

A Global Look Stateside

by Casey Flores

Global Window Films, based in Mumbai, India, churns out 20 million square feet of film per month.

In a time when global economic growth is slowing, Global Window Films is doing just the opposite. The company is thriving, thanks to the world's largest window film market: the United States. In what some may consider a maturing industry, Global representatives say its U.S. film sales have grown 20% annually and project this growth rate to increase further. How are they doing it?

Growth Matters

In partnership with its six distributors, the company has been aggressive with one of the most basic sales tactics known to mankind: offering free samples. For Global, this tactic is working better than ever—particularly following the launch of its QDP film in 2016. “Almost everyone who has sampled it has become a repeat customer,” says Vinod Nair, Global Window Film's vice president of sales and marketing.

“The window film industry in the U.S. is growing by about 6-7% per year ... and we've been able to take market share from others,” says sales director S. Krishnan, noting that a consistent presence at trade shows like SEMA and the International Window Film Conference and Tint-Off™ have helped achieved strong returns on investment. “This is primarily

because of the quality of the product we produce at a price which is acceptable.”

Price is a key competitive factor for Global. When it comes to keeping the cost of its product down, the company has a few advantages. For one, it boasts one of the only vertically integrated manufacturing plants in the world. This means that while many of its competitors buy the base polyester film from other suppliers, Global makes its own, starting with the base petrochemical intermediate right down to the finished products. This eliminates dependency on other polyester manufacturers, enabling complete control of production—from polymers to packaged goods. That's important to the company because it ensures consistency across Global's films.

“From end-to-end, every single product is manufactured in house,” Krishnan says, including the adhesives and coatings.

It even has the potential to supply its competitors with the base film though company representatives declined to comment on whether they currently do so.

Its competitive price point has also granted the company success in supplying film for private-label brands, which has had many entries into the U.S. market in recent years. Most of the stated 20% growth fig-

ures, however, can be attributed to the Global brand itself.

“Just 4% of that comes from privately labeled films,” Krishnan says. “The other 16% is Global.”

Window films make up about half of the Mumbai, India-based Global's total business. The company also manufactures polyester films for other end-applications like packaging and labels, but is seeing its greatest success with its solar control film division, particularly in the United States. In fact, one fourth of Global's total window film sales come from the U.S. market alone.

Krishnan says the company's current U.S. growth spurt began roughly four years ago and it has maintained that rate each year. Worth noting is the parent company's stock is up significantly since this trend began.

As demand for its products has increased, Global is now focusing on its supply capabilities. The manufacturing plant is currently at capacity, churning out 20 million square feet of film per month, or 42,000 metric tons of polyester annually.

“We are growing our manufacturing lines and we are putting up new facilities,” Krishnan says. “We are currently ordering new lines to cater to this initial requirement.”

Despite its recent rapid expansion, the company management knows it can't drift on this success



forever without further innovation. In the film industry, being able to offer a quality, fail-proof product is a make-or-break issue no matter how competitively priced the film is. To that end, investment in R&D may be Global's primary focus.

R&D Machine

"The focus of the company is in terms of research and development," Krishnan says. "We spend a substantial portion of our revenues on research in the polyester film business."

This was evident when WINDOW FILM Magazine toured the Global facility this spring. Besides investing in traditional weathering machines and having its film set at a 45-degree angle under the intense sun (which expedites the weathering process by 2.5 times, they say), the company's 100-plus-member research and development always seeks ways to put new innovations on the market.

"We are looking at new applications in both the automotive and architectural industries and the changing environment pushes us to develop new products," says Mr. Kevalram, global R&D head.

To that end the company soon will have the newest paint protection film (PPF) on the market.



R&D director A.S. Kevalram shows how the company's security film keeps the underlying glass from being penetrated upon heavy impact.

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“It will have a self-healing top-coat that heals itself within 20 seconds, but usually much quicker,” without applying any heat to the surface, Kevalram says. “It will also be hydrophobic,” so water will bead up and slide right off without applying ceramic coating. A PPF software program for cutting machines is also in the works.

Much of the new manufacturing lines on the way will be dedicated to production of its PPF, Krishnan says, noting that if the product has the same adaption rate as its window film, Global’s current annual U.S. growth rate could double.

Some other film products exclusive to Global include an all-black film that offers total privacy, “even if the light is on inside,” Kevalram says, and a white-board film, which will be able to apply to any smooth surface, including oil-painted walls and even plywood or metal.

The company has its films patented in the U.S. “because it adds value,” Krishnan explains. That includes Global’s deep-dyed films, which are made by dyes being applied in the cross-section of the film for high color stability. This is a capability shared only by one other film manufacturer, according to Kevalram. Some of the company’s dyed film, including QDP, has a lifetime warranty due to its longevity—a perk the company introduced in 2004.

Another advantage of having a vertically integrated manufacturing facility is the company’s ability to include performance-enhancing additives in its base film. This is especially the case with its safety and security products. Since the company develops the film from scratch, it can adjust the film’s chemical composition, strengthening mechanical properties in ways that may not be as readily available to its competitors. The company has met security film’s ANSI standards since 2002, according to Kevalram.

“We have never had a failure for an impact test,” he says.



A water-dripping device that showcases a new hydrophobic PPF.

Long-Term Dedication

It’s taken Global a long time to get to this standard of innovation—and even a bit to get into the film business. The company was founded in 1933 as a car dealership, selling Jaguars and went into manufacturing only during the second World War—first as a plastics extruder before going into full-on production of nylon and polyester films. Now, with window film being a main source of business, it’s also a large contributor to employee retention.

With India being the world’s fastest growing major economy at more than 7%, competition for talent in the country is fierce, but the company has seen loyalty among its innovation team. In fact, during a lunch at the plant, the six Global employees in the room had more than 193 years of combined experience. More staff joined on the factory tour, with all except one having been with the company for more than 20 years.

That enthusiasm spans worldwide with more than 1,900 employees on payroll across its different offices, with plans to hire more in the coming years.

“Globally we have an opportunity to grow by selling in new markets or where we are not as focused. Once we see a saturation in developed markets, that is when we will go into those new markets,” Krishnan explains, citing Japan, Australia and New Zealand as current untapped markets or under-serviced territories.

Challenges Ahead

The company is projecting to have 40% annual growth in the U.S., largely based on the expectation its PPF will catch on. It may soon have the newest PPF on the market. But it’s important to take the current trade climate into account. While trade tensions with China remain, some analysts say India could become the administration’s next focus. Just this spring, the U.S. ended preferential trade treatment for the country, declaring it no longer a developing one.

Alas, with an 86-year company history, continual dedication to R&D, and a laser-like focus on the U.S. film market, Global seems to have set itself up to be a force in this industry for years to come. **WF**