

Glazing Executives Forum

NGA Glazing Executives Forum

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"I can attest that
the NGA's training, conferences,
and networking have had
a significant impact on my
professional advancement."

*-Thomas Hill, President and CEO
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State of the Industry The Market and Looking Forward

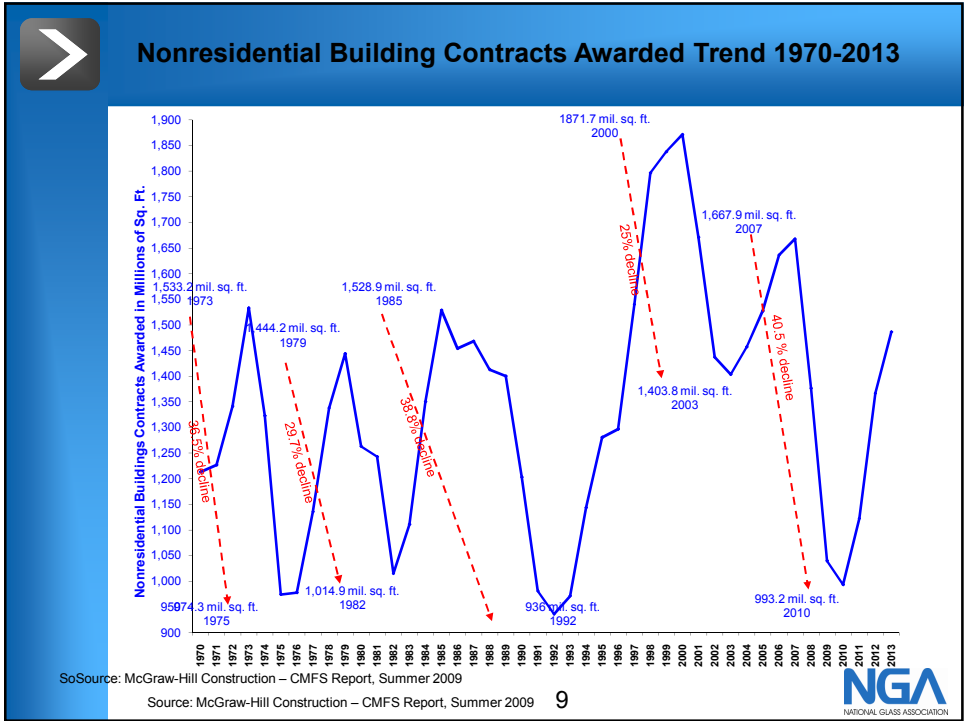
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Panelists

- Newton Little, ACE Glass
- Henry Taylor, Kawneer
- Rod Van Buskirk, Bacon & Van Buskirk





Nonresidential Building Construction Drivers

Retail / Store Construction Driver	2007	2008	2009	2010	2011
Retail Sales	3.3%	-0.7%	-6.2%	3.7%	4.9%
Residential Construction	-18.5%	-22.9%	-21.8%	2.7%	5.6%
Unemployment Rate	4.6%	5.8%	9.2%	10.1%	9.3%

Office Construction Driver	2007	2008	2009	2010	2011
Corporate Profits Before Taxes	-4.1%	-11.8%	-10.1%	7.8%	9.8%
Business Investment - Structures	14.9%	10.3%	-18.1%	-10.7%	-0.6%
Industrial Production	1.5%	-2.2%	-10.8%	1.3%	3.9%

Hotel Construction Driver
 With consumers and business travelers less inclined to travel and spend during an economic recession hotel construction will continue to decline through 2010.

Education Construction Driver
 State and local governments, the primary drivers of institutional construction, will be distressed by the tough financing environment and lower tax receipts.

Healthcare Construction Driver
 Diminished revenues due to a weak economy combined with higher borrowing costs and escalating healthcare costs will dampen healthcare construction.

Sources: McGraw-Hill Construction & Wachovia Economics Group



End of 2008 into 2009: The Perfect Storm

- Adjust Breakeven Point to lower market level
- Focus on Core Competencies
- Know and leverage Competitive Advantage
- “Cash is King” manage your cash flow
- Adjust your costs
- Form Strategic Partnerships with Key suppliers
- Protect your key customers



2009 to 2010: Navigating the Storm

Short Term:

- Keep your head!
- Take every opportunity to maximize profit
- Manage “Free Cash Flow”, implement cost controls
- Drive your Receivables
- Don't over quote and under follow-up: busy isn't profitable
- Evaluate Strengths & Weaknesses: Maximize Strengths





2009 to 2010: Navigating the Storm

Long Term: Position to be Stronger in the Recovery

- Technology
- Key Talent
- Evaluate your Facilities
- Evaluate Equipment Needs
- Expand your Market Opportunities



2011: Being Competitive in the Recovery

“..Leaders will emerge who win not by surviving the storm but by changing the game”. IBM

- All the Rules have Changed
- New Buying Behaviors
- Must have a Value Proposition
- No Second Chance on Deliveries, Get it Right the First Time
- Pursue What you can Get, Select your Bids

Recovery Strategy: People, Productivity, Clients, Growth, Competitive Advantage & Reputation





2009 to 2010: Navigating the Storm

Stronger in the Recovery

- It will get better, will you be better?
- Are your people, equipment and technology positioned to be the most competitive and efficient for growth?
- Maintain a competitive advantage that differentiates you from the competition and draws others to work with you.
- Always look for the competitive edge.
- Learn and be better prepared for the next storm.