

## A STUDY ON GLOBAL MARKETING OF INDIAN SANITARYWARES

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### **Abstract:**

This article refers to the study on Global marketing of Indian sanitaryware, The Sanitaryware is the necessity and low involvement functional product, In India there are many sanitaryware manufacturers operating globally with their strategies and Updated technologies; Global marketing is indispensable when a sanitary ware manufacturer or a distributors wants to expand their business. Indian sanitary wares are globally known and giving tough completion to Chinese Sanitary ware products. Quality , Price , and Brands play a vital role in global marketing. When a sanitaryware manufacturer looking for a global marketing, their attention should be on the preferred models, and to comply the quality standards with affordable prices too. Apart from these the vigorous advertisement is also essential to expand their network; the sanitaryware manufacturers in India are attentive and keenly watching in to global marketing for a favourable opportunity to get in to the market or sustaining their network with their services, When seeing in to sanitaryware, it is imperative for a manufacturer to update with the trend and consider the traditional culture where they want to step in, the product up gradation along with the marketing strategies only lead them to success. Now Each and every business needs a territorial business operation rather it may be overseas, Generally the competition in the market are not monopolistic and it is necessary for a business people to earn profit from various buckets.The main objective of global marketing should be to satisfy the global customers that the manufacturers aim and sourcing new global customers to expand their business.

**Keywords** – Bathwares, Challenges , Overseas competiton , Pricing , Quality standards & services

## 1 Introduction

The world is interconnected through many ways, global marketing is the best move to the country's economy, In this article let's see it in details, how the sanitary ware marketing is operated globally , in India and from India as well, if the product manufacturers think to get in to globally, the vital part is to comply the 4 Ps defined in global marketing , Product , Price , Place and Promotion, when going through the sanitaryware market in india, It is divided as Gujarat sanitaryware (Unorganized sanitaryware brands), Branded sanitaryware from india & Sanitaryware manufacturing in India operated by an overseas venture, Gujarat is a main hub for sanitarywares in India, where many manufacturers are exists in Morbi and Thanghad , They manufacture and export to many countries according the receivers need. Branded Indian Sanitaryware manufacturers like Kajaria, Hindware, Cera& Vermura, are existing in India and they do have their international network and meeting their international standards required for global marketing and International sanitaryware companies from overseas like Toto, Duravit, Kohler, American Standards started their manufacturing unit in India to get the market share from India and to serve other countries with the cheaper resources and raw materials available here.

### 1.1 Global Sanitaryware Market

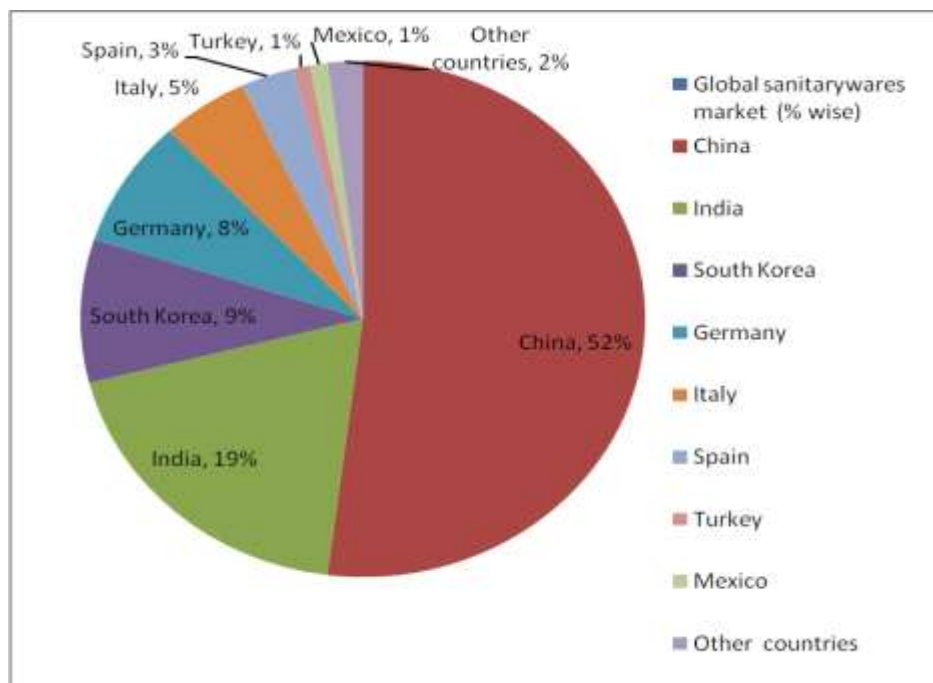
The Global Sanitaryware market's Product Segment as below

- Wash-basins
- Coupled closet
- Vanity basins
- Asian toilets,
- Concealed and modern toilets
- Urinals etc.

The worldwide sanitaryware market size is roughly estimated as USD 50.14b , Indian sanitaryware is considered as world second largest sanitaryware distributor after China, It is serving almost 20 Percent of world's sanitaryware market as per the table shown below

Global sanitarywares market (% wise)	
China	52%
India	19%
South Korea	9%
Germany	8%
Italy	5%
Spain	3%
Turkey	1%
Mexico	1%
Other countries	2%

(Source – Secondary Data)



### 1.3 Objectives of the study

- The objective of this study is to know ,how the Indian sanitaryware is marketed globally.
- And, when operating globally what are all the Challenges faced
- To know the competence level with International sanitary ware brands and its remedies

### 1.4 Significance of the Study

The imperative part is Indian sanitaryware is liked around the world, whether is unorganized sanitaryware manufacturers from Gujarat or it is from a reputed organized sanitaryware manufacture located in this country, Equally competitive when compare to the Chinese sanitaryware manufacturers. The premium segmented markets are the only one area where the Indian sanitaryware brands are lacking to dominate. This study signals the Indian sanitaryware manufacturers to concentrate on the gap ( which is premium segment market & Europe countries)

### 1.5 Scope of the Study

This study narrates the global marketing of sanitaryware, the scope of study is within India, and the Global sanitaryware network of Indian sanitarywares in general.

### 1.6 Data collection

The Date collection is primary and as well as secondary, The method followed was Interview & Observations, while Interviewing 10 respondents ( Aging 25 to 50 ) professionals from sanitaryware sector and very well known about Global sanitaryware market, The Data collection was pertaining to the competition , market share & challenges, As per the data

collected, it is elaborated in this article about the operation of Indian sanitaryware and its challenges.

### 1.7 Methodology

This article refers the descriptive research type and this is based on narrative analysis also (an approach to qualitative research.)

## 2 Indian Sanitaryware Market

The below table refer how the Indian sanitaryware market is categorized

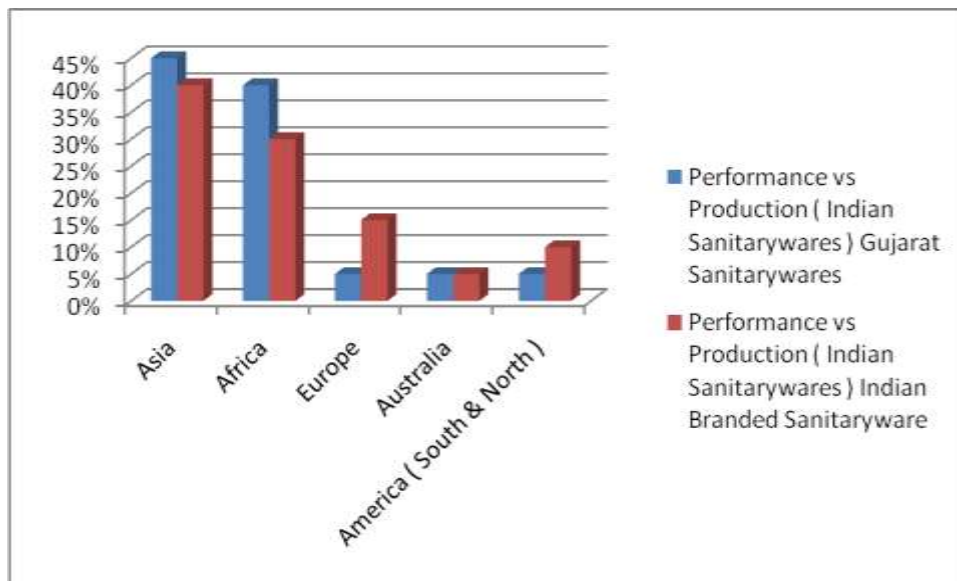
Indian Sanitaryware Market		
Gujarat Sanitarywares ( Unorganised Sanitaryware Brands )	Organised Indian Sanitaryware Brands	International Sanitaryware Brands
Sonet , Somany ,Eros , Pupa ,Priya ceramics , Brilliant ceramics , Bell ceramics, ORB , Nobel etc	Hindware , Cera , Kajaria & Vermura sanitarywares	Kohler , Toto , Roca ,Duravit,Villeroy&Boch, Jaguar, Americal Standards ,RAK etc

(Source – Primary Data )

When analyzing the Indian sanitaryware market and its global presence, it is ample clear Indian sanitaryware has its strength in Asia & Africa and weaker in Europe, America (South & North ) & Australia, Those areas the International sanitaryware brands are well connected. The below table refers the performance proportionate versus the products produced of Indian Sanitarywares ( Gujarat sanitaryware and Indian Branded Sanitarywares), Considering 100 % as production and in those 100% how it is proportionate amongst globally.

Performance vs Production ( Indian Sanitarywares )		
Regions	Gujarat Sanitarywares	Indian Branded Sanitaryware
Asia	45%	40%
Africa	40%	30%
Europe	5%	15%
Australia	5%	5%
America ( South & North )	5%	10%

( Source – Primary Data )



While seeing Gujarat sanitarywares and Indian Branded Sanitaryware their most of the product produced and distributed to Asian countries and African countries where quality is not a concern and the Indian manufacturers can match the pricing too. And their lesser percentage of products only circulated to Europe, Australia and America, where they are weak and face many challenges.

### 2.1 Gujarat Sanitarywares ( Unorganised Sanitaryware Brands )

Gujarat is heart of ceramic and sanitaryware industry in India, That too especially Morbi produces almost 90% of the sanitaryware products in India, renowned as top producers in the world. Many of the companies in Morbi dealing across world and famous for OEM services, offers all ranges of product & quality, according to the price and place. Nowadays Indian sanitaryware is able to compete with Chinese sanitaryware comfortably as because the Indian Sanitaryware is backed by Gujarat sanitaryware industries, Gujarat sanitaryware extended its network almost in every country, and gives tough competition to Chinese sanitaryware and other reputed brands too, Normally the Gujarat sanitaryware does not concentrate on specific brands, as most of the time they manufacture for some other company's brands, satisfies the low, mid segments, usually mid and premium segment is concentrated very less as the demand is less, and that market segment is dominated by Territorial Organised sanitaryware brands in respective countries and International sanitaryware brands, Eventhough Gujarat sanitaryware is Spread over all the countries, some segment can not be exploited, as the segment is controlled and dominated by the Territorial organized sanitaryware manufacturers or International sanitaryware brands. Gujarat sanitaryware industry is expertised in volumes rather than brands, on the other hand many sanitaryware exhibitions, Expos and notable HBLF shows are conducted in Gujarat which generates customers around the world, Sanitaryware distributors from various countries visits Gujarat periodically for the purpose of the business, Middle east Asia and

African markets are very well captured by Gujarat sanitaryware manufacturers , as these markets giving more importance to the price and volumes and less focused on high quality.

## 2.2 Organised Indian Sanitaryware Brands

Amidst few greatest international sanitaryware brands entry in the market, there are Indian based sanitaryware too have their eminent presence in the market like, Kajaria sanitarywares , Cera Sanitarywares ,& Hindustan Sanitarywares , Varmora sanitarywares , ( Parryware sanitaryware & Neycer sanitaryware was not considered , as Parryware was taken over by Roca sanitaryware from Europe& Neycer Sanitaryware stopped their production and started outsourcing from China and Gujarat ) . The above cited Sanitary ware brands are considered as a reputed brand of India, and they operate globally and predominant in low and mid segmented product and competitive in premium segment, Cera Sanitaryware and Hindware ( Hindustan Sanitaryware ) are leading sanitaryware brands and giving immense competition to international brands like Kohler and Jaguar in the premium segments, There are International sanitaryware manufacturers like Kohler, TOTO, Jaguar , Duravit & RAK Ceramics started their factory here to capture the local market and nearby countries too , it is believed that the overseas sanitary wares have a good market in the premium segment in India and worldwide too. Indian branded sanitaryware too operating successfully worldwide, Indian brands has good reputation in Middle east and Africa and to some extent in Europe also. The price and products vary depending on the market and culture.

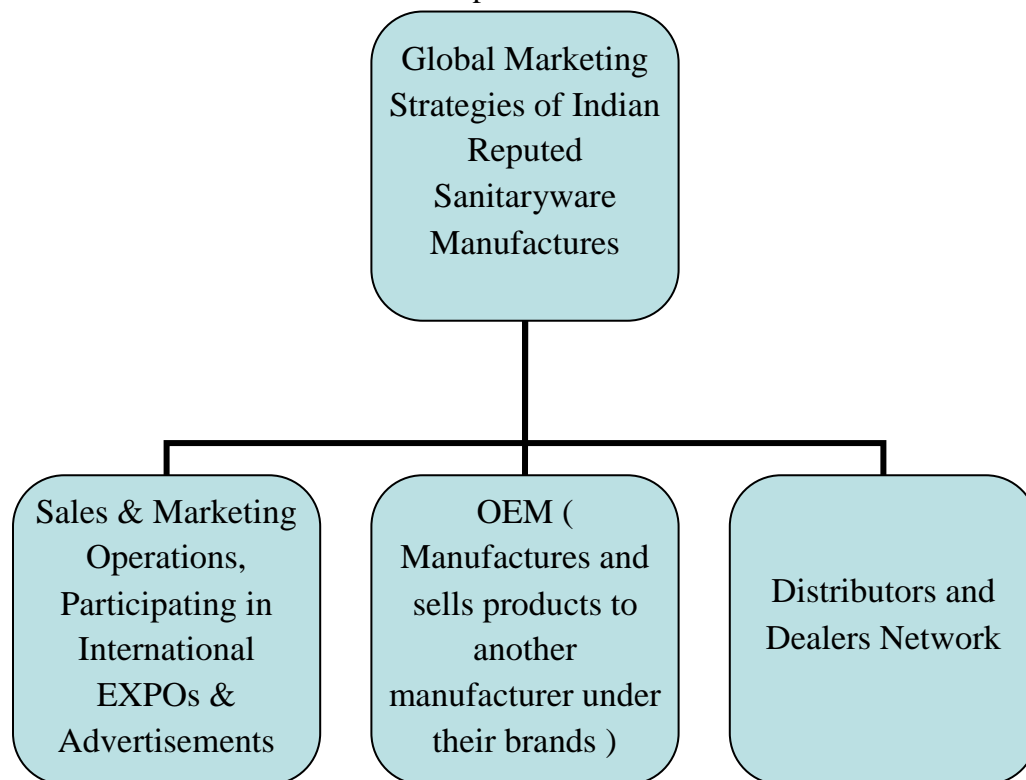
## 2.3 International Sanitaryware Brands

International sanitaryware Brands used to operate in India through dealers, and they found India is a good platform to do business and set up a factory as the rawmaterials , labour cost and various costs are cheaper than setting up a factory in Europe or America, Thus International sanitaryware brands came in to existence, some international manufacturers/brands bought the running sanitaryware companies like Roca sanitaryware from Spain took over Parryware of India, recent years leading companies like Kohler , Duravit, & Rak etc started their manufacturing units in India, it became a dual advantage for them as India is a big market, it can cover the Indian premium segment and they can export the products to the nearby countries from here. The existence of International sanitaryware brands are creating a tough competition to local sanitaryware manufacturers.

## 3 Global marketing Strategies adopted by Indian sanitaryware brands ( Organised & Unorganised Sanitaryware brands )

The reputed Indian sanitaryware companies like Cera , Hindware & Kajaria are normally using the above mentioned platform for global marketing, Those companies appoints sales managers who visits the customers around the world to get the business and often participates in the expos and bathware exhibitions world wide to show globally about their presence. And there are certain areas which the Indian sanitaryware brands can not enter in their name, where OEM works will be a good option to get business, especially in Europe . Indian Sanitaryware manufacturers are keen to participate in exhibition conducted in other countries ( Like BIG 5 in UAE & Canton Fair in China ) hence they would grab the opportunity to expand their business , appointment of

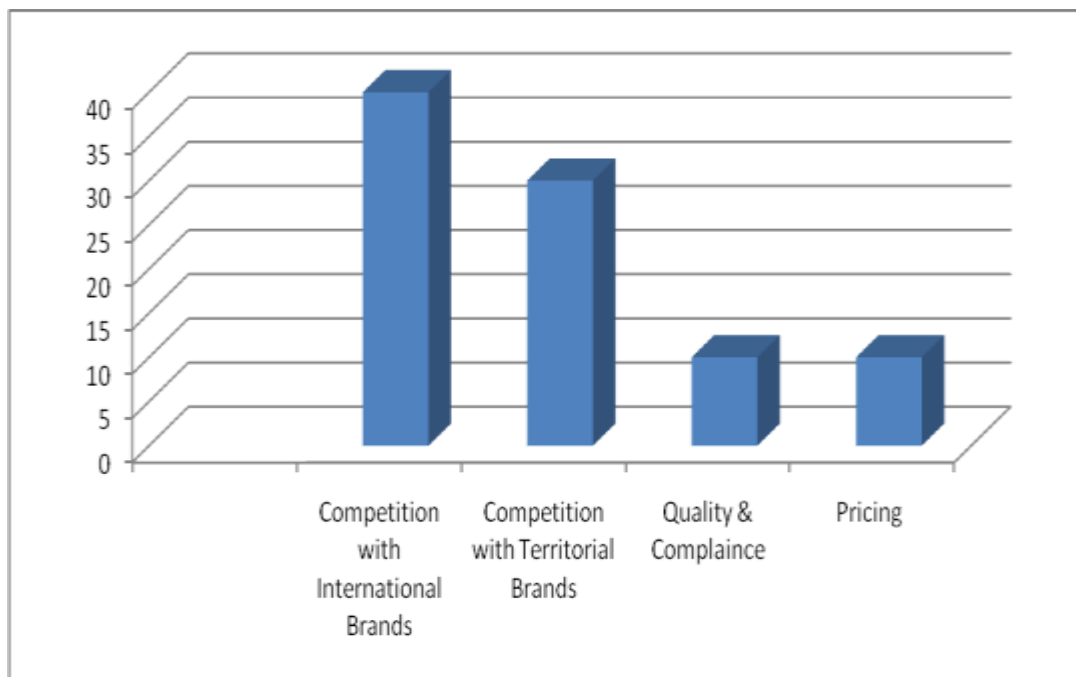
dealers and distributors is also one of the good ideas followed by Indian sanitaryware manufacturers , the reason is every time they can not get connected with the market, keeping a dealer/distributor would ease their operations.



#### 4 Challenges Faced Indian sanitaryware manufacturers in Global Marketing.

The premium segment and the Western countries are main concern of Indian sanitaryware , as because luxury/premium customers go with brand heritage, prestige and the special identity, it is not just buying sanitaryware. as per them it is an investment in lifestyle. Likewise in western countries, most of the customers prefer to buy world's leading sanitaryware brands like, Kohler, Ideal Standard , Jaguar ,Laufen& Roca etc, These brands are much stronger in premium segment and moderate enough in mid segment and they less focus on low segment.

When a Indian sanitaryware manufacturer ( Gujarat sanitaryware manufacturer or Reputed brand sanitaryware manufacturer ) operates globally , the cost factors and competitiveness are most important, many countries they need to sell with the low margin because of competition raised by Chinese sanitarywares , middle east and African markets are considered to be mid-segment market, where price is most important than quality, these areas the The Indian sanitaryware has a good market when compared to the markets like Europe,United states and Australia where quality plays a vital role. And it is necessary to comply the standards specified by importing countries like SASO certification for Saudi Arabia , KIWA certification for Bahrain ,ISO certification for many countries.



The Indian Sanitaryware manufacturers face a healthy competition from the respective country's local sanitaryware manufacturers like in UAE Rak ceramics & General Ceramics are local brands, in Kuwait Aquasan is a local brand, Saudi Arabia – Saudi ceramics and al forsan are local brands, in Srilanka – rocell ceramics is a local brand, hence competition raised by many sanitaryware operators, International sanitaryware brands too gives immense competition as the presence of international brands are everywhere. Surviving in any market is not quite easier, only possible through products, pricing and effective services.

- Big Challenge for marketing an Indian Sanitaryware brand is the competition given an international Reputed sanitaryware brand
- Territorial sanitary brands too exist in each and every countries, that too a challenge, Because many countries prefer and insists to buy their national products
- Quality and compliance is not a major issue for Indian Sanitaryware players, as the products are good in quality, less usually they get non-confirmatory for quality and standards parameter
- Pricing can be matched to all the global markets as the resource and labour costs are less in India, This too a favourable scenario, and less usually it becomes a challenge to Indian sanitarywares

## 5 Conclusion

As sanitaryware manufacturers are filled world wide, the competitions are inevitable, as far as global marketing of Indian sanitaryware is concerned, it is observed as doing good in Asia and African markets, and weaker in Europe and American Markets, to overcome such issues, the



marketing part needs to be tuned well to have good branding, advertisements and render good quality products with services, the focus towards the weak market to be addressed with efficient marketing tools and strategy, hence the Indian sanitaryware manufacturers can foresee the betterment in their business.

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