Large format durable tiles for an added grandeur. Also available with Anti-Abrasion Patented VC Shield Technology.

Available in: 400mmX800mm, 600mmX600mm, 600mmX1200mm, 800mmX800mm, 800mmX1200mm, 800mmX1600mm, 1200mmX1200mm, 1200mmX2400mm

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Presenting an overview of the global tile industry with statistics.

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CHAIRMAN’S MESSAGE

The Indian tile industry is expected to experience a positive shift over the coming years. This shift is being contoured by various government initiatives, favorable demographics, growing aspirations and increasing affordability which are expected to drive demand for tiles over the coming years, say’s Chetan Kajaria, Chairman, ICCTAS

Ceramic and Vitrified tiles have been a part of the building environment for many years and continue to find a place in even our most contemporary buildings. With multiple inherent benefits like low maintenance, high durability, affordability and an array of options to choose from, tiles have gained popularity and have become a unique product with various advantages over other conventional products, making it more desirable and popular.

The Indian tile industry, the world’s second largest, is one of the most cost efficient and producing tiles in line with international standards.

The size of the Indian tile industry at the end of March 2019 is estimated to be 1145 million sq. meters roughly valued at Rs. 28,500 crores out of which the export were 275 million sq. meters. Domestic consumption is 750 million sq. meters which is roughly valued at Rs. 21,000 crores.

For the last 2 years, the Indian ceramic tile industry has been passing through a dull phase due to a challenging phase of our economy. The 2nd quarter was one of the slowest for the industry due to low consumer sentiment, tight liquidity and excessive rainfall /floods in the country.

Going forward, I sense that positive sentiment should emerge in the tile industry due to start of the festive season from end of September and the recent announcement by the Honorable Finance Minister for setting up of a ‘Special Window’ in the form of Alternative Investment Fund (AIF) with an initial corpus of Rs.25,000 crores to provide funding to the stalled housing projects which would help in reviving the real estate sector after a prolonged slowdown in the housing sector.

ICCTAS, as a council provides a great opportunity for all responsible members to utilise this platform and promote ceramic tiles. There is a need to educate the customers and ICCTAS, will make sure to do so with numerous programmes that will skill the masons and contractors as well as end users in the near future.
Publisher’s Note

In this ICCTAS edition, we have presented the latest trends, news and current scenario of the global ceramic tile industry. We also have the world consumption and production data 2019, with the top consumption countries, top exporters, importers, manufacturers and big players of the last year of the ceramic tile industry worldwide. Leading ceramic tile brands like Somany, H&R Johnson, Qutone and RAK Ceramics shares insight on the current trends and market scenario. They have also shared their knowledge and brand’s contribution in uplifting the ceramic tile industry worldwide. Also, we have authored article by Kartik Kajaria, giving an overview of global marketing practices in the tile industry in between India and UK. In the Architect’s take section interior designer Anish Motwani gives shares design ideas and showcases its latest residence project.

This year end issue gives an overall insight of the Indian ceramic tile industry current developments and its reach globally. We hope you will enjoy reading it!

Thank you.

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

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

TOP MANUFACTURING COUNTRIES

World tile production fell by 3.6% in 2018 with respect to the previous year to reach 13,099 million sq.m. Production in Asia accounted for 68.6% of global output, dropping from 9,473 to 8,980 million sq.m (down 5.2% on 2017). This negative growth was determined by a sharp fall in production volumes in China, only partly offset by growth in India, Vietnam, Indonesia and Iran. The European continent produced a total of 1,984 million sq.m (15.1% of world production).

<table>
<thead>
<tr>
<th>COUNTRY</th>
<th>2014 (Sq.m Mill.)</th>
<th>2015 (Sq.m Mill.)</th>
<th>2016 (Sq.m Mill.)</th>
<th>2017 (Sq.m Mill.)</th>
<th>2018 (Sq.m Mill.)</th>
<th>% on 2018 world production</th>
<th>% var. 18/17</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. CHINA</td>
<td>6,000</td>
<td>5,970</td>
<td>6,495</td>
<td>6,400</td>
<td>5,683</td>
<td>43.4%</td>
<td>-11.2%</td>
</tr>
<tr>
<td>2. INDIA</td>
<td>825</td>
<td>850</td>
<td>955</td>
<td>1,080</td>
<td>1,145</td>
<td>8.7%</td>
<td>6.0%</td>
</tr>
<tr>
<td>3. BRAZIL</td>
<td>903</td>
<td>899</td>
<td>792</td>
<td>790</td>
<td>793</td>
<td>6.1%</td>
<td>0.4%</td>
</tr>
<tr>
<td>4. VIETNAM</td>
<td>360</td>
<td>440</td>
<td>485</td>
<td>560</td>
<td>602</td>
<td>4.6%</td>
<td>7.5%</td>
</tr>
<tr>
<td>5. SPAIN</td>
<td>425</td>
<td>440</td>
<td>492</td>
<td>530</td>
<td>530</td>
<td>4.8%</td>
<td>0.0%</td>
</tr>
<tr>
<td>6. ITALY</td>
<td>382</td>
<td>395</td>
<td>416</td>
<td>422</td>
<td>416</td>
<td>3.2%</td>
<td>-1.7%</td>
</tr>
<tr>
<td>7. INDONESIA</td>
<td>420</td>
<td>370</td>
<td>360</td>
<td>307</td>
<td>383</td>
<td>2.9%</td>
<td>24.8%</td>
</tr>
<tr>
<td>8. IRAN</td>
<td>410</td>
<td>300</td>
<td>340</td>
<td>373</td>
<td>383</td>
<td>2.9%</td>
<td>2.7%</td>
</tr>
<tr>
<td>9. TURKEY</td>
<td>315</td>
<td>320</td>
<td>330</td>
<td>355</td>
<td>335</td>
<td>2.6%</td>
<td>-5.6%</td>
</tr>
<tr>
<td>10. EGYPT</td>
<td>220</td>
<td>230</td>
<td>250</td>
<td>300</td>
<td>300</td>
<td>2.3%</td>
<td>0.0%</td>
</tr>
<tr>
<td>TOTAL</td>
<td>10,260</td>
<td>10,214</td>
<td>10,915</td>
<td>11,117</td>
<td>10,570</td>
<td>80.7%</td>
<td>-4.9%</td>
</tr>
<tr>
<td>TOTAL WORLD</td>
<td>12,428</td>
<td>12,475</td>
<td>13,280</td>
<td>13,587</td>
<td>13,099</td>
<td>100.0%</td>
<td>-3.6%</td>
</tr>
</tbody>
</table>

Source: Ceramic World Review
In 2018, India maintained its position as the world's second largest tile producer and consumer country. Production increased from 1,080 to 1,145 million sq.m (+6%), while domestic consumption fell slightly to 750 million sq.m (-1.3%). The ceramic cluster in Morbi (Gujarat) has continued its rapid growth and is now estimated to have more than 500 production lines, many of which are devoted to products for export. Exports have continued to grow strongly, rising from 228 to 274 million sq.m (+20.2%), and consolidating India's position as the 4th largest world exporter country.

<table>
<thead>
<tr>
<th>COUNTRY</th>
<th>2014 (Sq.m Mil.)</th>
<th>2015 (Sq.m Mil.)</th>
<th>2016 (Sq.m Mil.)</th>
<th>2017 (Sq.m Mil.)</th>
<th>2018 (Sq.m Mil.)</th>
<th>% on 2018 world consumption</th>
<th>% var. 18/17</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. CHINA</td>
<td>4,894</td>
<td>4,885</td>
<td>5,475</td>
<td>5,498</td>
<td>4,840</td>
<td>37.8%</td>
<td>-12.0%</td>
</tr>
<tr>
<td>2. INDIA</td>
<td>756</td>
<td>763</td>
<td>785</td>
<td>760</td>
<td>750</td>
<td>5.9%</td>
<td>-1.3%</td>
</tr>
<tr>
<td>3. BRAZIL</td>
<td>853</td>
<td>816</td>
<td>706</td>
<td>708</td>
<td>702</td>
<td>5.5%</td>
<td>-0.8%</td>
</tr>
<tr>
<td>4. VIETNAM</td>
<td>310</td>
<td>400</td>
<td>412</td>
<td>580</td>
<td>542</td>
<td>4.2%</td>
<td>-6.6%</td>
</tr>
<tr>
<td>5. INDONESIA</td>
<td>407</td>
<td>357</td>
<td>369</td>
<td>336</td>
<td>450</td>
<td>3.5%</td>
<td>33.9%</td>
</tr>
<tr>
<td>6. USA</td>
<td>231</td>
<td>254</td>
<td>274</td>
<td>284</td>
<td>289</td>
<td>2.3%</td>
<td>1.8%</td>
</tr>
<tr>
<td>7. EGYPT</td>
<td>190</td>
<td>190</td>
<td>215</td>
<td>252</td>
<td>254</td>
<td>2.0%</td>
<td>0.8%</td>
</tr>
<tr>
<td>8. TURKEY</td>
<td>215</td>
<td>234</td>
<td>241</td>
<td>254</td>
<td>239</td>
<td>1.9%</td>
<td>-5.9%</td>
</tr>
<tr>
<td>9. MEXICO</td>
<td>197</td>
<td>218</td>
<td>235</td>
<td>242</td>
<td>236</td>
<td>1.8%</td>
<td>-2.5%</td>
</tr>
<tr>
<td>10. IRAN</td>
<td>280</td>
<td>190</td>
<td>169</td>
<td>170</td>
<td>230</td>
<td>1.8%</td>
<td>35.3%</td>
</tr>
<tr>
<td>TOTAL</td>
<td>8,333</td>
<td>8,307</td>
<td>8,881</td>
<td>9,084</td>
<td>8,532</td>
<td>66.6%</td>
<td>-5.1%</td>
</tr>
<tr>
<td>TOTAL WORLD</td>
<td>12,132</td>
<td>12,281</td>
<td>12,989</td>
<td>13,295</td>
<td>12,818</td>
<td>100.0%</td>
<td>-3.6%</td>
</tr>
</tbody>
</table>

Source: Ceramic World Review
The three largest exporter countries, China, Spain and Italy, accounted for 58% of world exports in 2018, while the top ten countries made up 85.6%. Amongst the largest exporter countries, Italy and Spain maintained the highest share of exports as a percentage of production (79% and 78% respectively), compared to the 61% of the UAE, the 39% of Iran, the 30% of Turkey, the 29% of Poland, the 24% of India, the 18% of Mexico and the 15% of China.

### TOP EXPORTING COUNTRIES

The table below shows the top exporting countries for ceramic tiles in 2015-2018, along with their production, exports, and export prices for that period.

<table>
<thead>
<tr>
<th>COUNTRY</th>
<th>2015 (Sq.m Mill.)</th>
<th>2016 (Sq.m Mill.)</th>
<th>2017 (Sq.m Mill.)</th>
<th>2018 (Sq.m Mill.)</th>
<th>% on 2018 national production</th>
<th>% on 2018 world exports</th>
<th>% var 18/17</th>
<th>value 2018 (million €)</th>
<th>average export price (€/sq.m)</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. CHINA</td>
<td>1,089</td>
<td>1,025</td>
<td>908</td>
<td>854</td>
<td>15.0%</td>
<td>31.1%</td>
<td>-5.9%</td>
<td>3,756</td>
<td>4.4</td>
</tr>
<tr>
<td>2. SPAIN</td>
<td>378</td>
<td>395</td>
<td>407</td>
<td>414</td>
<td>78.1%</td>
<td>15.1%</td>
<td>1.7%</td>
<td>2,729</td>
<td>6.6</td>
</tr>
<tr>
<td>3. ITALY</td>
<td>316</td>
<td>332</td>
<td>338</td>
<td>328</td>
<td>78.8%</td>
<td>11.9%</td>
<td>-3.0%</td>
<td>4,547</td>
<td>13.9</td>
</tr>
<tr>
<td>4. INDIA</td>
<td>134</td>
<td>186</td>
<td>228</td>
<td>274</td>
<td>23.9%</td>
<td>10.0%</td>
<td>20.2%</td>
<td>859</td>
<td>3.1</td>
</tr>
<tr>
<td>5. IRAN</td>
<td>112</td>
<td>126</td>
<td>148</td>
<td>151</td>
<td>39.4%</td>
<td>5.5%</td>
<td>2.0%</td>
<td>361</td>
<td>2.4</td>
</tr>
<tr>
<td>6. BRAZIL</td>
<td>77</td>
<td>94</td>
<td>90</td>
<td>100</td>
<td>12.6%</td>
<td>3.6%</td>
<td>11.2%</td>
<td>398</td>
<td>4.0</td>
</tr>
<tr>
<td>7. TURKEY</td>
<td>77</td>
<td>81</td>
<td>93</td>
<td>100</td>
<td>29.9%</td>
<td>3.6%</td>
<td>7.8%</td>
<td>506</td>
<td>5.1</td>
</tr>
<tr>
<td>8. MEXICO</td>
<td>61</td>
<td>56</td>
<td>53</td>
<td>46</td>
<td>17.8%</td>
<td>1.7%</td>
<td>-13.2%</td>
<td>237</td>
<td>5.2</td>
</tr>
<tr>
<td>9. POLAND</td>
<td>42</td>
<td>46</td>
<td>45</td>
<td>43</td>
<td>28.7%</td>
<td>1.6%</td>
<td>-4.4%</td>
<td>265</td>
<td>6.2</td>
</tr>
<tr>
<td>10. UAE</td>
<td>54</td>
<td>48</td>
<td>46</td>
<td>42</td>
<td>60.9%</td>
<td>1.5%</td>
<td>-8.7%</td>
<td>171</td>
<td>4.1</td>
</tr>
<tr>
<td>TOTAL</td>
<td>2,340</td>
<td>2,389</td>
<td>2,356</td>
<td>2,352</td>
<td>22.6%</td>
<td>85.6%</td>
<td>-0.2%</td>
<td>1,345</td>
<td>4.1</td>
</tr>
<tr>
<td>TOTAL WORLD</td>
<td>2,746</td>
<td>2,788</td>
<td>2,752</td>
<td>2,749</td>
<td>21.0%</td>
<td>100.0%</td>
<td>-0.1%</td>
<td>1,345</td>
<td>4.1</td>
</tr>
</tbody>
</table>

Source: Ceramic World Review
In 2018, imports to the top 10 importer countries remained stable with respect to 2017 at a total of 1,023 million Esq., equivalent to 37.3% of total world import/export flows. With the sole exceptions of Indonesia, which imported just 17% of its consumption, and Thailand with 31%, imports to the other entire top 10 importer countries accounted for more than 60% of domestic consumption, with peaks of 98.4% in Iraq and between 87% and 94% in France, Germany and Israel.

In 2018 the USA confirmed its status as the world’s biggest importer country with growth in imports from 202 to 209 million sq.m (+3.5%), driven by the 1.8% upturn in demand from 284 to 289 million sq.m. Imports stood at 72.3% of consumption, slightly higher than the previous year in response to the fall in local production (including that of Italian-controlled companies Del Conca, USA, Florida Tile, USA, Landmark and Stone peak), which dropped to 87 million sq.m in 2018 (-4.4%) in the first contraction after 8 years of steady growth. Some 80% of US imports originated from the 4 largest supplier countries: China (64.3 million sq.m, +5.3%), Mexico (35.2 million sq.m, -4.6%), Italy (34.6 million sq.m, -7%) and Spain (33 million sq.m, +23%). Italy remained the market leader in terms of sales value (on a CIF basis) at US $710 million, a 30.9% share of the total value of imports (US $2.3 billion).

In 2018 Saudi Arabia, the world’s third largest tile importer, continued the negative trend that began in 2016. Domestic consumption dropped to 176 million sq.m (down 13.3% on the 203 million sq.m of 2017 and almost 90 million sq.m below the record figure of 2015), prompting a corresponding contraction in both imports (from 131 to 113 million sq.m) and local production (70 million sq.m, -12.5%). India remained the largest exporter to Saudi Arabia (56 million sq.m, -2%), followed by China (17 million sq.m, -31%), UAE (14.3 million sq.m, -3.9%), Spain (14 million sq.m, -33.7%) and Oman (5.8 million sq.m, +18%).

### Top Importing Countries

<table>
<thead>
<tr>
<th>Country</th>
<th>2014 (Sq.m Mill.)</th>
<th>2015 (Sq.m Mill.)</th>
<th>2016 (Sq.m Mill.)</th>
<th>2017 (Sq.m Mill.)</th>
<th>2018 (Sq.m Mill.)</th>
<th>% on 2018 national consumption</th>
<th>% on 2018 world imports</th>
<th>% var. 18/17</th>
</tr>
</thead>
<tbody>
<tr>
<td>USA</td>
<td>164</td>
<td>179</td>
<td>194</td>
<td>202</td>
<td>209</td>
<td>72.3%</td>
<td>7.6%</td>
<td>3.5%</td>
</tr>
<tr>
<td>IRAQ</td>
<td>102</td>
<td>106</td>
<td>112</td>
<td>129</td>
<td>124</td>
<td>98.4%</td>
<td>4.5%</td>
<td>-3.9%</td>
</tr>
<tr>
<td>SAUDI ARABIA</td>
<td>156</td>
<td>188</td>
<td>167</td>
<td>131</td>
<td>113</td>
<td>64.2%</td>
<td>4.1%</td>
<td>-13.7%</td>
</tr>
<tr>
<td>FRANCE</td>
<td>99</td>
<td>99</td>
<td>104</td>
<td>112</td>
<td>108</td>
<td>87.8%</td>
<td>3.9%</td>
<td>-3.6%</td>
</tr>
<tr>
<td>GERMANY</td>
<td>95</td>
<td>100</td>
<td>115</td>
<td>109</td>
<td>106</td>
<td>87.6%</td>
<td>3.9%</td>
<td>-2.8%</td>
</tr>
<tr>
<td>PHILIPPINES</td>
<td>53</td>
<td>60</td>
<td>75</td>
<td>82</td>
<td>91</td>
<td>69.5%</td>
<td>3.3%</td>
<td>11.0%</td>
</tr>
<tr>
<td>INDONESIA</td>
<td>46</td>
<td>45</td>
<td>57</td>
<td>64</td>
<td>77</td>
<td>17.1%</td>
<td>2.8%</td>
<td>20.3%</td>
</tr>
<tr>
<td>SOUTH KOREA</td>
<td>76</td>
<td>72</td>
<td>75</td>
<td>78</td>
<td>77</td>
<td>66.4%</td>
<td>2.8%</td>
<td>-1.3%</td>
</tr>
<tr>
<td>ISRAEL</td>
<td>44</td>
<td>52</td>
<td>57</td>
<td>58</td>
<td>61</td>
<td>93.8%</td>
<td>2.2%</td>
<td>5.2%</td>
</tr>
<tr>
<td>THAILAND</td>
<td>49</td>
<td>56</td>
<td>54</td>
<td>55</td>
<td>57</td>
<td>31.1%</td>
<td>2.1%</td>
<td>3.6%</td>
</tr>
<tr>
<td>TOTAL</td>
<td>884</td>
<td>957</td>
<td>1,010</td>
<td>1,020</td>
<td>1,023</td>
<td>64.2%</td>
<td>37.3%</td>
<td>0.3%</td>
</tr>
<tr>
<td>TOTAL WORLD</td>
<td>2,705</td>
<td>2,746</td>
<td>2,788</td>
<td>2,752</td>
<td>2,745</td>
<td>21.4%</td>
<td>100.0%</td>
<td>-0.3%</td>
</tr>
</tbody>
</table>

Source: Ceramic World Review
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 31/12/2018. Where available we also provide the figures for export share, number and locations for production plants (in the tile segment), and turnover generated purely from the sale of ceramic tiles. This allows for a more even comparison between large groups which often operate in multiple segments of the ceramic industry.

<table>
<thead>
<tr>
<th>Group / Company</th>
<th>Country</th>
<th>Production (mill. sq.m)</th>
<th>Installed capacity</th>
<th>Export share</th>
<th>Turnover only tile segment (mill. €)</th>
<th>Total turnover (mill. €)</th>
<th>Tile plants / Location</th>
<th>Main Tile Brands / Companies</th>
</tr>
</thead>
<tbody>
<tr>
<td>MOHAWK INDUSTRIES, INC.</td>
<td>USA</td>
<td>223.0</td>
<td>223.0</td>
<td>n.a.</td>
<td>5,353 mill. (cement, carpet, laminates, wood, stone, LVT)</td>
<td>5,984 mill. (cement, carpet, laminates, wood, stone, LVT)</td>
<td>23 in USA, Mexico, Brazil, Italy, Spain, Poland, Bulgaria, Russia</td>
<td>American Olean, Dal Tile, KAI, Kerama Marazzi, Marazzi, Regno, Emling, Blaue</td>
</tr>
<tr>
<td>SCG CERAMICS</td>
<td>Thailand</td>
<td>174.0</td>
<td>210.0</td>
<td>15%</td>
<td>687.0</td>
<td>812.0</td>
<td>21 in Thailand, 7 in Vietnam, 4 in Indonesia</td>
<td>Cotto, Suso, Campana, Prime, Marwa, Kiz, Trend</td>
</tr>
<tr>
<td>GRUPO LAMOSA</td>
<td>Mexico</td>
<td>164.0</td>
<td>179.0</td>
<td>40%</td>
<td>651.8</td>
<td>651.8</td>
<td>9 in Mexico, 2 in Argentina, 1 in Colombia, 3 in Peru</td>
<td>Lamosa, Porcelanite, Firenze, San Lorenzo, Cordillera, Scop, Princesa, Mallorca, Lamosa USA</td>
</tr>
<tr>
<td>GRUPO CEDASA/ INCOPISOS</td>
<td>Brazil</td>
<td>88.2</td>
<td>149.2</td>
<td>9%</td>
<td>152.6</td>
<td>152.6</td>
<td>3 in Brazil</td>
<td>Mappop, Cedasa, Vistabell, Lorenza, Incopisos, Vivences, Bellacher</td>
</tr>
<tr>
<td>RAK CERAMICS PJSC</td>
<td>UAE</td>
<td>81.6 (95.0 in 2019)</td>
<td>113.0 (135.0 est. from Jan.'19)</td>
<td>45%</td>
<td>472.0</td>
<td>695.0</td>
<td>14 in UAE, 9 in Bangladesh, China, India</td>
<td>RAK Ceramics, Elegance</td>
</tr>
<tr>
<td>CERAMICA CARMELO FIOR</td>
<td>Brazil</td>
<td>81.0</td>
<td>84.0</td>
<td>22.5%</td>
<td>173.0</td>
<td>173.0</td>
<td>4 in Brazil</td>
<td>Cecafi, Profforte, Fiorano, Idealli, Arielli</td>
</tr>
<tr>
<td>PAMESA</td>
<td>Spain</td>
<td>79.2</td>
<td>79.5</td>
<td>71%</td>
<td>485.0</td>
<td>643.0</td>
<td>6 in Spain</td>
<td>Pamesa Ceramica, TAU Ceramica, Geotiles, Navarti, CTI, Foset</td>
</tr>
<tr>
<td>GRUPO FRAGNANI</td>
<td>Brazil</td>
<td>72.2</td>
<td>74.0</td>
<td>8%</td>
<td>145.0</td>
<td>145.0</td>
<td>3 in Brazil</td>
<td>Incerfa, Inceror, Tecnegres, In Out</td>
</tr>
<tr>
<td>KAJARIA CERAMICS</td>
<td>India</td>
<td>66.3 (sales &gt;80)</td>
<td>68.0</td>
<td>1%</td>
<td>343.0</td>
<td>378.7 (tiles, sanitaryware)</td>
<td>9 in India</td>
<td>Kajaria</td>
</tr>
<tr>
<td>STN GROUP</td>
<td>Spain</td>
<td>65.0</td>
<td>76.0</td>
<td>76%</td>
<td>273.0</td>
<td>273.0</td>
<td>2 in Spain</td>
<td>STN, Alaplana, Keratile, Tesany, Vitacer</td>
</tr>
<tr>
<td>DYNASTY CERAMIC</td>
<td>Thailand</td>
<td>61.0</td>
<td>76.0</td>
<td>5%</td>
<td>210.0</td>
<td>219.0</td>
<td>3 in Thailand</td>
<td>Dynasty, Tile Top, Jaguar, Mustang, Valor, RCI</td>
</tr>
<tr>
<td>CERSANTIT SA</td>
<td>Poland</td>
<td>57.1</td>
<td>65.0</td>
<td>21%</td>
<td>279.0</td>
<td>485.0 (tiles, sanitaryware)</td>
<td>2 in Poland, 2 in Russia, 1 in Ukraine, 1 in Germany</td>
<td>Cersanit, Opoczno, Meissen Keramik, MIE</td>
</tr>
<tr>
<td>SOMANY CERAMICS</td>
<td>India</td>
<td>56.6</td>
<td>62.0</td>
<td>4%</td>
<td>196.0</td>
<td>220.0</td>
<td>9 in India</td>
<td>Somany</td>
</tr>
<tr>
<td>ARWANA CERAMICA</td>
<td>Indonesia</td>
<td>55.7</td>
<td>57.4</td>
<td>0</td>
<td>122.0</td>
<td>122.0</td>
<td>5 in Indonesia</td>
<td>Arwana, UNO</td>
</tr>
<tr>
<td>VITROMEX</td>
<td>Mexico</td>
<td>55.0 (estimates)</td>
<td>57.0 (estimates)</td>
<td>n.a.</td>
<td>n.a.</td>
<td>n.a.</td>
<td>5 in Mexico</td>
<td>Vitromex, Construpiso, Arko</td>
</tr>
<tr>
<td>KALE GROUP</td>
<td>Turkey</td>
<td>50.7</td>
<td>62.0</td>
<td>37%</td>
<td>190.0</td>
<td>235.0 (tiles, bathroom others)</td>
<td>20 in Turkey</td>
<td>Canakkale Seramik, Kalebodur, Edilcotto, Ediligne, Campani, IBA</td>
</tr>
</tbody>
</table>
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.). To provide a more complete picture of group size, we also include total or consolidated turnover, the segments that generated this turnover and the number of employees. The figures were provided directly by the companies themselves or obtained from public sources, and in some cases are based on estimates. However, the rankings are not exhaustive. The lack of sufficient quantity of data means, that a number of groups have been omitted, including the largest Italian group, Concorde Group. Mohawk Industries, Inc. remains firmly at the top of the rankings of the top 25 world groups with a capacity and output to 31/12/2018 of around 223 million sq.m and revenues of $3,553 billion generated in the tile segment (36% of the group’s consolidated revenues). This figure is set to rise in 2019, driven by the expansion in production under way in Russia and the acquisition of Eliane in Brazil in November 2018. In the first half of 2019 the Global Ceramics division posted 3% growth in revenue to $1,856 billion.

The Thai group SCG Ceramics ranks second in terms of output volumes (174 million sq.m, down 7% on 2017), but trails well behind in terms of sales revenues (687 million euros). Mexican group Lamosa follows close behind with a production of 171 million sq.m and revenue of 652 million euros. For Rak Ceramics we are supplying both the data to 31/12/2018 and the increase in installed capacity and production deriving from the start-up of the new large-size slab factory in Morbi, India in January 2019.

Other highlights include the ascent of the rankings by Brazilian group Cedasa/Incopisos, the strong performance of Indian companies Kajaria and Somany and the further improvement made by Spanish groups Pamesa and STN, both of which posted increases in production of 5 million sq.m as well as double-digit revenue growth. Pamesa reached group revenues of 485 million euros (+11.5% on 2017), STN 273 million euros (+13.3%).

<table>
<thead>
<tr>
<th>Group / Company</th>
<th>Country</th>
<th>Production (mill. sq.m)</th>
<th>Installed capacity</th>
<th>Export share</th>
<th>Turnover only tile (mill. €)</th>
<th>Total turnover (mill. €)</th>
<th>Tile plants / Location</th>
<th>Main Tile Brands / Companies</th>
</tr>
</thead>
<tbody>
<tr>
<td>17 LASSELSBERGER GROUP</td>
<td>Austria</td>
<td>48.2</td>
<td>50.5</td>
<td>n.a.</td>
<td>n.a.</td>
<td>n.a.</td>
<td>5 in Czech Rep., 2 in Hungary, 1 in Romania, in Russia</td>
<td>Rakо, Cesarom, ITB-Ceramics, Zalakarema</td>
</tr>
<tr>
<td>18 ELIZABETH</td>
<td>Brazil</td>
<td>43.1</td>
<td>56.0</td>
<td>3%</td>
<td>n.a.</td>
<td>n.a.</td>
<td>5 in Brazil</td>
<td>Elizabeth</td>
</tr>
<tr>
<td>19 CELIMA (Trebol Group)</td>
<td>Peru</td>
<td>42.0 (estimates)</td>
<td>54.0 (estimates)</td>
<td>n.a.</td>
<td>n.a.</td>
<td>n.a.</td>
<td>3 in Peru</td>
<td>Celima, San Martin</td>
</tr>
<tr>
<td>20 WHITE HORSE CERAMIC IND.</td>
<td>Malaysia</td>
<td>41.2</td>
<td>56.0</td>
<td>17%</td>
<td>165.0</td>
<td>165.0</td>
<td>3 in Malaysia, 1 in Vietnam, 1 in Taiwan</td>
<td>White Horse</td>
</tr>
<tr>
<td>21 CERAMIC INDUSTRIES</td>
<td>South Africa</td>
<td>40.0</td>
<td>49.0</td>
<td>18%</td>
<td>n.a.</td>
<td>n.a.</td>
<td>5 in South Africa, 1 in Australia</td>
<td>Gryphon, Pegasus, Samca, Vitro, NCI</td>
</tr>
<tr>
<td>22 INTERCERAMIC</td>
<td>Mexico</td>
<td>40.0</td>
<td>50.0</td>
<td>26%</td>
<td>330.0</td>
<td>452.0 (tiles, sanitaryware, others)</td>
<td>3 in Mexico, 1 in USA</td>
<td>Interceramic</td>
</tr>
<tr>
<td>23 PORTOBELLO (PGB)</td>
<td>Brazil</td>
<td>40.0</td>
<td>46.0 (estimates)</td>
<td>20%</td>
<td>237.6</td>
<td>237.6</td>
<td>2 in Brazil</td>
<td>Portobello, Pointer</td>
</tr>
<tr>
<td>24 H&amp;A JOHNSON (INDIA)</td>
<td>India</td>
<td>40.0 (estimates)</td>
<td>60.0 (estimates)</td>
<td>n.a.</td>
<td>n.a.</td>
<td>n.a.</td>
<td>10 in India</td>
<td>Johnson, Marbonite, Endura, Porselano</td>
</tr>
<tr>
<td>25 CORONA</td>
<td>Colombia</td>
<td>37.2</td>
<td>42.0</td>
<td>8%</td>
<td>160.0</td>
<td>600.9 (tiles, sanitaryware)</td>
<td>5 in Colombia</td>
<td>Corona, Orchid</td>
</tr>
</tbody>
</table>

Source: Ceramic World Review
Focus

Industry Innovations

Kartik Kajaria, shares global marketing practices in the Tile Industry. India and UK, its comparison, background and application.

Tiles, today, are synonymous with diverse flooring and cladding applications across the world for its growing aesthetic appeal. But tile is not a thing of today, it has been creating waves in the mind centuries ago.

The earliest evidence of glazed brick is the discovery of glazed bricks in the Elamite Temple at Chogha Zanbil, dated to the 13th century BC. Glazed and coloured bricks were used to make low reliefs in Ancient Mesopotamia, most famously the Ishtar Gate of Babylon (ca. 575 BC), now partly reconstructed in Berlin, with sections elsewhere.

Further, The Achaemenid Empire decorated buildings with glazed brick tiles, including Darius the Great’s palace at Susa, and buildings at Persepolis.

Relief made with glazed brick tiles, from the Achaemenid decoration of Palace of Darius in Susa.

A tile and its application

The word is derived from the French word tuile, which is, in turn, from the Latin word tegula, meaning a roof tile composed of fired clay. A tile is a thin object usually square or rectangular in shape. Tile is a manufactured piece of hard-wearing material such as ceramic, stone, metal, baked clay, or even glass, generally used for covering roofs, floors, walls, or other objects such as table-tops. Alternatively, tile can sometimes refer to similar units made from lightweight materials such as perlite, wood, and mineral wool, typically used for wall and ceiling applications. In another sense, a tile is a construction tile or similar object, such as rectangular counters used in playing games.

Tiles are often used to form wall and floor coverings, and can range from simple square tiles to complex or mosaics. Tiles are most often made of ceramic, typically glazed for internal uses and unglazed for roofing.

Objective

While the tile and its applications largely remain similar across market places across the globe, this research paper aims to highlight the differentiated marketing strategy across the developed and developing markets. This document is based on the insights I gathered during my internship with Ventures Cera, a tile marketing company based in the UK and the knowledge I possess being part of a family that owns and operates India’s largest tile company.

The European tiles industry

Key Industry Realities

The European tiles industry is poised to register significant growth owing to high demand for ceramic tiles as an efficient building material. The industry has touched global consumption benchmark in 2018 as the second highest consumption base in the world.

As per credible industry inputs detailed by Tiles and Bricks Europe (a highly acclaimed industry association of 22 European Union member states), the ceramic tiles market is estimated to grow at 4.51% CAGR during the period of 2019-27. Growth in volume terms is also slated to remain robust at CAGR 4.39% during the same period. Owing to the upbeat construction activity in the region, a spill over impact is expected in the ceramic tiles industry.

Industry dynamics

Driven by the proliferation in the use of eco-friendly tiles and the booming construction industry, the European ceramic tiles market has significant growth potential. Primarily the market is categorised into applications such as commercial, new residential, residential replacement. In terms of product categorisation there are floor tiles, wall tiles, etc.

The European market is however not completely smooth sailing since it is plagued by raw material price fluctuations that squeeze margins of market participants. The pricing tussle is further accentuated by presence of low-cost alternatives from emerging markets in South-East Asia.

Some of the established brands in the European market include RAK Ceramics, Grespania, Grupo Lamsoa, Ceramiche Atlas Concorde and Kajaria Ceramics among others.

Among the member states in the European market, the German ceramic tiles market has had the highest revenue share contribution both in value and volume terms in 2018.

The UK Market

The Tile Market and its Prospects

The UK is an unusual market by European standards due to the predominance of wall

World production scenario (CY17)
tiles, but attitudes to ceramic tiles for flooring are changing, stimulated by the emergence of wet rooms and some use outside the traditional areas of kitchens and bathrooms.

Per capita consumption of tiles is, however, still the lowest in Europe, and roughly a third of Northern European countries, so substantial potential exists.

International trade is a key element of the market given the low number of UK-based volume manufacturers but high levels of demand. Hence, import penetration rate is estimated at around 70% in 2017 with European producers dominating import supply.

Prospects for the floor and wall tile market into the medium-term remain relatively optimistic with the market forecast to grow to around 7% between 2017 and 2021. Moreover, the ‘openness’ of the UK market to tile imports is unlikely to be reversed into the longer-term given the limited UK manufacturing base.

Patterns and shapes remain a key element of the market with ‘random lay’ decorative tiles for both walls and floors increasingly offered by suppliers.

**Tile marketing and its nuances**

In the UK, there are two tile variants – Ceramic and Porcelain (what we call vitrified in India). The most popular sizes are 30 x 60cm and 60 x 60cm (akin to the Indian consumer’s preference). While majority of the tile demand is for external applications, internal application primarily are under the floor heating in most houses, hence they prefer porcelain owing to its very low water absorption character.

During the severe cold conditions prevailing between November and February, tile laying for external applications reduced drastically; the focus shifts to inside-the-home uses which requires comprehensive planning. For some of the small sizes (10 x 20 mm), laying charges of the tile is more than the cost of the tile itself. Hence the customer opts for the ‘Do-It-Yourself’ (DIY) kits. Ventura sold about 20% of its retail sale through DIY kits.

Tiles imported from India and sold in its original packing garnered little attention. But, when the same ‘Made in India’ product is boxed in Venture Cera boxes, customer confidence increases significantly.

**The Indian tile Industry**

The ceramic tiles industry came into existence about a century ago and has matured over time to form an industrial base. Over the years, the industry has been modernizing through new innovations in product profile, quality and design to emerge as a modern, world-class industry.

During the last two decades, the Indian Ceramic Tile Industry has recorded phenomenal growth in product profile, geographical spread and value-added products. The growth was mainly driven by the transformation of ceramic tiles from being typically hygiene products into adornment and aesthetic solutions for every household.

Currently, India is the 2nd largest producer and consumer of tiles in the world. Morbi, a small industrial town near Rajkot, is the second largest tiles manufacturing cluster in the world and accounts for ~50% of India’s total ceramic tiles production. The region registers a healthy growth in exports owing to the growing demand from overseas countries for Indian products.

The key growth drivers of domestic consumption are low per capita consumption of tiles, rapid urbanisation, increasing disposable income of nuclear families, untapped rural market and stable replacement demand, all of which continue to augur well for the Indian tile industry.

Tile exports are only about 20% of the total Indian tile
production despite being a low-cost product owing to inherent shortcomings and operating inefficiencies in the business model of the Indian tile manufacturers.

In a nutshell
- As of December 2018:
  - Production was 1,145 MSM
  - Consumption was 760 MSM
  - Indian tile export was 274 MSM
  - Indian tile import was 25 MSM
  - Inventory with producers was 136 MSM
- National brands contribute less than 50% of industry.
- The industry has been growing at a CAGR of 8-9% in the last 4-5 years, but has degrown marginally in the last two years.

Key differences between the UK & India

There is a yawning gap between UK and India. Not only from a customer standpoint but also at the dealer level. This gap, according to my estimate is what makes UK a mature market and positions India as a developing market.

Business-Level Differences
A) India manufactures majority of the tiles it consumes; its key competition lies in dumping of tiles (selling prices are lower than cost of production) by other Asian counterparts. In the UK, imports are the key source of tiles.
B) India is a cost-conscious, large-volume market which is one of the primary reasons for the proliferation of the unorganised players; the UK is a quality-respecting market which also appreciates the value of innovation and aesthetics – it allows large brands to sustain their growth momentum
C) In India, the dealers are key decision-influencers. In the UK, the digital platform is increasingly prevalent in decision-making – it allows the branded players to influence customer opinion directly.

Customer-Level Differences
D) Space and people are very expensive resources in the UK. Hence, showcasing tiles in a lavish retail ambience is quite a luxury. Hence, the online model for product showcase and sales is increasingly prevalent. Customers usually order a small sample of the tile that they like on the website, so they get the feel and finish of the tile. Architects and other large consumers ask experts to visit the site and seek suggestions for choosing the right product. For retail sales, customers seek prior appointments for visiting the store which allows the store-owner to manage volumes with optimised resources. But in India, walk-in customers account for more than 95% of the revenue for any dealer. Decision-making and purchase happens only at the traditional brick and mortar dealers showrooms – which over the years have altered from dingy storerooms to plush outlets (akin to jewellery stores). And understandably so. For in India, labour is cheap and land is available in plenty.
E) The customer is pampered for choice. European tile brands showcase the entire concept (wall tiles, mosaic etc.) They provide the same design in many finishes (polished, matt, stone, rustic) and sizes. Indian counterparts, do not provide such a wide platter. More importantly, they do not have multiple finishes available, especially in the same design; this tilts the customer’s preference towards European products. In addition, the Italian and Spanish tiles also have pictures on their websites displaying real life rooms with beautiful tiles and interiors which the Indian brands are yet to follow.
F) The UK customer is significantly more quality conscious and ready to pay extra for improved quality. He is sceptical of India/Asian products and hence prefers to pay higher for the European variants. This I believe, is primarily owing to the legacy positioning of the Asian manufacturers (China and India) as low-cost ‘copy cats’.
G) Government policies in the UK provide impetus to increase off take. Consider this: Home loans in the UK are only 2% per annum, making it affordable to purchase tiles and renovate consumers houses; in India it is between 13-15% per annum, making
the customer think twice before spending money on renovation.

**Dealer-Level Difference**

A) For the UK dealer, procuring tiles from Italy and Spain is increasingly beneficial. And there are important reasons for the same:

- Customer preference is towards European tiles owing to perceived quality and aesthetic superiority.
- Tiles sources from European suppliers arrive in only five days whereas tiles from the Indian counterparts take 3-4 weeks.
- European brands package their tiles in wooden crates which enjoy a resale value for the dealer. The Indian brands send their products in metallic crates – dealers need to incur a cost for their disposal. When Indian brands send their products in wooden crates in line with the European (Italian/Spanish) players, breakage is significantly higher – its dents the dealers business margin.

B) The UK dealer is far more system-oriented. Their discipline allows him to know his business growth more accurately and facilitates superior decision making. For instance, order processing, delivery schedules and inventory is updated every week. This standard is at best an aspiration for the Indian tile dealer.

C) In the UK, freight, being a labour intensive operation, is expensive. Hence deliveries are largely made on a pallet basis (1 pallet = 40 boxes of size 30 x 60 cms). Sale in box format is largely exceptional in nature where the customer is encouraged to collect the boxes from the dealer’s establishment. In India, movement of boxes is the ‘in-thing’, pallets are an exception.

**Conclusion**

My learning’s from my internship experience were immense. My internship not only provided rich insights into the differentiated operating models prevalent in diverse geographies for the same product, it also opened my eyes to business strategies that promise to sustain business success over the medium term.

**Strategic insight:**

Customer experience is of critical importance to the sustained growth of a business. It’s the best marketing strategy. As a positive customer experience, builds brand loyalty and affinity, evangelizes the product/service and leaves positive customer reviews that help business retain revenue and onboard new customers.

**Sectoral learning:**

Despite the product and its application being the same, tile marketing is significantly different in different geographies. While, business in the UK has institutionalised customer experience as its operational DNA, tile marketers in India consider ‘customer experience’ as a decisive value-add, distinguishing it from the otherwise cluttered business space.

**Global positioning:**

Indian tiles, especially from the organised players, clearly meet global benchmarks in aesthetics and product quality but lose to global players owing to its legacy image.

The bottom line then is… for India to make it to the developed world it needs to institutionalise an unwavering focus on customer experience. Because, customer experience management (CXM) is the single most important investment an ‘India brand’ needs to make in today’s competitive business climate.
How has the Indian tile ceramic market evolved over the years?

The Indian Ceramic Market has changed dramatically after 2016 when Qutone introduced iMarble – A Revolutionary Product made with the most advanced Slab Technology from Italy. Qutone was the first company in Asia to adapt to this technology and introduced Asia's Largest Slab 120x240. Thereafter various Indian ceramic manufacturers followed this trend and now a whole new generation of Slab Manufacturers has evolved in India and Indian Ceramic Industry have acquired very significant Global Market share in this domain.

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

The Ceramic Tiles production in India is estimated to be 800 million Sq. Mtr. annually and we are doing around 15 million Sq. Mtr. Since Qutone is most popular and has a strong Brand Presence in niche segment, we lead the Large Format & Premium Tile segment with highest market share in India. We have 23,000 Sq. Mtr. per day production capacity of Porcelain Slabs which is largest in the World. Hence, we persuade to increase our volumes in the upper and mid market segments and continuously enhance our Brand Value rather than increasing the volumes in highly price sensitive products segment.

However, considering the total export of 40 million Sq. Mtr., we have export market share of about 10%, a volume of around 4 million Sq. Mtr. Qutone have played very significant role in not only increasing its own Export Volumes, an attribute of Largest Slab Production, but also have enhanced the image of Indian Ceramic Industry as one of the best import venue for overseas buyers.

Your brand is doing lot of promotional activities in terms of commercial and signing ace actors as the brand ambassadors. How it has benefited the brand?

Of course, we are doing a lot to enhance the Brand Presence and create higher Brand Value for Qutone. As our core focus is to cater to the niche segment, Brand Ambassadors play very vital role in Brand Recall & Brand Connect. Anil Kapoor has been the face of Qutone in the market for 3 consecutive years now and we see that this...
has added a lot of positive elements in our Branding Strategy. Consistency leads to strengthening the Reliability & Trust. Our new brand Evagres has Bahubali fame actress Tamannaah Bhatia. Her persona very well connects with the brand’s tag line “Redefining Grace”. This connect resembles to aesthetics of the product which swiftly percolates in consumers’ mind and influences the buying decision.

What are the current market trends in terms of products and what new products have you launched yourself?
Well the Ceramic market trend was always influenced by Innovation and New Concepts to create contemporary Wall and Floor Décor. The Large Format Tiles are comparatively new and evolving with different Design Styling, Surface Finishes. We are poised to take step forward to surpass the market expectation by introducing certain New Formats, Surface Finishes and Décor Options with new generation printing and glazing techniques. We will be unveiling the New Range of products in coming months as the developments are in advance stage now.

Can you tell us about your export volumes? From where you see maximum demand?
In addition to the statistics that I share here, the most impressive achievement is that we have our footprints in more than 60 countries and we intend to increase the reach to all those regions where we see potential for our products. I can say we are having presence in more than 60 countries and are focusing on the rising markets where the demand is likely to increase for the products we are emphasizing the most.

What is the potential of the Indian ceramic tile industry in the global front?
India is one of the most favorite country for ceramic importers globally followed by Italy and China. The technological advancement that Indian Ceramic Industry have scaled in recent past have improved the export scenario and have opened most of the venues where export potentials are in abundance. Continuous technology upgrade, improved quality and apt product delivery mechanism shall influence the growth volume for Indian ceramic manufacturers.

What role does technology play in making of ceramic tiles and has it been used rightly to come up with innovative products?
Advance manufacturing techniques enables us to Innovate and improve the quality of the product in all aspects. New generation process machineries and production equipment also addresses the industry concerns of having Eco-friendly production process to reduce carbon footprint, improve energy efficiency and provide sustainable developments. The latest Slab Production Systems, advanced digital printing technology, new generation of Frits and Glazes and ultramodern LGV/AGV have helped the ceramic industry to evolve with innovative and efficient products.

What is the market share?

What are your plans for the future?
We are gearing up for next big thing after iMarble. Our emphasis is going to be on value added products, technical solutions, new surfaces and formats to suit the continuously evolving market dynamics.

ICCTAS, as a body is actively working towards bringing changes and recommendations necessary better growth that our industry requires to function at its optimal best? Your feedback and suggestions?
Very recommendable work ICCTAS is doing for ceramic industry and we wish all the best to the entire The Tiles of India team for the future. We compliment the whole team for bringing out rich content and industry insight for the benefit of the community. All the best!!!

www.qutoneceramic.com
Trending In Tiles

The international ceramic industry is very dynamic and we at Somany take pride in leading the trends in the Indian market, says Abhishek Somany, Managing Director, Somany Ceramics, on changing design trends in the tiles industry and its role in the evolution

How did the journey of Somany begin?

Somany Ceramics is an internationally acclaimed organization that specializes in ceramics and allied products segment. In the last four decades, Somany Ceramics has established itself as an unchallenged leader in the Indian Ceramic Industry along with significant presence in Africa, The Middle East, United Kingdom and Russia.

We started with a humble beginning in 1969 with our first plant in Kassar (Haryana) and subsequently in Kadi (Gujarat) followed by joint venture plants, generating a total production capacity of 60 million square meters annually. Somany is a complete décor solutions provider and its extensive range of products include – Ceramic Wall and Floor Tiles, Polished Vitrified Tiles, Glazed Vitrified Tiles, Digital Tiles, Sanitaryware and Bath Fittings as well as Tile Laying Solutions.

We recently launched the French Collection in our bath fittings range which will strengthen our product portfolio and will continue to help us expand our consumer base.

What excites you most about the changing design trends in the tiles industry?

For years, tile was known as the affordable alternative to natural stone. It was a flooring staple largely restricted to kitchens, bathrooms and other water-sensitive areas. Over the last decade or so, tiles have totally taken off entering into all living spaces in the house, beautifully replicating the natural finishes and even expanding into new textures, larger formats and varied shapes.

General perception towards home aesthetic has changed and people have started looking at tiles (floor and
wall) as an important element of their home decor. The international ceramic industry is very dynamic and we at Somany take pride in leading the trends in the Indian market. With the introduction of bigger sizes, digital design-tiles have now started offering both aesthetic value and durability.

We have GVT Tiles under the Duragres brand – “Max” which can give your homes a seamless look with minimal joints and are as big as 1200 X 2400mm. We have been a thought leader in the ceramic industry and our product strategy is led by innovation and design. We have always believed in offering newer products to the customer be it in terms of size, design or different type of finishes continuously.

**Describe the design philosophy of Somany.**

In order to keep abreast with the latest technologies and trends in the industry, we have a dedicated R&D department which is a first of its kind to get recognition by the Government of India. Further, in order to be in sync with global trends, we have collaborated with Italian designers and Spanish designers; and 100% of our designs are imported from Italy and Spain. We are always in sync with the customer’s requirement which is gathered through research. Our design solutions are not only aesthetically pleasing but also functional in nature. We also research about new materials and machinery required for manufacturing of tiles. Our designs are inspired by nature and most of our tiles are close replicas of natural material like marble, stone, wood etc.

A new collection that Somany is currently working on?

Somany has always been at the forefront of design and innovation. We are currently working on multiple new collections, especially bigger format tiles in 800 X 1600mm and 1200 X 1200mm in various finishes like polished, matt and other special application from our new state of the art plant in Tirupati. We also have a special application GVT Tile in a smaller 300 X 600mm format as well as a completely new size of 1200 X 1800mm. Within the Ceramics range of tiles we will be launching a new range in gloss and matt collection. In terms of innovation you will soon see 3D tiles in 600 X 600mm in GVT, and slim tiles with only 5mm thickness in 600 X 1200mm size.

**In terms of innovations, what is Somany’s approach to experimenting with the unknown?**

Somany has always pushed the boundaries of contemporary technology. Our focus is on upholding the highest standards which has helped us to fulfil consumer requirements with products that are truly ahead of the competition. Continuing with this tradition, Somany boasts of two patents as a result of its intensive research namely VC and Slip-Shield tiles.

The revolutionary VC technology solves a very common issue with tiled surfaces, which is abrasion upon long-term use. It shields the tile against weathering – wear and tear, stains and scratches, keeping it fresh and new as ever. These tiles are available in silky matt finishes to bring absolute perfection in terms of beauty and aesthetics. The slip-shield tiles come in varied designs that offer a high co-efficient of friction even in wet condition to avoid slippage. Also, these tiles do not allow dirt to accumulate on the surface.

All our innovations and launches are based on extensive research with benefits aptly suited to every consumer need.

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

In the past, products like ceramics, bathware and sanitaryware were largely bought for functionality. Now that tiles have moved on from being just used in a bathroom for hygiene to a more aesthetically led décor item for living rooms, they have designs have become extremely important part of the overall décor of the house.

Besides offering comfort and aesthetics, tiles offer multiple features like being resistant to moisture and chemical cleaners. It easily meets a large number of requirements, including with respect to abrasion, stains, wear and...
chemical agents.

**What are the most popular collections at Somany right now?**

We have a wide range of products across tiles, bathware and sanitaryware. Some of our popular collections are:

- **Luxury Collection of Tiles comprising of Tesoro and Precious Tile Range and Max Series of Tiles**
- **Goodwood Tiles**
- **Glosstra Collection in wall tiles**
- **French Collection in bathware**

In our bathware range we also have sensor faucets and showers which are based on cutting edge technology in sync with the smart bathrooms of today. In our sanitaryware range we have an exposed glass cistern named “Bastille, this is made from tempered glass with a protective film and has ultra slim cistern for wall hung toilets.

In the premium segment we have French collection which has faucets in 8 different series, ranging from basin faucets, wall mixers, diverters and showers, along with LED showers, mirrors and accessories. In this collection we also have The Prada Series in Black & Rose Gold, Chanel Series in Sheer Gold finish and the Jazz & Odette series of fittings which have been awarded the prestigious Reddot & IF Design award.

**What are the cornerstones of the perfect flooring option?**

In terms of interior design, the unsung hero is flooring. While you often hear people notice how much they love paint or furniture, the floor covering tends to fade into the background and becomes a supporting character.

While choosing a suitable flooring option, the selection hinges on 4/5 parameters:

1. You should also ensure that it blends with your home’s decor. Choose something that will help your home's design scheme and flow effortlessly from one room to the next without appearing jarring or confusing to the eye.
2. **1. Space/area will decide what size to choose from for e.g. for kitchen a tile of size 600X600mm is considered good enough, however for a large living room hall one can go for large format tiles like 800 X 1200mm or even bigger.
3. The colour of the tile - for example dark coloured tiles tend to make a space feel smaller while large, light coloured tiles open up spaces and make them feel bigger.
4. **The Design/patterns can be chosen basis the space for example for living room one can use our Goodwood tiles that look strikingly like real wood and are far more durable and moisture-resistant.
5. **Texture of tiles can play a key role in defining the right look of your room for example using tiles in stone or marble finish can lend a feeling of grandeur in your living rooms.

We at Somany have the largest collection of tiles and have multiple options for our consumers across varying price segments with unique functionality and style to cater to the needs of the discerning consumers.

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Divine Decor

Interior Designer Anish Motwani’s recent residence project gives a picturesque view of a dream house with simple yet unique design and unusual colors.

Anish Motwani, Interior Designer and Founder of Anish Motwani Associates based in Mumbai, has always stayed true to their motto “making sense out of Space” we tried to give meaning to each space and made it part of the larger picture.

The designer has recently completed a beautiful residence project which is simple yet very unique. The idea was to play with different colors than the usual color palette of brown beige. We used grey, white and blue to break the monotony and gave the living room and dining area an upbeat with the unique color palette. Also, the most important was the flooring, which was done in white patterned glossy tiles in size 48 x 32.

The living area has two separate sit-out areas with one side of the seating has two big tall chairs with cushioned two-seater sofa, also having a window space near this seating is also cushioned to accommodate more guests. The other side of the living area has two grey three-seater leather sofa from Rolf Benz with a smart black glass centre table.

The bar display area and the crockery unit counter at dining section of the house is made with white crystal onyx and lends a good amount of illumination. The passage ceiling which runs from entrance up to the living area is the main highlight of the house and is a true delight. The ceiling is mix of wood, mirror and MDF.

The powder room in black Italian marble with mango
onyx gives a look of illuminated lights. The Mandir is made all white with back painted glass and ducco. It has niches which are made in pyramid pattern with one-watt spot-light in them for keeping idols. The client has lots of idols in different sizes which they wanted to see in the mandir.

From turning a new apartment or house into a cozy stylish contemporary home, finding and creating a very personal style of the client, exploring new trends, investing into favorite pieces for a lifetime has always been Anish Motwani’s passion. From home decor accessories, lamps, stylish tables and wall decoration to incredible pieces of advice, Anish Motwani is the answer to the problems!

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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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What have been your Brand’s legacy and what evolution you have observed over the years?
The brand Johnson-Tiles originated in England in 1901 and travelled across the World with pride. Making in India was set up in 1958, during this journey Johnson evolved organically as well as inorganically by brand and product-line extensions at H & R Johnson (India). As a responsible custodian, HRJ India created 3 more sub-brands and each of these enjoys the status of being well known names in their respective categories viz, Marbonite in the Polished Vitrified category, Porselano in the Glazed Vitrified tiles category and Endura in the Industrial and heavy-duty special tiling solutions category.

How has the Indian tile ceramic market evolved over the years?
Indian tile Industry is a great example of Industriousness and might of Indians. Compared to less than half a dozen players three decades back, today, the organised and unorganised players put together have matched the pace with the world ceramic tile industry and now India is among the top three ceramic tile manufacturing countries in the World. In spite of lack of proper infrastructural and other internal challenges, the quality and variety in the Indian tile industry has increased multi fold. Globalisation has made technology easily accessible and with some ups and downs in construction activities impacting consumption patterns, I see a great future of the Indian tile industry.

What is the market share that you have currently versus the unorganized players and how much will...
your market share increase going forward
Organised sector as a whole has close to 40% share in ceramic tile. With changing dynamics of the market and customer aspirations along with some Government policies like implementation of GST, the organised sector share is on rise and is estimated to go up to 60% in the coming years.

What are the current market trends in terms of products and what new products have you launched yourself?
See, unlike apparels, tiled floor is expected to last much longer so you won’t see any seasonal changes. At the same time, Architects and Interior designers do create new themes which are influenced by contemporary aesthetics and Global trends in colours, shades and patterns. India is a country with perhaps the widest range of preferences and in terms of aesthetics there is a huge difference in taste and likings. Some of the visible trends include -
* increasing popularity of large format tiles as they reduce grout-lines on the tiled floor or walls.
* Matt finish is catching up quite fast, particularly where Architects and Interior Designers are involved.
* Glazed Vitrified Tiles as a category is fastest growing
* Market is moving towards premium products.
* In low price segment, regional choices of aesthetics are still important.

We launched a new and very special collection of Glazed Vitrified Tiles in large format under the brand – Johnson Porselano which includes 240 x 120cm, 120 x 120 cm and 160x80 cm size tiles. Size and designs is not the only differentiator for this range; these are India’s only GermFree® (anti-microbial) and Stain Free tiles. Our commitment to the environment and established R&D efforts have developed over the years and we have launched the Endura Cool-Roof SRI tiles which helps in reducing the temperature in the room below the roof in hot peak summer days. Similarly we have revamped our Germ Free wall tile collection which comes in a unique size of 60x40cm and is supported by floor tiles in 60x60 cm with Scratch Free and Germ Free features. Under the Marbonite brand we have introduced large format tiles in 80x160cm Elite range. Overall in this financial year, approximately 1200 new concepts have been planned and some are already produced and are available in the market.

To summarise, large format tiles in matt and rustic finishes in earthen shades, specifically grey and beige are favourites of Architects. Polished Marbles are still popular among end-customers in India.

Can you tell us about your export volumes? From where you see maximum demand?
We are focussing more on the Domestic business. However, the reputation of brand Johnson and high quality products are also being exported to countries like France, Germany, UK, US, South Africa, Australia, Middle-East, Sri Lanka and Taiwan. Our value of export in the year is approximately INR 50 crores and we are evenly spread across export destinations.

Being a Leader in new innovations and the various prestigious titles received, how do you see yourself in coming years?

Johnson and innovation have been like a synonym and it is a well-recognised fact. Right from our patented Soluble Salt technology, to Anti-skid floors, Water-repellent tiles, Stain-Free Vitrified tiles, Endura Cool-Roof SRI tiles, Anti-Static tiles and India’s only Germ-Free tiles, our uniquely equipped and dedicated R&D has been creating innovative products that can add value to home lifestyle. Innovation is in Johnson’s DNA. We are currently working to launch some very unique tiles that safeguards people from radiation in places like hospitals and scanning rooms where X-Ray and MRI rooms are hosted. Many more innovative products or value additions to existing products will keep on coming in future as well.

What is the potential of the Indian ceramic tile industry in the global front?

Worldwide, the tile category is mostly a local subject. New capacities have been added in different geographies promoting local production and that is quite logical too. There will always be some changing dynamics influencing global transactions, but the focus is on local markets. Globally, tile industry growth rate has also been affected in recent years. At this moment, global trade is not a big story for Indian tile Industry.

What are your plans for the future?

As you know, we are among the few integrated building material companies having cement, ready-mix concrete and construction chemicals along with its H&R Johnson division which offers tiles, bath-wares and engineered stone. Our current top-line is close to Rs. 6000 cr and in a few years, we will achieve the Rs.10000 cr mark. We have invested in creating good capacities using latest technology and have enough head-room to grow in the tiles category as well. In the tiles category, the focus will be on value added products which add to top and bottom lines.

ICCTAS, as a body is actively working towards bringing changes and recommendations necessary better growth that our industry requires to function at its optimal best? Your feedback and suggestions?

In fact, there is a great opportunity for all responsible members to utilise this platform and promote ceramic tiles. There is a common problem that every player is facing - lack of good workmanship resulting into poor results and disappointment of customers from tiles. There is a need to educate the customers. With cumulative efforts under the banner of ICCTAS, some skill-set improvement programmes can be started for masons and contractors. Also there is need to go to Architecture and Interior designing institutions where we can educate the young students about tiles and correct way of decision making and installing tiles on site. In the long term this will be highly beneficial for the Industry and will result in lower customer grievances.

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Stunning Slabs

RAK Ceramics shares some of the current trends in flooring for the year 2019 and its latest big slabs collection, the Maximus and Maximus Mega Slabs, its uses on walls, floors, countertop surfaces and furniture.
and architecture world by opening up new perspectives in tiles applications that were previously unimaginable. These continuous surfaces are designed for a multitude of applications including floors and walls, cladding, furnishing, countertops and the collection provides creative flexibility along with high technical and aesthetic performances. Available in sizes 120cm x 240cm and cut sizes 120cm x 120cm, 80cm x 240cm and 60cm x 120cm, the collection includes a huge range of stones, marble effect, cement, unicolor and metal. At the moment, the thin slabs segment is a relatively small segment of the tile industry, but it is a fast-growing segment. Maximus supersized porcelain slabs can vary in thickness from 6mm to 14.5mm.

Another new trend is the application of thin slabs on furniture. Maximus is ideal for dressing up modern spaces and covering tables, doors or living room furniture. You can choose your favourite decorating style in order to create a coordinated environment. Marble, metal, stone and concrete become part of the interior design without any compromise.

**Three different functions:**
- **Aesthetic** – tiles are part of the interior design project along with the other finishing materials so it’s important that they look good and fit in with the style of a space.
- **Technical** – they are able to withstand the stresses produced by the people who use the spaces without suffering damage or deterioration.
- **Functional** – they are hygienic and capable of effectively withstanding foot traffic, frost, fire, and the elements.

A number of key aspects must be taken into consideration, most importantly the place where the tiles will be used. Indoor or Outdoor? Floor, Wall, Countertop or Furniture finishing? What style, classic or contemporary? What size? Tiles are a completely flexible
option for furnishing spaces which makes them extremely versatile!

The RAK Ceramics Maximus collection has been totally renewed with an even wider range of sizes and in three thicknesses from 6mm, 9mm and 14.5mm. The sizes range from small 60 x 120cm cut sizes up to the super-sized 135 x 305cm. Resistant to heat, recyclable, light and easy to clean, Maximus Mega Slabs are the best solution to the most demanding architectural and interior design needs.

With Maximus Mega Slab the design possibilities are endless. Imagine a tiled space with virtually no grout lines. Imagine limitless possibilities for your surfaces and unparalleled flexibility. Maximus is available in 3 thicknesses and a wide range of finishes and sizes.

Heat resistant, recyclable, light weight, durable and easy to clean, Maximus provides architects and interior designers with the perfect solution for their needs.

Available sizes
- 135x305cm (14.5mm thickness) – UAE only
- 120x260cm (6mm thickness) – UAE only
- 120x240cm (6mm or 9mm thickness) – UAE and India
- 80x240cm (6mm or 9mm thickness) – UAE and India
- 120x120cm (9mm thickness) – UAE and India
- 60x120cm (9mm thickness) – UAE and India

Versatile and simply beautiful, Maximus Mega Slab revolutionises the design and architecture world by opening up new perspectives in tile applications that were previously unimaginable. The continuous surface of Maximus is designed for any type of application including floors and walls, cladding, furnishing, and countertops, providing creative flexibility combined with high technical and aesthetic performance.

Walls
The perfect solution to create astonishing vertical surfaces, including splashbacks, in kitchens or bathrooms, Maximus allows freedom of expression to create statement walls with a big personality.

Floors
Maximus has created a world where big is beautiful – with visually expanded spaces and fewer design interruptions, Maximus for floors creates endless design possibilities combined with incredible aesthetic appeal and high resistance to stress.

Countertop Surfaces
Countertop surfaces is the next generation of Maximus applications creating kitchen surfaces and bathroom vanity tops using a single piece of porcelain, creating a stunning visual and seamless design.

Furniture
The best answer to a new trend. Maximus is can be used for dressing up modern spaces and covering doors, tables, or living room furniture. Choose your favourite style and create a seamless environment. Marble, metal, stone and concrete become a fluid part of the interior design without any compromise.

www.rakceramics.com
**PROPRIETOR DETAIL**
Name: Sharwan Kumar
Mob.: 9350170497, 9810917497

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FOCAL POINT | VILLEROY & BOCH

Stylish & Edgy Bathrooms

Villeroy & Boch has bought Collaro, a complete bathroom solution collection, which involves washbasins, bathtubs and bathroom furniture, apt for every character and mood.

Villeroy & Boch offers high-quality products designed to transform the bathroom into a stylish and functional oasis of wellbeing. Since its foundation in 1748, the ceramic producer has developed into an international lifestyle brand. Like very few other premium brands, Villeroy & Boch is deeply rooted in European culture. And, in the way that only a great brand can do, it has understood how to preserve its identity while still moving with the times.

Villeroy & Boch has presented its new collection Collaro, with a strong character. A recessed design edge is a very stylish feature that cleverly emphasizes the slender shapes of the TitanCeram washbasins. Collaro therefore creates a timelessly beautiful living space that conveys an immediate sense of well-being. Its high-quality materials and a distinctive look, makes Collaro instantly recognisable.

The washbasin as an eye-catcher
The washbasin is a central element in any bathroom. It sets the tone for the style of the entire space: from classic to modern, or minimalist to elegant. Collaro features a linear and yet homely look, with attractive narrow edges and slender walls.

The premium bathroom collection therefore reflects the enduring trend towards greater lightness - giving it a very distinctive character. This new sensation of lightness in the bathroom has been made possible thanks to the development of the material TitanCeram. The titanium ox-
ide in the formulation refines the ceramic and allows the creation of shapes combining extraordinary strength with a timeless look - also available with the exceptionally beautiful and extremely resistant TitanGlaze in the matt shade of Stone White.

With a wide selection of washbasins, Collaro offers the perfect solution for different tastes and room configurations. From vanity unit to surface-mounted or wall-mounted, single or double basin, round or square, the 15 different models open up extensive scope for interior design.

Collaro bathroom furniture: storage space and statement in one
Collaro offers a selection of spacious vanity units coordinating with the washbasins and available in 10 on-trend colours. Dimmable lighting makes the recessed groove in colour-coordinating aluminium a real feature - adding atmosphere to the entire space as well as the actual unit. The collection includes matching tall cabinets and side cabinets to address any need for additional storage space. One practical extra feature is the option of an integrated laundry hatch in the tall cabinet.

Collaro surface-mounted washbasins can be combined with furniture from the Legato and Finion series.

**Customised relaxation: Collaro bathtubs in different looks**
Collaro acrylic bathtubs reflect the character of the washbasins and impress with a distinctive fusion of lightness and comfort. Their dynamic shape is inspired by a harmonious interaction of rounded edges and flowing lines. The wide rim on one side of the tub coordinates with the design of the washbasins while at the same time providing a practical surface for storage. The integrated outlet and overflow solution in Chrome, Champagne, Gold or Black Matt is another striking design feature. One particular highlight is the optional water inlet that fills the bathtub like a softly flowing waterfall.

The collection Collaro includes three different back-to-wall bathtubs and built-in baths in different sizes. The monolith baths can be supplied with an elegant panel in your personal favourite colour. The optional whirlpool system further enhances the relaxing experience.

With Collaro, Villeroy & Boch is launching for the first time a collection that makes the premium TitanCeram material accessible to customers in the mainstream segment. Collaro therefore creates a bridge between Villeroy & Boch’s premium and mainstream collections, making it an ideal option for customers seeking high-quality materials and modern design at an attractive price.

www.villeroy-boch.asia.com
Product Offerings

Presenting new launches, product features and more from the leading companies in India.

**ASIAN GRANITO**

Johnson Porselano Royal Care Slabs are Asian Granito has launched Grestek MarbleX, which aims to create a style that is artistic yet natural. The product is perfect fusion of colors, creation. Big size and modern look of MarbleX make them suitable for residential, offices, hotels, malls, airports etc. Its flexible tile body and slim thickness of 9mm is ideal for quick home renovation as it can be placed on existing old flat floor using tiling adhesive. MarbleX is also getting good traction from elevation wall application.

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**KAJARIA CERAMICS**

Kajaria has introduced - Duratech Heavy Duty Vitrified Tiles (40 x 40 cm). This novelty has raised the benchmark of tile making. Having thickness of 12mm and water absorption <0.10, Duratech can be used for both internal and external spaces. They are safely used in driveway, terraces, veranda, swimming pools, sidewalk, airports, train stations, industrial buildings, parking lots, underpasses and villa gardens. With a design that has redefined and fresh look, it will surely add enchanting beauty to both indoors and outdoors.

011- 26946409
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**SOMANY**

Somany has recently launched the Orna Matte collection in Matt Finish, which can give the home a minimalist, warm, rustic look or anything in between add to finish off your space in style. These tiles have a slimness of only 8mm, and come in a variety of designs without compromising on strength. The highlighter tiles are adorned with intricate undulations with crystal effect which makes them stand out and shine in spite of having a matte effect.

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Somnath Mob. 9310030051 Sunny Meheriya Mob. 9716964470
Shish Pal Mob. 9310030053 Dharmveer Maheriya Mob. 9711197812
UJJVAL PLASTIC

Manufacturer of Tiles Plastic Corner & Plastic Tiles Corner in Rajkot, Gujarat.

PLOT NO.20/2, TARGHADI IND. AREA, OPP. BHOLODIA FARM, NR. GOKUL IND., J RAJKOT - 360110 Haryana

Mob. 9712853653
Email: ujjvalplastic105@gmail.com
L.R.PACKAGING

( Address  Kh. No. 93/4 Jindpur road Alipur Delhi 110036)
Manufacturer of Plain and Printed Inner & Outer cartons
COMPLETE PACKAGING SOLUTIONS RELATED TO
CORRUGATED BOXES UNDER ONE ROOF

We Not Only Manufacture Corrugated Boxes But Also Helps In Cost Reduction By
R&D, Our Past Experience Supplies In Ceramics Industry

Contact us : ☑️ +91 9811236165 ✉️ tarun_jain_84@yahoo.com
Importer & Traders of Indonesian & South African Coal

Head Office:
A-905, Solitaire Corporate Park, B’s Divya Bhaskar Plaza,
S. G. Road, Ahmedabad - 380 015. Ph : +91-40071616 / 17
E: sohamcoal@gmail.com | w: www.sohamcoal.com

Plant:
S II No-52, B-Chachavadara, Pipliya-Maliya Road,
Pipliya, Dist. Morbi-363641, Gujarat
INDIAN COUNCIL OF CERAMIC TILES AND SANITARYWARE (ICCTAS)

List of Member Companies

ACER GRANITO PVT. LTD.
Lakhdhirpur Road, 8-A, National Highway Morbi – 363642 Gujarat

ANTIQUE MARBONITE PVT. LTD.
B-A, National Highway Lakhdhirpur Road, Morbi – 363 642

ASIAN GRANITO INDIA LTD.
Ceramic Zone, At & P.O. Dalpur Tal. Prantij – 383 120 Sabarkantha, Gujarat

CALYPSO CERAMIC PVT. LTD.
Survey No.661, P1 Near Rangpar Village Pipili-Jetpar Road T.A. Morbi, Dist. Morbi Gujarat – 363 642

COMMANDER VITRIFIED PVT. LTD.
Aalap Park Society, Plot No.67 Ravapar Road, Morbi – 363641 Gujarat

CORAL GOLD TILES PVT. LTD.
8-A, National Highway Lakhdhirpur Road, Morbi – 363 642 Gujarat

CORAL GRANITO PVT. LTD.
8-A, National Highway Old Rafaleshwar Road B/h. Lalpar Village, Morbi – 363 642, Gujarat

COSA CERAMICS PVT. LTD.
Nr. GSPL Gas Terminal 8-A, National Highway Lakhdhirpur Road, Morbi – 363642 Gujarat

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

KAJARIA CERAMICS LTD.
J-1/B-1 (Extn.) Mohan Co-op.Ind. Estate Mathura Road, New Delhi - 110 044

KAJARIA SANITARYWARE PVT. LTD.
Survey No.129 J-1/B-1 (Extn.) Mohan Co-op.Ind. Estate Mathura Road, New Delhi - 110 044

KAJARIA TILES PVT. LTD
(Formerly known as Kajaria Floera Ceramics Pvt. Ltd.)

ORIENT BELL LTD.
“Iris House”, 16 Business Centre Nangal Raya, New Delhi - 110 046

PRISM JOHNSON LTD
(H&R Johnson (India) Division) “WINDSOR”, 7th Floor C. S. T. Road, Kalina Santacruz (East), Mumbai - 400 098

R.A.K. CERAMICS INDIA PVT. LTD.
P.B. No: 11, IDA Peddapuram ADB Road, Samalkot - 533 440 East Godavari District, Andhra Pradesh
TRADE EVENTS

SALONE DEL MOBILE
November 20 - 22, 2019
Shanghai, China
www.salonedelmobile.com

ACETECH
November 7 - 10, 2019
Mumbai, India
www.etacetech.com

MIDDLE EAST STONE
November 25 - 28, 2019
Dubai, UAE
www.middleeaststone.com

THE BIG5 CONSTRUCT INDIA
November 25 - 28, 2019
Mumbai, India
www.thebig5constructindia.com

CERAMIX EXPO
November 21 - 24, 2019
Gandhinagar, Gujarat, India
www.ceramixexpo.com

ACETECH
December 5 - 8, 2019
Delhi, India
www.etacetech.com

THE BUILDING SHOW
December 4 - 6, 2019
Toronto, Canada
www.thebuildingsshow.com

WORLD ARCHITECTURE FESTIVAL
December 4 - 6, 2019
Amsterdam, Netherlands
www.worldarchitecturefestival.com

ACETECH
January 24 - 26, 2020
Hyderabad, India
www.etacetech.com

THE INTERNATIONAL SURFACE EVENT
January 27 - 30, 2020
Las Vegas, USA
www.intlsurfaceevent.com

IDAC EXPO
January 30 - February 1, 2020
Mumbai, India
www.idacexpo.in

CEVISAMA
February 3 - 7, 2020
Valencia, Spain
cveisama.feriavalencia.com

QUALICER
February 10 – 11, 2020
Castellon, Spain
www.qualicer.org

IDF OMN
February 11 – 13, 2020
Oman
www.idfoman.com

Standards are never set in stone. They need to be set only to be broken to make way for something better & beautiful. And when you’re setting standards in style, the more you set them, the more tempted you are to go one step better.

Just a fleeting glance at RAK Vitrified and Ceramic tiles and Sanitaryware is all that will take you to understand what we mean. After all, when you’re the world’s best, you know you have a standard to set and a reputation to live up to.

Just when you thought the best couldn’t get any better...
Standards are never set in stone. They need to be set only to be broken to make way for something better & beautiful. And when you're setting standards in style, the more you set them, the more tempted you are to go one step better.

Just a fleeting glance at RAK Vitrified and Ceramic tiles and Sanitaryware is all that will take you to understand what we mean.

After all, when you're the world's best, you know you have a standard to set and a reputation to live up to.
Introducing Porselano Mega Porcelain Slabs from Johnson.

These large-format 120 x 80 cm tiles are larger in size and hence give your floors and walls a seamless look. Offered in 16 themes across marble, wood, stone, cement, and the newly introduced TREACLE finish, this stunning range will indeed floor you!

Johnson Porselano is available in various sizes – Glazed Vitrified Slabs in 80 x 80 cm, germ-free Porcelain Slabs and Splits in 120 x 60 cm & 120 x 20 cm respectively and Glazed Vitrified tiles in 60 x 60 cm.