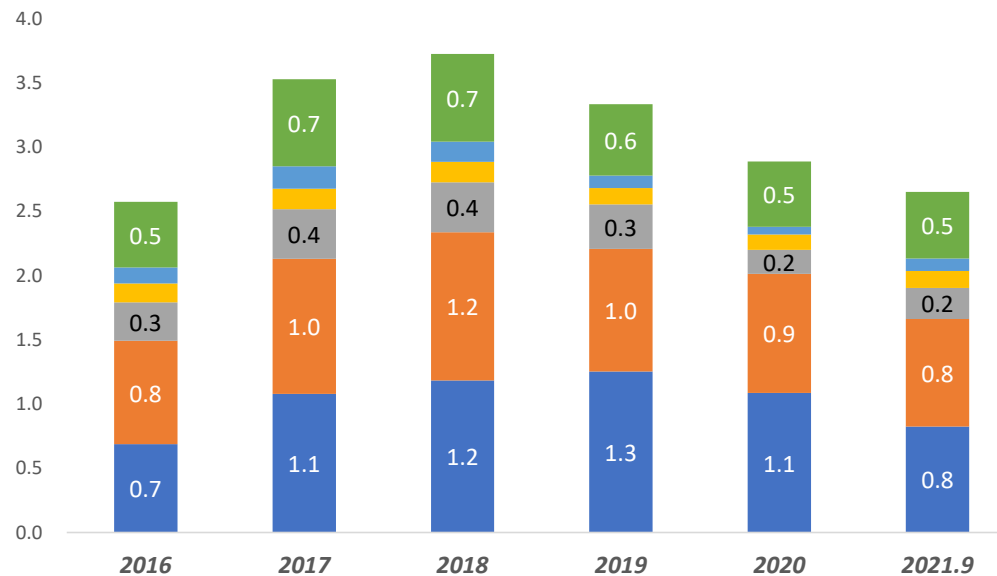
单位:十亿美元,%
Units: Billion USD,%

国别地区 Country & region	累计金额 Cumulative amount	金额同比 YOY
总额 Total	2.65	29.15
德国 Germany	0.84	24.84
日本 Japan	0.82	6.64
意大利 Italy	0.24	85.84
法国 France	0.15	66.83
中国台湾 Taiwan, China	0.13	56.73
其他国家和地区 Other countries and regions	0.46	53.15

十三五期间主要进口来源国家地区情况

Main Import Source Countries and Regions During the 13th Five Year Plan Period

十亿美元
Billion USD



■ 日本 Japan
■ 德国 German
■ 意大利 Italy
■ 中国台湾 Taiwan, China
■ 比利时 Belgium
■ 其他国家和地区 Other countries and regions

进口 Import



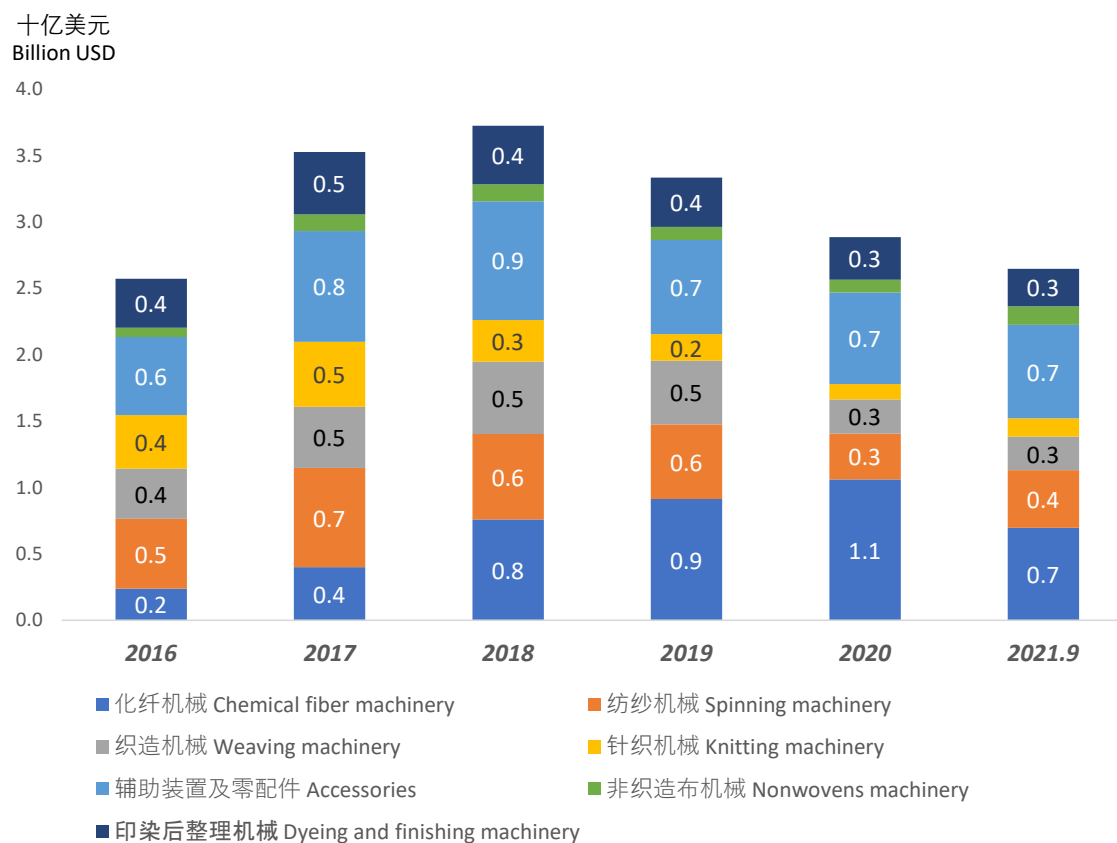
● 纺织机械产品各大类进口情况 Imports of textile machinery products by major categories

2021年1-9月纺织机械进口额
Import of Textile machinery, 2021.1-9

单位:十亿美元,%
Units: Billion USD,%

产品类别 Chapter	累计金额 Cumulative amount	金额同比 YOY
总额 Total	2.65	29.15
辅助装置及零配件 Accessories	0.70	53.79
化纤机械 Chemical fiber machinery	0.69	-11.71
纺纱机械 Spinning machinery	0.43	64.53
印染后整理机械 Dyeing and finishing machinery	0.28	26.75
织造机械 Weaving machinery	0.25	52.89
非织造布机械 Nonwovens machinery	0.14	110.71
针织机械 Knitting machinery	0.14	61.93

十三五期间我国进口纺织机械按大类划分情况
Import of Textile Raw Material & Manufactures During the 13th Five Year Plan Period



出口 Export



● 纺织机械出口主要国家和地区情况 Major countries and regions exporting textile machinery

2021年1-9月纺织机械出口额
Export of Textile machinery, 2021.1-9

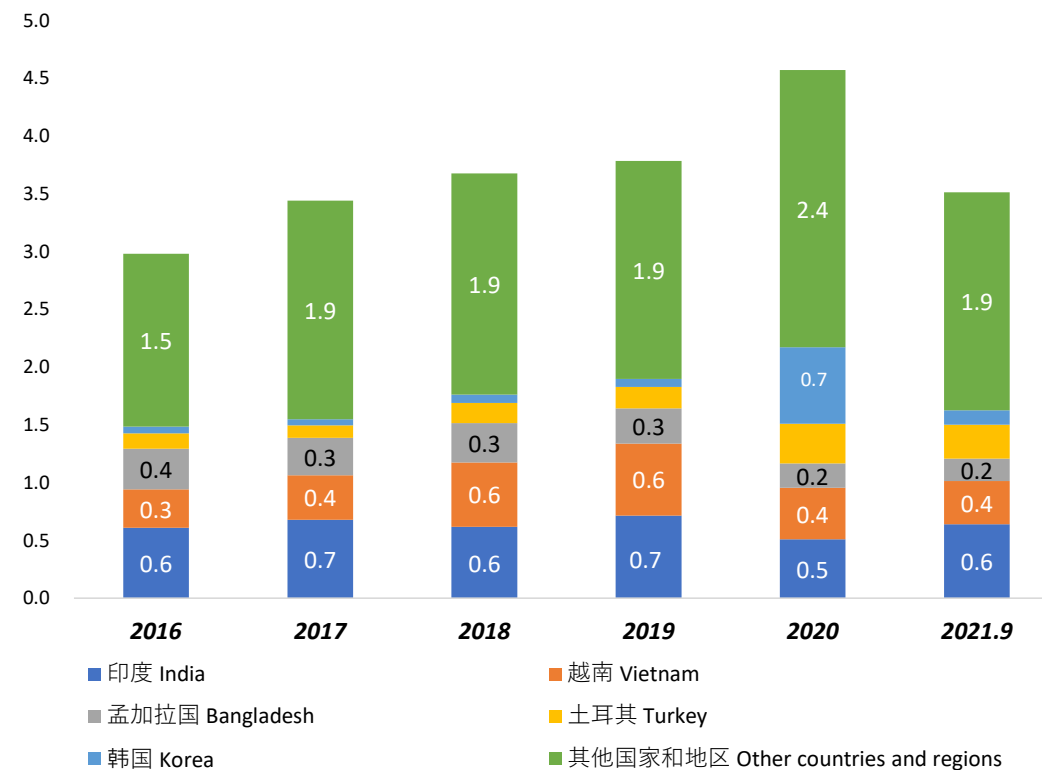
单位:十亿美元,%
Units: Billion USD,%

国别地区 Country & region	累计金额 Cumulative amount	金额同比 YOY
总额 Total	3.51	5.25
印度 India	0.64	83.58
越南 Vietnam	0.37	14.42
巴基斯坦 Pakistan	0.31	163.00
土耳其 Turkey	0.30	23.64
孟加拉国 Bangladesh	0.19	30.71
其他国家和地区 Other countries and regions	1.70	-21.18

十三五期间主要出口国家地区情况

Main Export Source Countries and Regions During the 13th Five Year Plan Period

十亿美元
Billion USD



出口 Export



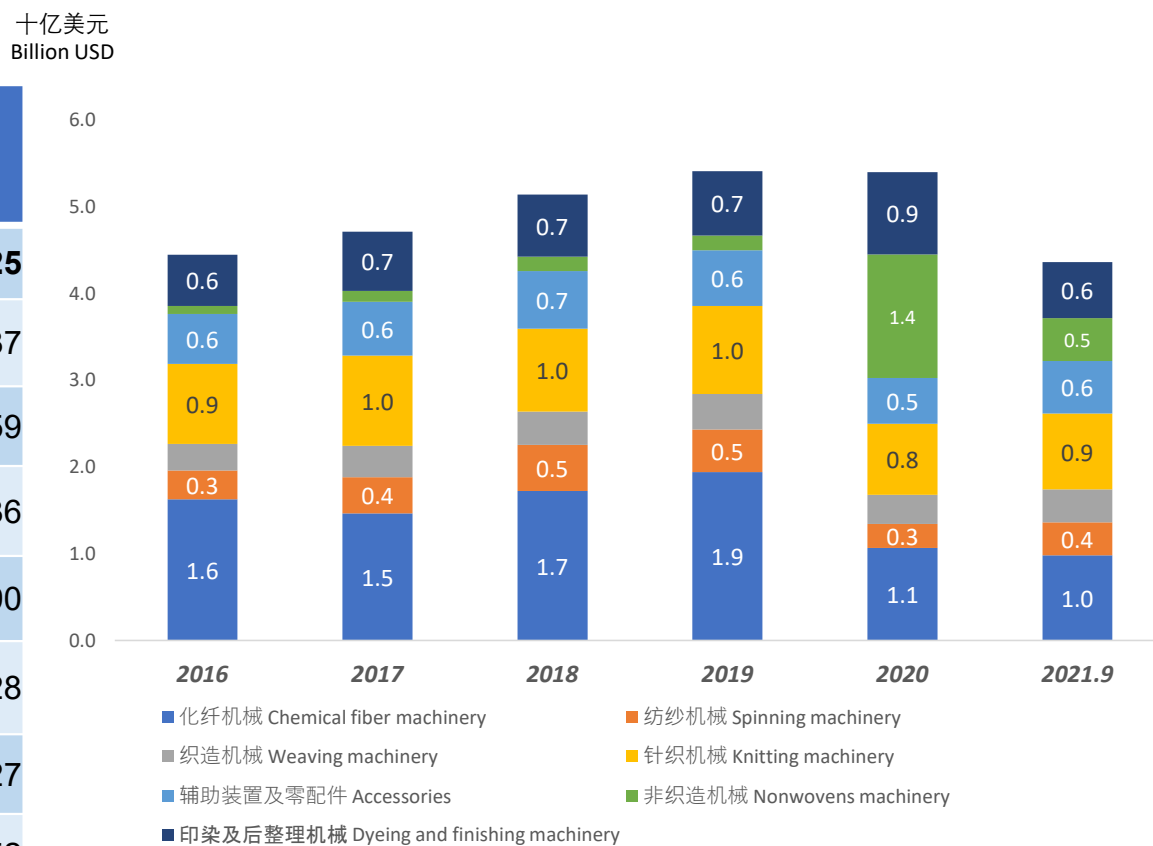
● 纺织机械产品各大类出口情况 Exports of textile machinery products by major categories

2021年1-9月纺织机械出口额
Export of Textile machinery, 2021.1-9

单位:十亿美元,%
Units: Billion USD,%

产品类别 Chapter	累计金额 Cumulative amount	金额同比 YOY
总额 Total	3.51	5.25
针织机械 Knitting machinery	0.87	62.37
印染后整理机械 Dyeing and finishing machinery	0.64	-7.59
辅助装置及零配件 Accessories	0.61	65.36
非织造布机械 Nonwovens machinery	0.49	-56.90
纺纱机械 Spinning machinery	0.38	108.28
织造机械 Weaving machinery	0.38	68.27
化纤机械 Chemical fiber machinery	0.13	-26.52

十三五期间我国进口纺织机械按大类划分情况
Import of Textile Raw Material & Manufactures During the 13th Five Year Plan Period





03 主要产品销售情况

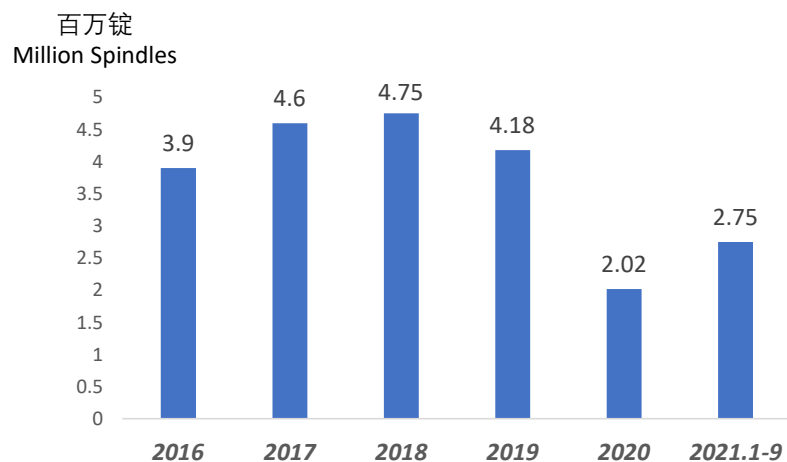
Sales of main products

2016-2020年主要产品销售情况 Sales of main products



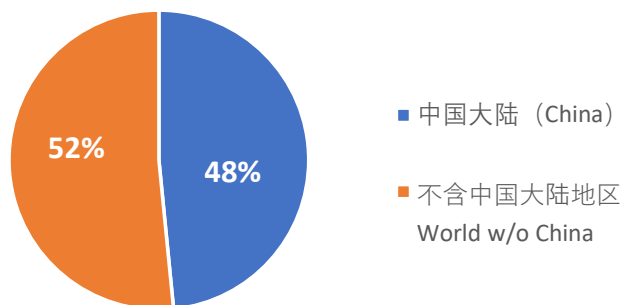
➤ 环锭细纱机 Short-staple Ring Spindles

● 新增产能 New capacity



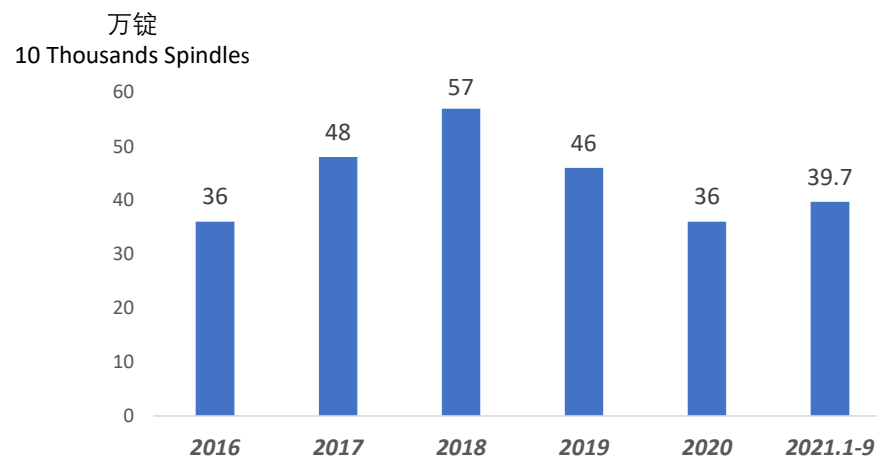
● 平均新增产能占比 (2016-2020)

Proportion of average new capacity (2016-2020)



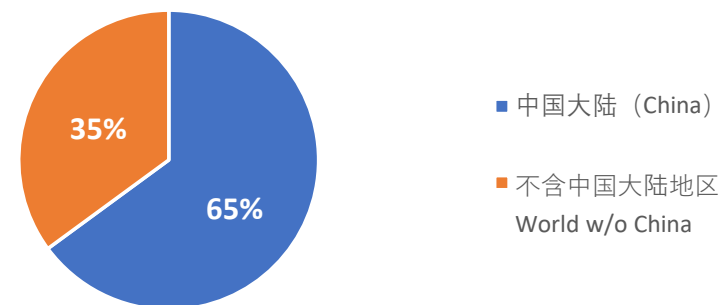
➤ 气流纺 Rotors

● 新增产能 New capacity



● 平均新增产能占比 (2016-2020)

Proportion of average new capacity (2016-2020)

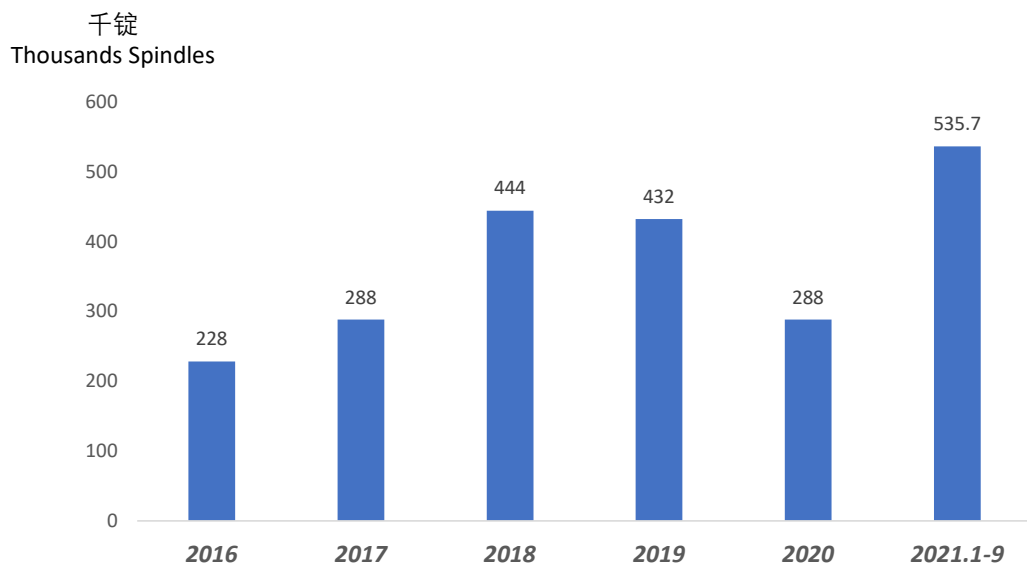


2016-2020年主要产品销售情况 Sales of main products



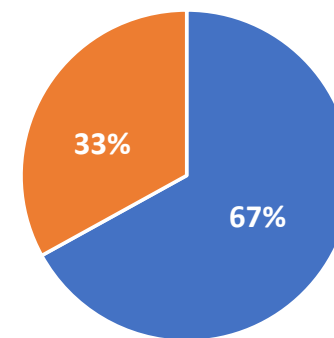
➤ 弹力丝机 Draw texturing

● 新增产能 New capacity



● 平均新增产能占比 (2016-2020)

Proportion of average new capacity (2016-2020)



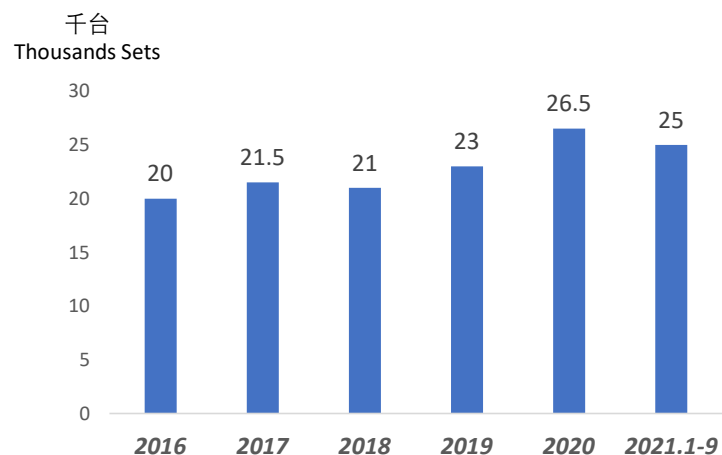
■ 中国大陆 (China) ■ 不含中国大陆地区 World w/o China

2016-2020年主要产品销售情况 Sales of main products



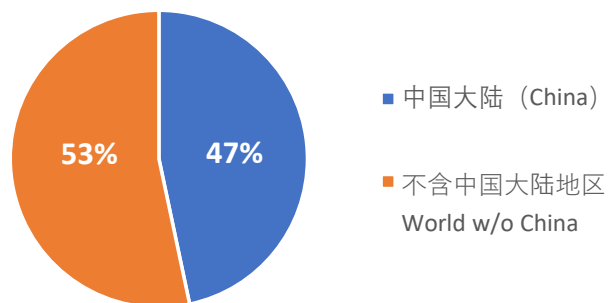
圆机 Circular Knitting

● 新增产能 New capacity



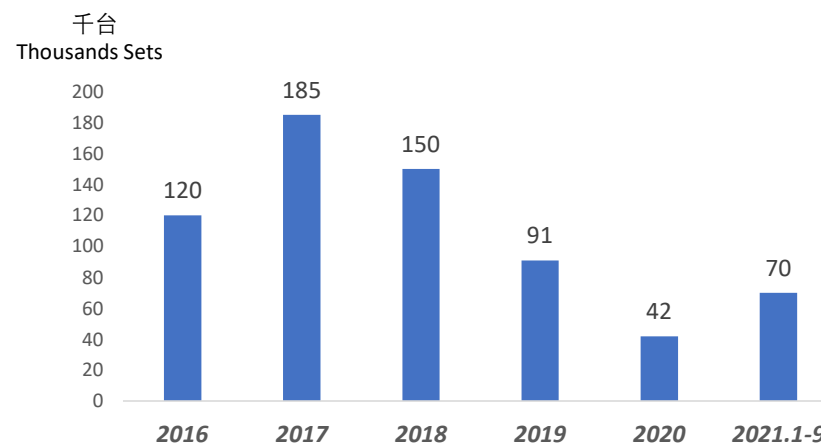
● 平均新增产能占比 (2016-2020)

Proportion of average new capacity (2016-2020)



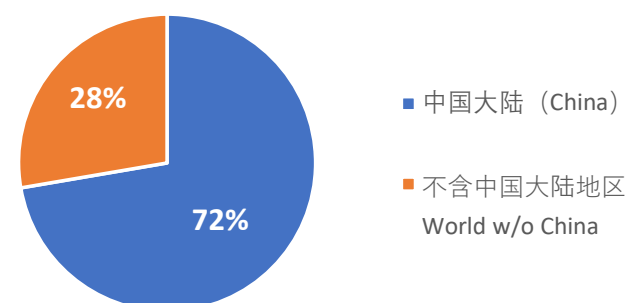
横机 Flat Knitting Machinery

● 新增产能 New capacity



● 平均新增产能占比 (2016-2020)

Proportion of average new capacity (2016-2020)

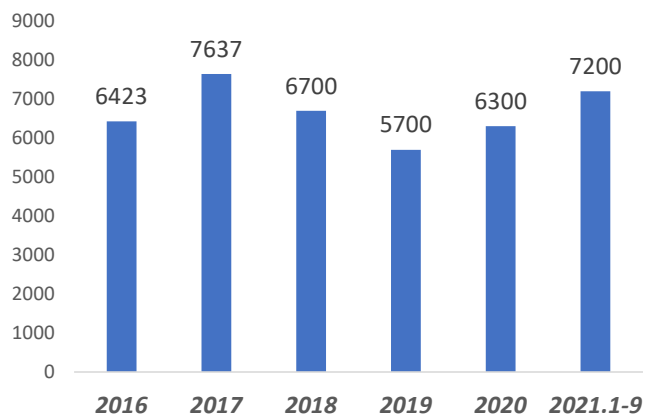


2016-2020年主要产品销售情况 Sales of main products



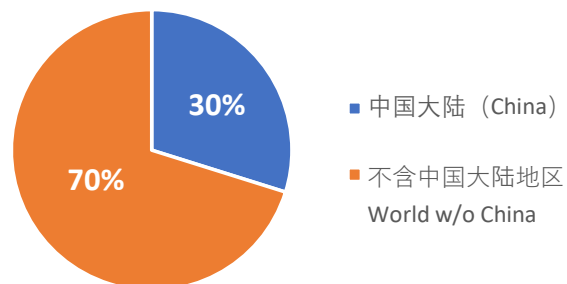
➤ 剑杆织机Rapier (高端 high-end)

● 新增产能 New capacity



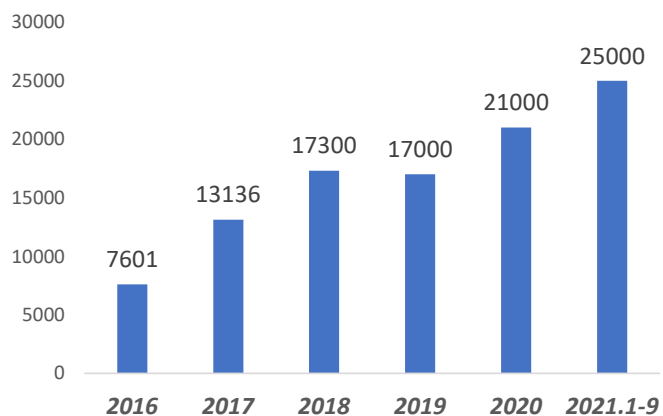
● 平均新增产能占比 (2016-2020)

Proportion of average new capacity (2016-2020)



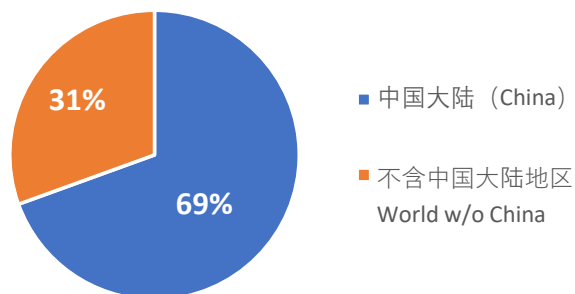
➤ 喷气织机Air-jet

● 新增产能 New capacity



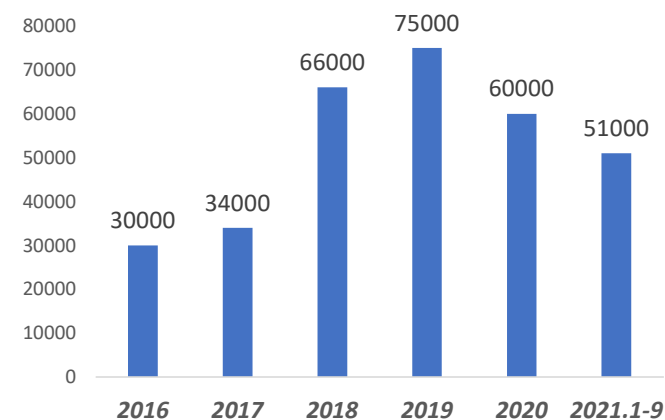
● 平均新增产能占比 (2016-2020)

Proportion of average new capacity (2016-2020)



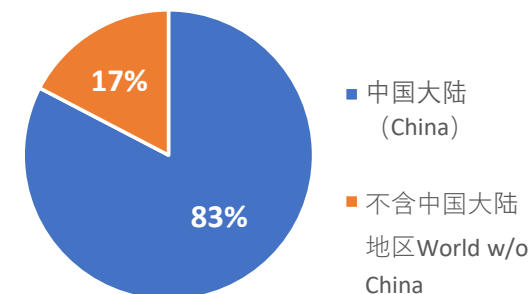
➤ 喷水织机Water-jet

● 新增产能 New capacity



● 平均新增产能占比 (2016-2020)

Proportion of average new capacity (2016-2020)





04 展望 Outlook



➤ 展望 Outlook

- 世界科技的发展（5G、视觉、云计算等）和去年爆发的新冠疫情，将极大影响来和改变世界产业发展的形态及产业链的布局，纺机也是同样
- The development of science and technology (5G, VI, Cloud, etc.) and the epidemic of COVID-19 will greatly impact and change the form of Global industrial development and the layout of the industrial chain. So does the textile machinery industry
- 目前中国纺织发展到高质量阶段及疫情控制好，产业链生产稳定持续。同时在解决“用工、增效和提质”方面的挑战和需求更为迫切。对装备的连续化、自动化、智能化和智慧化，绿色化及规模化的定制化等不同层次需求高涨，特别是对纺机的需求中国仍为全球之首
- Nowadays, China textile industry has reached a high-quality stage with the well controlled of epidemic and the stable industrial chain. Meantime, the industry is more urgent to solve the challenges of “employment, efficiency and quality improvement”. There is a high demand for equipment of automation, intelligence, green and large-scale customization, especially for the world’s largest market



➤ 展望Outlook

- 中国“双碳”目标，这是低碳的发展约束目标，纺机在绿色化，节能减排方面，将为纺织及纺机行业开辟新的发展路径
- For China's '30·60' decarbonization constraint goal, textile machinery industry will create a new development path in green production, energy saving and emission reduction, not only for itself, but also for the textile industry
- 中国经济“双循环”发展，将融合国内外更多的纺织、纺机的合作和交流，共创未来纺织和纺机
- The "dual circulation" strategy of China will accelerate more domestic and foreign industry communication and cooperation, looking foreword to create a bright future for textile and textile machinery

Thanks