Glazing Notes

March & June, 2011

A newsletter for professional glazing contractors, published by RJL Associates Inc.

What to expect:

- More caution on projects being released
- Government spending is restrained and more focused
- Tough line on credit terms and account limits still apply
- Firming in some commercial segments is slow, multi-unit residential still weak, and health care is moderately strong
- Vendor consolidation to continue, with stronger firms upping their support structure in the coming months

Inside this issue:

So is this late or early . . .

The best laid plans of man and mice sometimes are influenced by schedules versus the calendar.

That being said, the March edition was partially done when the heavy schedule came into play and set everything back. With May looming, the thought was to send out the edition, even though late, then more developments caused one to pause and ponder. Why not just combine and update all at once, so here we are!

That being said, let's move forward on the various tidbits and information of interest and importance.

New Developments in the Market and Industry

The 2011 Florida Legislature has ended with some issues affecting the construction industry passed and either signed or waiting for Governor Scott's as this goes to press.

Of major interest are the change of the Glazing Contractors license from voluntary to mandatory, along with some changes to the Florida Building Commission as far as mandates and location within the regulatory frame work, as it moves from the Department of Community Affairs to a new "home".

The new mandatory licensing will have some immediate impacts, as it is scheduled to take effect July 1st, as this will require all glazing firms to be licensed and not just pay an occupational or business tax. You can expect some leeway in enforcement, but look to those counties and cities that did require some form of testing to switch to using the State Licensing as a mandatory, and also for other jurisdictions to demand this for the business tax.

In some jurisdictions a separate permit is required for window, storefront and related installations, and it would not surprise many if this was now adopted as a trend in other jurisdictions for the simple reason that it makes perfect sense to mandate the inspection due to the critical nature of the exterior envelope of a building.

As with other specialty licensing, the general contractor license will not qualify a GC to pull this type of permit, if required, so it will have an effect if this does spread to other jurisdictions.

How this will be received and the time frame enforcement locally will be a function of education, and this takes time.

On another vein of interest, the 2010 Florida Building Code is muddling through the hurdles of getting final approval and release for printing, and time is running short, as the deadline for the effective date is looming ever closer.

By statute, the new Code must take effect on December 31, 2011, and the Florida Building Commission cannot change this, as the legislature sets it.

There are a few changes that affect the glazing profession, including improved energy performance requirements and updating of select reference standards.

Among the energy performance effects would be increased use of thermal break framing and window systems, as well as high performance IGU units.

You can expect to see improved systems being more strongly marketed in Florida beginning in early 2012 as manufacturers educate designers on the new Code requirements.

New Developments by Vetrotech Saint-Gobain

The new 2010 Florida Building Code is now in its final stages of approval, with the early June meeting to authorize the printing of the edition. The scheduled effective date of this edition will be December 31, 2011 at the latest based on statutory requirements which the Commission cannot extend on its own authority.

In our last issue we had written about several introductions, and let's expand and add to a few select items.

The Keralite FR-Ultra is a very flexible product that can be used on applications ranging from 45 to 90 minute rated with the capability to be used on temperature rise applications. With a thickness of 3/4", the product is thinner than our intumescent 60 and 90 minute products, gives you a good clear view, along with sound reduction (STC rating) and an insulating value.

In addition one of the options also allows use in hurricane impact rated door and frame applications in ratings from 45 to 90 minutes.

One of the common questions on exterior applications is how can the low-E be coordinated with other exterior glazing.

The simple answer is that it can be coordinated, and what is needed is the information from the glazier as to what is being used.

Another common question regards cost, and typically this product is less expensive than laminated ceramic and most intumescent products. The difference depends on the rating and sizing. The Keralite FR-Ultra has a maximum sizing of 46" x 78", so it will not be a possible alternate to all applications.

In addition, there was mention of the Forster Curtain Wall system being fabricated by VSGNA (Vetrotech Saint-Gobain North America), and this is available for immediate use in most areas with FBC product approval expected by end of 2011 for non-HVHZ areas, and for HVHZ areas the first quarter of 2012.

This is a steel based system with snap covers available in aluminum, galvanized steel and stainless steel, with a system option to all stainless steel.

The system is fabricated with required anchors, PE sealed calculations, rated glazing and with a number of factory painted finish options.

As is the custom with these system, assembled ladders and pre-punched sections are shipped for field assembly and installation.

Available in one and two hour rated systems, matching doors are available within the system.

The VDS system, for punched openings, is available for use in interior and exterior applications ranging from one to three hours, with doors available in sixty and ninety minute ratings.

The exterior version is also currently undergoing additional testing for FBC product approvals for both non-HVHZ and HVHZ applications.

VDS systems are fully fabricated and shipped as final assemblies except for applications in very large sizing or where the installation dictates a modular approach. Factory painted and supplied with the proper rated glazing, these are solutions requiring credible systems that meet your needs with consistent quality and competitive pricing.

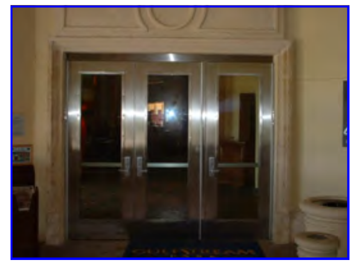
Aluflam Update

As we had mentioned previously, Aluflam has on its schedule several R&D projects with the aim to improve the product offerings in certain areas.

One project completed in mid-May was a test at UL facility in Northbrook, IL, to expand the maximum glass area for its storefront sixty minute system and also the listing allowing the ability to go to larger width panels. The completed tested updates the listing and is in effect immediately for current and new projects, and it will be reflected on the company's website in the next few weeks.

Other R&D projects are in the works which include the ninety minute door for the two hour aluminum curtain wall system, which is available for interior and exterior use. Another project on the schedule is for testing the systems for FBC product approval, which is projected to occur in 2012.

Aluflam is the only manufacturer to offer a UL listed all aluminum fire rated system with framing and doors in the one and two hour categories. Other manufacturers claim "aluminum" systems which are clad only over steel.



The above shows ninety minute, stainless steel clad full vision panel exterior doors by Vetrotech Saint-Gobain

Q & A Corner

I have had requests for different warranty types and lengths. Is there a "standard" or norm for the industry as it applies to fire rated glazing and systems?

There is no set norm and a designer and/or owner can ask for whatever they want, but each manufacturer sets their own which may not match the requested warranty as far as length and terms.

As a general guide, most warranties cover replacement material only. For glass products, monolithic items such as super tempered (*Pyroswiss)* and ceramic (*Keralite FR-R)* carry no extended warranty only that against inherent defects in the product.

For filmed ceramic products (*Keralite FR-F)* the standard warranty term is three years which covers the applied film for defects in what is considered a normal period for defects to expose themselves.

For laminated products (*Keralite FR-L, Keralite Fr-Ultra, Swissflam and Contraflam)* the typical warranty term is five years covering defects in the laminating process.

As far as systems (framing and doors) this varies for the base material, finish and hardware. This can vary from two to five years typically except for premium paint finish options, if available.

Be aware that certain firms that are wholesalers or fabricators for manufacturers may offer their own warranty which may differ in length, term and conditions. The issue with these are that it is not the **Manufacturer's Warranty**, which is what typically is required.

Are there major changes for fire rated glazing under the new 2010 Florida Building Code?

The 2010 Florida Building Code is based on the 2009 International Building Code, and there are a few small changes as far as updates in the new edition.

There were, and are now in effect, some changes in the labeling protocol, as well as expansion on the use of elevators, this time as dedicated means of egress during fires. This will require protection of the elevator foyer areas.

The more the market mix and technology changes, the more it all seems to be down to the same basics. Make sure you get it right the first time, be competitive, and make a profit.

Sometimes one feels like they are just hanging on, and in this market it may be a very common feeling. Yet there are changes in the wind.

And there is more to come

As we see the developments in the licensing scheme by the State of Florida, we are also seeing changes in the number and types of firms that are weathering the change in the market the last 3 years.

This change has changed the character of the bidders in the market, as well as the scope of what is being bid and by whom.

One of the major observations, besides the number of firms shrinking and some marginal firms leaving the market, is that firms who are currently surviving will have to take additional steps to deal with the changes and evolution needed to remain as a responsive firm, and one that will have the opportunity to grow.

There will still be a mix of types and size of firms, but the commercial firms will be divided as to who will have the capacity to deal with the total scope of the work versus those that are pure niche players.

The number of firms who can offer this service will be limited due to the staff requirements, and further by capacity issues as the various needs will require firms to limit the type and size of projects being secured.

For example as you evolve over the short term firms will find themselves having to offer a complete service package. This will include the exterior shell glazing, which will include not only the fixed and operable areas, but also analysis and comparisons as to which choices will offer the best value for the initial and operating costs over the projected building life, as well as conformance to the Energy Code and Green Code.

As these will be Code mandates, the importance of being current will magnify the involvement of the glazing firm.

Adding to the exterior demands will be changes and focus on the interior package. The firms will be including this as part of their offering as the evolution of the firms will see the minimizing of firms that specialize only of interior finishing packages as far as glazing.

This will also see glazing firms more involved in additional services such as door and hardware packages to eliminate issues in coordination.

Key here will be adding industry contacts to offer the expertise and services to cover the added analysis and sources, as well as advanced budgeting, systems and support.

As the Vendor Line up Changes or Evolves?

Over the past few months we have seen a number of changes as to vendors either being bought out, shedding certain business units, being reorganized, or being liquidated.

Currently United Glass Corporation was bought by the holding company which owns Arch Aluminum, while the same firm is in the running to purchase Vitro America, which is currently in Chapter 11 due to the bankruptcy filing in Mexico of the parent firm.

In addition International Aluminum, the holding firm owning US Aluminum has filed for Chapter 7 liquidation, eliminating this supplier from the market.

We are also seeing reorganizations by several firm including Guardian, Viracon, and Old Castle, among others.

What does this bode, and what are the immediate effects?

Consolidation; more leverage on pricing stability and increases. Stay tune!

Of Changes and Developments

In a previous story we had commented on some of the changes in the market from an overall view point. As this newsletter is slanted to the fire rated glazing market, what are some of the changes that are pertinent to this segment, and affect customers.

TGP has been a great marketing firm and they have introduced their HD ceramic product as a response to the "clear" trend in this part of the product offerings. This response to the Schott Pyran Platinum introduction offers a change, but there are differences in the visible light as well as tint reflectance. Will this answer the market push towards a clearer product?

In addition TGP has been making some modifications to their system offerings with a tweaking of profiles as well as pricing. In addition they have been answering a push on the exterior segment of the fire rated market via their basic and curtain wall offerings.

Schott's big move in the offering of the Pyran Platinum, which has been moving along slowly. The distribution chain seems to have been arranged with GGI, SAFTI First and Glassopolis being distributors along with Interedge, an AGC owned subsidiary. Remember that NSG owns Schott, Pilkington, AGC, Interedge as well as Glabervel.

Interedge has been trying to muscle into the systems side with some fine tuning of a souped up HM offering to fit a small niche area.

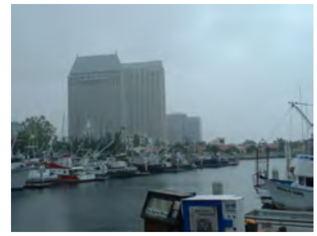
SAFTI First has been making some noise with systems they claim can be used for exterior applications requiring hurricane impact ratings, as well as for curtain wall applications. Unfortunately on the former, no evidence of approval for this type of use can be found on either the Florida Building Commission or Miami-Dade websites, and a single UL reference is for an obsolete category not recognized for this qualification.

In addition there has been a move to get their SuperLite I-XL considered for use in 45 and 60 minute applications, but their UL listing for the product explicitly limits them to 20 minute rated applications.

Their push in the ceramic market has been focused on pushing the Schott Pyran Platinum and their distributor agreement mandates that the product cannot be private labeled so that they have to use the Schott name, with mixed results.

Kawneer entered into an agreement with Forster Group to market their steel curtain wall systems for both conventional and fire rated applications, thus giving them a complete exterior offering. Forster also entered into an agreement with Vetrotech Saint-Gobain (VSGNA) to stock and fabricate their curtain wall system, and also to supply their Contraflam laminated intumescent glass products as part of the curtain wall systems.

VSGNA has expanded their VDS system with the addition of the Forster Curtain Wall fire rated systems, along with improvements in the ceramic products.



You have to appreciate the work you do and the idea of being the best. Along with that you also have to remember that you also need to rest and take a break, in order to maintain your focus and remain sharp. Vacations are a means to rest, open your mind to new perspectives and ideas, and come back recharged.

Vacation Notice

This year our vacation will be a combination affair as we will be closing on Wednesday, July 27th and be back on Monday, August 15th. During this 2 1/2 week period we will be accessible via fax and e-mail, with limited access to voice mail as we will be traveling overseas with a large time frame differential. We will be checking in for any immediate questions and requests, and will answer as soon as practical. We appreciate your business and will make sure you are serviced during our break.

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Manufacturers' Representatives

Representing:

Aluflam North America

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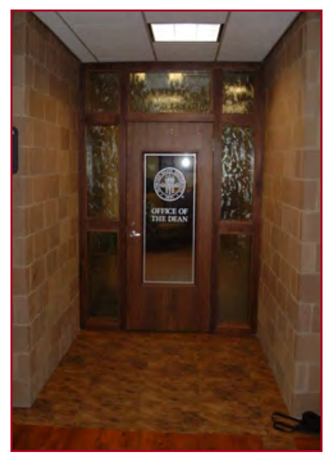
Calendar and Notes

June 12th - 14th	Participating in the BOAF Annual Conference - Naples, FL
July 4th	Closed for Independence Day Holiday
July 27th - August 14th	Closed for vacation
September 5th	Closed for Labor Day Holiday
September 12th - 14th	Glass Build Show - Atlanta, GA
October 26th - 28th	DHI Annual Conference - Washington, DC
December 31st	Effective date for 2010 Florida Building Code (?) or earlier

If you wish to be added or removed from the newsletter distribution list, please contact us and supply us with your firm name and information. For any questions or comments, please contact us. We may use your question on a future issue, and we will answer your inquiry privately.

You can forward information, including take-offs, specifications, details and related information to us for pricing, with a typical turn-around of one business day, in most cases. Our firm represents Vetrotech Saint-Gobain and Aluflam North America.



In this two hour wall application, a glazing unit combining fire and decorative glass was used in the transom and sidelights, along with custom trim on the frame. The wood door was fitted with vision light kit and clear glazing