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FEBRUARY 2021

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Abhishek Somany, Chairman, ICCTAS, shares the impact of Covid 19 on the overall business cycle of the global and Indian ceramic tile & sanitary ware industry and how the industry has bounced back, and the future ahead!



Abhishek Somany
Chairman, ICCTAS

The year 2020 was the most challenging and unprecedented. No country has been left unscathed by the pandemic and we will only know the real impact this may have on global economies in the future. Just like other sectors, the global ceramic tile and sanitaryware industry had to deal with severe consequences due to this unpredictable 2020 where for largely 6 months across the world all construction activities had come to a grinding halt.

India was no different, but our government managed the crisis very well, which has led to a faster than expected recovery of our sector. Today India is not only the second-largest producer of ceramic tiles in the world, after China, but also the third-largest consumer of ceramic tiles in the world.

India now boasts of being the third-largest exporter of ceramic tiles. The pandemic has had a positive impact on our sectors export growth and many countries abroad have levied an anti-dumping on China and the rest of the world now chooses to hedge their bets with China. India being the next most competitive country for tiles and sanitaryware delivering world class quality is now the favourite for most countries seeking to buy products made by us.

The domestic consumption also has seen a marked increase in demand due to the increased spending on Infrastructure by government, rapid urbanisation and consumer remodelling and rebuilding their homes as they now spend more time at home. Demand for ceramic tiles has increased across residential and commercial spaces but largely contributed by the tier 2 and under towns across the country. It will not be wrong to say, that the demand will be increasing in the future immensely. It is not just the new projects that drive the demand for ceramic tiles in the country but also increasing application of tiles in replacement and renovation projects. Further, the replacement market is expected to witness strong growth in the future, driving the growth of the Ceramic tiles market of India coupled with this we see the export to grow further. Demand for the product like the new touchless and other hygiene centric products in Bathware and the Germ Free tiles will take centre stage and will see traction in the coming years. Our industry is expected to more than double in the next 5 years.

At ICCTAS we are urging the Indian government to consider the lowering of GST for our sector from the current 18% to 12% thus making the product cheaper and more affordable in line with the nations dream to have housing for all over the next few years. We have also requested the government to relook at the various trade agreements with neighbouring nations to promote Indian exports, this would further enhance our export potential.

We can say, Indian ceramic tile & sanitary ware industry has a bright future ahead!

Publisher's Note



We are happy to bring this year's first issue, which gives an overall insight of the industry and post Covid 19 scenario and future plans by all the leading players.

This issue presents an overview of the ceramic tiles and sanitaryware industry for the year 2020, with information related to all the top manufacturers, exporters, importers and the big players. We also carry two articles in the exclusive section, Market Watch, talking about the post Covid-19 scenarios of the Indian ceramic tile and sanitaryware industry and the new alliance of Lioli Ceramica and Caesarstone. There are interviews from the leading tile brands -- Somany ceramics, RAK ceramics, and Varmora Granito, talking about the current industry developments, future plans and their new strategies to scale up their businesses. In the Architect's Take section we have featured an award-winning architect V.S. Vigneswar and his award winning project. Lastly, we have information about the new tiles that have been launched by Indian tile brands and technology brands.

We hope that this year 2021, will bring a renewed sense of optimism and new opportunities and developments for the Indian ceramic tiles and sanitaryware industry globally.

Thank you.



Jignesh Trivedi, Publisher & Editor-in-Chief
(The Tiles of India)



P K Sharma
Secretary General, ICCTAS

Content & Editorial
The Tiles of India Team

Marketing/PR/Design

Panna Roy Choudhury
Sheetal Joshi
Nikesh Shah



Global Industry Insight

Know about the global tiles industry, its production and consumption.

In the last issue of ICCTAS, we had presented the world sanitaryware export and import data 2019. In this issue, we are presenting world production and consumption of ceramic tiles of 2019 with top manufacturing countries, top consumption countries, top importers, top exporters and the big players in this sector.

In 2019, world tile consumption fell from 12,902 to 12,375 million sqm (-4.1%), a decline of approximately 500 million sqm. The biggest contraction was in Asia, where

demand fell to 7,995 million sqm (-6.3%), equivalent to 64.6% of global consumption. As for Europe, consumption grew in European Union countries (from 1,009 to 1,021 million sqm, +1.2%) but declined by 10% in non-EU Europe (from 563 to 506 million sqm). Consumption remained almost stable in the Americas with volumes of 1,257 million sqm (+0.7%) in Central and South America and 544 million sqm (-3.7%) in North America. Demand in Africa rose sharply to 1,002 million sqm (+7.2%), continuing

to far outstrip the continents production capacity.

China, the world's largest producer, consumer and exporter of ceramic tiles, experienced a second severe contraction in terms of production and consumption in 2019. In 2019, India maintained its position as the second largest tile producer with an increase in volumes from 1,145 million sqm to 1,266 million sqm (+10.6%). The increase was not so much driven by domestic consumption, which grew by just 4% to 780 million sqm, as

by a fresh surge in exports. The 20% growth recorded in 2018 (274 million sqm) was followed by a further 31.4% increase in 2019 (360 million sqm), making India the world's third largest exporting country after China and Spain. In value terms, exports reached 1,138 million euros (+32.5%), equivalent to an average selling price of 3.2 €/sqm, which remains one of the lowest figures of all major exporter countries.

TOP MANUFACTURING COUNTRIES

The world's third largest producer, Brazil recorded a 4% increase in production in 2019 to 909 million sqm, while domestic demand stood at 802

million sqm (+3.5%). Exports remained stable at 102 million sqm, almost entirely shipped to Latin American markets and the United States, which in 2019

became the largest export market for Brazilian tiles with 20 million sqm (up 26.4% on 2018).

TOP MANUFACTURING COUNTRIES							
COUNTRY	2015 (Sq.m Mill.)	2016 (Sq.m Mill.)	2017 (Sq.m Mill.)	2018 (Sq.m Mill.)	2019 (Sq.m Mill.)	% on 2019 world production	% var. 19/18
CHINA	5,970	6,495	6,400	5,683	13,157	40.9%	-8.7%
INDIA	850	955	1,080	1,145	1,266	10.0%	10.6%
BRAZIL	986	871	867	872	909	7.2%	4.2%
VIETNAM	440	485	560	602	560	4.4%	-7.0%
SPAIN	440	492	530	530	510	4.0%	-3.8%
ITALY	395	416	422	416	401	3.2%	-3.6%
IRAN	300	340	373	383	398	3.1%	3.9%
INDONESIA	370	360	307	383	347	2.7%	-9.4%
EGYPT	230	250	300	300	300	2.4%	0.0%
TURKEY	320	330	355	335	296	2.3%	-11.6%
TOTAL	10,301	10,994	11,194	10,649	10,174	80.3%	-4.5%
TOTAL WORLD	12,530	13,322	13,627	13,157	12,673	100.0%	-3.7%

Source: Ceramic World Review

TOP CONSUMPTION COUNTRIES

In 2019, Spain maintained its position as the world's second largest exporter, although volumes remained unchanged at 415 million sqm (+0.2% on 2018) and export revenues rose to 2,822 million euros (+3.4%) thanks to an increase in average selling price to 6.8 €/sqm. According to figures published by Ascer, production fell to 510 million sqm (-3.8%)

although Spain maintained its 5th place in the rankings of world producer countries. Domestic sales continued to recover in 2019, rising to 142 million sqm (+5.2%) and bringing total sales to 557 million sqm. France maintained its position as the top export market in terms of both volumes (41.1 million sqm, -0.2%) and value (321.6 million

euros, +8%), followed by the United States with 36.9 million sqm (+11%) corresponding to a value of 304.6 million euros (+17.4%), Morocco (24.3 million sqm, +18.6%) and the UK (23.9 million sqm, +15.9%). Exports to Israel remained stable (17.8 million sqm), while sales continued to decline in Italy (13.2 million sqm; -9.5%) and even more strongly in

Saudi Arabia (11.7 million sqm; -17%). In 2019 the breakdown of Spanish export destinations by volume saw Europe in first place with 42% (49.5% in value), followed by the Middle East and Asia with 20.3% (17.8% in value), Africa with 18.3% (11.9% in value) and the Americas with 18% (19.7% in value).

TOP CONSUMPTION COUNTRIES							
COUNTRY	2015 (Sq.m Mill.)	2016 (Sq.m Mill.)	2017 (Sq.m Mill.)	2018 (Sq.m Mill.)	2019 (Sq.m Mill.)	% on 2018 world consumption	% var. 18/17
CHINA	4,885	5,475	5,498	4,840	4,424	35.7%	-8.6%
BRAZIL	927	789	765	775	802	6.5%	3.5%
INDIA	763	785	760	750	780	6.3%	4.0%
VIETNAM	400	412	580	542	467	3.8%	-13.8%
INDONESIA	357	369	336	450	413	3.3%	-8.2%
USA	254	274	284	289	273	2.2%	-5.5%
EGYPT	190	215	252	236	239	1.9%	1.3%
MEXICO	218	235	242	236	238	1.9%	0.8%
RUSSIA	192	174	194	209	200	1.6%	-4.3%
IRAN	190	169	170	240	200	1.6%	-16.7%
TOTAL	8,376	8,897	9,081	8,567	8,036	64.9%	-6.2%
TOTAL WORLD	12,378	13,069	13,340	12,902	12,375	100.0%	-4.1%

Source: Ceramic World Review

TOP EXPORTERS COUNTRIES

In 2019, the top 10 importing countries imported a total of 1,040 million sqm, equivalent to 36.7% of global import/export flows and just 17 million sqm up from the previous year. With the sole exceptions of Indonesia, which imported just 17% of its consumption, and Thailand at 32%, imports to all the other top 10 importer countries accounted for more than 60% of domestic consumption, with peaks of

98.6% in Iraq and between 90% and 94% in France, Germany and Israel. In 2019 the USA maintained its position as the world's largest importer country despite a 2.4% decline in imports to 204 million sqm, in line with a 5.5% decline in domestic demand from 289 million sqm to 273 million sqm. Imports amounted to 74.7% of consumption, slightly higher than the previous year to compensate for the fall in

local production (including that of Italian-controlled companies Del Conca USA, Florida Tile, Florim USA, Landmark and Stonepeak), which dropped to 83 million sqm in 2019 (-4.6%). More than 70% of US tile imports originated from the 4 largest supplier countries: China (40.9 million sqm; -36.4%), Spain (36.9 million sqm; +11%), Mexico (33.5 million sqm; -5%) and Italy (32.9 million sqm;

-4.8%). At the end of 2019, other countries besides Spain were already benefiting from China's imminent departure from the US market: Brazil, which grew by 26.4%, Turkey (+52%) and India (+383%). In terms of value, Italy remained the market leader with sales (on a CIF basis) of US \$656 million, a 30% share of the total value of imports (US \$2.2 billion).

TOP EXPORTING COUNTRIES

COUNTRY	2016 (Sq.m Mill.)	2017 (Sq.m Mill.)	2018 (Sq.m Mill.)	2019 (Sq.m Mill.)	% on 2019 national pro- duction	% on 2019 world exports	% var 19/18	value 2019 (million €)	average export price (€/sq.m)
CHINA	1,025	908	854	779	15.0%	27.5%	-8.8%	3,895	5.0
SPAIN	395	407	414	415	81.4%	14.6%	0.2%	2,822	6.8
INDIA	186	228	274	360	28.4%	12.7%	31.4%	1,138	3.2
ITALY	332	338	328	323	80.5%	11.4%	-1.5%	4,509	14.0
IRAN	126	148	151	162	40.7%	5.7%	7.3%	188	1.2
TURKEY	83	93	101	116	39.2%	4.1%	14.9%	594	5.1
BRAZIL	94	90	100	102	11.2%	3.6%	2.0%	308	3.0
EGYPT	41	57	68	66	22.0%	2.3%	-2.9%	147	2.2
POLAND	46	45	43	50	40.0%	1.8%	16.3%	313	6.3
UNITED ARAB EMIR- ATES	48	46	42	45	54.9%	1.6%	7.1%	n.a.	n.a.
TOTAL	2,376	2,360	2,375	2,418	26.3%	85.2%	1.8%		
TOTAL WORLD	2,820	2,787	2,806	2,837	22.4%	100.0%	1.1%		

Source: Ceramic World Review

TOP IMPORTERS COUNTRIES

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TOP IMPORTING COUNTRIES

COUNTRY	2015 (Sq.m Mill.)	2016 (Sq.m Mill.)	2017 (Sq.m Mill.)	2018 (Sq.m Mill.)	2019 (Sq.m Mill.)	% on 2019 national consumption	% on 2019 world imports	% var. 19/18
USA	179	194	202	209	204	74.7%	7.2%	-2.4%
IRAQ	106	112	129	124	138	98.6%	4.9%	11.3%
SAUDI ARABIA	188	167	131	116	126	66.3%	4.4%	8.6%
FRANCE	99	104	112	111	113	89.7%	4.0%	1.8%
GERMANY	100	115	109	106	110	90.2%	3.9%	3.8%
PHILIPPINES	60	75	82	91	86	67.2%	3.0%	-5.5%
INDONESIA	45	57	64	77	72	17.4%	2.5%	-6.5%
SOUTH KOREA	72	75	78	77	70	70.0%	2.5%	-9.1%
THAILAND	56	54	55	57	61	32.4%	2.2%	7.0%
ISRAEL	52	57	58	61	60	93.8%	2.1%	-1.6%
TOTAL	957	1,010	1,020	1,029	1,040	59.6%	36.7%	1.1%
TOTAL WORLD	2,710	2,820	2,787	2,806	2,837	22.9%	100.0%	1.1%

Source: Ceramic World Review



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THE BIG PLAYERS IN THE SECTOR

To supplement the world tile production and consumption figures, we are presenting the key data for the sector's leading groups and companies ranked by output volumes and updated 31/12/2019. Along with data for installed capacity, real production, export share and number and locations of facilities (in the tile segment), we also report revenue where available. As these players are large groups that in many cases operate across multiple segments of the ceramic industry (tiles, sanitaryware, tableware, heavy clay) and the supply chain (raw materials, adhesives, distribution), as well

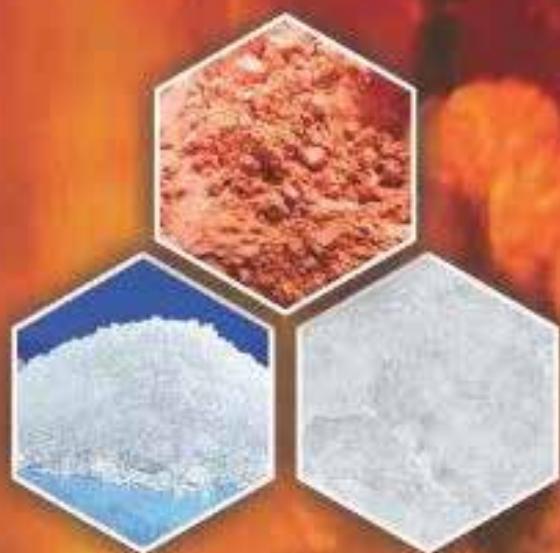
as in other sectors (bathroom and kitchen furnishings, non-ceramic surface coverings, building materials, chemicals, etc.), we indicate both turnover generated solely in the ceramic tile segment and consolidated group revenue. The figures were provided directly by the companies themselves or obtained from public sources, and in some cases are based on estimates. Given the exceptional nature of 2020, a year in which the coronavirus pandemic has had a major impact on the global ceramic industry, we asked companies to also provide their forecasts for the 2020 year-end results in terms

of production, exports and domestic sales. As always, the rankings are not exhaustive and lack several groups which do not release their financial information. These include the largest Italian producer, Concorde Group, which would rank amongst the top three global players in terms of turnover, the largest Egyptian producer Cleopatra, and several Chinese groups. Mohawk Industries, Inc. remains firmly at the top of the rankings of the largest 25 world groups. In second place is the Thai group SCG Ceramics with a 2019 production of 166 million sqm and tile sales of 669 million

euros, slightly down on the previous year. In the first half of 2020, the effects of the lockdown and lower demand for tiles resulted in an 18% decline in sales volumes for SCG Ceramics (from 92 million sqm in 2019 to 75 million sqm). The world's fourth largest tile producer is RAK Ceramics, which has increased its production capacity to 138 million sqm and production to more than 107 million sqm, partly due to the start-up of the large slab factory in Morbi (India).

	Group / Company + Country	Production (mill. sq.m) *estimates	Installed capacity	Export share	Turnover only tile segment (mill. €)	Total turnover (mill. €)	Tile plants / Location	Main Tile Brands / Companies	Forecasts 2020 P= Production E = Exports D = Domestic
1	MOHAWK INDUSTRIES, INC. USA	250 (est. on official company data)	250.9	n.a.	\$ 3,631 mill.	\$ 9,970.7 mill. (ceramics, carpet, laminate, wood, stone, LVT)	23 in USA, Mexico, Brazil, Italy, Spain, Poland, Bulgaria, Russia	American Olean, Dal Tile, KAI, Kerama Marazzi, Marazzi, Ragno, Emilgroup, Eliane	
2	SCG CERAMICS THAILAND	166.0	211.0	13%	669.0	818.0 (tiles + sanitaryware)	21 in Thailand, 7 in Vietnam, 3 in Indonesia, 1 in the Philippines	COTTO, Sosuco, Campana, Prime, Mariwasa, Kia, Trend, Impresso	
3	GRUPO LAMOSA MEXICO	166.0	195.0	38%	647.0	848.6 (tiles, adhesives)	9 in Mexico, 2 in Argentina, 1 in Colombia, 3 in Peru	Lamosa, Porcelanite, Firenze, San Lorenzo, Cordillera, Scop, Princesa, Mallorca, Lamosa USA	
4	RAK CERAMICS PJSC UAE	101.5	138.0	62%	472.0	635.0 (tiles, sanitary, tableware)	14 in UAE, 9 in Bangladesh, China, India	RAK Ceramics, Elegance	P = E = D =
5	GRUPO CEDASA/ INCOPIOSOS BRAZIL	88.2 (2018)	149.2 (2018)	n.a.	n.a.	n.a.	3 in Brazil	Majopar, Cedasa, Vistabella, Lorenza, Incopisos, Vivences, Bellacer	
6	CERAMICA CARMELO FIOR BRAZIL	81.0	84.0	32%	153.0	153.0	4 in Brazil	Cecafi, Pisoforte, Fioranno, Idealelle, Arielle	P ↓ E ↑ D ↓
7	PAMESA SPAIN	80.0	82.0	68%	512.0	704.0	6 in Spain	Pamesa Ceramica, TAU Ceramica, Geotiles, Prissmacer, Ecoceramic, Navarti	P ↑ E ↑ D ↑
8	KAJARIA CERAMICS INDIA	78.1	81.0	1%	353.0	377.0 (tiles, sanitaryware)	10 in India	Kajaria	
9	STN GROUP SPAIN	73.1	76.0	78%	325.0	325.0	2 in Spain	STN, Alaplana, Keratile, Tesany, Vitacer	P = E ↑ D ↑

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10	GRUPO FRAGNANI BRAZIL	69.3	74.0	8%	166.5	166.5	3 in Brazil	Incefra, Incenor, Tec- nogres, In Out	P ↓ E ↑ D ↓
11	DYNASTY CERAMIC THAILAND	62.4	82.0	4%	232.0	240.0	3 in Thailand	Dynasty, Tile Top, Jaguar, RCI, Chicken, Birdy, Swan	P ↓ E ↓ D =
12	ARWANA CITRAMULIA INDONESIA	60.2	65.4	0%	134.0	134.0	5 in Indonesia	Arwana, UNO	P ↑ E ↑ D ↓
13	CERSANIT SA POLAND	54.3	65.0	71%	291.0	515.0 (tiles, sanitaryware)	2 in Poland, 2 in Russia, 1 in Ukraine	Cersanit, Opoczno, Meissen Keramik, MEI, Mito	P = E ↑ D ↑
14	LASSELSBERGER GROUP AUSTRIA	50.5	52.5	n.a.	n.a.	n.a.	5 in Czech Rep., 2 in Hungary, 1 in Romania, 1 in Russia	Rako, Cesarom, LB-Ceramics, Zalakeramia	P ↓ E ↓ D ↓
15	KALE GROUP TURKEY	50.0 *	62.0	n.a.	n.a.	n.a.	20 in Turkey	Canakkale Seramik, Kalebodur, Edilcuoghi, Edilgres, Campani, IDA	
16	VITROMEX MEXICO	45-50 *	54.0	n.a.	163.0	163.0	4 in Mexico	Vitromex, Construpiso, Arko	
17	SOMANY CERAMICS INDIA	42.4	53.0	5%	170.0	190.0 (tiles, sanitaryware)	10 in India	Somany	P ↓ E ↑ D ↓
18	ELIZABETH BRAZIL	43.1 *	56.0 *	n.a.	n.a.	n.a.	5 in Brazil	Elizabeth	
19	CELIMA (Trebol Group) PERU	42.0 *	54.0 *	n.a.	n.a.	n.a.	3 in Peru	Celima, San Martin	
20	VICTORIA CERAMIC DIVISION GREAT BRITAIN	40.0	44.5	65%	350.0	350.0	4 in Spain, 3 in Italy	Keraben, Saloni, Ibero- Casainfinita, Serra, Ascot, Dom	P ↓ E ↓ D ↓
21	INTERCERAMIC MEXICO	40.0	50.0	26%	347.0	485.0(tiles, sanitaryware, others)	3 in Mexico, 1 in USA	Interceramic	P ↓ E = D ↓
22	PORTOBELLO (PGB) BRAZIL	40.0 *	46.0 *	16%	246.0	246.0	2 in Brazil	Portobello, Pointer	
23	H&R JOHNSON (INDIA) INDIA	39.9	70.2	4%	169.0	222.6	12 in India	Johnson, Marbonite, Endura, Porselano	P = E = D =
24	CERAMIC INDUSTRIES SOUTH AFRICA	39.0	49.0	17%	n.a.	n.a.	5 in South Africa, 1 in Australia	Gryphon, Pegasus, Samca, Vitro, NCI	P ↓ E ↓ D ↓
25	CORONA COLOMBIA	35.0	42.0	14%	149.0	466.5 (tiles, sanitaryware)	5 in Colombia	Corona, Orchid	P ↓ E ↓ D ↓

Source: Ceramic World Review

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Global Trendsetter

Anil Beejawat, CEO of RAK Ceramics India spoke with **ICCTAS** about the ceramic tile demand evolving in India presently and based on the new normal dynamics what kind of demand the brand foresees. Also, know about their specific product launches, dealers & distribution networks, new sales strategies and consumer outreach programs and much more..



RAK Ceramics is one of the largest ceramics' brands in the world. Specialising in ceramic and gres porcelain wall and floor tiles, tableware, sanitaryware and faucets, the brand has the capacity to produce 113 million square metres of tiles, 5 million pieces of sanitaryware, 24 million pieces of porcelain tableware and 1 million pieces of faucets per year at their 21

state-of-the-art plants across the United Arab Emirates, India, Bangladesh, Iran and China. Founded in 1989 and headquartered in the United Arab Emirates, the brand serve clients in more than 150 countries through their network of operational hubs in Europe, Middle East and North Africa, Asia, North and South America and Australia.

In India, RAK Ceramics has the largest and most modern vitrified tile manufacturing plant in Samalkot in Andhra Pradesh with a manufacturing capacity of 30,000 sq. mtrs. of vitrified tiles. 3000 sanitary ware pieces/day. The company has more than 8000 designs and shades, making it among the largest range of products globally.

How is ceramic tile demand evolving in India presently?

The India growth story which is often talked about, remains intact with 65 percent population being below 35 years of age. The growth drivers in the shape of smart cities and the industrial corridors, the mega ports, the airports, the railway stations, redevelopment of 25 railway stations, all that growth story



of India remains intact. There is a demand for the construction of office spaces, hotels, retail spaces, entertainment, whatever that was going on, is going to come back. It is a small time set back that we have faced, but I believe these growth drivers are on a solid ground. These were not any hype so to say. Despite the setback as of now, the India growth story, I repeat, remains intact and next year hopefully we will see full-fledged resurgence. The early signs are already visible. In the month of October the GST collections have been better. The industrial growth has been seen at +0.2 per cent from a decline of more than 10 percent, so all these are favorable indices which give us a hope that the demand is definitely going to evolve. Whatever the India growth story was, it's going to continue.

What kind of demand do you foresee, based on the 'new normal' dynamics and how does RAK Ceramics hope to cater to that?

I would say in the present times, it is a little topsy-turvy. In the B and C class towns, things are getting back to normal. Infact, the B and C towns, are the ones that have kept us going. The metros, the A class cities, definitely have faced huge problems. The lockdowns and restrictions carry on even till now. When there was a slight hope visible again, things have reversed a bit and there is a lot of talk about lockdowns and restrictions again.

Despite all that is going on, companies from the organized sector have done reasonably well. We have been able to achieve last year's performances and it is not just about RAK, the industry in general, from the organized sector has done good and from the unorganized sector, the export opportunities have given them a good fillip. Coming to demand for RAK products, thankfully the way things are going I expect a growth much better than the Industry average, by at least 5 percentage points.

Is there any specific product

or collection that we can look forward to? Are there are new sales strategies or consumer outreach programs being created keeping in mind the current times?

There are several things which are going on parallelly. Right now because of this situation, we have given a renewed focus to some of our already existing product ranges like RAK-Sanit range, we had this germicidal range which we had launched long back but then we have now re-launched the same. It is a germicidal anti-bacterial tile. I won't say that it is something new but then, we are giving a renewed focus to this. Apart from this to expand the pie for tile usage, we are trying to expand and promote tiles to areas where they have never been used. We are trying to promote tiles and slabs into unconventional usages, so that ceramic tiles can substitute stones, wood laminates, wall papers and even paints. Earlier these areas were out of bounds for tiles. We are placing ceramic

tiles for usages in all kinds of interiors from cupboards to tabletops, ceilings, to external facades, we have put in our special focus and people to promote and create this kind of a market for tiles and that is something which is definitely going to pay in days to come. We have also launched, KLIMA range of tiles for roof tops, being solar heat reflective tiles. They keep the temperatures of buildings cool and thus act as energy savers. We have in the recent past made two joint ventures and put up a factory for GVT / sintered compact surfaces and ceramic tiles. We have built up facilities to make slabs from 6mm to 20mm thick vitrified tiles suitable for all kinds of usages and applications. As far as consumer outreach in the current situation is concerned things have changed quite a bit. We are not in a position to go and conduct the architect meets, mason meets, and plumber meets. To do all this as per new normal, digital is the way to go, thankfully



the safety and overall well-being of its large family of employees during this phase of restarting?

Safety and overall well-being of our people is not just a matter of steps or initiatives at RAK - it is an obsession. Our group CEO often calls to take an update on same, he wants to keep abreast with all that we do here to keep our people safe. From taking safety measures to ensuring each employee is adequately insured, we make sure that all that has been advised is being followed down the line as well. We have restricted travels to a bare minimum and try to work using the digital media to ensure minimum physical contact. Work from home has been made the norm wherever possible.

What is the future of the Indian ceramic tile and sanitaryware industry?

I would say howsoever evil Covid 19 is but in a way it has thrown great opportunities for the Indian tile industry. In face of negative sentiments against China, India is being seen as a reliable substitute, fortunately Morbi has revolutionized tiles production in India and India can rightfully become a contender for the number one position as Tile exporter to the world. To me the future of Indian tile and sanitaryware Industry looks extremely bright.

5 years ago who would have thought India would export Tiles to China? But that is what is happening today and that is not because of price but because of the quality and high - tech products that this is happening. I am very excited and optimistic for the ceramic tile and sanitaryware industry in India. Infact RAK has ambitious plans to make India as its important export hub going forward.

www.rakceramics.com

Ceramics has in place for the optimum management of this network? How has the experience been for RAK Ceramics as a big brand?

We have close to 1400 dealers in our list, and with the kind of brand image that RAK enjoys, our dealership is a coveted possession for traders by and large. We have different formats for association namely -Official Partner and Premium Partner, depending upon the exclusive space dedicated to RAK products. That apart, we also have 10 company operated Orientation Centres across the country.

As far as experience of RAK as a big brand (one of World's top 3) is concerned I would be lying if I say it is all hunky - dory. Everyone knows once a tile is laid the brand is not visible, Moreover the ease with which planarization of designs happens maintaining a differentiation is quite a task. Yet with innovation at the core RAK is one brand which sits at the top of the pecking order and we hope to maintain this position in the future as well.

What kind of initiatives/ steps is being taken by RAK Ceramics to take care of

the acceptability with clients is also encouraging. We are using social media very effectively to reach out to our own people, our large family of dealers and sub-dealers network and then to the customers, we are present on facebook, instagram, twitter, and all possible digital media so that whatever idea is there, we can convey to our audiences in the most convenient way. Though the touch and feel part of the finalization of specification happens only after a sample has been seen but quite a lot of work happens digitally these days.

In terms of logistics, how does RAK Ceramics cope up with the challenges, if there are any?

Our mother plant is located in Samalkot, Andhra Pradesh and JVs are located in Morbi. Definitely there are logistics challenges in catering to All India markets, but with present facilities we are able to serve south, west and east India markets quite effectively, North and North-eastern markets are a challenge for us still and at some point of time we will address the same by having a manufacturing facility in North.

What is the kind of dealer, distributor network that RAK Ceramics works with? Can you tell us a little about the scale, numbers of this network? Can you also share some useful SOPs that RAK

Forefront Leader

Abhishek Somany, Managing Director of Somany Ceramics Limited shares with **ICCTAS** about the company's current scenario post Lockdown.

Founded in 1971 by late Shri H. L. Somany, Somany Ceramics is an internationally acclaimed organization that specializes in ceramics and allied products. In the last five decades, Somany Ceramics has established itself as an unchallenged leader in the Indian Ceramic Industry with significant presence in India, Africa, The Middle East,

United Kingdom and Russia. With 49 years of redefining the Indian interior décor and tiles industry, Somany Ceramics is the ideal destination for an extensive range of products including ceramic tile, floor tiles, polished vitrified tiles, digital tiles, wall tiles, wall claddings, sanitary ware, bathroom fittings, and state-of-the-art tile laying solutions. The company provides complete décor solutions for evolving needs of customers and the dynamic trends in the market.

How is ceramic tile demand evolving in India presently?

India post pandemic is witnessing a demand upsurge from tier 3 & under market. Moreover, large scale home improvement projects are also underway. Due to China not being the favourite anymore, India is seeing a huge upsurge in export demand. Real estate Industry in India is also finally beginning to revive slowly.

Do you feel that Covid19 has impacted the overall business cycle and if yes, how and to what an extent?

Business during the lockdown was severely impacted. The

Working Capital cycle went for a toss. The first 2 months of the year, we witnessed zero production & almost zero sales & Zero receivables. Since August, markets have started improving & by November it's near normal.

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

The mid value products are most preferred, high value product volume is also increasing gradually from New touchless & hygiene products in Bathware, Germ free tiles will take center stage.

How do you plan to scale up manufacturing?

In our own plants, the focus is on value added goods, and we are increasing our outsourcing for the mid and regular ranges.

What kind of demand do you

foresee based on the new normal dynamics and how does Somany hope to cater to that? Is there any specific product or collection that we can look forward to? Are there new sales strategies or consumer outreach programs being created keeping in mind the current times?

The sizes 60*60, 60*120, 80*160 are in vogue. Demand is good for tiles from the tier 2, 3, 4 towns which has seen app 10% increase in volumes as compared to last year; we plan to increase our footprints in the gap town, and spread or reach.

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

Tile market will double if not

more in 5 years. We have been strong in innovation and new product offering, in the future Somany will remain a leader and in the forefront of the Indian ceramics industry.

Lastly, what kind of initiatives/steps is being taken by Somany to take care of the safety and overall well-being of its large family of employees during this phase of restarting?

The COVID-19 wave left the world so dumbstruck and unsure that we suddenly had to accept the unexpected and address all questions, fears and anxieties surrounding the pandemic. With consistent engagement and active communication, we eased our employees through the post-lockdown period.

To safeguard our employees across all locations, we established stringent rules and restrictions and ensured our workplaces are safe, conducive and stress-free. Understanding the need of hour, we extended flexibility to work from home and allowed our field staff to head home after meeting clients and dealers so as to reduce their exposure to Covid

To keep the employee morale high, we organized continuous learning webinars, employee connect programs, family contests, health orientations and on-line get together. On the top of all initiatives taken, the most important was to keep everyone well informed through regular connect and ensure 100% adherence of safety protocols.



Marching Ahead

Indian ceramic tile and sanitaryware industry demand post Covid-19.



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.

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.

The ceramic tile industry may gain traction as Indian ceramic tile exports to GCC countries and newer export markets such as the US, Indonesia, and Thailand have become functional again. Exports are expected to gain notable traction in the next 2-3 years.

The Covid 19 pandemic impact has been seen all over the world. It had a substantial negative impact on the construction industry as well, although the legal repercussions differ from region to region and contract to contract.

But now the scenario is different. There is a paradigm shift in the way the world is looking at China as their choice for tile sourcing from Asian market due to hygiene and reliability factors. The majority of the tile importers across the globe are switching to the other sourcing destination like India, Vietnam, Malaysia and Bangladesh from the second half of CY 2020. India being the second largest tile producing and consuming market, it is going to be the first choice for importing ceramic & porcelain tiles.

India has rich natural resourcing for ceramic raw



materials, having 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. India 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 and 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

A Global Alliance

Caesarstone enters global porcelain countertop market through majority stake acquisition of **Lioli Ceramica**.

Caesarstone Ltd., a leading developer and manufacturer of high-quality engineered surfaces announced that it has entered into a definitive agreement to acquire a majority stake in Lioli Ceramica Pvt. Ltd., an India-based producer of cutting-edge porcelain countertop slabs, operating innovative and technologically advanced manufacturing facilities in Asia, with annual revenue of approximately \$18 million.

Caesarstone is a concept and lifestyle-driven company with a customer-centered approach to designing, developing, and producing high-end engineered surfaces used in residential and commercial buildings. The products offer superior aesthetic appeal and perfected functionality through a distinct variety of colors, styles, textures, and finishes used in countertops, vanities, wall cladding, floors, and other interior surfaces.

Porcelain represents one of the fastest growing categories in the global countertop market and directly complements Caesarstone's established presence in engineered quartz surfaces. The acquisition provides an attractive entry point for Caesarstone to leverage its strong brand, design capabilities, sales force and global distribution network to enhance customer engagement around the world with a multi-material offering of premium countertops.

Located in the center of India's porcelain hub, Lioli's high-quality, low-cost, vertically-integrated operation will supply porcelain countertop



offerings to Caesarstone, which will be marketed in all regions alongside quartz under one leading global Caesarstone

brand. Yuval Dagim, Chief Executive Officer commented, "This acquisition is a major step in our efforts to advance

our global growth acceleration plan and to realize our goal of becoming a leading premium, multi-material player in the global countertop industry. The acquisition will enable us to have a significant presence in the global porcelain category, one of the fast-growing categories in the countertop market, alongside our reputable quartz portfolio.

Lioli's state-of-the-art porcelain operations combined with Caesarstone's highly valued brand and established global network will strengthen our unique value proposition and our ability to accelerate a multi-material growth strategy. In this way, we can enhance the experience of our consumers and business partners, while realizing our mission to be the first brand of choice for countertops around the world."

Under the terms of the transaction, Caesarstone has entered into a definitive agreement to acquire a majority stake in Lioli for a cash investment of approximately \$12 million, representing an enterprise value of approximately \$34 million, including the assumption of debt and additional consideration of up to approximately \$10 million upon the achievement of certain milestones.

The transaction is expected to close in 2020, subject to customary closing conditions, and is expected to have a favorable impact to earnings beyond 2020.

www.caesarstoneus.com
www.lioliceramica.com

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- ▶ Surging ahead into sanitaryware & faucets under the brand name - Kerovit
- ▶ Forayed into plywood under the brand name - KajariaPly

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Living Bathrooms

Duravit offers a wide range of options for bathrooms that create a sense of wellbeing.



The bathroom is increasingly changing from its traditional form into a comfortably appointed room with an appealing ambience. Duravit, the leading name in bathroom products and designs has a wide range of options that creates a sense of wellbeing. Duravit AG,

founded in 1817 and headquartered in Hornberg, Germany, is primarily a manufacturer of porcelain bathroom fittings. The brand is notable for having employed prominent designers such as Philippe Starck, Sieger Design, EOOS, Phoenix Design, Frank Huster, Christian Werner

and Matteo Thun for its product lines. In recent years, the company has diversified its scope to include other products. Founded as a small earthenware factory by Georg Friedrich Horn in 1817 in the Black Forest, Duravit did not begin to produce sanitary fixtures until the early 20th

century such as sinks, bidets, and toilets.

In the 1980s, the product line was expanded to offer bathroom accessories. The brand also saw the further growth of product lines, including the introduction of bathroom furniture. In 1994, it opened a new, modern plant for the production of sanitary ceramics. The expansion continued in the first decade of the 21st Century with the establishment of subsidiaries in Turkey, India and China. The Duravit Design Center in Hornberg, designed by Philippe Starck, was also completed during this time. The brand is currently available in over 130 countries.

Have a look at their latest product ranges

Comfortable seating options

A further option for the series Happy D.2 Plus from Sieger Design is a seat featuring an integrated drawer that can be optionally added as a practical extension to the console on the left or right. Duravit also offers a cushion in matching greige made from a woven fabric suitable for wet rooms – the perfect place to pass the time as your nail varnish dries or your facial mask works its magic.

High-quality materials

The way in which selected materials are combined is an essential element in creating a sense of wellbeing. With the bathroom series Luv, the Danish designer Cecilie Manz succeeded in imbuing the bathroom with Scandinavian *joie de vivre*



thanks to a carefully considered collage of materials. Four different console panels made from quartz or solid wood, furniture fronts with satin matt lacquers, and washbasins with subtle color accents open up individual design options.

Order and structure

Tidy surroundings enhance wellbeing. The Duravit drawer

systems, optionally available with integrated interior accessories, provide the perfect storage space for essential bathroom utensils. The solid-wood organizer system is optionally available in Maple or Walnut. From your wristwatch to your lipstick – everything is at your fingertips.

www.duravit.com



A Mega Venture

Varmora Granito to invest around Rs. 300 crore in two state-of-the-art high-tech plants in **Morbi, Gujarat, India.**

Varmora Granito, one of the India's leading tile and bathware brand is setting up two state-of-the-art high-tech plants at Morbi in Gujarat. The company is planning to invest around Rs. 300 crore in 35,000 sq meters per day facility for large format GVT tiles. The company expects the plants to be fully commercial operations by April 2021 and will generate 1,200 direct and indirect employment opportunities. The company celebrated 25 years of innovation, design and technology, setting a target of Rs.1,600 crore revenue in the next 2-3 years.

Varmora Granito has emerged as one of the largest ceramic companies of India having around 5,000 product designs across segments. The company offers wide range of products including, ceramic floor, digital wall, parking, porcelain, digital glazed vitrified, double charge, outdoor, slabs, etc. The company has 11 state-of-the-art manufacturing facilities with

installed capacity of 1.1 lakh square meters per day.

Recently the virtual stone laying ceremony of the new plants was conducted by the hands of Hon'ble Chief Minister of Gujarat, Shri Vijaybhai Rupani in Gandhinagar, Gujarat, India. Additional Chief Secretary - Industries and Mines (Gujarat), MK Das, IAS was also present during the ceremony.

"Trusted for reliability, innovation, quality consciousness, design and technology Varmora has created a strong brand identity for itself which is well recognised globally. The company looks to strengthen its identity as the leader in the Indian ceramic industry by consistently introducing innovative and value-added products in the market to keep pace with its valued customers. The proposed expansion will help us to meet the growing demand from export market as well as serve the domestic markets better." said **Bhavesh**



Varmora, Chairman, Varmora Group.

Varmora Granito is ranked amongst top tile and bathware brand in India and manufacturing a wide range of wall and floor tiles, slabs, sanitaryware, faucets and kitchen sinks. With 11 plants, company's installed production capacity stands at 1.1 lakh sq.

mtr. per day. The company has a strong presence in domestic market with 7,000 plus touch points including dealer & sub-dealer network, over 250 exclusive showrooms and 15 overseas showrooms. For the FY20 company reported sales of Rs. 1100 crore.

"We are expecting a double digit growth in the sales in current financial year with a robust demand from export market especially North and South America, Europe, Africa and Middle East Countries. With anti-china sentiments across the World and USA imposing heavy duties on tiles from China we anticipate huge export potential for Indian companies. In the next 2-3 years, company has set a target of Rs. 1,600 crore revenue, expand export network to 100 plus countries from 70 currently and increase exclusive showrooms to over 320," said **Bhavesh Varmora.**

www.varmora.com



Revitalized Spaces

Spatial Inserts at **CHENNAI ONE** is an award-winning project designed by architect V.S Vigneswar of Architecture plus Value.



CHENNAI ONE is a 3.8-Million Sq-Ft IT Park located on the Information Technology Corridor of Chennai, O.M.R (Old Mahabalipuram Road). Designed by the award-winning architecture firm Architecture plus Value, in the presence of chief architect and founder V.S.Vigneswar, It is one of the most successful and sought after IT Parks in Chennai. A+V was hired directly by the owners of the property to design a series of Spatial Inserts in the I.T. Park to re-vitalize the user experience of the facility. The Design process started with identifying key nodal spaces which could add maximum VALUE to the 5000+ daily users of the building. These spaces or elements were interface points where the multiple tenants of the building could congregate or have chance encounters. The identity of the building was also determined



by these designed elements, which were connected together through the design language and material palette. The Spatial Inserts range in size from a large 500-seater amphitheatre to a cafeteria designed in a residual area under the grand stairs.

Below is the sequence of spaces and their design ideology:

Façade:

It was the face of the project from outside and had to gel with the expectation of a glass façade for I.T parks. The installation was designed as a series of aluminium fins of multiple colours which bridged the two glass blocks and also acted as a signal point for the building entrance. It was kept porous and inviting to signify the welcoming aspect of the project.

Grand Stairs

The entrance to the atrium





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was through a large staircase which was designed with tensile roofing to bring natural light. The walls were organised with a series of light elements, wooden panels and art work. The flooring was distinguished with two different materials to high-light the movement pathway and spaces for people to sit.

Lobby

The entrance lobby for each block was on either side of the grand stairs. The lobby was designed with a porous false ceiling in re-cycled MDF strips. Staggered lighting patterns were evolved to give a sense of movement. The walls were treated with custom designed wooden panels at different levels and a world map in stainless steel.

Coffee Shop / Café

A café was designed in the unused residual space below the grand stairs. The theme of the café matched the rest of the design. The décor and design of the café gives a relaxing and warm feel with strip wooden ceiling, wicker lamps and custom wooden furniture. The furniture and décor was supplied by Annai Design Studio.

Atrium

The main atrium between both the blocks was a very special area. The design integrated water bodies and indoor vegetation to provide seating spaces and a visual high-light to the entire facility. The Atrium is the central aspect of the entire project and is visible from all floors. The lifts on either side were clad with reflective elements to expand

the feel of the space. Additional natural light floods the space through the Tensile roof above and completes the ideal picture of a break space for the tired I.T employee.

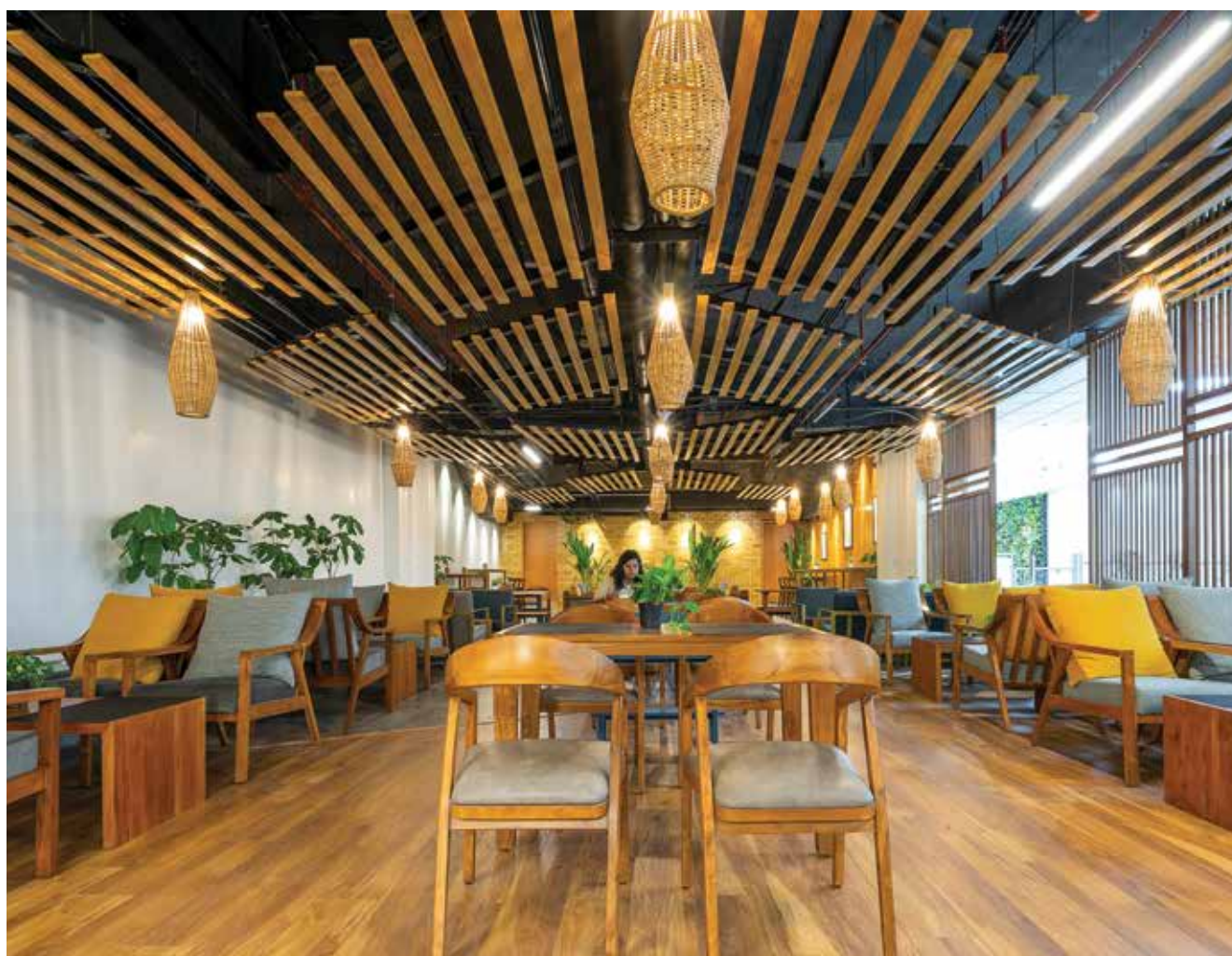
Amphitheatre

An extension of the Atrium was designed as a closed Amphitheatre. The seating was made in a series of steps with different stone patterns to high-light the movement and seating points. A central skylight was designed with CNC Cut MDF baffles which give a constant illumination to the space throughout the day without glare. The Amphitheatre hosts various events for the tenants and also serves as an informal hang-out or congregation space.

The designed spaces have re-vitalised the entire facility.

The users use the spaces not only for transition but also as a place of congregation during and after office hours, to hang-out & socialise. The introduction of natural light and indoor vegetation add tremendous value to the project. The entire Interior design is entirely sustainable from the choice of materials to the energy usage. It is a low-cost project which has high-impact. This made the client very happy. The user experience of the facility and the marketing of the new blocks have been significantly enhanced due to the designed Spatial Insets. The design has created a place of happiness amongst several constraints, which were turned into opportunities to add value to the lives of several people.

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Step into the revolutionized world of staircases with Kajaria Step Stone Stairs. Staircases are more than just a functional unit in houses, rooms and hallways today. These practical units have an interesting design aspect to them that can redefine home spaces. Kajaria Step Stone Vittrified Steps and riser come with a variety of shades and colours to enhance your spaces to the next level. These are designed for easy installation and providing durability to the staircases. With a bull nose finish and anti skid properties, these are crafted to specifically prevent injuries. Kajaria Step Stone Vittrified Steps and riser are the perfect blend of beauty and functionality for modern spaces.

www.kajariaceramics.com

ORIENTBELL TILES

Orientbell Tiles launches a new range of Elevation Tiles to give your house a modern yet classic finish. These tiles has been designed to bring the house of your dreams to reality and helps to create a vision of a perfect entrance for your house with natural designs of woods, stones, bricks and bamboo. The designs made on a high strength body have wide grooves as well to keep maintenance and cleaning easy. The range is available only in large size 300x600 mm for higher appeal. With designs in stones of different sizes and in a range of natural colours, these tiles can be applied on interior as well as exterior walls.

www.orientbell.com




CLASSIC MARBLE COMPANY

Classic Marble Company has introduced the Grand Antique - a stunningly gorgeous black marble from the 9th Avenue collection. The luxury marble is limited edition stone displaying a chaotic web of white against the jet black backdrop. The marble slab has one of the most intriguing nature's designs suited for a modern surface design. The Grand Antique, with its contrasting black and white, is one of the most versatile marble in its range. Whether in the bath, living area or in the bedroom, the stone is relaxing and stimulating to the senses. The marble designs offered in the limited edition collection are exquisite as well as rare. The marble slabs are designer products and is targeted towards a niche consumer base that lives a discerning lifestyle.

www.classicmarble.com

SIMPOLO CERAMICS


Simpolo Ceramics latest Ricco collection is made with iM+ Technology. This innovative collection is made with POSH Surface and consists of 18 extraordinary designs in two sizes 120x240 and 120x180. Laying your hands on POSH surface it will make you realize the elegance of the finish and you will understand how the 'Posh' feels like. With this innovation, the brand has overcome the myth that smooth surfaces get scratches and stains. Despite having unmatched smoothness, POSH Surface is resistant to scratches.

 www.simpolo.net




ASIAN GRANITO INDIA LTD.

Grestek MarbleX from Asian Granito India Ltd aims to create a style that is artistic yet natural. MarbleX is a perfect fusion of colours, creation. Marblen range is available in 110+ design, 4 large format sizes, and 5 finishes. The company has recently launched a new range in 800X1600 mm size with 14 unique designs that fits best as per the current trend of the home décor. Big size & Modern Look of AGL MarbleX make them suitable for residential, offices, hotels, malls, airports, etc. and they are an ideal choice for interior and exterior spaces. Thanks to its large format, AGL MarbleX is the perfect for wall & floor solution and the ideal choice for Facades as well.

 www.aglasiangranito.com

ROCA

Roca has introduced the all new EP-2 Sensor flush plates in the Indian market. These innovative flush plates are equipped with sensor-based technology that detects the hand movement of the user and automatically flushes the WC. The touchfree flush plate also offers many other features like automatic flushing, hygienic flushing and a quick and easy installation. EP-2 Sensor flush plates are based on the principle of sensory activation and captivating designing. It boasts a technology that eliminates any kind of direct contact, preventing the transmission of microorganisms and maximizing hygiene. It operates wholly on sense, is made of special glass material that is easy to clean and prevents germ build-up. The EP-2 Sensor flush plates are compatible with all the existing range of Roca concealed cisterns.

 www.roca.in



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Know about the latest launches in technology and machinery brands.

New biggest Dryer for Extruded product by Sacmi

This solution boosts the output capacity of the Gresmanc Group - a Spanish manufacturer of extruded floor, wall and ventilated façade products and a world-beating leader for over 30 years - and underscores the soundness of SACMI technology. From a product viewpoint, markets are more and more appreciating the outstanding characteristics of extruded ceramics. Quality, durability, huge aesthetic potential and the ability to create trims give extruded

ceramic products tangible added value. Hence the investment decision by Gresmanc - a Spanish giant of the industry - which has now installed and started up a new SACMI 5-tier E5E dryer, the largest ever built by SACMI for such products. Successfully tested in September - despite the challenging international situation - this dryer is almost 74 metres long; it is used to make alveolar plates for ventilated façades, up to 3 meters long, and extruded porcelain stoneware steps, up to 1.6 meters long. In addition to the dryer, SACMI

has supplied Gresmanc with all ancillary systems, namely the loading-unloading machines that ensure optimal automation and efficiency of production flows. This latest supply will allow Gresmanc - a leading industry player for over 30 years - to expand its catalogue even further, in keeping with its constant focus on technological development and market trends. More specifically, this dryer brings out the best in one of the company's flagship products, the extruded step, a digitally decorated monobloc that differs from traditional

solutions in that it has no glue, offers excellent aesthetics, outstanding durability and is easy to lay. For SACMI, instead, this order strengthens the role of the EXTRUD TILES brand. With its broad range of technical and plant engineering skills, the latter allows the SACMI Ceramics Division to develop solutions for this sector and gives extruded products added value, in synergy with traditional floor and wall tiles.

www.sacmi.com



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Contact: 9982671914, 8769360207 (Deepak Sharma)

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System Ceramics Superfast ceramic pressing

The power of ideas creates new standards in ceramic pressing with Superfast by Systems Ceramics. Superfast is the world's first and only moldless press, able to guarantee advantages and levels of performance unreachable with traditional pressing systems. It's a process innovation that allows ceramic companies to manage the entire manufacturing process with unprecedented flexibility and zero waste.

With its moldless operation and unique belt system for all formats, Superfast is able to produce, from a single sheet, tiles starting from 60 cm, 80 cm and

90 cm modules in thicknesses ranging from 3 mm to 30 mm, making the change of size and thickness operation extremely quick and simple by means of software. The absence of the mold ensures improved flatness and no residual internal stresses. In addition to its simplicity, flexibility and ease of use, Systems Ceramics technology has achieved another important milestone relating to the recovery of ceramic waste originating from the pressing and unfired cutting phase.

Superfast is a zero-waste process, that is to say, there is no waste material. The waste is 100% recovered and reintroduced into the production cycle,

through real-time grinding at the side of the press, followed by the mixing phase, making it possible to reuse the material thanks to the double loading provided for by the forming process. In other words, in the double-loading operation, the recycled material is applied to the base of the ceramic tile and the pure atomized material is applied on top of this layer. This extremely efficient and value-added process is managed in a simple way by software, and being a zero-waste system, there is the benefit of a lower consumption of raw material.

Superfast makes it possible to produce smooth and structured surfaces up to a depth of 3 mm, with the possibility of having up

to 4 different structures in the same production cycle.

In a smart manufacturing approach, the system can be inserted in an Industry 4.0 context, thanks to the cutting-edge instrumentation with which it is equipped with, through the Prime software platform developed internally by System Ceramics.

The focus on the development of technologies aimed at an increasingly flexible form of manufacturing is key for System Ceramics that is also focused on energy savings which, with Superfast, exceed 70% compared to traditional presses.

The process also stands out for its high productivity: with a



single Systems Ceramics press, it is possible to achieve a daily output of 20,000 sq.m of tiles,

a volume that would require the use of two conventional presses. In addition, Superfast

has the advantage of being able to process any kind of atomized material (porcelain stoneware,



monoporosa, red body or dry granulate). With regards to the cutting phase, it is possible to combine unfired and fired cutting, thereby further increasing the flexibility of the management of formats for effective “make-to-order”. Superfast is available in several models in order to fulfill the needs for a more demanding flexible manufacturing.

www.systemceramics.com

EFI Cretaprint Hybrid Ceramic Printers

EFITM Cretaprint Hybrid printers are able to operate with water-friendly inks as well as current eco-solvent based inks. The new hybrid printers have improved their ink delivery system, cleaning and electronics to keep humidity and prevent sedimentation. They are available in widths from 700 to 1400 mm and with up to 12 printing bars. They include the 5th generation Cretaprint® software that makes them the Smart Printers for ceramic because of connectivity and user applications: TAS, automatic tone adjustment Fine Tunning Density Compensation Scada application for Industry 4.0 EFI Go app for mobile devices ID Printing for master tiles and traceability. Hybrid printers use new EFI print-head, e-Q5, which is of hybrid nature, created with waterproof components, offering great reliability. This is the newest hybrid tile decoration system that includes: Hybrid inkjet ceramic printers Digital glaze application Water-friendly inks and glazes Dedicated color management software for ceramics: Fiery proServer and a configurable service program that covers technical assistance, preventive maintenance, print-head replacement and financing.

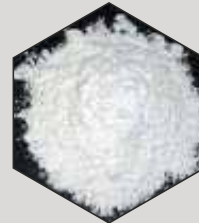
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ABOUT US

In 1996, with the aim of marketing and producing frits and compound glazes **Welsuit Glass & Ceramic Pvt. Ltd.** established in Vadodara (Gujarat, India) . A rising star as a ceramic glaze industry **Welsuit** has become a large-scale modern enterprise ranging from production, Raw materials purchasing, R&D laboratory, marketing, global importing and exporting - for the development of the driving force to the research and development of new products, the production and marketing of products based products, service assurance, to build strong global market channels chain, and strive to build global brands.

Welsuit has a professional R & D team, R & D lab based in at work premises, this team has more than twenty years of experience in glaze product development, new product development and innovation has always been to meet the market customer demand for the purpose.

FRITS



Welsuit has developed a great variety of frits and glazes for the varied manufacturing processes and temperatures used in the market. These frits allow any type of finishes (matt, glossy and semi-glossy) as well as opaque or transparent glaze formulations and providing different touches from satin to rustic.

APPLICATION



WALL TILES



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4th Floor, PHD House
4/2 Siri Institutional Area
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