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Preferred international journal of AIGMF in association with Kanch

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FOCUS ON INDIA > PERSONALITY PROFILE

Indian visionary gains global recognition

John Wallis was among the invited guests at this year's Phoenix Award banquet in Berlin to celebrate the achievements of the 2013 Glass Person of the Year, Chandra Kumar Somany. They spoke prior to the event about C K's pride at receiving this recognition on behalf of the HNG family.

Having recently celebrated his 80th birthday, C K Somany could be forgiven for slowing down the pace of his busy lifestyle. His sons Sanjay and Mukul, together with grandson, Bharat, now head an experienced management team at India's leading glass container producer, a successful float glass business and a revitalised glass container operation in Germany. After six decades at the helm of Hindustan National Glass & Industries Ltd, however, C K still maintains a close involvement with one of the international glass industry's most enduring family dynasties. Now, his achievements have been recognised by the Phoenix Award Committee, confirming this visionary entrepreneur as the 43rd 'Glass Person of the Year' and staging a celebratory banquet in Berlin in his honour, surrounded by close family and friends.

The award is richly deserved

recognition for C K's efforts in the creation and constant development of HNG over a period of more than 60 years. Having started with a semi-automatic glass container production facility, HNG was India's first to convert to fully automatic operation in 1952.

Now a spritely 80 years of age, C K still maintains an active interest in the company's affairs as non-executive Chairman. It is through his vision, a constant drive towards innovation and the adoption of the latest technologies that the HNG Group has emerged as a market leader in the Indian glass packaging industry. The group now operates seven fully automated container plants in India and one in Germany (HNG Gkbal at Gardeliegen), producing more than 4800 tonnes/day of glass.

Separately, the group also has a 700 tonnes/day float glass unit, which is soon to more than double

in size via the addition of a second (1000 tonnes/day) furnace and production line. Leading Turkish float glass producer, Trakya Cam Sanayii AS has recently created a joint venture with HNGFL and the Somany family, bringing valuable expertise in the development of value-added, high performance processed materials for automotive and architectural use. Mr Somany confirms that Sisecam Group subsidiary Trakya Cam will be responsible for running a proposed specialist processing facility alongside the float plant. Both parties have a 50% shareholding in the venture, which is expected to exploit significant expansion opportunities in the local Indian market.

"It is very different to HNG's glass container business in terms of products, manufacturing methods and customer requirements but I think we have managed it very well" says the HNG non-executive Chairman.

Collectively, the extended HNG family has now grown to include approximately 14,000 people in India and Germany.

VISIONS NEARING REALITY

"Being the first Indian to receive the Phoenix Award makes me extremely proud on behalf of my nation, as well as everyone within the extended HNG family" says C K Somany. "It has been a collective effort that has resulted in this recognition, involving many colleagues



C K Somany (left) receives the 43rd Annual Phoenix Award from Gordon L. Jungquist, 2013 Phoenix Award Committee Chairperson.



C K Somany has worked in the primary glassmaking industry for over 60 years.

Regional focuses

Market reports



FOCUS ON INDIA

Indian flat glass revival on the cards

Via exclusive interactions with a number of leading producers such as Asahi India Glass and Gold Plus Glass, Sunder Singh tracks the development of the Indian flat glass industry.

The second most populated country on the planet, India is often considered a nation of contrasts by many outsiders. In its context, the same is true of the country's flat glass industry. Despite a number of investments in the infrastructure sector and a revival in the construction industry, India has not seen a single flat glass plant in the past two years. (Sunder Singh's third visit to India in March 2014 was the last address). In fact, the reverse has happened, with the closure of a flat furnace by Asahi Glass.

MARKET OVERVIEW
Served by eight flat glass lines from five producers, the \$360 turnkey heavy flat glass market is one of the most under-serviced. In fact, during the last two years, most producers have been earning at one capacity utilisation rates, resulting in an output level of no less than 5000 tonnes/day.

Even taking the theoretical \$360 turnkey capacity into consideration, the annual output of flat glass is about one million tonnes for a population of 1.20 billion, resulting in a meagre 1.52kg/year per capita consumption, making it one of

the lowest per capita users of flat glass across the globe. In comparison to India, most Asian countries have a significantly higher per capita flat glass usage. However, from another context this could be seen as a major opportunity for investment, the availability of a service sector and rising living standards of a vast sector of the population will inevitably lead to higher per capita consumption and strong growth for the country's flat glass industry.

GROWTH PAINS
The local flat glass industry has been going through a lean patch for the last three years. A change of government in New Delhi in mid-2014 brought good news for glass industry stakeholders. However, the country's construction sector is yet to see a healthy turnaround, leading to depressed demand for flat glass.

However, 2015 has brought better news for the industry, the announcement of 100 smart cities and robust economic demand is bringing life back in stalled construction projects across the country. The flat glass industry is expected to register double digit

growth, according to most flat glass producers. The country's automotive industry too has started to register healthy growth rates for the last three quarters, which should boost sales for the flats.

DUMPING ACCUSATIONS
Indian flat glass producer cite dumping as a significant hindrance in the development of the domestic flat glass industry. A few years ago, it was reports from China that forced more than 10% of total flat glass consumption in the country. More recently, however, the importation of flat glass from the United Arab has been increasing at a brisk rate. Although the Indian government has imposed antidumping and safeguard duties, reports from these countries still ring alarm.

In a move in late 2013, three prominent glass producers (Asahi India Glass, Gold Plus Glass, Industry Ltd and HNS) filed a collective application to the Indian authorities seeking dumping of flat glass from Iran, taking cognisance of the application, India



Stadium glass features provide the level of demand required by the local government of India's construction.



FOCUS ON INDIAN SUB-CONTINENT > India

Indian glass industry set for 'brisk action'

Although India's flat and container glass sectors have not been the subject of major capacity expansion or the entry of new players in recent times, both are gearing up for brisk action. With the GLASSPEX India exhibition returning to Mumbai on 13-15 March 2015, Sunder Singh evaluates the leading players in both sectors.

Four months is not a long time for the revival of a country's industry but in its first few months in office, the national government in New Delhi has made remarkable progress with respect to India's moribund economy and struggling industries. Economic indicators, which were falling quarter after quarter over the last three years, have started to improve.

Signaling a turnaround for the economy and adding to the current festive cheer, the first quarter (April-June) GDP growth came in at a higher than expected 5.7%. This latest growth performance is the highest for the last nine quarters. The Q1 GDP growth has been buoyed by a sharp turnaround in manufacturing, coupled with a strong showing by the local mining and construction sectors. Industries that were running at very low capacity utilisation rates are redrawing their plans against the prospect of healthy anticipated demand.

GLASS CONTAINER TRENDS
Dominated by Hindustan National Glass, Piramal Glass and AGI Glasspac, the Indian glass container industry involves a dozen mid-scale producers besides these three. HNS is in the process of stabilising

its capacity following massive additions at its existing Nasik unit and commissioning of the greenfield project at Naidupet, Andhra Pradesh. Of the other players, Piramal and Janta Glass have added capacity and modernised their production facilities. Two small glass container units belonging to liquor manufacturers Mohan Meakins and Khoday Glass faced closure due to their operations becoming uncompetitive.

The Indian glass container industry has been facing the consequences of a double-edged sword; on one side, lower growth in end user segment and oversupply in the glass market and on the other, rising prices for raw materials and fuel. Major end user liquor and beer growth had contracted from double to single digit in the last two years. Following the change in government office in New Delhi and resulting economic rebound, however, producers are gearing up for brisk business in coming year.

The country's production and supply of container glass increased steadily in line with demand until 2012 (10800 tonnes/day), with capacity additions by all key players pre-2012 years, combined with sluggish demand, leading to >



Glass Worldwide is exclusive preferred international journal of AIGMF and a media partner of GLASSPEX India.

low capacity utilisation. With steady demand growth anticipated in the coming years and no major extra capacity additions expected, existing capacity utilisation is expected to remain at healthy levels.

Company	Location	Capacity (tonnes/day)
HNS	Pan India	800
AGI Glasspac	Andhra Pradesh	300
Piramal Glass	Gujarat	600
Haldip Glass	Gujarat	320
Mohan Meakins	Uttar Pradesh	240
Sarvot Glass	Gujarat	220
Janta Glass	Gujarat	220
Indra Glass	Uttar Pradesh	210
Haldip Glass	Madhya Pradesh	150
Wham Glass	Madhya Pradesh	130
Pragati Glass Industry	Gujarat	130
Flat Glass Industry	Gujarat	130
Specialty Glass (float-based units)	Uttar Pradesh	500
Combined capacity of all remaining small producers	Pan India	700
TOTAL		3800



Bucher Emhart Glass is a supplier to Universal and an exhibitor at GLASSPEX India.



Being part here at GLASSPEX India, Bottero supplies equipment to Piramal Glass.



Regional focuses

► Interviews with figureheads



FOCUS ON INDIA - PERSONALITY PROFILE

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VISIONS HEARING REALITY

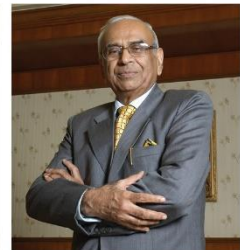
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C K Somany (left) receives the 43rd annual Phoenix Award from Gordon V. Jungblut, 2013 Phoenix Award Committee Chairman.



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Representing the interests of India's glassmakers

Sanjay Ganjoo, Chief Operating Officer at Asahi India Glass Ltd took over as President of the All India Glass Manufacturers' Federation in 2014. Every major local producer of flat and hollow glass is now an AIGMF member, with the organisation successfully representing the interests of the industry and its products.



Sanjay Ganjoo is Chief Operating Officer at Asahi India Glass Ltd and President of the All India Glass Manufacturers' Federation.

Sanjay Ganjoo has spent his entire working life at Asahi India Glass Ltd, the largest integrated flat glass company in India, which produces some 1200 tonnes/day and consumes about 18,000 tonnes of glass/month. Having originally joined the company's automotive glass operation near New Delhi as an engineer in 1960, a series of promotions through the management structure led ultimately to Mr Ganjoo's appointment as Chief Operating Officer six years ago.

Mr Ganjoo was elected President of the All India Glass Manufacturers' Federation in September 2014 and is currently just over halfway through a two year term of office. It had been a key goal of the AIGMF and Mr Ganjoo personally to involve India's flat glass community within the previously largely hollow glass-focused organisation. Today, this goal has been realised, with a specialist Architectural Glass Panel having been created and every major flat glass manufacturer now a member. As a result, it has been possible to bring more flat glass issues to the AIGMF agenda, where they can now be taken up by the glass industry as a whole, instead of on a company-by-company basis.

"We are pushing forward with building regulations for India, codes that have to be properly defined" Sanjay Ganjoo explains. "So we are trying to bring in these rules and promote architectural glass by increasing awareness and knowledge among users." To support these efforts, the AIGMF organised a conference entitled 'Use of glass in buildings - Facades of the future and



Mr Ganjoo was elected President of the All India Glass Manufacturers' Federation in September 2014.

the need for regulations relating to human impact, fire safety and energy" during GLASSPEX India 2015 exhibition in Mumbai last March. "India's architectural specifiers still have very limited knowledge about the use of glass as a facade... there are many concerns but we are seeking to bring clarity."

According to Mr Ganjoo, the Architectural Glass Panel is currently promoting flat glass for use as a partition walling material in competition with plywood, brick and plastic, as well as for firewall duties. "Glass can be a good replacement for these materials because it is 100% recyclable and has a lot of value in terms of saving resources.">



Temporarily operating at Asahi India Glass Ltd.



Together with Sanjay Ganjoo and the Executive Committee, Vinit Kappu (right) is taking the AIGMF's profile with government departments, regulatory authorities etc. as the recognised voice for the Indian glass industry.



Technology topics

► Latest technical advances



FOCUS ON INDIA

Vial forming innovations from Indian specialist

Having improved production capacity with additional manpower, a different building and the introduction of advanced tooling machines, OCMI India is working to optimise its glass processing equipment, starting with the 16 station TAM vial forming machine, which represents the Ahmedabad factory's main product. Alessandro Crescentini reports.

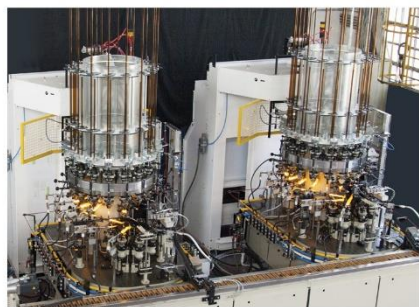
Originally manufactured by OCMI India, the 16 station TAM16 vial forming machine was created to satisfy the expectations of local vial manufacturers looking for a simple index rotation machine, with good productivity and a reasonable price. Increasing local quality standards stimulated the company to study the latest developments and improvements to be applied to its machine in close co-operation with the Engineering Department at OCMI's Italian headquarters.

With a maximum mechanical speed of 1700 pieces/h, the recently announced TAM114 indexing rotation machine provides the same vial quality of European-made continuous rotating forming machines like FLA20 and FLA35 models, manufactured at OCMI's Italian facility. Several of the innovations applied to this machine are visible in the main mechanical, electronic and pneumatic components. In the devices aimed at improving glass tubing operations and to obtain the best final product in the context of hydrolytic resistance.

The control of machine functions is performed via a user-friendly touch screen, developed with the same graphics concept of other OCMI machines produced in Italy and France. The TAM114 development complies the OCMI Group's equipment portfolio by covering the needs of factories more oriented to index rotation machines.

CAMERA INSPECTION

On demand, the forming machine can be equipped with the OPTIVAL camera inspection system for dimensional control. OPTIVAL software can be implemented in the touch screen to attain a fully integrated control system from the cabinet. This camera system was developed with the same concept



TAM14 vial forming machines in operation.

of the device already available for continuous rotation vial machines and allows users to check production in real-time, to detect any type of centering problem in the chucks and to verify accurate machine settings.

For the most advanced installations, the TAM114 machine can be adapted for connection to the ROBOGLASS automatic loader, in order to minimise manual handling of the glass tube.

ADVANCED LUBRICATION

The oil pump design adopted for forming tool lubrication and all pneumatic components are sourced from leading European suppliers and the latest plunger lubrication system allows users to spray oil from inside the tool and consequently, to keep the machine in a clean working condition, without the risk of glass contamination. A special piping and cabling

design was realised, with special attention given to safety conditions. In addition, the completely renovated chucks are manufactured according to OCMI vial and ampoules continuous rotating machines, in order to make the centering operation easier and more accurate.

Mechanical improvements have been applied to critical operations like glass tube bursting and cutting, where 'smokes' must be removed as much as possible from the glass surface.

OCMI and OCMI India can also provide post-forming lines, specially conceived to receive the output of two TAM114 forming machines. The first complete line was recently installed at one of India's biggest glass factories, located in Maharashtra. ■

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FOCUS ON INDIA > SUPPLIER FOCUS

German quality precision parts from India

An established supplier to GPS and Verallia factories worldwide, Accuramech has recently made its extensive range of precision IS machine parts available on a global scale. Viral Modi, Managing Director, spoke exclusively to Glass Worldwide.

Located in the Indian engineering hub of Pune, Accuramech's roots date back to 1997 when a French entrepreneur founded a company called HBD, with the sole purpose of supplying IS machine parts to GPS America, a Saint-Gobain company. In 2009, HBD was acquired by Saint-Gobain and remained Accuramech. This transformation of the parent organisation into a multinational firm provided the capability to leverage the technical knowhow of Verallia. As a result of Saint-Gobain's involvement, Accuramech extended its customer base to include European plants as well as North American facilities and GPS Glasproduktions-SERVICE in Esson, Germany. Accuramech's relationship with GPS has seen business double between the two companies over the past two years.



Sant Nohle (Accuramech), Anir Kumar (GPS), Rohan Lalvani (Accurmech), Parth Mankar (Accuramech) and Stephanie Berthel (Accurmech) at GLASSPEX India exhibition.



Klaus Rudolph (GPS Chairman), Stephanie Berthel (Project Manager, Accuramech) and Viral Modi (Accuramech Managing Director) at this year's GLASSPEX India exhibition in Mumbai.

EXPANSION FOCUS

Accuramech is headed by Viral Modi, who previously worked at three different Verallia plants in North America. His initial priorities were to ensure that the company had a wide range of parts to offer, not just to Verallia but also to other glass companies. The focus now is to expand.

The core values of Accuramech are 'Highest quality, customised service through new development and competitive pricing'. As a result of substantial investments in R&D and a 50% increase in staffing levels in 2012, the company is now in a position to make a strategic decision to broaden its scope and make its parts available to other glass and IS machine manufacturers. "We were waiting to fulfil our existing customer needs and have a wide range of parts in our catalogue to offer to external customers" explains Mr Modi.

Continuing the successful cooperation between Accuramech and GPS remains a key priority. "In fact, we are thinking of doing bigger things together. Not just parts but more assemblies, bigger and heavier parts"

says Accuramech's Managing Director. GPS has also provided positive feedback to the co-operation. "They are supplying from India but it is German quality – that is the key message" states Markus Krull, head of sales at GPS. Sandy Howells, Marketing Manager, also confirms that no compromises would ever be made on quality. "For all incoming parts, we put them to the same standard quality test. All vendors have to meet the quality criteria whether they are from Europe or India. Accuramech meets our requirements and together, we achieve what GPS is renowned for – best quality" >



Quality inspection of parts at Accuramech's Pune facility.



Global events coverage

Conferences and exhibitions

Potential visitors look to Glass Worldwide for the latest news on conferences, as we preview and review more events than any other international magazine.



FOCUS ON INDIA

5th glasspex INDIA and 1st glasspro INDIA 2017

glasspex and glasspro take place at India Expo Mart, Greater Noida next February. Companies involved in glass equipment manufacture, the glass industry and the glazing trade can now register for both trade shows.

The fifth glasspex INDIA will be staged from 23 to 25 February 2017 at India Expo Mart, Greater Noida, close to New Delhi. Conceptualised on the lines of its flagship show, glasspex Düsseldorf, glasspex INDIA will showcase the entire array of glass, ranging from production to processing and application, offering trade visitors technological innovations, progressive processing techniques and the latest trends in glass applications.

glasspex INDIA has become established as a platform for the exchange of ideas, making contacts and business deals in the Indian market. Exhibitors from 13 countries (India, Germany, France, the UK, Italy, Singapore, China, Taiwan, Czech

Republic, Austria, Iran, Finland and the USA) participated in 2015 and expressed their satisfaction with the quality of the 3222 visitors.

Exhibitors in 2015 included Accuramech Industrial, AIGMF, AMBEG Dr J Dichter, BOF Sottero, Carmet, Carazon, CNLD, Dornbusch, Dukhram Maurya, Electroglass, EME, Emmelt, Eniaz, Eurotherm by Schneider Electric, Fickert & Winterling, FIC, Fliva, Flammatic, Fosbel, Forma, futronic, Gardner Denver, GIMAV, Glass Service (Czech Republic), Glass Service (Italy), GPS, Graphoidal, Heat Applications, Hindustan National Glass & Industries, Hindustan Patrum, HORN, Indotherm, IproTec, IRIS, IWG, JSJ Jodet, Laht, Lubitech, LWN, Mascot, Mappi, MSK, P-D Refractories,



Dignitaries at the official opening of glasspex INDIA 2015. Glass Worldwide is a media partner for the 2017 event.

OCM, Olivetto, Pennekamp, Pennine, Pneumofore, Poco, PSR, Quantum, Rafibar, Ramsay, Raytek, Rondot, Saint-Gobain SEPRRO, Sharnvik, Sheppee, Siemens, SORG, Special Ceramics, SSG, SVA, TECO Group, Terna, VIDMA, Wabtec, Z & J Technologies, Zecchetti and ZIPPE.

The complementary event, glasspro INDIA - international exhibition for flat glass processing and products - will open its doors at the same time in Delhi, showcasing the latest trends and innovations in flat and processed glass products and applications. Also on display will be the latest glass processing solutions, tools, auxiliary products and services.

"The motivation behind the launch of sister event glasspro INDIA is the endeavour to provide a platform dedicated to strengthen the flat glass sector" explained Birgit Horn, Director of glasstec at Messe Düsseldorf.

"Flat glass and its applications are majorly used in the construction sector, which represents the dominant end user market. The Build Fair Alliance, with its concept of providing integrated building solutions, is the perfect complement for the exhibitor and visitor profiles of glasspro INDIA."

Build Fair Alliance is an alliance between global exhibition organisers Messe Düsseldorf India, Nürnberg Messe India, Messe Frankfurt, FSAI and ISHRAE to co-locate their events under one roof to provide one-stop integrated building solutions to stakeholders of the Indian construction industry. Events that are part of the Build Fair Alliance are: ACCEX-India 2017 covering HVAC, refrigeration and building automation systems; FENSTERBAU FRONTALE INDIA 2017, focusing on facade and fenestration products; FSIE 2017, highlighting fire safety and security solutions; ISH 2017, showcasing plumbing systems; and glasspro INDIA 2017, encompassing solutions and innovations for the flat glass industry. ■

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WHAT GLASS CAN DO FOR YOU

AIGMF will organise its 12th international conference with the theme "What glass can do for you" alongside the fifth glasspex INDIA and first glasspro INDIA exhibitions. This bi-annual two day conference on 23-24 February 2017 will cover topics on various glass industry sectors, namely flat, solar, processed, container and tableware, featuring Indian and international speakers from the glass industry and related organisations.

A detailed conference programme will be included within the January/February 2017 issue of Glass Worldwide, the media partner for the conference and preferred international journal of the AIGMF in association with Kanch.

When available, more information about the conference and speakers can be found at www.aigmf.com.

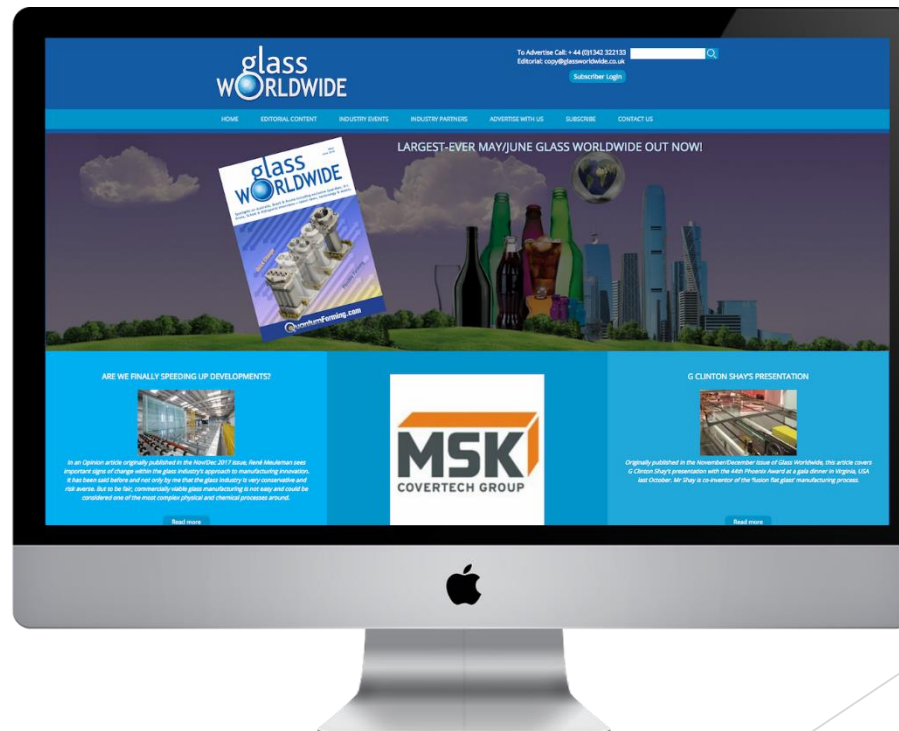


Former AIGMF President's Sanjay Sonnary (far left) and Sanjay Gargan at the 2014 conference opening ceremony, alongside AIGMF President (middle) and Vice Secretary (far right).



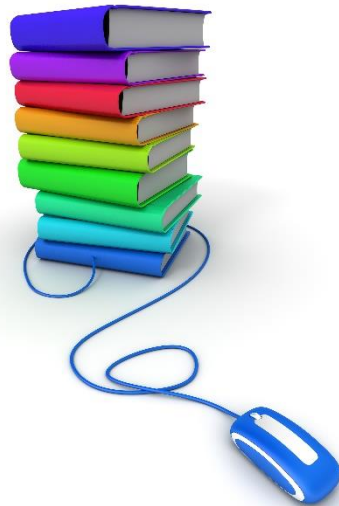
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- ▶ In addition to the paper copies mailed globally, a digital version of each issue is circulated and key content is available to download free of charge at www.glassworldwide.co.uk



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In the new archive library at www.aigmf.com, visitors can download invaluable information featured in a selection of previous Indian articles published in Glass Worldwide and Kanch. Future copies of Glass Worldwide can be ordered at www.glassworldwide.co.uk and Kanch can be subscribed to at www.aigmf.com/kanch.php

In addition to being the leading bi-monthly journal for all sectors and regions of the global glass industry, Glass Worldwide's cooperation with the AIGMF and Kanch provides the Indian sub-continent with the best possible forum for the exchange of news and views between glass manufacturers and their suppliers. Glass Worldwide shares the AIGMF's goals of promoting the Indian glass sector to a domestic and global audience, as well as informing Indian glass professionals of all developments from other regions.

As well as cooperating with the AIGMF, Glass Worldwide's position at the centre of the international glass community is reinforced by also acting as exclusive preferred journal of AFGM, FEVE, Glass Alliance Europe, Glass for Europe, Assovetro, GPI, IPGR, GMIC, www.glassglobal.com, ESMA and the Union of Architects of Russia, official journal of ATIV, GlassPrint, GPC, and UGSC, a partner journal of Friends of Glass, BV Glas the DGG and an active member of British Glass and the SGIA.

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Complete coverage

- ▶ On average per issue, Glass Worldwide publishes 80 editorial pages and 70 pages of advertising.
- ▶ 78% of readers confirmed that they use advertising and editorial content from Glass Worldwide to influence their selection of products and services.



Opportunities for brand exposure



Emphasising the successful AIGMF/Glass Worldwide partnership, a selection of comments from AIGMF dignitaries include:



“Glass Worldwide is the *only* magazine outside India that I read cover to cover. Outside India, it is easily the industry’s best magazine in my opinion.” **Sanjay Somany Vice Chairman & Managing Director of Hindusthan National Glass & Industries (HNG)**



“We subscribe to several copies of Glass Worldwide because it’s the global industry’s most useful magazine. Our senior people go through every issue because it is very informative on the industry’s latest developments.” **Vijay Shah is Executive Director and Chief Operating Director of Piramal Enterprises Ltd and Director of Piramal Glass**



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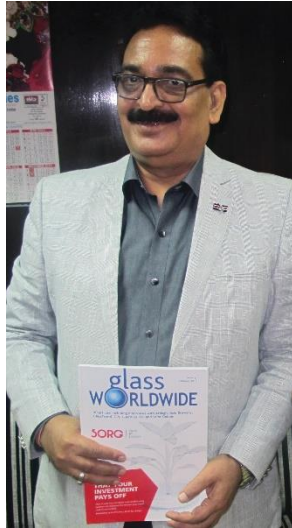
“Glass Worldwide brings us expert information and education, such as new processes, development and equipment, without which we would be starved. We need this knowledge to continue to make better quality products at lower cost.”
Pradeep Kheruka, Vice Chairman at Borosil Glass Works



“Glass Worldwide contains fantastic articles and on so many occasions I have read things that I did not know previously. Glass Worldwide brings knowledge to this part of the world where we are trying to understand the global industry and are just starting to get into the science of manufacturing.”
Sanjay Ganjoo, COO of Asahi India Glass Ltd



Emphasising the successful AIGMF/Glass Worldwide partnership, a selection of comments from AIGMF dignitaries include:



“Glass Worldwide is the magazine that keeps us updated on the latest trends and information from the glass industry worldwide. Glass Worldwide is very popular among glass professionals in India and is often a common point of reference and discussion.” **Mr S S Parmar, Director of Vitrum Glass (Empire)**



“Cooperation with Glass Worldwide is very good because it is recognised as the best glass magazine outside India.” **Sushil Kumar Jhunjunwala, Managing Director of La Opala RG Ltd**



Thank you for your time



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