

Group Presentation

Agenda

- Global Tile Industry
- Indian Tile Industry
- About Lavish group
 - Group Structure & Manufacturing Facilities
 - Group Overview
 - Production
 - Exports
- Products
 - Wall Tiles
 - Porcelain Tiles
- Innovation and QC

Global Tile Industry (1/4)

TOP MANUFACTURING COUNTRIES

COUNTRY	2015 (Sq.m Mill.)	2016 (Sq.m Mill.)	2017 (Sq.m Mill.)	2018 (Sq.m Mill.)	2019 (Sq.m Mill.)	% on 2019 world production	% var. 19/18
1. CHINA	5,970	6,495	6,400	5,683	5,187	40.9%	-8.7%
2. INDIA	850	955	1,080	1,145	1,266	10.0%	10.6%
3. BRAZIL	986	871	867	872	909	7.2%	4.2%
4. VIETNAM	440	485	560	602	560	4.4%	-7.0%
5. SPAIN	440	492	530	530	510	4.0%	-3.8%
6. ITALY	395	416	422	416	401	3.2%	-3.6%
7. IRAN	300	340	373	383	398	3.1%	3.9%
8. INDONESIA	370	360	307	383	347	2.7%	-9.4%
9. EGYPT	230	250	300	300	300	2.4%	0.0%
10. TURKEY	320	330	355	335	296	2.3%	-11.6%
TOTAL	10,301	10,994	11,194	10,649	10,174	80.3%	-4.5%
TOTAL WORLD	12,530	13,322	13,627	13,157	12,673	100.0%	-3.7%

Source / Fonte: Mecis / Acimac Research dept. "World production and consumption of ceramic tiles", 8th edition 2020

Global Tile Industry (2/4)

TOP CONSUMPTION COUNTRIES

COUNTRY	2014 (Sq.m Mill.)	2015 (Sq.m Mill.)	2016 (Sq.m Mill.)	2017 (Sq.m Mill.)	2018 (Sq.m Mill.)	% on 2018 world consumption	% var. 18/17
1. CHINA	4,894	4,885	5,475	5,498	4,840	37.8%	-12.0%
2. INDIA	756	763	785	760	750	5.9%	-1.3%
3. BRAZIL	853	816	706	708	702	5.5%	-0.8%
4. VIETNAM	310	400	412	580	542	4.2%	-6.6%
5. INDONESIA	407	357	369	336	450	3.5%	33.9%
6. USA	231	254	274	284	289	2.3%	1.8%
7. EGYPT	190	190	215	252	254	2.0%	0.8%
8. TURKEY	215	234	241	254	239	1.9%	-5.9%
9. MEXICO	197	218	235	242	236	1.8%	-2.5%
10. IRAN	280	190	169	170	230	1.8%	35.3%
TOTAL	8,333	8,307	8,881	9,084	8,532	66.6%	-6.1%
TOTAL WORLD	12,132	12,281	12,989	13,295	12,818	100.0%	-3.6%

Source / Fonte: Acimac Research dept. "World production and consumption of ceramic tiles", 7th edition 2019

Global Tile Industry (3/4)

TOP EXPORTING COUNTRIES

COUNTRY	2016 (Sq.m Mill.)	2017 (Sq.m Mill.)	2018 (Sq.m Mill.)	2019 (Sq.m Mill.)	% on 2019 national production	% on 2019 world exports	% var 19/18	value 2019 (million €)	average export price (€/sq.m)
1. CHINA	1,025	908	854	779	15.0%	27.5%	-8.8%	3,895	5.0
2. SPAIN	395	407	414	415	81.4%	14.6%	0.2%	2,822	6.8
3. INDIA	186	228	274	360	28.4%	12.7%	31.4%	1,138	3.2
4. ITALY	332	338	328	323	80.5%	11.4%	-1.5%	4,509	14.0
5. IRAN	126	148	151	162	40.7%	5.7%	7.3%	188	1.2
6. TURKEY	83	93	101	116	39.2%	4.1%	14.9%	594	5.1
7. BRAZIL	94	90	100	102	11.2%	3.6%	2.0%	308	3.0
8. EGYPT	41	57	68	66	22.0%	2.3%	-2.9%	147	2.2
9. POLAND	46	45	43	50	40.0%	1.8%	16.3%	313	6.3
10. UNITED ARAB EMIRATES	48	46	42	45	54.9%	1.6%	7.1%	n.a.	n.a.
TOTAL	2,376	2,360	2,375	2,418	26.3%	85.2%	1.8%		
TOTAL WORLD	2,820	2,787	2,806	2,837	22.4%	100.0%	1.1%		

Source / Fonte: Mecis / Acimac Research dept. "World production and consumption of ceramic tiles", 8th edition 2020

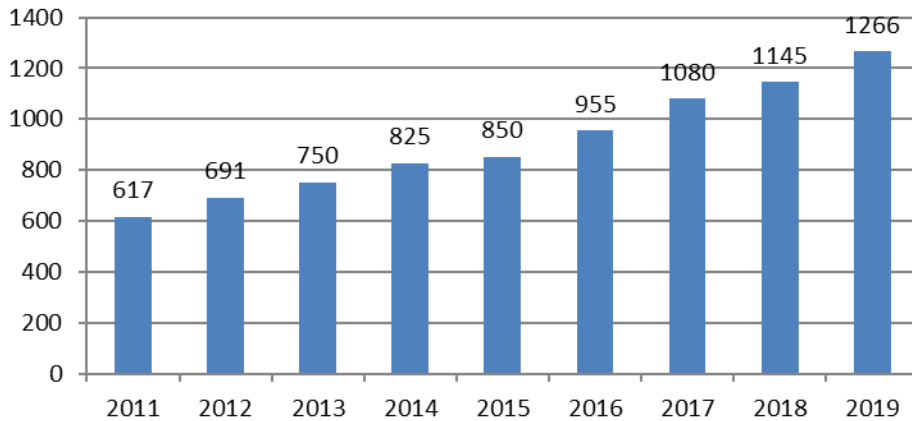
Global Tile Industry (4/4)

TOP IMPORTING COUNTRIES								
COUNTRY	2015 (Sq.m Mill.)	2016 (Sq.m Mill.)	2017 (Sq.m Mill.)	2018 (Sq.m Mill.)	2019 (Sq.m Mill.)	% on 2019 national consumption	% on 2019 world imports	% var. 19/18
1. USA	179	194	202	209	204	74.7%	7.2%	-2.4%
2. IRAQ	106	112	129	124	138	98.6%	4.9%	11.3%
3. SAUDI ARABIA	188	167	131	116	126	66.3%	4.4%	8.6%
4. FRANCE	99	104	112	111	113	89.7%	4.0%	1.8%
5. GERMANY	100	115	109	106	110	90.2%	3.9%	3.8%
6. PHILIPPINES	60	75	82	91	86	67.2%	3.0%	-5.5%
7. INDONESIA	45	57	64	77	72	17.4%	2.5%	-6.5%
8. SOUTH KOREA	72	75	78	77	70	70.0%	2.5%	-9.1%
9. THAILAND	56	54	55	57	61	32.4%	2.2%	7.0%
10. ISRAEL	52	57	58	61	60	93.8%	2.1%	-1.6%
TOTAL	957	1,010	1,020	1,029	1,040	59.6%	36.7%	1.1%
TOTAL WORLD	2,710	2,820	2,787	2,806	2,837	22.9%	100.0%	1.1%

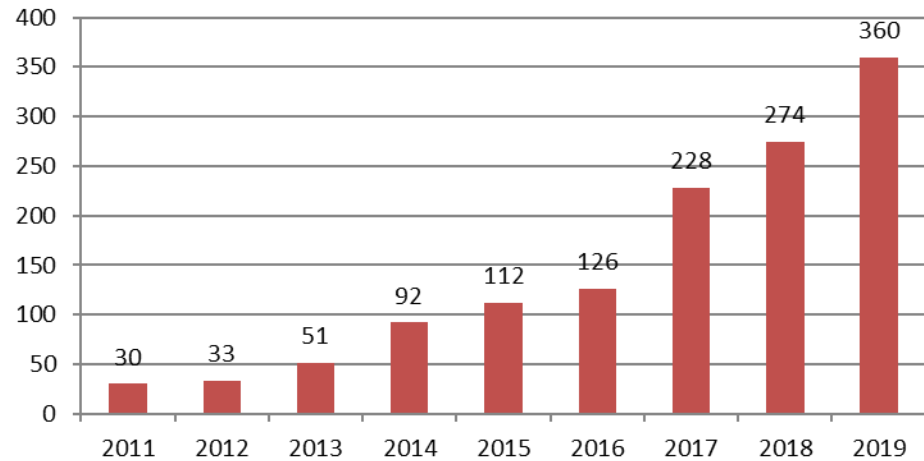
Source / Fonte: Mecs / Acimac Research dept. "World production and consumption of ceramic tiles", 8th edition 2020

Indian Tile Industry

Production in Million Sq. Mtr.



Export in Million Sq. Mtr.



About Lavish Group – Structure & Mfg. Facilities



Lavish Group of companies is one of the largest producer and exporter of tile in India. Accompanied by ISO 9001 certified methods of production, we are the most sought after tiles brand renowned for both excellent quality and leading edge designs.

Wall Tiles	
Plant	Production Capacity (MSM)
Lavish	1.9

Porcelain (Vitrified) Tiles	
Plant	Production Capacity (MSM)
Lavish	7.6
Lakme	5.1
Liva	1.5
Silk	1.5
LuxGres	5.8

MSM = Million Square Meter

About Lavish Group – Production Facility

Below table clearly shows that most of these lines has dedicated size. This has been done intentionally to have consistency in quality and service.

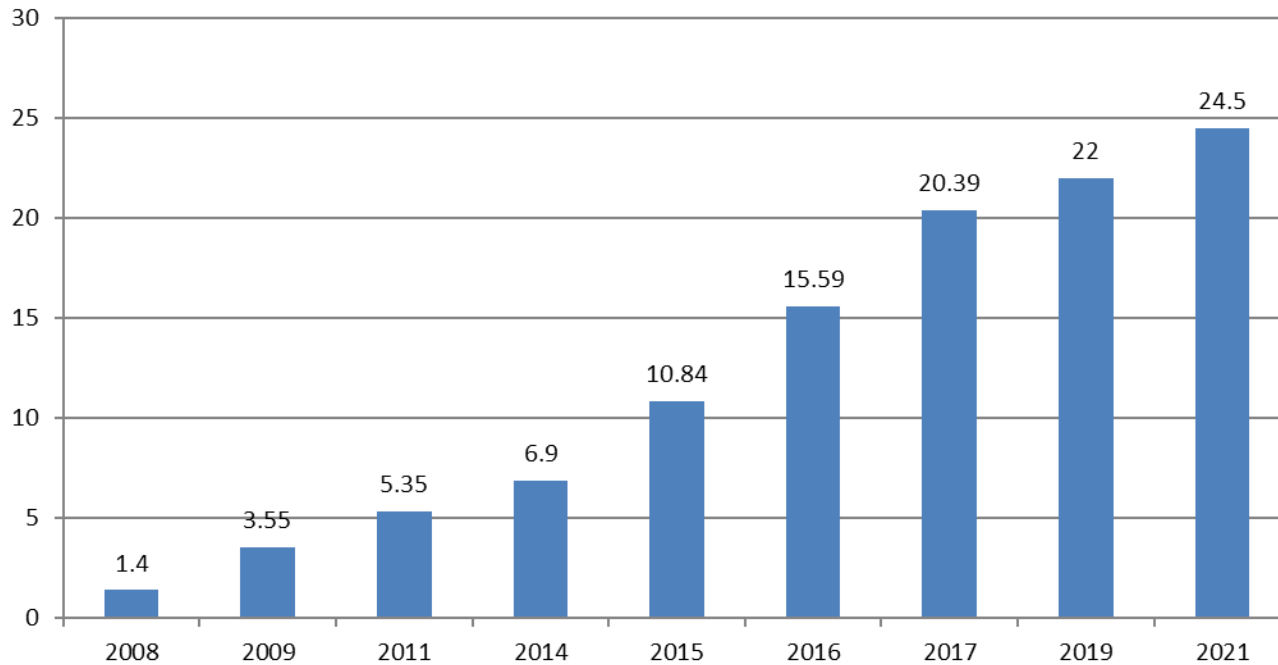
	Type	Size	Polished	High Gloss	Matt R9	Matt R10B	Matt R11	Sugar	Lapato	Glossy	Matt
Line1	Glazed Porcelain Tiles	60x60	Yes	Yes	Yes	Yes	Yes	Yes	Yes		
Line2	Glazed Porcelain Tiles	60x120	Yes	Yes	Yes	Yes	Yes	Yes	Yes		
Line3	Glazed Porcelain Tiles	80x80, 80x160	Yes	Yes	Yes	Yes	Yes	Yes	Yes		
Line4	Glazed Porcelain Tiles	20x120			Yes	Yes	Yes				
Line5	Glazed Porcelain Tiles	30x120	Yes		Yes	Yes	Yes				
Line6	Double Charge Porcelain Tiles	60x60	Yes								
Line7	Ceramic Wall Tiles	30x60								Yes	Yes
Line8	Ceramic Subway Tiles	10x20, 10x30,20x20, 10x40								Yes	Yes
Line9	Ceramic Subway Tiles	7.5x30, 10.8x10.8 ,15x15, 7.5x15, 7.5x20								Yes	Yes

About Lavish Group – Corporate Overview



About Lavish Group – Production

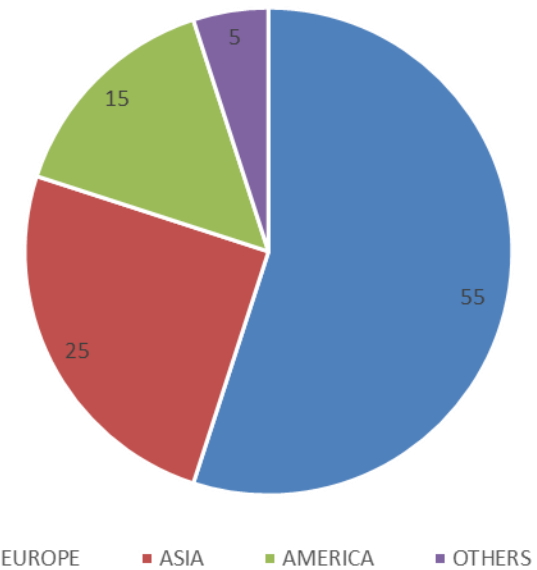
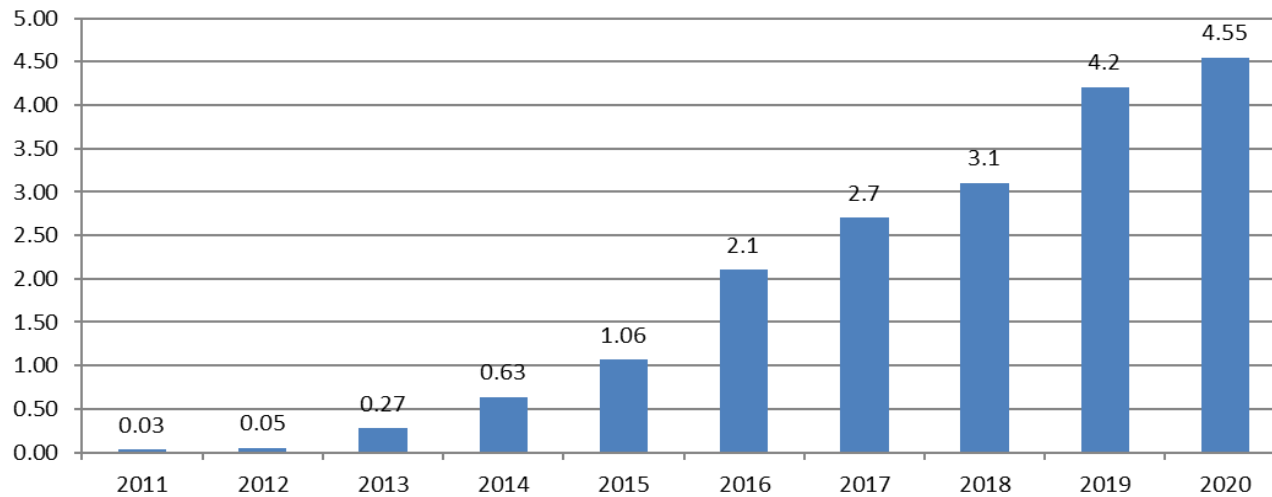
Production Capacity in Million Sq. Mtr.



- Tread of increase in production continues since 2007 and it has crossed 20 million sq. mtr. mark. in 2017

About Lavish Group – Exports (1/1)

Export in Million Sq. Mtr.



- More than 4 million sq. mtr. tiles is exported in 2020 and is expected to cross 5 million in 2021.
- Lavish exports to 50+ countries worldwide
- Major Exports goes to Developed or Developing countries

About Lavish Group – Exports (2/2)



Product – Wall Tiles

Glossy

300 x 600

Matt

300 x 600

Glossy

Subway Tiles

Product – Porcelain Tiles

Soluble Salt Nano

600 x 600

Outdoor (20mm thick)

600 x 600
600 x 900
600 x 1200
200 x 1200
300 x 1200

Double Charge

600 x 600
800 x 800

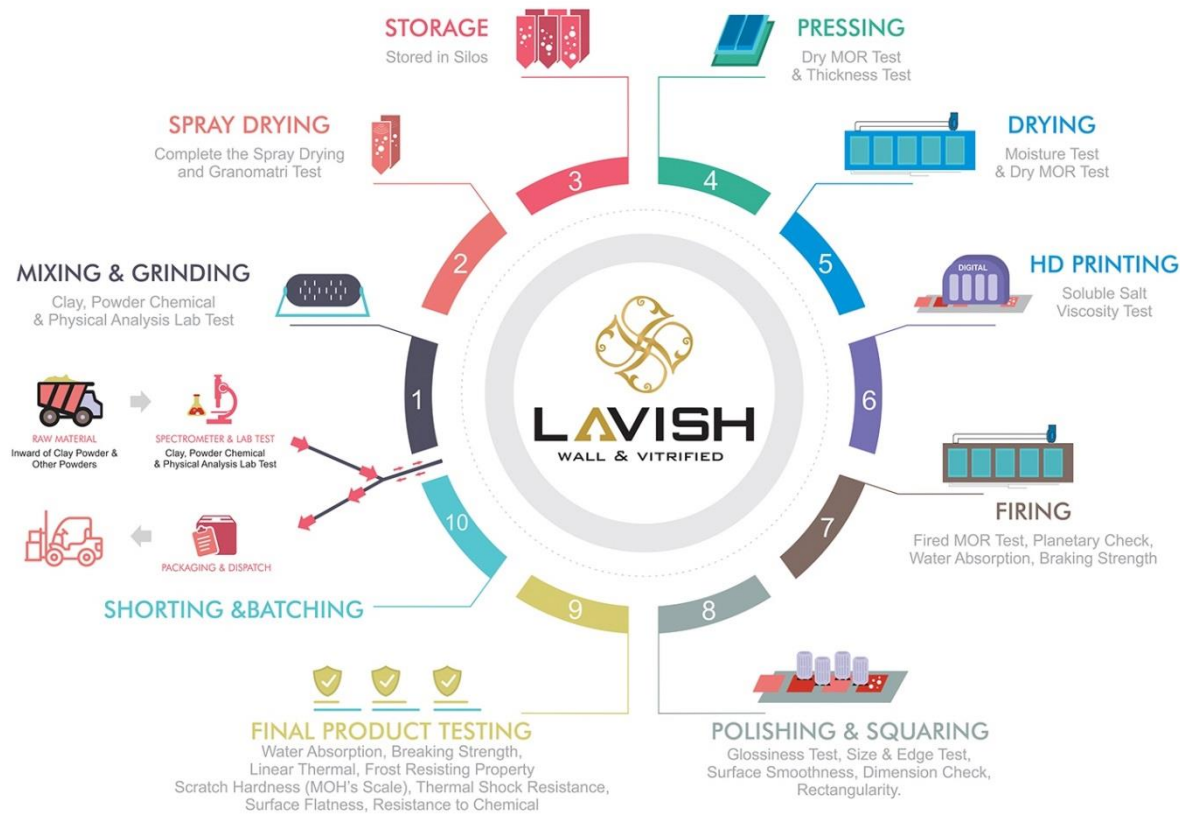
Glazed Porcelain Tiles

300 x 600
600 x 600
600 x 1200
800 x 800
800 x 1600
200 x 1200
300 x 1200

Innovation and QC

Research and Development is a very pertinent practice at Lavish Group and it empowers us to innovate consistently. A robust, controlled, flexible and customizable production process is necessary in order to make innovative ceramic composite materials. For us, innovation is not only about creating a sophisticated product but is also all about adding synergy to the process of procurement, production process, supply chain, marketing, sales, service and eco-friendly production.

Quality analysis is also a very important part of our production process as we believe in adhering to strict production parameters



Some References



Why LAVISH

- LAVISH is premium brand who keeps quality and consistency on top
- LAVISH is biggest exporter from India to Europe
- LAVISH has more European culture in the factory where client gets European product at Indian Rate
- LAVISH is the only Indian company who has French, Spanish, Italian national employees
- LAVISH prefers to do less but clean business
- Some references given in last slide, works with LAVISH since years

Thank you

