

# Longarm Quilting Machine Global Market Insights 2026, Analysis and Forecast to 2031

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## Abstracts

### Longarm Quilting Machine Market Summary

The textile machinery sector, specifically the segment dedicated to specialized crafting and small-scale production, is experiencing a period of sophisticated technological evolution. The Longarm Quilting Machine represents the pinnacle of this segment, distinct from standard domestic sewing machines due to its specific engineering designed to sew together the three layers of a quilt—the top, batting, and backing—while the fabric is held taut on a large frame. Historically, this process was performed by hand or on standard sewing machines, a laborious task limited by the small 'throat' space of domestic units. The longarm machine, with throat spaces typically ranging from 16 to 30 inches, allows the machine head to move freely over the fabric across X and Y axes, enabling continuous, expansive, and intricate stitching patterns.

The market for these machines is unique as it straddles the line between high-end consumer leisure equipment and industrial capital goods. The primary consumer base has shifted from purely industrial textile factories to a hybrid demographic of 'prosumers'—passionate hobbyists with dedicated studio space—and micro-entrepreneurs who provide quilting services for others. This shift is supported by the 'Quilting Renaissance,' driven by social media platforms where modern quilting aesthetics and techniques are shared globally, revitalizing an ancient craft into a vibrant, modern industry. The integration of computer-aided manufacturing (CAM) technology, known in this industry as 'robotics' or automated quilting systems, has further democratized professional-level results, allowing users to execute complex digital patterns with precision.

### Market Size and Growth Trajectory

Based on a comprehensive analysis of consumer discretionary spending on hobbyist machinery, import/export data of industrial sewing apparatus, and financial disclosures from diversified machinery conglomerates, the global Longarm Quilting Machine market is on a trajectory of steady, value-driven growth. The market valuation is projected to reach between 0.6 billion USD and 1.1 billion USD by the year 2026. This valuation includes the sales of the machine heads, the requisite frames (which are often sold separately or as a system), and the integrated computerized robotics systems.

To achieve this valuation, the market is estimated to progress at a Compound Annual Growth Rate (CAGR) ranging from 4.2% to 6.5% over the forecast period. This growth rate reflects a mature but evolving market. While the unit volume growth is moderate, the average selling price (ASP) is increasing due to the high attach rate of automation software and tablet-based control systems. The resilience of the crafting economy, even during economic downturns, supports the lower end of the growth estimate, while the expanding 'side hustle' economy, where individuals monetize their quilting skills, drives the upper end of the projection.

### Recent Industrial Developments and Strategic Acquisitions

The competitive landscape of the quilting industry has been marked by a trend toward ecosystem consolidation and the pursuit of higher speed and automation. Recent developments highlight the industry's focus on software integration and hardware performance.

Chronologically, the first significant movement occurred on February 3, 2025, when Oklahoma Embroidery Supply and Design (OESD) announced the acquisition of Designs in Machine Embroidery (DIME). While OESD is a giant in the embroidery space, this acquisition has profound implications for the quilting market. DIME is renowned for its advanced software, patented magnetic hoops, and innovative notions. The convergence of embroidery and quilting is a major trend, with many modern longarm machines featuring embroidery-like capabilities for applique and motif stitching. This strategic acquisition expands OESD's position as a one-stop destination for fiber artists. By integrating DIME's software capabilities, the parent company can offer a more seamless 'design-to-stitch' workflow, addressing a common pain point for quilters who often struggle with file format compatibility between design software and machine execution systems.

Following this consolidation in the software and accessory space, the hardware sector

witnessed a major flagship launch. On January 12, 2026, Handi Quilter, a dominant player in the prosumer space, launched the Infinity 28 with Pro-Stitcher Quilting System. This product release is significant as it sets a new benchmark for the 'high-end' segment of the market. The machine offers a massive 28-inch throat space, which is critical for handling king-sized quilts without frequent fabric adjustments. Furthermore, the machine boasts blazing speeds of up to 3,100 stitches per minute (SPM). This speed places it in direct competition with purely industrial machines, yet it is marketed to serious home quilters and production studios. The integration with the Pro-Stitcher system—a premier computerized quilting program—as a standard or highly recommended bundle signifies the market's move toward 'smart' quilting. This system is engineered for smooth, quiet, and effortless operation, directly addressing the ergonomic fatigue associated with manual free-motion quilting.

### Application Analysis and Market Segmentation

The utility of longarm quilting machines is segmented based on the intent of the user and the volume of production.

**Household:** This segment, often referred to as the 'Hobbyist' or 'Prosumer' market, represents a significant portion of the revenue, particularly in North America. These users are typically retirees or high-income individuals who dedicate substantial home space to quilting. The primary drivers for this segment are ease of use, educational support, and stitch quality. The trend here is the adoption of 'movable' or 'sit-down' longarm machines for those with space constraints, although the large-frame 'stand-up' models remain the aspirational standard. Automation is increasingly popular in this segment not for speed, but for the ability to achieve perfection in design execution without years of manual practice.

**Commercial:** This segment encompasses professional 'longarmers' who operate small businesses quilting quilt tops pieced by others. It also includes small-batch textile manufacturing and art studios. Reliability, speed, and durability are the paramount requirements. The trend in the commercial sector is the adoption of multi-head machines or the operation of multiple single-head machines by a single operator using networked automation software. Commercial users are also the primary consumers of 'Computerized Quilting' services, where custom digital patterns are purchased and executed to client specifications.

## Regional Market Distribution and Geographic Trends

The adoption of longarm quilting technology is heavily skewed toward regions with strong cultural ties to quilting and high disposable incomes.

**North America:** The United States and Canada constitute the largest and most mature market for longarm quilting machines. The tradition of quilting is deeply embedded in American culture, supported by a vast network of guilds, shows, and retailers. The market here is driven by the replacement cycle, as existing users upgrade to machines with better stitch regulation and automation. The trend is the expansion of dealer networks into smaller towns, providing local service and training which is essential for these complex machines.

**Europe:** The European market is growing, particularly in the United Kingdom, Germany, and the Netherlands, where there is a strong appreciation for textile arts. However, smaller average home sizes in Europe present a challenge for the large footprint of standard longarm frames. Consequently, there is a higher trend toward 'sit-down' longarm models and mid-arm machines that offer more throat space than a domestic machine but do not require a 12-foot frame.

**Asia Pacific:** This region plays a dual role as both a manufacturing hub and an emerging consumer market. Japan has a dedicated and highly skilled quilting community, favoring precision and compact high-performance machines. Manufacturers like Juki, Janome, and Brother leverage their industrial sewing heritage to serve this market. In Australia and New Zealand, the market mirrors the North American model, with a high prevalence of large-frame machines. The trend in Asian manufacturing hubs, including Taiwan, China, is the production of high-precision electronics and servo motors that power these machines.

## Value Chain Analysis

The value chain of the Longarm Quilting Machine market is a blend of heavy mechanical engineering and software development.

The Upstream segment involves suppliers of raw materials and core components. This includes precision-machined aluminum and steel for the machine heads and frames to ensure rigidity and vibration dampening. Critical components include high-speed servo motors, encoders for stitch regulation, and sophisticated printed circuit boards (PCBs)

for the user interface.

The Midstream segment consists of the Machine Manufacturers (OEMs). These companies design and assemble the units. A key value-add activity here is the development of 'Stitch Regulation' technology. This technology uses optical sensors to track the movement of the machine and adjust the motor speed in milliseconds to ensure consistent stitch length regardless of how fast the user moves the machine. This is the defining feature of a quality longarm machine.

The Downstream segment is dominated by the Dealer Network. Unlike standard sewing machines, longarm machines are rarely sold in big-box stores. They require specialized dealers who offer setup, installation, and ongoing maintenance. Education is a massive part of the value chain; manufacturers and dealers monetize training events, retreats, and online certification programs to teach users how to utilize the complex software and hardware.

### Key Market Players and Competitive Landscape

The competitive landscape is a mix of specialized longarm manufacturers and general sewing giants who have entered the niche.

**Handi Quilter:** A market leader in the consumer longarm space. Based in the US, they are known for their strong educational focus and widespread dealer network. Their machines, like the Amara and Infinity, are benchmarks for the industry.

**Gammill:** The heritage brand of the industry. Gammill machines are renowned for their industrial durability and retrofittable technology. Their 'Statler Stitcher' automation is a dominant name in the commercial sector.

**The Grace Company:** Originally a manufacturer of quilting frames, Grace expanded into manufacturing machine heads. They are known for providing high-value, cost-effective entry points into the longarm market, often partnering with other brands to supply frames.

**Bernina:** A premium Swiss brand. Their Q Series (Q20/Q24) brought high design aesthetics and Swiss engineering precision to the longarm market. They focus on the high-net-worth hobbyist who values interface design and stitch quality.

**Innova:** Known for their engineering-first approach. Innova machines are favored by commercial quilters for their lightning-fast acceleration and patented stitching mechanisms that reduce maintenance.

**Baby Lock:** A brand that focuses on ease of use. Their longarm machines are often manufactured in partnership with other OEMs but feature unique Baby Lock interface enhancements and are sold through their extensive dealer network.

**Janome:** A Japanese giant that offers robust, reliable longarm machines. They excel in the sit-down and mid-arm categories, offering high quality at competitive price points.

**Juki:** An industrial sewing powerhouse. Juki longarm machines are stripped-down workhorses. They are less focused on fancy touchscreens and more on mechanical reliability and stitch perfection, appealing to purists.

**Brother:** Similar to Baby Lock and Janome, Brother leverages its brand recognition in the domestic market to upsell users to their longarm offerings.

**King Quilter / PFAFF / Viking:** Other notable brands that occupy specific niches, often sharing manufacturing platforms but differentiating through software ecosystems and dealer support.

## Downstream Processing and Application Integration

The longarm machine is the center of a production ecosystem that involves several downstream integrations.

**Computer-Aided Design (CAD) Integration:** Professional longarm quilting relies heavily on vector-based digital designs (formats like .hqf, .qli, .dxf). Downstream integration involves users purchasing digital patterns online and loading them into the machine's tablet. The trend is toward cloud-based libraries where designs can be streamed directly to the machine.

**Frame Systems:** The machine is useless without a frame. Downstream processing involves the setup of precision tracks. Modern frames are modular, allowing users to expand from 8 feet to 12 feet as their space allows.

Innovations in 'auto-advance' frames are integrating motors to roll the quilt fabric automatically, reducing physical strain.

**Tension Control Systems:** Integration with digital tension gauges allows users to record and replicate the exact thread tension settings for different thread types (cotton, polyester, metallic), ensuring consistent quality across projects.

## Challenges and Opportunities

The market faces a unique set of macroeconomic challenges and growth opportunities.

An expanding opportunity lies in the 'Micro-Manufacturing' trend. As the 'gig economy' matures, more individuals are turning to quilting as a revenue stream. Manufacturers are responding by creating 'prosumer' financing packages and business-in-a-box solutions that include the machine, automation, and business training. Additionally, the integration of AI to assist in pattern placement and nesting can reduce fabric waste and improve efficiency for commercial users.

However, challenges are significant. The primary barrier is the 'Space and Cost' factor. A full-sized longarm setup requires a room-sized footprint and an investment comparable to a compact car. This limits the Total Addressable Market (TAM) to homeowners with extra space.

A critical and immediate challenge is the trade policy landscape, specifically the impact of tariffs imposed by the Trump administration. Longarm quilting machines are heavy, material-intensive products. The frames are constructed from high-grade steel and extruded aluminum.

The imposition of tariffs on imported steel and aluminum directly impacts the manufacturing costs for US-based assemblers like Gammill, Handi Quilter, and The Grace Company. While they manufacture in the US, they often source raw metals or specialized extrusions globally. Higher input costs force price increases on the final product.

More critically, the electronics—the 'brains' of the machine, including the tablet interfaces, servo controllers, and optical sensors—are predominantly sourced from the Asian electronics supply chain. Section 301 tariffs on Chinese electronics significantly inflate the cost of the automation systems (like Pro-Stitcher or AutoPilot).

For brands that import complete machine heads from manufacturing partners in Asia (such as Baby Lock or Janome), tariffs on finished industrial machinery could lead to substantial retail price hikes. In a discretionary hobbyist market, a 10-20% price increase can significantly cool demand, causing consumers to delay upgrades or opt for used equipment. This geopolitical friction forces manufacturers to consider supply chain diversification, potentially sourcing components from tariff-neutral regions, but the specialized nature of these parts makes rapid shifting difficult. Dealers may face thinner margins as they try to absorb some tariff costs to keep machines affordable for the average quilter.

## Contents

### **CHAPTER 1 EXECUTIVE SUMMARY**

### **CHAPTER 2 ABBREVIATION AND ACRONYMS**

### **CHAPTER 3 PREFACE**

- 3.1 Research Scope
- 3.2 Research Sources
  - 3.2.1 Data Sources
  - 3.2.2 Assumptions
- 3.3 Research Method

### **CHAPTER 4 MARKET LANDSCAPE**

- 4.1 Market Overview
- 4.2 Classification/Types
- 4.3 Application/End Users

### **CHAPTER 5 MARKET TREND ANALYSIS**

- 5.1 Introduction
- 5.2 Drivers
- 5.3 Restraints
- 5.4 Opportunities
- 5.5 Threats

### **CHAPTER 6 INDUSTRY CHAIN ANALYSIS**

- 6.1 Upstream/Suppliers Analysis
- 6.2 Longarm Quilting Machine Analysis
  - 6.2.1 Technology Analysis
  - 6.2.2 Cost Analysis
  - 6.2.3 Market Channel Analysis
- 6.3 Downstream Buyers/End Users

### **CHAPTER 7 LATEST MARKET DYNAMICS**

- 7.1 Latest News
- 7.2 Merger and Acquisition
- 7.3 Planned/Future Project
- 7.4 Policy Dynamics

## **CHAPTER 8 TRADING ANALYSIS**

- 8.1 Export of Longarm Quilting Machine by Region
- 8.2 Import of Longarm Quilting Machine by Region
- 8.3 Balance of Trade

## **CHAPTER 9 HISTORICAL AND FORECAST LONGARM QUILTING MACHINE MARKET IN NORTH AMERICA (2021-2031)**

- 9.1 Longarm Quilting Machine Market Size
- 9.2 Longarm Quilting Machine Demand by End Use
- 9.3 Competition by Players/Suppliers
- 9.4 Type Segmentation and Price
- 9.5 Key Countries Analysis
  - 9.5.1 United States
  - 9.5.2 Canada
  - 9.5.3 Mexico

## **CHAPTER 10 HISTORICAL AND FORECAST LONGARM QUILTING MACHINE MARKET IN SOUTH AMERICA (2021-2031)**

- 10.1 Longarm Quilting Machine Market Size
- 10.2 Longarm Quilting Machine Demand by End Use
- 10.3 Competition by Players/Suppliers
- 10.4 Type Segmentation and Price
- 10.5 Key Countries Analysis
  - 10.5.1 Brazil
  - 10.5.2 Argentina
  - 10.5.3 Chile
  - 10.5.4 Peru

## **CHAPTER 11 HISTORICAL AND FORECAST LONGARM QUILTING MACHINE MARKET IN ASIA & PACIFIC (2021-2031)**

- 11.1 Longarm Quilting Machine Market Size
- 11.2 Longarm Quilting Machine Demand by End Use
- 11.3 Competition by Players/Suppliers
- 11.4 Type Segmentation and Price
- 11.5 Key Countries Analysis
  - 11.5.1 China
  - 11.5.2 India
  - 11.5.3 Japan
  - 11.5.4 South Korea
  - 11.5.5 Southeast Asia
  - 11.5.6 Australia & New Zealand

## **CHAPTER 12 HISTORICAL AND FORECAST LONGARM QUILTING MACHINE MARKET IN EUROPE (2021-2031)**

- 12.1 Longarm Quilting Machine Market Size
- 12.2 Longarm Quilting Machine Demand by End Use
- 12.3 Competition by Players/Suppliers
- 12.4 Type Segmentation and Price
- 12.5 Key Countries Analysis
  - 12.5.1 Germany
  - 12.5.2 France
  - 12.5.3 United Kingdom
  - 12.5.4 Italy
  - 12.5.5 Spain
  - 12.5.6 Belgium
  - 12.5.7 Netherlands
  - 12.5.8 Austria
  - 12.5.9 Poland
  - 12.5.10 North Europe

## **CHAPTER 13 HISTORICAL AND FORECAST LONGARM QUILTING MACHINE MARKET IN MEA (2021-2031)**

- 13.1 Longarm Quilting Machine Market Size
- 13.2 Longarm Quilting Machine Demand by End Use
- 13.3 Competition by Players/Suppliers
- 13.4 Type Segmentation and Price
- 13.5 Key Countries Analysis

- 13.5.1 Egypt
- 13.5.2 Israel
- 13.5.3 South Africa
- 13.5.4 Gulf Cooperation Council Countries
- 13.5.5 Turkey

## **CHAPTER 14 SUMMARY FOR GLOBAL LONGARM QUILTING MACHINE MARKET (2021-2026)**

- 14.1 Longarm Quilting Machine Market Size
- 14.2 Longarm Quilting Machine Demand by End Use
- 14.3 Competition by Players/Suppliers
- 14.4 Type Segmentation and Price

## **CHAPTER 15 GLOBAL LONGARM QUILTING MACHINE MARKET FORECAST (2026-2031)**

- 15.1 Longarm Quilting Machine Market Size Forecast
- 15.2 Longarm Quilting Machine Demand Forecast
- 15.3 Competition by Players/Suppliers
- 15.4 Type Segmentation and Price Forecast

## **CHAPTER 16 ANALYSIS OF GLOBAL KEY VENDORS**

- 16.1 Baby Lock
  - 16.1.1 Company Profile
  - 16.1.2 Main Business and Longarm Quilting Machine Information
  - 16.1.3 SWOT Analysis of Baby Lock
  - 16.1.4 Baby Lock Longarm Quilting Machine Sales, Revenue, Price and Gross Margin (2021-2026)
- 16.2 Janome
  - 16.2.1 Company Profile
  - 16.2.2 Main Business and Longarm Quilting Machine Information
  - 16.2.3 SWOT Analysis of Janome
  - 16.2.4 Janome Longarm Quilting Machine Sales, Revenue, Price and Gross Margin (2021-2026)
- 16.3 Singer
  - 16.3.1 Company Profile
  - 16.3.2 Main Business and Longarm Quilting Machine Information

- 16.3.3 SWOT Analysis of Singer
- 16.3.4 Singer Longarm Quilting Machine Sales, Revenue, Price and Gross Margin (2021-2026)
- 16.4 BERNINA
  - 16.4.1 Company Profile
  - 16.4.2 Main Business and Longarm Quilting Machine Information
  - 16.4.3 SWOT Analysis of BERNINA
  - 16.4.4 BERNINA Longarm Quilting Machine Sales, Revenue, Price and Gross Margin (2021-2026)
- 16.5 Innova
  - 16.5.1 Company Profile
  - 16.5.2 Main Business and Longarm Quilting Machine Information
  - 16.5.3 SWOT Analysis of Innova
  - 16.5.4 Innova Longarm Quilting Machine Sales, Revenue, Price and Gross Margin (2021-2026)
- 16.6 Handi Quilter
  - 16.6.1 Company Profile
  - 16.6.2 Main Business and Longarm Quilting Machine Information
  - 16.6.3 SWOT Analysis of Handi Quilter
  - 16.6.4 Handi Quilter Longarm Quilting Machine Sales, Revenue, Price and Gross Margin (2021-2026)
- 16.7 Gammill
  - 16.7.1 Company Profile
  - 16.7.2 Main Business and Longarm Quilting Machine Information
  - 16.7.3 SWOT Analysis of Gammill
  - 16.7.4 Gammill Longarm Quilting Machine Sales, Revenue, Price and Gross Margin (2021-2026)

Please ask for sample pages for full companies list

## Tables & Figures

### TABLES AND FIGURES

Table Abbreviation and Acronyms List

Table Research Scope of Longarm Quilting Machine Report

Table Data Sources of Longarm Quilting Machine Report

Table Major Assumptions of Longarm Quilting Machine Report

Figure Market Size Estimated Method

Figure Major Forecasting Factors

Figure Longarm Quilting Machine Picture

Table Longarm Quilting Machine Classification

Table Longarm Quilting Machine Applications List

Table Drivers of Longarm Quilting Machine Market

Table Restraints of Longarm Quilting Machine Market

Table Opportunities of Longarm Quilting Machine Market

Table Threats of Longarm Quilting Machine Market

Table Raw Materials Suppliers List

Table Different Production Methods of Longarm Quilting Machine

Table Cost Structure Analysis of Longarm Quilting Machine

Table Key End Users List

Table Latest News of Longarm Quilting Machine Market

Table Merger and Acquisition List

Table Planned/Future Project of Longarm Quilting Machine Market

Table Policy of Longarm Quilting Machine Market

Table 2021-2031 Regional Export of Longarm Quilting Machine

Table 2021-2031 Regional Import of Longarm Quilting Machine

Table 2021-2031 Regional Trade Balance

Figure 2021-2031 Regional Trade Balance

Table 2021-2031 North America Longarm Quilting Machine Market Size and Market Volume List

Figure 2021-2031 North America Longarm Quilting Machine Market Size and CAGR

Figure 2021-2031 North America Longarm Quilting Machine Market Volume and CAGR

Table 2021-2031 North America Longarm Quilting Machine Demand List by Application

Table 2021-2026 North America Longarm Quilting Machine Key Players Sales List

Table 2021-2026 North America Longarm Quilting Machine Key Players Market Share List

Table 2021-2031 North America Longarm Quilting Machine Demand List by Type

Table 2021-2026 North America Longarm Quilting Machine Price List by Type

Table 2021-2031 United States Longarm Quilting Machine Market Size and Market

## Volume List

Table 2021-2031 United States Longarm Quilting Machine Import & Export List

Table 2021-2031 Canada Longarm Quilting Machine Market Size and Market Volume List

Table 2021-2031 Canada Longarm Quilting Machine Import & Export List

Table 2021-2031 Mexico Longarm Quilting Machine Market Size and Market Volume List

Table 2021-2031 Mexico Longarm Quilting Machine Import & Export List

Table 2021-2031 South America Longarm Quilting Machine Market Size and Market Volume List

Figure 2021-2031 South America Longarm Quilting Machine Market Size and CAGR

Figure 2021-2031 South America Longarm Quilting Machine Market Volume and CAGR

Table 2021-2031 South America Longarm Quilting Machine Demand List by Application

Table 2021-2026 South America Longarm Quilting Machine Key Players Sales List

Table 2021-2026 South America Longarm Quilting Machine Key Players Market Share List

Table 2021-2031 South America Longarm Quilting Machine Demand List by Type

Table 2021-2026 South America Longarm Quilting Machine Price List by Type

Table 2021-2031 Brazil Longarm Quilting Machine Market Size and Market Volume List

Table 2021-2031 Brazil Longarm Quilting Machine Import & Export List

Table 2021-2031 Argentina Longarm Quilting Machine Market Size and Market Volume List

Table 2021-2031 Argentina Longarm Quilting Machine Import & Export List

Table 2021-2031 Chile Longarm Quilting Machine Market Size and Market Volume List

Table 2021-2031 Chile Longarm Quilting Machine Import & Export List

Table 2021-2031 Peru Longarm Quilting Machine Market Size and Market Volume List

Table 2021-2031 Peru Longarm Quilting Machine Import & Export List

Table 2021-2031 Asia & Pacific Longarm Quilting Machine Market Size and Market Volume List

Figure 2021-2031 Asia & Pacific Longarm Quilting Machine Market Size and CAGR

Figure 2021-2031 Asia & Pacific Longarm Quilting Machine Market Volume and CAGR

Table 2021-2031 Asia & Pacific Longarm Quilting Machine Demand List by Application

Table 2021-2026 Asia & Pacific Longarm Quilting Machine Key Players Sales List

Table 2021-2026 Asia & Pacific Longarm Quilting Machine Key Players Market Share List

Table 2021-2031 Asia & Pacific Longarm Quilting Machine Demand List by Type

Table 2021-2026 Asia & Pacific Longarm Quilting Machine Price List by Type

Table 2021-2031 China Longarm Quilting Machine Market Size and Market Volume List

Table 2021-2031 China Longarm Quilting Machine Import & Export List

Table 2021-2031 India Longarm Quilting Machine Market Size and Market Volume List  
Table 2021-2031 India Longarm Quilting Machine Import & Export List  
Table 2021-2031 Japan Longarm Quilting Machine Market Size and Market Volume List  
Table 2021-2031 Japan Longarm Quilting Machine Import & Export List  
Table 2021-2031 South Korea Longarm Quilting Machine Market Size and Market Volume List  
Table 2021-2031 South Korea Longarm Quilting Machine Import & Export List  
Table 2021-2031 Southeast Asia Longarm Quilting Machine Market Size List  
Table 2021-2031 Southeast Asia Longarm Quilting Machine Market Volume List  
Table 2021-2031 Southeast Asia Longarm Quilting Machine Import List  
Table 2021-2031 Southeast Asia Longarm Quilting Machine Export List  
Table 2021-2031 Australia & New Zealand Longarm Quilting Machine Market Size and Market Volume List  
Table 2021-2031 Australia & New Zealand Longarm Quilting Machine Import & Export List  
Table 2021-2031 Europe Longarm Quilting Machine Market Size and Market Volume List  
Figure 2021-2031 Europe Longarm Quilting Machine Market Size and CAGR  
Figure 2021-2031 Europe Longarm Quilting Machine Market Volume and CAGR  
Table 2021-2031 Europe Longarm Quilting Machine Demand List by Application  
Table 2021-2026 Europe Longarm Quilting Machine Key Players Sales List  
Table 2021-2026 Europe Longarm Quilting Machine Key Players Market Share List  
Table 2021-2031 Europe Longarm Quilting Machine Demand List by Type  
Table 2021-2026 Europe Longarm Quilting Machine Price List by Type  
Table 2021-2031 Germany Longarm Quilting Machine Market Size and Market Volume List  
Table 2021-2031 Germany Longarm Quilting Machine Import & Export List  
Table 2021-2031 France Longarm Quilting Machine Market Size and Market Volume List  
Table 2021-2031 France Longarm Quilting Machine Import & Export List  
Table 2021-2031 United Kingdom Longarm Quilting Machine Market Size and Market Volume List  
Table 2021-2031 United Kingdom Longarm Quilting Machine Import & Export List  
Table 2021-2031 Italy Longarm Quilting Machine Market Size and Market Volume List  
Table 2021-2031 Italy Longarm Quilting Machine Import & Export List  
Table 2021-2031 Spain Longarm Quilting Machine Market Size and Market Volume List  
Table 2021-2031 Spain Longarm Quilting Machine Import & Export List  
Table 2021-2031 Belgium Longarm Quilting Machine Market Size and Market Volume List

- Table 2021-2031 Belgium Longarm Quilting Machine Import & Export List
- Table 2021-2031 Netherlands Longarm Quilting Machine Market Size and Market Volume List
- Table 2021-2031 Netherlands Longarm Quilting Machine Import & Export List
- Table 2021-2031 Austria Longarm Quilting Machine Market Size and Market Volume List
- Table 2021-2031 Austria Longarm Quilting Machine Import & Export List
- Table 2021-2031 Poland Longarm Quilting Machine Market Size and Market Volume List
- Table 2021-2031 Poland Longarm Quilting Machine Import & Export List
- Table 2021-2031 North Europe Longarm Quilting Machine Market Size and Market Volume List
- Table 2021-2031 North Europe Longarm Quilting Machine Import & Export List
- Table 2021-2031 MEA Longarm Quilting Machine Market Size and Market Volume List
- Figure 2021-2031 MEA Longarm Quilting Machine Market Size and CAGR
- Figure 2021-2031 MEA Longarm Quilting Machine Market Volume and CAGR
- Table 2021-2031 MEA Longarm Quilting Machine Demand List by Application
- Table 2021-2026 MEA Longarm Quilting Machine Key Players Sales List
- Table 2021-2026 MEA Longarm Quilting Machine Key Players Market Share List
- Table 2021-2031 MEA Longarm Quilting Machine Demand List by Type
- Table 2021-2026 MEA Longarm Quilting Machine Price List by Type
- Table 2021-2031 Egypt Longarm Quilting Machine Market Size and Market Volume List
- Table 2021-2031 Egypt Longarm Quilting Machine Import & Export List
- Table 2021-2031 Israel Longarm Quilting Machine Market Size and Market Volume List
- Table 2021-2031 Israel Longarm Quilting Machine Import & Export List
- Table 2021-2031 South Africa Longarm Quilting Machine Market Size and Market Volume List
- Table 2021-2031 South Africa Longarm Quilting Machine Import & Export List
- Table 2021-2031 Gulf Cooperation Council Countries Longarm Quilting Machine Market Size and Market Volume List
- Table 2021-2031 Gulf Cooperation Council Countries Longarm Quilting Machine Import & Export List
- Table 2021-2031 Turkey Longarm Quilting Machine Market Size and Market Volume List
- Table 2021-2031 Turkey Longarm Quilting Machine Import & Export List
- Table 2021-2026 Global Longarm Quilting Machine Market Size List by Region
- Table 2021-2026 Global Longarm Quilting Machine Market Size Share List by Region
- Table 2021-2026 Global Longarm Quilting Machine Market Volume List by Region
- Table 2021-2026 Global Longarm Quilting Machine Market Volume Share List by

## Region

Table 2021-2026 Global Longarm Quilting Machine Demand List by Application

Table 2021-2026 Global Longarm Quilting Machine Demand Market Share List by Application

Table 2021-2026 Global Longarm Quilting Machine Key Vendors Sales List

Table 2021-2026 Global Longarm Quilting Machine Key Vendors Sales Share List

Figure 2021-2026 Global Longarm Quilting Machine Market Volume and Growth Rate

Table 2021-2026 Global Longarm Quilting Machine Key Vendors Revenue List

Figure 2021-2026 Global Longarm Quilting Machine Market Size and Growth Rate

Table 2021-2026 Global Longarm Quilting Machine Key Vendors Revenue Share List

Table 2021-2026 Global Longarm Quilting Machine Demand List by Type

Table 2021-2026 Global Longarm Quilting Machine Demand Market Share List by Type

Table 2021-2026 Regional Longarm Quilting Machine Price List

Table 2026-2031 Global Longarm Quilting Machine Market Size List by Region

Table 2026-2031 Global Longarm Quilting Machine Market Size Share List by Region

Table 2026-2031 Global Longarm Quilting Machine Market Volume List by Region

Table 2026-2031 Global Longarm Quilting Machine Market Volume Share List by Region

Table 2026-2031 Global Longarm Quilting Machine Demand List by Application

Table 2026-2031 Global Longarm Quilting Machine Demand Market Share List by Application

Table 2026-2031 Global Longarm Quilting Machine Key Vendors Sales List

Table 2026-2031 Global Longarm Quilting Machine Key Vendors Sales Share List

Figure 2026-2031 Global Longarm Quilting Machine Market Volume and Growth Rate

Table 2026-2031 Global Longarm Quilting Machine Key Vendors Revenue List

Figure 2026-2031 Global Longarm Quilting Machine Market Size and Growth Rate

Table 2026-2031 Global Longarm Quilting Machine Key Vendors Revenue Share List

Table 2026-2031 Global Longarm Quilting Machine Demand List by Type

Table 2026-2031 Global Longarm Quilting Machine Demand Market Share List by Type

Table 2026-2031 Longarm Quilting Machine Regional Price List

Table Baby Lock Information

Table SWOT Analysis of Baby Lock

Table 2021-2026 Baby Lock Longarm Quilting Machine Sale Volume Price Cost Revenue

Figure 2021-2026 Baby Lock Longarm Quilting Machine Sale Volume and Growth Rate

Figure 2021-2026 Baby Lock Longarm Quilting Machine Market Share

Table Janome Information

Table SWOT Analysis of Janome

Table 2021-2026 Janome Longarm Quilting Machine Sale Volume Price Cost Revenue

Figure 2021-2026 Janome Longarm Quilting Machine Sale Volume and Growth Rate

Figure 2021-2026 Janome Longarm Quilting Machine Market Share

Table Singer Information

Table SWOT Analysis of Singer

Table 2021-2026 Singer Longarm Quilting Machine Sale Volume Price Cost Revenue

Figure 2021-2026 Singer Longarm Quilting Machine Sale Volume and Growth Rate

Figure 2021-2026 Singer Longarm Quilting Machine Market Share

Table BERNINA Information

Table SWOT Analysis of BERNINA

Table 2021-2026 BERNINA Longarm Quilting Machine Sale Volume Price Cost Revenue

Figure 2021-2026 BERNINA Longarm Quilting Machine Sale Volume and Growth Rate

Figure 2021-2026 BERNINA Longarm Quilting Machine Market Share

Table Innova Information

Table SWOT Analysis of Innova

Table 2021-2026 Innova Longarm Quilting Machine Sale Volume Price Cost Revenue

Figure 2021-2026 Innova Longarm Quilting Machine Sale Volume and Growth Rate

Figure 2021-2026 Innova Longarm Quilting Machine Market Share

Table Handi Quilter Information

Table SWOT Analysis of Handi Quilter

Table 2021-2026 Handi Quilter Longarm Quilting Machine Sale Volume Price Cost Revenue

Figure 2021-2026 Handi Quilter Longarm Quilting Machine Sale Volume and Growth Rate

Figure 2021-2026 Handi Quilter Longarm Quilting Machine Market Share

Table Gammill Information

Table SWOT Analysis of Gammill

Table 2021-2026 Gammill Longarm Quilting Machine Sale Volume Price Cost Revenue

Figure 2021-2026 Gammill Longarm Quilting Machine Sale Volume and Growth Rate

Figure 2021-2026 Gammill Longarm Quilting Machine Market Share

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