

# GLASS

MAGAZINE®

THE GLASS AND GLAZING AUTHORITY

GLASSMAGAZINE.COM

JUNE 2019

**GLASS UNDER  
FIRE IN NYC**

**WORKFORCE  
DEVELOPMENT**

**GLASSBUILD  
AMERICA  
PREVIEW**

**TOP 50  
GLAZIERS**

**SALES UP,  
BUT SIGNS OF  
SLOWING?**

OFFICIAL PUBLICATION

**NGA**

NATIONAL  
GLASS ASSOCIATION  
with GANA

GLASS.ORG

# TOP 50 GLAZIERS

ARCHITECTURAL  
WALL SYSTEMS

-

KRAUSE  
GATEWAY  
CENTER

-

DES MOINES,  
IOWA

-

PHOTO BY  
MICHEL  
DENANCÉ







BY NORAH DICK

The following report captures the current market reality of the glazing industry. Glass Magazine's annual Top 50 Glaziers program, now in its 27th year, looks at the health of the glazing market by surveying top glazing companies about sales, bid levels, profit margins and staffing. Market statistics also provide benchmarks for levels of activity by region, and by building segment.

For a list of the Top 50 glazing companies serving the United States, ranked by sales volume, see pages 55-57. Projects from these companies are showcased throughout the feature. In addition to the ranked List, the report again includes our list of Glazier Partners, standout glazing companies nominated by their fabricator partners, found on pages 56-57.



## 38. SALES

-

SALES UP,  
BUT SIGNS OF  
SLOWING?



## 44. MARKET

-

COMMERCIAL  
CONSTRUCTION,  
NORTHEAST  
REGION, DRIVE  
MARKET



## 50. CHALLENGES

-

LABOR,  
SCHEDULING,  
TARIFFS



## 54. COMPANIES

-

RANKED BY  
SALES, PLUS  
TOP GLAZIER  
PARTNERS

# 01-SALES

## SALES UP, BUT SIGNS OF SLOWING?

The glazing market remained strong in 2018, with gross sales for Top 50 Glaziers at nearly \$4 billion. A slight majority of Top 50 Glaziers—55 percent—reported year-over-year growth from 2017 to 2018. Eight Top 50 companies opened new locations or expanded existing facilities. And expansions and new locations meant new equipment for many companies.

However, several survey data points indicate a slowdown in growth. While 55 percent of companies reported gains in 2018, the number is down from 67 percent in 2017 and 74 percent in 2016.

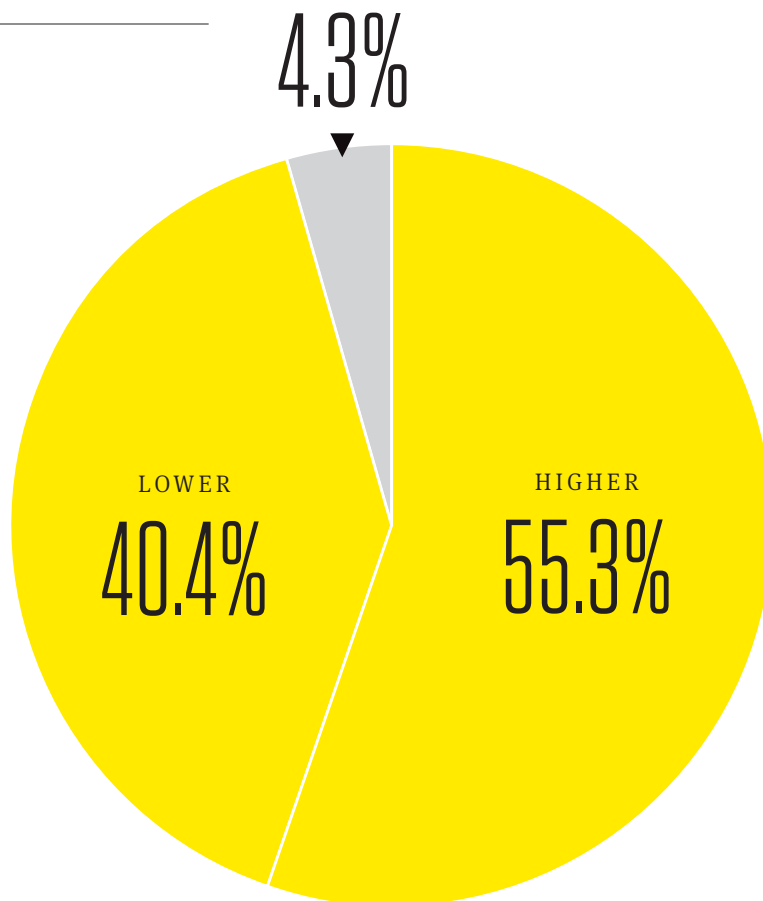
Gross sales, while impressive at \$3.8 billion for all Top 50 companies, were down 12 percent compared to the previous year. Part of the decrease in gross sales appears to come from declining sales among the industry's largest firms. Last year's No. 1 firm topped \$600 million in sales; this year, the largest firm reported sales under \$500 million. The number of companies reporting sales above \$100 million fell from 12 in 2017 to nine in 2018.

The number of companies in the lowest sales range of the Top 50—\$20-\$30 million—rose from 12 companies in 2017 to 18 companies in 2018.

The slowdown in growth among glaziers mirrors the trend in the overall construction economy in 2018. As reported in Glass Magazine's 2019 forecast in the January/February issue, overall construction starts in dollars rose about 3 percent in 2018, the smallest increase in the last six years. Growth in many construction categories slowed, with a few exceptions, including multifamily housing and commercial building, which remained at an increase of 2 percent for both 2017 and 2018.

**01** HOW DID TOP 50  
GLAZIERS' 2018 SALES  
COMPARE TO 2017?

ABOUT THE SAME

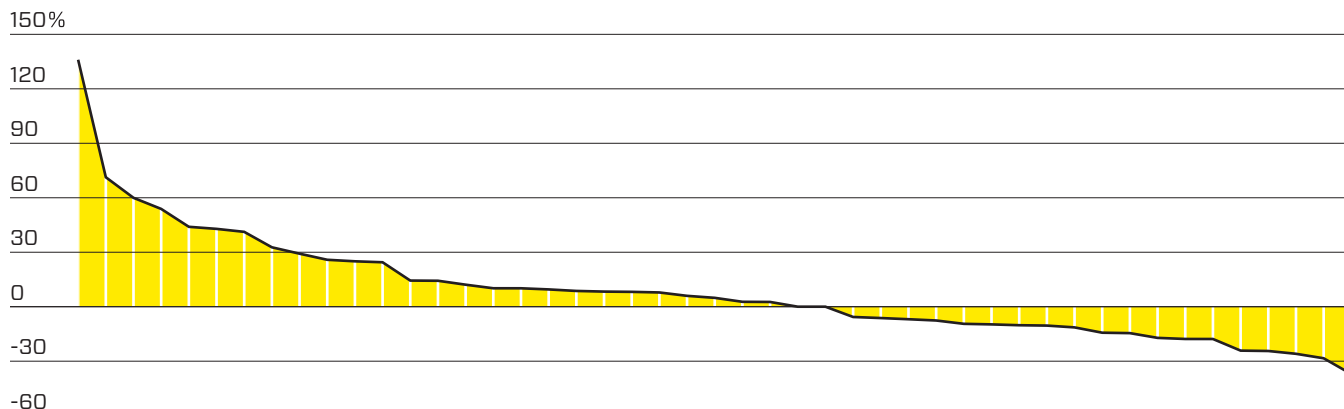


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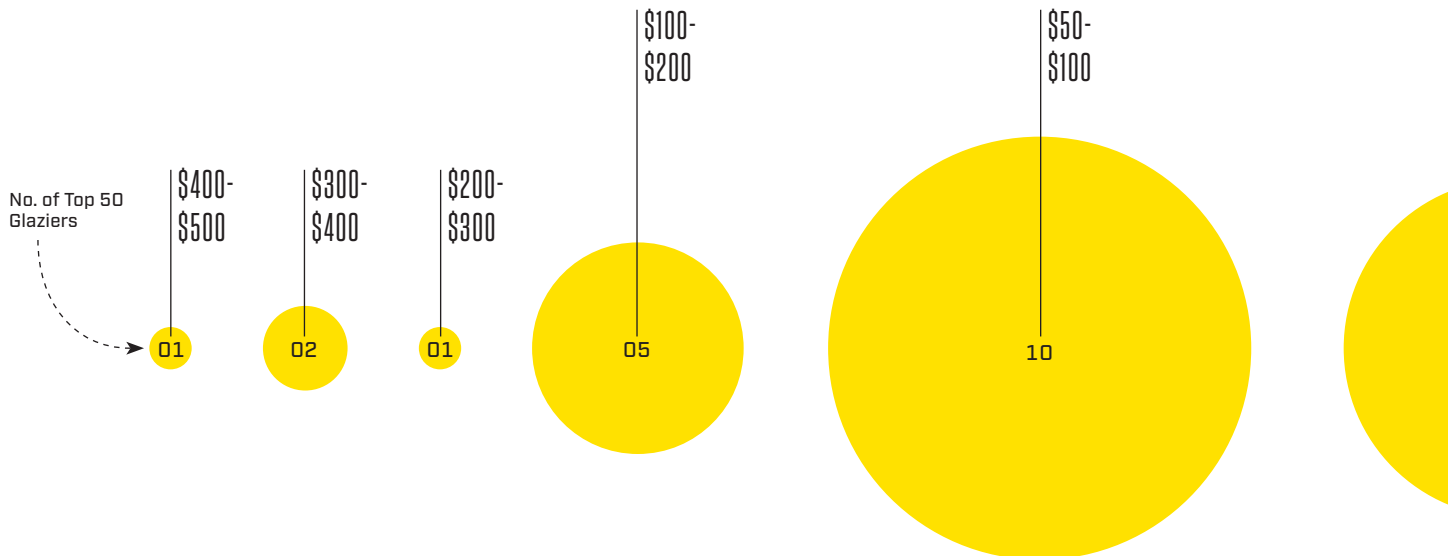
"THIS MANY YEARS INTO AN ECONOMIC EXPANSION IT'S NORMAL TO THINK THE END IS AROUND THE CORNER. HOWEVER, RIGHT NOW THE OUTLOOK REMAINS POSITIVE FOR THE NEXT 18-24 MONTHS. THE NUMBER OF NEW PROJECTS ON THE STREET OUT FOR BIDDING OR NEGOTIATION IS AS STRONG AS EVER."

—JEFF HABER, MANAGING PARTNER, W&W GLASS, [WWGLASS.COM](http://WWGLASS.COM)

**02** YEAR-OVER-YEAR % CHANGE IN SALES  
FOR REPORTING COMPANIES, 2017-2018



### 03 TOP 50 GLAZIERS, GROUPED BY SALES CATEGORY (IN MILLIONS)

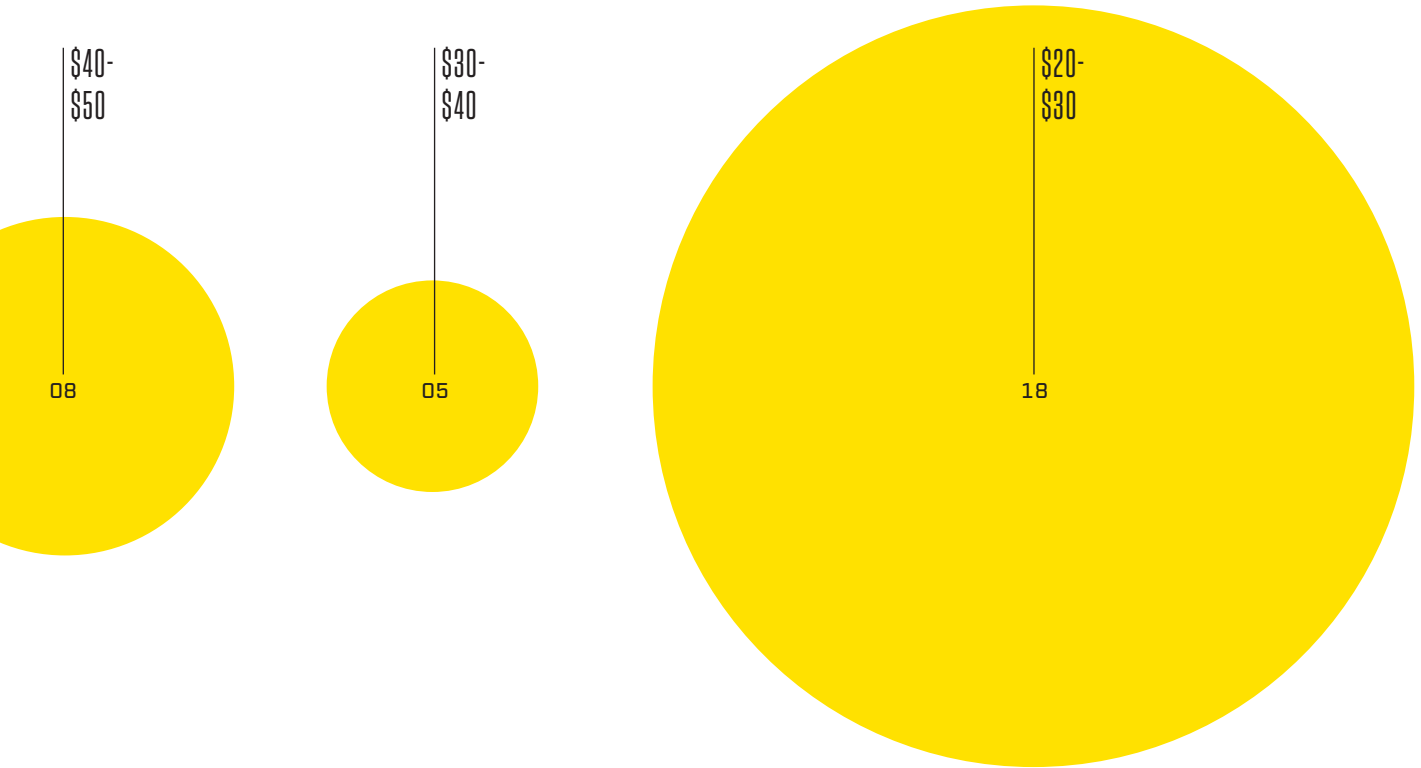


### 04 NUMBER OF COMPANIES THAT OPENED OR EXPANDED LOCATIONS

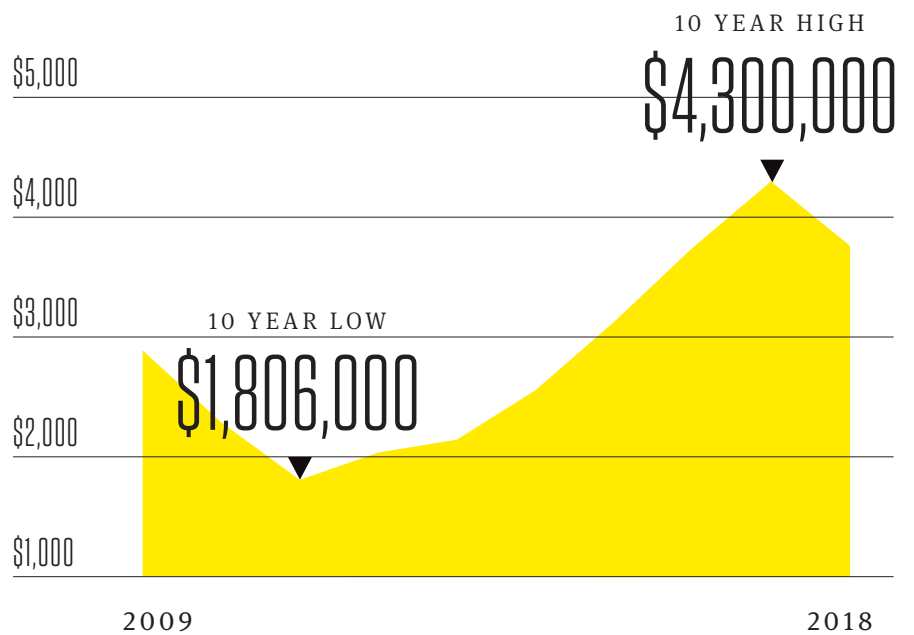
#### QUOTED

"SINCE WE HAVE A NEW SHOP FACILITY, WE HAVE PURCHASED A WATER JET MACHINE, SHEAR AND BRAKE, AND TABLE SAWS TO HELP US GROW OUR FABRICATION PROCESS."

— LARA NEDELTSCHOFF,  
MARKETING REPRESENTATIVE,  
LAFAYETTE METAL & GLASS CO.,  
LMGNY.COM



#### 05 TOP 50 GROSS SALES, 2009-2018 (IN MILLIONS)

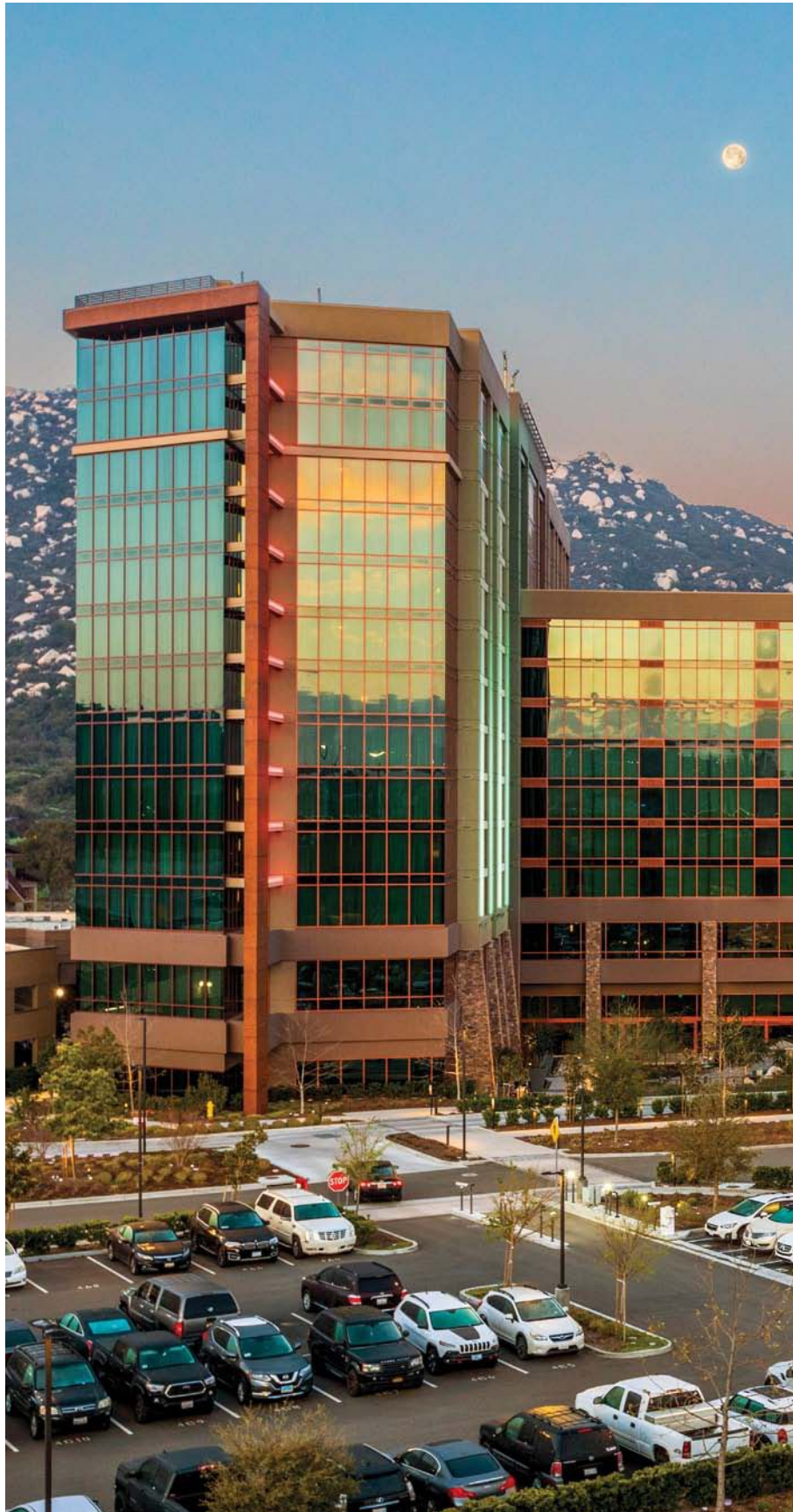




## QUOTED

“WE SEE OUR MARKET CONTINUING TO BE STRONG IN 2019 AND INTO 2020, WITH A STRONG FOCUS ON DESIGN ASSIST/DESIGN BUILD PROJECTS. AS THE LARGE EXTERIOR PROJECTS START TO DECREASE, WE WILL SEE [AN] INCREASE IN INTERIOR TENANT IMPROVEMENT PROJECTS AS WELL AS [IN] HEALTHCARE AND INSTITUTIONAL PROJECTS.”

— LAURA MCCAFFERTY,  
MARKETING MANAGER,  
GLASS SOLUTIONS INC.,  
GSICHICAGO.COM





GIROUX GLASS  
-  
PECHANGA RESORT  
AND CASINO  
-  
TEMECULA, CA  
-  
PHOTO BY BRIAN  
PEREGRINA



# 02-MARKET

## COMMERCIAL CONSTRUCTION, NORTHEAST REGION, DRIVE MARKET

The bidding environment showed signs of mild improvement in 2018. About half of reporting Top 50 companies posted higher bid levels, with only about 5 percent reporting a decline. Competition remained steady as 59 percent of companies said levels were the same as the year prior. About a third of companies also reported an increase in profit margins, with another 62 percent reporting no change from last year.

New construction dominated work for Top 50 companies, with about 84 percent of jobs. Looking by sector, commercial projects accounted for 48 percent of work, with institutional at 21 percent and multifamily at 15 percent. This marks a slight shift from 2017, when 45 percent of the market was commercial, 30 percent institutional and 20 percent multifamily.

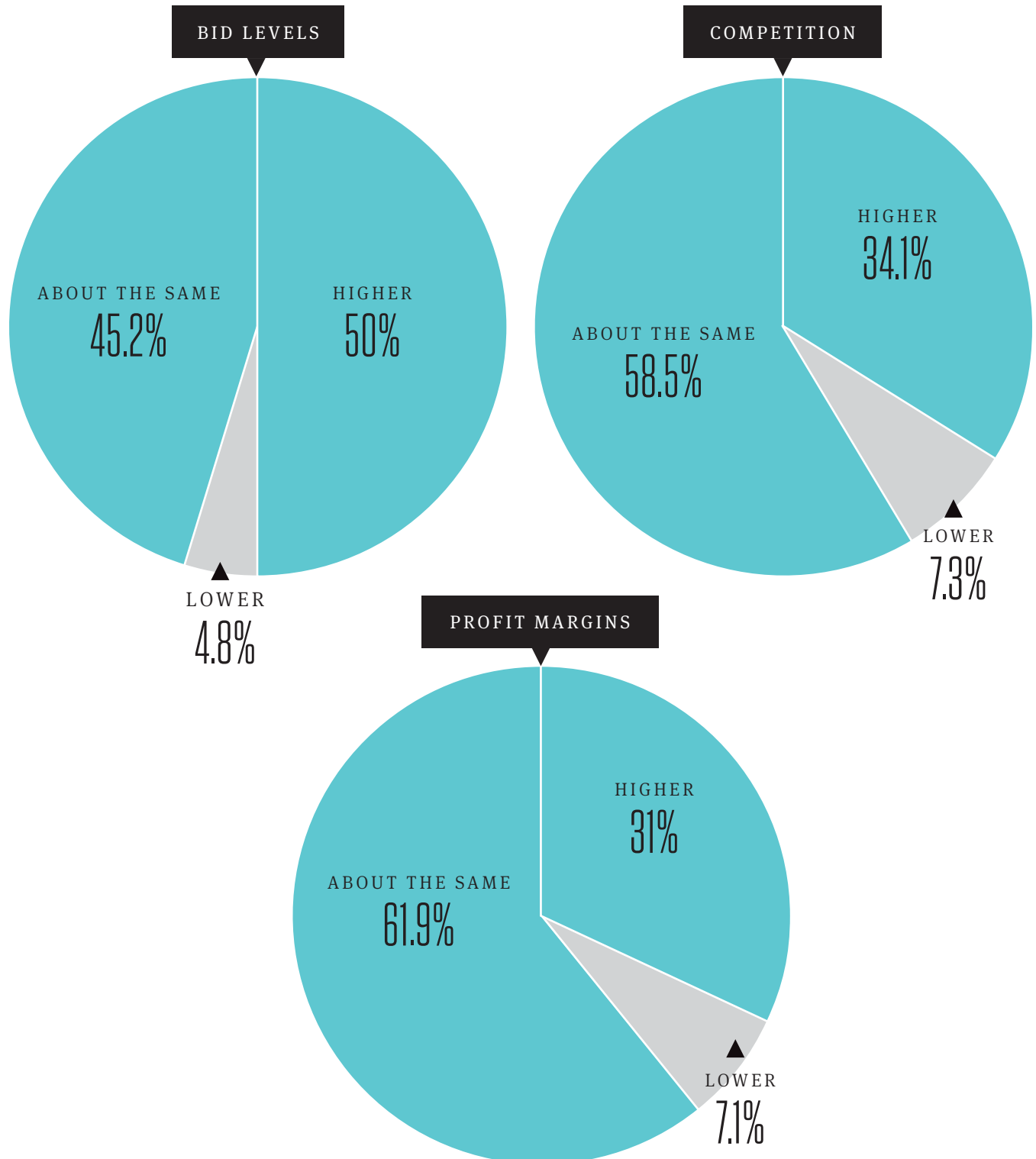
In terms of geographic markets, the Northeast offers the most opportunity for growth, according to Top 50 companies. Nearly 50 percent of survey respondents identified the Northeast as having the most potential for growth in 2019. The Southeast followed with 33 percent and the Southwest with 31 percent.

### QUOTED

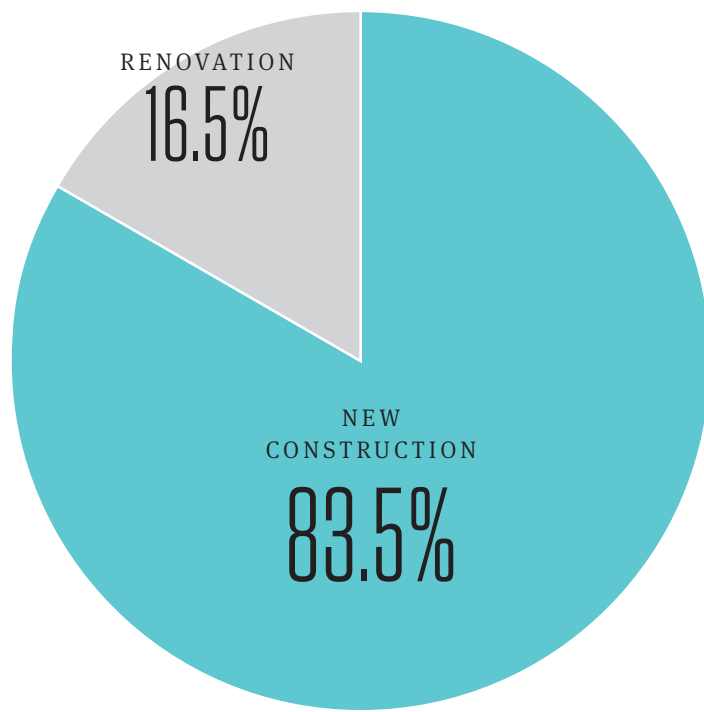
“WITH A GREAT QUANTITY OF PROJECTS OUT TO BID, THE CHALLENGE IS TO BE SELECTIVE AND SPEND OUR TIME ON THE ONES THAT ARE THE BEST FIT FOR OUR COMPANY. IN 2018 WE REALLY FOCUSED ON ALIGNING OURSELVES WITH THE RIGHT CONTRACTORS AND PROJECTS.”

— JOHN CASH, PRESIDENT, ABOVE ALL STOREFRONTS,  
[ABOVEALLSTOREFRONTS.COM](http://ABOVEALLSTOREFRONTS.COM)

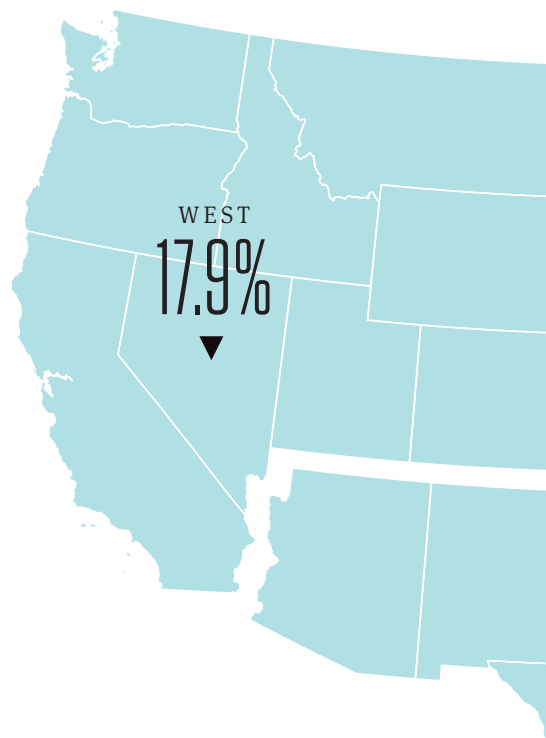
## 01 MARKET CONDITIONS IN 2018 COMPARED TO 2017



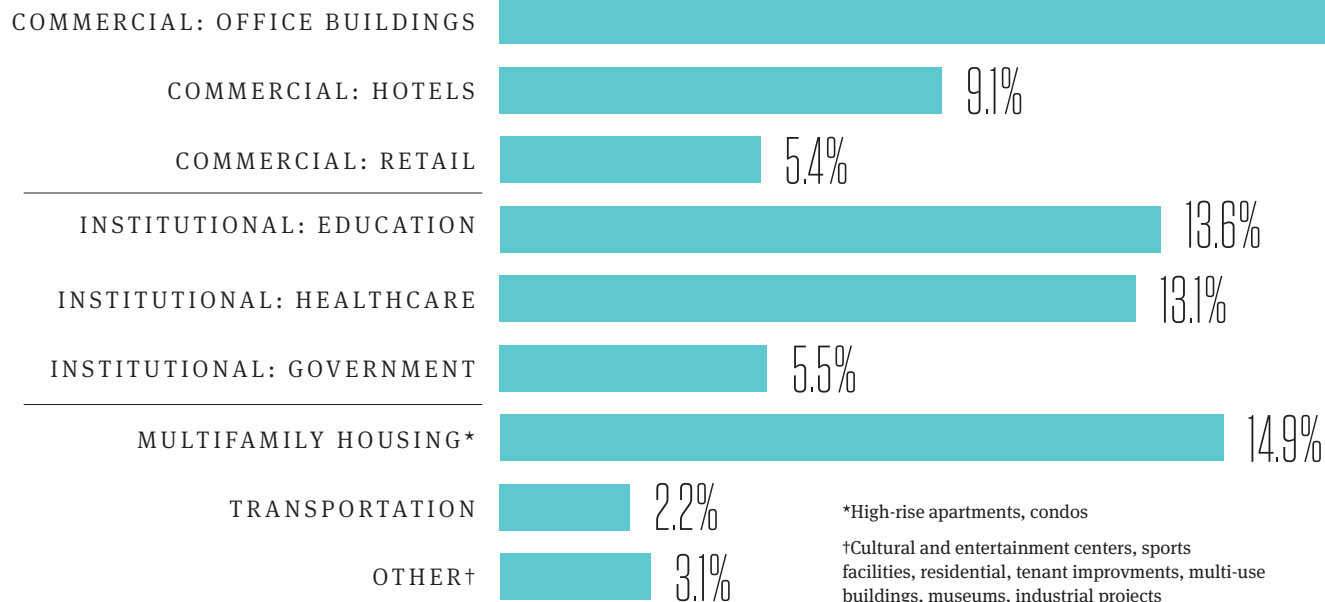
## 02 NEW CONSTRUCTION VS. RENOVATION



## 03 WHICH GEOGRAPHIC MARKETS WILL

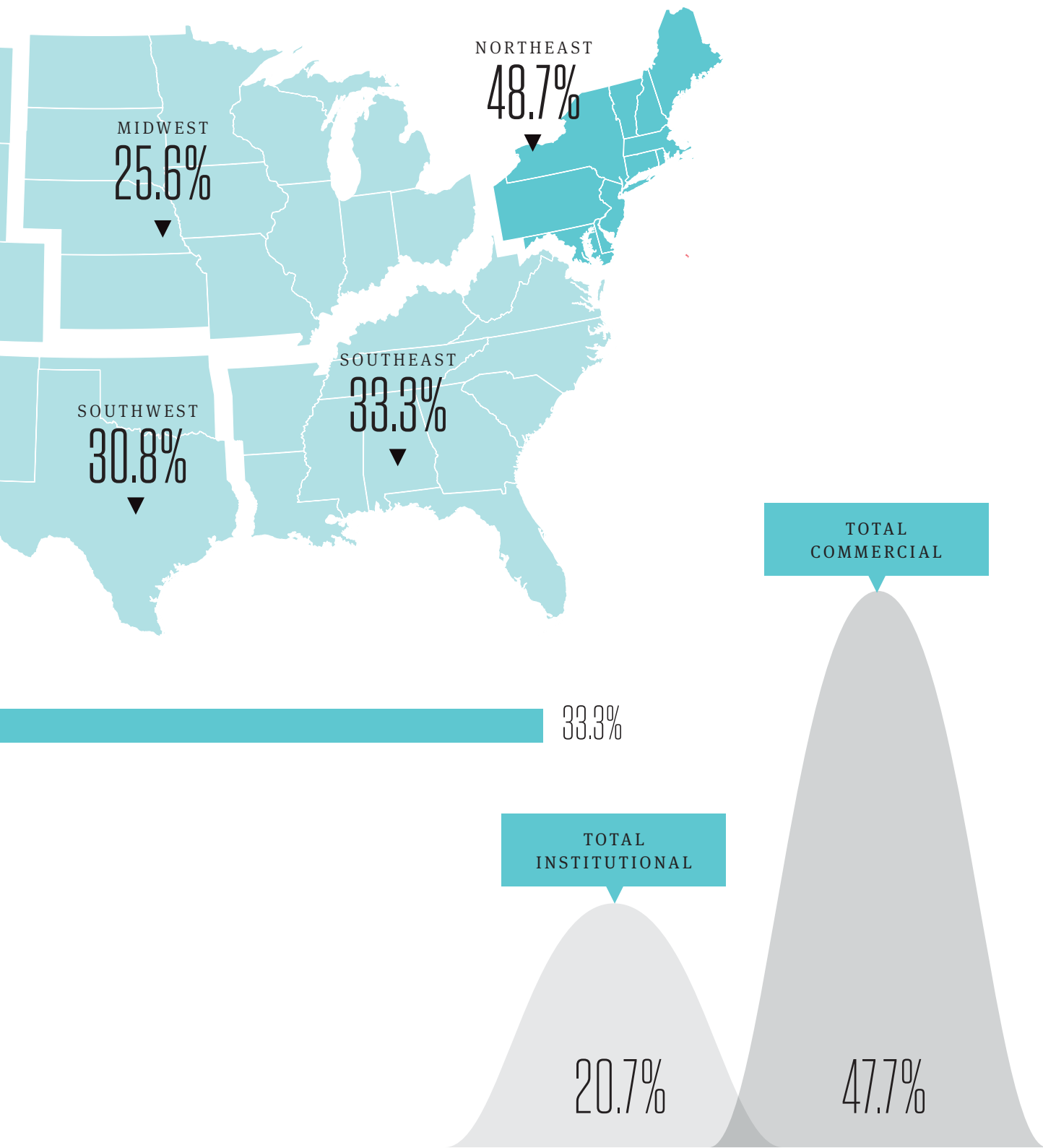


## 04 2018 PROJECTS, BY CONSTRUCTION SECTOR





SEE THE MOST GROWTH IN 2019?\*



\*SELECT ALL THAT APPLY

# 03-THE CHALLENGES

LABOR, SCHEDULING,  
TARIFFS AMONG TOP  
CHALLENGES

For the sixth consecutive year, Top 50 Glaziers have identified labor as a top challenge. More than half of respondents—55 percent—reported increased difficulty finding workers year-over-year. Glaziers and field laborers are the most difficult to find, according to 74 percent of respondents. About a third of companies add project managers to that list as well.

Other top challenges identified by Top 50 companies included managing project schedules—which is closely tied to labor concerns—lead times and ongoing trade uncertainties.

## QUOTED

“OUR BIGGEST CHALLENGE IN 2018 WAS FINDING EXPERIENCED GLAZIERS. WE HAVE BROADENED OUR RECRUITING EFFORTS TO INCLUDE ENTRY-LEVEL CONSTRUCTION AND OTHER INDUSTRIES TO FIND TEAM MEMBERS WHO CAN LEARN A TRADE THROUGH OUR APPRENTICESHIP PROGRAM.”

— ANDREA PLUNKETT, PROJECT MANAGER, JPI CORP., [JPIGLASS.COM](http://JPIGLASS.COM)

**01** DID YOU HAVE MORE DIFFICULTY FINDING WORKERS IN 2018 COMPARED TO THE PREVIOUS YEAR?

74%



GLAZIERS  
AND FIELD  
LABOR

33.5%



PROJECT  
MANAGERS

7.5%



ESTIMATORS

7.5%

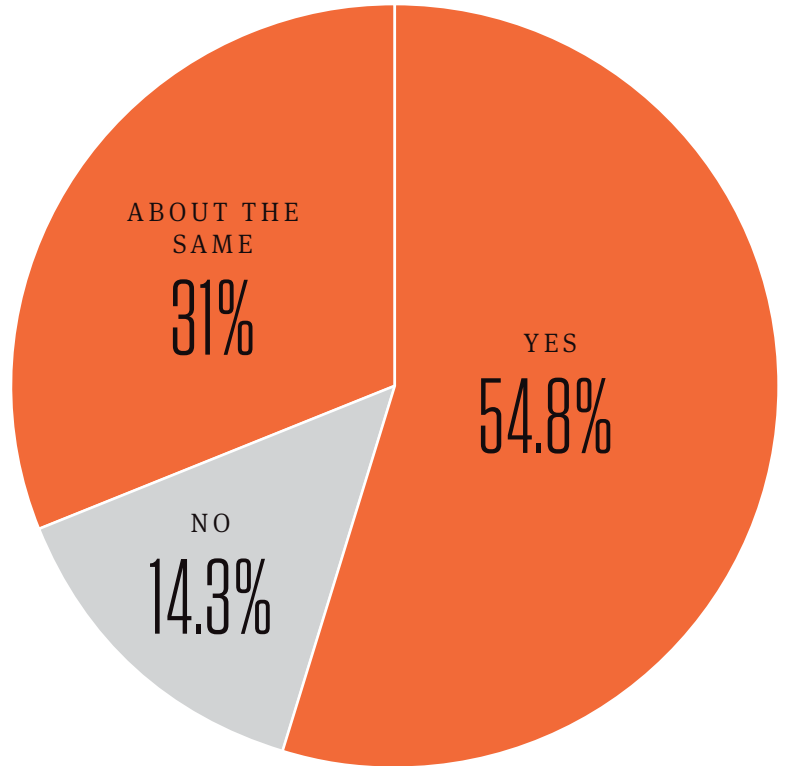


OFFICE

7.5%



OTHER



**02** IF YES, WHAT POSITIONS WERE THE MOST DIFFICULT TO FILL?\*

\*SELECT ALL THAT APPLY

## QUOTED

“OBSTACLES ARE ALWAYS POPPING UP, SUCH AS A LACK OF AVAILABLE MAN POWER, GOVERNMENT INTERVENTION WITH UNINTENDED CONSEQUENCES—TARIFFS AND MASSIVE POTENTIAL CHANGES TO THE ENERGY AND BUILDING CODES—AND SUPPLY SHORTAGES.”

— JEFF HABER, MANAGING PARTNER, W&W GLASS, WWGLASS.COM

## QUOTED

TOP CHALLENGES INCLUDE “MANAGING SLIPPING PROJECT SCHEDULES, [AND] ADJUSTING RESOURCES THROUGH MANUFACTURING AND FIELD INSTALLATIONS.”

— DAN ROMINE, VICE PRESIDENT, ARCHITECTURAL GLASS & ALUMINUM, AGA-CA.COM





CRAWFORD TRACEY  
CORP.

-  
801 LINCOLN RD.

-  
MIAMI BEACH, FL

-  
PHOTO BY EMILIO  
COLLAVINO



# 04-THE COMPANIES

## FAMILY BUSINESSES AND ESTABLISHED COMPANIES DOMINATE

The annual Top 50 Glaziers list, beginning on the next page, represents what Glass Magazine editors believe to be the largest contract glazing companies serving the United States, based on reported sales volumes. Glazing firms are ranked within each sales category. Information from 49 of the Top 50 listed companies was reported directly to Glass Magazine editors from the companies' survey submissions, or from financial reports from publicly traded parent companies. In the instance that companies decline to provide information, we use independent sources to determine the most accurate ranking.

While reported gross sales can demonstrate the current health of the industry, this year, Glass Magazine also wanted to focus on the heritage of top glazier companies, recognizing

family businesses and women-owned companies. Half of Top 50 companies report they are family-owned; 14 companies have been family-owned for two or more generations. Of those family-owned businesses, four are also woman-owned.

Companies on the list also pay tribute to both well-established businesses and relatively new ventures. The oldest company, Binswanger Glass, [binswangerglass.com](http://binswangerglass.com), is 147 years old, founded in 1872. The newest, Ventana Design-Build Systems, [ventana.vc](http://ventana.vc), opened in 2014.

While the Top 50 Glaziers list ranks glazing companies by annual gross sales, Glass Magazine recognizes that great companies come in all sizes. In an effort to recognize stand-out glazing partners, no matter their annual sales volume,

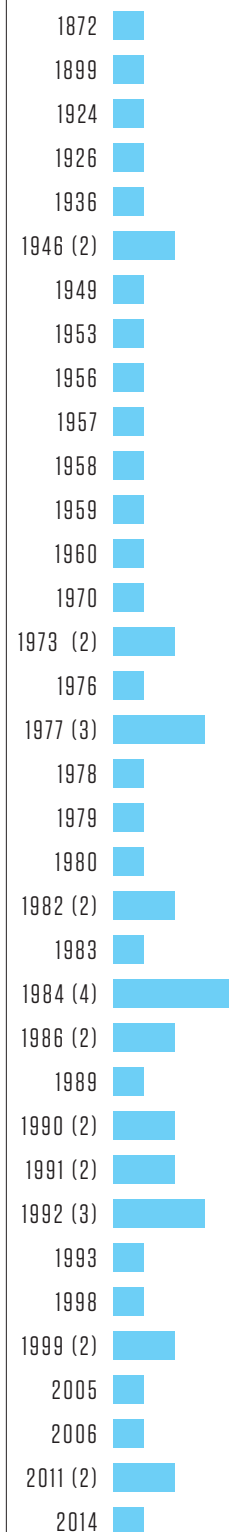
Glass Magazine looked to industry suppliers for recommendations. As part of the 2018 Top Glass Fabricators annual survey, Glass Magazine asked leading fabricators to nominate the exceptional glazing partners they worked with during the previous year. From those nominations, Glass Magazine developed the 2019 Top Glazier Partners, recognized on pages 56 and 57.

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 Norah Dick at [ndick@glass.org](mailto:ndick@glass.org).

# 01 2019 TOP 50 GLAZIERS, BY SALES (IN MILLIONS)

CURRENT RANK ▼	PREVIOUS RANK ▼	COMPANY ▼	U.S. LOCATIONS ▼	FULL-TIME EMPLOYEES ▼	TOTAL EMPLOYEES ▼	OWNERSHIP ▼
\$400+ MILLION ▼						
1	1	<b>Permasteelisa North America</b> <i>permasteelisagroup.com, Windsor, CT</i>	7	-	-	-
\$300-400 MILLION ▼						
2	2	<b>Enclos Corp.</b> <i>enclos.com, Eagan, MN</i>	15	650	650	-
3	3	<b>Benson Industries*</b> <i>bensonglobal.com, Portland, OR</i>	7	725	725	-
\$200-300 MILLION ▼						
4	4	<b>Harmon Inc.</b> <i>harmoninc.com, Bloomington, MN</i>	17	598	599	-
\$100-200 MILLION ▼						
5	16	<b>Gamma North America Inc.</b> <i>gammana.com, Concord, Ontario, Canada</i>	7	486	486	-
6	7	<b>Crown Corr Inc.</b> <i>crowncorr.com, Gary, IN</i>	4	300	300	●
7	6	<b>W&amp;W Glass</b> <i>wwglass.com, Nanuet, NY</i>	1	175	175	●
8	5	<b>Walters &amp; Wolf*</b> <i>waltersandwolf.com, Fremont, CA</i>	7	-	-	-
9	9	<b>Binswanger Glass</b> <i>binswangerglass.com, Memphis, TN</i>	61	869	892	-
\$50-100 MILLION ▼						
10	17	<b>Karas &amp; Karas Glass Co.</b> <i>karasglass.com, Boston</i>	2	90	147	-
11	11	<b>Architectural Glass &amp; Aluminum</b> <i>aga-ca.com, Livermore, CA</i>	2	300	300	-
12	21	<b>Massey's Plate Glass &amp; Aluminum Inc.</b> <i>masseysglass.com, Branford, CT</i>	3	-	330	-
13	14	<b>seele Inc.</b> <i>seele.com, New York City</i>	1	19	100	-
14	18	<b>Pioneer Cladding &amp; Glazing Systems Inc.</b> <i>pioneercladding.com, Mason, OH</i>	6	308	308	-

# 02 WHEN WERE TOP 50 GLAZIERS ESTABLISHED?



### 03 TOP GLAZIER PARTNERS\*\*

#### ClearVue Glass & Mirror

clearvueglassatlanta.com  
Marietta, GA

ClearVue Glass & Mirror "recently completed the Chick-Fil-A headquarters project that incorporated multi-surfaced etched glass within the IGUs [on a] 3-story curtain wall. ClearVue really stood out with their expert project management, communications, and ability to glaze on such a complicated and challenging project." —FGD Glass Solutions | On-Site Systems, fgdglass.com

#### Glastech Glazing Contractors

glastech.ca  
Port Coquitlam, BC, Canada

"We have worked on numerous projects with Glastech, including [Simon Fraser University's] SE3P Building. They are always willing to take on unique and challenging projects, creating custom designs and working closely with us as the fabricator to ensure the design allows for the most streamlined fabrication processes while providing high quality results that meet or exceed expectations." —Vitrum Glass Group, vitrum.ca

\*\*BASED ON NOMINATIONS FROM TOP GLASS FABRICATORS

CURRENT RANK ▼	PREVIOUS RANK ▼	COMPANY ▼	U.S. LOCATIONS ▼	FULL-TIME EMPLOYEES ▼	TOTAL EMPLOYEES ▼	OWNERSHIP ▼
15	23	<b>Ventana Design-Build Systems</b> ventana.vc, Chicago	3	28	28	
16	19	<b>TSI Corp.</b> tsicorporations.com, Upper Marlboro, MD	1	210	210	●
17	30	<b>Architectural Wall Systems LLC</b> archwall.com, Des Moines, IA	2	110	119	
18	22	<b>RynoClad Technologies Inc.</b> rynoclad.com, Ontario, CA	2	98	98	●
19	15	<b>Alliance Glazing Technologies</b> allianceglazing.com, Romeoville, IL	3	250	250	
\$40-50 MILLION ▼						
20/21	24	<b>Giroux Glass Inc.</b> girouxglass.com, Los Angeles	4	88	201	
20/21	29	<b>Above All Store Fronts</b> aboveallstorefronts.com, Hauppauge, NY	1	207	207	●
22	27	<b>Admiral Glass Co.</b> admiralglass.net, Houston	3	295	295	●
23/24	33	<b>Glass Solutions Inc.</b> gsichicago.com, Itasca, IL	1	98	101	●
23/24	25	<b>Haley-Greer Inc.</b> haleygreer.com, Dallas	2	150	150	●○
25	36	<b>Kensington Glass Arts</b> kensingtonglass.com, Ijamsville, MD	3	200	200	
26		<b>Ranger Specialized Glass Inc.</b> rangerglass.com, Houston	2	130	130	●
27	37/38	<b>Lafayette Metal and Glass Co.</b> lmgn.com, Hauppauge, NY	2	120	120	●○
\$30-40 MILLION ▼						
28	32	<b>Egan Company/InterClad</b> eganca.com, Brooklyn Park, MN	4	100	100	
29/30	34	<b>Cherry Hill Glass Co.</b> cherryhillglass.com, Branford, CT	1	135	150	●
29/30	28	<b>Tower Glass Inc.</b> towerglass.com, Santee, CA	2	170	170	●
31	45	<b>Alexander Metals Inc.</b> alexandermetalsinc.com, Nashville, TN	1	93	93	●
32	40	<b>Dynamic Glass</b> dynamicglass.com, Houston	3	165	165	



CURRENT RANK ▼	PREVIOUS RANK ▼	COMPANY ▼	U.S. LOCATIONS ▼	FULL-TIME EMPLOYEES ▼	TOTAL EMPLOYEES ▼	OWNERSHIP ▼
\$20-30 MILLION ▼						
33	26	<b>Ajay Glass Co.</b> <i>ajayglass.com, Canandaigua, NY</i>	2	120	150	●
34	31	<b>Crawford-Tracey Corp.</b> <i>crawfordtracey.com, Deerfield Beach, FL</i>	2	109	109	●
35	42	<b>Anderson Aluminum</b> <i>andersoncompanies.com, Columbus, OH</i>	1	110	150	●○
36		<b>Zephyr Aluminum LLC</b> <i>zephyraluminum.com, Lancaster, PA</i>	3	80	80	
37		<b>JPI Glass</b> <i>jpiglass.com, Kansas City, MO</i>	1	104	104	●
38		<b>Koch Corp. (Strong Tower Construction)</b> <i>kochcorporation.com, Louisville, KY</i>	1	47	88	●
39	41	<b>Sunset Glazing</b> <i>sunsetglazing.com, La Mesa, CA</i>	1	7	65	
40	39	<b>National Enclosure Co.</b> <i>nationalenclosure.com, Ypsilanti, MI</i>	3	29	60	
41/42	43	<b>Vision Enclosure Walls Inc.</b> <i>vewus.com, Dallas</i>	3	135	135	
41/42		<b>SPS Corp.</b> <i>spscorporation.com, Apex, NC</i>	2	85	85	●
43		<b>Tepcoglass LLC</b> <i>tepcoglass.com, Dallas</i>	4	150	190	●
44		<b>Specified Systems Inc.</b> <i>specifiedsystems.com, Canonsburg, PA</i>	1	37	85	●
45	50	<b>R&amp;R Window Contractors Inc.</b> <i>rrwindow.com, Easthampton, MA</i>	1	74	76	●
46		<b>Wind Ready</b> <i>windready.com, Miami</i>	1	80	80	
47		<b>Momentum Glass</b> <i>momentum-glass.com, Spring, TX</i>	2	115	115	
48	46	<b>Synergi LLC</b> <i>synergillc.com, Hanover, MD</i>	2	53	56	●
49/50		<b>AFI Glass &amp; Architectural Metal Inc.</b> <i>afiglass.com, Poughkeepsie, NY</i>	1	40	65	●○
49/50		<b>Mass Merchandising</b> <i>masmerch.com, Bohemia, NY</i>	1	40	50	●

## TOP GLAZIER PARTNERS, CONT'D

**Glass Masters***glassmasters.biz**Ketchum, ID*

"Owner Steen Sorensen has created a niche market specializing in high-end second homes in the Sun Valley, Idaho, market. His ability to include heavy low-iron glass and unique features make Glass Masters stand out." — TBM Inc., tbmglass.com

**Glass Solutions***gsichicago.com**Chicago*

"Glass Solutions, Chicago, is exceptional. They excel and specialize in high-end interior glass installation. We've worked with them over many years and appreciate the quality of their work and their ability to meet our tight deadlines." — Skyline Design, skydesign.com

**Honorable Mentions****MY SHOWER DOOR***myshowerdoor.com*

nominated by D3 Glass LLC, d3glass.com

**PERMASTEELISA NORTH AMERICA***permasteelisagroup.com*

nominated by Dundy Glass & Mirror Corp., dundyglass.com

**ADVANCED GLAZING CONTRACTORS**

*advancedglazingcontractors.com*, nominated by Glenly Glass Co., glennyglass.com