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AMERICA



6TH
CONSECUTIVE
YEAR OF
GROWTH FOR
TOP 50
GLAZIERS

BUILDING UP



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TOP FIFTY

2018 ANNUAL REPORT

GLAZIERS

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The U.S. Glazing Industry,
by the Numbers

MOVING UP

Top 50 Glaziers climb the charts, expanding and investing as the market continues to grow

BY NORAH DICK

16. GAMMA NORTH AMERICA INC.

MGM National Harbor,
Oxon Hill, Maryland



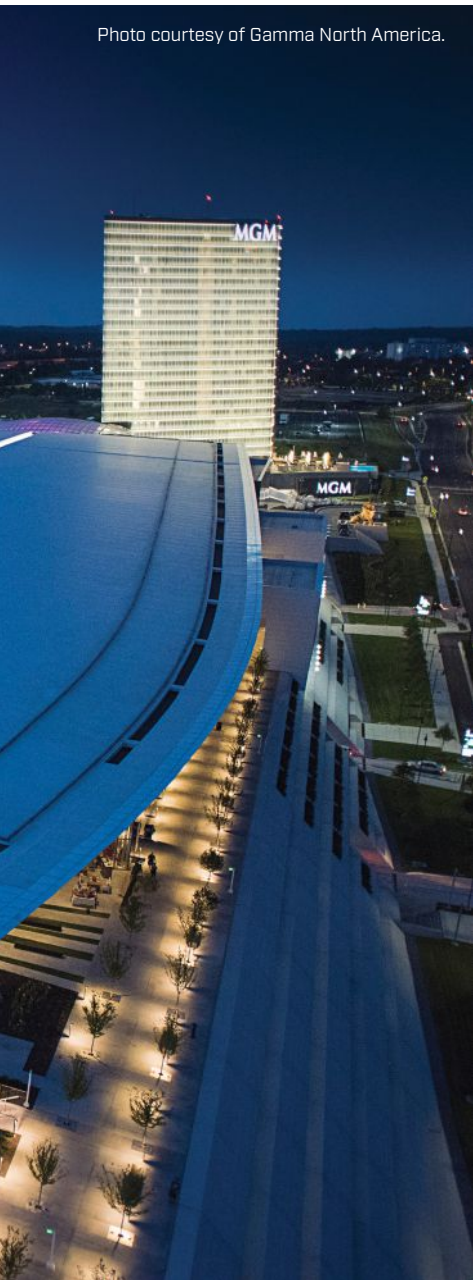
Online: Visit GlassMagazine.com/June2018 to learn more about the projects highlighted in this report and about other notable projects from Top 50 companies.

U.S. contract glaziers boasted another year of impressive growth in 2017, based on the 2018 Top 50 Glaziers Annual Report, Glass Magazine's annual survey of the nation's 50 largest glazing firms according to gross sales. Sixty-seven percent of companies reported year-over-year sales gains. Combined gross sales for

all Top 50 firms reached an estimated \$4.3 billion in 2017, an almost 15 percent year-over-year increase from 2016, according to the long-running survey, which is now in its 26th year. It is the sixth consecutive year of growth in the market, which bottomed out in 2011 during the Great Recession.

Given this upward trajectory, numerous Top 50 companies looked to invest and expand in 2017, taking the long

Photo courtesy of Gamma North America.



view by reinvesting in their businesses. Equipment purchases focused on glass handling and transportation solutions, as well as fabrication equipment and CNC machinery, according to survey respondents.

“We have acquired additional lifts and manipulators to increase efficiency in the field,” says John Cashel, president, Above All Storefronts, aboveallstorefronts.com. “We also recently purchased

a 3-D scanner to allow for quicker, more accurate field measurements.”

Additionally, several companies expanded or refurbished facilities. “2017 was a year of growth but also a year where we made a lot of process improvements and reorganized our entire shop,” says Robert Anderson, director of operations, Anderson Aluminum, andersoncompanies.com. “Making those improvements, while also managing

Photo by Seth Parker, Parker Studios, sethparker.net



13. KOVACH BUILDING ENCLOSURES

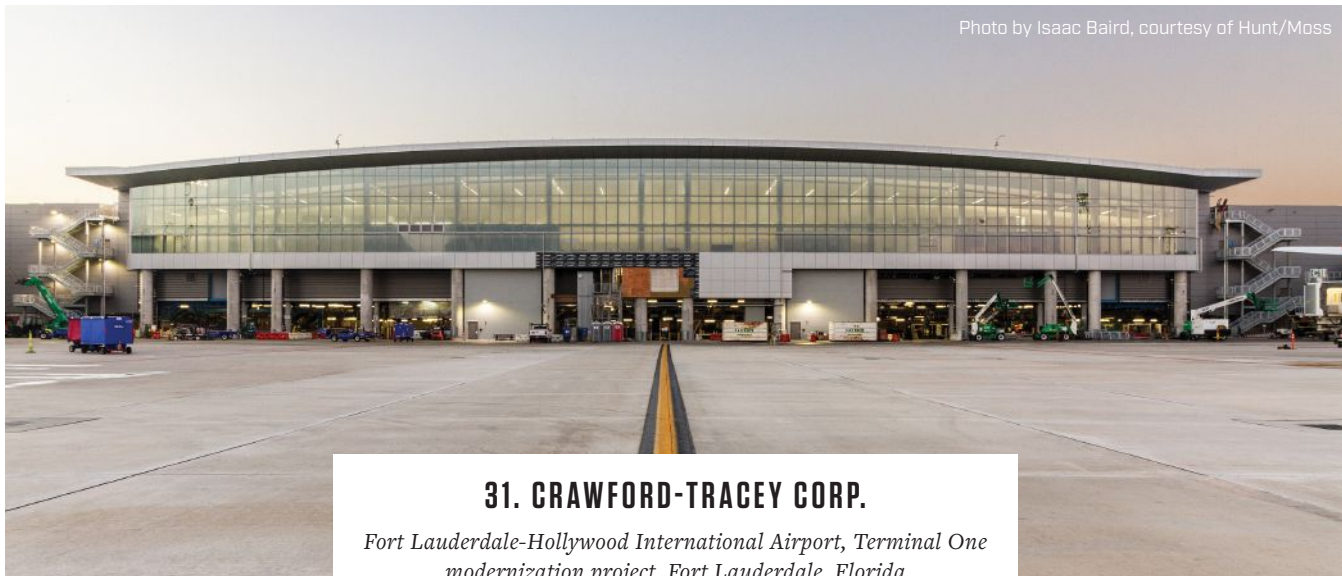
*222 2nd Avenue,
Nashville, Tennessee*

the company’s growth, was a serious challenge, but in the end, we overcame those challenges and are set up much better for success in the years to come.”

Glazing firms’ purchases and expansions represent growth, but also growing pains, as increased activity put a strain on an industry that still lists a lack of skilled labor as its number one obstacle, according to respondents. “Especially during this period of tremendous growth in our industry, one of our primary challenges has been to hire experienced, seasoned project managers, estimators and union-qualified glaziers,” says Barbara Kotsos, director of marketing, Giroux Glass Inc., girouxglass.com. “It’s so important to us that we achieve the same quality of work and craftsmanship, no matter how we are stretched with new challenges and opportunities.”

Kevin LaPoint, vice president, commercial glass and entrance divisions, H.J. Martin and Son, hjmartin.com, echoes the challenges of troubleshoot-

Photo by Isaac Baird, courtesy of Hunt/Moss



31. CRAWFORD-TRACEY CORP.

Fort Lauderdale-Hollywood International Airport, Terminal One modernization project, Fort Lauderdale, Florida

Six new companies joined the Top 50 Glaziers List in 2017.

No. 10 Elicc Americas Corp., Escondido, California, eliccgroup.com

No. 12 Reflection Window + Wall LLC, Chicago, reflectionwindow.com

No. 20 Integro Building Systems, Maple, Ontario, Canada, integrobuilt.com

No. 22 RynoClad Technologies Inc., Ontario, California, rynoclad.com

No. 37/38 Lafayette Metal and Glass Co., Lake Success, New York, imgny.com

No. 42 Anderson Aluminum, Columbus, Ohio, andersoncompanies.com

ing a lack of labor. “We continue to challenge ourselves to increase field productivity with the skilled labor we currently have,” says LaPoint. “One way we have done that is through utilization of a large pre-fabrication team to assemble aluminum frames, making our glaziers more productive on site.”

Companies also cited difficult project schedules as a major concern, an issue which can also be connected to a lack of labor. Roger T. Kramer, CFO, Pioneer Cladding & Glazing Systems LLC, pioneerglazing.com, said that the labor shortage “pushed and strained” project schedules this last year as the industry

Six companies opened new locations or expanded existing facilities.

No. 4 Harmon Inc., harmoninc.com, opened a new location in New York City.

No. 13 Kovach Building Enclosures, kovach.net, opened a new location in Austin, Texas.

No. 18 Pioneer Cladding & Glazing Systems LLC, pioneerglazing.com, purchased a 48,000-square-foot facility located in Cleveland.

No. 27 Admiral Glass Co., admiralglass.net, opened a branch office in Austin, Texas, which now employs 50 employees.

struggles with management of projects.

Escalating costs are also a concern, according to a couple of Top 50 respondents. Kramer pointed to the issue of material costs in the strengthening economy, saying that prices have “continued to escalate with the market recovery, and have more recently been negatively impacted by the administration’s new tariffs on aluminum and steel.”

The following Top 50 Glaziers report presents a detailed snapshot of the U.S. contract glazing market. The annual report is intended to measure the health of the U.S. glazing market, by documenting changes in sales, bid levels,

No. 36 Kensington Glass Arts, kensingtonglass.com, opened a new location in Baltimore with 10 employees.

No. 39 National Enclosure Co., nationalenclosure.com, opened a New England-based operation in Boston.

One company closed locations in 2017.

No. 9 Binswanger Glass, binswanger-glass.com, closed two locations: one in Metairie, Louisiana, and another in Bristol, Connecticut.

profit margins and more. It looks at the level of activity in various building segments and geographic regions. And, it tracks trends and identifies leading obstacles facing companies. For complete market statistics, see pages 48-51. For a list of Top 50 companies serving the United States, organized according to sales volume, see pages 30-43. View notable projects from Top 50 companies throughout the feature.

For the first time, this year’s report also recognizes exceptional glazing contractors, nominated by their fabricator partners for excellence in the field. This list can be found on page 44.

THE LIST

THE ANNUAL TOP 50 GLAZIERS list 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 then ranked within each sales category.

Information from 47 of the Top 50 listed companies was reported directly to Glass Magazine from our Top 50 survey submissions, completed by each company, 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.

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.



01

\$600+
MILLION

Permasteelisa North America*

permasteelisagroup.com
Windsor, CT

Previous rank: 1
U.S. locations: Seven
*rank based on sales
estimate, from parent Lixil
Group Corp.'s FYE2017
Financial Results Summary.

02

\$400-500
MILLION

Enclos Corp.

enclos.com
Eagan, MN

Previous rank: 2
U.S. locations: 15
Full-time employees: 631
Total employees: 634

03

\$200-300
MILLION

Benson Industries

bensonglobal.com
Portland, OR

Previous rank: 4
U.S. locations: 7
Full-time employees: 725
Total employees: 725

04

Harmon Inc.

harmoninc.com
Bloomington, MN

Previous rank: 3
U.S. locations: 16
Full-time employees: 558
Total employees: 561



48. H.J. MARTIN AND SON

*Mulva Family Fitness and Sports Center at St.
Norbert College, De Pere, Wisconsin*

05

Walters & Wolf*

waltersandwolf.com
Fremont, CA

Previous rank: 5
U.S. locations: Seven
Full-time employees: 700
Total employees: 700
*rank based on sales estimate

06

W&W Glass LLC

wwglass.com
Nanuet, NY

Previous rank: 6
U.S. locations: One
Full-time employees: 200
Total employees: 200

\$100-200
MILLION

07

Crown Corr Inc.

crowncorr.com
Gary, IN

U.S. locations: Four
Full-time employees: 300
Total employees: 300

08

GM&P Consulting and Glazing Contractors Inc.

gmpglazing.com
Miami

Previous rank: 7
U.S. locations: Two
Full-time employees: 91
Total employees: 91

09

Binswanger Glass

binswangerglass.com
Memphis, TN

Previous rank: 9
U.S. locations: 61
Full-time employees: 892
Total employees: 917

10

Elicc Americas Corp.*

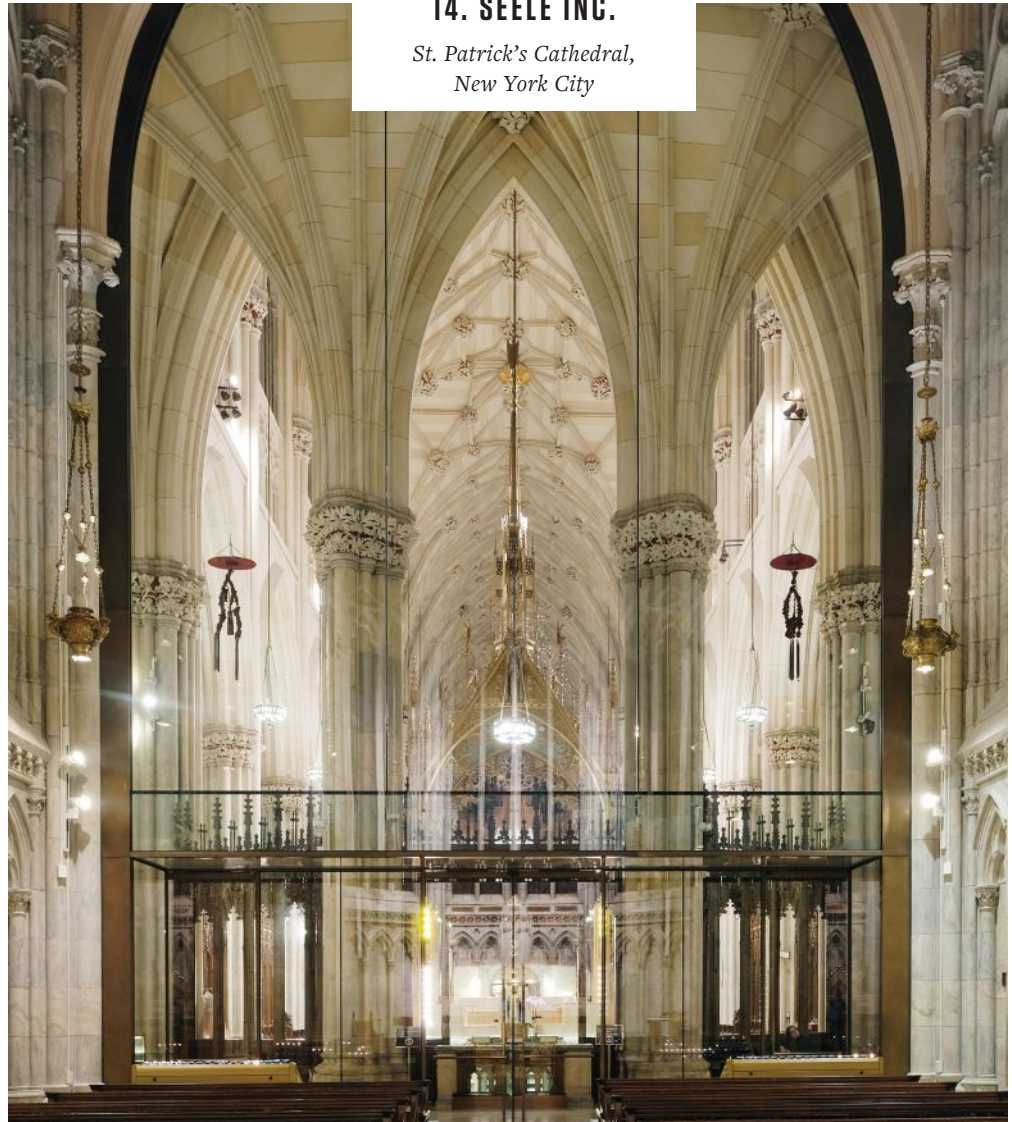
eliccgroup.com
Escondido, CA

U.S. locations: Two
Full-time employees: 73
Total employees: 73

*Elicc Americas Corp. is a new company on Glass Magazine's Top 50 Glaziers list. The company shares members of its leadership with Jangho Curtain Wall Americas Co.; however, Elicc officials state the company is not officially affiliated with Jangho Curtain Wall.

14. SEELE INC.

*St. Patrick's Cathedral,
New York City*



11

**Architectural
Glass & Aluminum**

aga-ca.com
Livermore, CA

Previous rank: 8
U.S. locations: Three
Full-time employees: 115
Total employees: 200

12

**Reflection Window
+ Wall LLC**

reflectionwindow.com
Chicago

U.S. locations: Five
Full-time employees: 152
Total employees: 152

13

\$50-100
MILLION

Kovach Building Enclosures

kovach.net
Chandler, AZ

Previous rank: 15
U.S. locations: Six
Full-time employees: 528
Total employees: 528

14

seele Inc.

seele.com
New York, NY

Previous rank: 11
U.S. locations: One
Full-time employees: 52
Total employees: 56

15

Alliance Glazing Technologies*

allianceglazing.com
Romeoville, IL

Previous rank: 12
U.S. locations: Three
Full-time employees: 250
Total employees: 250
**rank based on sales estimate*

16

Gamma North America Inc.

gammana.com
Concord, Ontario, Canada

U.S. locations: Three
Full-time employees: 503
Total employees: 503



17. KARAS & KARAS GLASS CO.

50-60 Binney Street, Cambridge, Massachusetts

17

Karas & Karas Glass Co.

karasglass.com
Boston

Previous rank: 10
U.S. locations: Two
Full-time employees: 90
Total employees: 147

18

Pioneer Cladding & Glazing Systems LLC

pioneerglazing.com
Mason, OH

U.S. locations: Five
Full-time employees: 322
Total employees: 380

19

TSI Corp.

tsicorporations.com
Upper Marlboro, MD

Previous rank: 16
U.S. locations: One
Full-time employees: 220
Total employees: 220

20

Integro Building Systems

Integrobuid.com
Maple, Ontario, Canada

U.S. locations: Three
Full-time employees: 120
Total employees: 140

21

Massey's Plate Glass & Aluminum Inc.

masseyglass.com
Branford, CT

Previous rank: 13
U.S. locations: Three
Full-time employees: 150
Total employees: 200

22

RynoClad Technologies Inc.

rynoclad.com
Ontario, CA

U.S. locations: Two
Full-time employees: 65
Total employees: 100

23

Ventana DBS LLC

ventana.vc
Chicago

Previous rank: 14
U.S. locations: Three
Full-time employees: 30
Total employees: 31

24

Giroux Glass Inc.

girouxglass.com
Los Angeles

Previous rank: 19
U.S. locations: Four
Full-time employees: 178
Total employees: 184

25

\$40-50
MILLION**Haley-Greer Inc.**

haleygreer.com
Dallas

Previous rank: 17
U.S. locations: Two
Full-time employees: 150
Total employees: 150

26

Ajay Glass Co.

ajayglass.com
Canandaigua, NY

Previous rank: 20
U.S. locations: Two
Full-time employees: 130
Total employees: 200

**21. MASSEY'S PLATE GLASS & ALUMINUM INC.**

*University of Connecticut Engineering and Science
Building, Storrs, Connecticut*

27

Admiral Glass Co.

admiralglass.net
Houston

Previous rank: 18
U.S. locations: Three
Full-time employees: 300
Total employees: 300

28

Tower Glass Inc.

towerglass.com
Santee, CA

Previous rank: 21
U.S. locations: Two
Full-time employees: 180
Total employees: 180



29. ABOVE ALL STORE FRONTS INC.

Suffolk County Community College – Learning Resource Center, Brentwood, New York

29

Above All Store Fronts

aboveallstorefronts.com
Hauppauge, NY

Previous rank: 23
U.S. locations: One
Full-time employees: 190
Total employees: 190

30

Architectural Wall Systems LLC

archwall.com
Clive, IA

Previous rank: 24
U.S. locations: Two
Full-time employees: 77
Total employees: 77

31

Crawford-Tracey Corp.

crawfordtracey.com
Deerfield Beach, FL

Previous rank: 26
U.S. locations: Two
Full-time employees: 130
Total employees: 130

32

\$30-40
MILLION

Egan Co./InterClad

eganco.com
Brooklyn Park, MN

Previous rank: 38
U.S. locations: Four
Full-time employees: 100
Total employees: 100

33

Glass Solutions Inc.

gsichicago.com
Itasca, IL

Previous rank: 22
U.S. locations: One
Full-time employees: 50
Total employees: 100

34

Cherry Hill Glass Co.

cherryhillglass.com
Branford, CT

Previous rank: 25
U.S. locations: One
Full-time employees: 100
Total employees: 110

35

Progress Glass Co.

progressglass.com
San Francisco

Previous rank: 34
U.S. locations: Two
Full-time employees: 110
Total employees: 110

36

Kensington Glass Arts

kensingtonglass.com
ljamsville, MD

Previous rank: 28
U.S. locations: Three
Full-time employees: 160
Total employees: 160

37/38

David Shuldiner Inc.

davidshuldiner.com
Brooklyn, NY

U.S. locations: One
Full-time employees: 30
Total employees: 65

37/38

Lafayette Metal and Glass Co.

lmgny.com
Lake Success, NY

U.S. locations: Two
Full-time employees: 75
Total employees: 119

36. KENSINGTON GLASS ARTS

Confidential foundation, Baltimore





42. ANDERSON ALUMINUM

Parks Edge, Columbus, Ohio

39

\$20-30
MILLION

40

41

42

National Enclosure Co. LLC

nationalenclosure.com
Ypsilanti, MI

Previous rank: 33
U.S. locations: Three
Full-time employees: 27
Total employees: 60

Dynamic Glass

dynamicglass.com
Houston

Previous rank: 29
U.S. locations: Two
Full-time employees: 140
Total employees: 140

Sunset Glazing

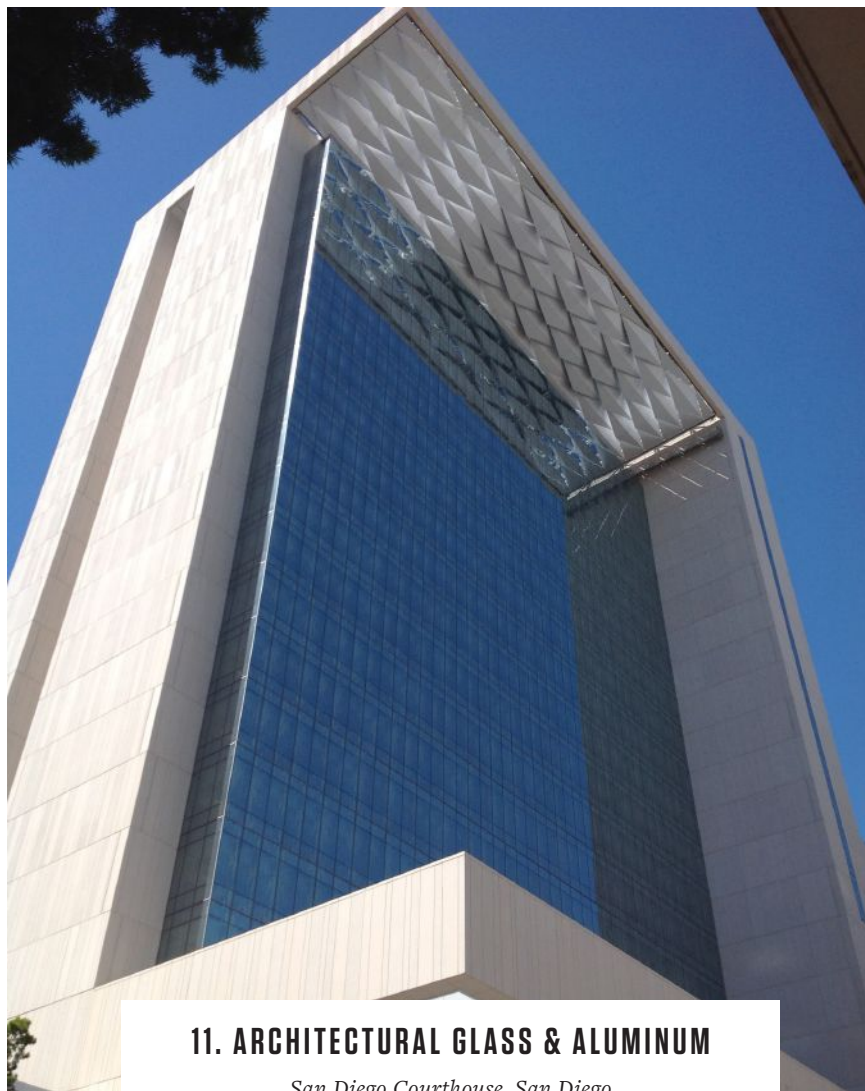
sunsetglazing.com
La Mesa, CA

U.S. locations: One
Full-time employees: 90
Total employees: 90

Anderson Aluminum

andersoncompanies.com
Columbus, OH

U.S. locations: One
Full-time employees: 100
Total employees: 150



11. ARCHITECTURAL GLASS & ALUMINUM

San Diego Courthouse, San Diego



43

Vision Enclosure Walls Inc.

viewus.com
Dallas

U.S. locations: One
Full-time employees: 20
Total employees: 120

44

AHC Glass

ahcglassinc.com
Hayward, CA

Previous rank: 40
U.S. locations: One
Full-time employees: 66
Total employees: 82

45

Alexander Metals Inc.

alexandermetalsinc.com
Nashville, TN

U.S. locations: One
Full-time employees: 75
Total employees: 75

46

Synergi LLC

synergillc.com
Hanover, MD

Previous rank: 39
U.S. locations: Two
Full-time employees: 40
Total employees: 40



46. SYNERGI

Beverly Center, Los Angeles

47

Metropolitan Glass Inc.

metroglass.com
Denver

Previous rank: 30
U.S. locations: One
Full-time employees: 85
Total employees: 85

48

H.J. Martin and Son

hjmartin.com
Green Bay, WI

Previous rank: 35
U.S. locations: Two
Full-time employees: 931
[71 employees in glass and
glazing]
Total employees: 931 [71
employees in glass and
glazing]

49

Pacific Glazing Contractors

pacificglazing.com
Morgan Hill, CA

Previous rank: 31/32
U.S. locations: Two
Full-time employees: 105
Total employees: 108

50

R&R Window Contractors Inc.

rrwindow.com
Easthampton, MA

Previous rank: 31/32
U.S. locations: One
Full-time employees: 78
Total employees: 80