

## Questionnaire to understand Flooring

### 1) In brief, what are the types of floorings available and how are they classified as per the use?

Out of many, some flooring options popular in India are – vinyl and Linoleum (both are different although), carpet, wooden laminate and hard wood (again, both are different), natural marble & stone and cement mosaics and various categories of ceramic tiles.

In Indian context, average spend and varied preferences in aesthetics have made ceramic tile the most popular flooring because it performs best on all three important criteria – durability, functionality and aesthetics.

In short, from usage environment perspective, we can classify flooring into three segments

- A. Specific to residential environment, lesser foot-fall and stress levels on floor – here all the options would qualify as wear and tear and other stresses to which flooring is subjected to, are quite less.
- B. Moderate traffic on floor – again, depending upon ‘how moderate’ and life expectancy, many of the options might suite. In any space, not all the floors receive equal traffic and undergo same level of stresses; floor area where lesser wear and tear is expected and moisture or water is not the disturbing element, all options can suit. Italian marble fascinates many in India (aspiration quotient ?) and with some periodical maintenance (re-polishing) marbles, which are softer to resist the erosion by sand brought by shoe soles, can also perform good.
- C. Exterior, higher traffic and Industrial environment – Hard, unpolished stones or simply – Industrial tiles especially made for the purpose address the Industrial part. Coming to commercial spaces, hear wearing unglazed polished vitrified tile or matt finish, Glazed Vitrified tiles suite the most.

In all these usage environments, ceramic tile is the single entity which has options to qualify for all usages. However, one needs to choose the most suitable category as tiles come in different category. In the era where digital printing is a norm, one can get the replica of same marble in different category of tiles. Looks can be deceptive! Always, ask for the help; all responsible manufacturers would be pleased to provide the details.

Through its four Brands Johnson, Marbonite, Porselano and Endura with over 1000 flooring tiles in different compositions, H & R Johnson offers the widest variety of flooring tiles meeting all challenges posed by different flooring conditions.

## **2) What have been the major changes that you have witnessed in flooring industry?**

Flooring is no more just another surface covering building material. The Architect and Interior designers on one hand and the manufacturers on the other have continuously worked to evolved more beautiful, easy to maintain and durable flooring in known built environment. Barring some niche flooring, the ceramic tile Industry has been presenting newer variety of tiles suiting to different environment; right from landscaping area, open to Sun, rains and heavy movement on floor to the cozy interiors of a house. The most obvious change is usage of new variety of ceramic tiles in floor, replacing many other options. We have seen consumer welcoming the new value additions in flooring tiles as we brought in the concept and technology of making floor tiles highly resistant to staining and off-late adding the anti-microbial property, promoting the hygiene without any harmful chemical for the human touch.

Flooring is an integral part of overall ambiance of the space and thus, aesthetics or design front is really well taken by tile makers as many of the tile makers are closely associated with designers. At H & R Johnson, the product design team is multi-dimensional and has interior designers; ceramists as well as people from art field who can related to the design inspirations and create some new floor concepts. The other change is – scale of manufacturing and new technological inputs to make more and better tiles in the factory!

## **3) How big according to you, in terms of value, is the market for flooring industry in India?**

In a developing country like India, the potential is immense! Ceramic tile Industry alone is approx. INR 25,000 Cr and half of that goes to flooring as per one estimate. We can easily add at least twice of this figure for other flooring materials of which natural stone and marble taking a bigger chunk. With liberalization, imported marble also increased its share, value wise. Higher value of majority of marble as compared to average cost of tiles suggests even a bigger share of flooring when combined with other stone, particularly granite and Kota stone. Wooden flooring, carpets, vinyl and carpets are also growing for the differentiation and ease of installation apart from the individual choices.

**4) Are there any particular sectors that according to you are driving the demand for flooring?**

Housing, for sure! Sizeable demand is also coming from renovation which generally happens at the time of ownership change or generally, at intervals of 10-12 years. Rise in commercial space and rising acceptance of heavy duty ceramic tiles as flooring in Industrial segment are other two avenues for flooring suppliers both in new construction as well as renovations.

**5) Could you give us an overview of the Industrial Flooring industry with respect to the growing concern for sustainability and longevity**

Industrial flooring, for a long time depended only on heavy slabs of natural stone or concrete. Today, with our ENDURA Brand experience, we can say that there is a shift and that is increasing only.

If you see how tiles evolved, the first generation tiles were suitable only for the wall application and lighter flooring use in residential environment. It took some time to understand the gap and then came the stronger and robust tiles with advent of technology. Johnson's Endura was the first such initiative in this segment that addressed the challenge first in its R&D laboratories and then commercially made specific to various industrial environment. Heavy movement on the flooring including vehicular movement, stresses and different chemical attack needed suitable solution. These Endura tiles substituted other material due to added advantage - ease of maintenance. Life span of correctly designed industrial tiles is a big advantage and it leaves lesser impact on the environment including lesser usage of cleaning agents (chemicals) to keep the floor clean.

**6) What would be the selection criteria for specific application areas?**

That is a big question and perhaps maximum issues in tiled surfaces can be attributed to the simple fact that often, in want of wholesome understanding of tiles and tiling, the surfaces have been suffering.

Let me say one again, tile is not meant for 'load bearing', its job is to create a robust cover over the existing strong surface for easy maintenance and keep the floor looking good. If we make an informed decision during selection of flooring material, and the installation is done properly, majority of flooring including tiles, will deliver as per our expectations and inherent characteristics of material.

Coming specifically to tile selection, as a thumb rule, the shiny, polished (vitrified or not) tiles should be avoided where heavy foot-fall or material movement is expected on the floor.

Keeping thickness as same, lower the porosity (termed as – water absorption) of tile body, higher the breaking strength. The breaking strength compensates for air-gaps between the sub-surface and the tile due to incorrect tiling process, which is too common in our country.

Coming to residences or the private area flooring, we can use any finish floor tiles without much thinking but in any case, not the weaker ones. All responsible manufacturers provide and follow the technical specifications as per current ISO and Indian Standards. Water absorption up to 6% can do the job. Glazed or unglazed, shiny or matt, can go well in residential environment. Whenever you see something very shining, think twice to use it as flooring in other than residence!

### **7) What are your insights on the opportunities, growing competition, and innovative products and new ideas required to flourish in the market?**

As I mentioned about organized and unorganized segment of tile industry, in last over two decades the Tile Industry in India grew by leaps and bounds. Today you have the availability of ceramic tiles even in backward districts. The credit goes to competition!

In hard flooring, only the natural stone and marble is competing with the ceramic tile. It is not just because of cost...both, tile as well as the natural stones are available in wide range of prices. In fact, due to its positioning and much more affordable price, even after possessing unique technical advantages and close to natural designs, ceramic tile often loses the war with imported, costly Marbles!

India is very potential market as the per capita tile consumption is too low. There are villages and towns where even now 'Pukka-ghar' making process has not completed. Not to forget, huge scale of renovation where old flooring is getting changed to new one!

The opportunities exist in low, middle and higher budget flooring equally although, the first two segments are largely skewed for ceramic tiles due to benefits it brings.

Designer, stronger cement-aggregate based tiles and off-late, stamped concrete as an external flooring are also replacing natural stone or older generation cement based tiles. On the other hand, the current generation of 'glazed vitrified tiles' bring lot of value addition and potential to replace high price, difficult to maintain, costly and imported marbles in India.

In the interiors, hardwood and laminated wooden flooring is getting into some personal space giving it a cozy feel. As today we are more enclosed and better managing the dust, carpet as

niche flooring, is also in vogue; however, mostly carpets have tiles or marble below it! To avoid the hazards of civil work involved in tile or natural marble flooring, high-end, easy to install vinyl and linoleum flooring is the way and people are welcoming that too. In certain usage environment where any joints or porosity in surface is a no-no, epoxy flooring is still popular for the seamless floor.

To summarize, we are in a wonderful country with great opportunities for all sorts of flooring!

### **8) What are your market predictions for the future of floorings?**

I feel that ceramic tile as a flooring, even at current volume, will continue to grow and same applies to other flooring material as well, let it be stamped concrete as a new solution for exterior flooring or even the soft, thick, pleasing carpets in a hotel or house.

We are an environmental conscious generation and that, I feel, will lead to extinction of flooring which either is made using harmful chemicals or emit something which needs to be controlled.

Scientists are working for new useful material and one such subject is **carbon fiber**. I will be happy to see some durable, aesthetically appealing and recyclable flooring material in near future. Till then, let us enjoy the benefits of potential ceramic tiles. Best wishes from Johnson, offering variety of flooring in large sizes up to 4 feet x 8 feet with stain-free and germ-free properties balancing durability, functionality, aesthetics and maintainability!

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