

03

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M+
MATERIAL PLUS
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INSIDE:

M+ INDUSTRIES IN FOCUS : Stone | Wood Imports | Wallpaper | Market Watch : Marble Hub Kishangarh

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The last month of the year holds in its grasp the experience of the past and the promise of the future, which for an industry group as vibrant and dynamic as the materials sector, is an assurance of prosperity and growth. Despite the trying times of the Indian, and world market, the Indian materials sector has done well, keeping its collective head above the water, and in some cases, achieving growth.

As we dive deeper into the sea of materials, this month's focus is on stone, wood (an industry with a continuing presence through all editions of M+) and wallpaper. The stories of the industry are told, as always, by the members of each industry group. And they are always enthralling. The histories behind the companies we see today, the path they have trod to get to where they are, are all impressive in the challenges they have overcome and in the sheer tenacity of the promoters to achieve success.

We are enormously pleased as a team to be able to both explore these industries and to present the story of each sector to you, and to share with you the power of the people who make up the vast materials sector of our country. The people on whose broad shoulders the entire furniture manufacturing and interiors sectors rests.

As we welcome a new year, Team M+ wishes all our readers a happy, healthy and prosperous 2020 !

A handwritten signature in black ink that reads "Sylvia Khan".

Sylvia Khan
Editor & Creative Head, Material Plus



EDEN MCCALLUM

London, UK
Align, London, UK

Material palette:

Fabric, carpet, tiles

Design brief and aim:

To design an office with a variety of productive working spaces that combine fixed desking with more agile working practices.

How this was accomplished:

The reception area doubles as a welcome point and business lounge, highlighting the company's branding against a painted, petrol-blue background and three two-tone Mango pods from Boss Design. A lounge area zone to the left has a reworked storage wall, white

doors, and three Vitra chairs. The existing lobby was redesigned to accommodate a one-person phone booth built around a column. There are three booths fitted with sound-absorbing, round acoustic panels on the inside walls.

The circulation route in the lounge leads to three enclosed meeting-rooms on the left followed by a boardroom. There is an open meeting area near a tea point, resembling agile workspaces and an Osborne & Little 'Trailing Hummingbirds' wallpaper, gives the impression of a mural. A solid Jensen booth seat from Verco

was brought in from the previous office with a brand-new matching counterpart. The seats balance the femininity that the wallpaper brings, while two large Albion Court pendant lights with white shades hang overhead.

Bespoke glass doors and windows feature in the meeting rooms highlighted in pale grey, blue and purple. Subtle white-and-gold wall-covering (the Lounge Lux design by Engblad & Co.) takes pride of place in the boardroom.

Floor-to-ceiling hanging felt acoustic sliding panels with a fret-cut motif





in aqua and teal panels create segmentation in the office (by Edinburgh-based Friends of Wilson). Four carpet tiles (Per Contra range by Milliken Carpets) and a woven tile (from Karndean) make up the flooring in the general office.

The centerpieces in the kitchen and breakout areas are blue and white (DooWop by Louis Poulsen) pendant lights that complement the white and multi-tonal blue colorway. Petrol and navy-blue storage spaces border the kitchen area with splashback blue tiling the lights and screens. High-level and lower-level Frovi Relic tables with olive-green Fenix tops and black bases fingerprint-repellent finish are other elements here. There are booths between the touchdown area and hot desks with Haven seated wrap-around pods by Senator. There is an emphasis on inviting in natural light and the London skyline views. +



GABRIELA HEARST

London, UK
Benchmark, Foster + Partners, London, UK



Material palette:

Timber, glass, leather.

Design brief and aim:

To create a pioneering example in sync with the brand's first New York store which uses several natural materials and organic design.

How this was accomplished:

The two-storey store occupies a prime site in the heart of London's West End, where sustainability has dictated every detail of the design of the store. The material palette comprises recycled or

locally-sourced elements with no harmful chemicals used. An element of luxury is maintained by use of soft-geometric furniture pieces integrated with LED lighting, vegetable-tanned leather, and rose-gold-accented lining; all of which are environmentally-friendly.

The three-tiered knitwear cabinet is made out of thin timber frame and glass. The display cabinets have leather-wrapped drawers and carcasses while the shelves feature leather panels with integrated lighting. The rounded coffee tables





were crafted from London Plane timber that was sourced from a fallen tree in Lincoln.

The clothes rail is wrapped in leather defined by a timber frame highlighting the clothes on display. The store windows have been left uninterrupted and without mannequins, creating a seamless and relaxed experience. The clothing section houses bespoke racks and lounge seating while another space contains knitwear and other accessories. +

IIT ROPAR Rupnagar

Stone Oasis, Jaipur & ITD Cementation India Ltd.



Rupnagar and the Archaeological Survey of India. The theme for the pillars is the Indus Valley Civilization due to its proximity to the Ghaggar-Hakra beds, an Indus Valley site.

The end design was expressed in truncated, pyramid-shaped pillars featuring enormous stainless steel molecular structures atop each pillar, signifying



Material palette:

Dholpur Beige sandstone, stainless steel and cement.

Design brief and aim:

To showcase a blend of traditional and technology at this educational institute in a historic city.

How this was accomplished:

IIT Ropar commissioned Jaipur-based manufacturer Stone Oasis to create a centerpiece for its campus in Rupnagar.

The firm dedicated a year to conceive an appropriate design structure that would do justice to the heritage of the city. This included multiple meetings and intensive research and data collection. The information bank was collated from the Archaeological Museum at



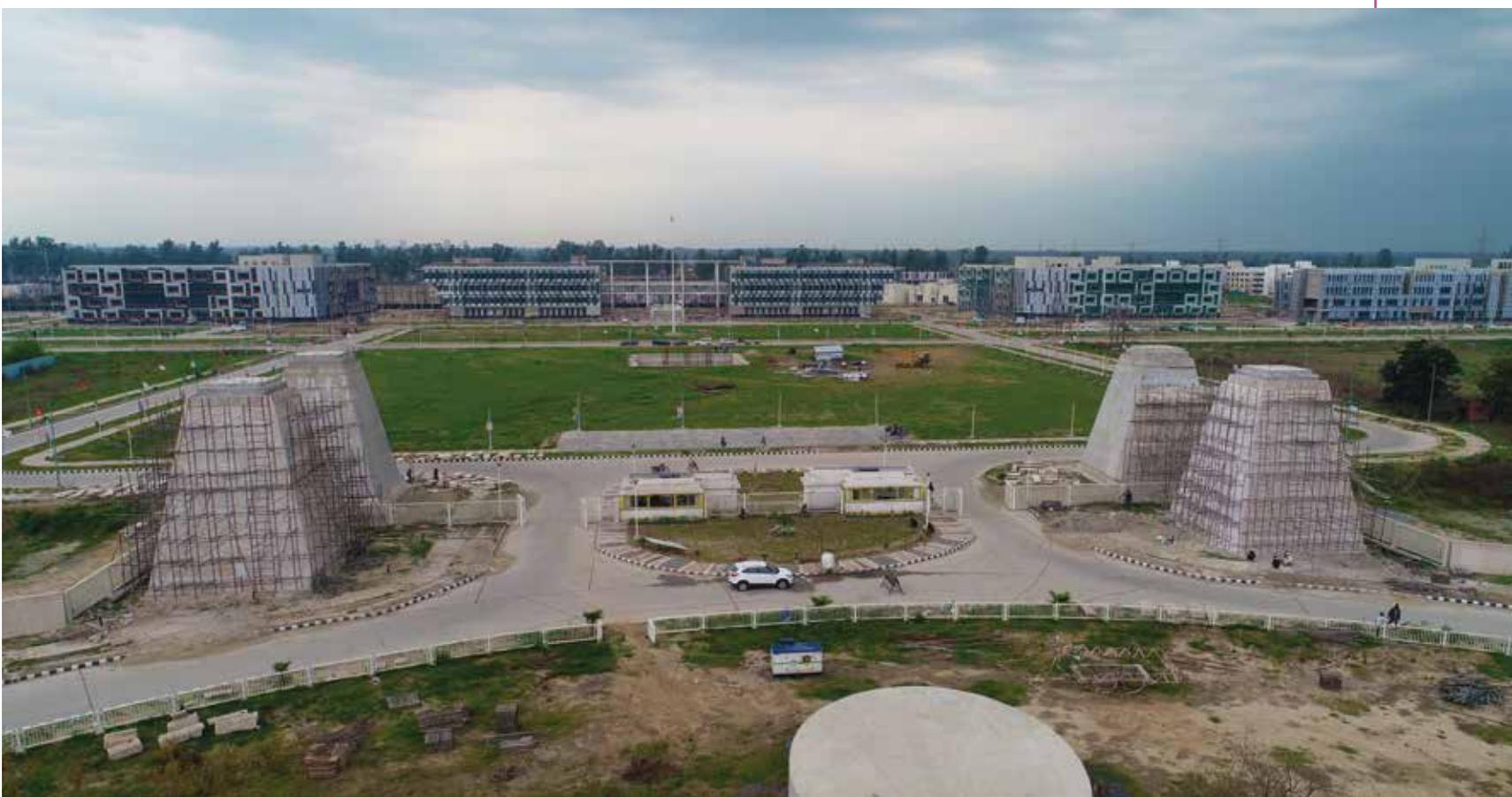


the advancement of technology, hand in hand with history. Each pillar showcases Harappa and Mohenjodaro motifs such as the Great Bath, wells and trade seals depicting the horned deity Pashupati (one of the earliest depictions of Lord Shiva), carts, jewellery beads, wheeled toys and terracotta figurines of the Priest-King, the Bull, the Dancing Girl, the harvest goddess, and others. The undeciphered writing of the Indus Valley Civilisation can be found here as well.

Dholpur Beige sandstone of approximately 125-200 mm thickness (5-7 inches) was used to engrave the sixteen faces of the existing 4 RCC pillars at the main entrance. This was done keeping in mind the required line, level and alignment, and curvature at all heights. The structure was designed to accommodate the dry climate with hot summers and cold winters.

The surface area of each is around 100 sq m with the stone carving done in the factory. Each face consists of 90-100 stones with a central figure and related motifs. These motifs are carved with a design depth of up to 150 mm (6 inches) as per the approved concept. The carved stones are fixed on the pillars with stainless steel clamps and fasteners over a 30 mm thick bed of cement and coarse sand at a ratio of 1:3. Each of these pillars has a height of 60 ft (41 feet pillar + 19 feet molecular structure) and a base of 3.2 ft, with a surface area of each face of 95 sq m (1000 sq ft).

The entire sculpture paints a clear picture of the Indus Valley Civilisation, which is remembered for its urban planning, baked brick houses, elaborate drainage system, water supply, and non-residential buildings. It also evokes the skill of the ancient civilization's craftsmen, who showed great skill and vision in creating Carnelian products and more. +



MUSE BY

Luxembourg City, Luxembourg
Michaelis Boyd, London, UK

Material palette:

Terracotta, wallpaper, brass, terrazzo, tiles, timber, marble, oak, glass, velvet.

Design brief and aim:

To design a space that resonates with the young and fashionable female segment and attracts new customers.

How this was accomplished:

The retail space is spread over two floors with the street entrance at the upper level. Balancing soft and industrial elements, bespoke luxury was realized through the use of nature-inspired De Gourney wallpaper contrasting with brass hanging rails. Handmade terracotta tiles lead to the front entrance transitioning into oak floorboards and soft carpeting at the back. A warm visual impact is created with a curved till point topped with a terrazzo worktop clad in handmade terracotta tiles along with the back wall, accentuated by small glass wall lights from Bocci, at the rear. Other elements used include colorful terrazzo, green glazed tiles, brushed brass hardware, and timber finish. In keeping with modern retail trends, the counter-top of the café counter is fashioned out of handmade green glazed tiles (by Otto tiles) and a dark-grey terrazzo worktop with earth-toned chips. Dark-green velvet barstools are placed near the lip of the counter. This is followed by the cosmetics counter in unlacquered brass that will patinate with age.





Timber shelves sit above the counter, supported by a curved brass wall-hung frame. The backdrop to the counter is a wall of glazed green tiles with bespoke oak joinery below.

Mannequins sit upon timber plinths with undulating hanging brushed brass rails and backlit floating shelves. Minimalistic customized cabinets of glass paneling, timber, and brass details highlight the jewelry within. Semi-translucent polycarbonate screens with brass trim are used over external windows and behind cabinets to maintain privacy while allowing natural light.

The second section has a central shelving bay and plinth in grey terrazzo speckled with terracotta, green and ivory marble chips; a muted color scheme that complements the light dusty-pink walls. A circular, green carpeted area forms the changing area with a curved green velvet sofa following the carpet



radius. A series of filament bulbs in concentric circles light up the space, a pink velvet curtain suspended from a curved brass rail offers privacy. The ceilings have been left exposed, revealing ductwork and suspended track light fittings that lend to an industrial look and feel.

A staircase with a black steel balustrade and brass detailing leads down to the basement showcasing sunglasses upon shelves with a timber backdrop, mounted upon a terracotta wall. The staircase and walls highlight terracotta tiles with suspended pendant lights on brass chains illuminating the lower level.

A circular green soft-taupe carpet in the shoe zone at the back of the store highlights the curved semi-circular hanging rail above. Oak low-leveled steps following the perimeter of the build create a showcase for footwear. +



OMAXE PROJECT

Mullanpur, Chandigarh
I'm: The Centre for Applied Arts, New Delhi



Material palette:

Wood, glass, steel, reclaimed wood, acrylic.

Design brief and aim:

To design a villa that exudes playful familiarity with a bold streak of personality.

How this was accomplished:

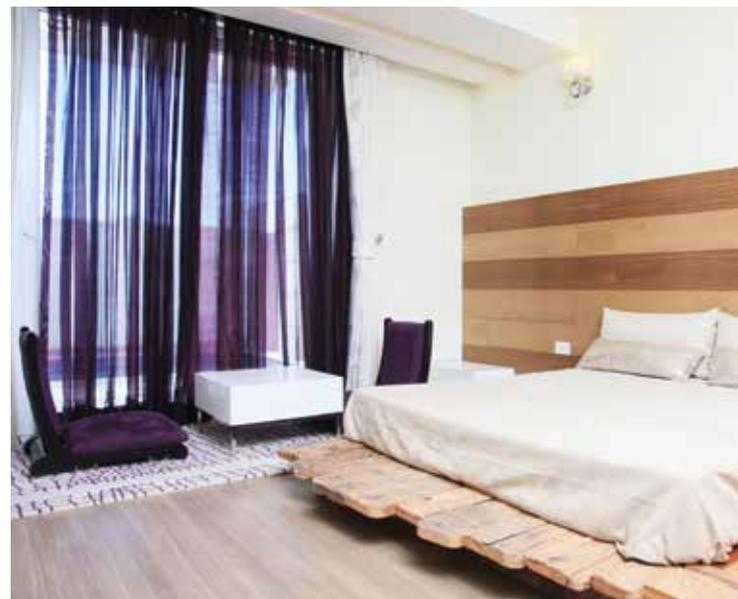
The neat precision of industrial design inspires the fusion of different materials, finishes, technology, and handicrafts used in the project. Eclectic minimalism in clean and straight lines, while crisp whites and greys form the basic color palette with bold accents.

The formal sitting area houses a plush black sofa with contemporary wooden

arm detailing, a minimal white tufted chaise, a white polyurethane material, and an enameled-glass center table with black, grey and powder-blue details. A monochromatic carpet in color highlights, acrylic solid surfaces, and a tree-inspired organic metallic wall installation create an ultra-modern look. A grey wall in the casual entertaining zone is a backdrop for a minibar with white counter details and red bar stools. There is a neutral-toned sofa with a blue highlight, a colorful geometric carpet, coffee tables in steel and a sculptural chandelier.

Sustainability is an important aspect of the project; the dining table is handcrafted out of reclaimed wood with curved steel legs complemented by





white chairs with similar leg details. The deluxe white sofa against a blue-and-green backdrop and the reclaimed-wood coffee table with steel leg detailing offers privacy and acts as a visual buffer from the atrium bar space below. Muted gold accents with detailing add glamour. The white upholstered bed with a tufted headboard features minute-size variation along the base and mattress with wooden leg detailing. Other elements include curvilinear coffee tables topped with wood-framed glass, a grey chaise with jewel-toned pillows and white leg details and a monochrome-striped wallpaper and striped carpet in contrasting colors.

The guest bedroom contains a low-floor, rough-cut wood-plank bed with white geometric detailing. Floor chairs and a wooden coffee table with a colored accent extend the language. The white coffee table with acrylic surface and wood inlay maintains the a sense of luxury. An asymmetric orange-tree-shaped shelf with matching cushions adds playfulness to the space. The daughter's bedroom has a couture-gown-inspired scalloped bed in deep burgundy, adding a whimsical element. +



LIKES

17

THE SEVENTY

Noida, Uttar Pradesh
AND Studio, New Delhi

Material palette:

Concrete, glass, wood, marble, hardwood, granite, mosaic.

Design brief and aim:

To create a modern residence that reflects a shifting urban lifestyle and incorporates technology and innovation in the materials and techniques used.

How this was accomplished:

The residence spells technological advancement with a moving façade, transparent glass walls, and an articulated revolving door. Large, see-through, shell balconies seamlessly bring Nature into the indoors. Concrete, glass, and wood lend

a subtle aesthetic, while the light constantly changes the visual impact of the space. Vertical gardens minimize the harsh effects of the sun, while a central staircase connects all the three levels and provide visual impact. Functional areas have been fitted into the intermediate spaces between these levels.

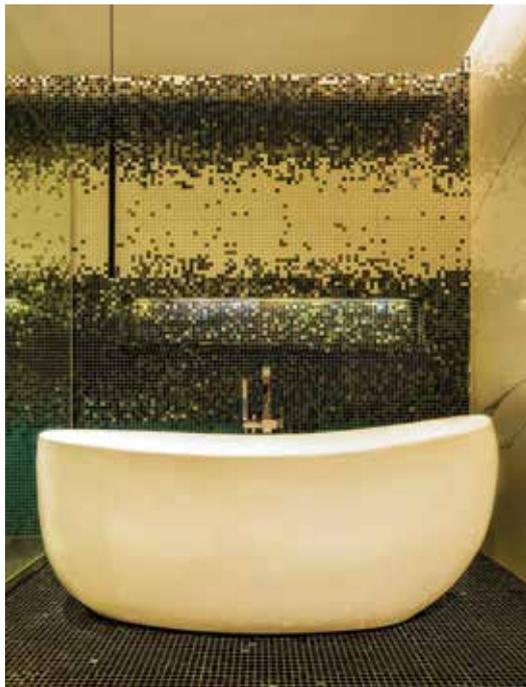
The triple-height living area is outlined by glass partition walls, and natural light flows in to the kitchen through enormous glass windows, which is reflected off the white marble counter-spaces and floors. Reflecting the warmth of the dining area, the play area integrates white marble and hardwood flooring, flanked with vertical planters and a pool table.





A subtle color palette and intelligently-divided bedroom spaces conceal unwanted elements, while pendant lights, huge mirrors, and hanging elements catch the attention. The ambient lighting and Statuario white marble lend tranquility to the lobby.

White and brown marble with touches of black granite have been used in the bathrooms, which house the standalone bathtub, water closets and basins. The walls adjoining the bathroom fittings reflect the mosaic art. +



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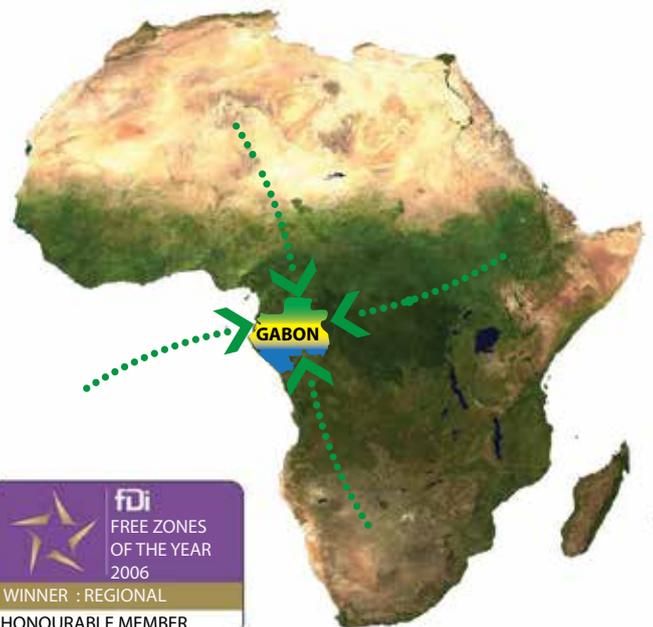
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A high-angle, artistic photograph of a dark, marbled stone floor. In the upper left, two stools are positioned: one is a light-colored, rounded stool with three thin legs, and the other is a dark wood stool with a curved, open base. In the lower left, a stack of papers or a book is partially visible, resting on a white, curved surface that appears to be a piece of stone or a ledge. The lighting is dramatic, creating strong shadows and highlights on the reflective stone surface.

INDUSTRY IN FOCUS:
STONE

AMIT SHAH

Managing Director, Classic Marble Company, Mumbai

The latest synergy

We have an exclusive tie-up with global tiles leader – Kalesinterflex – to market its products in India. Kalesinterflex is one of Turkey's oldest and world's most renowned ceramic tiles manufacturers pioneering in the ultra large-sized formats. One of its USPs is that the tile has a flexibility radius of 5.5 m making it an extremely versatile and easy to handle with products that can be installed on curved surfaces as well as at heights. Within this range, we have recently launched a translucent porcelain slab variant which allows the installation to be backlit for effect. We are very excited about this synergy with global majors and the product has already found its market in the country.

Innovations

Redefined for modern architecture, CMC's Terrazzo collection is a unique offering that combines the exquisiteness of mosaic and elegance of marble. CMC offers over 30 Terrazzo designs in five brilliant designer collections under KalingaStone Marble. The Terrazzo slabs can be repolished to maintain their natural beauty for a long time. The products are less porous, more flexible and harder than natural marble making them ideal for different types of interior and decor applications like flooring, walls, table tops, etc. in commercial as well as residential areas. CMC is also the first company in India to introduce an innovative technology – Process 360 to carry a rigorous treatment on every marble slab to achieve unmatched strength and durability in Classic Marble. The nine-step process for marble treatment not only beautifies its appearance but also increases its strength and durability. Each marble slab is processed for strong pro block strengthening, anti-moist treatment, back pro treatment, master crack treatment, grinding and calibration, vein-hance to highlight veins and patterns, Classic shine for meticulous finish

and shine and most importantly Classic care, an unmatched aftersales support.

We've recently introduced a Stone Art collection in our products portfolio which offers engraved or carved stone slabs. These are available in both natural and engineered marble as well as in granite, quartz and porcelain slim slabs. Stone Art uses computerized technology for carving with high-pressure water jet. The water jet effortlessly carves and shapes even the most complicated designs and seamlessly sculpts the designs on stone.

Engineered v/s natural stone

Engineered stones are new age stones that fulfil certain requirements in conventional design. Being a manufactured product it is made in slab formats and is available in conventional sizes. It offers advantages like consistency in color and pattern which are limitations in natural stone. Natural stones, especially marble, are timeless. There is no way that man can replicate designs formed over ages and under nature's influence. Natural marble is bespoke and when installed, it exudes sheer luxury and opulence.

Our flagship brand

KalingaStone is the most recognized brand in the engineered stone segment not only in India but also across the world. The product is exported to over 66 countries. When we launched KalingaStone, it was a strategic decision with little risk. Its products are installed in several prestigious projects and architects and interior designers like our offerings.

Competition from ceramic tiles

The two products are as different as oranges and apples, and any comparison would be unfair, however, as both are surface covers. The biggest difference between marble and ceramic is the former's inherent quality owing

to its composition as a material. A ceramic tile may appear to be a marble but will never be able to offer the same magnificence as a marble application. Also, as a material, marble is intrinsically cool which helps keep the place where it's installed cool; it is especially great for tropical climates like ours. Importantly, a ceramic tile doesn't have the same charisma as marble.

Trendsetters

Turkey, Italy and America have always been more experimental with design than any other part of the world.

Creativity expressed in digitalization

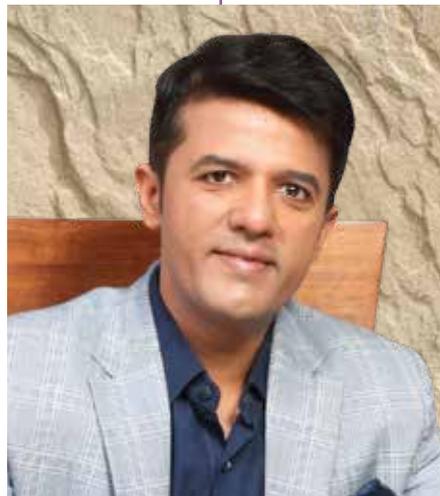
Our KalingaStone range is a realization of digitalization. Natural marble designs reproduced in engineered marble are possible because of digitalizing the patterns, texture and colors of the former but not limited to it. This is applicable to our products in Quartz as well as in porcelain slabs.

Economic impact

There is no price reduction in the HNI segment, to which we largely cater. But in the real estate industry, developments and projects have been greatly affected, to the tune of 30 to 40 per cent, due to the economic slowdown.

The domino effect

People have moved from natural marble to engineered marble due to the price factor and the new technology. The engineered variant offers a similar product that has the look and feel of natural stone and is less expensive. Developers and projects in particular have switched to engineered or artificial marble. This is also because RERA mandates that developers have to provide buyers the same marble as displayed in the mock-up flat.



SET IN STONE

India accounts for 15 per cent of the world's granite production

(Source : Federation of Indian Granite & Stone Industry, FIGSI). India is a major manufacturer and exporter of marble, granite, sandstone, slate and limestone. A look at the numbers over the past decade show an industry that has done well. In 2013-14, India's granite industry stood at USD 2.62 billion and around 50 per cent of all granite quarried is exported. Exports of granite and natural stones grew at 14.5 per cent in 2014-15. India's biggest export markets are the US and the EU. Almost 80 per cent granite and natural stone products make their way there, constituting the largest Forex earners in the mineral category and contributing to the country's economic wealth.

Rajasthan produces over 80 per cent of all marble in India, with Makrana a well-known hub for its namesake. Makrana marble can be sourced from several mines along with the Aravalli range such as Doongri, Gulabi, Matabhar and Chosira. Makrana alone is a center of employment for above 70,000 people in the area. Other natural stones such as granite and limestone feature on India's list of exported stone. Situated in a consumption-based economy, natural stones are extensively used in residential, commercial and hospitality sectors.

India constitutes granite resources worth 46.23 billion cu m with production in Rajasthan, Jharkhand, Orissa, Andhra Pradesh, Tamil Nadu, Karnataka, Chattisgarh and Madhya Pradesh. Other stones such as slate are found in northern India, while there are limestone quarries in the southern states of Andhra Pradesh and Telangana. Sandstone deposits are scattered over the Bharatpur, Jodhpur, Chittorgarh and Shivpuri districts of Rajasthan.



“Each country boasts of a certain quality and texture of granite, which cannot be replicated, so we have no competition,” says Raghav Periwal, Managing Director, Paradigm Granite Pvt Ltd, Hosur.

Challenges

The increasing popularity of Chinese tiles has affected the marble market. Sellers say that the reason behind the growing phenomenon is its lower cost, but natural marble will always take precedence when it comes to longevity. Other stones such quartz also saw a slowdown about a year ago. (Source: Business Standard)

“The demand for quartz had increased dramatically but prices have now skyrocketed due to 300 per cent import duty. This has led to a huge Rs. 200 crore loss for the industry,” says Tarun Kumar Agarwal, Director, PSG International Stone, Hosur.



acme stones pvt ltd, halekotta



pokarna limited, secunderabad



figsi, bengaluru

The import industry

Despite being a major marble exporter, India has imported approximately INR 1,400 crore per annum of Italian marble by 2016. Italy is especially known for its Carrara marble with its fine texture and toughness, extensively used in several monuments in India. Italy tops the list in natural marble market export by 20 per cent, followed by China, India, Spain and Portugal. These countries contribute to approximately 60 per cent of the global marble market.

The Indian government launched the liberalization of import policy, which allowed many factory owners to import the same despite high import duties. Marble is a premium product, so the Indian market is expected to touch 5 million tonne in the next five years. While there was just one major marble factory in south India before the launch, there are now 30 companies with a couple of marble gang saws each.





paradigm granite pvt. ltd., hosur taluk



pokarna limited, secunderabad

Government initiatives

The Indian government has set some reforms in place to streamline export models. A Minimum Import Price (MIP) has been introduced, which has reduced to USD 200 per metric tonne while the customs duty on marble import has risen to 40 per cent. This has been done to encourage domestic sales. However, the stone industry requires better government regulations, systematization and market consolidation to improve.

What's needed

Industry members feel the government must adopt stringent practices to understand the demand pattern and movement of the stone market. Attempts need to be made to uplift the visibility and brand of the Indian stone market through stone festivals, foreign promotional trips and meets. Dimensional stones should renamed 'Ornamental Minerals' and brought



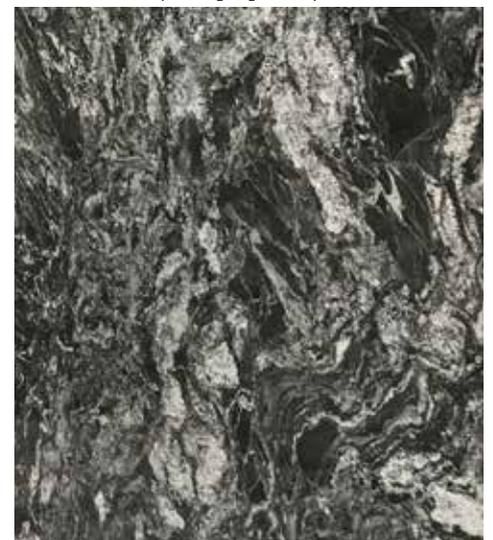
figsi, bengaluru



united granites (p) ltd, salem



a bluehill granites india pvt ltd, coimbatore



paradigm granite pvt. ltd., hosur taluk

under the government's jurisdiction. The Ornamental Stone Industry must be declared a 'thrust sector' and 'mineral-rich zones' must be demarcated. There needs to be a time-bound disposal of regulatory approvals and lease applications to quicken the process along with a single-window approval system from the Ministry of Mines, Government of India.

Outlook

Though the domestic market had seen a low in the marble and stone industry, there is increased demand from the USA. India's granite export market was expected to grow at a CAGR of 10 per cent in 2014-2019. In terms of employment, the dimensional stone industry today promises 6.42 million direct job opportunities (FIGSI) leading to a rosier outlook for the industry. +



a-class marble, kishangarh



acme stones pvt ltd, halekotta



a bluehill granites india pvt ltd, coimbatore



psg international stone, hosur



PROMOTING STONE

**An interview with
Krishna Prasad,**
General Secretary,
Federation of Indian Granite
and Stone Industry (FIGSI),
Bengaluru

The overview

In 1983, there were serious problems in the Karnataka granite quarrying industry, and FIGSI was conceived out of the process of solution-making. A few visionaries formed the All India Granite and Stone Association, with the objective of promoting natural stone. This was later renamed the Federation of Indian Granite and Stone Industry in 2014, with over 1200 members from different segments of the industry, across the country.

How it works

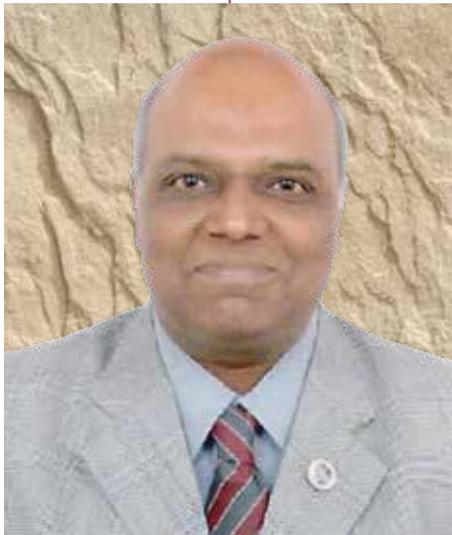
FIGSI works at a deeper level to represent the industry to the central and state governments. It informs the government about problems faced by the industry and offers remedial solutions as well. Being the only all-India government-recognized stone association, we have been included in various committees formed by the government. The Granite Development Council was formed through our effort. The Granite Development and Conservation Rules (GCDR) were published in 1999 and one of the results was the introduction

of the long-term leasing policy. This meant that owners could lease quarries for 20 years and renew for 20 years more. Currently, the GCDR is under amendment to suit the present-day scenario and will be published by the Union Government.

Market scenario

India exported rough-dimension stones before 1983. So, for example, Italy imported granite blocks from India, processed them and exported them to other countries. The world was unaware of India's granite deposits. India soon imported the technology from Italy and other countries and set up processing units. Today, more than 80 per cent granite is exported as a finished product after value addition.

The first Stona exhibition was held in 1987 with Rs. 50 crore worth of exports, out of which more than 90 per cent consisted of rough-dimensional blocks. After Stona 2018, exports rose to Rs. 14,000 crore out of which 85 per cent was exported after value addition. If the government supports us, the industry can double in the next five years.



Trends

Granite was once advertised as a luxury item in the domestic market but is now available at affordable ranges too. Its use, which was largely restricted to kitchen tops and monuments, is now also in cladding, landscaping, and industries. People need to be made aware of the advantages of granite over vitrified tiles, ceramic and engineered stone such as toughness, durability and low maintenance. It resists potential damage such as scratches, bacteria, pressure, heat, liquids and stains.

Although we exploit just three per cent of the total stone reserves in our country, we see other countries favoring ceramic, quartzite, vitrified and porcelain tiles, reducing the demand for granite. There has been a sharp, 40 per cent drop in granite, which has been replaced by quartzite.

Then and now

The stone industry used blasting methods to quarry granite, which was both wasteful and environmentally damaging. Now, they use gangsaw and multiwire technology, which are efficient yet economical. Today, India has quarrying machines and processors equivalent to machines overseas. +

POSITIVE DESPITE A LULL

Kishangarh's Marble Industry looks ahead

+ Kishangarh, located near the historically well-known city of Ajmer, in Rajasthan,

is Asia's largest marble market. With almost two-thirds of the total 150,000 population directly and indirectly dependent on the stone industry, it was once known only for its proximity to marble quarries like Makrana. Local entrepreneurship has transformed Kishangarh into a global center for domestic and imported marble and

granite, generating employment for migrants and locals.

With more than 50,000 marble sellers, suppliers, manufacturers, exporters and importers the town generates the annual business of over INR 120 billion. The market size of imported marble in Kishangarh is around INR 50 billion





out of which branded players account for over INR 10 billion (Kishangarh Marble Association). There are over 1,000 gangsaws, 5,000 edge cutting machines, around 25,000 godowns and more than 50,000 traders in Kishangarh, which also has a flourishing market for the power-loom and ball mills sector.

Varieties and sources

Trucks loaded with gigantic chunks of stone are a common sight as one enters the dusty Madangaj area, housing most of the processing units and warehouses that display the widest ranges of Indian, imported and Makrana marble.

The collection includes premium grade marble, semi-precious stones, granite, travertine, onyx, limestone and composites sourced mainly from Italy, Spain, Greece, Brazil, China, Vietnam, Egypt and Turkey.



Om Prakash, Owner, Payel Enterprises, says, “Kishangarh offers about 10,000 varieties of marble starting from INR 20 per sq ft. There are newer varieties such as Vietnam white marble which is very delicate and meant for wealthy people.” Over half a million tonnes of raw stone is imported through ports across Gujarat and Maharashtra and processed annually, which constitutes around 50 to 60 per cent of the country’s total raw stone imports.

Some of the processing units sprawled on both sides of Kishangarh-Makarana road, where huge blocks of stone are cut and polished, display the latest, state-of-the-art machinery imported from Europe. While big players have several cutting machines with 50 to 100 blades that cut large stone blocks weighing up to four tonne into plates or slabs of desired thickness in 12 to 15 hours, smaller units have one or two cutting machines that produce a turnover worth INR 250 to 300 million annually (Kishangarh Marble Association). A few players have gone to the extent of using the most advanced automated technology that almost eliminates human intervention, right from cutting to polishing and lamination of finished slabs.

Markets and trends

Marble is no more a luxury patronized by a privileged class. Mukesh Patodi, Owner, Patodi Stones, says, “The popularity of marble is widespread among the rural and urban middle class across the country. The application of



marble has become a status symbol among the middle and upper middle class. Granite, too, is gaining more popularity during recent years. However, institutional sales account for almost 70 to 80 per cent of the total turnover."

While there are many options available in the market today, marble continues to be an evergreen trend for all, according to Rajesh Bhandari, Director, A-Class Marble India Pvt. Ltd. "This is also because marble is available in a broad range of colors, patterns and designs. A smooth finish and luminous appearance after polishing makes it the most preferred material for interior designers. It is easy to clean, has a high resistance to fire, and is extremely durable and long lasting. Marble is also a symbol of elegance, versatility and exclusivity and forms a staple in the spatial design of luxury hotels owing to its regal appearance," he adds. That perhaps is the reason one sees a swarm of retailers, distributors and traders from all over India coming to Kishangarh to buy marble. Shahbuddeen Noor Mohammed, Owner, Rameshwaram Granite, Kishangarh who caters predominantly to the markets of Delhi, U.P., Punjab and other areas in north India as well as Gujarat and Maharashtra says the markets are growing. He says, "We have regular supply to Mangalore, Bangalore and several other areas in Kerala and Tamilnadu despite the growing trend to use ceramic and artificial stone".



Dealing with the slump

The fate of the marble industry is dependent upon the construction industry. “Over the last three years, several units are struggling to maintain their sales, which have been on a decline in some categories, due to low demand. Demonetization and new GST regime have also contributed to the slowdown,” says Om Prakash. While there is no competition within as the color and texture of marble and granite varies from place to place, a lull in the housing market has resulted in faltering demand, feels Rajesh Bhandari. “As the construction industry consolidates, it will translate into a subsequent rise in the demand but currently there are no such signs and we hope things will improve over the next few months”, he adds. +



RAJESH BHANDARI

Director, A-Class Marble, Kishangarh

Introduction

We established A-Class Marble in 2005 with a vision to bring the world's most magnificent marble to India. We are now the largest importers of marble; we also manufacture rare stones and our warehouses are sprawled over 1,20,000 sq ft in Moti Nagar, New Delhi. We have procured a state-of-the-art production unit spread over 500,000 sq ft at the RIICO Industrial Area in Kishangarh, Asia's largest marble market. We use cutting-edge technology for our collection with an emphasis on high quality.

Company

We deal with more than 450 varieties of marble, granite, stone and other exclusively-sourced architectural surfaces. In 2017, we introduced ceramic and porcelain slabs in our 'Make in India' range by the Italian brands 1st Tiles, Fiandre and Fuori Formato. Thus, we established the 'A-Class Surfaces International'. We are one of the few leading brands that offer the widest range of options in format, thickness, color, finish and texture. We offer bespoke products of very high quality. Our clients include the hospitality and residential departments (biggest customers), architects, interior designers and celebrities. The sale of marble in the FY 2018-2020 has been great, as we are now open to pan-India opportunities and retail sector apart from developers and real estate companies. Also, we have expanded our customer base from Delhi/NCR to a more pan-Indian level.

Export market

A-Class Marble imports 80 per cent of products from the international market and supply all of it to the domestic market. We focus on the domestic market as a lot of construction work is going on in cities such as Delhi, Ahmedabad, Mumbai, Bangalore and Hyderabad. However, we are looking for international opportunities as well. Although there are other products in the market, marble is evergreen due to many reasons. It is available in a wide range of colors, designs and patterns. It is a favorite of any interior designer due to its smooth finish and its luminous appearance after polishing. It is fire-resistant, maintenance-friendly and durable – making it a choice material for spatial design in luxury hotels.

Import market

Liberalization of the import policy has helped the marble industry. Earlier, people had to obtain a licence to import marble. Today, anyone can import marble. This makes natural marble now accessible to every household.

Trends

Apart from flooring options, people have now incorporated natural stone to accentuate spaces as well. Natural stone in different finishes and textures are used in facades and kitchens. Due to a recent consumer interest in porcelain, we have introduced this in our portfolio of offerings.

Future

Though we have seen a lot of development in the metropolitan and tier-1 cities, we will be focussing on the tier-2 and tier-3 cities as well. We will soon launch a new porcelain range and trending colors for our client base.



SUBHASH GUPTA

Director, Acme Stones Pvt Ltd, Halekotta, Tamil Nadu



Introduction

Acme dealt in steel, before stone. We set up a granite plant in 1993 but it didn't work out. Our major concern was maintaining international quality, which was time-consuming and labor-intensive. Today, Acme Stones holds a high position in the natural stone industry.

Company

Primarily, we deal in natural stones such as granite and marble. We mainly process and export, but also import stone from other countries. There are around 50-60 varieties of granite in our resources, and we have specialized in mosaic designing since the past 15-20 years. Chips of marble waste are carefully reused, rearranged and used as wall decoration. This provides a layer of protection on the walls along with wall cladding at zero cost. Apart from that, we have advanced machines that can cut thick slabs of stone into paper-thin material (about 1.1 mm in thickness), which are easy to transport and install with the same life expectancy.

Export market

Until recently, we exported all the stone slabs to different countries such as the USA and Europe. More recently, we realized that there was a domestic market for stone. Now, we focus on the Indian market (80 per cent) and export around 20 per cent of our products to other countries. We have seen the emergence of newer stones, improved techniques of manufacturing and mining and general awareness regarding stone. For example, people would only use marble to build monuments and temples; today, it is also useful for wall cladding at home. We grade prices based on the kind of work and availability that the particular stone merits.

Sandstone is readily available in India, so the prices are generally cheaper.

Domestic market

The domestic market for stone is very good, we are eager to sell more products in India. The primary reason for this is our stone's compatibility with our climate – for example, sandstone is perfect for warmer climates (it cools down the house), while granite is perfect for colder climates (it warms up the house). We supply to builders, distributors and retail clients.

Challenges

We face several issues when exporting stone abroad. Exporting stone is a time-bound process, and we do not have the required labor and resources. The Indian calendar has several holidays and this affects the delivery process as well. There is also competition within the industry – which is part of any industry. Other industries such as wood have come up as well but they do not have the durability of stone. Sometimes, architects want a particular design to be carved on stone – in their case, it's both visual appeal and a USP that they looking for.

Technology

Advanced technology has certainly brought us more profits than in the last decade. Earlier, we used dynamite for mining, which was environmentally damaging and wasteful. We would transport 4000 slabs and only get 70 per cent of recovery on the products after value addition. Now, we have machines that slice thick stones into paper-thin slabs. We can now transport around 20,000 slabs and receive 120 per cent recovery, which makes transportation a less laborious process.



ARVIND JAIN

Director, Adeshwar Granite Pvt. Ltd., Bengaluru

Introduction

When I finished my MBA in 2000, I saw potential in the export market for granite. We installed a manufacturing unit in 2001. We have supplied and exported granite, marble, and stone since then, and supply natural stones within the country and overseas as well. We export 25 per cent of our product and supply the rest to the domestic market. Since we primarily deal with the domestic market, we see a business of approximately Rs. 2-3 crore regularly. There is a huge demand from architects as well, but most of our clients include construction contractors such as L&T and CCCL and high-end offices and hospitals.

Domestic market

The domestic market is low due to increasing transport expenditure, slow real estate industry projects and lack of support from the government. We hope that 2020-2021 will be a good year for new projects in the stone industry. We have planned to increase our production capacity to improve our export percentage. Once the

market is steady, we will expand our brand.

Challenges

We rate our products according to their range: premium, classic and standard ranges along with a country parameter. We face substitution competition from all over the world, but Indian granite is superior in terms of product, color, and design. However, we do face some competition from ceramic and vitrified tiles and Italian marble.

Imports

Liberalization of the import policy has allowed companies to import Italian marble, which is a huge competitor to granite and other marble manufacturers (and distributors) in India. On the other hand, liberalization has also allowed the import of raw material such as blocks.

Trends

The demand for Italian marble has risen and this has badly affected Indian marble. However, the granite industry is doing quite well, for now.



N. PADMANABEN

Director, A Bluehill Granites India Pvt. Ltd., Coimbatore



Introduction

Bluehill Granites India Pvt Ltd was started in 1992. We manufacture and export granite, some of which is suitable for architecture while others are for flooring. We supply to both the Indian as well as international market. We usually deal with architects and end-users to offer all kinds of trending colors and designs. Most importantly, we ensure that the granite is defect-free, rich in deposits and uniform in color and structure – which affects the price as well.

Domestic market

Being from the south, we supply material to the southern parts of the country as longer distances involve travel and damage costs. We do supply some of our products to Mumbai and Delhi, but that number is quite low. I have seen that the people of Kerala and Bengaluru are interested in natural stone while others are simply interested in plastering.

Imports

The Government of India wants to promote indigenous granite. So, although the import of granite is not allowed generally, we have an import license as we are a 100 per cent export-oriented unit. We import granite from South Africa, Canada, and Norway.

Challenges

Neighboring countries such as China pose a threat as the manufacturing process there is quicker and intensive as compared to India. There are labor issues; most of the younger generation wants to choose urban-centric, corporate jobs. We also find that users love ceramics due to their design, uniformity and lower cost in comparison to granite.



RAGHAV PERIWAL

Managing Director,
Paradigm Granite Pvt. Ltd., Hosur



Company

We process more than 60 premium colors of granite such as Moon White, Golden Beach and Rosewood among others. We import, process and export granite to countries like Canada, the USA, and Italy. Since we are in the manufacturing business, our clientele consists of distributors.

The market

Although the domestic market is very bad, there is a market near Bengaluru that does business worth Rs. 6 crore daily. This market comprises small- and large-scale industries. Externally, I don't think we face major competition from any other country as each boasts a certain quality and texture of granite which cannot be replicated by others.

Trends

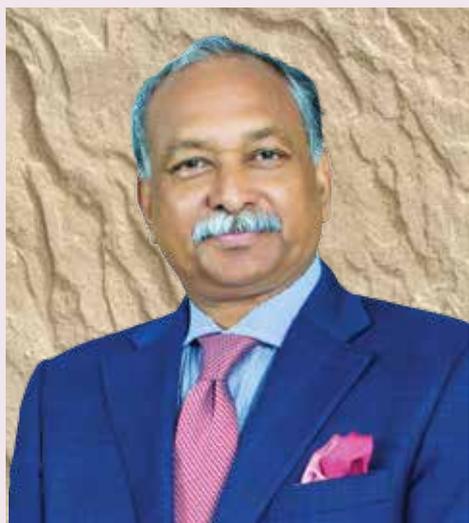
Contrary to popular thought, there are many uses for granite. For example, in India, the use of granite is widely seen in residential, commercial, hospitality, industrial and other sector projects. Granite has also been bought by both the high and mid-segment but prices have dropped, recently. In terms of faux stone, I believe that there is a certain requirement for them as well. However, we only deal with natural stones.

Future

India is a price-conscious market where deals are made or broken due to cost. Indian users show a preference for a portfolio of 10 to 15 colors including Copper Green, Classical Paradise, and White. Since granite is mainly a functional product, I don't see any innovations in it in terms of machinery or product.

GAUTAM CHAND JAIN

Chairman, Pokarna Limited, Secunderabad



Introduction

We started Pokarna Limited in 1991 to venture into the granite business. We began by acquiring quarries and related operations as opposed to starting with processing plants. This company rose to prominence with the manufacture of high-quality granite in both domestic and international markets. Pokarna Limited came to be recognized in the American market which had once been averse to Indian companies.

Company

Pokarna Limited exports natural granite and engineered stones to various countries such as North America, Europe, and the Middle East, with a minimal amount set aside for domestic consumption. Our quarries produce some of the most coveted granite varieties such as Silver Pearl, Black Galaxy, Pokarna Green, and Acacia. Apart from granite blocks, we also export tiles, cut-to-size and random slabs, for consumption. The quality and price depend on the

blocks themselves, and the values are re-standardized every interim period.

Trends

Global stone usage has moved towards project exteriors, thus stone is available in various finishes. The use of faux stone complements natural stone, which is a depleting natural resource in itself. Also, the trade has developed while the economies of scale have become larger due to the liberalization of the import policy. On the domestic front, it is difficult to guess the size of the domestic market due to a large number of unorganized players.

Future

Though our major focus is on the international market, the domestic market for natural stone seems steady due to globalization and foreign investment flow. We don't face any major competition from similar industries. We cater to international direct distributors, domestic architects, buildings and end-consumers.



TARUN KUMAR AGARWAL

Director, PSG International Stone, Hosur

Introduction

I am the first-generation member of my family to manufacture (process) and export natural stone. I have worked in various granite-related industries and finally started this company with Mr. Paras Choudhary. We manufacture and export natural stones such as granite and marble, but have chosen not to sell in India because of its poor market. PSG International Stone was started way back in 2005, and today we supply premium-quality granite in the colors of Rosewood and Ghibli granite. Our granite and marble manufacturing plant by the name PSI Stones Pvt Ltd was established in 2016. We usually export natural stone to countries all over the world; in fact, five per cent of our rejected material is sold in India itself.

in the bathroom and kitchen areas. On the other hand, the USA's import of quartz has stopped due to high import duty charges, but it continues to import natural stone on the side.



Exports

The export market is promising. We send granite and marble to Europe, America, and Singapore among many other countries. Some time ago, the demand for quartz had increased greatly but prices have now skyrocketed due to a 300 per cent import duty. This has led to a huge, Rs. 200-crore loss in the industry. A petition has been filed to counter this.

Trends

Today, we see a trend in ceramic and quartz over natural stones. We see a product available for every segment, be it for high-end or mid-end customers. We feel that artificial stone is popular in the USA not so much in India. In India, artificial stone can only be used

UTKARSH KALANI

Director, World of Stones, Mumbai



Introduction

At first, in 1999, we exported rough, natural stone. We entered the domestic market only in 2009. We take quality testing seriously; this has resulted in the certification of ISO 9001:2008, ISO 14001:2004, OHSAS 18001:2007 and SA8000. We have also been certified for ethical trading, sustainability, and non-employment of child labor. We make \$30 million by exporting over 4000 containers per annum.

Company

Since 1999, World of Stones has dealt with sandstone, limestone, Indian and imported marble, quartzite and slate. In addition, we make exclusive artwork and other products from natural stone for indoor and outdoor structures as well. Our products are distinctive for their quality, design, and finish. They can be used for walls, internal flooring, landscaping, and outdoor applications as well. They can be used for mosaic and murals as well as they are a decorative and durable way to add individuality to a space.

Exports

About 90 per cent of our products are exported but there is some domestic purchase as well. This domestic market for natural stone is small but gradually rising. We primarily deal with the export of exclusive products and do not face any major competition in the industry. However, we do face

competition from other kinds of industries – material related to indoor walls, facades, and floors at different price rates. We usually target high net worth individuals, designers and architects engaging in constructing and designing hotels and other commercial spaces. Also, the import of marble was earlier governed by a license, but now anybody can import marble – making it a competitive industry.

Trends

We are seeing a rise in CNC work on imported marble with gold/silver finishing. Also, one can find contemporary designs in stone inlay work along with a fusion of metal with stone. The prices of these products depend on that of the raw material and the procedures involved.





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WOOD IMPORT

PRANESH CHHIBBER

Country Director, Canadian Wood

Why wood

Wood is natural, healthy, sustainable, eco-friendly, and it's beautiful! It is easier to work with than most people think.

Import-dependent India

India is a wood-deficient country. We have enough forests but we became greedy and decimated our forests; we did not adopt sustainable measures. By the time we realized this, we had already lost a major chunk of our forest cover.

Some areas that export wood, now, are deploying wonderful practices. In Kerala, for example, the logger for the logging company signs an undertaking at the time of entering into the lease contract that, for every tree harvested, three trees will be planted back into the same forest.

Not only the penalty is a sweet treat for nature but the way it is done is beautiful; there is no change in ecology. Seeds are taken from the forest that is harvested, brought to the nursery, the saplings are grown there in a greenhouse, and then planted in the same area from where the seeds were taken from, so the ecosystem doesn't see change.

Sustainable practices

The whole cultivation approach has to change. It is not just planting trees but looking after it and taking care of it until it is big enough to grow on its own. Adopting such practices will make forests stay with us forever. The prerequisite is to do away with some myths. The first and commonest of many is that it is against nature to cut trees.

The fact is that when trees grow old, their efficiency in absorbing carbon dioxide goes down. A healthy forest is achieved by chopping big, old trees. Another crucial step is for the government and regulatory authorities is to lay down certain dos and don'ts for sustainable practice. For example, in Canada, you cannot go and harvest anywhere; there are commercially identified forests for the activity. Also, the government doesn't allow more than two per cent of the commercially harvestable forest to be moved in a year. Hence, forests thrive, are sustainable and serve us for a long time.





Export and its challenges

Traditionally, the biggest market for Canadian Wood was the USA, for obvious reasons of it being just across the southern border. The downturn in 2007-2008 led to the exploration of offshore markets. In terms of volume, China is the largest offshore market, and in terms of value, Japan is the largest offshore market for Canadian Wood. We are still new in India, we have completed five years. Normally, when we get into any new geography, we give ourselves 10 years to set things right.

The challenge here is that there could not be two places further from each other than Canada and India. It takes a lot of time for ships to sail and arrive in India; we can't help that but a better rolling forecast can help overcome this challenge. The other challenge is that China, a country that consumes a lot of Canadian Wood, has the advantage of exporting a lot of manufacturing into Canada. As a result, there are empty containers waiting to take Canadian Wood exports and the freight cost per container is much lower for China as compared to India.

Indian market

There were times when India sought only dark wood. So when we came in, there was the misconception that heavier wood was better. The fact is that it is the strength of the wood that matters. In Conifers, which is what we sell, the strength comes not from the density of the wood but from the length of the fibre, which is three and half times that of tropical hardwoods. International trends have reduced this perception, somewhat.

India has traditionally had a wood culture but structural building with wood was never a scenario, except in some northern states. Some amount of wood construction did take place, but the method was unorganized; it was a skill set passed on from one generation to another. We went to factories that manufactured wooden products and suggested species from coastal areas of British Columbia, like Western Hemlock, Western Red Cedar, Douglas Fir, Yellow Cedar, which were unknown in India and/or were never imported or sold. We succeeded in making these popular and the export of these has grown exponentially, from Canada to India.



100 per cent wood is certified

Certification is done on the basis of practices that preserve forests. For the last three decades, Canada's deforestation is at zero per cent even though it is the largest exporter of lumbar in the world.

Worldwide, certification is primarily driven by two major organizations, PEFC and FSC. Canada's forests are majorly PEFC certified, and every inch of wood that comes out of Canada is certified. By virtue of the fact that we are the best in sustainable management practices in the world, our certification is huge as compared to other countries, and is at the core of our ecological practices.

Our goals

We are trying to find out whether the industry might be interested in building with wood or using it as a structural material. To our surprise, the answer has been 'yes'. We are now educating the market on how to build with wood. This is a long-drawn process; we are collaborating with architects, developers and manufacturers to build an ecosystem which will look at wood in structural applications. A six-storey building in wood is a common thing, next is going to be 36 floors, so wood is happening. The famous architect Michael Green has drawn up a theoretical paper proving that if the Empire State Building was to be built today, it could be built with wood.

We are also conscious of the market, we monitor it and are proactive. Decisions are taken on the basis of our understanding of what we are doing, and not what the competition is up to. My belief is that one should have one's strategies and priorities right, positioning correct and not worry about competition. Keeping an eye on competition is good, but that shouldn't become one's windscreen. +



IMPORTING WOOD INTO INDIA: A BRIEF OVERVIEW

Trade of wood and wood products is one of the fastest rising segments globally with India's import of logs, lumber, and wood product going up from US\$ 1.3 billion to US\$ 2 billion in the past decade.



Understanding the industry

The Indian wood and timber industry is largely dependent on import and wood import into the country quantified upper limit. Import into India was first in the form of logs, but soon changed to lumber on account of the issues with processing. Wood imports are expected to rise and India remains a potentially fruitful market for those seeking to import into the country.

Multiple segments like timber, plywood, veneer, handicrafts, pulp, and paper, etc. come within the umbrella of the wood industry. Urbanization has taken the demand for wood to new heights though this growth may also be credited to various national conservation measures and sustainable management policies.

Sailesh Hemnani, Brite Timber Corporation, says, "India was a timber exporting country in the mid-eighties before its tree-felling policy changed. The need for an increase in forest cover and environmental protection made India a timber-importing country."

The Indian market

Habituated to hardwoods that are perceived as impervious to the tropical climate, teak wood is typically seen as a benchmark in the market, imported at all ports of the country. The other major types imported include Pine, Sal wood, Fir, Spruce, Meranti, Balau, Kapur, Merbau, Cherry, Oak, Hickory, Walnut, Yellow poplar (Tulipwood) and Wenge. Pine is generally imported in bulk quantities into Gujarat. Given south India's preference for the best quality of timber, the more expensive and aesthetically appealing species are mainly bought there.

The species exported by India are mainly Shisham, Mango, Eucalyptus, Poplar, Babul, Red Sanders

and Sandalwood. Dr. Ajay Kumar Saxena, Consultant, Forestry for The Nature Conservancy points out, “The export-import and its acceptance depend on the market forces and demands. Variability in climatic conditions has given rise to an immense variety of tree species across the world making differential demands for various wood types and their products.”

Import scenario and dependence

Sameer Iqbal Chhapra, President, Timber Importers Association, Maharashtra, and Timber Federation of India, and CEO, ISC Group, says that more than 80 per cent of India’s demand for timber is fulfilled by imported timber. He adds, “Being one of the world’s largest consumers of wood products, India cannot meet its wood demand given the limited domestic supply. As a result, India is currently among the world’s largest importers of timber, with more than 65 countries already exporting timber logs, timber squares and sawn timber to India.”



brite timber corporation, mumbai



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India’s wood-import dependence is not just related to its demand, but also to conserving forests. Chhapra adds, “Because of increasing emphasis on conservation of forests, the Government of India policy of facilitation and liberalization of timber import has been in place since the 1980s. This was done to conserve the Indian forest cover by way of the National Forest Policy, 1988. The import of timber has risen steadily since then.”

India is facing a difficult wood demand-supply situation at present and is importing wood and wood products worth around Rs 50,000 crore every year. Dr. Saxena says, “This is because of an inefficient use of our land resources. The ratio of area under natural forests and timber production is imbalanced, owing to restrictions on felling or harvesting. Natural forests being dedicated to only conservation is making us dependent on wood imports despite the soil of our land being so productive.” The ‘slash and burn’ approach to harvestation has cause critical loss of green cover across the nation.

The solution lies in following some sustainable forest management practices. Says Pranesh Chhibber, Country Director, Canadian Wood, “The entire cultivation method has to change. It’s not just about planting trees, it is about what follows ahead, it is about taking care of the plantation until it is big enough to grow on its own. In future, adopting such practices will make forests stay with us forever.”



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Snoozing alarms

Apart from the challenges of organization and fragmentation, phyto-sanitation and varying moisture and temperature levels during shipping present another set of difficulties for Indian buyers. Dr. Saxena details other challenges: wood prices, geographical distances of wood exporting countries translating to increased costs, illegalities in wood harvesting in countries of origin, plant quarantine issues, wood quality issues, competition with domestic wood species, etc.

Naturally dried timber is lighter and easier to transport which reduces handling costs. But the drying process can be expensive, depending on the method that ranges from air-drying to kiln-drying amongst others. There are other costs connected to

storage and climate, which balances the money saved on handling costs.

Being a conventionally hardwood market, the country is also looking for alternatives due to log export restraints in Myanmar, Malaysia, and other tropical countries. The substantial change in the nature of imports is also due to a high GST rate, according to Chhapra. Reminiscing, he talks about the times of VAT regime where importers could import wood, sell it and pay the VAT liability in the next month after sales, as compared to the times of GST now, where the importers have to pay IGST upfront during import, before selling the cargo, which puts an unnecessary strain of 18 per cent on the finances of timber importers. Chhapra says, "Timber is a raw material and not a finished product

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and a GST rate of 18 per cent on an essential commodity is detrimental to trade and, ultimately, to the common man.”

Elaborating, Chhapra mentions the minimum floor price set by customs as a liability. The value of the imported timber shipment is assessed unjustifiably unilaterally. He says, “A customs duty of five per cent (in case of round logs and rough squares) and 10 per cent (in case of sawn timber) is levied on imports. Additionally, an importer pays 18 per cent GST on the customs assessed value of the timber consignment. For example, if an importer has purchased the timber consignment @ \$285 CNF per cbm, customs might assess it at \$400 per cbm. The customs duty and 18 per cent GST is charged on \$400 per cbm. Hence, the whole tax system puts the importers at loss.”

Industry members point to the need for reform in the sector, which holds promise based on the large catchment of consumer demand in Metros and Tier 1 cities of the country. +



THIBAUD LE MOIGN

Export Development Manager, French Timber

A trade association dedicated to promoting French wood products, French Timber's role is to help members export their goods and to develop the advantage of French wood products in export markets around the world. The members are mostly sawmilling companies (softwood and hardwood) as well as some companies producing 'second transformation' goods such as flooring, decking, landscaping products.

Steady growth in India

After a difficult start in 2013, we were able to start profitable and stable partnerships in India with local distributors and manufacturers. Ever since, we have seen a significant rise in the interest for imported wood products. The furniture and carpentry industry is doing quite well and a wider share of the production is being exported. Also, the Indian Government has put measures in place to protect local forest resources so more and more wood products need to be imported.



Export and quality

The main species exported by us are oak and beech. We also used to sell ash but there is an import restriction at the moment so, unfortunately, we cannot export ash lumber to India any more. France is one of the biggest exporters of hardwood lumber in Europe; we are especially famous for the quality of our oak: it has a fine grain, is very dense and is sold after a long and thorough drying process.





We are also one of the main European producers of beech lumber; this species is perfect for all mid-range indoor furniture: it's easy to work with as it's not as hard as other woods; it turns glues and takes stain very well. It is widely used for chairs, tables and indoor furniture; in India, a large part of the beech we supply is thick boards for the door industry.

Target companies

Most of our customers are furniture manufacturers, so we frequently work with project managers who deal with large projects such as hotels or the construction of tall buildings. Our customers are mainly around Bangalore, Mumbai, Chennai and New Delhi where a lot of import and trade companies are located.

Another factor that impacts the cost of the product is the drying process. Lumber needs to be dried before it can be used; this is a technical, time consuming and costly process with hardwoods, especially with oak as it needs to be dried slowly to avoid damaging the wood. Thicker boards need to be air-dried before being sent to the kiln for final drying. In total, the process can take up to two years.

The challenges

Species acceptance and recognition by importers and manufacturers were the major challenges when we started to promote our product in India. At that time, temperate species were not known by most of the players in the business and we had to do a lot of work to promote them.

Volume and pricing

The annual exported volume varies but, in general, average volumes of lumber supplied from France reach around 5000 cubic meter, the vast majority is beech (around 70 per cent) and oak lumber (around 30 per cent). The price of lumber depends on the grade and thickness of wood. Price is mainly driven by the Chinese and European demand. Beech is generally more stable, the prices don't go through as much variation as oak.

Thankfully, every year we came back, we met more and more people who recognized or had heard about oak and beech, and now there is a lot of interest amongst industrial manufacturers to use these in their production. Our products are well adapted to the market whatever the climate conditions as most of them are used for indoor applications; oak is also suitable for outdoor use as its density makes it naturally resistant. The challenges that are still ongoing are customs and phyto-sanitary related.

Certification and its importance

Most of our production is PEFC certified, ensuring the products are issued from a durably managed forest and manufactured in a responsible manner. This is very important for those of our customers who produce products that will be exported to Europe or the USA as the distributors there demand certification. Of course, you can also find FSC certified products in France but in lesser volume. +



WORKING WITH THE INDUSTRY



An interview with Sameer Iqbal Chhapra,
President, Timber Importers Association, Maharashtra, and Timber Federation of India, and CEO, ISC Group

Business before TIA

Timber is a credit-driven industry, where timber importers sell cargo to their buyers at unsecured, long term credit. This credit period ranges from three months to six months. A lot can happen in this period – often buyers do not pay on time and sometimes do not pay at all. This was rampant before the formation of the Association. The timber industry, being unorganized, had no say in policy matters enacted by the state and central governments before the formation of the association. Policies that affected the industry were formulated without consultation with the trade.

Before TIA, unilateral rates of services were being levied by all service providers to the timber industry, such as transport companies, shipping lines, banks, ICDs and CFSs and ports, etc.

The timber industry was never represented at the important conferences and meetings of commercial and economic importance. A few elite members of the timber industry took decisions favoring themselves and misrepresented facts to shape policy matters citing the betterment of the industry, whereas they were working out of selfish interest.

The birth of TIA

The Timber Importers Association – Maharashtra was formed to unite timber importers in Maharashtra under a single umbrella body, so that their issues could be strongly represented at all forums. The vision and the ground work were laid down by my father, late Shri Mohamed Iqbal Chhapra, along with other esteemed colleagues from the industry. Once the like-minded importers grasped the importance of having the association, everything went on smoothly from there on.

Business after TIA

The buyers today pay on time in most cases because they are aware that delayed payments could result in complaints to the association. Once the association receives a complaint against late payers, the names of such buyers are circulated among members, cautioning them against dealing with such unscrupulous buyers. The association has mandated its members to charge 25 per cent advance from all buyers to help importers pay the GST, which now has to be paid upfront during import.

The association is working very hard to convince its members to stop selling on credit, especially unsecured credit. Practices such as selling on unsecured credit are detrimental to the trade in general and gives buyers a sense of entitlement, which is often misused and goes against the importers, most of the time.

The industry is now well represented at various economic, commercial and policy making events and voices the concerns of the industry and fights for the rights and benefits of the trade. At the same time, the association shall not back out of taking its members to task in the rare eventuality that a member does something out of the ordinary.

TIA regularly writes to advisory and regulatory authorities citing impropriety in charges being raised by shipping lines and other service providers to timber importers and manages to keep such service providers in check.

The association is in touch with various ministries and departments that formulate policies that affect the timber industry and puts across the views of the trade and industry for better shaping of such policies, thereby helping the trade and in turn the common man, who is the ultimate consumer of the timber. The association strongly believes in its motto: “Together everyone accomplishes more.”



Outlook

I would like to believe that the outlook for the timber industry on the whole, including imports, is good. But, given the current economic scenario and the invasive and obstructive taxation policies, the timber industry, along with others might not do so well in the coming years. Excessive bureaucratic control is being exercised upon our industry as I am sure is being done on other industries as well. This, coupled with the foreign exchange rates currently prevailing, and a general lack of confidence in the market are factors that shall definitely prevent growth. But then, in this economy, who is looking for growth? I'd be happy with stability.

In theory, the following factors inspire a positive outlook:

- 1) The current government's Make In India policy should drive up demand for timber in India. Many small-scale furniture manufacturing units should be set up under this policy, thereby increasing the demand for timber.
- 2) "Housing For All By 2022", an initiative by the Government of India to provide low cost housing for the impoverished and lower middle class segments of society, will facilitate the construction of low cost housing units and use a lot of timber.
- 3) Indians of the younger generations are moving out of their parents' homes and living by themselves. This is increasing the demand for newer living spaces, which in turn should drive up the demand for timber and allied products.

Pricing for timber

Purchase prices are decided based on current market conditions in India, freight rates for containers / vessels bringing the timber to India, the foreign exchange conversion rate, etc. Sales prices are basically market driven. Sales rates fluctuate quite frequently and easily based on supply and demand and are largely based on quality of the timber as well. The timber industry is quite volatile and cannot be governed by any text reports or theories due to the fact that timber is a natural product.

Timber is of a diverse nature. Timber coming out of the same plantation can be of varied qualities. Some timber will have extremely high sap and bark content, while some timber will have very low sap and bark content. Some timber will have high sap and high bark but yet it can have very nice heart color, whereas some timber will have low sap and low bark content and yet have virtually no heart color. Hence all timber cannot be measured with one yardstick and cannot have a single, general price.

Prices vary from quality to quality, from country to country, from area to area and from plantation to plantation. Many other factors determine the price of timber. Proximity of the cargo to ports and freight rates along with logistics rates also, govern the prices of timber. Other logistics costs also affect the prices of timber, such as loading costs, transport costs in the country of export, etc. If loading is done manually, then the logistics costs are lower which in turn mean lower timber prices. On the other hand, if machines are used for loading, then that would mean a higher cost of logistics, thereby a higher cost of timber.

The prevalent foreign exchange rates in India also contribute to the market prices of timber. Likewise, the foreign exchange rate in exporting countries play a huge role in the timber rates. A stronger exporting country currency rate will mean a higher price and a weaker exporting country currency rate will mean a lower price.

Quarantine challenges

Timber is permitted for import into India, only after it has been fumigated by methyl bromide at origin, before shipment. Because methyl bromide is a poisonous gas and because it depletes the stratospheric ozone layer, methyl bromide is being phased out around the world, pursuant to the obligations of those countries under the Montreal Protocol on Substances that Deplete the Ozone Layer (Protocol) and the Clean Air Act (CAA). Many countries have already completely banned the use of methyl

bromide in line with their local laws. Exporting countries are using various other fumigation products with newer and safer technologies such as aluminum phosphine and sulfuryl fluoride. However, these new fumigation chemicals/products are yet to gain acceptance by our country.

This is a matter of great concern for timber importers because the Plant Quarantine Order 2003 says that timber has to be fumigated by methyl bromide at the port of loading. There are no other chemicals mentioned in the Plant Quarantine Order which could be considered as equivalents or alternatives to methyl bromide. Hence, this closes the option of buying from those countries, thereby making India uncompetitive on the global map of timber purchases. Also, in the absence of treatment by methyl bromide, if timber consignments arrive in India, they are penalized at four times the normal inspection fee of plant quarantine authorities.

Certification

Around the world, FSC is one of the most important certifications for timber. FSC proves that the timber is harvested from legal, renewable and sustainable sources. However, there is no compulsion in India to buy certified timber. Certain companies emphasize and insist that the timber sourced by them should be FSC-certified. However, that is solely because this timber will be processed into furniture and products that will be exported to Europe or to USA. These markets require timber products to be made out of certified timber.

However, all in all, there is not much importance given to certified timber in India. Having said that, it is pertinent to mention here that despite the absence of certification, almost 100 per cent of timber being imported into India does come from legal, renewable and sustainable sources, therefore making such certifications unnecessary. +

UTILIZE LAND RESOURCES BETTER

Support agroforestry

India imports Rs 50,000 crore worth of wood and wood products annually. The main reason behind this is the sub-optimal utilization of our land resources. Twenty-two per cent of India is natural forest land, the production of timber from them is a meager 3.175 million cubic meters as per the last assessment by Forest Survey of India. This situation is mainly owing to restrictions on felling or harvesting. Compared to this, the Trees Outside Forests (TOF) in the country give a potential production of more than 74 million cubic meters as per the last FSI assessment. Land to the tune of 90-100 million hectares is classified as wasteland in the country. Despite having half of our country's land area under agriculture, agroforestry is practiced only on eight per cent of the cultivated area. Therefore, despite a huge potential of agroforestry in the country, the government and private sector have not focused on producing timber on farms and private lands. Lack of support to agroforestry is making us dependent on wood imports despite the soils of our land being so productive.

Imports-exports

As per last update, India imported around USD 6.7 billion worth of wood (for around 18 million cubic mtrs) in 2015 and exported about USD 2 billion worth of wood/wood products (for 3.9 million cubic mtrs) for the same year. Teak, Meranti, Mahogany, Pine, Fir, White Oak and Birch are imported by India. The wood species exported by India are mainly Shisham, Mango, Eucalyptus, Poplar, Babul, Red Sanders or Red Sandalwood and aromatic Sandalwood.

Challenges: the export-import policy

India has prohibited the export of round logs as per the existing export-import policy. Therefore, only processed wood or wood products are permitted for export. Recently, CITES's



**An interview with
Ajay Kumar Saxena,**
Former Deputy Director,
Network for Certification and
Conservation of Forests.

amendment of all *Dalbergia* species being included in Appendix II of the convention posed a big implementation challenge for the country as a widely grown Indian species of same genus called *Dalbergia sissoo* (Shisham) was also restricted for export, leading to formulation of Vriksh standard to comply with CITES by Export Promotion Council for Handicrafts by Ministry of Commerce.

There are many other species in the country such as Red Sanders, Sandalwood, *Taxus Wallichiana*, *Cycas Beddomei* etc. which are regulated for export under CITES convention, that pose challenges to exporters. Also, there are other challenges such as unsustainable harvesting, timber legality, plant quarantine issues etc.

On the import side, there are many challenges such as wood prices, geographical distances of wood exporting countries translating to increased costs, illegalities in wood harvesting in countries

of origin, plant quarantine issues, wood quality issues, competition with domestic wood species etc.

Forest certification

According to FAO, forest certification is a voluntary process whereby an independent third party ("certifier") assesses the quality of forest management and production against a set of requirements ("standards") predetermined by a public or private certification organization. It is relatively new practice in India and various certification scheme-developing organizations such as FSC, PEFC, Rainforest Alliance, NCCF, etc. are devoting their efforts to develop certification standards for India and certify forests and plantations. It is different in India compared to other countries as certification standards are specific to the country as India is young in forest certification arena, as well as has a wide complexity of forest types, land tenures, various types of plantations and Trees Outside Forests (TOF).

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AMERICAN HARDWOOD EXPORT COUNCIL

The American Hardwood advantage

India's export of wood-based products, which mainly comprise wood furniture, more than doubled from USD 500 million in 2010 to USD 1.05 billion in 2017. Latest data indicates that exports increased a further seven per cent to around USD 1.13 billion in 2018. Last year, 40 per cent of exports were destined for the United States and 31 per cent for the EU.

Much of the product exported to the US and the EU is sold to big corporations now being targeted by regulators and environmentalists in their efforts to reduce illegal logging in wood supply countries. The introduction and tightening of laws makes importers of all wood products, including furniture, liable to sanction if any illegal wood is identified in the products they sell. In 2018, countries implementing these laws, which include the United States, the whole of the EU, Australia, Japan and South Korea, accounted for over three quarters of the total value of India's wood product exports.

The sanctions for failure to comply with these laws can be severe. This is most vividly illustrated by the USD 13.5 million-fine imposed on Lumber Liquidators for US Lacey Act violations in relation to flooring manufactured in China from hardwood sourced from Russia and Myanmar. To date the largest sanction imposed for non-conformance to the EU Timber Regulation (EUTR) is a fine of EUR 80,000 in Sweden linked to imports of Myanmar teak. On top of the direct financial effect of these sanctions is the severe reputational damage due to prosecution.

Against this background, the ability of wood product suppliers to deal with the related challenges of tightening wood supply and legality assurance has become a major competitiveness issue. So much so that two countries that are key competitors to India in the international furniture sector have entered into so-called "FLEGT" Voluntary Partnership Agreements with the EU. Under the terms of these agreements, governments commit to develop comprehensive "legality licensing" systems to ensure no illegal wood enters the supply chain, including tracking all the way from forest to point of export. Once these systems are in place, no wood product can be exported to the EU unless covered by a "FLEGT license". Although targeting exports to the EU, many countries signing up to VPAs have chosen to apply the same licensing procedures to all their wood exports.

Having signed and made far-reaching commitments to these VPAs, the countries concerned are keen to see a significant market advantage. This is increasing the pressure on the EU authorities to demonstrate that the EUTR is being enforced effectively and to ensure very close scrutiny of the legality of wood products from countries outside the VPA network. European authorities are already closely watching the rapid rise in EU wood furniture imports from India – a rise which is significantly more rapid than from Indonesia which already supplies FLEGT licensed products. Recent feedback from surveys of European furniture importers reveal that India is regarded as one of the most



Rupert Oliver,
Consultant, AHEC, Sustainability.

difficult countries from which to obtain reliable assurances of the legal origin of products, more challenging than from suppliers in Vietnam, Brazil, China, Russia, even several countries in sub-Saharan Africa.

How then can Indian manufacturers convert this challenge to their advantage? One approach is to rely on private sector certification systems like FSC and PEFC to provide the legality assurances required by customers. Certainly, these systems can help in some countries, but they don't provide all the answers, and in some ways just create more problems.

Indian manufacturers have very little access to certified hardwood supplies which are concentrated in Europe, and certification has never been successfully applied on a large scale to smallholders outside that region. It's also becoming increasingly clear to importers in the United States and the EU that procurement of certified wood is no reliable assurance against



prosecution. In the UK, a UK importer was recently fined for a failure to comply with EUTR in a case involving FSC-certified Ayous from Cameroon. Meanwhile, allegations of widespread illegality have emerged in relation to FSC-certified products from China and Ukraine.

The strategy adopted by Indonesia and Vietnam, to sign a FLEGT VPA with the EU, is more robust in the sense that a FLEGT license, unlike FSC or PEFC, is recognized by the EU authorities as proof of legality. However, in the case of India, FLEGT licensing would be a “sledgehammer to crack a nut”. This approach is unlikely to appeal to, or to be politically acceptable for, a country as large and complex as India, where the wood industry traditionally has been less export oriented and which is heavily dependent on imported wood.

Indian manufacturers need to identify more efficient and politically realistic

ways to satisfy the legal obligations of customers. Fortunately, these are not hard to find; all that is really needed is an understanding of the legal obligations of overseas customers. While the details of the various laws introduced in the US, EU and Australia differ, they all share one critical feature. They are all risk-based. The need for far-reaching measures to track wood to individual forest management unit, or to seek FSC or PEFC certification of supply chains, apply only to those countries, or regions, where there is a risk of illegal harvest. If the risk can be shown to be “negligible” at national level (using the terminology of EUTR), then there is no need to trace timber further than to the port of export from the supply country.

This opens the door to a very simple solution for Indian manufacturers interested in expanding markets for their products in the EU and the US. They could choose to manufacture their products

using wood imported from countries where there is a negligible risk of illegal harvest. Of course, there are many wood exporting industries that claim all their wood is legally sourced. However only one globally significant supplier of hardwoods, the United States, has invested time and resources to ensure this is independently demonstrated and documented to ensure conformance to laws like the Lacey Act and EUTR. By using American hardwoods, Indian wood product manufacturers can transform laws like EUTR and Lacey Act from a threat to their competitiveness, into a major opportunity.

There is reliable forest inventory data, collected at regular intervals for nearly a century, to confirm that the resource is not only abundant, but are expanding rapidly. There is a tremendous opportunity to combine Indian woodworking skills and styles with American hardwoods to produce globally competitive furniture products. +



KASHIF MUKADAM

Mukadam Enterprises, Mumbai



Imports

Wood is one of the major requirements for our country, yet we do not plant trees such as teak for plantation purposes where as other countries do. Naturally, India has become dependent on imports to meet its wood demands. As per my knowledge, wood such as teak hardwood is imported into India. Maximum buyers are in Kandla, Chennai and Mulund who then sell the product all over India. For us, prominent imports are from Costa Rica, Nigeria, Togo, Burma, Brazil and Panama. Our potential targets are saw millers and builders.

Challenges

Challenges keep coming from the government every now and then due to amendment in duty, taxes and shipping companies. Pricing is another challenge; it is dependent on dollar fluctuations.

Representing timber

The Timber Importers' Association was formed with a goal to keep market rates stable. All our local issues are taken care of by the team assigned by our President, Sameer I Chhapra. Issues such as payment and documentation are also handled by them. Our trade has become smoother and there is much more clarity since the formation of TIA.

SAILESH HEMNANI

Brite Timber Corporation, Mumbai



From mid-eighties to now

Even prior to the policy change that banned tree-felling, India had been importing timber from Myanmar and some European countries based on demand. However, that was a small and insignificant volume as compared to what the country was producing in those days.

The current import scenario is varied; volumes have increased steadily in the last three decades and continue to rise as the demand increases. The entire focus has shifted from natural forests to commercial plantation-based timber, as the policies of all the timber producing countries is on protection and sustainability of the produce.

Imports are area-specific

India imports all groups of timber, namely softwoods such as Pinewood, Spruce, Fir and Maplewood, and temperate woods such as Teak, Mahogany, Meranti and many more such species. The hardwoods are a very big category and the main imports are from Malaysian Salwood, MLH (mixed light hardwoods), Okume from Africa and a host of species from the Caribbean Islands, South and Central Americas. The imports are area specific; Kandla and Mundra import maximum softwood and hardwood and a comparatively smaller volume of teak. The south of India is a mixed bag and they import all varieties. The East coast imports lighter woods, mainly. The West i.e. Nhava Sheva handles mainly Teak wood.

The maximum buyers are in Kandla and Mundra because of their geographical conditions and also because they have the largest concentration of saw millers and timber processors.

Prominent imports and global exporters

The total volume of India's timber import should be in the range of almost 200,000m³ per month putting together all the species and

ports. Our prominent imports are from South America: Brazil, Costa Rica and Panama. We often visit these regions and newer suppliers contact us via their Chambers of Commerce and port authority databases. Our potential target audience is saw millers, timber processors, and furniture factories.

The challenges

There are various challenges: we have a host of agencies to go through for clearance of timber imported into India. Every department has their own system and requirement. The major challenge being faced by the trade is with the plant protection department in relation to the fumigation of import cargo.

Formation of timber importers association

The TIA was formed to facilitate stream lined operations related issues with the authorities and also to assist members of the trade in sharing of information, new rules and regulations and procedures. TIA was formed to represent the trade, bring it into the limelight and make it more organized. Initial obstacles faced by TIA included reluctance from members as there had been no such body to promote and organize the trade without any other motive other than promotion and facilitation. Our President, Mr. Sameer I. Chhapra, has managed to run a tight ship with almost all the members adhering to the regulations and compliances as required by the members. The TIA has managed to overcome all hurdles through dialog and transparency in its operations. Regular meetings are called for by the TIA to keep members abreast with the regulations etc.

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Marshalls Wallcoverings, Mumbai

Designer Mona Sharma Menon constantly improves design, colors and materials to carve out a niche in the indian wallpaper industry.

Marshalls Wallcoverings has wallpapered Indian homes for more than four decades, importing wallpaper from renowned manufacturers in Europe and North America to bring the latest trends to India. Director Mona Sharma Menon, daughter of Marshalls founder B K Sharma, says, "With more than ten thousand themes and designs, Marshalls symbolizes reliability, efficiency, and success." The company has recently introduced a digital signature wallpaper collection by designers Krsnaa Mehta and Payal Singhal and opened flagship

showrooms in Worli and Navi Mumbai. "We focus on product quality and are committed to constant improvement. We have introduced cutting-edge protection profiles to increase the lifetime value of wall-coverings. We import antifungal and antibacterial adhesive from the UK, and have a strong base of distributors and suppliers," she says. Marshalls has always innovated designs to sustain the brand in an ever-changing and competitive industry. "Our organization runs on the pillars of speed, discipline, goodness, and ethics."





The advantages of the brand are for the user to see. Marshalls wallpapers take merely a few hours to apply so homes, stores, and offices can be renovated quickly, in about eight hours. “Marshalls has become the preferred choice of homes, hotels, hospitals and retail chains across India. Our wall-coverings are washable, odorless, colorfast and durable, and we have pioneered as the best wallpaper dealer in India,” affirms Menon.

Speaking of the company’s beginnings, Marshalls Wallcoverings was founded by her father, Mr. Baldev Krishan Sharma. Menon and her brother joined the industry at a young age and their spouses were happy to support them. She says, “It was my father’s belief in wallpaper that helped him invest in such a revolutionary product. He was ahead of his time and a true visionary. I always look up to him.”



Entrepreneurship and risk are two sides of the same coin. Believing in their ability to move out of the comfort zone, Marshalls have two verticals today. While Elite Living caters to furnishing brands, Homez takes care of complete home renovations. It has recently launched its in-house manufacturing of digital wall-coverings, catalogs, and modular furniture profiles. Menon aims to make Marshalls a product on every wall due to the bright future of the industry combined with their potential.

Concept-promotion is important to educate the layman about wallcoverings and their benefits. Menon says, “The industry can only flourish in the Indian interiors market by spreading information and educating customers. Though wallpaper is still at a nascent stage, it has potential, with the evolution of design and technology. It has paved the way for opulent yet functional design. Wallpaper is expected to adorn most decorative walls and ceilings in the coming decade.



These days, wallpaper is associated with luxury and style. They come in versatile designs and materials with durability, convenience, and a wide price range. She adds, “My idea of true luxury is the freedom to do what we want to. We are often expected to perform out of duty, compulsion and necessity. I believe that we have one life and must be able to do what we want without any inhibitions or regrets.” +

WALL TO WALL EXTRAVAGANCE

Uber-luxurious wallpaper presents a world of choice for the design-conscious Indian consumer

An upwardly mobile demographic across urban and non-urban markets

has driven demand for improved home interiors, in general, and better quality wallpapers, specifically. Most importers offer a huge portfolio of premium, uber-luxurious wallpaper from brands such as Versace, Armani Casa, Missoni, Esprit and Porsche.

Rohit Gupta, Managing Director, Elementto Lifestyles Pvt Ltd, Mumbai, which represents over 28 brands, ranging from Armani Casa, Missoni, Elitis and Maya Romanoff to Philip Jeffrey and London Art Italy says, "India's wallpaper industry has grown a hundred-fold in the last 15 years." Gupta says, "There are approximately 3000 showrooms selling wallpapers in India. We mainly focus on the mid-and high-end segment of the market."

marshalls wallcoverings, mumbai



adornis adorable wallpapers, mumbai

The best design innovations come from Europe which leads the global wall coverings market at USD 9.81 billion in 2018 (Source : Wall Coverings Market Report 2019-2024, Mordor Intelligence). In fact, it was a trip to the UK that inspired BK Sharma, Founder, Marshalls, to set up his company, in 1975. More recently, Marshalls has collaborated with India Circus to introduce luxurious, tapestry-like wallpapers inspired by the Indian milieu.

Of the four types (vinyl-based, non-woven, paper/ traditional wallpaper and fabric/ textile), India Circus primarily provides non-woven wallpaper. Krsnaa Mehta, Design Director and Founding Partner, India Circus, says, "The real





estate sector in the country is expected to reach USD 1 trillion by 2030, up from USD 120 billion in 2017 (Source : India Brand Equity Foundation). With this, the demand for interior finishing such as wallpapers is expected to provide a significant opportunity for players in the Indian market.” This growth is aided by technology. Mehta says, “With the presence of the internet and e-commerce, the customer has knowhow of all offerings; e-commerce has become a popular distribution channel for wallpaper companies in India.”



excel wallcoverings, kolkata



india circus, mumbai

stc wallpapers, kolkata



soft lite impex pvt. ltd., mumbai

Luxury = sustainability

Luxury is not defined merely by glamor or opulence. It now stands shoulder to shoulder with ‘sustainable’. Tamim Mandasaurwala, Managing Director, Excel Wall Interiors, has matched this trend to his portfolio of offerings. He says, “Excel has always been the trend-setter, bringing all the latest global designs to India such as Versace, Esprit, Porsche, Living Walls etc. Now, we also offer natural wall coverings made of banana leaves, water hyacinth and bamboo.” What makes luxury wallpaper exclusive could be material superiority or being designed by a well-known fashion designer. In terms of material,

the range includes jute, silk or bamboo for design and practical purposes. Moving away from conventional options such as paint, wallpaper may be the next choice for the high-spending buyer. Selling well in most major cities of India, age and geographical location play an important role in the wallpaper industry. Most of the customers are in the age group between 25-45 years of age and are used to a Western-orientated lifestyle.

“Luxury wallpaper comes in different price segments,” says Karan Sharma, Director, Marshalls Wallcoverings, Mumbai. “Wallpaper



excel wallcoverings, kolkata

stc wallpapers, kolkata



elemento lifestyles pvt ltd, mumbai

soft lite impex pvt. ltd., mumbai



has now become a necessity in every modern home. It is a far more practical option when building or renovating a house. However, unlike the booming paint industry, wallpaper does not have the budget to spend on advertisements and promotional activities. We advertise our brands mainly through social media marketing," he adds. However, the wallpaper industry looks bright in the future as the market has grown by 10-15 times in the last 15 years.

Luxury wallpaper includes glass beads, granite granules, suede/velvet finish, foaming, silk, jute, cork, mother-of-pearl, fabric, linen and mica. In fact, there are special techniques used to incorporate the 'wow' factor into luxury wallpaper. The choice of material and quality matters when deciding upon a price range as the price-sensitive Indian user may find it too high.

adornis adorable wallpapers, mumbai

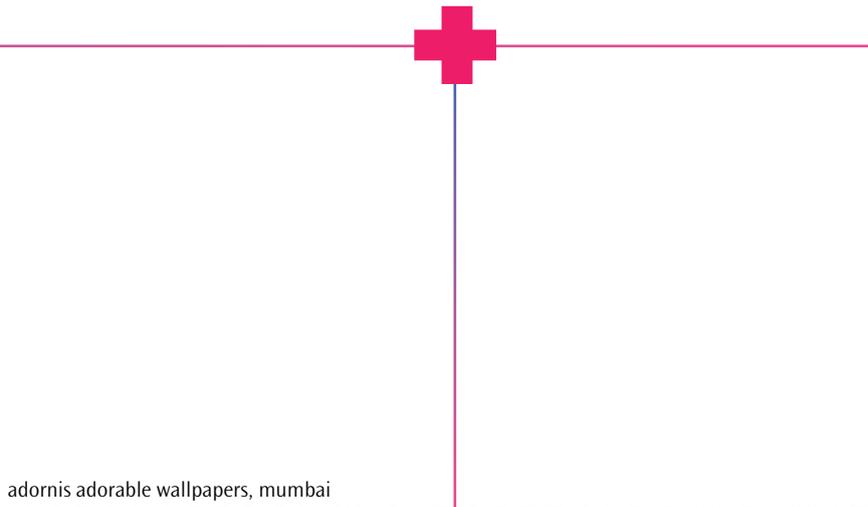




india circus, mumbai



marshalls wallcoverings, mumbai



adornis adorable wallpapers, mumbai



india circus, mumbai

Kedar Mehta, Owner, Adornis Adorable Wallpapers, says, "Each roll of regular wallpaper can cost anywhere between INR 20 to INR 40 per sq ft, while luxury wallpaper can cost between INR 50 to INR 500 per sq ft (depending on material and design)."

The Indian wallpaper industry is on a growth trajectory with several suppliers moving to export. Adornis is considering expansion into SAARC countries saying, "Though we deal with the domestic market at the moment, we plan to start exporting wallpaper to neighboring countries such as Nepal, Bhutan and Bangladesh." +



KEVAL MEHTA

CEO, ATCO Wallpapers, Mumbai



Industry outlook

Considering the growing demand for wallpaper in the interior design segment, I expect the domestic market to grow at almost 35 to 40 per cent per year for the coming decade.

Current market size

The domestic market is presently at around INR 600-800 crore. The northern and western parts of India are a huge market for the industry as Delhi and Mumbai are major business hubs. Our clients are mainly builders and developers, corporates, hospitality industries, architects and interior designers. Wall cloth or wall fabric is a recent trend in the category of wall coverings as it offers seamless walls at pocket-friendly prices.

Competition

Our competition is mainly from other surface materials like paints, laminates, interior films and now, also from customised and printed wallpapers or media. However, paint is still our biggest competition as the wallpaper trade is not even one per cent of it.

Our beginning

It was around 2011 that we realized the potential that wallpaper had in India. So we approached big brands like SHD, LG Hausys, Hanwha L&C and DID etc of Korea to distribute their designer wallpapers in India. India imports wallpapers because there is no production infrastructure here.

The Comprehensive Economic Partnership Agreement (CEPA) agreement with Korea and the Asia-Pacific Trade Agreement (APTA) reduce custom duties substantially. Import has become easier than before as it has become more transparent and hassle-free. While, at first, ATCO imported wallpapers

mainly from South Korea, China acquired a major share of India's trade in 2017. This motivated us to partner with exporters from China; their wallpapers are highly customizable and pocket-friendly.

With a current market share of three to five per cent, ATCO trades in wallpapers across different categories, ranging from PVC, non-woven, duplex and acrylic to natural materials like cork, mica, strings, paperware, aluminium, grass cloth, velvet, glass beads, fabrics, jute and silk.



ROHIT GUPTA

Managing Director,
Elementto Lifestyles Pvt. Ltd.,
Mumbai

Introduction

Since 2006, Elementto has represented more than 28 brands such as Armani Casa, Missoni, Elitis, Maya Romanoff, Phillip Jeffries and LondonArt Italy. We focus on the mid and high-end segments of the market. Designed by the best European and American designers, our wallpaper designs stand out in the Indian wallpaper market.

Every year, we introduce 40 to 50 new collections with innovative designs while maintaining superior product quality. We focus on the top interior designer and architecture firms who work for high-end hotels, residences and corporate offices.

The domestic market

The wallpaper business has grown hundred-fold in the last 15 years and there are almost 2500 to 3000 showrooms today. Many paint and fabric companies have added wallpaper to their product offerings. However, the market is completely dependent on imports as there are no manufacturing factories in India.

Wallpaper is manufactured and exported by countries such as Italy, the USA and China. There are more than 300 importers who supply to the mass market with imports from China.

The good news

The customs duty has recently gone down, from 33 per cent to 10-20 per cent. This has helped to substantially reduce the cost of wallpaper in India.

Bangalore is a very big market for contract wallpaper because of the many software companies there and a sizeable number of residential projects too. The biggest market, however, is in Mumbai, followed by New Delhi, Bangalore, Hyderabad, Chennai, Punjab and Kolkata.

Challenges

The challenge is to track the trade policies and the production capacity of the countries that one imports from. One needs to be updated with all the latest international design trends and innovations to bring them to the Indian market. Also, a steady promotion of the product category is required along with regular participation in various events and fairs related to the industry, to make new business connects.



TAMIM MANDSAURWALA

Managing Director, Excel Wall Interiors, Kolkata

Make in India

Digital wallpaper printing has emerged as a major wallpaper printing technology in India and is the only type of wallpaper that can be produced here. The rest is mostly imported, from countries like Korea, China, Europe, Germany and the U.S.A.

Domestic market

Rapid urbanization and increasing disposable income have resulted in substantial growth of the hospitality sector. The wallpaper industry is witnessing significant progress and there is scope for the market to flourish in the coming years. Major cities like New Delhi, Mumbai, Bangalore, Hyderabad, Ahmedabad, Chennai, Kolkata, Surat and Pune present good sale opportunities.

Design trends

There are wallpapers in rich colors, dimensional fabrics and unique design patterns. Customisable wall coverings are the latest trend where one can select the desired colors and patterns.

Challenges

Lack of awareness amongst potential buyers; the other is the unavailability of skilled labour. The All India Wallpaper Association (AIWA) was formed to address and overcome these issues.

Years ahead

The market is growing at the rate of 30 per cent per year and I believe that it will develop into more than a Rs 5000 crore industry in the next decade.



MITESH GADA

Director, Macro Wallpaper, Mumbai



Introduction

Macro is an importer, trader and distributor of all kinds of wallpaper (established February 2014). We import 75 per cent of our products and the rest is manufactured here. Initially, we focused on dealers; now, though, we are targeting end consumers too.

Our passion for innovation has helped us survive and grow in this competitive market.

We introduce trending global designs to the Indian market. Our product categories include customisable and readymade wallpaper, artificial and vertical garden grass, frames, canvas art and luxury vinyl tile. We have around 1250 dealers across the country. Mumbai is our main market.

Domestic market

Our wallpaper is imported mainly from China, Europe and Korea. Wallpaper has now positioned itself as a luxury interior product. Though the paint industry leads the market, wallpaper is catching up. The multiple benefits of wallpaper convince consumers to consider it. Both manufactured and imported wallpaper is graded by the thickness, represented by GSM (grams per square meter). The brand value is also considered while rating products.

Challenges

We face a major competition from importers who flood the market with semi-defective wallpaper of inferior quality at cheap prices. A major challenge is to create brand awareness in today's competitive market.

Trends

3D and embossed wallpaper are trending globally.



ANANT SHROFF

Founder, STC Wallpapers, Kolkata



Introduction

STC started importing wallpaper in 2010. Just nine years later, it has more than a thousand dealers all over India. We import 80 per cent of our stock from China, Korea, USA, UK and other European countries and are the fifth-largest importer of wallpaper in India.

We were the first to bring 3D embossing printing technology into India. Our wallpaper is available in the broad price range of INR 25 to INR 400 per sq ft. We also offer our clients the option of customization. Our head office is anchored in Kolkata and we have opened branches in Mumbai and Delhi this year, with plans for further expansion. Our target customers are retailers, dealers, distributors, architects and interior decorators.

Domestic market

India's wallpaper industry is quite small as compared to paint. However, the gap is getting smaller every year. Today, the retail wallpaper market is around US\$ 125-150 mn. In India, wallpaper is mainly imported from China and various European countries.

Wallpaper imported from China is mostly made of vinyl and those imported from the European countries are made of non-woven material which is environmentally friendly and comparatively more expensive than the former.

Trends

Customers demand customisable wallpaper these days. With a team of ten in-house designers, we can meet this demand. 3D wallpaper is the current design trend in the wallpaper industry.

Competition

We face strong competition from the paint industry, which has a bigger market than wallpaper.

KEDAR MEHTA

Owner, Adornis Adorable Wallpapers, Mumbai



Introduction

Adornis was founded by my father Mr. Kirit Mehta, in 1992. It was a family business and he struggled a lot to make the company what it is today. I helped my father when I was not attending college lectures. He insisted I learn as much as I could under his guidance as I would be handling the business in the future. I joined full-time after graduation in 1997. We began importing wallpaper from manufacturers from all over the world. We started with two collections in 2010. Today, we have more than 70 collections / catalogues and we order a thousand copies of each to be distributed to our customers. We offer wallpaper, wall-coverings, artificial grass and blinds.

Company

We import and supply wallpaper from global wallpaper manufacturing companies from the USA, Netherlands, Germany, South Korea, and Russia and sell them to our pan-India client base. Some of the high-end brands we distribute through our premium label Studio 248 are Novamur, Holden, Hohenberger, Wallquest and S.K. Filson. We offer traditional and contemporary designs such as stripes, metallic, modern, abstract, plain, stylized florals, damasks and abstract. We supply to the southern states from our Bengaluru office and cater to the rest of the country from Mumbai.

Manufacturing

Wallpaper is made with woven, regular or pure paper as the base. The paper is placed in the machine and printed

upon. Or, embossing rolls are used to create the pattern. Colors are added to the design after that – and the wallpaper is now a finished product. It is then cut into rolls, packed and labelled, ready to be distributed to clients. A factory in South Korea can produce 300-400 rolls of wallpaper in a day, and the amount depends upon the machinery used.

Domestic Market

The wallpaper industry in India is a rapidly growing market; there has been a 10x growth in the last five years or so. Earlier, we had to go to manufacturers and ask to distribute their products. Now, they come to us of their own accord. They see India as a potential market and are eager to sell their products here. Architects, interior designers, dealers, distributors, shopkeepers, and showroom owners form our clientele base as they buy in bulk quantity. We are planning to export wallpaper to neighboring countries such as Bhutan, Bangladesh, and Nepal as well. Contrary to what people think, wallpaper is perfect for all kinds of budgets. It doesn't leave behind dust or smell, works within your daily routine and its application can be completed in a couple of days.

Trends

Abstract, geometric and 3D art is trending. We see many Indian designs from Rajasthan, Kashmir and other parts of India as well. The best thing about wallpaper is that any design can be printed on it, so it can be easily personalized. We are also focusing on



printed blinds on a natural base (paper and jute), and plan to install machinery and technology to produce digital wallpaper.

Challenges

Unlike other industries, this sector cannot spend on advertisements. People need to be educated about the benefits of wallpaper over paint and this can be quite expensive. Customer satisfaction has to be taken care of as well, as one customer's review can affect the entire industry. On the market front, we have to deal with fake products with the exact color and design. Of course, they definitely cannot replicate the same high quality. We have to keep reinventing our brand, consider price reduction and offer special discounts to appeal to the Indian market.



Super Chrome Finish Coating: Sirca Paints India

Sirca Paints India Ltd, India's leading company in wood coating industry, launches Super Chrome Finish Coating. A high quality product which can be applied on leather, metal, plastic, glass and wood, it is the industry's brightest and most reflective chrome coating. Colors such as Rose Gold, Gold bronze, Nickle, Grey and Copper brown can be applied upon chrome. The product comes with a 25-year warranty and is for interior and exterior use.

Price: Upon request
Website: www.sircapaints.com

THE LATEST PRODUCTS

Antracite by Kalesinterflex: Classic Marble Company

Antracite is part of Kalesinterflex 'Luxury Cement' collection, designed and developed especially for wall cladding and façade applications. Available in India through CMC, its standard dimensions are 3000mm x 1000mm and in thickness choices of 5mm and 3mm.

The cement grey tiles lend a rich composition with subtlety to the applied surfaces. Its flexibility allows the porcelain slab to be installed even over curved surfaces.

Price: Upon request
Website: <http://www.classicmarble.com>



High quality felt: Féline

A new Dutch brand, Féline specializes in high quality felt, with a focus on combining aesthetics, acoustic values and sustainability. The brand will launch two trendy felt collections with optimal acoustic performance. The Fresco Collection is a line of natural wool that is mulesing free while the Minimal Art Collection is derived from the recycling of plastic bottles. The trendy color range makes these fabrics highly suitable for a wide range of design applications. Backings such as self-adhesives and paper can be applied based on the customer requirements.

Price: Upon request
Website: www.felinefabrics.com



Vertical Collection: Havwoods

The Vertical Collection is unique because it is meant for flat surfaces apart from floors. Made from natural materials, it is planed, profiled and sanded to 21st century tolerances creating boards that are as straight, flat and consistent as those milled from newly felled timber.

Price Range: Rs. 600 to Rs. 2700.
Website: www.havwoods.in



HI-MACS® Ultra-Thermoforming: LG Hausys

HI-MACS® Ultra-Thermoforming is an innovative formula that pushes boundaries of solid surface shaping to a whole new level with 30 per cent more thermoplastic capabilities. The innovative formula allows for more dramatic shaping: the minimum internal radius of 6mm (previously 50mm) opens a whole new design dimension. The new product is more flexible thanks to the thermoforming process, which allows designers to create much sharper curves and organic designs. More accentuated curves can be achieved now without compromising the properties of the material. HI-MACS® remains resistant, easy to work with and to look after.

Price: Upon request
Website: www.himacs.eu

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Onici: Casalgrande Padana

The Onici collection of marble-effect porcelain stoneware from Casalgrande Padana has been designed to satisfy a transversal demand for style. The range encompasses six different textures, all of which are inspired by the beauty of quartz, a natural material which forms the basis of Onici. Onici is recommended for both flooring and tiling in a range of indoor and outdoor settings. Suitable for all settings, Casalgrande Padana porcelain stoneware is hygienic and capable of eliminating the main bacterial strains thanks to its Bios Antibacterial technology.

Price: Upon request
Website: www.casalgrandepadana.com/en/

Microcement: Super Surfaces

Microcementing is a new way to transform the space around you, giving a natural effect and adding great architectural value to any environment that needs to be covered, renewed or created from scratch. It is perfect for private homes, from kitchen to bathroom, equally beneficial for businesses, showrooms or exterior areas, be it for poolside, restaurant or a studio. With Micro topping you can create an airy, linear and spacious ambience and give rein to your ideas, seamlessly.

Price: 450 per sq ft, may vary depending on the scale of the project.
Website: <https://supersurfaces.in>





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AHEC, Adam Markowitz and Marcus Piper collaborated on 'Oak REDEFINED', an installation exploring American red oak from multiple perspectives. Both natural and thermally-modified American red oak was selected for the collaboration with designer and architect, Adam Markowitz and top graphic artist, Marcus Piper, who came together to create a space in which to relax, recharge and reconnect with a thoughtfully designed environment. So vast is the U.S. hardwood forest that all of the 2.75 cubic meters of red oak lumber used to create the installation would be replaced through natural regeneration in just 3.15 seconds.



For more information visit www.americanhardwood.org