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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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Abhishek Somany, Chairman, ICCTAS, shares with us the new market opportunities that are urging growth of the Indian ceramic tile and sanitaryware market and the challenges ahead.



Abhishek Somany
Chairman, ICCTAS

The year 2021 had suddenly changed the outlook of several industries in a matter of a few days. The second wave saw a downfall in the overall business and in the global ceramic tile and sanitaryware market. But slowly there has been a recovery in the production in all other ceramic producing countries which has driven a global recovery. The investments in technology have also exceeded the forecasts made by the global ceramic plant and machinery manufacturers.

This has also been aided by the increased spending on infrastructure by the government, rapid urbanisation and consumer preference shift, which, in turn is encouraging the demand for ceramic tiles in residential and commercial buildings across the countries. It is not just the new projects that will drive the demand for ceramic tiles in the country but also increasing application of tiles in replacement and renovation projects.

The rapid pace of urbanization in emerging economies is a key driver of the market. There is a growing number of remodelling projects in offices, hotels, and homes that are focusing on imparting makeover to wash basins and water closets and are being smartly crafted to meet these requirements, thus expanding the sales opportunities in the ceramic tiles and sanitaryware market.

Talking about this year's and challenges ahead, it is going to be a tough year with the gas prices increasing which is 30 percent of the input cost. Also, the high rates of freight which has and will slow exports for the industry as a whole, until the freight rates start going down. ICCTAS is actively following up with the government to reduce the rate of GST from 18 percent to 12 percent and also to bring gas under GST.

Most definitely the technology advancement will open new avenues for new applications. Tiles have the potential to replace many traditional wall and floor coverings material going forward. Earlier the largest size one can produce was 2 feet by 4 feet, now this has changed and one can product 6 feet by 10 feet and also 3mm thin tiles.

Publisher's Note



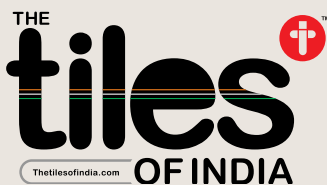
In this ICCTAS issue, we bring to you the world tile production data with top consumption countries, exports, imports and big players of 2020. Also, know about the world sanitaryware market export and import growth and the leading countries. We have interviews with KE Ranganathan, MD, Roca Bathroom Products Pvt Ltd. and Sarat Chandak, CEO and Executive Director, H&R Johnson (India) Division. Kajaria has made a major investment in Sacmi, know about its future plans. Torrecid Group shares with us their future innovations. Duravit and Hindware, give us a sneak- peak into their new collections. Architect Siddhina Sakla of The Arch Studio shares with us her latest project 'Muted Home', situated in Pune, India.

All in all, this issue is an attempt to give you an insight of what is new in the ceramic tile and sanitaryware industry by leading brands and their future plans and innovations along with the world tile and sanitaryware production and consumption data.

Happy Reading



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



World Tile Production Insight

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

TOP MANUFACTURING COUNTRIES

In 2020, world tile production rose to 16,093 million sqm, up 1.7% from the 15,827 million sqm of 2019. Production in Asia grew by 2.8% to 11.9 billion sqm, equivalent to 74% of global production; this positive result was mainly due to the increase in volumes produced in China, India and Iran, which offset the contraction in Vietnam and Indonesia.

The European continent produced a total of 1,856 million sqm (11.6% of world production): production in the European Union fell by 6.6% (from 1,304 to 1,218

million sqm), while production in non-EU Europe recovered (638 million sqm; +11.9%), thanks to the sharp upswing in Turkey. Production on the American continent fell to 1,409 million sqm: in North America the losses amounted to just -2.7% (321 million sqm), while in Central and South America, the region worst hit by the extended 2020 lockdowns, production fell to 1,088 million sqm (-7.6%).

Growth continued in Africa, where production was estimated at around 918 million sqm in 2020 (+6.1%). In addition

to Egypt, which maintained its leadership position in the continent despite the fall in production to 285 million sqm, and Algeria, which stood at 185 million sqm, sub Saharan African countries (Ghana, Tanzania, Ethiopia, Kenya, Sudan, Uganda, Senegal, Zambia, Zimbabwe and Angola) continued to grow with levels of production of between 10 and 50 million sqm (mostly attributable to Chinese investments), while Nigeria's production amounted to 114 million sqm.

TOP MANUFACTURING COUNTRIES							
COUNTRY	2016 (Sq.m Mill.)	2017 (Sq.m Mill.)	2018 (Sq.m Mill.)	2019 (Sq.m Mill.)	2020 (Sq.m Mill.)	% on 2020 world production	% var. 20/19
1. CHINA	10,265	10,146	9,011	8,225	8,474	52.7%	3.0%
2. INDIA	955	1,080	1,145	1,266	1,320	8.2%	4.3%
3. BRAZIL	871	867	872	909	840	5.2%	-7.6%
4. VIETNAM	485	560	602	560	534	3.3%	-4.6%
5. SPAIN	492	530	530	510	488	3.0%	-4.3%
6. IRAN	340	373	383	398	449	2.8%	12.8%
7. TURKEY	330	355	335	296	370	2.3%	25.0%
8. ITALY	416	422	416	401	344	2.1%	-14.2%
9. INDONESIA	360	307	383	347	304	1.9%	-12.4%
10. EGYPT	250	300	300	300	285	1.8%	-5.0%
TOTAL	14,764	14,940	13,977	13,212	13,408	83.3%	1.5%
TOTAL WORLD	17,110	17,414	16,557	15,827	16,093	100.0%	1.7%

Source: Ceramic World Review

TOP CONSUMPTION COUNTRIES

In 2020, world tile consumption resumed its upward trend, climbing from 15,650 to 16,035 million sqm (+2.5%), although it remains at the lowest levels of any time in the last 7 years. Almost all areas saw a recovery. In Asia, demand rose to 11.4 billion sqm (+2.8%), equivalent to 71.5% of global consumption. In Europe, consumption increased in both European Union countries (1,035 million sqm; +1.4%) and non-EU European markets (563 million sqm; +11.3%). In the Americas

consumption remained almost stable, standing at 1,249 million sqm in Central and South America (-1%) and 541 million sqm in North America (-0.6%). Demand in Africa also increased, reaching 1,124 million sqm (+1.4%).

All the other areas lagged well behind: non-EU Europe exported 32.4% of its output volumes, North America 12.8%, South America 12.2%, Asia 11.6% and Africa just 8.8%. The import/export flow dynamics increasingly confirm the trend

for tiles to be produced close to markets.

The European Union remained a partial exception with 45.3% of its exports sold in non-EU markets. This analysis is confirmed by the fact that the shares of world production and consumption tend to be similar in each continent. Asia accounted for 74% of production and 71.5% of world consumption, Europe (EU + nonEU) 11.6% and 10% respectively, the Americas 8.8% and 11.2%, and Africa 5.7% and 7%.

TOP CONSUMPTION COUNTRIES							
COUNTRY	2016 (Sq.m Mill.)	2017 (Sq.m Mill.)	2018 (Sq.m Mill.)	2019 (Sq.m Mill.)	2020 (Sq.m Mill.)	% on 2020 world consumption	% var. 20/19
1. CHINA	9,245	9,244	8,163	7,453	7,859	49.0%	5.4%
2. INDIA	785	861	876	910	885	5.5%	-2.7%
3. BRAZIL	789	765	775	802	829	5.2%	3.4%
4. VIETNAM	412	580	542	467	400	2.5%	-14.3%
5. INDONESIA	369	336	450	413	357	2.2%	-13.6%
6. USA	274	284	289	273	264	1.6%	-3.3%
7. MEXICO	235	242	236	238	242	1.5%	1.7%
8. TURKEY	239	251	236	185	241	1.5%	30.3%
9. SAUDI ARABIA	248	203	176	190	238	1.5%	25.3%
10. EGYPT	215	252	236	239	237	1.5%	-0.8%
TOTAL	12,811	13,018	11,979	11,170	11,552	72.0%	3.4%
TOTAL WORLD	16,859	17,229	16,426	15,650	16,035	100.0%	2.5%

TOP EXPORTING COUNTRIES

In 2020, India not only maintained its position as the second largest tile producer with volumes climbing from 1,266 to 1,320 million sqm (+4.3%), it also overtook Spain as the world's second largest exporter. While the pandemic caused a 2.7% decline in domestic consumption to 885 million sqm, the country's exports continued to grow, rising by 21% from 360 to 437 million sqm. With volumes almost doubling in the space of just four years,

Indian exports now account for 15.8% of world exports and no less than one third of the country's total production. In value terms, exports reached 1,350 million euros, equivalent to an average selling price of 3.1 €/sqm, which remains one of the lowest values amongst all major exporter countries. Saudi Arabia remained India's largest export market with a 20.8% share of total exports and a 24.8% increase in sales from 73 to 91 million sqm. This result

is particularly significant in the light of the tariffs imposed on Indian tiles imported into GCC countries in 2020 and which might have been expected to result in a decrease in exports.

India's sales in its other main export markets also grew strongly: Iraq (23 million sqm; +26%), Indonesia (which did not become an Indian export market until 2018 but where sales reached 22 million sqm; +22%).

Source: Ceramic World Review

TOP EXPORTING COUNTRIES

COUNTRY	2017 (Sq.m Mill.)	2018 (Sq.m Mill.)	2019 (Sq.m Mill.)	2020 (Sq.m Mill.)	% on 2020 national production	% on 2020 world exports	% var 20/19	value 2020 (million €)	average export price (€/sq.m)
1. CHINA	908	854	779	622	7.3%	22.5%	-20.2%	3,602	5.8
2. INDIA	228	274	360	437	33.1%	15.8%	21.4%	1,350	3.1
3. SPAIN	407	414	415	422	86.5%	15.2%	1.7%	2,954	7.0
4. ITALY	338	328	323	318	92.4%	11.5%	-1.5%	4,410	13.9
5. IRAN	148	151	162	179	39.9%	6.5%	10.5%	330	1.8
6. TURKEY	93	101	112	132	35.7%	4.8%	17.9%	686	5.2
7. BRAZIL	90	100	102	96	11.4%	3.5%	-5.9%	289	3.0
8. POLAND	45	43	50	58	43.9%	2.1%	16.0%	361	6.2
9. EGYPT	57	68	66	53	18.6%	1.9%	-19.7%	105	2.0
10. UNITED ARAB EMIRATES	46	42	45	52	65.0%	1.9%	15.6%	161	3.1
TOTAL	2,360	2,375	2,414	2,369	18.5%	85.6%	-1.9%		
TOTAL WORLD	2,789	2,810	2,836	2,769	17.2%	100.0%	-2.4%		

TOP IMPORTING COUNTRIES

In 2020, the 10 largest importing countries imported a total of 1,104 million sqm (up 6.4% on 2019) and accounted for 39.9% of global import/export flows. With the sole exception of Indonesia which imported just 20% of its consumption, in all the other top 10 countries imports covered more than 65% of domestic demand, with peaks of 99.4% in Iraq and between 90% and 95% in France, Germany, Israel and the

UK. While remaining firmly at the top of the ranking of the world's largest tile importers, the United States reported a slight fall in imports to 197 million sqm (-3.4%), in line with the 3.3% decline in domestic demand (264 million sqm) and stable at 74.6% of domestic consumption.

Given the high level of investments being made in the major tile producing countries, further growth can be expected in 2021. China closed the first

half of 2021 with a 14.7% increase in production compared to the first half of 2020; Brazil with +52% (+24% forecast for the whole year); Spain with +34%; Iran with +10% and Mexico with +48% (+18% forecast for the end of the year). Italian production is also expected to bounce back to pre-pandemic levels driven by surging sales amid double-digit growth rates in several key markets in the first half of the year.

TOP IMPORTING COUNTRIES

COUNTRY	2016 (Sq.m Mill.)	2017 (Sq.m Mill.)	2018 (Sq.m Mill.)	2019 (Sq.m Mill.)	2020 (Sq.m Mill.)	% on 2020 national consumption	% on 2020 world imports	% var. 20/19
1. USA	194	202	209	204	197	74.6%	7.1%	-3.4%
2. SAUDI ARABIA	167	131	116	126	167	70.2%	6.0%	32.5%
3. IRAQ	112	129	124	138	161	99.4%	5.8%	16.7%
4. GERMANY	115	109	106	110	123	93.9%	4.4%	11.8%
5. FRANCE	104	112	111	113	114	89.8%	4.1%	0.9%
6. PHILIPPINES	75	82	91	86	77	65.8%	2.8%	-10.5%
7. INDONESIA	57	64	77	72	73	20.4%	2.6%	1.4%
8. SOUTH KOREA	75	78	77	70	69	71.9%	2.5%	-1.4%
9. ISRAEL	57	58	61	60	63	95.5%	2.3%	5.0%
10. GREAT BRITAIN	52	52	51	59	60	90.9%	2.2%	1.7%
TOTAL	1,008	1,017	1,023	1,038	1,104	67.9%	39.9%	6.4%
TOTAL WORLD	2,825	2,789	2,810	2,836	2,769	17.3%	100.0%	-2.4%

Source: Ceramic World Review

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THE BIG PLAYERS IN THE SECTOR

In addition to global tile production and consumption figures, here is the key data on the sector's leading groups and companies, ranked by last year's output volumes and updated to 31/12/2020.

The exceptional nature of the year 2020 is also reflected in the ranking of the world's largest tile producers and warrants

some general observations. Unlike in the past when the ranking remained relatively stable, the 2020 ranking has seen (probably temporary) changes in the positions of numerous companies due to the fact that it is not based on installed capacity but on actual production over the 12 month period.

Almost all groups reported a decline

in production volumes due to the plant stoppages that occurred for various lengths of time during the lockdowns in the first half of the year; this contraction was partially offset by the powerful recovery in the second half of 2020, with production lines operating at maximum capacity in response to a buoyant market.

	Group / Company	Production (mill. sq.m)	Installed capacity	Export share	Turnover only tile segment (mill. €)	Total turnover (mill. €)	Tile plants / Location	Main Tile Brands / Companies
1	MOHAWK INDUSTRIES, INC. USA	230-250 (estimates)	250.0 (estimates)	n.a.	\$ 3,433 mill.	\$ 9,552 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	GRUPO LAMOSA MEXICO	148.0	201.0	38%	602.3	796.8 (tiles, adhesives)	9 in Mexico, 2 in Argentina, 2 in Colombia, 3 in Peru	Lamosa, Porcelanite, Firenze, San Lorenzo, Cordillera, Scop, Princesa, Mallorca, Lamosa USA
3	SCG CERAMICS THAILAND	145.0	181.0	12%	565.0	695.0 (tiles + sanitaryware)	18 in Thailand, 7 in Vietnam, 2 in Indonesia, 1 in Philippines	COTTO, Sosuco, Campana, Prime, Mariwasa, Kia, Trend, Impreso
4	RAK CERAMICS PJSC UAE	99.2	123.0	60%	395.0	575.0 (tiles, sanitary, tableware)	12 in UAE, 1 in Bangladesh, 1 in India	RAK Ceramics, Elegance
5	CERAMICA CARMELO FIOR BRAZIL	84.0	87.0	32%	n.a.	n.a.	5 in Brazil	Cecafi, Pisoforte, Fioranno, Ideale, Arielle
6	GRUPO PAMESA SPAIN	82.0	82.0	69%	617.0	783.0	5 in Spain	Pamesa, TAU, Geotiles, Prissmacer, Ecoceramic, Navarti
7	STN GROUP SPAIN	78.1	81.0	78%	360.0	360.0	3 in Spain	STN, Alaplana, Keratile, Tesany, Vitacer
8	KAJARIA CERAMICS * INDIA	78.1 (sales)	70.4	1%	353.0	377.0 (tiles, sanitaryware)	10 in India	Kajaria
9	ARWANA CITRAMULIA INDONESIA	63.0	65.4	0%	127.6	127.6	5 in Indonesia	Arwana
10	DYNASTY CERAMIC THAILAND	61.0	84.0	4%	222.0	229.0	3 in Thailand	Dynasty, Tile Top, Jaguar, RCI, Chicken, Birdy, Swan, Value
11	GRUPO FRAGNANI BRAZIL	55.3	79.0	9%	93.4	93.4	3 in Brazil	Incefra, Incenor, Tecnogres, In Out
12	CERSANIT SA POLAND	53.5	65.6	70%	258.0	457.0 (tiles, sanitaryware)	2 in Poland, 2 in Russia, 1 in Ukraine	Cersanit, Opoczno
13	SAUDI CERAMICS SAUDI ARABIA	52.8	60.0	1%	221.8	269.5 (tiles, sanitaryware)	14 in Saudi Arabia	Saudi Ceramics
14	SOMANY CERAMICS * INDIA	48.0	67.7	7%	179.0	191.0 (tiles, sanitaryware)	9 in India	Somany
15	LASSELSBERGER GROUP AUSTRIA	44.2	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
16	VICTORIA PLC * GREAT BRITAIN	42.0	50.0	70%	331.8 (GBP 282,4 mln)	778.2 (GBP 662,3 mln) (ceramic tiles, carpet, LVT, ...)	4 in Spain, 5 in Italy	Keraben, Saloni, Ibero-Casainfinita, Serra, Ascot, Dom, Mac3, Keradom
17	KALE GROUP TURKEY	40.0	62.0	38%	n.a.	184.0 (tiles, bathroom, others)	20 in Turkey	Canakkale Seramik, Kalebodur, Edilcuoghi, Edilgres, Campani, IDA
18	CELIMA (TREBOL GROUP) PERU	36-40 (estimates)	54.0 (estimates)	n.a.	n.a.	n.a.	3 in Peru	Celima, San Martin
19	PORTOBELLO (PGB) BRAZIL	36-40 (estimates)	46.0 (estimates)	21%	208.4	208.4	2 in Brazil	Portobello, Pointer
20	INTERCERAMIC MEXICO	36.0	48.0	29%	310.0	431.0 (tiles, sanitaryware, others)	5 in Mexico, 1 in USA	Interceramic
21	CERAMIC INDUSTRIES SOUTH AFRICA	35.0 (estimates)	49.0	n.a.	n.a.	n.a.	5 in South Africa, 1 in Australia	Samca, Vitro, Pegasus, Gryphon, Centaurus
22	VITROMEX MEXICO	34	50.2	n.a.	143.0	143.0	4 in Mexico	Vitromex, Arko
23	ELIZABETH BRAZIL	32.1	51.2	4%	132.0	132.0	4 in Brazil	Elizabeth
24	ORIENT BELL INDIA	32.0	35.0	-	55.0	55.0	5 in India	Orientbell Tiles
25	CORONA COLOMBIA	31.6	42.0	12%	111.2	331.9 (tiles, sanitaryware)	5 in Colombia	Corona, Orchid

*) Figures refer to FY ended on March 31 or April 3, 2021

Source: Ceramic World Review



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Works :

Panchkula - (Haryana)
Ahmedabad - (Gujrat)
Veleru - (Andhra Pradesh)

Works: 198, Industrial Area, Phase-I,
Panchkula-134113, Haryana
Ph.: +91 172 5040351
Email : panchkula@floorexfrits.com

Works: Plot No. 19, Aneri Industrial Park,
Near Super Gas, Vill. Ranesar - Taluka - Bavla
Distt. - Ahmedabad Gujrat (India)
Contact No. : 09501111318
Email : ahmedabad@floorexfrits.com

Works: Survey No. : 567/2B, Veleru,
Bapula Padu-Mandal, Krishna-District,
Andhra Pradesh, 521105
Mobile : 98769 00351, 92164 32078
E-mail : andhra@floorexfrits.com,
panchkula@floorexfrits.com

Email : info@floorexfrits.com

Website : www.floorexfrits.com

Setting a Benchmark

KE Ranganathan, Managing Director, Roca Bathroom Products Pvt Ltd. in the exclusive interview with **ICCTAS** spoke about Roca's expansion plans, product innovations, market growth, popular collections, export volumes and much more



Roca is a company dedicated to the design, production, and marketing of bathroom products for architecture, construction and interior design. Founded in 1917, it combines tradition and knowledge with a passion for innovation and respect for the environment with the aim of meeting people's needs and contributing to the improvement of society's well-being. With sustainability present in all its production processes and with the commitment to help preserve a better planet for future generations, Roca has implemented this philosophy in the 170 countries in which it operates and in its 84 factories and transmits it daily to its more than 24,000 employees. The family company is the market leader in Europe, Latin America, India and Russia. It also has a strong presence in China and the rest of Asia, the Middle East, Australia and Africa. As a result, it is a world leader in its business.

In conversation with KE Ranganathan

How has the year 2021 been for your brand? What growth have you attained compared to the year 2020?

The year 2021 began on an excellent note

for us. We were well prepared since 2020 mid on both, the manufacturing, and the marketing front to meet the increasing demand for our products offered across our brands (Armani Roca, Laufen, Roca, Parryware & Johnson Pedder).

ROCA Parryware achieved all time high revenues for the year 2021 and this is I would say is the combined result of years of planning and our excellent execution, backed with complete trust by our dealers and consumers. We witnessed a direct impact of our customer centric actions including new product launches, our network expansion initiatives at retailer level and adding new showrooms across markets. We also gave a big thrust on the loyalty program for our trade partners and provided continuous support to our plumbing technicians. We also created an industry-first digital marketplace through the launch of "Parryware Safebuy" platform.

On the back end, we ensured that all the Covid preventive measures across our 8 factories and vendors are strictly implemented resulting in achieving the production volumes.

Looking at the peaking demand we have now started investing in capital expen-

diture at our factories to further expand our capacities for sanitary-ware products, faucets, and plastic products. We are also stepping up our marketing investments in the form of mass media campaign and showrooms.

Describe the design philosophy of Roca?

Roca is committed to design and innovation and has always been a reference point for innovative products and technology is design. Roca collaborates with internationally renowned designers and architects to develop our products and collections. Some of the famous designers like Antonio Bullo, David Chipperfield are the pioneer designers of Roca products. Roca also draws instances from nature for its collection. The latest launch of Roca, the ONA collection is designed with the Mediterranean touch.

What are the most popular collections at Roca right now?

At Roca, we believe in exclusive design and all our designs are unique both functionally and aesthetically. Some of these designs are celebrity level magnificent and breathtaking. Roca with its world class Roca Design Center is constantly innovating and introducing unique products, which provide the best possible solutions. With the rising trend of designer bathroom spaces that showcase opulence and reflect one's personality, we launched the Red Dot award-winning Ruy Ohtake Basins. This is a unique offering from Roca for Indian customers, and we are thrilled to offer this iconic collection to them that boasts of architectural styling and exclusive high-quality materials.

We recently also announced a series of smart bathroom products to create a touchless ecosystem in the washroom. We introduced a series of sensor-based faucets, EP2 Sensor-based Flush plates to minimize the contact in the bathroom

space, and Parryware's Verve WCs collection, Roca's exclusive Supralit seat covers to prevent any microbial transfers through touch. Additionally, we have also introduced a series of smart tech products like smart shower, innovative and sensor-based mirrors like Roca Prisma and Iridia Mirrors and an exclusive range of Roca's user-friendly water closets, washbasins and bath that includes latest technology and new optimized design for greater hygiene and ensure a comfortable bathroom experience.

Our PVD collection of colored faucets are which is very high on sustainability using process which is 100% eco friendly, which also means the manufacturing process is costly when compared with competition. But given the ROCA Groups high interest on environment, every product made from ROCA strictly complies with sustainable process with over all groups objective of carbon foot print reduction.

What excites you most about the changing design trends in the bathroom industry? And how is Roca playing a role in the revolution?

In today's time, safety and hygiene have become the most crucial concern for an individual and feeling safe about the hygiene of public places has now gained more attention than how it was before the pandemic. People now want products that involve minimum human touch and perform the functions through sensor-based technology. Touch free bathrooms have begun receiving a lot of attention in the hygiene space. Unsurprisingly, the pandemic has prompted the accepted acknowledgment towards inventive and smart innovation regardless of small or enormous sized washrooms.

Roca, in this segment has been catering to the demands of the consumers in a very organic style by introducing smart products that do not require any human touch, are tech driven and are able to provide the consumers a very comfortable and relaxed experience, ensuring the achievement of maximum safety and hygiene in the bathroom. Roca's wide range of faucets, flush plates, water closets, mirrors and many more products with sensors and touchless technology eliminates the direct hand contact and maintains cleanliness throughout their use.

In the mirror section, Roca has intro-

duced products like Roca Prisma and Iridia Mirrors that are now adapting to the new demands with added sensors to avoid physical contact and LED lights that allow users to fully appreciate every detail. The anti-fog plate offers a neat and clean view throughout the use.

In terms of water closets, Roca has introduced a series of smart and user-friendly water closets like In-wash Inspira, In-wash Alba, In-wash Atis and many more products that ensure a comfortable and hygienic experience for the consumers. Besides these, Roca has also launched the Beyond Unlimited collection which includes water closets, washbasins, and bath. All the products are equipped with the latest technology and optimized designs for greater hygiene. The Beyond Bath includes extremely malleable material, is more sustainable, well insulated and has a twin lever deck-mounted-bath-shower mixer.

Functionality or aesthetics...which according to you is more important.

Both are equally important. You cannot ignore the fact that if a bathroom lacks in any of these parameters, it will not be able to stand-up to the required level of comfort and hygiene. The aesthetic design of a bathroom space is where minds tend to wander when we hear "Stylized Bathroom." There is a common universal design elements that bring a level of fulfillment. We work extensively with the superstars of the Italian design industry and have created collections and products that appeal to our consumer base.

Roca is market driven but we believe that there should be space for experimentation and an element of surprise. A bathroom should not just be soothing to the eyes but also make the user feel comfortable. Once you have functionality you can add the other factors to it, be it sustainability, color scheme or any other aesthetic elements. Looking at the current scenario, our focus has been on sustainability and technology. We offer a wide array of products that help achieve that. Our Beyond Unlimited Collection is an ode to comfort in this regard. Smart showers and Tech driven Mirrors are also a definite must-have product in the wish-list and provide a comfortable experience.

Can you tell us about your export

volumes? From where you see maximum demand?

On the export front, we are seeing a significant increase in demand from United States, Australia, and Europe. Our exports quantities have been rapidly increasing. In response to the increased demand, we have begun investing in the capital expenditure at our plants to enhance our capacity for sanitaryware, faucets, and plastic goods. I am proud to say that ROCA being a worldwide group present in 185 countries, the products made in factories of ROCA India is exported to around 50 countries worldwide.

What is the market share that you have currently versus the unorganized players and how much will your market share increase going forward?

We enjoy the position of market leaders among the top players in the industry. Our market share differs state wise as well. For example we have a huge market share in TN and south especially.

Roca has been part of many promotional activities and has received many prestigious awards all over world? How does it feel and what responsibility does it holds?

Roca is known for highly innovative products and always promotes design and innovation. These awards not only show how those Indian designs are winning accolades worldwide but are also a symbol of motivation and keep on reminding us how much more hard work is required to be needed in the future to achieve a greater sense of accomplishment and success. The awards that Roca has won in the past have reinforced the fact that the company has always been at the forefront of providing innovative solutions to all bathroom worries and making it a room of experience for all.

What are your expansion plans for the year 2022?

We continue to invest in our market development activities which are very essential for the presence and growth of the brand. We also plan to expand in the Tier 2 and Tier 3 cities aggressively this year. More the brand equity, more the customer base the brand would enjoy.

www.roca.com

Growth Ahead

Sarat Chandak, CEO & Executive Director, H&R Johnson (India) Division, talks to **ICCTAS** in an exclusive interview about business, digital innovation, market trends and future development

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.

In conversation with Sarat Chandak

How do you see the year 2021 and what impact did it have given the second wave of the pandemic? What are your expectations for the year 2022?

The year 2021 was a watershed moment for the entire world and our industry was no exception. The pent-up demand post the 1st wave and the subsequent building up of new investment in real estate and commercial spaces was just around the corner when the second wave hit us. Business on one side and the people, their families and above all sentiments on the other, we did manage to come out strongly. Truly, performance has no barriers whatsoever, whether the confines of homes or offices. With the backdrop of digital transformation, the only prime most important factor is sharp customer focus. The underlying faith and trust of all our stakeholders is our sanctum sanctorum.

2022 is again a year where uncertainty does linger, we have just come reasonably unscathed from the 3rd wave, and we find the inflationary trends are looming large on the horizon and hitting us hard. On one

side, government impetus is given to investments and on the other the uncertainties, endemic or challenges of Oil and gas, environmental upheavals and geopolitical turmoil. We are constantly adjusting and balancing these opposing forces which impact business performance.

We continue calibrating with nimble footedness as the speed of implementation and faster response enabled by digital transformation is the key to ride the situation.

At what capacity are you working currently, and do you plan to scale further?

We are currently working with a capacity of 64 million sq.m per annum and we have ambitious plans for the future.

Our Eastern Region plant is the first in the industry in that part of the country. This 5.5 million sq.m per annum capacity is slated to commence in 23-24. We continue our plans to be a strong part of equitable growth across the country.

We plan to build a strong presence and foothold in PAN India manufacturing and cater to demand from all parts of the country.

Can you tell us about your new investment plans for the year 2022?

We stand committed to investing and implementing state of the art machinery in all our plants bringing them on par with appropriate international standards. We have already initiated the modernising project in 3 of our south-based plants. Keeping in mind our objectives of servicing our customers PAN India, we at some point in time would evaluate options of setting up a plant in the northern region. Apart from tiles, we are also evaluating options of setting up a Sanitary ware



plant at an appropriate location.

Are you planning to launch any new products in your bath-ware division in the year 2022?

Our Bathware division continues to work on providing a comprehensive product range to our consumers, serving their requirements with best-in-class quality products at various price points. Today consumers show a greater preference for hygiene products, and accordingly, Johnson Bath Division (JBD) has introduced Germ-Free Range in FY'21. We also have plans to scale up with products across categories. The market is consolidating for products with minimalistic design; accordingly, we have focused on the Wall Hung category, Detachable Seat Covers, Behind the wall Installation products etc.

Which new products are you planning to launch in tiles? Can you share some details with us? Are you planning to scale up your production capacity in this market and what challenges do you face, if any?

We plan to launch product variants in all our verticals viz Johnson, Marbonite,



Porselano and Endura with an interesting play of thickness, size and innovative designs. We have options of larger size formats keeping with the trend of customer preferences and tastes. We have already launched a slew of special application oriented products which include Cool Roof (SRI) Tiles, Max-grip (R series), Tactiles, Anti-static tiles and Germ-free tiles. Apart from the home living spaces, we also have terrace tiles, exterior cladding tiles, steps & risers and landscaping tiles to name a few. Industrial tiles have been our forte and we have the entire range with varied thicknesses to cater to the needs of the manufacturing sector within our country.

Our plans to scale up capacities are impacted by the environmental conditions and the ongoing geopolitical situation. Notwithstanding that, we continue to be optimistic and see only minor hiccups to our plans.

Are you planning to scale up your business in the international mar-

ket? What are your expectations from there? Throw some light on your exports?

The international market has opened and warmed up to our country. Our industry is in a sweet spot particularly with the twin advantages viz adoption of technology and competitive labour costs. Today, India stands No.2 in the World manufacturing facility and exports close to 27% of our capacities across all parts of the world. HRJs exports are touching more than 40 different countries and we are considered a favourable exporter by many partners particularly in Europe and Americas. Our quality standards and our commitment will help us stand in good stead.

How do you see the future of the Indian ceramic tiles & sanitaryware industry in the coming years?

The Ceramic tile & Sanitaryware industry per capita consumption will closely mirror the path of India's growth story. The development and trickle down effect in sync

with the increase in per capita income in our country will be a strong driver for our industry. This will propel a strong growth path. We look at the future with a lot of optimism with India's Growth Story and the path to reaching the top 3 in terms of PPP in the world.

One of the significant drivers and employment generators for our economy is the Building and Construction industry. The government measures which provide housing for all in the affordable range is likely to be a big boost to our sector. Pradhan Mantri Awas Yojana schemes, the state housing board schemes and promotions will all be adding to the overall demand situation. The various road and highway projects envisaged, the opening of the logistics corridors and other infra boost is likely to spur demand for PAN India. We are extremely optimistic about the coming years and would be a significant contributor to India's growth story.

www.hrjohnsonindia.com

Smart Strides

Kajaria made a major investment in **SACMI Continua + family's** smartest product **PCR2120**

India's leading player Kajaria Ceramics has made a major investment decision that takes the Group into the high-end slab and tile sector. Versatile, repeatable quality with outstanding productivity and the lowest energy consumption on the market, these are the hallmarks of the PCR2120, the latest addition to the SACMI Continua+ family, now selected by Kajaria as it seeks to become a key player in the high-end slab and tile segment.

The country's number one and seventh globally in terms of output volumes, Kajaria joins forces with Continua+ technology after an astonishing 33 year history marked by constant investment with Sacmi in innovation and service. Their success has given them leadership of the domestic market and made them major exporters to Europe and the United States. Technology, research, qual-





45.970611876410764%

ity and design, points out Ashok Kajaria, owner and founder of the company, now run together with his sons Chetan Kajaria and Rishi Kajaria, have been in Kajaria's DNA ever since its founding. We've always adopted the latest available technologies, looking ahead to boost the quality and appeal of our products and the efficiency of our factories. Hence their decision to go for SACMI Continua+, the world's leading technology with over 100 solutions sold on 5 continents.

This purchase, a PCR2120, will be up and running by next spring at the South Plant, in Tirupati one of ten Kajaria Group production plants located across the country with the head office in the capital New Delhi. Specifically designed for the market's most popular formats from 60x120 to 120x240 cm and relative sub lines sizes the highest performing machine is out-

standingly compact and offers, with such sizes, a sound alternative to even to the highest-performing traditional presses.

Compared to a discontinuous press, in fact, Continua+ provides unparalleled versatility as regards settings, thanks also to the in-line TPV on-the-fly cutting solution supplied by BMR. Equipped with upstream APB0 and DMS feeders, the machine is designed to provide, once fully operational, an output of 3.5 million square meters per year in various sizes and thicknesses.

Moreover, it features the lowest scrap levels in the category (always < 3%, regardless of product size) and fully recycled, thanks to the integrated suction and recovery system. Another key aspect of this purchase of particular importance on the Indian manufacturing market, which is recovering fast but also being impacted

by high energy costs is the 5 tier SACMI dryer, which has an effective width of 2850 mm and a length of 47.6 meters.

Next come the 25.3 meter pre kiln and the new 210 meter HTE295 kiln, a next gen machine with a full complement of systems that retrieve hot air from the kiln and send it to the burner pre-heat area or dryer. Energy efficiency solutions play an increasingly pivotal role in SACMI tile making technology and are now a priority for many customers as they seek to maximize both quality and output capacity by acting decisively on the factory's energy balance. Last but far from least, this PCR has the lowest specific consumption on the market, just 0.06 kWh per square meter against 80 km of installed power.

www.sacmi.com
www.kajariaceramics.com

Sanitaryware Market Forecast

Know about the world sanitaryware market export and import growth and its leading countries

The world ceramic sanitaryware import and export grew by 53% from 2.16 million to 3.3 million tonnes over the period 2010-2020, corresponding to a compound annual growth rate of 4.3%.

The positive trend that lasted for almost the entire decade came to a halt in 2020, the year of the pandemic, when exports fell by 5% compared to 2019. This downturn was observed in practically all geographical areas of production. Asia further consolidated its position as the largest world sanitaryware exporter, maintaining its share of world exports at 62.6% despite a 4.8% fall to 2.1 million tonnes. This decline was

the combined result of contractions experienced by all the major Asian exporters, namely China, India, Thailand and Vietnam.

Talking about the exports from the European Union, the world's second largest exporter, also fell by 9.7% to 489,000 tonnes. The 6.5% increase recorded in Poland (which has become the largest sanitaryware exporter in the EU at 83,000 tonnes) was not sufficient to compensate for the declines in Germany (-5.6%) and Portugal (-19.8%).

The only area of the planet where sanitaryware exports remained in positive ter-

ritory was North America (NAFTA), which reached 368,000 tonnes (up 0.7% on 2019), almost entirely shipped from Mexico. After a decade of steady growth, in 2020 exports from non-EU European countries also fell slightly for the first time (-0.8% to 235,000 tonnes), despite a fresh increase in exports from Turkey. Next came South America (79,000 tonnes, -9.2%) and Africa (64,000 tonnes, -14.5%), both of which also recorded a drop in exports.

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

THE TOP EXPORTING COUNTRIES (TONS)

	2010	2013	2014	2015	2016	2017	2018	2019	2020	% 20/19	CAGR 20/10	% on 2019 world exports
China	901,962	1,015,513	1,280,270	1,335,212	1,238,558	1,378,951	1,532,833	1,747,579	1,698,152	-2.8%	6.5%	58.9%
Mexico	226,569	268,502	276,984	295,439	322,169	326,289	342,666	335,958	333,230	-0.8%	3.9%	11.6%
India	15,076	134,255	119,626	119,752	135,776	137,717	182,691	199,371	171,698	-13.9%	27.5%	6.0%
Turkey	94,354	119,602	125,256	120,613	127,065	140,759	154,285	164,809	166,370	0.9%	5.8%	5.8%
Thailand	57,189	68,107	75,794	79,242	81,016	86,512	96,067	92,094	87,129	-5.4%	4.3%	3.0%
Poland	67,572	70,890	69,913	77,048	80,323	76,620	78,617	77,470	82,537	6.5%	2.0%	2.9%
Germany	63,742	56,560	58,343	65,734	79,124	75,478	81,952	80,382	75,861	-5.6%	1.8%	2.6%
Portugal	75,049	68,525	78,360	87,434	93,891	94,164	101,654	81,574	65,438	-19.8%	-1.4%	2.3%
Vietnam	19,590	42,750	57,424	47,892	35,034	40,457	41,292	52,982	51,986	-1.9%	10.3%	1.8%
Russia	2,033	11,995	14,373	25,119	34,111	33,935	36,614	41,589	43,226	3.9%	35.8%	1.5%
TOTAL	1,523,136	1,856,699	2,156,343	2,253,485	2,227,067	2,390,882	2,648,671	2,873,808	2,775,627	-3.4%	6.2%	
% on total world exports	70.5%	73.0%	74.6%	77.2%	76.9%	78.6%	79.6%	82.6%	84.0%			

THE TOP IMPORTING COUNTRIES (TONS)

	2010	2013	2014	2015	2016	2017	2018	2019	2020	% 20/19	CAGR 20/10	% on 2020 world imports
USA	500,415	585,081	624,259	683,754	690,500	738,424	811,329	817,814	836,998	2.3%	5.3%	25.3%
Germany	107,509	111,505	128,532	142,391	147,060	140,282	148,431	150,424	144,298	-4.1%	3.0%	4.4%
United Kingdom	103,815	116,765	138,337	147,323	145,992	151,904	138,454	143,344	118,205	-17.5%	1.3%	3.6%
Korea Republic of	84,543	99,658	115,816	132,361	147,756	142,706	142,732	142,658	127,185	-10.8%	4.2%	3.8%
France	115,108	107,797	104,078	101,819	107,421	116,870	125,738	135,313	125,197	-7.5%	0.8%	3.8%
Canada	104,680	104,119	109,559	104,119	108,442	106,137	103,682	107,464	107,013	-0.4%	0.2%	3.2%
Spain	83,634	70,745	82,755	88,245	93,758	89,036	108,096	104,972	86,835	-17.3%	0.4%	2.6%
Saudi Arabia	33,592	71,593	71,623	83,934	67,918	58,100	51,814	74,034	82,497	11.4%	9.4%	2.5%
Nigeria	28,500	50,765	61,460	59,144	40,579	48,514	57,134	83,503	80,044	-4.1%	10.9%	2.4%
India	26,982	24,656	32,655	32,423	37,010	46,585	56,161	66,021	45,796	-30.6%	5.4%	1.4%
TOTAL	1,188,778	1,342,684	1,469,075	1,575,513	1,586,436	1,638,558	1,743,571	1,825,547	1,754,067			
% on total world imports	55.0%	52.8%	50.8%	54.0%	54.8%	53.8%	52.4%	52.4%	53.1%			

have almost doubled from 1.1 to 2.1 million tonnes (CAGR 2020/2010 +6.5%). Asia's percentage share of global exports has risen from 51% in 2010 to the current figure of 62.6%, winning shares from almost all the other regions.

The 2020 ranking of the top 10 exporter countries saw Italy exit and Russia enter in tenth place (up 3.9% on 2019), while several other countries changed positions. Only 3 countries saw an increase in sanitaryware exports compared to 2019. China continued to top the rankings in 2020 with 1.70 million tonnes (up from 902,000 tonnes in 2010, equivalent to a CAGR of +6.5%), despite seeing the first decline (down 2.8% on 2019). China alone accounted for 82% of Asian exports and 59% of world exports. Mexico, the second largest exporter country with an 11.6% share of global exports, suffered a 0.8% fall in its exports in 2020 to 333,000 tonnes, again bringing to an end a decade-long growth trend. Despite a 13.9% contraction on 2019 to 172,000 tonnes, India remained in third place followed by Turkey with 166,000 tonnes (up 0.9% on 2019) and Thailand, while Poland overtook Portugal, Germany and Vietnam to reach sixth place in the ranking.

Overall, the 10 largest sanitaryware exporter countries accounted for 84% of global exports. An analysis of 2020 imports to the various continents not only confirms Asia, North America and the European Union as

the three regions accounting for the majority of sanitaryware imports but also reveals that they are almost level in terms of imported volumes: North America at 986,000 tonnes (29.8% of global imports, +1.9% on 2019); Asia at 890,000 tonnes (26.9% of global imports, -8.9% on 2019); and the EU at 837,000 tonnes (25.3% of global imports, -8.4% on 2019). Imports to Africa (-7.8%) and South America (-9.3%) also fell, while imports from non-EU European countries grew by 10%. The 2020 rankings of the 10 largest sanitaryware importing countries remained almost unchanged with respect to the previous year. Just two out of ten countries (USA and Saudi Arabia) recorded an increase in imports. Overall, the ten largest sanitaryware importers account.

In 2020, the United States was once again the world's biggest sanitaryware importer with 837,000 tonnes (2.3% up on 2019). It retained a strong lead over all other importer countries with 25.3% of world imports, as well as almost all (85%) of imports to the NAFTA region. This marks the continuation of a longstanding record considering that in 2010 the USA imported more than 500,000 tonnes, 23% of world imports. Germany remained stable in second place with 144,000 tonnes of imports (down 4.1% on 2019), followed by the United Kingdom (118,000 tonnes, -17.5%), Korea (127,000 tonnes, -10.8%), France (125,000 tonnes, -7.5%), Canada (107,000 tonnes, -0.4%),

Spain and Nigeria. Saudi Arabia bucked the trend with double-digit growth in imports (82,000 tonnes, +11.4%), while India saw a 31% contraction (46,000 tonnes). India and Germany rank among both the top 10 exporters and the top 10 importers of sanitaryware. India is a net exporter (it imports 46,000 tonnes and exports 172,000 tonnes), while Germany is a net importer (it imports 144,000 tonnes and exports 76,000 tonnes).

One final point of interest is the analysis of the main export destinations with respect to the geographical areas of production. Four out of seven areas sell the vast majority of their exports within their own geographical regions or continents: 96.6% of North American exports remain in the NAFTA region; 98% of Oceania's exports remain in Oceania; 84% of the European Union's exports are sold in EU markets; and 73.6% of South American exports are shipped to other Latin American countries.

At the other extreme, 88% of exports from non-EU Europe are sold in other regions, particularly the EU (Turkey's largest export market). Likewise, 70% of African exports are sold outside Africa and Asia ships 57% of its exports outside the Asian continent thanks to the ability of China and India to reach almost all areas of the world.

Source: Ceramic World Review



Inspo Art

Hindware, through its new collection **NEOM** tiles brings together the most unique and creative inspirations one can incorporate from the art world, along with the upcoming interior trends for the year 2022

NEOM Tiles by Hindware has an ongoing campaign Inspoart, which shows how to creatively use tiles in interior design that one should try in 2022. The thought behind the campaign is to express people's love towards art by decorating their home in their own artistic versions and visions. They want their homes to look like the art that inspires them the most. NEOM brings this vision to life with its premium tiles. It shows how homes can look like paintings by famous artists that people have always been inspired by.

Are you planning to give your home a modern upgrade? If you are then you must consider creating unique artwork with tiles. Tiles are now no longer just a functional item to provide a sturdy and clean surface but can be used innovatively to create pieces of art on the floor, wall or other surfaces. When it comes to decorating your room a little bit of tile can go a long way, they can make the biggest impact on a space. The options today are endless, here's a new take on how to style classic, modern, fresh patterns, as well as tiles with unconventional

shapes.

Cubism Artworks

In Cubism artworks, objects are analyzed, broken up and reassembled in an abstracted form, instead of depicting objects from a single viewpoint. Cubism is an abstract form of depicting objects with a fun play around of shapes and colors. Similarly, you can use tiles in different shapes/patterns/colors to depict Picasso's cubism art. This would work really well with your living room which is the heart of the house that





tells a lot about the people living in it.

Tiles Inspired by Frida Kahlo and Mexican Art

There are many tiles which have flowers or leaves or floral patterns on them. If you're looking to create a tile artwork inspired by Frida Kahlo you must take a look at Décor tiles from Neom, Hindware. Each tile is an inspiration from an artist.

For the coming year, geometrics aren't going anywhere, but interior design trends are embracing, vibrant patterns and bold colors. You can experiment with shapes and color and get inspired by cubism artwork to transform the entire vibe of the room.

Overall, we recommend combining the shape with other tiles, like a natural effect finish marble or wood, or throwing in some hotel luxe features, like metallic accents or bold color hot for next year.

www.hindwarehomes.com



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ZAMEEN SE JUDEY

Future Innovations

Innovation is the only way to conquer the future, says **TorreCID Group**. Since its beginning, **TorreCID Group** has based its philosophy on leadership, innovation and globalization

TorreCID was founded by Don Federico Michavila Pallares, a small frit and glaze company in Alcora on August 15, 1963, with the support of his father, Dr. Federico Michavila Paus, a local doctor. TorreCID Group, with the aim of causing change through global leadership in innovation, generates new solutions and future trends capable of providing the best competitive advantages and the greatest added value to its customers.

New Product Innovations

This commitment to offer the most avant-garde and advanced products on the market has led to the development of important innovations that have revolutionized the sector. Among the most recent, 3DCID stands out, an application capable of giving



the ceramic piece a three-dimensional effect, providing volume, depth and realism; MateryCID and ShapeCID, pioneers in the realization of more natural and material digital reliefs; RainbowCID, a family of high color rendering inks without harmful substances for health; MicroCID, a highly versatile finishing solution that can be combined with other effects and innovations; Flakes of numerous colors, sizes and applications capable of reproducing the naturality of stones, granites, terraces; BacteryCID, an antibacterial solution suitable for all ceramic surfaces and 2mattCID, a new collection of ultra-matte and smooth-textured enamels.

All these innovations represent a continuous quantitative and qualitative advance in the STYLE-CID® product line, in charge of combining the most innovative technology with high-level aesthetics, with the aim of creating unrepeatable atmospheres through which the customer

lives. a unique experience. With STYLE-CID®, it has gone from a monotonous ceramic, with small formats and with a use restricted to kitchens and bathrooms, to a ceramic of large formats, exclusive aesthetics, light, with designs without repetitions and whose scope of application has been seen expanded to furniture, facades, ceilings and a long etcetera. No

other architectural product has had a technological and aesthetic evolution as upward as ceramic, ranking among the most requested materials in emerging construction projects.

Pioneers in Reinventing The Customer Relationship

A year ago the Covid-19 pandemic

paralyzed the world. Torrecid, staying true to its philosophy, continued working, innovating and staying by the side of its clients, convinced that, without a doubt, innovation is the only way to conquer the future. To do this, using the latest advances in communication technologies, a system of personalized remote presentations and virtual fairs was created, pioneers



in the sector, in which the client had the opportunity to experience innovation very closely, with a product especially designed for him and providing him with all the facilities for its implementation. When the pandemic allowed it, the planned path was continued, with all kinds of prevention and safety measures, by celebrating the most important international events of 2020.

A Green Company, Always With The Customer

Faced with other approaches aimed at obtaining short-term economic results, Torrecid has always opted for closeness to the client based on a long-term relationship, which means continuously investing in technology, innovation, development and care of the human team, global planning

and future, etc. With a solid Company Culture that does not change over time, Torrecid remains by the side of its clients, both in good times and in crises, sharing with them a clear Objective: Conquer the future through Innovation.

Environmental Commitment

Another of its great pillars is environmental commitment. Torrecid carries out an arduous and continuous task of research and development of innovative solutions that respect the environment and its most direct surroundings. Among them, ECOINK-CID® stands out, the first Full Digital water-based system on the market with which the emission of organic compounds into the atmosphere is drastically reduced and facilitates cleaning and waste management, and the 2lowINKCID inks, which emit low emissions and odors and can be used in conventional printers and heads. In short, the objective of the Group is to continue evolving and growing together with its clients both in the ceramic sector and in many others in which it is already present.



www.torrecid.com

Stylish Yet Affordable

Duravit's new collection of designer bathrooms, is simple, manageable, and good and has everything that a contemporary bathroom needs

Duravit AG, a leading international manufacturer of designer bathrooms is today active in more than 130 countries worldwide and stands for innovation in the fields of signature design, comfort-enhancing technology and premium quality. In cooperation with an international network of high-profile designers such as Philippe Starck, Sieger Design, Christian Werner, Cecilie Manz, and young talents such as Bertrand Lejoly and Kurt Merki Jr., the company develops unique bathrooms that enhance the quality of life for users on a sustained basis. Their product portfolio comprises sanitary ceramics, bathroom furniture, bathtubs and shower trays, wellness systems, shower-toilets, tap fittings and accessories as well as installation systems.

Duravit's complete bathroom range is ideal for any bathroom. Their latest series impresses with its minimalistic and contemporary yet timeless looks, a compact, clear and comprehensive product range, and excellent value for money in the entry-level segment. Whether in your very first bathroom, in a rental apartment, in a hotel bathroom, or generally in the project segment: all products stemming from its



new inhouse design enhance the quality of daily life. They open up a whole host of combination options, creating the perfect foundation for a range of bathroom plans and requirements.

Washbasins That Simplify Planning

The rectangular shape of the washbasins and the narrow design of the side edge

produce a large inner basin – with a generous, comfortable tap panel – that exudes elegant serenity. Bathroom concepts in the budget price range are usually dominated by round shapes. With the new series, Duravit presents an unusual alternative in planning-friendly dimensions. Washbasins, as well as handrinse basins can optionally be combined with pedestals, semi-pedestals, or vanity units. In addition



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



SANITARY WARE



CERAMIC TABLE WARE



FLOOR TILES



PORCELAIN TILES

furniture and built-in washbasins are available.

Practical Furniture

The minimal overhang from the washbasin to the bathroom furniture underlines the clarity and modernity of the design, as does the recessed grip, which is “seamlessly” integrated into the decor fronts and is pleasant to touch. Available in White Matt or Graphite Matt, the furniture has been designed to enable easy retrofitting at a later stage. Vanity units with a hinged door are available for the handrinse basins (450 and 500 mm), and furniture with a pull-out compartment and on request with an additional, practical internal drawer can be selected for the washbasins (550, 600, 650 and 800 mm). A semi-tall cabinet affords generous storage options. Matching mirrors and mirrored cabinets impress



with long-lasting and energy-saving LED lighting and clever details. All furniture is supplied pre-assembled and fully adjusted, enabling quick and convenient final installation with minimal effort.

Universal Faucets

The stylish faucet range has a harmonious and balanced design. The handle, with its dynamic upward-facing position, feels pleasant in the hand and underlines the high-quality aesthetics. The wash basin mixers impress both in terms of quality and function with their long-lasting ceramic cartridges, subtly integrated

aerators, and sustainable product features: they are optionally available with Fresh-Start (energy-saving cold-water start) or MinusFlow (throughput limited to 3.5 l/min).

Comfortable Bathtubs

A further highlight in this price segment is the trapezoid built-in bathtub made from sanitary acrylic, which is available in three sizes and with the option of corner left or corner right versions. The bathtub enables a luxurious bathing experience with a comparatively low filling volume even on smaller floor plans - two people

can also lie side-by-side, depending on the size of the bathtub.

Rectangular built-in bathtubs in all standard sizes complete the range; the 1800 x 800 mm model is available as a two-seater. With depths of 40 or 46 cm, the bathtubs are guaranteed to be comfortable whether sitting or lying. This experience can be enhanced yet further by the optional whirl function with its beneficial massage effect. Bathtub handles, which can be ordered separately and are installed at the factory, improve safety.

www.duravit.in

Embodied In Nature

Architect Siddhina Sakla of **The Arch Studio** gives us a peek into **'Muted Home'**, situated in **Pune**, which features a home design, embodied in a modern aesthetic that balances durability with a soft, sophisticated color palette

Architect Siddhina Sakla of The Arch Studio gives us a peek into this 'Muted Home', situated in Mundhwa, Pune. This sanctuary of simple interiors and tranquil elements with modern, muted color palette evokes a tone that is fresh and serene. With spaces customised to serve different purposes, the design amalgamates functionality with chic aesthetic value.

The Arch Studio is a young multi-disciplinary design studio, offering Architecture and interior design solutions for residential, commercial, hospitality and retail projects. They offer feasibility studies of plots to developers to know the viability of the land. Head by Architect Siddhina Sakla, who completed her Bachelor's in Architecture from Dr.B.N.College of Architecture, Pune, India and then pursued her Master's in Urban Design at Sheffield University, UK. Alongside, she also completed some modules at the University of Westminster, London, UK.

She worked with eminent architects like Christopher Charles Benninger Associates, Pune, India and Nasser Gulzari Architects,

London, UK, which specialises in sustainable Architecture in Palestine and also designed the parliament for Palestine. She devised her own design language through her varied experience in architecture and interior across London and Pune.

Her latest project 'Muted Home' delves into the creative designs and customization of different functional spaces in the home. Equipped with unique design elements, the space is further elevated with the use of large windows and recessed lighting. Our work from home space is the perfect solution for anyone who needs a little extra space to work. The dining space is accentuated with a large mirror on one wall and a beautiful painting on the other. The fully equipped modular kitchen has ample space and accommodates an inbuilt microwave and oven. The bathrooms provide a very subtle palette making the space feel larger than life. The three bedrooms have unique characteristics.

While the guest bedroom accommodates a study space, the other one provides a large dresser. The master bedroom is high-



lighted with a large mirror and wardrobes with inbuilt handles. This home embodies a modern aesthetic that balances durability with a soft, sophisticated color palette. Large windows, recessed lighting and unique elements elevate the whole space.

Living Room

The project features a modern design language and a muted color palette. The living room of this project exudes a welcoming charm with a simplistic arrangement of



the seating area. The space is highlighted with golden accents and a large window.

Dining Space

This space includes a range of customized design elements, tailored to suit various needs of the occupants. The dining space is accentuated with a large bespoke mirror with bevelled edges complemented by a veneer panel below continuing the grooves. A large dramatic painting accentuated the other wall.

Work From Home Space

This home space is the perfect solution for anyone who needs a little extra space to work. This compact, convenient unit is expandable and fully customisable. This space can be used for various activities like



meditation, play room, additional storage space, music room and many more.

Kitchen

The fully equipped modular kitchen has a sleek minimalist aesthetic, with a palette dominated by neutrals and touches of indoor foliage. It makes sure to provide ample space around the room while accommodating an inbuilt microwave and oven.

Master Bedroom

This project design includes a range of customized design elements, tailored to suit various needs of the occupants. The master bedroom features a neutral color scheme with pops of rich green. This makes the upholstery and the gorgeous painting stand out in the space. The patterned wall and golden light fixtures are also set to capture one's attention. The room is completed by the wardrobe with inbuilt handles.

Guest Bedroom

This bedroom has been customised to lay emphasis on the study space provided. The unit is compact but expandable, and hence provides a convenient solution to the issue of tight work spaces. The dual toned colour palette is simple, with an air of sophistication. The yellow tones brighten the otherwise monotone look of this room and pair well with the magnificent art piece on the wall.

Washrooms

The bathroom incorporates a neutral color scheme, with simple geometrical elements. The elevated sinks are a simple, but elegant fixture. Little artificial plants are strategically placed to help brighten the space.

Powder Room

The powder area constitutes a subdued neutral color scheme, accompanied with a large spherical mirror. The single light fixture above the mirror is a tasteful solution that ensures ample light for the elevated sink as well.

Property Facts

Location: Mundhwa, Pune
 Area: 1500 Sq.ft
 Type: Residential
 Photography: PHX India



thearchstudio.co.in

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Kajaria Eternity presents the biggest tile in the Ultima range with 1200X2400 MM size. Inspired by the beauty of nature this Ultima tiles create a sense of grandeur and space you can only get from the extra-large premium tiles. Available in two elegant finishes (Polished & Matt) that bring out the classic patterns, they're perfect to add style and sophistication to any space. It's easy to install and has high abrasion resistance. Give your home the gift of grandeur.

www.kajariaceramics.com

ASIAN GRANITO

Asian Granito new bathware series NERO, a shower mixture, from their bathware collection gives a natural water fall look as well as flow. This series comes with the artistic design and black finish, which gives a touch of elegance and beauty. Its fine craftsmanship and superior technology makes this series more durable for the bathroom.

www.aglasiangranito.com





RAK CERAMICS

RAK Ceramics has introduced Aaron collection, ideal for outdoor space. Sustainable and adoptable, this collection is ideal choice to design and revamp gardens, pivots, terrace, and driveways, parking areas or pool edges. Its special textured surface and tile design makes it highly appealing for outdoor space. With higher thickness of 15mm, it has extremely high resistant to loads and traffic. It also has higher wear and abrasion resistance. It comes with R10 level of slip resistance and is easy to clean and maintain with better stain resistance.

www.rakceramics.com



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Hafele brings to you Dekton, world's first ultra-compact surface manufacturer which offers you unique surfaces created through an innovative combination of minerals found in nature. Designed to be the toughest and the most durable surface, Dekton has the ability to fit into and redefine a multitude of applications - flooring, cladding, and facades for both inside and outdoors. The exclusive Ultra Compacting Technology imitates and enhances the metamorphic changes that natural stone undergoes over millennia through exposure to high pressure and high temperature. Moreover, with its high resistance to ultraviolet (UV) light which prevents it from fading or degrading over time, this surface is perfect for outdoor use.

www.hafeleindia.com





ORIENTBELL TILES

Orientbell Tiles has launched an exclusive range of tiles - Inspire 800X1600mm. It is an extension of the INSPIRE series. This tile has been crafted with diligence keeping design differentiations as the key to match the developing consumer needs. They come in super gloss, gloss and matte options, to cater to the demands of all kinds of consumers, architects, interior designers and builders. With its soothing colors, textures and the subtle designs, these tiles are suitable for both flooring and the walls in your living room, hall, bathroom, kitchen, balcony as well as in malls, hospitals, restaurants and office spaces.

www.orientbell.com

KHOLER

Kohler in collaboration with contemporary artist Daniel Arsham has launched a one-of-a-kind limited-edition 3D-printed sink entitled Rock.01. Comprised of 3D-printed vitreous china and hand-poured brass, the sink's vessel blends modern-day technology with Kohler's nearly 148-year manufacturing legacy into what can only be described as functional high art. The effects of time are reflected in the patina of the brass "rock" and achieved through a forced coercion process. Rock.01 melds the future of 3D-printing technology with the most basic methods of hand-cast brass.

www.kohler.co.in





Rajesh Kumar Jain
MANAGING DIRECTOR
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VITRA

Vitra has launched Liquid - a new range designed in collaboration with acclaimed British designer Tom Dixon. This range offers basins, taps, showers, toilets, furniture, tiles and accessories which work together or as stand-alone pieces. Its round edges, generous shapes, and timeless designs give a sophisticated look to your bathroom space. Liquid is Tom Dixon's first bathroom collection and is beautifully crafted with precision. The bones of this range are the all-white ceramics, offset with signature chunky brassware in either gloss black or classic chrome finish.

www.vitra-india.com

GROHE

GROHE has launched the new GROHE Plus Digital faucet which offers a new level of ergonomic comfort and practical function. The GROHE Plus Digital faucet comes with an LED temperature display, so you know the water will always be just the right temperature. This innovative faucet puts control and convenience in your hands with features like water-saving spray, LED display and temperature control allowing users to tailor water temperature precisely to their needs. The display changes colour from blue to red on a spectrum depending on water temperature for maximum safety. It turns smoothly to the left and right, adding a whole new level of convenience to your bathroom. Whether your bathroom is a space of timeless elegance or minimalist styling, the two variants are always a perfect fit. It is available in two sizes M and L.

www.grohe.co.in



TECHNOLOGY NEWS

Know about the latest launches in technology and machinery brands

System Ceramics Pioneers the Evolution of Digital Decoration

Innovation has always been the byword guiding System Ceramics towards technological evolution and Creadigit Infinity is its digital decoration flagship. The latest-generation digital printer, Creadigit Infinity is equipped with excellent computing power developed thanks to the collaboration with System Electronics, which has taken care of the electronics part with the development of the CoreXpress platform, the processing unit – one for each bar – which governs all the operations.

The information for the reproduction of the image on the ceramic surface is, in

fact, analysed and managed in real time, and the 12 or more bars, each one of which can house different heads, allow for a truly vast range of graphic effects.

A remarkable computing capacity leads to a significant increase in performances, effectively fulfilling the requirement for a collaborative digital printing in which the production process becomes even more flexible and variable. These results can be further enhanced thanks to the combination with Creavision e-View, the new vision and self-regulation device developed by System Ceramics for even better-performing digital printing which, besides enabling processing improvements, is able

to resolve those printing anomalies that cause slowdowns during the tile production process with a consequent increase in costs.

Positioned at the entrance to the printer, Creavision e-View verifies the exact position of the tile on the belt, allowing for a correct repositioning of the graphic image on the support to be printed. Thanks to the new fixed full-view reading set-up, with a wider range of view, the entire roller is covered, making it possible to have a complete view of the tile. This means greater precision, more speed and improved productivity, with minimal manual interventions.

www.systemceramics.com



SITI B&T to Develop Hydrogen-Powered Kilns

SITI B&T Group is stepping up its research efforts with a focus on new hydrogen-based technologies to help ceramic producers embrace the energy transition. After making all its kilns hydrogen ready, in 2021 SITI B&T took a further step forward with the launch of a research project to develop kilns powered by a mixture of traditional fuels and hydrogen. The company's ambitious goal is to develop eco-friendly carbon-free firing technology within the next three years so as to further reduce the use of fossil fuels and cut atmospheric emissions. In the meantime, soaring natural gas prices have made it vital for ceramic producers to reduce their

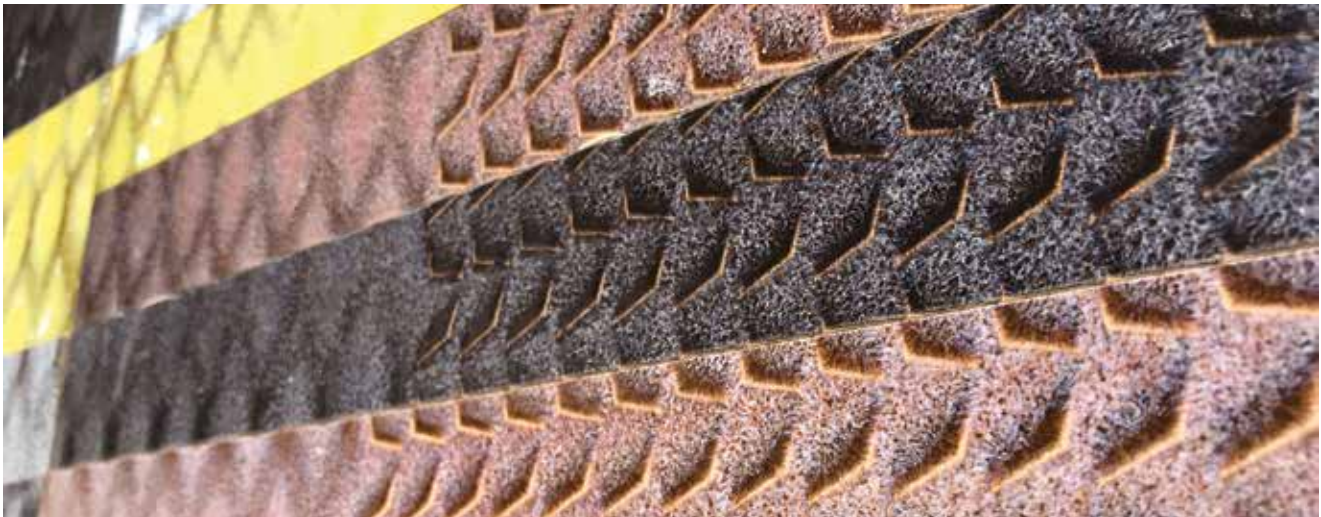
energy consumption in the shortest possible time. For this purpose, SITI B&T offers highly energy efficient solutions such as its Titanium kilns which guarantee a more than 30% reduction in fuel consumption.

These performance levels are demonstrated by the experience of one of Europe's largest ceramic tile manufacturers, which has reported a drastic reduction in consumption and annual savings of more than €700,000 after replacing a conventional kiln with a double-channel Titanium kiln. More than 100 Titanium kilns have been installed since their launch, more than half of which are in Europe and the rest in other major world markets, primarily Brazil, Russia, Central America



and Asia. To immediately improve the efficiency of kilns currently in operation, including a number of very old models, customers can choose SITI B&T's range of Vulcan burners capable of reducing natural gas consumption by between 8% and 10%.

www.sitibt.com



FORMA Plus by Colorobbia - "The Present and Future of Ceramics"

FORMA Plus by Colorobbia - "The Present and Future of Ceramics" presented new project based on years of R&D work presented by Colorobbia Group last year in Cersaie 2021 and in the group's showroom in Fiorano Modenese.

The project consists of a series of visually striking collections in which material effects, textures, reliefs and microreliefs become the key elements of floor and wall tile finishes.

FORMA Plus (Premium Range Products) is a comprehensive range of digital glazes, grits, microgrits, spray-dried glazes and digital effect inks that can be used to create highly realistic stone, marble and wood designs in a wide variety of finishes without affecting the technical characteristics of the finished products.

One of the highlights of the FORMA Plus range is the Neogrits Collection of

grits/microgrits, which can be used to create material and three-dimensional effects before and/or after digital decoration. Whether applied at selective points or over the entire surface of the tile, they are capable of creating any kind of structure or microstructure, even on smooth surfaces.

Neogrits Collection is also compatible with the new range of gloss and matt finish digital glazes developed for the most challenging industrial conditions. The SPS (Special Particle Size) series effect inks are another FORMA Plus Premium Range product.

Applied as Graffiti (water repellency) and sinking effects, they integrate perfectly with the glazes and protective coatings developed specifically to enhance this kind of surface. Thanks to the synchronised graphics, this set of materials can be combined in such a way as to modulate the textures and reliefs over the entire surface of the tile, regardless of its size. But FOR-

MA Plus is more than an ordinary product range, it also incorporates concepts of design, production efficiency and sustainability.

For example, it is complemented by the EkO Inks series of low-emission inks, while a further series of digital inks intended to meet the growing demand for eco-friendly products in certain markets is in the final stages of development.

Colorobbia Group believes high laydown digital glazing is one of the technologies likely to see the greatest development in the short to medium term and with this in mind has already obtained approval for its FORMA Plus set of digital glazes ahead of market demands. In addition to digital glazing, Colorobbia aims to promote the use of its effect inks in finishes, for which purpose it is developing a new series of these inks which will allow the heads to apply a greater quantity of ink to the tile.

www.colorobbia.com



TRADE EVENTS

EXPO REVESTIR

8 - 11 March 2022

Sao Paulo, Brazil

en.exporevestir.com.br

MARBLE IZMIR FARE

30 March - 2 April 2022

Izmir, Turkey

www.marble.izfas.com.tr

COVERINGS

5 - 8 April 2022

Las Vegas, USA

www.coverings.com

INDIAN CERAMICS ASIA

6 - 8 April 2022

Gandhinagar, India

www.indian-ceramics.com

INDIA BUILDTECH 2022

7 - 10 April 2022

New Delhi, India

CERAMICS CHINA

17 - 20 May 2022

Guangzhou, China

www.ceramicschina.net

SALONE DEL MOBILE MILANO

7 - 12 June 2022

Milan, Paris

www.salonemilano.it

CERAMITEC

21 - 24 June 2022

Munich, Germany

www.ceramitec.com

CERAMIC & BATH INDUS- TRY SHOW

30 June - 2 July 2022

Mumbai, India

www.ceramicandbathshow.com

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