

No.CAPEXIL/ER/UG/CERAMICS/16-17/**135**  17th February, 2017

**To**

**All Members of Ceramics & Allied Products**

**including Refractories Panel of CAPEXIL**

Dear Sir,

**Sub: Minutes of the 1st Meeting (2016-17) of Ceramics & Allied**

 **Products incldg. Refractories Panel held on 17th December,**

 **2016 at 12-00 Noon at Ahmedabad.**

Please find attached the Minutes of the 1st Meeting (2016-17) of Ceramics & Allied Products including Refractories Panel duly approved by the Chairman – Ceramics & Allied Products incldg. Refractories Panel held on 17th December, 2016 at 12-00 Noon at Ahmedabad for your perusal & ready reference.

Thanking you,

Yours faithfully,

Uttam Ghosh

Executive Officer

Encl: As above



**CAPEXIL**

**DRAFT**

**MINUTES OF THE 1ST MEETING (2016-17) OF THE CERAMICS & ALLIED PRODUCTS INCLDG. REFRACTORIES PANEL HELD ON 17TH DECEMBER, 2016 AT 12-00 NOON AT AHMEDABAD**

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**Sl. Name of the Representative Firm Representing**

**No.**

1. Mr. S.K. Ghosh (In the Chair) M/s. Allied Ceramics Pvt. Ltd., Kolkata

2. Mr. Nilesh Jetpariya M/s. Sonex Industries, Morbi

3. Mr. K.G. Kundariya M/s. Win-Tel Ceramics Pvt. Ltd., Morbi

4. Mr. Bhavesh R. Bopaliya M/s. Solo Ceramics, Morbi

5. Mr. Yogesh Patel M/s. Om Ceramic Industries, Wankaner

6. Mr. Bhavesh Patel M/s. Welcome Tiles Pvt. Ltd., Morbi

7. Mr. Hardik Bhalodiya M/s. Redstone Granito Pvt. Ltd.,Wankaner

8. Mr. Devendra jain M/s. Metro Trade Chem, Ahmedabad

9. Mr. Rajubhai M/s. Siddhi Agro Inn

10 Mr. T.K. Bhattacharyya Capexil’s Secretariat

11. Mr. C.M. Dayanandan -do-

12. Mr. Uttam Ghosh -do-

 Mr. S.K. Ghosh, Chairman, Ceramics & Allied Products incldg. Refractories Panel welcomed the members present at the 1st meeting (2016-17) of the Ceramics & Allied Products incldg. Refractories Panel. The agenda items were thereafter taken up for discussion.

**Itam No. 1 : Nomination of a Vice-chairman of the Panel for the current period.**

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 The Chairman nominated Mr. Nilesh Jetpariya of M/s. Stonex Internatinal, Morbi as Vice-Chairman of the Panel for the current period and the same was seconded by Mr. K.G. Kundariya.

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**Item No. 3 : Review of current trend in export of different items of the panel**

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Initiating the discussion Mr. S.K. Ghosh stated that the overall export of the panel during 2015-16 had been recorded at US$ 991.67 million as against US$ 930.15 million attained during the same period of preceding year. During April-August 2016, overall export of the Panel has been recorded at US$ 494.28 million as against US$ 413.20 million attained during the same period of the last year. The Chairman pointed out that even the overall Indian export was going down in the last 18/19 months, there is a growth of 19.62% during the period April-August 2016-17 compared to the same period of last year i.e. 2015-16 in the Ceramic Products.

Members present analysed export performance for the last three years and it was revealed that export performance has increased 6.6% during 2015-16 in comparison to last year whereas during 2014-15, it was increased 45.76% compared to last year i.e. 2013-14.

Mr. K.G. Kudariya has reported at the meeting that as per trend in export of Ceramic Tiles & Sanitaryware itself will cross the figure of US$ 600 million during 2016-17.

While reviewing export of the panel Mr. S.K. Ghosh informed the members that the surge in export during 2015-16 was primarily due to sizeable growth in export on certain items like Ceramic Tiles, Refractory Bricks, Sanitaryware, Ceramic Products n.e.s. etc. our export might grow further. In this regard Mr. Ghosh and other members also mentioned that there might be some decline in export of a few products but an ambitious plan to raise export of Ceramic Tiles & Sanitaryware.

In summing up the discussion the members felt that on the whole export of Ceramics & Allied Products including Refractories Panel might grow further during 2016-17.

**Itam No. 4 : Fixation of itemwise export target of the panel for 2016-17.**

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Mr. S.K. Ghosh informed the members that the Committee of the Council had adopted an overall export target of US$ 1041.25 million in respect of Ceramics & Allied Products incldg. Refractories Panel for 2016-17 and thereafter he requested the members to fix itemwise export target for the current year. After detailed discussion the members present adopted an export target of US$ 1041.25 million in respect of Ceramics & Allied Products incldg. Refractories Panel for 2016-17 with following itemwise break up :-

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| **Value in US$ Million** |
| **Item Description** | **Export Target for 2016-17** |
| Asbestos jointings | 7.28 |
| Ceramic products nes | 66.53 |
| Ceramic tiles | 591.08 |
| Emery | 2.16 |
| Insulators | 44.03 |
| Other asbestos products | 8.55 |
| Refractory bricks | 129.37 |

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| **Value in US$ Million** |
| **Item Description** | **Export Target for 2016-17** |
| Refractory materials | 79.20 |
| Roofing tiles | 0.25 |
| Sanitaryware | 87.64 |
| Tableware/kitchenware/potteryware | 25.17 |
| **TOTAL** | **1041.25** |

**Itam No. 5 : Challenges / constraints faced by the members for export promotion activities.**

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Mr. Nilesh Jetpariya of M/s. Stonex International pointed that to conserve the Indian Natural Resources, like China, Government may ban on export of mineral products used in Ceramic Industry as raw material viz. Feldspar, Quartz, Ball Clay, China Clay, etc.

**Itam No. 5 : Proposal for Technology Upgradation of Ceramics & Allied Products incldg. Refractories and providing continuous support on Research & Development for achieving quantum jump in exports.**

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The Chairman pointed out that presently our country is exporting traditional ceramic items namely Ceramic Tiles, Sanitaryware, Tableware, Electrical Porcelain Insulators and Refractories. It is worth mentioning that Ceramic Panel products are showing highest export growth in percentage term in the basket of products assigned to CAPEXIL. Exports of Ceramic Tiles are showing continuous export growth during the last few years.

He also pointed out that there is no doubt about enough scope for increase of export of the items of ceramics panel if required supports are made available under technology upgradation and continuous support of research & development for achieving quantum jump as mentioned herein below:

**Raw Materials Benefication**

For all sectors of ceramic industries to obtain standard quality of raw materials is a persistent problem. Installation of the common benefication plant for Ball Clay at Bikaner (Rajasthan) & Thangarh (Gujarat) so that all the mines at those regions can use this common facility, the current rate of fired goods rejection would be minimized and save national waste of minerals. Environmental Pollution would be minimized in the process.

For Refractory Industries, benefication of Raw Materials is required for (A) elimination/reduction in content of Iron Oxide and Lime from Bauxite, (B) for elimination of Silicon Di-Oxide from Magnesite, (C) for conversion of Beach Sand to Mullite.

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**Wall Tiles/Ceramic Tiles**

Wall Tiles Manufacturing Units can be modernized by installing Digital Printing Machine which will enable them to produce International Standard Products. This Digital Printing Technology & Machine is not available in the country and cost of import is prohibitively costly. It is needed to develop the aforesaid Digital Printing Machine in the country so that units in the MSME Sector can also modernize their units to add further increase in export of the item.

**Vitrified Tiles**

We are to modernize their manufacturing process to produce lighter weight tiles to compete in the international market mainly due to high cost of freight charge. This industry needs Research & Development support from Government to develop low temperature matured vitrified tiles body to manufacture light weight products. This will help in enhancing export of this product.

**Sanitaryware**

To encourage higher export of sanitarywares, units in the MSME Sector need to be modernized with necessary help for:-

Technical Guidance for Battery Castings & Blow Castings

Reduction of Firing Cycle to a considerable extent for saving in consumption of fuel

Suitable Body Glaze Development to match the shorter firing cycle

Development of Quality Plaster of Paris for making of Moulds

**Disposal of Fired Ceramic Waste**

All the ceramic units suffer from a common problem of disposing of their fired ceramic waste. Immediate attention needs to be given by the Government to find out the ways and means to solve the problem. The best way may be to conduct research for recycling of the said waste which will help in reduction in cost of production. As an interim measure the waste may be utilized as a Raw Material for construction of Roads particularly while laying the foundation.

He further stated that CAPEXIL has already moved the proposal to Govt. of India and concerned National Laboratories for support & implementation.

**Itam No. 6 : Survival of Domestic Ceramic Insulator Industry**

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The Chairman informed that Ceramic Insulator Industry has serviced Indian Power Sector for the past five decades and currently undergoing unprecedented crisis for its survival and thereby endangering the livelihood of its employees.

The Indian domestic ceramic insulator industry was adversely affected arising out of cheaper imports of porcelain insulator from China which significantly increased although the average life cycle of porcelain insulator is 8 to 9 years based on the global experience in countries with less pollution levels and cleaner environment. Polymer being an organic material it suffers from gradually decline in performance due to aeging. On the other hand ceramic insulator is proven and used worldwide with produce life cycle extending upto 50 to 60 years based on periodic maintenance and right selection of insulator relative to pollution levels. Further, summing up the discussion, the Chairman, Mr. S.K. Ghosh was authorized to take up the matter with concerned authorities for coming to rescue of the industry.

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**Itam No. 7 : Participation of the members of the panel in international fairs/exhibitions during 2016-17.**

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Mr. S.K. Ghosh informed the members about approved export promotion programme abroad for execution during 2016-17.

He also informed the members that during February 7-9, 2017 CAPEXIL is being planned to organize Reverse Buyer Seller Meet with 30 Importers on Ceramic Products at Ahmedabad & Morbi. He invited the members for their active participation and it will offer good scope for meeting with buyers/importers and also for securing business wherever feasible.

The Chairman, Mr. S.K. Ghosh thanked the organizers of Vibrant Ceramics for providing the Venue of the Meeting and warm hospitality.

The meeting thereafter concluded with a vote of thanks to the Chair.

EXECUTIVE DIRECTOR CHAIRMAN

CERAMICS & ALLIED PRODUCTS PANEL