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ICCTAS MAGAZINE



The Tiles of India

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INDIAN COUNCIL OF CERAMIC TILES AND SANITARYWARE





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Vijay Aggarwal, Chairman, ICCTAS, talks about the immense future opportunities and remarkable growth in the Indian ceramic tile and sanitaryware industry



Vijay Aggarwal
Chairman, ICCTAS

India is one of the fastest growing ceramic tiles and sanitaryware markets at the global level. It ranks as the world's second-largest producer and consumer of ceramic tiles. India's ceramic tiles industry is expected to double in size by 2027. India's export market size reached ₹16,500 crores in FY23, constituting 30% of the overall market and growing at a CAGR of approximately 15% from FY19 to FY23. Around 90% of tiles in India are manufactured in Morbi, Gujarat, and exported through the Mundra port. Of this, 80% is exported to the USA (60-70%), Saudi Arabia (20%), and the remaining 10% to the UAE thus creating a very large network of business.

The Indian ceramic tiles market has seen a tremendous resurgence post covid that has been driven by the expansion of the building industry, owing to the rapid expansion of the housing sector and increased construction spending across the globe. The ceramic tiles market is expected to expand because of this rapid urbanization and population growth.

The burgeoning real estate sector in India, fueled by increased urbanization and a rising middle class, represents the prime factor fueling the demand for tiles, sanitary wares, and bathroom fittings in the country. Besides this, favorable government initiatives promoting sanitation and expanding infrastructural development are creating a favorable outlook for market expansion. Moreover, there is an increased consumer awareness regarding hygiene and aesthetics, leading to a preference for quality and well-designed products. In addition to this, the easy availability of finance and globalization trends have made imported and premium products more accessible, aiding in market expansion. Furthermore, ongoing product advancements and innovation, such as the introduction of smart and sustainable products made from eco-friendly materials and designs, aligning with global sustainability goals, are presenting remunerative opportunities for market expansion.

The Government of India (GOI) has launched numerous initiatives to improve housing and sanitation, such as the Pradhan Mantri Awas Yojana (PMAY), the Swachh Bharat Mission, Housing for All, and Smart Cities Mission. These programs promote the construction of affordable housing and sanitation facilities, leading to an increased demand for tiles, sanitary ware, and bathroom fittings. The government plays a vital role in driving this market by incentivizing and funding these projects. Apart from this, India's economic growth, industrialization, and increasing consumer purchasing power all contribute to the market's expansion.

The competitive landscape of the Indian tiles, sanitary ware, and bathroom fittings market with a blend of organized and unorganized players striving to capture diverse consumer segments has served as a great impetus to business and innovation. Besides this, ongoing technological advancements have elevated the industry, introducing smart features and sustainable materials. Consequently, competition has extended to innovation and sustainability as brands strive to differentiate themselves in a crowded market.

The industry is showing great preparedness in all sectors and regions to identify their highest-value opportunities, address their most critical challenges, and transform their businesses and this signals some very good years in the future.

Publisher's Note



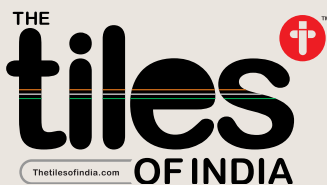
This is our last issue of 2023 and we bring to you all the latest news, product innovations and launches from various brands. We have an interview with Sudhanshu Pokhriyal, CEO Bath and Tiles business, Hindware Limited where he spoke about expansion of India's Ceramic Tile Sector and how it is transforming from functionality to fashion. There is a new product launch from System Ceramics -Manufacturing 4.0, which focuses on sustainability for an increasingly competitive 'Made In Italy'. Also, have a look at the H&R Johnson (India) latest collection "EVOKE SERIES" which is exquisite, sleek and a true example of modern design, crafted from the finest materials. Have a look at the world's top ceramic tile manufacturers.

We spoke to Ashhab Usmani and Shakeb Usmani, Directors of Shapzu Tiles, a leading manufacturer of handmade tiles about their passion led venture that pays homage to ancient tile building traditions. Cobotics, autonomous robotics, sensors and software are just a few of the latest innovations in the world of Automation. The leading brand Villeroy & Boch celebrated 275 years of unique design by showcasing their Hommage Collection in the new colour Pure Black! In architect's Take, we have featured 42MM Architecture's new project Levana Roof Top Restaurant in Lucknow, which pays homage to the Mughal and the French Architectural heritage of the city.

Happy Reading!



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Functionality to Fashion

Sudhanshu Pokhriyal, CEO Bath and Tiles business, Hindware Limited spoke with **ICCTAS**, about expansion of India's Ceramic Tile Sector and how it is transforming from functionality to fashion



As we stride confidently into the 21st century, it's remarkable how our homes have transformed, reflecting not only our changing lifestyles but also our evolving aesthetic sensibilities. Among the myriad shifts in interior design, flooring has revolutionised the field, fundamentally reshaping the industry.

According to IMF forecasts, the Indian economy is projected to grow by 6.1% this year and is expected to reach 6.8% in 2024, outperforming other nations in terms of dynamism. India is also experiencing the fastest social growth, which serves as a catalyst for significant growth in both public and private construction, infrastructure, and the consumption of building materials, including ceramic tiles. In addition to it, according to a report by Allied Market Research, in 2019, the market for tiles in India was valued at \$3,720.2 million and

the market is projected to experience significant growth, with an anticipated value of \$7,144.7 million by 2027.

Hindware Tiles entered the market just a few years ago and has since witnessed a remarkable transformation in the perception of flooring. In a short span of time, it has embraced this change, where flooring has evolved from mere functionality to a canvas for self-expression and a defining feature of modern interiors. Our journey has been marked by unwavering dedication to quality and innovation, and we are proud to be a part of this market that has undergone a remarkable metamorphosis.

The Evolution of Flooring: A Symphony of Style and Functionality

Not long ago, flooring was primarily utilitarian. Choices were limited to basic





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KEY HIGHLIGHTS:

Production Capacity: 44000 MT/ Annum
Raw Material: Soybean Husk and Mustard Husk
Size: 90 MM
Delivery: Pan India



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materials like wood, stone, and ceramic, with a limited variety of designs and colours. However, in today's design landscape, the possibilities are virtually endless. This is largely due to the emergence of innovative materials, patterns, and textures that allow homeowners to create spaces that are uniquely their own. One of the most significant contributors to this transformation is the world of ceramic & vitrified tiles. With advances in manufacturing technology, these tiles have evolved from basic, functional options into works of art. They can mimic the look of natural materials like marble, wood, stone or concrete with remarkable accuracy. The result is flooring that not only serves its practical purpose but also adds a touch of elegance and luxury to any room.

The evolution of flooring also embraces sustainability, reflecting the global shift towards responsible and environment friendly design. Modern consumers are increasingly conscious of their environmental footprint, and the flooring industry has responded accordingly. Manufacturers are committed to manufacturing eco-friendly options that incorporate recycled materials and reduce waste. The use of sustainable materials not only benefits the environment but also contributes to a healthier indoor living environment. Low-emission adhesives, non-toxic finishes, and materials that are easy to clean and maintain are now integral to modern flooring choices.

The Art of Flooring

Manufacturers in the flooring industry have undergone a significant transformation in response to shifting consumer preferences and the evolving perception of flooring as a valuable investment. Today, they are not just catering to functional needs but also placing a strong emphasis on aesthetics. The impact of flooring on a space extends beyond the visual appeal. It influences factors like room temperature, acoustics, and overall comfort. Manufacturers are recognising this and have introduced innovative flooring options with intricate textures and a rich colour palette, modern flooring solutions now have the potential to elevate the overall feel of a space. Moreover, the demand for durable and long-lasting flooring has driven manufacturers to focus on robust solutions that can withstand continuous use without compromising on quality.

From Comfort to Style: The Impact of Flooring Choices

The comfort of a space is intricately linked to its flooring. Durable and resilient, flooring is expected to maintain its superior quality even with constant use. It stands as a fundamental element of interior design, capable of either enhancing or diminishing the ambience of a space. Flooring has the power to transform a room's mood, infuse depth and character, and dictate its functionality. Therefore, careful consideration of factors such as



durability, maintenance, and design is essential when choosing the right flooring. Hindware Italian tiles exemplify this fusion of aesthetics and functionality, offering flooring solutions that seamlessly complement any interior design.

Flooring has evolved from being purely functional to a canvas for self-expression, influencing the aesthetics and functionality of our living spaces. As we look toward the future, the world of flooring is poised for even more exciting innovations, driven by technology and sustainability.

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Ever - Greener

Manufacturing 4.0: System Ceramics focuses on sustainability for an increasingly competitive 'Made In Italy'

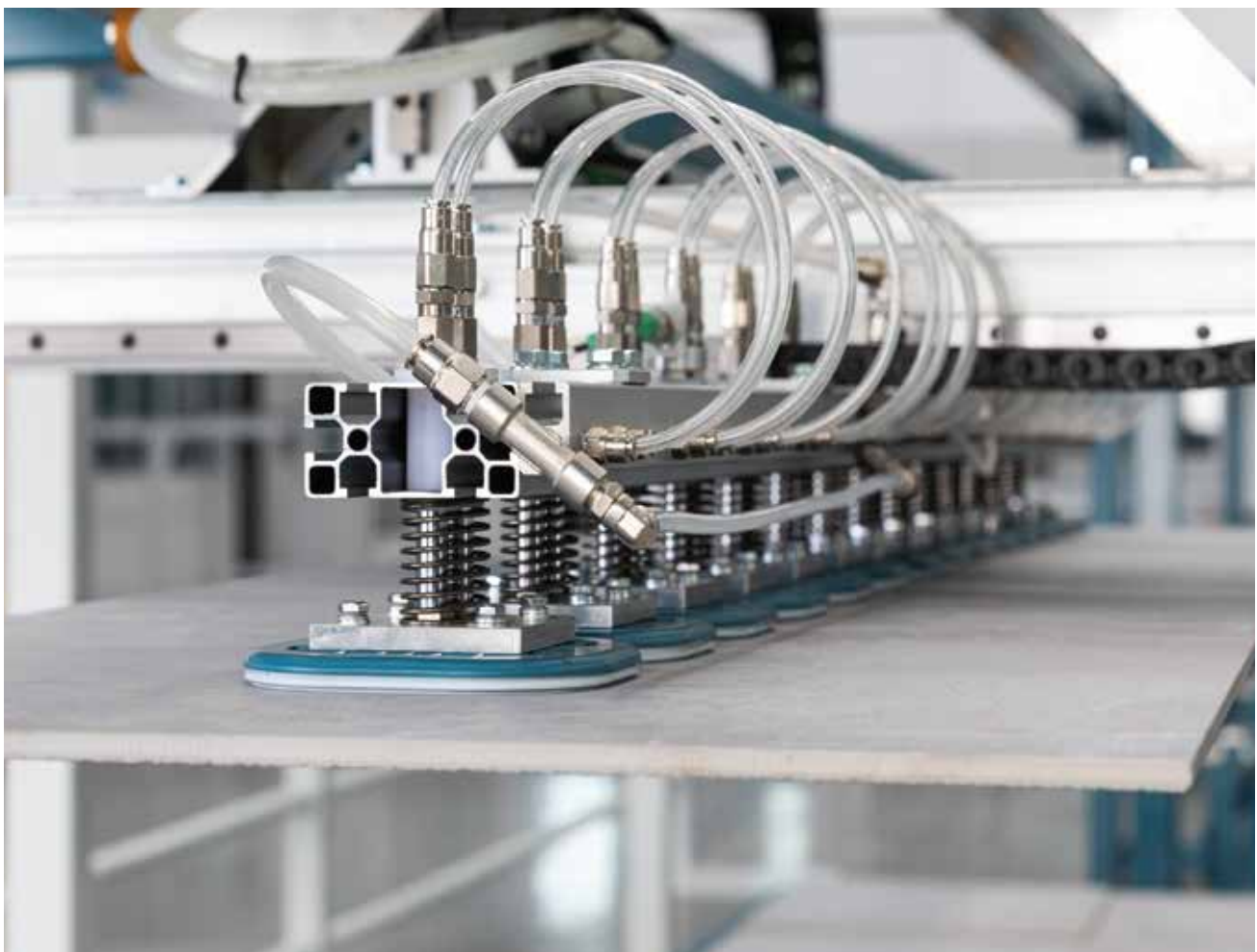
Industry 4.0 effectively represents the new frontier of the digital and sustainable transformation of the ceramics sector, a segment that drives the Italian economy with a turnover of 8.7 billion euros, today required to rapidly evolve without losing contact with tradition and the local territory. Thanks to the smart factory approach, System Ceramics, the Coesia company, is revolutionizing solutions for the market, offering enterprises the possibility of achieving a radical change in supply chain processes, making them ever-greener – from the way in which the company produces to how it distributes its products – counting on tools such as the Internet of Things (IoT), artificial intelligence and Machine Learning.

It's a major breakthrough for 'Made In Italy', with roots in the traditional manufacturing industry. System Ceramics has proved to be resilient and competitive with these solutions. Thanks to this solidity, in fact, it has been able to strengthen its historic partnerships with reference global operators such as ABK, Porcelanosa, Portobello, Kale Group and many others.

“Sustainability and innovation have become essential factors for doing business – **declared Luca Bazzani, CEO of System Ceramics and Vice President of ACIMAC (Italian Association of Manufacturers of Machinery and Equipment for**

Ceramics). Businesses have an increasingly important role to play in the transition towards a new economic system and this requires a cultural and structural change in order to obtain effective solutions that safeguard the environment without sacrificing growth objectives. System Ceramics is working on an ad-hoc sustainability plan, aimed at a structural reduction in CO2 emissions and at the optimization of water and energy resources, making our companies and the final products produced with our machines ever-greener”.

In line with Coesia's green strategy, since 2022 System Ceramics has introduced a Supply Chain structure to invest in





careful monitoring of the production chain in terms of energy efficiency and sustainability. The objective is to work with predominantly local certified suppliers, giving customers the possibility to improve, for their part, the sustainability of their final choice.

System Ceramics is making a significant contribution to the ceramics production sector through the research and

development of technologies that aim at making the industry increasingly sustainable throughout the ceramic production process: from pressing to decoration, from control to packaging. The Superfast ceramic press, which offers a 70% energy saving, Creadigit Infinity, the digital decoration technology which operates with a water-based ink printing technology, thereby improving the work environment and reducing emissions, and

Digiglaze, the digital glazing machine that reduces consumption and waste by up to 30%, together with 90% of the water required for maintenance, are examples. Then, there is the Genesis project, which is able to reproduce marbles and natural stones in a sustainable manner; and finally, 4.0 management software, such as Hypermate, implemented to optimize the production flow and improve the overall efficiency of a company.

In addition, with a view to minimizing the environmental impact of activities, through new investments, today 30% of the energy in System Ceramics' production sites is generated with photovoltaic plant, and self-generated consumption is planned to arrive at 80%. 500 MWh per year have been saved from the shift from traditional lights to LED lights and, at the same time, the water saving program in progress has enabled a 75% reduction in the use of water compared to last year and more than 7,520kg of water have been recycled for internal use in our plant.

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The Big Players

Have a look at the world's top ceramic tile manufacturers

As the year 2023 is about to end, let's have a look at the World's top ceramic tile players who managed to make it to the top list. The figures were mostly provided directly by the companies themselves, apart from a small number of cases in which they were obtained from public sources or estimated. The revenue figures were provided by the companies either directly in euros or in local currency and converted at the exchange rate as of 31/12/2022.

The most striking aspect of the 2022 results reported by the world's top 25 ceramic groups is without doubt the significant increase in revenues recorded by almost all the players, including double-digit and in several cases more than 20% rises.

In general, all the companies offset their higher production costs by raising their prices and promoting higher-value products. The large groups recorded a less consistent performance in terms of output volumes, with only a minority

reporting growth and two thirds experiencing contraction or remaining at the same level as in 2021. The US group Mohawk Industries remains firmly at the top of the ranking, its position further strengthened by the acquisitions of Mexican company Vitromex (on 3 June 2022) and Brazilian firm Elizabeth (in November 2022), which have increased its installed capacity to over 300 million sqm. The Global Ceramics division posted a 10% increase in revenue to US \$4.3 billion in 2022, and succeeded in remaining stable in the first half of 2023 (US \$2.2 billion) compared to the same period in 2022. Mexico's Grupo Lamosa consolidated its second place with an increase in production to 215 million sqm as a result of the complete integration of Roca Tiles and Fanosa, acquired in September 2021 and January 2022 respectively. These operations were also responsible for the sharp increase in revenues in 2022 (+22% in the tile division alone to €1.27 billion). The Thai multinational SCG Ceramics also maintained its position in the top

three with an increase in production to 152 million sqm, while installed capacity remained unchanged relative to 2021. Tile segment revenues increased by 24% to €667 million.

RAK Ceramics climbed to fourth place in the industry ranking with an increase in production capacity to 130 million sqm and an output of 105 million sqm, while its tile division posted 18% revenue growth compared to 2021 (€550 million). Following close behind, Pamesa reported a stable output at 101 million sqm and an increase in total sales to 130 million sqm.

Tile segment revenue climbed to €1,186 million, marking the largest increase of any player in the Top 25 (+35% over 2021). Looking through the ranking, some of the other groups that posted an increase in capacity and/or production in 2022 include Kajaria Ceramics, STN Group (capacity reaching 100 million sqm and revenue up 29% compared to 2021) and Somany Ceramics (10 million sqm of additional capacity).



	Group / Company	Production (mill. sq.m)	Installed capacity	Export share	Turnover only tile segment (mill. €) ¹	Total turnover (mill. €)	Tile plants / Location	Main Tile Brands / Companies
1	MOHAWK INDUSTRIES, INC. USA	300.0 (estimates)	>300.0 (estimates)	n.a.	4,038.7 (\$ 4.3 bn)	11,004 (\$11.7 bn) (ceramics, carpet, laminate, wood, stone, LVT)	28 in USA, Mexico, Brazil, Italy, Spain, Poland, Bulgaria, Russia	American Olean, Dal Tile, KAI, Kerama Marazzi, Marazzi, Ragno, Emilgroup, Eliane, Vitromex, Elizabeth
2	GRUPO LAMOSA MEXICO	215.3	240.0	46%	1,272.7	1,700 (tiles, adhesives)	9 in Mexico, 2 in Argentina, 2 in Colombia, 3 in Peru, 3 in Brazil, 1 in Spain	Lamosa, Porcelanite, Firenze, San Lorenzo, Cordillera, Scop, Princesa, Mallorca, Lamosa USA, Euroceramica, Gala, Roca, Incepa, USCT
3	SCG CERAMICS THAILAND	152.0 (163.0 sales)	187.0	17%	667.0	806.0 (tiles + sanitaryware)	17 in Thailand, 6 in Vietnam, 1 in Indonesia, 1 in Philippines	COTTO, Sosuco, Campana, Prime, Mariwasa, Kia, Trend, Impreso
4	RAK CERAMICS UAE	105.0	130.0	60%	550.0	910.0 (tiles, sanitary, tableware)	12 in UAE, 1 in Bangladesh, 1 in India	RAK Ceramics, Elie Saab
5	GRUPO PAMESA SPAIN	101.0 (130.0 sales)	102.0	69	1,186.0	1,508.0 (tiles, raw materials, energy)	5 in Spain	Pamesa, TAU, Geotiles, Prissmacer, Ecoceramic, Navarti
6	CERAMICA CARMELO FIOR BRAZIL	97.2	98.4	26%	n.a.	n.a.	5 in Brazil	Cecafi, Pisoforte, Fioranno, Ideale, Arielle
7	STN GROUP SPAIN	85.7	100.0	76%	585.3	585.3	3 in Spain	STN, Alaplana, Keratile, Tesany, Vitacer, KTL
8	KAJARIA CERAMICS ² INDIA	80.0 (101.0 sales)	84.2	2%	463.0	501.0 (tiles, sanitaryware)	9 in India	Kajaria
9	ARWANA CITRAMULIA INDONESIA	70.6	71.7	1%	160.4	160.4	5 in Indonesia	Arwana
10	GRUPO CEDASA BRAZIL	67.0 (estimates)	70.0 (estimates)	n.a.	n.a.	n.a.	1 in Brazil	Cedasa, Majopar, Vistabella, Lorenza
11	GRUPO FRAGNANI BRAZIL	64.8	82.3	5%	218.3	218.3	3 in Brazil	Incefra, Incenor, Tecnogres, In Out, HD-Max., UP, Concept
12	SOMANY CERAMICS ² INDIA	62.0 (64.0 sales)	73.0	n.a.	n.a.	278.8 (tiles, sanitaryware)	11 in India	Somany
13	SAUDI CERAMICS SAUDI ARABIA	60.0 (estimates)	70.0 (estimates)	10%	n.a.	371.3 (tiles, sanitaryware, bricks)	6 in Saudi Arabia	Saudi Ceramics
14	VICTORIA PLC ² GREAT BRITAIN	53.8	61.0	n.a.	520.0 (GBP 453.3 mln)	1,661.0 (GBP 1.46 bn) (ceramic tiles, carpet, LVT, ...)	3 in Spain, 6 in Italy, 1 in Turkey	Keraben, Saloni, Ibero-Casainfinita, Serra, Ascot, Dom, Mac3, Keradom, Ceramiche Colli, Capri-Santa Maria, Graniser
15	DYNASTY CERAMIC THAILAND	50.5	82.0	4%	230.0	232.0	3 in Thailand	Dynasty, Tile Top, Jaguar, RCI, Chicken, Birdy, Swan
16	LASSELSBERGER GROUP AUSTRIA	47.6	51.9	n.a.	n.a.	n.a.	5 in Czech Rep., 2 in Hungary, 1 in Romania, 1 in Russia	Rako, Cesarom, LB-Ceramics, Zalakeramia
17	KALE GROUP TURKEY	45.7	56.0	30%	249.3	302.0 (tiles, bathroom, others)	14 in Turkey	Canakkale Seramik, Kalebodur, Edilcuoghi, Edilgres
18	CERAMIC INDUSTRIES SOUTH AFRICA	45.1	45.1	13%	203.0	249.1 (tiles, sanitaryware)	5 in South Africa, 1 in Australia	Samca, Vitro, Pegasus, Gryphon, Centaurus
19	VIGLACERA VIETNAM	45.0	47.0	20%	157.0	212.0 (tiles, sanitaryware)	7 in Vietnam, 1 in Cuba	Viglacera, Eurotile, United Tiles, Vasta Stone
20	INTERCERAMIC MEXICO	44.0	48.0	24%	484.0	666.0 (tiles, sanitaryware, others)	5 in Mexico, 1 in USA	Interceramic
21	H&R JOHNSON (INDIA) ² INDIA	43.6 (56.0 sales)	62.7	7%	221.4	275.3 (tiles, sanitaryware)	12 in India	Johnson, Marbonite, Endura, Porselano
22	CELIMA (Trebol Group) PERU	42.6	44.2	34%	180.6	180.6	3 in Peru	Celima
23	GRUPO HALCON SPAIN	42.0	50.0	76%	250.0	250.0	6 in Spain	Halcon, Cicogres, Emotion
24	PORTOBELLO (PGB) BRAZIL	40-42 (estimates)	46.0 (estimates)	n.a.	389.0	389.0	2 in Brazil	Portobello, Pointer
25	ORGANIZACION CORONA COLOMBIA	38.0	42.0	6%	170.0	473.0 (tiles, sanitaryware)	5 in Colombia	Corona, Orchid

Exquisite Evoke

H&R Johnson (India) – Johnson Endura’s latest collection **“EVOKE SERIES”** is exquisite, sleek and a true example of modern design, crafted from the finest materials

Established in 1958, H & R Johnson (India) is the pioneer of ceramic tiles in India. For over six decades, the brand has added various product categories to offer complete solutions to its customers of Tiles, Sanitaryware, Bath Fittings, and Engineered Marble & Quartz. All tiles products are sold under four strong brands, viz. Johnson Tiles, Marbonite,

Porselano and Endura. Currently in tiles, the brand has a capacity of over 64 million sq.m per annum spanning 13 manufacturing plants across the country which is one of the largest manufacturing capacities in India.

Johnson Endura’s latest collection “EVOKE SERIES” the exquisite collection

of sleek and modern designs, crafted from the finest materials and designed with meticulous attention to detail, transforms any room into a masterpiece and elevates the spaces to new heights.

Evoke Tiles has evolved into a versatile medium that isn’t just flooring or wall coverings; they’re expressions of style,



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FLOSPERSE 4013
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FLOSPERSE 4000B
FLOSPERSE 40132
FLOSPERSE 4030

SNF ORGNIC BINDER

ADD ONS :

- Enhance green MOR and Dry MOR
- Prevent cracks on body
- Decreases the possibility of tiles break
- Eliminate the use of Biocide.
- No Adverse effect on Rheological properties
- Reduces the use of expensive high plasticity clay

GRADES :

FLOBIND 1510

SNF FLOCCULANTS/COAGULANT FOR ETP

ADD ONS :

- Clear O/F in low dosages
- Big flocs generation &Faster settling rate
- Increase cake thickness & filtrate clarity
- Coagulants replaces alum @1:5 Approx
- SNF coagulants Even works better for GVT

GRADES :

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FL 910/ FL 923

Coagulants :
FL 4520/ FL 3249

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elegance, and innovation in indoor and outdoor spaces worldwide. Geometric motifs, terrazzo, and floral patterns adorn the tile surfaces, providing a diversity of aesthetics, and making it the perfect choice for a variety of spaces.

Whether you desire the timeless charm of natural stone, the contemporary allure of terrazzo, or the bold and intricate creativity of mosaic patterns, the diverse selection of Evoke has you covered. Embrace the freedom to create and play with a myriad of choices in terms of materials, colours, and patterns, the joy of

easy maintenance, and the assurance of lasting quality.

With Evoke tiles, your space becomes a canvas for your dreams, designed only by your imagination. Step into a world of endless possibilities and let Evoke tiles be the brushstrokes that craft your unique masterpiece.

The unique size enables designers to organise the patterns in a simple grid thereby opening up possible mix-and-match organisations and a range of design configurations. The perception

of durability associated with the Johnson Endura brand extends this unique range into spaces that are not conventionally designed for tiling. Since the tiles come in standard sizes of 20 x 20 cm, it makes it perfectly suitable for application even in tighter spaces, adding a vibrant energy to bedrooms, kitchens, living and dining rooms. With numerous colour patterns to choose from, the mood of the spaces can be elevated drastically, using the right combination of tiles

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Consistence with Convenience

Biren Agrawalla, CEO & Co-Founder of MyTyles talks about how his brand MyTyles celebrates convenience and global craftsmanship

MyTyles exists at the intersection of variety and fine craftsmanship. Established in 2016, MyTyles has tirelessly worked towards digitizing the sale of tiles online. Currently hosting a whopping 8,000 designs sourced from manufacturers, importers and distributors worldwide, it ranks as one of the major players based out of Bengaluru. CEO and Co-founder, Mr. Biren Agrawalla noticed how the vast gap between exclusivity and convenience and how it affected consumers.

Unfortunately, the fragility and handling of the goods have primed the audience to buy from traditional channels. In the process, the variety of the products remained limited. The pricing fluctuations in addition to shipping and inventory slowed the growth of tiles as a commodity that can be sold online. Upon understanding the gaps and barriers through extensive research, MyTyles launched its first display center.

The small physical store in Ramamurthy Nagar paved the way to their sweeping 10,000 feet display center in TC Palya. The growth has been swift and consistent. Serving over 1,00,000 consumers, online and offline, both locally and in other parts of the Southern Indian subcontinent, MyTyles has achieved a tremendous feat but when looking at a purely online endeavor, there's a long way to go. "Despite the access to the what's trending page, there are several barriers to be overcome. We are currently on a mission to educate consumers on how to identify the right products. We are strengthening ourselves as the prime destination irrespective of the taste and the budget of the consumers."

Mission Vision Purpose

Mrs. Kanchan Agarwal, Director at MyTyles notes, "We had to show the initiative." MyTyles curates tiles from domestic and international sellers. Thus, global craftsmanship becomes affordable

and adaptable. Being an online retail hub meant dismantling what it means to provide value. The approach, since day one, has been three pronged. Centered around transparency, affordability and accessibility to variety across pricing tiers, the approach defies stereotypes and popular myths.

One of the biggest misconceptions prevalent in the industry is immunity to the pricing and a disproportionate advantage to premium products. "As long as you are catering to the Indian market, removing pricing as a factor in the decision making is impossible," elaborates **Biren**. Disrupting the operation chain reduces the pricing inconsistencies automatically.





Finding premium grade products and options in metropolitan cities can include a waiting time. From boutique stores to upscale showrooms, alternatives exist. However, tier 2 and tier 3 cities are cut off and rely on the same means as their previous generations. “In Tier 2 & 3 cities, if the store has options, the pricing is way beyond their means. Or if they do have reasonable pricing, the quality can be a hit or miss. With MyTyles, we are trying to provide options to them too.” Furthermore, with imported tiles from Asia and Europe, the choices are merely a few taps away. In addition to one-click checkout, the two day delivery window within Bangalore and two week delivery window in other areas fares well because the delivery windows otherwise are no less than a week.

Current Trends and Challenges

MyTyles runs a close examination of the quality assurance of the manufacturing standards before incorporating their products in the portfolio. Alongside the regular checks and short turnaround times, providing post sales services and customer assurance is a massive contributor towards the positive response that MyTyles has received so far. In the

age of social media, the market has become dynamic. “The socio-economic climate took a huge turn with the introduction of #DigitalIndia. The upcoming generation holds excellent potential for customer readiness as well.” The new-age homeowners have a growing appetite for global trends. This is matched by the ability to handle the risk involved in long distance shipping. It also called for a strict scrutinization of user behavior.

MyTyles pays attention to their online and offline customer service teams. “One of the pillars of convenience is defined by the ease with which our customers can reach out to us. Our customers enjoy having a designated point of contact throughout their journey with us.” Having a dedicated service executive makes the process smoother. It reinforces customer satisfaction as the utmost priority.

Talking about the most popular products, printed Moroccan tiles still remain a favorite. “The balance between colours, shapes and textures agrees extremely well with the Indian preferences and lifestyle.” Spanish tiles, glass highlighters and Textured tiles are extremely popular too.

“Creamier tones and pastel hues have a following of their own” notes **Kanchan**. In addition to the social content, web presence and blogs, MyTyles guides the consumers on visualizing the product in their home and how they can style them.

Kanchan points out, “The need of the hour is awareness. The more people know how to understand their options, the easier it becomes for us to cater to their needs.” **Biren** continues, “We are focused on educating the audience through earmarked social strategies. Besides that, our product portfolios are updated seasonally. We continue to be accessible through our online and offline processes.” Shipping and delivery for a few selected pieces can be unpredictable. “Down the line, we aim to redirect our efforts to launch display centers across Bengaluru and other metropolitan cities. Some delicate pieces do not travel well. We would like them to reach more people.”

MYTYLES is hellbent on normalizing making confident, permanent choices for your home online. Drop by their display center or shop online right from home!

www.mytyles.com

Respecting Tradition

ICCTAS spoke to **Ashhab Usmani and Shakeb Usmani**, Directors of **Shapzu Tiles**, a leading manufacturer of handmade tiles about their passion led venture that pays homage to ancient tile building traditions

Shapzu Tiles has been dedicated to crafting handmade tiles with love. Using proprietary clay blend and glazes, the brand has a team of skilled artisan tiles makers who are ready to craft glazed handmade tiles, porcelain mosaic tiles and printed designer tiles for any interior or exterior project. The brand offers a complete range of handcrafted designs and the option of customisation for exterior and interior applications.

In conversation with Ashhab Usmani and Shakeb Usmani

How did Shapzu Tiles come about? What was the inspiration and idea behind it?

It all began with Shapzu Tiles Founder Mr. Parvez Ahmad Usmani, who had an abiding love of art and handmade tiles made in a traditional way with love and a passion for conservation, Mr. Parvez set out on his own and set up Shapzu Tile in 2011. Shapzu Tiles creates traditional handmade tiles, hand pressed in the same way it used to be done nearly a century ago. Our multihued, endlessly variable tiles are handmade and hand cut in



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traditional ways that goes back to 1000 years.

Shapzu Tiles has been reinventing, redefining the industry, and we are proud to continue standing on our founding principles. We do this by staying committed to using sustainable manufacturing practices, using recycled materials, and taking care of our employees—all the while putting the customer, first.

Your tiles are handmade and bespoke, share the background about the craftsmanship and design selection

We have a saying “True art doesn’t come out of an assembly line”.

All of the tiles made by Shapzu Tile are handmade by our talented craftspeople. Every handmade tile begins with a design, which can be chosen from our huge range of design/size/shapes or exclusively designed to meet your needs. Shapzu tile has a huge repository of traditional design moulds that offer timeless designs that suit any space. We also continuously work to add new design options to offer tiles that suit the most modern of homes.

Creating a handmade tile is an art and we call our employees as artisans as they are the magicians who create these tiles by hand, each tile goes through 12 set of hands from start to end. Starting from manual pressing to hand glazing and firing, each step is being done by an artist. While modern technology has been implemented in many parts of the tile industry Shapzu Tile still bases their handmade tile production on centuries old techniques as we believe it creates the highest quality tile available.

Our new design inspirations come from two sources, our clients (Architects, Interior Designer and Home Makers) and Mother Nature, there are ‘N’ number of designs and configurations, all you need to do is just see.

We work very closely with the client to understand the requirement and concept to create a design which suits the aesthetics of project design or imagination of the client.

How has the market response been so far?

Market response is very good. Today, consumers are inclined more towards

personalization and are even open to spending more than usual. Consumers are more aware today, and they actively spend time and resources in selecting the best tile for their home.

Now a days consumer is leaning towards the environmentally friendly, sustainable products with customisability. That’s where handmade tile come in the picture, giving complete customisability to customer in terms of colour, size, shape and design as well as our handmade tiles are environmentally friendly.

Any projects that you may want to share?

This is the toughest part of our work to choose our best project. All the project we have done are very close to our heart. We work very closely with all our clients to understand and meet their imagination and concept to create a tile which make their space unique and beautiful. Few of our projects that we can name are, Ramgarh Heritage Hotel (Ramgarh), Soho House (Mumbai), Burger King (Pan India), Barbeque Nation (Pan India), Radisson Hotels (Pan India), Vainaar Home (Goa), Gyananda Academy (Nepal), Pacific Interior (London), and many more.





What is the price range and how durable are they?

Our handmade tiles price varies by shape, size and colour. Our price range starts from 200/- per sqft to 550/- per sqft.

If we talk about durability, Handmade tiles offer several advantages over mass-produced tiles. Firstly, they are unique and they add a touch of personality and warmth to any living space. Secondly, they are crafted using traditional techniques that prioritise quality and attention to detail, making them more durable and longer-lasting. Finally, handmade tiles are typically made using natural materials and traditional methods, making them a more environmentally friendly choice that avoids the use of heavy machinery or harsh chemicals.

Here are some of the benefits of handmade tiles

Long Life – Handmade tile is best known for their durability and standing the test of time. In our manufacturing process, each tile is heated up to 1100 degree Celsius over an 18 hour period. All that heat creates great strength for a timeless product.

Easy to clean – Handmade tiles are very low maintenance. The beautiful finish of our glazes not only makes them easy to clean but it keeps them dirt resistant.

Personalisation - We offer custom patterns and designs to our clients. With a variety of beautiful shapes, textures, and over 110 plus colours the possibilities for making a tile unique to you is endless. This is a great way to integrate your own

personal style into the permanent design of your interior.

Can they be customised for any and all surfaces?

Yes, handmade tiles can be customised for all the surfaces to fit the specific needs and preferences of the homeowner or designer. This can include custom sizes, shapes, and colours as well as unique patterns and designs.

Which is the most preferred and hot-selling design right now?

Some of our hot selling designs are

- Feather design
- Fish Scale Tile
- Lantern Tile
- Kitkat Mosaic Tile
- Subway Tile

www.shapzutilies.com

AI in Automation

Cobotics, autonomous robotics, sensors and software are just a few of the latest innovations in the world of Automation

The factory automation market is undergoing continuous technological evolution driven by digitalisation, resulting in increasingly efficient processes based on the use of robotic solutions and constant production monitoring facilitated by onboard sensors, networks and data transfer and processing software. In this context, robotics plays a strategic role, extending the capabilities of existing production lines and revolutionising the production processes adopted in new facilities. With the increasing introduction of

collaborative robotics (cobotics), human operators are aided in repetitive and strenuous tasks. This shift towards flexibility and reconfigurability is in many cases facilitated by autonomous guided vehicles integrated with robotic solutions ready to adapt to the continuous changes typical of mass customisation scenarios. The latest key development is the introduction of Artificial Intelligence (AI), which is increasingly prevalent in critical factory applications such as product quality control through integration into vision systems.

Flexibility and autonomy in managing small and large loads

Collaborative robotics has been taking on an increasingly important role in the latter half of 2023. These robots have diverse load capacities ranging from 18-20 kg for handling substantial loads in contexts such as warehouses and logistics chains down to extremely light payloads (from 1 to 3 kg) for innovative applications such as managing small loads in e-commerce and automating catering services. The increasing use of cobotics applications on Automatic





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Guided Vehicles (AGVs) and Autonomous Mobile Robots (AMRs) allows warehouses to be automated by strategically positioning cobots to provide optimal support to human operators, leading to complete automation and flexibility. This enables a factory to reconfigure itself in real time to meet changing production requirements.

Sensors that collect data, predict malfunctions and detect errors

In such a dynamic context, the sensor technology installed on cobots, autonomous vehicles and production line automation components in general plays a crucial role. Acquired data have an essential function in controlling efficiency, as well as in machine maintenance management and in the correct assessment of the operational workloads of human personnel who play a crucial qualitative role in this automated context, leaving low-value-added tasks to machines. One of the most intriguing

smart sensor applications, which frequently incorporate AI concepts, is industrial vision. This technology is employed for quality control along the production line and for optimising warehouse management, encompassing tasks like smart picking and equipment and goods handling within the facility.

The importance of software for the digital factory

Data acquisition in a smart factory involves the integration of technologies that facilitate the entire data lifecycle, from collection to processing and reporting, with a growing emphasis on aspects such as Human-Machine Interface (HMI), usability and multi-platform design. This ensures that information is readily available and easily accessible to operators, regardless of their working context. One of the key components of Industry 4.0 is automation process management software, which is often developed with a non-proprietary



approach to enable seamless integration with the systems already used on other manufacturers' equipment. These systems are interconnected through industrial networks and software platforms that allow for the generation of dedicated reports, alarm management, process efficiency evaluation and preventive or predictive maintenance routines in fully digitalised factories.



Homage to Hommage!

Villeroy & Boch celebrates 275 years of unique design by showcasing their **Hommage Collection** in the new colour **Pure Black!**



For 275 years now, Villeroy & Boch has been creating exceptional bathrooms for people who live their own style and enjoy every moment. They bring inspiration, comfort, and innovation into many homes.

Their design classic – now in Pure Black Design icons have shaped the history of Villeroy & Boch. After more than 20 years on the market, Hommage remains a piece of modern design history in the bathroom to this day. To mark their anniversary, their oldest bathroom collection appears in the new ceramic colour Pure Black.

The monochrome look of the all-black washbasin and the elegant bi-colour style of the bath featuring a black and white contrast add trendy highlights to any exclusive bathroom. Celebrate the unique Villeroy & Boch lifestyle with their homage to Hommage!

What's New:

Hommage design icon in Pure Black to mark our 275th anniversary

In the new colour Pure Black – elegant, rich deep black

Washbasin with pedestal, made of full-body-coloured ceramic

Bath in finest Quaryl in a black and white look

With black tap fitting for a completely monochrome look or with the new Mettlach premium tap fitting as a golden design highlight.

Enthralling features

Classic

The new matt black lends the design



classic a particularly elegant and modern allure.

Exceptional

The Hommage pedestal washbasin adds a breath-taking highlight to the bathroom, its rich black colour conjuring up a special touch of class.

Comfort and convenience

Hommage Pure Black sets benchmarks in comfort and hygiene, too. With the dirt-repellent CeramicPlus finish, cleaning is fast and easy. Quarryl offers a particularly robust surface which is also very pleasant to the touch.

Hommage pure black washbasin

Exclusive through and through The ceramics in full-body colouring transform the distinctive Hommage forms into an exclusive, monochrome design statement.

Hommage pure black bath

A free-standing statement piece The bi-colour bath presents a masterful



contrast of deep black outer and snow-white inner surface.

Hommage pure black toilet

Elegant, seated comfort With their striking forms and elaborate stepped reliefs, the

Hommage Pure Black toilets are an exquisite highlight in stylish bathrooms.

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Heritage Homage

42MM Architecture has designed **Levana Roof Top Restaurant** in **Lucknow**, which pays homage to the Mughal and the French Architectural heritage of the city

42MM Architecture, a multi-disciplinary practice based in India, specialized in architecture, interior design, urban design and master planning has recently completed work on Levana (a roof-top restaurant) in Lucknow, India, which pays homage to the Mughal and the French Architectural heritage of the city.

The site is located at Hazratganj, a 200-year-old market street at the heart of Lucknow and is one of the most contextually opulent city zones. The spatial planning of Levana has an inward view of the courtyard, while two storeys

on the terrace offers a city view.

The horizontal or vertical plane of the restaurant adorns one of the three primary materials which was used in its design — brick tiles, wood polymer composite (WPC) and concrete. The use of brick tile and WPC creates a sense of the old, while concrete and metal portray a union of the old and the new.

The design highlight of this project is a 30' high wall which forms its backdrop. Offering a restored structure feel, this wall sees the use of humble bricks, held



together by imposing metallic columns and tie bars. The design of Levana Roof Top Restaurant is a homage to the Mughal and the French Architectural heritage of Lucknow. The site is located in Hazratgunj, which is a 200 year old market street in the heart of the city. It is one of the most contextually opulent city zone.

The site is induced with layers of contextuality that Lucknow bears. Through time, the city is embellished with Mughal and French architecture ornamenting it in their respective eras. Investigating through the different iconic structures, we consciously subject the elements and style of a French structure commonly known as Lucknow Residency onto the site. This added a layer of singularity and set the tone for the aesthetics as well the structural characteristics like the imposing metal structure, vintage industrial joinery details, venerable and distressed skeleton.

The Terrace is planned inwards. It looks into an open courtyard that features a monumental truss. The restaurant sits as a backdrop to a 30' high wall that gives a perception of a restored structure. The wall is a brick clad and held together with imposing metallic columns and tie bars. It gives a perception of an old structure that is restored with metal and hence withstood the test of time.

40% of the terrace is covered to create an air-conditioned space. However the openness and the transparency of the site is kept intact with an extensive use of glass. The detailing in the glass and metal features the French industrial era details.



One of the striking elements is the Floating glass box with a glass roof. This feature is the convertible Dance Floor of the restaurant.

The dance floor is aligned with a large bar area that features a rustic wooden skeleton. It bar is clad with logs of charred wood, embellished with metallic buckles. The storage is a classic metal

and glass storage that flaunts the joinery of a French industrial era. The adjoining dining areas feature rustic brick clad walls that is restored with a metal mesh detail on top, to create the perception of restoration. The porous metallic screen creates a partition between the dance floor and dining area and is a structural screen detailed with industrial sensibility.

A wall in the reception area mimics an existing structure of the Lucknow Residency. The distressed and broken look is used to draw a literal inference with the structure. The upper deck features a wood fired oven. The intent was to frame a work area and open it as a visual treat to the visitors.

The material palette is largely constituting Brick tiles, Metal, Wood and concrete. The lights are carefully curated to compliment the industrial touch. A conscious layer of greens is superimposed to balance the visual weight of metal and bricks. The restaurant from outside overlooks the dense city fabric and its iconic structures. From the inside it exhibits the heritage and legacy of the city's architectural history.



www.42mm.co.in

Techno Time

Know about the latest technology and machinery



ABK group makes further investments

ABK Group, one of the leading players in the Italian ceramic industry with revenues of €233 million in 2022, is pressing on with its growth and expansion strategy. Following the acquisition of Gardenia Orchidea and the French company Devres two years ago, the group led by Roberto Fabbri has announced the purchase of the business unit of the former Target Group of Fiorano Modenese, including the brands, equipment, the prestigious office building and the 6,000 square metre factory. As a result, the ABK Group's

portfolio now includes the brands 14 Ora Italiana and Fuoriformato, both positioned in the high-end segment with a strong focus on design and decoration and made-to-order production of artistic ceramics on large slabs. In parallel with the acquisition announced at the beginning of July, the new line for the production of extra-thick large Full Vei 3D slabs began operation in the ultra-modern ABK plant in Solignano (Modena). The result of €20 million of investments in innovation and research, this technological upgrade will allow for the production of through-vein slabs with

controlled digital blending of different coloured raw materials and will increase the group's production capacity to 13 million square metres per year. According to ABK Group's Chairman Roberto Fabbri, these operations "will allow us to achieve the increase in size that we have been pursuing in recent years through an intense investment programme and to create a sales office with dedicated exhibition space for all the Group's brands. It is another important step in our process of repositioning in the luxury segment of the ceramic industry."

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Sacmi to participate in Plastivision India 2023 fair with sustainability and customization

Plastivision India - International Plastics Exhibition is going to take place on 7 – 11 December, 2023 in Mumbai, India. With thirty years of history and 11 successful editions, the event is an important showcase for SACMI to present a unique proposition to the market with an emphasis on its ability to support customers with proposals focused on profitable sustainability. The first 'zero impact' trade fair In terms of cap lines, SACMI is the technological leader in India with its compression technology. The press on display at the exhibition (CCM48) will be fitted with a regrinding machine, which will zero the environmental impact of the demos that will be carried out for visitors (the caps will be re-ground and fed back into the production flow).

The products Thanks to the expertise of its Rigid Packaging Laboratory, SACMI is able to offer comprehensive advice on cap and neck development. It already has solutions on the market and certified by the world's leading brand owners, and the ability to develop customised solutions, also in terms of design. Closures. The new outstanding 26/22 mm proposals, for which SACMI is developing the market's widest range, are also on show at Plastivision 2023.

For example, SACMI's new multi-purpose caps AB26CSDT-5 (GME 30.40) and AB26CSD12 (GME30.41), the lightest on

the market (-35% plastic compared to the traditional PCO1881 finish) combined with the very high performance required for high carbonation. The range for still water has also been improved, with the new ultra-light (1 gram) and premium-look AB26W15, offering an additional 10% savings compared to the already consolidated AB26W-4 11 and AB26W8 (well over 1 gram savings can be achieved, between neck+cap, compared to a traditional 'Alaska' neck). Preforms.

SACMI completes its offer for the perform segment with the IPS. Once again, it is the integrated neck-cap system approach that makes the difference.

On the GME 30.40 and 30.41 for example, together with the standard preform, SACMI offers the special 'light' solution for water (a saving of over 0.70 grams of PET per preform, from 2.71 to 1.96 grams). There is also the solution designed for hot-fill, weighing just 0.15-0.2 g more than the standard preform, but which offers significant savings compared to the conventional reinforced PCO1881.

Containers

In addition to solutions for caps and preforms, SACMI brings CBF technology to India. This is the versatile, high-performance alternative for the production of containers in all types of commonly used resins, PS, PE, PET - a SACMI-exclusive solution proposed for pharmaceutical and dairy applications. The ready-to-market approach All the

solutions proposed at Plastivision India are already on the market and therefore immediately available for use in industry. The SACMI Lab is also in a position to develop ad hoc answers to all kinds of additional production requirements, both in terms of the type of product to be packaged and by providing advanced design advice for creating high-performance and distinctive products.

Computer vision systems

The entire SACMI Rigid Packaging technology range is supported by dedicated Computer Vision systems for each stage of production.


These include the new PVS156, the first solution on the market to be integrated directly into the preform press. This allows intensive production control, with consequent advantages for the process (immediate detection of any process drifts, zero incorrect batches).

The service With SACMI Engineering and a team of local technicians dedicated to all the individual technologies on offer and original spare parts always available, customers can count on excellent service before, during and after the sale. Just recently, the branch has been expanded with the integration of new staff and facilities specifically for providing support for the rigid packaging sector. Visit Sacmi stand at Plastivision 2023! (booth no. HALL 1 / ROW NO. - D2 BOOTH NO. - 1)

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www.maison-objet.com

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www.etacotech.com

THE INTERNATIONAL SURFACE EVENT (TISE)

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Las Vegas, USA

www.intlsurfaceevent.com

KBIS

27-29 February 2024

Las Vegas, USA

www.kbis.com

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www.cevisama.feriavalencia.com

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