



Glass and Glazing Federation

GGF Annual Report 2019

for the year ended 31st December 2018





Contents

01 President's Report	4
02 Managing Director's Summary	6
03 Technical Affairs	8
04 Marketing and Communications	10
05 Financial Report	12
06 GGF Board, Groups, Regions and Committees	14



01

President's Report



John Agnew
President

"Following a difficult transitional year, the GGF has ensured that the Federation maintains its position as the leading trade organisation in the industry"

2018 proved a difficult year for the industry with the continuing saga of the UK withdrawing from the European Union (Brexit) and all it entails, creating an uncertain trading environment.

In the period, there were reports of shortages in the supply chain and concerns over the increasing issue of skilled labour shortages in the industry. In addition, adverse weather at the start of 2018, caused a dip in the installation market as the conditions overhead and on the ground proved challenging for many companies in the sector.

Brexit, and in particular the potential consequences of a 'no deal' Brexit was (and at the time of writing, still is) a real concern for many companies. Although the full implications remain to be seen, from our research in 2018, the general market view was that, the home improvement sector remained relatively strong and stable, but the commercial glazing, manufacturing and processing sectors are experiencing a decline in order volume.

Throughout the shifting trading landscape, the GGF continued to engage with government, leading experts and like-minded construction trade bodies. Gathering as much relevant information as possible and cascading it to GGF Members, to help them adapt to legislative and policy changes remained a high priority.

Though many parts of the GGF and its five subsidiary companies (FENSA, BFRC, GGF, RISA and Borough IT) have proved a great success story over the last 20 years, the organisation conducted strategic reviews and realised that internal changes were required to maintain its position as the main trade organisation in the sector. In January 2018, a new commercial MD was recruited to pilot the commercial subsidiaries through a process of growth and diversification to deliver the best value for the GGF, its Members and customers.

In October 2018, the GGF launched a new training programme as part of its long term commitment to 'train the industry'. The GGF surveyed Members and in their response it was clear that there was an urgent need for training for installers and surveyors. The GGF developed courses for both areas and they are now available for Members.

The Federation also continued to build on its strong brand position and grow its audience through its digital platforms such as, its new trade website GGF.org.uk launched in July 2018 and via its award winning consumer advice website MyGlazing.com.

The GGF's brand profile continued to grow through the trade, consumer and mainstream media, increasing

awareness of the GGF throughout the industry, the wider construction sector and to homeowners. This ensured all connected to and engaging with the GGF were well informed on the Federation's work on technical issues, industry standards, legislative changes and consumer issues.

With a formidable library of technical information and wealth of expertise, the Federation continued to represent the industry across the UK and international standards committees, as well as in the political arena at local and national government levels.

Following a difficult transitional year, the GGF has maintained its position as the leading trade organisation in the industry. The GGF exists for its Members and as such, relies on an ongoing collaborative working relationship through our group and committee structure. This inclusive approach ensures that all companies regardless of size, position, sector and status continue to receive the support and high levels of service and benefits that GGF Members deserve.



02

Managing Director's Summary



Steve Rice
Managing Director

"The GGF is in its strongest ever position to help Members cope with the many challenges ahead for our industry"

Though 2018 was a challenging year due to the trading environment, it proved a progressive period for the Federation as we strengthened our position for the benefit of Members.

In the last 12 months, the performance of the GGF departments has been consistent with some outstanding achievements in terms of membership growth, technical influence, new product launches and an increased awareness of the GGF and its members across our key audiences.

2018 saw a record 67 companies joining the GGF, an increase of over 45% on 2017 when 46 new companies joined the Federation. The surge in membership growth clearly shows that more companies are looking for support as the industry faces what many have called the construction industry's "perfect storm" of shifting government policy, legislation changes and skilled labour shortages.

The continued uncertainty of Brexit and its potential outcomes, combined with the imminent changes to building regulations following the post-Grenfell Hackitt Report and the ever increasing problem of attracting skilled workers to our industry, are major issues that the GGF not only recognises, but has laid out plans to help companies cope with the changes ahead.

On the political front, the GGF has been extremely proactive in 2018 with the formation of the Political Strategy Committee and re-appointment of political advisory firm GK Strategy to help us drive our campaigns to Government.

These actions have sharpened our focus on key issues as we aim to increase; our political influence and our conveyance of Members concerns to policy makers and legislators on areas such as fire safety, energy efficiency, training, security and glazing in heritage buildings.

On the technical side, the Federation continued to have representation and input at the main meetings for British, European and International standards. The Technical team also participated in numerous meetings, seminars and events in the UK and abroad, imparting and gaining vital technical information. During the period we also revised and updated numerous technical publications and helped structure the new GGF training courses for installers and surveyors.

The momentum of our consumer facing activity continued in 2018. With more than 250k visits to MyGlazing.com (the GGF's homeowner advice website) and through our consumer PR activity our articles reached an audience in excess

of 70m. In addition, the GGF continued its work with the Chartered Trading Standards Institute and updated the GGF Consumer Code of Practice following the enactment of the General Data Protection Regulation (GDPR) in May 2018.

There is no doubt the unique support the GGF provides to consumer facing members is greater than it has ever been and this will continue with more plans in the pipeline to increase awareness of the GGF and its Members to homeowners.

It was also landmark year for the GGF's Health and Safety side as The Window Company (Contracts) Ltd, became the first ever GGF Member to attain Gold Level in the GLASS Charter Merit scheme which is designed to improve Health and Safety performance in all sectors by providing best practice guidelines, advice and incentive to improve the working environment.

In summary, the GGF is in its strongest ever position to help Members cope with the many challenges ahead for our industry. This strength is great testament to the companies that make up the GGF membership. My thanks go to all Members for their support to ensure the GGF continues as the leading trade body for the glass and glazing industry.



03

Technical Affairs

"Throughout 2018, the technical staff ensured that Members received the key information first, with updates at every specialist group and regional meeting"

With many changes ahead for all in the industry, it was only fitting that the GGF saw 2018 as a year of influence and preparation.

Firstly it was important for the Federation's technical experts to have their places at the key technical committees and at industry meetings to influence the revision of UK and international standards.

Conveying Members' concerns and furnishing these meetings with vital information proved essential to ensure the glass, glazing and fenestration sectors were fairly considered. As legislative and policy changes inevitably affect building regulations and industry standards, the GGF is now well placed to represent the industry.

The main area where the GGF focused its technical expertise in 2018, was fire safety. The Hackitt Report was published in April 2018, following the Government Inquiry into the Grenfell Tower fire tragedy.

From the Hackitt Report the main points included:

- The current regulatory system for ensuring fire safety in high-rise and complex buildings is 'not fit for purpose'
- The unfit for purpose system applies throughout the building life cycle
- The general culture of the construction industry and the effectiveness of regulators are believed to be strongly connected to the current system being unfit for purpose

Key reasons were highlighted for the regulatory system being unfit for purpose, were;

- Current Building Regulations and guidance are too complex and unclear
- Clarity of roles and responsibilities is poor
- Assessing and ensuring competency of key people throughout the system is inadequate
- Compliance, enforcement and sanctions are too weak – what is being built is not what was designed – poor control of changes to original design/specification – 'value engineering'
- Occupier routes to raise concerns are unclear and inadequate
- The system of product testing, marketing and quality assurance is ambiguous

From these findings in the Hackitt Report a full review of the building regulations was triggered and new guidance is continuously being shaped.

The Report also included the need to define the roles and responsibilities of those involved in safety for buildings. This stretches to the individual competence and accreditation of skilled workers through to the process of compliance and enforcement of building regulations.

Aligned to the Reports' findings was the quality assurance of products used in construction and their testing and certification.

The Hackitt Report has also given the industry the opportunity to bring other Building Regulations/guidance into consideration including:

- Fire resistance performance (Approved Document B)
- Ventilation (Approved Document F)
- Thermal efficiency (Approved Document L)
- Security (Approved Document Q)
- Sound transmission (Approved Document E)
- Access (Approved Document M)

It's clear to see that the entire supply chain is being affected by The Hackitt Report and in 2018, the GGF technical team participated in practically every meeting of government officials on potential changes to legislation, standards and building regulations.

Throughout the year, the technical staff has ensured that Members received the key information first, with updates at every specialist group and regional meeting.

Following the Federation's influential and preparatory work on standards and regulations, our aim is to continue to fully engage with the Government on regulatory and legislative changes.

There is no doubt, there is uncertainty ahead, but with the GGF's consistent commitment to delivering high quality technical services and providing accurate up-to-date information, Members can rest assured we will do all in our power to help their businesses cope through these very challenging times.



04

Marketing and Communications



James Lee
Director of External Affairs

"It was another outstanding year for the marketing and communications with the GGF reaching record levels for PR coverage and website traffic"

It was another outstanding year for the Federation's marketing and communications with the GGF reaching record levels for PR coverage and website traffic.

The major project for the Marketing department in 2018 was the re-launch of the GGF trade website which included creating a new mobile responsive platform for over ten thousand online files including technical publications, news stories and feature articles plus the minutes and agendas of GGF meetings. It was a mammoth but worthwhile task as it has made GGF.org.uk, a trade website that is much easier to navigate and search for key technical and industry information.

It was also an extremely successful year for MyGlazing.com attracting over 250k users to achieve a landmark 500k users since the launch of the GGF's consumer advice website in 2016. The strong emphasis on fair, free, impartial advice clearly makes MyGlazing.com attractive for consumers. As well as the impressive online visitor numbers, the consumer PR coverage for the site exceeded 70 million opportunities to view in the consumer and lifestyle press.

myglazing.com

As well as the significant increase in online activity, the GGF also raised its profile at major events and exhibitions in 2018 with strong presence at the following trade fairs;

- Fensterbau Frontale, the world's largest window and door exhibition which attracts over 100k international visitors

- Glasstec Dusseldorf – the largest international trade show for the glass industry drawing over 50k visitors
- FIREX International – a key trade show for all those responsible for fire safety in buildings
- The International Glass Association Conference – the main conference for the global industry's trade bodies and international media to meet and share information on the common issues affecting glass and glazing

The outstanding highlight of the GGF's 2018 events calendar was the annual Members' Day event that attracted just over 100 delegates to The National Conference Centre in Birmingham for a day of topical presentations and networking. The GGF also held a successful social event for Members on the evening before Members' Day, at The National Motorcycle Museum.

Though it was a highly active year, the new Government legislation GDPR (General Data Protection Regulation) brought the GGF's marketing and communications into sharp focus. In-house training was essential for all those responsible for handling personal data and information at the GGF. The training and advice was rolled out to also help Members comply with the new regulation.

The marketing of the GGF was recognised in 2018 by the Construction Marketing Awards (CMAs) which shortlisted the GGF as a finalist in three categories including best use of research, best mid-budget campaign and best brand positioning for



the GGF's 40th Anniversary campaign. With all sectors in construction entering these awards it was a considerable achievement for the GGF to be selected along with the very best marketing campaigns for the construction industry in 2018.

In the last quarter of 2018, the Federation launched a new e-newsletter called Members First which brings the GGF's news to Members in a more instant and presentable format. This new service has been well received by Members and complements the GGF's existing quarterly magazine GLASSi.



Using these exclusive communication channels for Members will ensure the GGF continues to deliver consistent and accurate information to the membership.

2018 was an exceptional year of audience growth for the GGF. The Federation aims to build on its successful marketing and communications by creating even more content and awareness to raise the profile of the GGF and MyGlazing.com brands for the benefit of the membership.



05 Financial Report



Asha Pyndiah
*Group Director of Finance
and Company Secretary*

"During 2018, the GGF Board remained fully committed to developing the GGF and its commercial companies whilst overseeing the overall financial performance"

Although pockets of the UK economy continued to show some positive signs of growth through 2018, trading conditions remained challenging for companies in the glass and glazing industry. Against this climate, the GGF's subscription income remained level with more Members joining but also more Members taking advantage of the early bird and turnover return discounts for subscription renewal.

Other income during the period includes dividends received and group recharges from the GGF's commercial companies. Dividends from the subsidiary companies are lower due to more challenging market conditions. Despite this and changes in the organisational infrastructure, the commercial companies operating profit in 2018 was in excess of £1m.

We have referenced the GGF Helix Group operations income and costs for 2017 as a comparative. With changes in 2018, GGF Helix operations have been transferred to GGF Group, hence the improvement shown in the accounts for 2017.

During 2018, the GGF Board remained fully committed to developing the GGF and its commercial companies whilst overseeing the overall financial performance. As part of the governance, a Finance and Audit Committee was formed in June 2018, which has member representation and an independent Chair.

Finance Report 2018				
	GGF 2018	GGF 2017	GGF Helix Group 2017	GGF and GGF Helix Group re-instated 2017
Income				
Net Subscriptions	1,088,521	1,096,393	0	1,096,393
Other Income	2,939,948	1,713,507	1,659,793	3,373,300
Total Income	4,028,469	2,809,900	1,659,793	4,469,693
Less				
Direct costs and administrative overheads	4,145,850	3,504,072	1,488,122	4,992,194
Operating loss/surplus	-117,381	-694,172	171,671	-522,501
Interest receivable	1,617	1,070	0	1,070
Other-Dividend payable	0	0	-85,836	-85,836
Corporation tax charge, net of deferred tax and group relief	384,850	134,521	-34,663	99,858
Loss/surplus after tax	269,086	-558,581	51,173	-507,409
Accumulated surplus brought forward	9,527,755	10,111,337	351,005	10,462,342
Actuarial movement on pension scheme	9,000	-25,000	0	-25,000
Members' Funds	9,805,841	9,527,755	402,178	9,929,933

To use the finances appropriately and prudently, an Investment Committee was also formed to oversee investment across the group. These continuous commitments are providing a stable financial platform for both the GGF Members and Staff thus ensuring a secure long-term future for the Federation.

With consolidated and more effective use of the company's finances, we will continue to ensure we provide the best value and services for our Members and remain in our strong position as the main trade organisation in the glass and glazing industry.



06

GGF Board, Groups, Regions and Committees

GGF Board

Committee	
John Agnew	President
Mark Austin	Vice-President
David Thornton	Chair, Home Improvement Executive
Tony Smith	Chair, Glazing Executive
Alex Gray	Chair, Regional Representatives Committee
Michael Butterick	Chair, Flat Glass Manufacturers Association
Gareth Jones	Chair, Systems House Group
Gaby Mendham	Board Director

GGF Committees

Committee	Chair
Finance and Audit	Tony Morgan
Investment	Tony Morgan
GGF Fund	Tony Morgan
Membership and Review	Mark Austin
Health and Safety	Andy Hunter
Marketing and Communications	Greg O'Donoghue
Political Strategy	Steve Rice
Regional Representatives	Alex Gray
Standards	Brian Waldron

GGF Technical Groups

Home Improvement Executive	Chair	Secretary
Conservatory Association	Phil Goult	David Borland
Consumer Management Group	Rick Short	Petra Akinsiku
Hardware Group	Grant Stratford	David Borland
Heritage Window Group	Alan Burgess	James Lee
Home Improvement Technology Group (HITech)	Paul Kellett	Michael Sulston
Systems House Group	Gareth Jones	David Borland
Window and Door Group	Mark Austin	David Borland

Glazing Executive	Chair	Secretary
Curved Glass Group	Steve Bramhill	Steve Rice
Emergency Glazing Group	Sam Grant	Peter Stuttard
Fire Resistant Glazing Group	Steve Bond	Adrian Blaydon
Glass Repair Group	Bob Griffin	Michael Sulston
Glazing Components Group	Richard Sellman	David Borland
Insulating Glass Manufacturers	Mike Gaillard	David Borland
Laminators Group	Liam Williamson	Ben Wallace
Modified Glass Group	Stephen Byers	Michael Sulston
Mirror Group	Gary Martin	Steve Rice
Safety Glazing Group	Chris Davis	Ben Wallace
Special Glass Applications	Brian Waldron	Steve Rice
Tougheners Group	John Beddoes	Ben Wallace
Window Film Group	Martin Townend	Michael Sulston

Regions

Regions	Chair	Secretary
East Anglia	Gaby Mendham	Peter Stuttard
Kent, Surrey and Sussex	Alan Hyde	Peter Stuttard
London	John Mannell	Peter Stuttard
Midlands	Cheryl Biggs	Diana Blair
North West and North Wales	Dave Broxton	Ann-marie Waugh
North East and Yorkshire	David Logan	Ann-marie Waugh
Wessex and Channel Isles	Alan Fielder	Diana Blair
West of England and South Wales	Rod Tomlinson	Diana Blair

Countries

Country	Chair	Secretary
Scotland	Alex Gray	Ann-marie Waugh
Northern Ireland	Ian Young	Noreen McNairney
Republic of Ireland	Declan Coulter	Noreen McNairney
MENA Region	Pascoal DSilva	Steve Rice



Glass and Glazing Federation

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