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The Tiles of India

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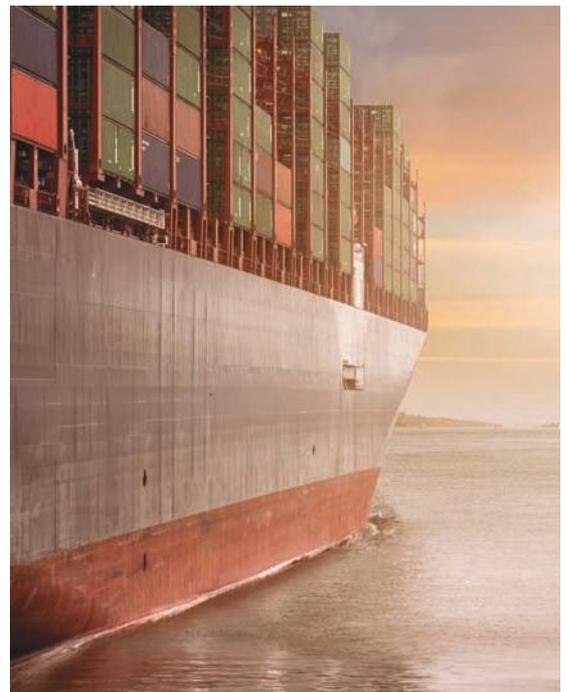
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Chetan Kajaria, Chairman, ICCTAS shares his views and outlook on how the industry is grappling with Covid19 and what measures can be taken to help it bounce back as normalcy returns gradually.



Chetan Kajaria,
Chairman, ICCTAS

Who knew what the year 2020 would have to offer to the world. In these hard times in Covid-19 pandemic, we can just hope and pray that all our colleagues, members and friends across the globe are safe and healthy and are with their loved ones.

India has opened up business activities in a phased manner which will help in moving the wheels of the economy.

India has become the world's fourth largest exporter with exports amounting to 30% of its total output. This growth has partly been driven by the ability to win market shares previously held by China in countries and regions that introduced antidumping duties on Chinese ceramic tiles (EU, Brazil, Taiwan, Chile, Vietnam and South Korea, amongst others). This in turn has been made possible by the continuous investments in technology made in the last five years in the Morbi district with the aim of modernizing factories, increasing production capacity and improving product quality, including that of the most innovative products such as large slabs, while maintaining the lowest production costs.

Today tiles and sanitaryware are no longer a luxury item. These are goods of basic need for maintaining hygiene and health.

For decades, the Ceramic Tiles and Sanitaryware industry has believed in the idea of creating a self-reliant India. Today, with our Honorable Prime Minister envisioning an India of the future which is 'Aatmnirbhar', we feel reinvigorated to take our indigenous products ahead. Our industry has always been inspired by his vision to support 'local'. That's why, all our products are made in India, made by the hands of our citizens. We have been taking our Desh ki Mitti ahead with full gusto. So much so, that today our industry can proudly be called the flag-bearer of the Aatm Nirbhar Bharat Abhiyan.

We hope that these goods which are taxed at the current rate of 18 percent be brought down to 12 percent. This will not only help the industry to grow much faster but make it more affordable for the people and will also help in fulfilling the government's programme of Housing For All by 2022.

Publisher's Note



The year 2020, saw the changing emergency in the world in its history due to Covid – 19 pandemic. The accelerated pace of change, and the sudden, unprecedented global emergency of 2020 has proved to be exceptional. The pandemic has affected the various regions of the planet at different times. Following lockdowns of various durations the world over, the ceramic tile and sanitaryware industry is gradually getting back to work. But many manufacturing activities are still at a standstill in number of major ceramic producer countries including India. While slowly everything is getting back to its normal phase, companies have been adapting the new normal and working towards accordingly.

This issue is an approach to give you the update about the current market scenario and how the Indian ceramic tile and sanitaryware brands are adapting the new normal and getting back to their normal operations. We have interviews of Indian ceramic tile manufactures-Simpolo ceramics, Asian Granito Ltd., and Orient Bell Ltd., talking about the impact of Covid -19 on the Indian ceramic tile and sanitaryware industry and real estate market and how they are running their operations currently and their plans for the coming months. Also, we have System Ceramics, leading ceramic tile technology brand, talking about their new high-performing technologies, and future of digital printing. Architect Rahul Manohar, gives a peek into interesting design elements in his latest project Main Auditorium in Mody University near Jaipur. We also have the complete figure of the world sanitaryware exporting and importing countries and its leading players.

Thank you.

Jignesh Trivedi, Publisher & Editor-in-Chief
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World sanitaryware exports and imports

Know about the world ceramic sanitaryware industry, its exporting and importing countries and leading players.

In the last issue of ICCTAS, we had featured the global tiles production and consumption data with all the countries top exporters, importers, manufacturers, consumption and big player's growth rate. We bring to you this time the World ceramic sanitaryware industry import/export rate. The World ceramic flows grew by 95.4% from 1.72 to 3.36 million tons over the period 2008-2018, corresponding to a

compound annual growth rate of 6.9%. In 2018 sanitaryware exports continued to rise with 9.4% growth on 2017, marking a positive trend in all geographical areas of production. Asia further consolidated its position as the largest world sanitaryware exporter with an increase in its share of world exports from 58% to 60% thanks to further strong growth in 2018 (2 million tons, +13.4%). This was largely due

to Chinese exports, although the other main Asian exporters (India, Thailand and Vietnam) also registered double-digit export growth. The European Union, the world's second largest exporter, closed 2018 with 2.7% growth to 593,000 tons thanks to the strong performance of Portugal, Germany and Poland, while Italian exports remained stable at 2017 values. Sanitaryware exports from North America

(NAFTA) were also up 2.3% to 375,000 tons, almost entirely from Mexico, while exports from South America rose 12% to 89,000 tons. In 2018, non-EU European countries continued their 8-year export expansion trend (+8.4% to 220,000 tons), driven by a further surge in Turkish exports (+9.6%). Finally, Africa remained stable at 2017 values with 66,000 tons.

Top Exporting Countries

A glance at the ten-year period as a whole provides a clear picture of how exports have evolved in each area and in particular reveals the exceptional growth of Asia, whose exports have risen

almost fourfold from 511,000 tons to 2 million tons (CAGR 2018/2008 +14.7%). Asia saw its percentage share of global exports rise from 29.7% in 2008 to the current figure of 60%, winning shares from all the

other regions. There were no major changes in the rankings of the top 10 exporter countries in 2018 with respect to the previous year, apart from India overtaking Turkey to reach third position and Germany

climbing above Poland to seventh. Eight out of the ten countries saw year-on-year growth in their sanitaryware exports, the only exceptions being Poland (-0.8%) and Italy (-3.8%).

THE TOP EXPORTING COUNTRIES												
	2008	2011	2012	2013	2014	2015	2016	2017	2018	% 18/17	CAGR 18/08	% on 2018 world exports
China	244,769	958,533	918,750	1,015,513	1,280,270	1,335,212	1,238,558	1,378,951	1,532,833	11.2%	20.1%	53.2%
Mexico	227,734	245,964	237,954	268,502	276,984	295,439	322,169	326,289	342,666	5.0%	4.2%	11.9%
India	82,511	90,611	118,226	134,255	119,626	119,752	135,776	137,717	182,691	32.7%	8.3%	6.3%
Turkey	101,195	101,350	113,445	119,602	125,256	120,613	127,065	140,759	154,285	9.6%	4.3%	5.4%
Portugal	85,538	65,552	67,251	68,525	78,360	87,434	93,891	94,164	101,654	8.0%	1.7%	3.5%
Thailand	71,949	58,712	56,976	68,107	75,794	79,242	81,016	86,512	96,067	11.0%	2.9%	3.3%
Germany	66,058	68,291	66,712	56,560	58,343	65,734	79,124	75,478	81,952	8.6%	2.2%	2.8%
Poland	85,167	70,342	66,723	70,890	69,913	77,048	80,323	76,620	78,617	2.6%	-0.8%	2.7%
Vietnam	21,415	24,570	32,088	42,750	57,424	47,892	50,064	63,864	73,809	15.6%	13.2%	2.6%
Italy	79,016	54,616	52,815	54,895	53,871	57,601	49,613	53,362	53,410	0.1%	-3.8%	1.9%
TOTAL WORLD	1,065,352	1,738,541	1,730,940	1,899,599	2,195,841	2,285,967	2,257,599	2,433,716	2,697,984			
% var y-o-y	61.9%	73.3%	72.9%	74.7%	76.0%	78.3%	77.5%	79.2%	80.2%			

Source: Ceramic World Review

Top Importing Countries

The 2018 rankings of the 10 largest sanitaryware importing countries remained almost unchanged with respect to the previous year, apart from a few variations in position and the entrance of Australia and Nigeria in place of Saudi

Arabia and Singapore. Eight of the ten countries saw their imports increase. Overall, the ten largest sanitaryware importers accounted for 53% of global sanitaryware imports (1.78 million tons).

THE TOP IMPORTING COUNTRIES												
	2008	2011	2012	2013	2014	2015	2016	2017	2018	% 18/17	CAGR 18/08	% on 2018 world imports
USA	388,393	495,986	508,466	585,081	624,259	683,754	690,580	738,913	811,635	9.8%	7.6%	24.1%
Germany	94,548	114,715	111,368	111,505	128,532	142,391	147,719	147,610	156,859	6.3%	5.2%	4.7%
Korea Rep.	19,534	105,416	94,980	99,658	115,816	132,361	148,344	143,662	146,027	1.6%	22.3%	4.3%
United Kingdom	93,288	108,143	108,352	116,765	138,337	147,323	145,992	151,904	138,019	9.1%	4.0%	4.1%
France	102,426	118,933	118,084	107,797	104,078	101,819	107,421	116,870	125,738	7.6%	2.1%	3.7%
Spain	104,912	84,827	70,252	70,745	82,755	88,245	93,758	89,036	108,096	21.4%	0.3%	3.2%
Canada	58,207	92,441	105,658	104,119	109,559	104,119	108,622	106,137	103,381	2.6%	5.9%	3.1%
Italy	44,971	61,577	52,204	51,925	53,181	55,328	61,716	63,316	66,428	4.9%	4.0%	2.0%
Australia	17,102	34,126	33,389	37,665	44,930	51,466	57,987	54,913	65,215	18.8%	14.3%	1.9%
Nigeria	11,272	40,744	46,309	50,765	61,460	59,144	40,579	48,514	57,134	17.8%	17.6%	1.7%
TOTAL	934.653	1.256.908	1.249.063	1.336.025	1.462.908	1.565.950	1.602.718	1.660.875	1.778.532			
% on total world imports	54.3%	53.0%	52.6%	52.6%	50.6%	53.6%	55.0%	54.0%	52.9%			

Source: Ceramic World Review

THE BIG PLAYERS IN THE SECTOR

To round off the international trade figures for the sanitaryware sector, we are presenting the key figures for the big players (large multinationals, groups or individual companies). Where available we also provide

the figures for turnover generated purely from sales of sanitaryware. This allows for a more uniform comparison between large groups which often operate in multiple segments. To provide a more complete picture of group

size, we also include total or consolidated turnover. The figures were supplied directly by the companies themselves or in some cases were based on estimates or obtained from public sources.

	Group	Country	Installed capacity (mill. Pcs.)	Production (mill. Pcs.)	Exports %	Total group turnover (mill. €)	Sanitaryware plants / Location	Main Brands / Companies
1	Roca Group	Spain	n.a.	35.4	80	1,800.0 (sanitaryware, tiles, distribution)	82 (total group). Sanitaryware plants in Spain (9), rest of Europe, South America, North Africa, Asia	Roca, Laufen, Celite, Incepa, Parryware, Jika, Ying, Santeri, Santek
2	Kohler Group	USA	22.0*	18.0*	n.a.	n.a.	12 in USA, Mexico, Brazil, France, Morocco, Thailand, India, China	Kohler, Jacob Delafon, Sterling, Ann Sacks
3	Geberit Group	Switzerland	14.0*	12.0*	n.a.	2.761,0	Sanitaryware plants in Finland, Sweden, Poland, Germany, Switzerland, France, Portugal, Italy, Ukraine	Kolo, Keramag, Ido, Ifo, Colombo, Koralle, Selles, Allia, Pozzi Ginori, Porsgrund, Sphinx
4	TOTO Ltd	Japan	n.a.	12.0	n.a.	4,703.0 (bathroom, tiles, other)	3 in Japan + 11 in China, Taiwan, Indonesia, India, Vietnam, Thailand, USA, Mexico	TOTO

	Group	Country	Installed capacity (mill. Pcs.)	Production (mill. Pcs.)	Exports %	Total group turnover (mill. €)	Sanitaryware plants / Location	Main Brands / Companies
5	Corona	Colombia	14.4	10.9	n.a.	477.5 (317.5 sanitaryware, 160 tiles)	2 in Colombia + 6 in Mexico, Guatemala, Nicaragua, USA	Corona, Mansfield, Incesa Standard, American Standard, Lamosa, Ecoline, Vortens
6	Lixil Corporation	Japan	10-12*	7-8*	n.a.	7,087.0 (sanitaryware & other businesses)	10 in Japan, China, Vietnam, Indonesia, Thailand, South Africa	American Standard, Lixil, Inax, Grohe, Jaxson
7	Duralex	Brazil	11.3*	n.a.	n.a.	1,025.0 (sanitaryware & other activities)	5 in Brazil	Deca
8	Cersanit	Poland	8	n.a.	68	n.a.	1 in Poland, 1 in Russia, 1 in Ukraine, 1 in Romania	Cersanit, Mito, Opoczno
9	Ideal Standard	Belgium	5.5*	5.5*	n.a.	666,1	1 in Italy, 1 in Czech Rep., 1 in Bulgaria, 1 in UK	Ideal Standard, Jado, Armitage Shanks, Dolomite
10	Lecico	Egypt	6.8	5.3	65	135.3 (79 sanitaryware, 49 tiles, 4.3 other)	3 in Egypt (incl. Tiles), 1 in Lebanon	Lecico
11	Eczacıbasi VitrA	Turkey	5.6	4.9	76	604.0 (157.0 sanitaryware, 242.0 tiles, 204.0 other activities)	1 in Turkey, 1 in Russia	VitrA
12	RAK Ceramics PJSC	UAE	5.0	4.6	35	641 (115 sanitaryware, 434 tiles, 92 other activities)	2 in UAE, 1 in India, 1 in Bangladesh	RAK
13	Duravit	Germany	n.a.	3.8	80	465	3 in Germany, 1 in France, 2 in Egypt, 1 in Turkey, 3 in China, 1 in Tunisia, 1 in India	Duravit
14	Cisa SA	Ecuador	4.5	3.5	30	103.0 (80.0 sanitaryware, 6.0 tiles, 17.0 other activities)	1 in Ecuador, 1 in Chile	Edesa, Briggs, Fanaloza
15	HSIL Limited	India	3.8	3.3	1	348.0 (102.0 sanitaryware, 246.0 other activities)	2 in India	Hindware, Benelave, Alchemy, Queo, Evok, Amore, Moonbow, Hindware Italian Collection, Rassi, H Vitreous, AGI
16	Cera Sanitaryware	India	3.3*	3.0*	n.a.	n.a.	1 in India	Cera
17	Creavit	Turkey	2.5	2.5	40	n.a.	2 in turkey	Creavit
18	Turkuaz Seramik	Turkey	3.0*	2.5*	n.a.	n.a.	2 in Turkey	Turkuaz, Cerastyle
19	Saudi Ceramics	Saudi Arabia	n.a.	2.5*	n.a.	242.3 (tiles, sanitaryware)	2 in Saudi Arabia	Saudi Ceramics
20	Trebol	Peru	3.0	2.4	18	44.6 (tiles, sanitaryware)	1 in Peru	Trebol, Barcelona, Ibero
21	Villeroy & Boch	Germany	3.5*	2.4*	n.a.	853.1 (584.3 sanitaryware, 266.2 tableware)	14 (total group) in Germany, Mexico, Thailand	Villeroy & Boch
22	Ferrum	Argentina	n.a.	2.4*	n.a.	89.9 (sanitaryware)	2 in Argentina	Ferrum
23	Siam Sanitary Ware	Thailand	2.6	2	22	88 (sanitaryware)	2 in Thailand	COTTO
24	Ceramic Industries	South Africa	2.3*	2.0*	n.a.	n.a.	2 in South Africa	Betta, Bettabath
25	Ceramica Cleopatra	Egypt	2.5*	2.0*	n.a.	n.a.	2 in Egypt	Cleopatra, Eldorado
26	Kirovskaya Keramika	Russia	2.0*	2.0*	n.a.	34,4	1 in Russia	Kirovskaya
27	Kale Group	Turkey	1.6	1.1	39	235.0 (18.2 sanitaryware, 190.0 tiles, 27.0 other activities)	1 in Turkey	Kale, Ida

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Challenges Ahead

Himanshu Jindal, Chief Financial Officer, Orient Bell Limited say's, that real estate and tile industry will face challenges due to Covid-19 even after removing 'No Construction Ban'.

Orient Bell Limited (OBL) was established in 1977, with its base in New Delhi. The company is widely respected in the industry circles as a trusted and professional manufacturer of wall and floor tiles. It has a chain of signature showrooms to display its complete product range and is privileged to be associated with the premier architects and builders of the country. It has in the recent past seen an influx of new

talent and leadership that's bringing a breath of fresh air in the building and construction industry. It's a player to watch out for.

The world is going through the pandemic and it has affected all sectors of the business. Talking about the real estate and the tile industry, the recent KPMG report stated that India's real estate sector is estimated to face losses of as much as Rs one lakh crore by





the end of the current financial year (2020-21) due to the COVID-19 pandemic. The pandemic will dampen real estate activity in the next six- twelve months and things are likely to look up only after eighteen – twenty four months.

With state resources focused on fighting Covid-19 and issue of labour availability, order

execution or receivable collections are likely to be impacted, adding to working capital pressure, said in a recent CRISIL report. Extended impact would hit construction primarily led by non- availability of people and lockdown.

According to Mr. Himanshu Jindal, Chief Financial Officer, Orient Bell Limited, Indians

are remarkably resilient and they will bounce back. However, this is the first time, in decades that demand has decreased. For the tile industry, 80% of production is domestic, including new construction and replacement demand. The construction activities have slowed down and are affecting the demand. Non-availability

of labour on construction sites too, may impact deliveries of ceramic products.

However, we are hearing stories of migrant labours returning. And if the government takes steps to improve and build customer confidence, the market is there.

www.orientbell.com

Newness in New Normal

Jitendra Aghara, CMD, Simpolo Group spoke exclusively with ICCTAS, about how the Covid 19 pandemic has impacted the overall business cycle and shared the brand's future plans.



Simpolo Ceramics has carved its niche as a consistently growing organisation with sheer innovation and passion rooted in simplicity. Headquartered in Morbi, Gujarat, India; they are spread all over the world. Simpolo ensures gratification for every experience that they offer, created to share something truly meaningful. Each system orientation drives the company to even more effective positioning of every work area. System-Oriented company works deeply with a sense of service mindset that gives huge mileage to reach out to the consumers. "We are 1100+ business



associates now and growing even stronger. We need to work closely with one another and

justify serving our customers with best of the offers with customized product range and designs," says Jitendra Aghara, CMD, Simpolo. "Simpolo is known for its innovation and newness in each component of tile designing: we wish to keep chasing newer horizons every day, which is what makes us unique amongst all," he added.

Do you feel that Covid-19 has impacted the overall business cycle and if yes, how and to what an extent?

Yes, keeping the present scenario in mind, it has really

affected the business at large. There had been a lot of liquidity crisis, almost zero movement for two months, no work, and no production. There had been challenges to keep the manpower retained, to take care of each of the employee was the top priority and to set up the sense of optimism among all.

The First Lockdown was a huge challenge in a way that nobody was aware about what was happening around. The nationwide call from the Hon. Prime Minister saying "JAAN HAI TO JAHAN HAI" was the only call that was to be taken at that moment of time.

The cycle was disturbed and almost stopped for zero output. The situation had been unimaginable, not in anybody's control, but we must move forward. To overcome this deep impact, we had to keep momentum by way of lot of churning processes, thought provoking exercises, idea exchange and keeping all our business associates connected for crafting the better future.

Seeing the results of the First Quarter we have met with 49% de-growth during the lockdown period. During the month of June this has reduced to only 4% de-growth. So, the market is opening, and things have started moving with good speed. Apart from the few containment zones across INDIA, the sign is looking very favourable and encouraging.

There had been impact in many ways. There is almost no development in Real Estate Sector seen, migration of labour and Fixed costs increased. These reasons have caused and impacted the industry at large.

What are the immediate measures you are planning to take once operations commence to boost or pull up business?

The first thing we started for moving ahead was to bridge the gap through the available material to get it liquidated. Since restarting the production is a tough task but we have begun the game. Keeping all the SOPs in implementation given by the Government of India.

The market is opening, people have started gaining confidence, the pace is good, but more momentum will catch up in a month or two. What we see today is around 70+% of sale on daily basis as how we see the dispatch. There have been a lot of projects stranded till now, they are opening. The economic stimulus has brought a little



hope and it will speed up in a month or two.

Keeping the exercise on run to keep our business associates connected to us we have worked upon many such issues that will boost up the sell and overall business. There will be pulling up business for sure. Not 100% of industrial houses started working, labours are not with all, they have migrated to their natives, this is affecting, but company like ours have retained the labour force, that is the key factor. Retention is a huge thing that has boosted their confidence. Every single employee is an asset to us and thus it was not that difficult

for us to plan out to restart operations.

A lot of webinars conducted to bring our business partners closer that includes both dealers and architects. We worked on liquidating the stock with both dealers and company. Employee retention was another exercise we took the charge of. We focussed on Collection that has been hampered a lot and much of the overdues have been collected. The business relations have worked to its deepest and in the most sensitized manner as how we are supported by our business associates.

The movements are seen at very good level now. Activities

across the facilities are moving faster. We are confident enough to see the future is very bright, though challenging. It is 100% operation now and things are taking its good shape. Feeling to be more applied then before.

What kind of products will see traction post lockdown according to you?

There will be a paradigm shift. The concept of space management, building design, and minimalism will have a new definition for luxury. The socialism will have a new definition, health and hygiene will be on top priority so how can we offer the product that



gives them all in one.

The sense of NEW NORMAL is developing; the attitude towards every parameter of living will have the new dimension. We shall have to catch this new dimension. How effectively we can reach out to the needs of customers that gives them ready to use material at best premium in the longer run.

The work manual will change, the space management will change, the home maker will offer new things that make it more sustainable in a way of offering the space to express and feel. These things were being vanishing from the practices, now will emerge and will boost the new demand. Industry will see this as a paradigm shift.

Simpolo is known for its innovation and newness in each component of tile designing;

does the brand have something new coming up soon?

Apart from the social demand, we are bringing new offers to the market by launching some of the most revolutionary concepts in tiling and kitchen tops. Range will be highly sophisticated and will be focussing on absolute designing beauty that will have a lasting effect. Posh and Saga Collection will change the entire scene in the market offering some of the most revolutionary surfaces. iM+ Technology, Towards A Better You

We have never been as precautious as we are now about our health and hygiene. We are battling every day to increase our immunity and keep ourselves fit. With the help of latest production system, 'Continua+', we are introducing an innovation that will help you to stay healthy!

'iM+ Technology' is our most exciting innovation yet. It helps the product surface repel any liquid. It does not allow unwanted and harmful living organisms to stay and/or grow. This water repellent and anti-bacterial surface created with 'iM+', requires the lowest maintaining efforts.

We believe and understand that there is no other place in the world, which is safer than your home. We have and we always will put in our efforts to keep your safe place better and safer.

How do you see the market shaping up in the coming two to three years and how does Simpolo plan to position itself in this growth?

Yes, there is a huge challenging sentiment across the market. That is going to play a huge role and we are ready to cross

all the hurdles. That is the only way through. In my opinion it is clearly seen that Indian market will take "W" shape in coming year. How? I shall explain.

Business is always there; the only fact is that it has been postponed for say 6 months or so. I can see that next 6 months will be for resettling the market. It will be for sure. How the market got affected during Demonetization, somewhere in the same manner it is affected. When I say, the business is postponed not vanished out that is what is going to happen. The requirement can never be vanished out, it is always there. The pandemic has created an effect on every stakeholder to postpone the demand.

All the held-up project will start working and that gap of demand will be bridged up a bit. By one year's time it will take a great spike and things will show the hike in demand and supply. We are largely focussing of Export to manage the growth. The Anti-China sentiments across the world are at its peak. Countries across the globe are catching this as an opportunity to work on more aggressive manner to reach out to the global demand.

Hoping to have things gets turned up, yet we are eyeing on global scenario and continuously working on NEWNESS in the industry with an agile mind aligning with NEW NORMAL to work with.

www.simpolo.net

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The Brand 360

Kamlesh Patel, Chairman and Managing Director and Mukesh Patel, Managing Director, Asian Granito India Ltd. share with ICCTAS their views about the brand's future growth plans, battling Covid-19, and the 'Vocal for Local' initiative.

"Tile Industry has now moved towards green and environment friendly concepts. Ceramic industry will continue to play an important role in the growth engine of the country and aim for global leadership in the industry and success of 'Make in India,'" says, Kamlesh Patel, Chairman and Managing Director and Mukesh Patel, Managing Director, Asian Granito India Ltd. This interview focusses on the brands current business cycle, the impact of



Covid-19 on the industry, future plans and their take on 'Vocal for Local' initiative.

How has this pandemic affected the overall business cycle and its impact on the Indian tile industry?

Kamlesh Patel: It is very difficult to quantify the impact of Covid 19 at this moment. But like every industry, tiles and sanitaryware sector too are likely to see a hit in the short term as the trade and business across the world is halted.

We do anticipate temporary hiccups due to COVID 19 in the short term, however, we are confident that with our focused growth strategy and support from all our stakeholders company will be able to bounce back on its growth path and shall achieve new heights. We at AGL are very confident that we shall overcome stronger post the crisis settles down.

What are your immediate plans once the operations are commenced?

KP: We are happy to share that company has started to function its operations smoothly in most part of the country and started normal course of operation across all its 10 plants, 13 offices and display center, head office with total staff of around 200 people have started to function normally on rotation basis.. Company's 260 showroom out of 300 plus showrooms across the country have opened up and





started its usual functioning. We aim to achieve optimum production capacity very soon.

Going forward company is focusing on increasing the sales and expedites collections to ensure smooth functioning of the business and ensure best possible use of the working capital. Together company looks to expand its market share considerably in the coming time in the tile industry. AGL has set a target of Rs.2,000crores revenue brand and expand its exclusive store network to 500 with an aim to become a preferred tile brand.

What do you have to say about the slogan ‘Vocal for Local’ introduced by our honorable Prime Minister. How do you see this and its effects in the near future?

Mukesh Patel: India ranks second in the world and produces 12.90% of global tiles output. In terms of consumption also India is the 3rd largest tiles

market and among the top five fastest-growing markets in the World. With export growth of 25% plus over the last couple of years India has achieved good share of the global trade with quality at par with global leaders.

The ceramic industry is dependent to an extent on China for few raw materials such as abrasives and coating materials in vitrified tile manufacturing. Abrasive are used in polishing and surface preparation functions, as well as intermediate cutting. For India, it's not easy to be self-dependent on such raw materials in the near future but sincere efforts from the government and the respective stakeholders can make a way for it. We are ready to procure the material from local sources to support ‘Vocal for Local’ if we can get assured supplies from the local market at competitive rates.

Ceramic industry have seen a transformation in the

last decade and recorded phenomenal growth in terms of capacity, technology advancement, product portfolio and its structure. The installed capacity has increased substantially on account of inherent advantages like an abundance of raw materials from indigenous sources, advanced infrastructure and low labour cost.

Tile Industry has now moved towards green and environment friendly. Ceramic industry will continue to play an important role in the growth engine of the country and aim for global leadership in the industry and success of ‘Make in India’.

Which kind of products will be more in demand post lockdown, according to you? Is AGL planning to launch some new collections and products? Would you like to share with us?

MP: Asian Granito offers wide range of products including,

GVT, ceramic floor, digital wall, vitrified, parking, porcelain, glazed vitrified, outdoor, engineered marble & Quartz, etc. Company has recently launched bathware range consisting of Taps and Sanitaryware. to provide ‘Complete Bathroom Solutions’ under Brand AGL and we are seeing demand across all segments.

In the current time, large format tiles are making a slow but impactful entry into the Indian market. Large format tiles are available in different sizes and come with lots of benefits. They come in very big sizes making the installation process very easy. For example, one single slab of 1200x 2400mm will replace 8 tiles of standard 600x 600mm size. They weigh at least 60% less than traditional and current Italian marble. Along with this, it adds to the simplicity of installation and transport of the slabs. Large format tiles will give a seamless feeling



which is very similar to natural Italian marble because of fewer joints. Considering the ongoing trend, AGL has launched big slab tiles just like Italian Marbles - AGL MarbleX. These tiles are specially designed with a strong appeal to broaden the architectural spaces of any dimension. Synonymous to original Italian Marble, GrestekMarbleX from Asian Granito India Ltd aims to create a style that is artistic yet natural. MarbleX is perfect fusion of colors & creation.

Premium flooring solution - Quartz has emerged as the latest trend for all kind of counter tops & wall surface and its demand is growing across the world on account of aesthetics, durability, strength, variety and less wastage or damage compared to natural Marble. Launched in 2012, AGL's quartz collection are available in more than 50 unique designs and thickness

of 15mm, 20mm and 30mm respectively. Counter tops and interiors (floor) in kitchen, malls, airports, high end hotels, and commercial space are the major application of Quartz. AGL also offers a wide variety of designs and textures within the engineered marble and quartz category. With class and finesse, these marbles are available in large format of 3025x1225 mm size are as per the latest trend in flooring.

How do you see the market shaping up in the coming two to three years and how does AGL plan to position itself in this growth?

KP: The tiles industry have seen a transformation in the last decade and recorded a phenomenal growth in terms of capacity, technology advancement, product portfolio and its structure. The installed capacity has increased substantially on account of inherent advan-

tages like abundance of raw materials from indigenous sources, advanced infrastructure and low labour cost. Tiles industry in India will be count around Rs 35,000 crore to Rs.40,000crore, 40% industry is organised and 60% is unorganised. India ranks second in the world and produces 12.90% of global output. Also India is the 3rd largest tiles market and among the top five fastest growing markets in the world. Ceramic tiles account for 60% of the total demand for tiles in India. The key drivers for ceramic tiles in India are the boom in real estate which accounts for nearly 70% of the total demand followed by retail IT & BPO sectors.

For the next phase of growth, Asian Granito India Ltd (AGIL) is focusing on, Asset light and Capital light business model, becoming a strong retail brand in the domestic as well as exports market and achieves a leadership position in key

business segments. We are also focusing on High-end products such as premium GVT Tiles, Quartz & Marbles, etc. To become a 'Complete Bathroom Solution Provider', AGL has ventured in Sanitaryware segment this year. We are aiming to become a strong retail brand with a focus on 50% sales from retail business and 500 showrooms.

We have a strong global footprint in more than 78 countries across the world. Our target is to expand our international reach to 120 plus countries and generate strong export revenue by FY 2020-21. We are confident that our foray into the Sanitaryware segment will translate into rewarding opportunities in the coming years. The company aims AGL Bathware to become Rs. 150-200 crorebrand in the next 4-5 years.

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- ▶ PAN India network of dealers and world-class showrooms for a magnificent experience
- ▶ Won Superbrand status 11 times in a row
- ▶ Products adhere to green building norms
- ▶ India's only tile company to win 'Asia's most promising brand award' in the premium tile category
- ▶ Surging ahead into sanitaryware & faucets under the brand name - Kerovit
- ▶ Forayed into plywood under the brand name - KajariaPly

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Kajaria



The new dawn of ceramic tile

System Ceramics is paving the way for new high-performing technologies that will shape the future of digital printing.

According to international economic statistics Ceramic Tile sector in India is currently the world's fastest growing sector in terms of annual growth rates and the second most populous country.

System Ceramics has a presence in India from several years. System India, the subsidiary of the Italian company, leader in the development and construction of innovative ceramic plants and machinery, is located in Ahmedabad and Morbi (Gujarat). The Indian branch caters to the numerous customers in the country that have adopted cutting-edge Italian technology with the aim of manufacturing products of high aesthetic and superior technical quality. The innovative solutions include the Lamgea plant, which uses mouldless technology to produce slabs and large tiles of various sizes and thicknesses with high degree of flexibility.

The technology of System Ceramics plays a key role in the sector also in the digital printing with Creadigit which is largely adopted by tile producers in order to obtain high-end surface decoration.

The achievement of such significant results demonstrates the fundamental importance of the synergy and support of the System India branch, which ensures





an efficient local service to the customers, thanks to its highly skilled staff.

Furthermore, the Italian company has recently launched Superfast, the unique mouldless press which is able to produce traditional tile sizes, starting from the 60, 80 and 90 cm module with thickness from 3 to 30 mm. Superfast guarantees a nominal productivity of about 20,000 sq.m. per day. From the point of view of industrial sustainability, Superfast

has made a fundamental contribution in the recovery of ceramic material coming from the pressing and cutting phase. The recovered material is dry ground directly at the side of the press, and is then suitably mixed and dosed in order to be introduced directly into the dosers of atomized coating material, and reused in production without having to pass to the spray dryer.

This recycling process is made possible by an unfired cutting system, which

allows for the slab to be cut after pressing and before introduction into the kiln.

Looking ahead System Ceramics is paving the way for new high-performing technologies that will shape the future of digital printing with the new state-of-the-art printer Creadigit Infinity for a collaborative ceramics industry.

System Ceramics is a pioneer in groundbreaking industrial processes, plants and machinery focused on

innovation and sustainability.

The company has the objective of offering the market technologies with increasingly flexible high level performances, able to satisfy the tile manufacturing sector that requires lean and rapid processes, capable of reducing production costs, and in favor of a ceramics production oriented towards customization and a just-in-time approach.

www.systemceramics.com

The Tomorrow TALK

Indian ceramic tile and sanitaryware industry current update and post Covid-19 scenario.

The world is going through the Covid-19 pandemic, while some parts of the world are gradually getting back to normal and some are still struggling to get back. The pandemic has affected all the business sectors in the last few months. We bring to you a post Covid-19 update about the world and Indian ceramic tile and sanitaryware industry countries, their import and export scenario, current image and future plans.

Post Covid-19 scenario on importing and exporting countries

Post Covid-19, there will be paradigm shift in the way the world looks at China as their choice for tile sourcing from Asian market due to hygiene & reliability factors. The majority of the tile importers across the globe will prefer to switch to the other sourcing destination like India, Vietnam, Malaysia and Bangladesh from the second half of CY 2020. India is being second largest tile producing and consuming market, India will be going to be the first choice for importing ceramic and porcelain tiles.

India is second largest tiles producer and consumer in the world

India has rich natural resourcing for ceramic raw materials, has world class manufacturing facilities and adhering to international tiles quality standards. **There is huge potential of foreign direct investment in India to make it as their tile manufacturing hub.** Indian has better hygienic food habits, vegetarian dominant, ethical & honest business



practices, people are young, skilled and hardworking. There are strong possibilities that **European & worlds' leading tiles brands will make sourcing tie-up, JVs and set**

up their tiles and Ceramics (sanitary-ware) manufacturing plants in India.

India produces all kind of ceramic & porcelain tiles of international standards. India has huge potential for replacing Chinese tiles imports

in terms of offering competitive price, world class quality, speedy delivery and more importantly reliability in all aspects of the business. Probably the best part will be Indian Tiles



manufacturers' ability to handle smaller quantities of each SKU where in China one has to offer higher volume per SKU.

There are chances that there will be **relaxation in anti-dumping duty imposed by various countries on Indian ceramic (tiles, sanitaryware, tableware, engineered quartz) and allied products** and there may be tough norms for Chinese imports to discourage the Chinese ceramic sourcing. Indian government has created congenial business environment for ease of doing business in last few years which can attract more global tile importers and the foreign direct investments in the Indian tiles industry.

Right from an aesthetic ceramic tile to toughest porcelain tiles, small tiles to large format slab tiles, India can cater any need of global tiles importers' demand.

Morbi, Gujarat, India, hub of



ceramic tile industry Gujarat based Morbi Ceramic Industry is a largest cluster of ceramic contributing more than 80% in the Indian tiles production. Morbi porcelain slab tiles producers are current exporting large format porcelain tile slabs to China apart from

rest of the world which is phenomenal. Indian tiles import from China also will be reduced which will be replaced by other Asian countries imported and resorting to domestic sourcing.

Despite the recent shutdown of Morbi units on account of COVID-19 breakout, the growing

exports would continue to offer a lease of life for Morbi units once the lockdown is lifted, said ICICI Securities in a recent report.

With the deferral of ADD on Indian ceramic tile exports to GCC countries and newer export markets - US, Indonesia and Thailand opening up, Morbi exports are expected to gain significant traction over the next 2-3 years.

This, along with the likely improvement in their cashflow situation and their likely competitive pricing in domestic space (on the back of expected decline in gas prices in the near term), would enable them to stay afloat even in these testing times," said Nehal Shah, research analyst of the company.

Endurance of Morbi players over the past one year amid muted demand and falling realisations, have deprived branded players in gaining substantial market share over them. Post the sudden outbreak of COVID-19, which is likely



to impact the demand for tiles further in India, Morbi's improving cashflow situation and its likely competitive pricing may keep the much anticipated market share gains for branded players still at bay, said the report.

The top branded players are expected to continue to sustain volume growth challenges over the next few quarters considering the current plant shutdown and expected muted

demand environment in the near term.

"Despite the expectations of fuel cost savings, EBITDA margins of these branded players are likely to get impacted due to operating deleverage and pricing headwinds amid heightened competitive intensity," said Shah. With the prevailing excess supply situation (GVT in particular) in the industry, prices are likely to come under

further pressure as well.

Vocal for Local initiative

India is slowly moving towards becoming a self-reliant nation with the new hashtag Vocal for Local. The initiative by honorable PM Narendra Modi is of making India a self-sufficient and self-reliant country. The voice for Make in India and Vocal for Local is already gearing lot of positivity amongst business buyer and is gradually

moving towards bringing in all business sectors in every category by supporting all the local brands. Indian is the second largest tile producer and consumer in the world, there is a great chance for India to become a number one manufacturing and exporting country in coming year by supporting local brands.

With inputs from various online sources

TOP CONSUMPTION COUNTRIES

COUNTRY	2014 (Sq.m Mill.)	2015 (Sq.m Mill.)	2016 (Sq.m Mill.)	2017 (Sq.m Mill.)	2018 (Sq.m Mill.)	% on 2018 world consumption	% var. 18/17
1. CHINA	4,894	4,885	5,475	5,498	4,840	37.8%	-12.0%
2. INDIA	756	763	785	760	750	5.9%	-1.3%
3. BRAZIL	853	816	706	708	702	5.5%	-0.8%
4. VIETNAM	310	400	412	580	542	4.2%	-6.6%
5. INDONESIA	407	357	369	336	450	3.5%	33.9%
6. USA	231	254	274	284	289	2.3%	1.8%
7. EGYPT	190	190	215	252	254	2.0%	0.8%
8. TURKEY	215	234	241	254	239	1.9%	-5.9%
9. MEXICO	197	218	235	242	236	1.8%	-2.5%
10. IRAN	280	190	169	170	230	1.8%	35.3%
TOTAL	8,333	8,307	8,881	9,084	8,532	66.6%	-6.1%
TOTAL WORLD	12,132	12,281	12,989	13,295	12,818	100.0%	-3.6%

Source: Ceramic World Review

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Auditorium Design

Architect Rahul Manohar has given all design elements in his latest project **Main Auditorium** in **Mody University** near **Jaipur**, which make it one-of-a-kind professional and institutional auditorium.



Architect Rahul Manohar is the founder of RMM Designs in Mumbai. He has the privilege and honour to have been mentored by the Late Master Architect Mr. Rustam B J Patell (Senior Partner with Patell Batliwala Manohar & Associates and Fellow of the Frank Lloyd Wright Foundation - USA). Architect Rahul Manohar also takes an active interest in Academia and has been a part of the visiting faculty for Architectural Design at Rachana



Sansad's Academy of Architecture at Mumbai since 2009.

His latest project the main auditorium complex located within the Mody University Campus at Lakshmanagarh near Jaipur is one-of-a-kind institutional auditorium. The client brief did not specify too many details besides the seating capacity of about 1000 and should be at par with professionalism. We were helped by the site allocated for this complex since it was close to the main entrance and

towards the southern end, hence practically the entire green campus of about 265 acres could be framed from the foyer areas.

The foyers were therefore planned as "glass boxes" with an effort to merge the inside and outside. The auditorium is designed in a "shoe-box" enclosure imparting excellent sight-lines and acoustics for every seat. It has a capacity of approx 1100 people. Raker Slab and Beam arrangement for stepped floor has been designed with a dual

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purpose and serves as the floor for receiving the chairs and also serves as a counter-weight to the 1st floor foyer slab on the outside. This allows us to have a column free & cantilevered 1st floor foyer slab.

Expansive Stage designed for enabling large theatrical performances, dramas, dance and music programs. Functionality further enhanced by having large height above the stage to facilitate flying scenery, motorised presentation & cinema screens and professional stage lighting solutions. State of the art Audio-video system planned for movie projection, panel discussions with audio-video presentation, cultural and educational programs. Surround sound speakers support the main array speakers for immersive acoustics. Elaborate back stage and side stage facilities provided including multiple dressing rooms, quick change rooms, truck docks,

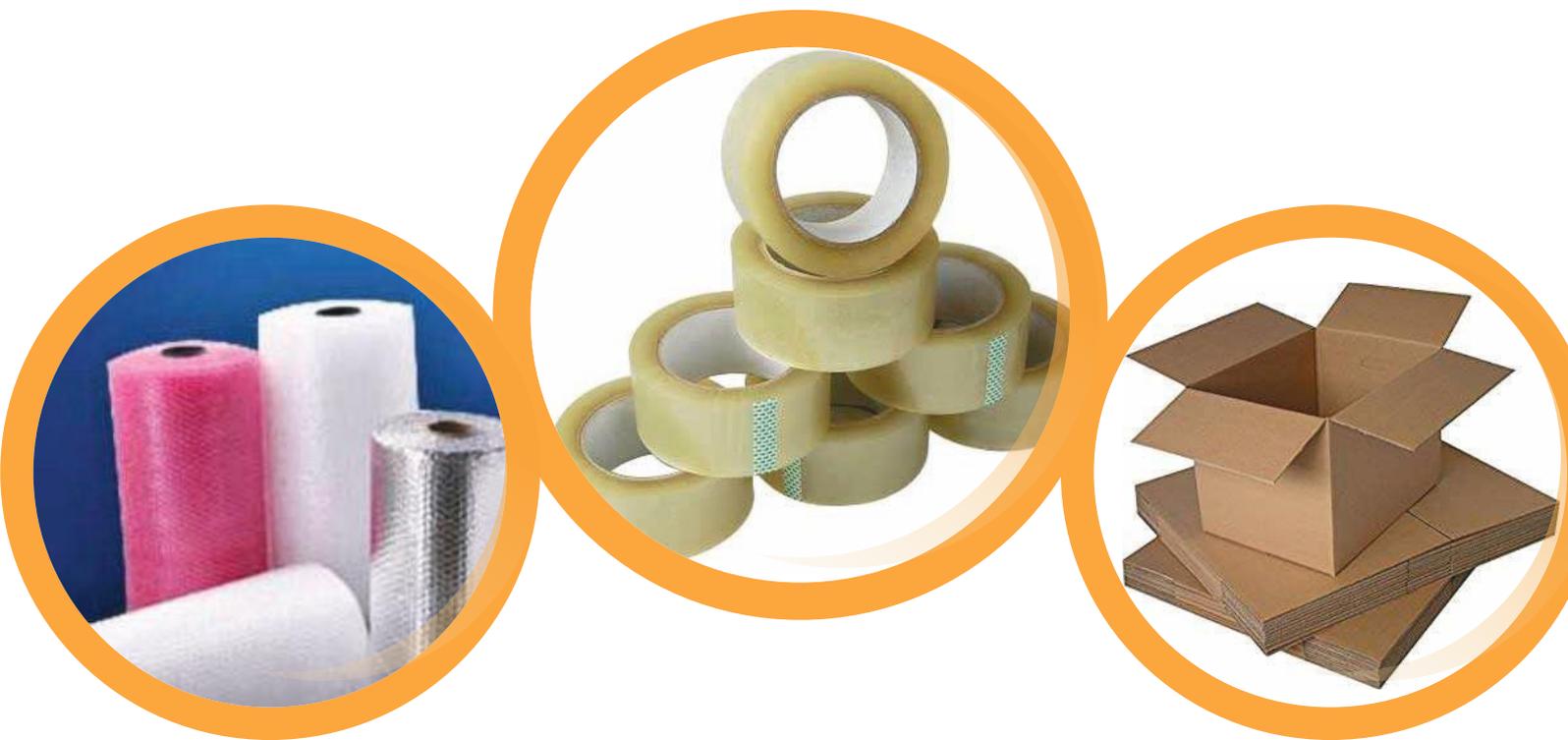
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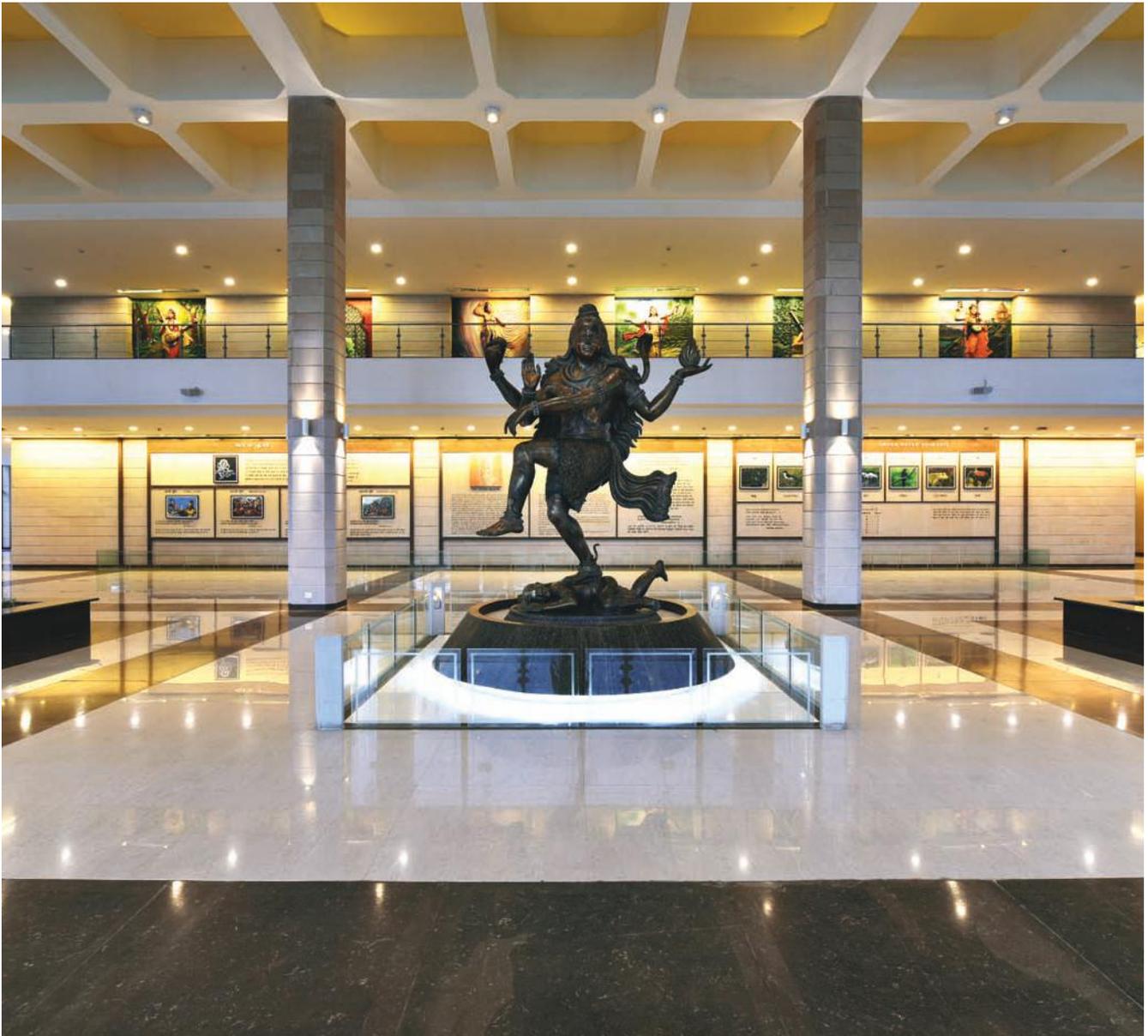


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scenery docks and other design elements usually associated with professional auditoriums. Grand Double-height Entrance Foyer with aesthetically designed scheme of sculptures, murals and paintings. Double storied glass facade separates the entrance foyer interiors with the green areas outside thus blurring the “inside-outside” line of separation.

The unique concept of “being one with nature” was adopted by having multiple planters within the entrance and side foyers. Foyers provided with maximum natural lighting via ample frame-less glazing and strategically located skylights.

Maximum glazing provided on the eastern and northern faces to restrict sun penetration during summers were used. Large roof overhangs provided for better weather shading for the glazing. Western façade planned with service areas like toilet blocks, staircases, etc thus helping in cutting-off the strong western sun penetration in the afternoons and early evenings. Foyers provided with skylights which are raised above the roof level allowing for louvers below the skylight. These louvers coupled with the louvers provided in the foyer glazing enable cross-ventilation and exhausting of hot air through

“stack effect”.

This is essential for keeping temperatures under check during the hot summers. All internal walls finished with stone cladding instead of a painted finish to facilitate easy maintenance and longevity. Interesting Ceiling design envisaged for the entrance foyer with a coffered ceiling with intermittent skylights. Foyer designed in a grid of 9.0 x 9.0m with Coffered Beams enabling a large volume supported on minimal columns. Combination of Dholpur and Red Agra Stone cladding used for external treatment to keep in sync with the existing structures.

However, individuality imparted by having a horizontal banded effect for the stonework. Service Areas designed with interesting external treatment of vertical fins in Dholpur stone which help camouflage the service piping, cables, ventilators, etc and also provide an elegant external façade. Entrance area accentuated with an interesting play of green areas, water-bodies, fountains & plantation of varying types and scale. Auditorium designed using the latest HVAC, Electrical and Emergency Services.

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Product Offerings

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Kajaria has launched Duratech XT Heavy Duty Outdoor Vitrified Tiles. It comes in 60 x 60cm / 12mm thicknesses, which can be safely used in all internal and external spaces that are exposed to high load and pedestrian traffic. They are a flawless blend of elegance and durability maintaining all the vital parameters such as surface hardness, water absorption, breaking strength, load bearing capacity etc. The application base of Duratech XT series is wider, and its every design is a true reflection of art. They are safely used on floor area like pedestrian traffic areas, vehicular movement areas, terraces, seatout areas, balcony, roof sunbathing areas, veranda, seaside, beach, swimming pools, sidewalk, airport, metros, train stations, industrial buildings, parking lots, underpasses, villa gardens, educational buildings etc.

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www.kajariaceramics.com

QUTONE

Qutone has introduced iMarble Full Body Stoneware tiles which is a blend of functionality and aesthetics Sintered Stoneware. This product offers stone like strength and durability while maintaining the grandeur of colours and aesthetic finish. This product is highly resilient to wear, unalterable due to weather and tough working condition. These tiles do not demand for extra care and maintenance. iMarble Full Body Stoneware smartly eliminates disadvantages of Granite, Quartz and other artificial stone and is safe and eco-friendly. These are available in various sizes 1000 x 3000 – 15mm and 1200 x 1200 – 9mm.

+91 79 4030 0075

www.qutoneceramic.com



SOMANY CERAMICS

Somany Ceramics has recently launched Glosstra Pro and Vistoso Pro. These are the biggest ceramic wall tiles in India with a size of 450 X 900mm. These are a generation next series of tiles with elegant punches and design inspired from the rich culture and heritage of Spain and Italy. Glosstra Pro is a great addition in the already existing Somany Glosstra Wall Tiles, which are renowned to be among the glossiest tiles in the industry. These tiles provide the users an option to adorn their walls with beautiful large format glossy tiles. Vistoso Pro tiles come in a satin matt finish and are available in a wide range of colours and designs.

0120-4627900

www.somanyceramics.com



RAK CERAMICS

RAK has introduced Coarstone collection, the next generation of technically superior, naturally inspired full body vitrified tile. This unique collection is aesthetically superior to its contemporaries and promises to fulfil the functional requirements of any intensive project design. The fine full body has been bolstered with immeasurable strength and has been specially designed to guarantee state – of – the – art technical characteristics. This collection comes in 16 stunning designs, seven in 600 x 600mm and five 600 x 1200mm, in 9.5mm thickness and an additional four stunning designs in 600 x 600mm in 16mm thickness. This range of tiles is sure to keep the magic of nature alive in your senses, in the way they look, the way they make you feel. And just when you thought you've admired their look and feel enough, you'll be pleasantly surprised to discover just how long – lasting they are. We especially recommended this tile – range for commercial as well as interior and exterior of residential spaces.

+91 22 62505100

www.rakceramics.com



ORIENT BELL

Orient Bell has introduced Timeless series catering new range of parking and outdoor tiles for eternal elegance. Keeping up with their aged charm, this rustic range is produced from their pioneering Sikandarabad plant. The series has been designed to serve for years to come. These classic pieces in stone and concrete finish come with a breaking strength upwards of 2000 and along with being acid and alkali resistant. Adding to this, the Timeless series is thermal shock resistant along with having water-absorbing properties. All of this has been incorporated to give an eternal elegance as guaranteed.

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www.orientbell.com

CLASSIC MARBLE COMPANY

CMC has introduced its latest products in KalingaStone marble – Melissa and in Terrazzo marble – the Hudson Sky. Designed for minimalist décor, the two products combine to create an elegant bathroom space. The mild colour tone of the Melissa installed in flooring and wall cladding suavely blends with the mosaic design of Hudson Sky installed for the vanity counter. The Melissa displays a grainy pattern across its plain white marble surface and the Hudson Sky, also a white slab, but with the bold terrazzo chips in shades of black, brown and grey. The two designs synergize to offer a calming atmosphere for a refreshing and energizing experience for the user. The products are suitable for a range of applications in the living, bed and bath areas in both residential and commercial spaces. Terrazzo has five collections and over 30 shades to choose from.

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CALYPSO CERAMIC PVT. LTD.

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COMMANDER VITRIFIED PVT. LTD.

Aalap Park Society, Plot No.67, Ravapar Road, Morbi – 363641, Gujarat

CORAL GOLD TILES PVT. LTD.

8-A, National Highway, Lakhdirpur Road, Morbi – 363 642 Gujarat

CORAL GRANITO PVT. LTD.

8-A, National Highway, Old Rfaleshwar Road, B/h. Lalpar Village, Morbi – 363 642 Gujarat

COSA CERAMICS PVT. LTD.

Nr. GSPL Gas Terminal, 8-A, National Highway, Lakhdirpur Road, Morbi - 363642, Gujarat

JAXX VITRIFIED PVT. LTD.

8-A, National Highway, Kandla Road, At.: Timbdi, Morbi – 363 642, Gujarat

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