



## CERAGLASS INDIA 2010

An International Trade Fair & Conference on Ceramics, Glass & Allied Products

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### International Conference on Business Opportunities in Ceramics and Glass Industry

Friday 12 November 2010: EPIP, Sitapur Jaipur

### Summary

	Inaugural Session
Issues Deliberated	<ul style="list-style-type: none"> <li>• Investment Opportunities</li> <li>• Use of ceramics and glass in Green Buildings</li> <li>• Manufacturing of new glass through recycled Glass</li> <li>• Need for technical innovation and creativity</li> </ul>
Key Speakers/ Panelists	<ul style="list-style-type: none"> <li>• <b>Dr Purushottam Agarwal</b>, Commissioner, Bureau of Investment Promotion</li> <li>• <b>Dr H S Maiti</b>, Senior Advisor, CSIR</li> <li>• <b>Mr Swapan Guha</b>, President, Indian Ceramics Society</li> <li>• <b>Mr Rajendra Bhanawat</b>, Managing Director, RIICO</li> </ul>
Highlights	<p><b>Dr Purushottam Agarwal</b> started his opening remarks by highlighting the advantages being offered by Rajasthan for the ceramics and glass industry.</p> <p>He mentioned that deposits of most of raw materials like clay, silica sand, gypsum etc, for bulk industries are available within the state. Availability of cheap energy sources in Rajasthan also offers a comparative advantage for the industry.</p> <p>Dr Agarwal expressed his deep concerns on the growing trend of raw material going out of Rajasthan and value addition being made in other states. He also stressed upon expansion of new products and technologies in ceramics and glass sector.</p> <p><b>Dr H S Maiti</b> emphasized on the need for investment in Technology &amp; Skill Development as a crucial factor for the all round development of the ceramics and glass industry in India.</p>

	<p>He mentioned that ceramics and glass sector has been a late starter in technological upgradation process and needs to catch up at a faster pace.</p> <p>Among the demand drivers, Construction, IT/ITeS &amp; Automobile sector have been leading the growth of ceramics and glass industry. He also stated that advanced ceramics remains an untapped area and is expected to grow manifold if provided a push from investment in R&amp;D.</p> <p><b>Mr Swapan Guha</b> while presenting his key note address touched upon the potential of Rajasthan in attracting investments in the ceramic and glass sector.</p> <p>The major cost factor in ceramic manufacturing industries is fuel cost. Liquid fuels like C9 or even F.O are very expensive. Natural gas is an essential fuel for ceramic industry. It is clean and eco-friendly fuel. As it is free from sulphur, it improves the quality of ceramic wares especially white wares like bone china tableware.</p> <p>Very few insulator manufacturers in Rajasthan are now producing high value insulators like Modern insulators. So opportunities are there to setup high value insulator manufacturing units in ceramic hub once natural gas is available there.</p> <p><b>Mr Rajendra Bhanawat</b>, presented the vote of thanks to the eminent panelists and reiterated that demand for ceramics and glass products is bound to increase. As the demand for these products exceeds supply significantly, there are immense business opportunities in the sector.</p> <p>He also mentioned that Rajasthan boasts of the presence of 3Ps i.e. Place, Policy and People which reflect its image to attract huge investments in the sector.</p>
Key Takeaways	<ul style="list-style-type: none"> <li>• In India, there is no manufacturing unit for Porcelain Tableware. If we get natural gas, which is sulphur free clean fuel, then investors can go for setting up of porcelain factory with good production capacity.</li> <li>• Although different types of minerals are available in Rajasthan, the purification processes for raw materials are not up to the standard. To compete globally, there is a strong need to upgrade these processes by incorporating latest technologies.</li> <li>• Investments in value added industries of ceramic and glass products should be enhanced in Rajasthan to check the movement of local raw material to other states.</li> <li>• Two of the major problems pertaining to the ceramics and glass sector: (i) Non-availability of a cluster approach and (ii) Non-availability of gas have been resolved with the upcoming ceramics cluster at Ghilot and the provision of piped gas line, Therefore, the sector is likely to attract huge investments.</li> </ul>

	<b>Session 1 – Investment Opportunities in Ceramics &amp; Glass Industry</b>
Issues Deliberated	<ul style="list-style-type: none"> <li>• Investment in Technology &amp; Skills</li> <li>• Emerging Opportunities for the ceramics and glass industry</li> <li>• Importance of Green Buildings for ceramics and glass industry</li> </ul>
Key Speakers/ Panelists	<ul style="list-style-type: none"> <li>• <b>Mr S N Eisenhower</b>, Director – Operations, Saint Gobain Glass India Ltd</li> <li>• <b>Mr Rakesh Ranjan</b>, Business Head, ITW India</li> <li>• <b>Dr H S Maiti</b>, Senior Advisor, CSIR</li> <li>• <b>Dr Jyotirmay Mathur</b>, Coordinator Center for Energy &amp; Environment, CII GBC Jaipur</li> </ul>
Highlights	<p><b>Mr S N Eisenhower</b> chaired the Panel Discussion. He briefly touched upon the emerging opportunities for the glass industry in the architectural, auto and solar market segments.</p> <p>He mentioned that the demand growth for the last 20 years has been close to 10 %. The per-capita consumption of glass has risen from 0.14 kg in 1989 to 1.05 in 2009.</p> <p>He highlighted the sustainable and green movement, codification and standardization and also described the major trends in the glass industry.</p> <p><b>Mr Rakesh Ranjan</b> shared his views on innovative &amp; sustainable solutions for float glass industry. He also briefed about the challenges in float glass due to its fragile properties that impacts profitability and has safety issues.</p> <p>Mr Ranjan mentioned that India consumes nearly 5.1 million cft of wood for float glass packaging. Three lac trees are being cut every year. The industry should seek to find innovative sustainable solution to the environmental problems.</p> <p>He also emphasized upon investing in people through training and exposure to new technologies.</p> <p><b>Dr H S Maiti</b> emphasized on the need for investment in technology &amp; skills for the ceramics and glass industry. Greater need of R&amp;D in advanced ceramics is crucial for exploring new business opportunities.</p> <p>He stressed upon the fact that every single unit of optical glass used in India is being imported.</p> <p>Dr Maiti highlighted the scope of business opportunities for crystal glass, photonic/fiber glass and fiber optic space sensors. He also stated the importance of technology to boost investment opportunities in India to develop, market and export these products.</p> <p>Investments in advanced ceramics are low at present whereas the</p>

	<p>untapped potential is perhaps is the greatest in this segment.</p> <p><b>Dr Jyotirmay Mathur</b> explained the conceptual framework of green buildings and its importance for the ceramics and glass sector.</p> <p>He mentioned that Building &amp; Construction sector is a major contributor to global warming as it accounts for 25 – 40% of global energy consumption, 30 – 40% of Global Green House Gas Emissions and 30 – 40% of solid waste generation.</p> <p>Dr Mathur highlighted that the productivity of people working in green buildings has found to be 20 % higher. He also mentioned from a case study of a green building with high performance glazing glass that with an incremental cost of Rs 43 lakhs, energy savings were found to be to the tune of Rs. 8.20 lakhs which translates into a Pay-back Period of 5 years.</p>
Key Takeaways	<ul style="list-style-type: none"> <li>• Investment in technology &amp; skill development remain critical to the development of ceramics and glass industry in India.</li> <li>• Rising cost of raw material like soda ash and furnace oil along with excess capacity and logistic costs are the key challenges to the industry.</li> <li>• Green buildings entail a long term benefit for monetary and environmental reasons. The ceramics and glass sector is likely to be a key beneficiary of this growing phenomenon.</li> <li>• Collaboration between industry, government and academia is necessary to ensure sustainable growth of the ceramics and glass industry. Initiatives like carbon neutral SME programmes, standardization programmes and advanced vocational training programmes should be considered.</li> </ul>
	<b>Session 2 – Best Practices in Ceramics &amp; Glass Industry</b>
Issues Deliberated	<ul style="list-style-type: none"> <li>• Specialty Glass &amp; Optical Fibers</li> <li>• Technical Innovation and Creativity</li> <li>• PU Foams &amp; its role in energy savings</li> </ul>
Key Speakers/ Panelists	<ul style="list-style-type: none"> <li>• <b>Dr Indranil Manna</b>, Director, CGCRI</li> <li>• <b>Dr Ranjan Sen</b>, CGCRI</li> <li>• <b>Mr Abhishek Jain</b>, Om Glass Works</li> <li>• <b>Mr Viney Verma</b>, Vice President, McCoy Soudal</li> <li>• <b>Mr Emmanuel De Smedt</b>, McCoy Soudal</li> </ul>
Highlights	<p><b>Dr Indranil Manna</b> started the discussion by imparting that raw material, energy consumption and environmental issues are the most important factors determining the scope of business opportunities in the ceramics</p>

	<p>and glass industry.</p> <p>Giving the example of shift of industries from eastern region to western regions due to high energy costs, Dr Manna highlighted the significance of cheap availability of power to the energy intensive ceramics and glass industry.</p> <p><b>Dr Ranjan Sen</b> shared his views on Speciality Glass &amp; Optical Fibers. He described optical fibres as high value and high technology products. Level of investment in this segment has been low till now, he added.</p> <p>He also briefly explained the technological development and applications of lead free glasses, photonics, fiber bragg grating sensors, high power fiber laser, photonic crystal fiber. Telecommunication, Medical equipments, energy, civil engineering, aero space, oil and gas industries find significant use of these products.</p> <p>There is a strong need for indigenous technology development with the help of partnership between industry and government.</p> <p><b>Mr Abhishek Jain</b> explained the business opportunities in the Firozabad glass cluster. He briefly touched upon the evolution of glass in Firozabad while portraying Firozabad as a hub for glass industries.</p> <p>Mr Jain stated that 85% of the activities in Firozabad are related to glass directly or indirectly. The region boasts of 100 Pot furnaces, 50 Tank furnaces, 700 Pakai bhatti and around 30 automatic factories providing employment for the mass population in and around Firozabad.</p> <p>Till 1996 major fuel used was coal which has now been replaced by natural gas. The advent of natural gas has changed the industry fortune of Firozabad.</p> <p>The glass industry in Firozabad broadly consists of following types of products: - Glass Art ware, Glass bottles, Glass domestic-wares, Scientific Glass and lab ware, Automobile Glass wares, Street Glass and domestic light wares and Glass Beads, he added.</p> <p><b>Mr Viney Verma / Mr Emmanuel De Smedt (Joint Presentation).</b> Highlighted the importance of using right product for right application. They briefed about the range of products based upon latest technological development.</p> <p>The presentation concluded with an example of Door Frame Installation that uses PU foams to install wooden door frames. It is three times faster with same cost as conventional installation method.</p>
Key Takeaways	<ul style="list-style-type: none"> <li>• High energy costs in a region could lead to industries shifting base to other parts of the country. Therefore cheap availability of power to the energy intensive ceramics and glass industry is critical to the success of manufacturing units.</li> </ul>

	<ul style="list-style-type: none"> <li>• Rajasthan offers all the elements required in the processing of glass and hence offers tremendous business opportunities.</li> <li>• Substantial investments in the field of speciality glass and optical fibers are required to make India self reliant in the field of defense, atomic energy and space technologies.</li> </ul>
Participants	The session was well attended by 98 representatives, comprising CEOs and senior executives from ceramics and glass industry, importers & exporters, academicians and policy makers across the country.