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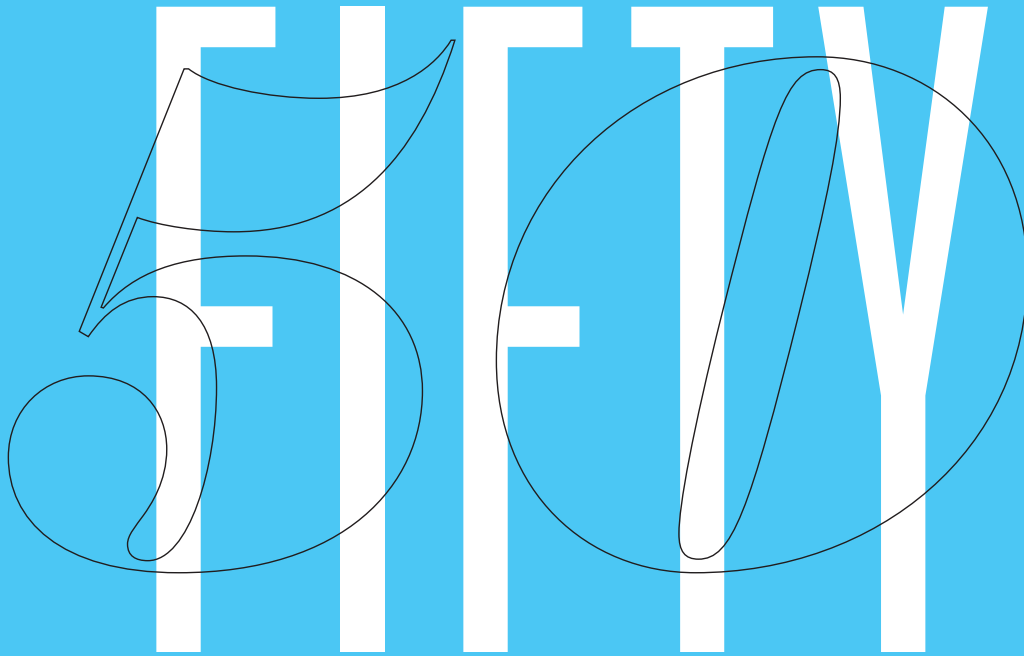
**WINDOWS FOR
RETROFIT**

**FEATS OF
FABRICATION:
VETERANS
MEMORIAL**

TOP 50 GLAZIERS

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T O P



G L A Z I E R S

U.S. contract glaziers see higher sales in face of a growing labor shortage, constraints on supply, and increasing project complexity

BY KATY DEVLIN

Seventy-one percent of Glass Magazine's Top 50 Glaziers reported an increase in year-over-year sales in 2014. This marks the third consecutive year in which at least two-thirds of Top 50 companies saw growth.

2014 was also a year of more meaningful growth for many Top 50 companies. Ten companies saw sales increase 50 percent or more compared to 2013, with four companies reporting a doubling in year-over-year sales.

However, even as market conditions improved, contract glaziers reported three primary challenges: labor shortages, constraints on material supply, and projects of increasing complexity.

A number of Top 50 companies reported that demand outpaced supply for some materials in 2014. "The biggest challenge our company faced in 2014 was a lack of supplier capacity," said officials from No. 2 Enclos Corp., enclos.com.

Strains on material supply have contributed to longer lead times, some material price increases, and the necessity for increased planning, among other challenges, companies report. Officials from No. 12, Massey's Plate Glass & Aluminum Inc., masseyglass.com, said their biggest challenge was "getting materials from vendors as lead times went [farther] out than expected."

"Our customers expect schedules to always be met. Lead times from our vendor partners have lengthened within the past year and we see this as a challenge going into 2015," adds David Martin of No. 36 H.J. Martin & Son Inc., hjmartin.com.

The improving market has also shed even more light on the lack of qualified labor. The biggest challenge in 2014 for No. 27 Kovach, kovach.net, was "finding qualified candidates to fill project management, detailing and estimating positions," according to company officials.

"During growth periods, we have been challenged with finding quality new hires both in the office and field. The shortage of individuals entering the glazing industry has presented a challenge in 2014," says Barbara Kotosos, director of marketing and public

relations for No. 21 Giroux Glass, girouxglass.com.

Glazing companies are faced with these labor and material challenges while being tasked with ever-more-complex projects. The biggest challenge for No. 5 W&W Glass, wwglass.com, was "working on a continuous supply of design-assist projects with either [Schematic Design] or early [Design Development]," according to Jeff Haber, managing partner.

"We are worried that there is continued downward pressure on pricing even though we are seeing more complicated facades as well as shortages of materials in certain areas. We also see firms stretching out of their comfort zone and taking on projects they are not qualified for. This is resulting in the number of failures in which bonding companies are brought in to finish. The industry as a whole must act smarter, and develop a more disciplined approach to the market, and demand more appropriate margins for the risks that we are asked to undertake," says Paul Becks, executive vice president

for No. 26 National Enclosure Company Inc., nationalenclosure.com.

These challenges are "almost the polar opposite of the challenges that we were faced with just a few short years ago during the prolonged economic downturn," says Lou Sigman, president of No. 32 Horizon Glass, horizonglass.net. "Now, in a much improved non-residential construction market, we are finding ourselves challenged to not over-sell our available project management and manpower resources. ... We would much rather have this challenge than that of scrounging for good projects to bid."

The following feature presents the list of Top 50 Glaziers, based on 2014 sales volume; market statistics related to bid levels, profit margins, competition, employment, and building segment activity; and notable projects from a selection of companies. The report also looks at the U.S. glazing market over the past decade, from the years leading up to the 2007 peak, through the downturn, and the gradual rebound of the last several years.

About the list

The annual Top 50 rankings present what Glass Magazine editors believe to be the United States' 50 largest contract glazing firms, based on sales volumes. The glazing firms are ranked within eight sales categories.

Information from 49 of the Top 50 comes directly from contract glazing firms or from financial reports from publicly traded parent companies.

We understand the sensitivity of releasing sales figures; however, we do not omit any firms simply because they ask. In cases where a company declines to provide information, we use independent sources to determine its ranking.

If your company belongs on the list, or you would like to update its information, please contact us. It is only with the cooperation of individual companies that Glass Magazine's Top 50 Glaziers rankings can be as accurate as possible. Questions or comments about this year's rankings, and requests to be included next year, can be sent to Katy Devlin at kdevlin@glass.org.

THE BIG PICTURE

Four new companies joined the Top 50 Glaziers list in 2014

No. 8 [Ventana Design Build Systems](#) Chicago; [ventana.vc](#)

No. 36 [H.J. Martin & Son Inc.](#) Green Bay, Wisconsin; [hjmartin.com](#)

No. 39 [Dallas Glass](#) Salem, Oregon; [dallasglass.net](#)

No. 46 [Wind Ready Inc.](#) Miami; [windready.info](#)

Two companies added locations in 2014

No. 8 [Ventana Design Build Systems](#) began operations in March 2014, with eight locations and 460 total employees.

No. 12 [Massey's Plate Glass & Aluminum](#) opened one location with 20 employees.

THE LIST

TOP 50 U.S. GLAZIERS BASED ON 2014 SALES

01

\$300 - \$400 million

Permasteelisa North America

www.permasteelisagroup.com
Windsor, CT

Previous rank: 5
Sales: Up .9 percent
U.S. locations: Five
Sales for 2014 Fiscal Year (April 1, 2013 to March 31, 2014), reported by parent company Lixil, www.lixil-group.co.jp.

02

\$200 - \$300 million

Enclos Corp.

www.enclos.com
Eagan, MN

Previous rank: 1
U.S. locations: 19
Full-time employees: 739
Total employees: 752

03

Walters & Wolf

waltersandwolf.com
Fremont, CA

Previous rank: 3
Sales: Up 18.4 percent
U.S. locations: Five
Full-time employees: 733
Total employees: 733

04

Harmon Inc.

harmoninc.com
Bloomington, MN

Previous rank: 2
Sales: Up 7.9 percent
U.S. locations: 15
Full-time employees: 627
Total employees: 752

05

\$100 - \$200 million

W&W Glass LLC

wglass.com
Nanuet, NY

Previous rank: 6
Sales: Up 10 percent
U.S. locations: One
Full-time employees: 175
Total employees: 175

06

Architectural Glass & Aluminum

aga-ca.com
Livermore, CA

Previous rank: 8
Sales: Up 33.3 percent
U.S. locations: Three
Full-time employees: 280
Total employees: 320

07

Gamma North America

gammana.com
Concord, ON

Previous rank: 7
Sales: Up 19.3 percent
North American locations:
Eight
Sales reported by parent com-
pany Far East Global Group Ltd.

08

**Ventana Design
Build Systems LLC**

ventana.vc
Chicago, IL

Previous rank: N/A
U.S. locations: Seven
Full-time employees: 20
Total employees: 50
Sales based on first full year
since start of operations (March
2014-March 2015).

09

***Benson Industries**

bensonglobal.com
Portland, OR

Previous rank: 4
U.S. locations: Seven
Employees: 600+
*estimate

10

\$50 - \$100
million

**Karas & Karas
Glass Co. Inc.**

karasglass.com
South Boston, MA

Previous rank: 10
Sales: Up 35.2 percent
U.S. locations: Two
Full-time employees: 85
Total employees: 98

11

Admiral Glass

admiralglass.net
Houston, TX

Previous rank: 13
Sales: Up 30.4 percent
U.S. locations: Two
Full-time employees: 346
Total employees: 346

12

**Massey's Plate Glass &
Aluminum Inc.**

masseysglass.com
Branford, CT

Previous rank: 11
Sales: Up 9.6 percent
U.S. locations: Three
Full-time employees: 200
Total employees: 200

13

**Architectural Wall Systems
LLC**

www.archwall.com
Clive, IA

Previous rank: 12
Sales: Up 13.4 percent
U.S. locations: Two
Full-time employees: 100
Total employees: 125

14

\$40 - \$50
million

Haley-Greer Inc.

haleygreer.com
Dallas, TX

Previous rank: 30
Sales: Up 63 percent
U.S. locations: Two
Full-time employees: 150
Total employees: 150

15

**Alliance Glazing
Technologies**

allianceglazing.com
Romeoville, IL

Previous rank: 18
Sales: Up 41.9 percent
U.S. locations: Three
Full-time employees: 220
Total employees: 330

THE LIST

16

Tower Glass Inc.

TowerGlass.com
Santee, CA

Previous rank: 14
Sales: Down 4.9 percent
U.S. locations: Two
Full-time employees: 180
Total employees: 220

17

TSI Corporations

tsicorporations.com
Upper Marlboro, MD

Previous rank: 9
Sales: Down 10.6 percent
U.S. locations: One
Full-time employees: 175
Total employees: 180

\$30 - \$40
million

18

Ajay Glass Co.

ajayglass.com
Canandaigua, NY

Previous rank: 17
Sales: Down 8.2 percent
U.S. locations: Two
Full-time employees: 125
Total employees: 250

19

Champion Metal & Glass Inc.

championmetalglass.com
Hauppauge, NY

Previous rank: 22
Sales: Up 19.2 percent
U.S. locations: One
Full-time employees: 95
Total employees: 105

20

Cherry Hill Glass Co. Inc

cherryhillglass.com
Branford, CT

Previous rank: 21
Sales: Up 7.1 percent
U.S. locations: One
Full-time employees: 85
Total employees: 90

21

Giroux Glass Inc.

girouxglass.com
Los Angeles, CA

Previous rank: 23
Sales: Up 9.5 percent
U.S. locations: Four
Full-time employees: 173
Total employees: 178

\$20 - \$30
million

22

SPS Corporation

spscorporation.com
Apex, NC

Previous rank: 19
Sales: Down 10.4 percent
U.S. locations: Two
Full-time employees: 100
Total employees: 100

23

LCG Facades

lcfgacades.com
Salt Lake City, UT

Previous rank: 24
Sales: Up 8.3 percent
U.S. locations: One
Full-time employees: 125
Total employees: 125

24

Zephyr Aluminum LLC

zephyraluminum.com
Lancaster, PA

Previous rank: 39/40
Sales: Up 92.3 percent
U.S. locations: Three
Full-time employees: 74
Total employees: 74

THE LIST
25**Juba Aluminum Products Co.**

jubaproducts.com
Concord, NC

Previous rank: N/A
Sales: Up 27.1 percent
U.S. locations: One
Full-time employees: 99
Total employees: 99

26**National Enclosure Company Inc.**

NationalEnclosure.com
Ypsilanti, MI

Previous rank: 20
Sales: Down 27.7 percent
U.S. locations: Four
Full-time employees: 100
Total employees: 100

27**Kovach Inc**

kovach.net
Chandler, AZ

Previous rank: 15
Sales: Up 140.4 percent
U.S. locations: Two
Full-time employees: 253
Total employees: 253

28**Dynamic Glass LLC**

www.dynamicglass.com
Houston, TX

Previous rank: 41
Sales: Up 75.4 percent
U.S. locations: One
Full-time employees: 90
Total employees: 90

29**Metropolitan Glass Inc.**

www.metroglass.com
Denver, CO

Previous rank: 34
Sales: Up 32.7 percent
U.S. locations: One
Full-time employees: 102
Total employees: 102

30**R & R Window Contractors Inc.**

www.rrwindow.com
Easthampton, MA

Previous rank: 26
Sales: Down 11 percent
U.S. locations: One
Full-time employees: 80
Total employees: 82

31**Alexander Metals Inc.**

alexandermetalsinc.com
Nashville, TN

Previous rank: 27
Sales: Down 10.7 percent
U.S. locations: One
Full-time employees: 95
Total employees: 95

32**Horizon Glass**

horizonglass.net
Denver, CO

Previous rank: 49
Sales: Up 74.5 percent
U.S. locations: One
Full-time employees: 85
Total employees: 85



\$10 - \$20 million

33**Hilboldt Curtainwall Inc.**

hilboldt.com
St. Louis, MO

Previous rank: 35/36
Sales: Up 24.3 percent
U.S. locations: One
Full-time employees: 45
Total employees: 45

34

Sunset Glazing

sunsetglazing.com
La Mesa, CA

Previous rank: 57
Sales: Up 147.4 percent
U.S. locations: One
Full-time employees: 5
Total employees: 35 to 50

35

D-M Products Inc.

dmproductsinc.com
Bethel Park, PA

Previous rank: N/A
Sales: Up 157.1 percent
U.S. locations: One
Full-time employees: 12
Total employees: 40

36

H.J. Martin & Son Inc.

hjmartin.com
Green Bay, WI

Previous rank: N/A
Sales: Down 20.6 percent
U.S. locations: Two
Full-time employees: 50
Total employees: 50 (600 total,
with 50 in glazing)

37

**Koch Corp. (Strong
Tower Construction)**

kochcorporation.com
Louisville, KY

Previous rank: 38
Sales: Up 14.1 percent
U.S. locations: One
Full-time employees: 24
Total employees: 65

38

Ridgeview Glass Inc.

ridgeviewglass.com
Upper Marlboro, MD

Previous rank: 31
Sales: Down 17.7 percent
U.S. locations: Two
Full-time employees: 64
Total employees: 64

39

Dallas Glass

dallasglass.net
Salem, OR

Previous rank: N/A
Sales: Up 51.9 percent
U.S. locations: One
Full-time employees: 64
Total employees: 71

40

Egan Company/InterClad

eganco.com
Plymouth, MN

Previous rank: 25
Sales: Down 39.1 percent
U.S. locations: One
Full-time employees: 50
Total employees: 85

41

Specified Systems Inc.

specifiedsystems.com
Canonsburg, PA

Previous rank: 44/45
Sales: Up 17.6 percent
U.S. locations: Two
Full-time employees: 29
Total employees: 79 (up to 50
skilled field erection staff)

42

**Denison Glass
& Mirror Inc.**

denisonglass.com
Denison, TX

Previous rank: 44/45
Sales: Up 20.5 percent
U.S. locations: One
Full-time employees: 98
Total employees: 98

THE LIST

43

Crawford-Tracey Corp.

crawfordtracey.com
Deerfield Beach, FL

Previous rank: 42/43
Sales: Up 4.1 percent
U.S. locations: Two
Full-time employees: 75
Total employees: 80

44

Heinaman Contract Glazing

heinaman.net
Lake Forest, CA

Previous rank: 32
Sales: Down 24.2 percent
U.S. locations: Two
Full-time employees: 16
Total employees: 50

45

Walker and Laberge Co. Inc.

walkerandlaberge.com
Norfolk, VA

Previous rank: 28
Sales: Down 42.6 percent
U.S. locations: Three
Full-time employees: 85
Total employees: 85
Sales estimate, as fiscal year ends April 30.

46

Wind Ready Inc.

windready.info
Miami, FL

Previous rank: N/A
Sales: Up 100 percent
U.S. locations: One
Full-time employees: 45
Total employees: 75

47

ACE Glass

aceglass.net
Little Rock, AR

Previous rank: 46
Sales: Up 2.7 percent
U.S. locations: Two
Full-time employees: 130
Total employees: 130

48

AHC Glass

ahcglassinc.com
Hayward, CA

Previous rank: 50
Sales: Up 15.3 percent
U.S. locations: One
Full-time employees: 65
Total employees: 80

49

Bacon & Van Buskirk

bvbglass.com, bamuntins.com
Champaign, IL

Previous rank: 48
Sales: Down 2.8 percent
U.S. locations: Two
Full-time employees: 49
Total employees: varies

50

Hale Glass Inc.

HaleGlass.com
Placentia, CA

Previous rank: 47
Sales: Down 11.6 percent
U.S. locations: One
Full-time employees: 50
Total employees: 50

\$10 million and below

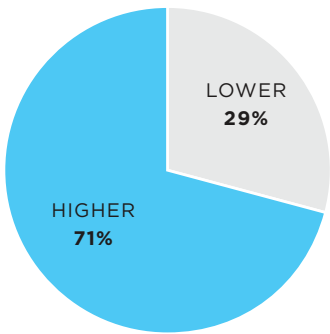
ONLINE

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THE MARKET

SALES CONTINUE TO EXPAND FOR TOP 50 GLAZIERS IN 2014

How did glaziers' 2014 overall sales compare to 2013?



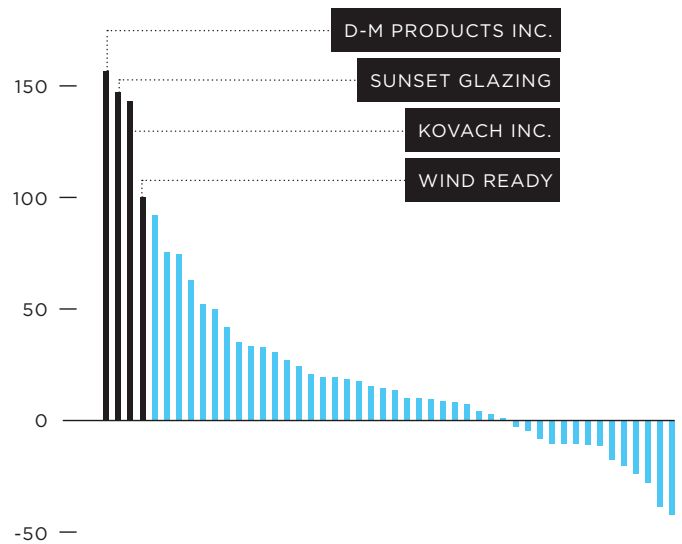
2014 marked another year of growth for most Top 50 Glaziers, with 71 percent of companies reporting an increase in sales from 2013 to 2014, and 29 percent reporting a decrease in year-over-year sales. This marks back-to-back improvements in sales for the majority of Top 50 glaziers, as 74 percent of glaziers reported y-o-y sales increases from 2012 to 2013. See The Trends on page 48 for additional historical sales data.

Top 50 glaziers, by sales volume (in millions)

\$300-400	1
\$200-300	3
\$100-200	5
\$50-\$100	4
\$40-\$50	3
\$30-\$40	4
\$20-\$30	11
\$10-\$20	18
\$10 AND BELOW	1

Once again, the majority of Glass Magazine's Top 50 Glaziers—29 companies—reported sales between \$10 million and \$30 million in 2014. Additionally, the glaziers with the highest levels of sales volumes in 2014 reported strong years. Four companies reported sales topping \$200 million in 2014, compared to just one company in 2013. And, one additional sales range category was added: \$300 million to \$400 million.

Change in sales for each company between 2013 and 2014



Of the companies reporting y-o-y sales increases, 10 companies reported sales increases of 50 percent or more. Of those, four companies—D-M Products Inc., Kovach Inc., Sunset Glazing and Wind Ready—reported sales increases of 100 percent or more. Five companies reported sales increases of 25 to 50 percent, and 19 companies saw sales increase 0 to 25 percent.

Of companies reporting y-o-y decreases, 11 companies saw decreases of 25 percent or less. Three companies saw sales decline more than 25 percent.