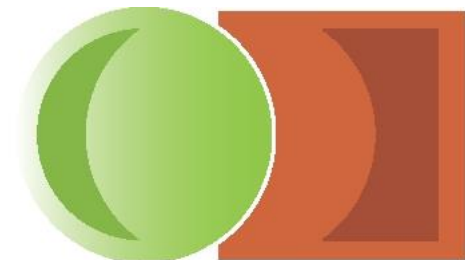


World Ceramic Tiles Forum – National Context

INDIA



World Ceramic Tiles Forum

PRESENTED BY:

P.N.TRIVEDI

Chairman

**INDIAN COUNCIL OF CERAMIC
TILES & SANITARYWARE**

INDIAN COUNCIL OF
CERAMIC TILES & SANITARYWARE



National Context – INDIA



- I. Trend in the construction sector/demand
- II. Trend in production, consumption and trade in ceramic tiles
- III. Latest developments at national level in energy supply regulation and taxation
- IV. Development in standardisation or regulation at national level affecting ceramic tiles
- V. Other national developments relevant to the ceramic tiles sector

I. Trend in the construction sector/demand

- **Indian Construction industry - \$157 Billion, expected to go to \$180 Billion by 2020.**
- **Divided into Housing, Retail, Hospitality and Commercial**
- **Housing comprises of 5-6% of the GDP**
- **Favoured sector for FDI by Global investors**
- **Government initiatives :**
 - **100 smart cities**
 - **Housing, Water, Electricity and Toilets for every citizen**
 - **“Make In India” Program**
 - **Real Estate Regulatory Authority**

II. Trend in production, consumption and trade in ceramic tiles

- New Investments have added capacity, currently total capacity estimated at >1.2 Billion Sq m.
- Industry has swiftly adopted to production of larger formats – 800*800 / 800*1200/ 1000*1000 mm
- Inkjet printing has been a game changer in glazed ceramic tiles.
- Development and growth of Morbi cluster has been significant in impacting the dynamics of the industry
- Large format in all product categories driven by consumer convenience and aesthetics.

II. Trend in production, consumption and trade in ceramic tiles

- Glazed vitrified tiles attracting huge interest on account of infinite variety aided by inkjet printing technology.
- Paving tiles gaining acceptance and growing as a product segment contributing 7% of volume, industrial floors, high traffic areas, walkways etc. find application.
- Vitrified tiles (printed as well as multi-color) expected to continue growing significantly owing to inherent advantages of wear resistance and strength.
- Low thickness of top layer in double loaded vitrified tiles will gain significance as manufacturing costs drop.
- Low thickness products in all categories, subject to functional requirements being met, expected to grow as an environmentally friendly / green product

II. Trend in production, consumption and trade in ceramic tiles

- World 3rd largest producer and consumer of ceramic tiles
- Production in 2015 – 850 msm.
- Consumption in 2015 – 810 msm.
- Export in 2015 – 75 msm.
- Imports in 2015 – 70 msm.
- Per Capita Consumption – 0.68 sq.mtrs / annum.
- Growth rate - 12% - 13% per annum.

II. National Tile Production by Type

- ▶ **Glazed Wall Tiles – 48%**
- ▶ **Glazed Floor Tiles – 7%**
- ▶ **Polished Vitrified Tiles – 35%**
- ▶ **Glazed Vitrified Tiles – 10%**

III. Latest developments at National level in Energy supply regulation and taxation

- Natural Gas remains the primary energy source for ceramic industry.
- Industry dependent on imported LNG, because of shortage of domestic production
- Open access power sourcing option widely utilised in the industry
- Coal based thermal power enjoys dominant position.
- Renewable power sources (Wind/ Solar) gaining significant share in generation stack with necessary supports for GOI.

III. Latest developments at National level in Energy supply regulation and taxation

- Variable frequency drives being employed widely optimizing power consumption.
- Energy efficiency is a focus area for the industry, high tonnage ball mills and larger wider kilns are the norm.
- Heat recovery in kiln is an industry norm.
- Combustion air pre-heating is an integral part of ceramic kilns.
- Efficient combustion systems are being widely used in Kilns

IV. Any development in standardisation or regulation at national level affecting ceramic tiles

❖ **Revised IS:15622 Specification for Ceramic Tile is in print**

This revision incorporates changes to make the specification closer to ISO 10545

❖ **Adhesives For Use With Ceramic, Mosaic and Stone Tiles – Specification (First Revision of IS 15477)**

This revision incorporates all the technological advancements in the tile fixing adhesives

❖ **IS 13712 : 2006 Ceramic Tiles – Definitions, Classifications, Characteristics and Marking**

This revision reflects all changes made in IS 15622 and will be shortly out on wide-circulation before it goes for print

❖ **IS 13630 (Part 1 to 15) : 2006 Ceramic Tiles – Method of Test, Sampling and Basis for Acceptance**

This revision will be on wide-circulation shortly. It has been aligned with ISO 10545 ,and includes two new parts

- a) Determination of lead and cadmium given off by glazed tiles
- b) Determination of small color differences and light reflectance value

V. Other National Developments

- Stable Central government with absolute majority to create impetus for growth.
- New initiatives by the Central Government like smart cities, toilets for every home etc to boost the industry growth
- Standard GST across the country.
- To rationalize the freight rates.



THANK YOU