

2022 MARKET PLANNING GUIDE

While electrical distributors expect solid growth next year, they will have to navigate through higher prices and supply chain shortages.

By Jim Lucy, Editor-in-Chief; Elinor Delagrange, Senior Research Manager; and David Eckhart, Senior Art Director

When electrical distributors, manufacturers and independent manufacturers' reps sat down with their management teams at this time last year for their strategic planning sessions, 2021 was one of the most difficult years they ever had to forecast. Concerns over COVID-19, the tenuous economic rebound, the difficulty in making regular face-to-face sales calls and doing product demonstrations were very much top of mind.

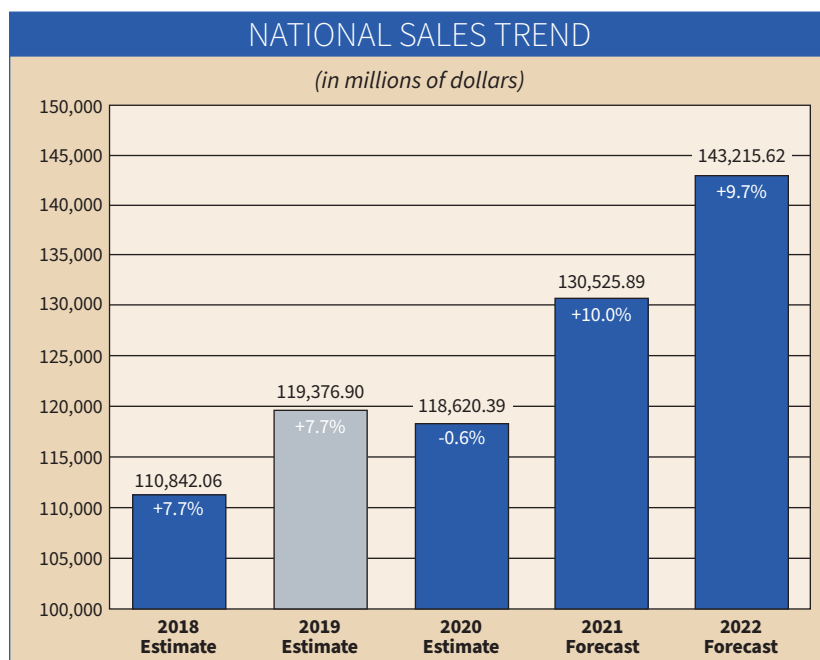
A new array of economic concerns must be factored into everyone's 2022 forecast. First, the good news for those who like to walk on the sunny side of the street. Thankfully, we have a better handle on COVID-19 today than we did 12 months ago, and more electrical contractors and other customers are cool with in-person sales calls. The global economy is also on a more solid footing than it was in 4Q 2020 and the overall expectations of many economists for U.S. GDP growth are in the +4% to +5% range. You can also expect the

construction industry to eventually see some real financial benefits from the recently passed Biden Infrastructure Bill.

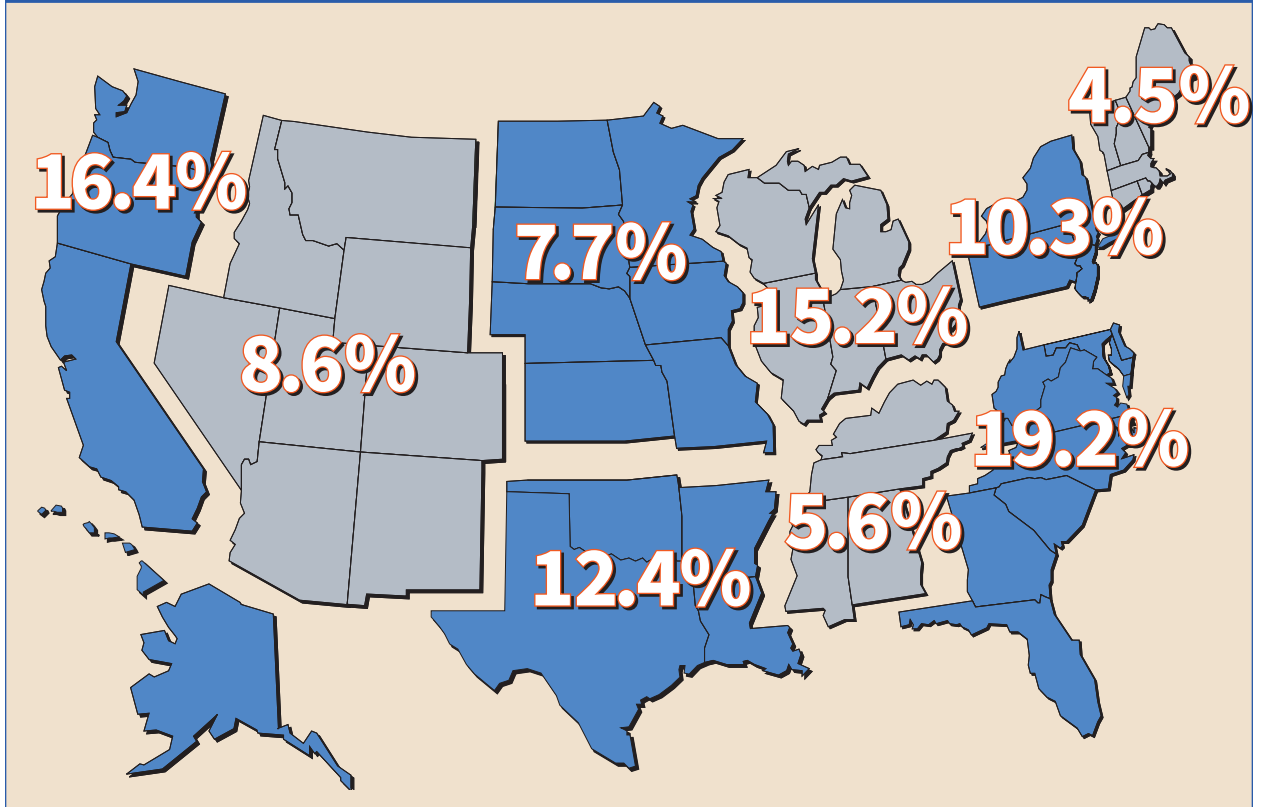
Yet 2022 is in some ways even more difficult to forecast than 2021. Historic double-digit, year-over-year price increases for all sorts of electrical products have sent shockwaves up and down the supply chain and don't seem likely to calm down in the short-term. All channel partners and end-use customers are being whipsawed by insane price increases in steel, copper, plastic and other base commodities. The supply chain is all out of whack, with shipping delays at ports rippling through trucking routes and freight-rail lines. The problems are most acute for electrical manufacturers that rely on China and other Pacific Rim nations for a steady supply of semiconductors.

At some point these price increases and shipping delays will settle into some sort of "new normal," but COVID-19 has changed the economy and is forcing all industry executives to answer at least three challenging questions:

- What will demand for new office buildings look like in the post-COVID world, where fewer workers are coming into the office five days a week?
- What will be the long-term impact of the remote office/hybrid office on collaboration, new employee training and employee morale and/or mental health?



PERCENTAGE OF 2021 ELECTRICAL DISTRIBUTORS' SALES BY REGION



■ With a tsunami of Baby Boomers opting for early retirement during what's now called the "Great Resignation," where will all of the new workers come from?

AND YET OPTIMISM REIGNS SUPREME

Despite what we have all been through and the far-reaching impact of the questions outlined above, most folks are surprisingly bullish about 2022. The 200-plus respondents to *Electrical Wholesaling's* survey for the 2022 Market Planning Guide are on average looking for a +10% increase in their 2021 sales and a +9.7% increase in sales for 2022, and that bullish outlook is enough to drive total industry sales through electrical distributors to \$143.2 billion. The *EW* forecast differs this year a bit more than usual from the forecast recently published by Christian Sokoll of DISC Corp., which is unusual because we are usually within a few points of each other. Sokoll is looking for an increase in total industry sales of +4.6% in 2022 to \$127 billion, after an

2022 NATIONAL MULTIPLIERS		
Market	Economic Factor	Multiplier
Electrical contractors	Number of electrical contractor employees	\$73,268
Industrial MRO	Number of manufacturing employees	\$920
Industrial OEM	Number of manufacturing employees	\$961
Factory automation	Number of manufacturing employees	\$125
Utilities	Number of metered customers	\$57
Government	Number of government employees	\$249
Mining	Number of employees at mining companies	\$624

increase of +19.7% in 2020. It's interesting to note that if you combine each of our forecasts for 2021 and 2022, we are only +3.6% apart in total for our growth estimates from 2020, when the industry was in the grip of the pandemic for most of the year. Be sure to read Sokoll's article "Mapping Out Market Clusters," on page 34. It offers some great insight on how to drill down into the clusters of economic activity at the local level.

CONSTRUCTION ECONOMISTS SPEAK OUT

With all of the factors mentioned earlier in this article, you can see why construction forecasting is a particularly tough business to be in. Two of our favorite annual construction forecasts are published by Richard Branch, the chief economist for Dodge Data & Analytics, and Kermit Baker, chief economist for the American Institute of Architects (AIA). In the 2022

Dodge Construction Outlook, Branch said he expects total construction to increase +6% in 2022 to \$946 billion, after a +12% increase in 2021. It's interesting to note that his forecast for a total combined increase of +18% in total construction starts from 2020, is within a few points of the *EW* and DISC Forecasts for the increase in electrical product sales in the same time frame. Branch cautioned Construction Outlook attendees that although the construction market should enjoy steady but not spectacular growth next year, product pricing, materials

shortages and worker shortages will be some of the biggest issues. He is looking for the biggest increases in spending on construction starts in the following areas:

- Commercial: +12% to \$143 billion
- Warehouses: +13% to \$52.8 billion
- Offices: +10% to \$49.7 billion
- Retail: +14% to \$15.5 billion
- Hotels: +24% to 8.8 billion

Branch said in a recent press statement that although U.S. economic growth has resumed after a slowdown in 3Q 2021 because of the resurgence of the Delta variant of the coronavirus, “the construction

sector’s grip on growth remains tenuous.” “Long term, construction starts should improve, fed by an increase of nonresidential building projects in the planning pipeline and the recent passage of the infrastructure bill,” he said in the release. “Both will provide meaningful support and growth to construction in the year to come. This expectation, however, must be tempered by the significant challenges facing the industry: high prices, shortages of key materials and the continued scarcity of skilled labor. While healing from the pandemic continues, there’s still a long road back to full recovery.”

AIA’s Baker is optimistic about the construction industry’s fortunes in 2022. He says AIA architects are seeing more demand for retrofit work. “Even prior to the pandemic, architecture firms were reporting that almost half of their billings on average resulted from renovations, rehabilitations, retrofits, additions and historic preservation projects on the existing building stock,” he said in a post about AIA’s Consensus Construction Forecast. “This was before concerns developed regarding how buildings could be made safer for employees and customers with heightened health concerns.

“After declining about -2% last year, the AIA Consensus Construction Forecast Panel in its mid-year update is projecting that spending on nonresidential buildings will decline an additional -3.9% in 2021 — an upgrade from the -5.7% decline forecast at the beginning of the year — and that 2022 will see a +4.6% increase in spending. The strongest performers this year are expected to be health care facilities (+1.4%), and a few others that should see only modest declines (retail, (-1.3%); religious, (-0.9%); and education, (-2.1%). However, in 2022 virtually all the nonresidential building sectors are expected to see healthy growth, paced by lodging, as well as amusement and recreation, both of which saw steep declines during the pandemic.”

HOT LOCAL MARKETS

The Regional Factbook on pages 24-33 offers a good overview of which states and Metropolitan Statistical Areas (MSAs)

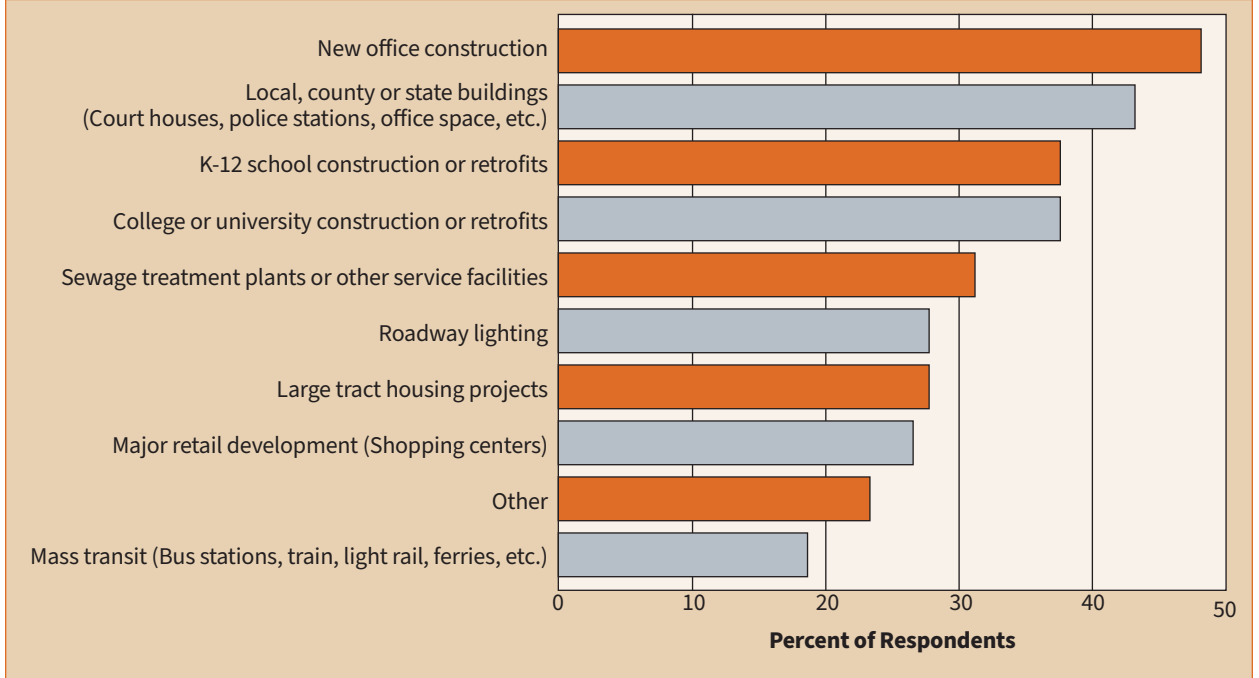
NATIONAL SALES-PER-EMPLOYEE

Year	Market Planning Guide	Top 200
2020	\$469,334	\$750,973
2019	\$648,465	\$702,144
2018	\$636,218	\$693,580
2017	\$640,285	\$631,950
2016	\$541,100	\$665,428
2015	\$535,332	\$634,791
2014	\$647,595	\$651,317
2013	\$566,847	\$668,515
2012	\$553,712	\$684,385
2011	\$526,331	\$666,635
2010	\$541,519	\$624,204
2009	\$574,756	\$633,596
2008	\$554,269	\$644,684
2007	\$541,872	\$519,215
2006	\$400,000	\$640,910
2005	\$478,413	\$593,506
2004	\$394,892	\$540,638
2003	\$319,704	\$469,536
2002	\$326,400	\$472,167

2022 FORECASTS FOR KEY ELECTRICAL BUSINESS SECTORS

	Increase	Decrease	Stay the same
Residential	48.0%	8.2%	43.8%
Industrial	59.6%	10.6%	29.8%
Commercial	63.6%	11.7%	24.7%
Institutional	41.4%	12.4%	46.2%
Government	37.8%	11.2%	51.1%
Utilities	40.6%	8.0%	51.5%

WHICH PROJECTS DO YOU EXPECT TO BREAK GROUND IN YOUR MARKET IN 2022?



DISTRIBUTORS SPEAK OUT ON IMPACT OF INFRASTRUCTURE BILL

	No Impact	Minimal Impact	Major Impact
Expansion of high-speed broadband internet for underserved rural or urban areas	37.6%	48.9%	13.5%
Electric utility grid expansion or retrofit	24.2%	50.0%	25.8%
Electric vehicle charging stations	28.5%	47.7%	23.9%
Expansion or retrofit of traditional infrastructure projects, including roads, bridges, rail, ports and airports	27.3%	43.9%	28.8%

have seen the most employment growth in the core electrical contractors and industrial customer segments. Another good resource is *Electrical Wholesaling's* August/September issue, which had an extensive report on the fastest-growing local market areas. If you have been tracking *EW's* picks for the hot local market areas over the past few years, there weren't any surprises in this issue. The Austin metro remained at the top of the list, followed by the Sarasota; FL, Dallas; Jacksonville, FL; Raleigh, NC; Nashville, TN; Charlotte, NC; and Tampa, FL, markets.

If you need regular updates on local market data, *Electrical Marketing* newsletter provides 24/7 online access at www.electricalmarketing.com to electrical sales forecasts, residential building

permits, local construction projects and population growth.

HOW TO USE THE MARKET PLANNING GUIDE

The market planning data in this issue is divided into nine regions of the United States. For each region, you'll find an economic snapshot of the region and employment statistics for the typical distributors' two largest customer groups — electrical contractors and manufacturing employees — and sales potential by state and for each region's largest MSAs. We develop those estimates using sales-per-employee multipliers and employment data combined by the U.S. Bureau of Labor Statistics (a three-month average of employment data from July 2021 through Sept. 2021).

Methodology. Our forecasts are based upon responses to *EW's* annual Market Planning Guide (MPG) survey. Each year, the magazine asks electrical distributors for their previous year's final sales results, sales predictions for the current year, and predictions for the following year. It also asks respondents how sales for the first six months of the current year compared with the first six months of the previous year.

With 203 electrical distributors providing sales forecasts and other information, we got a better response than in 2020 and are able to provide a reliable national forecast for sales through electrical distributors. Unfortunately, we did not get as a strong enough response rate to provide sales forecasts at the regional level. We did not get enough respondents



Photo courtesy of Ford Motor Co.

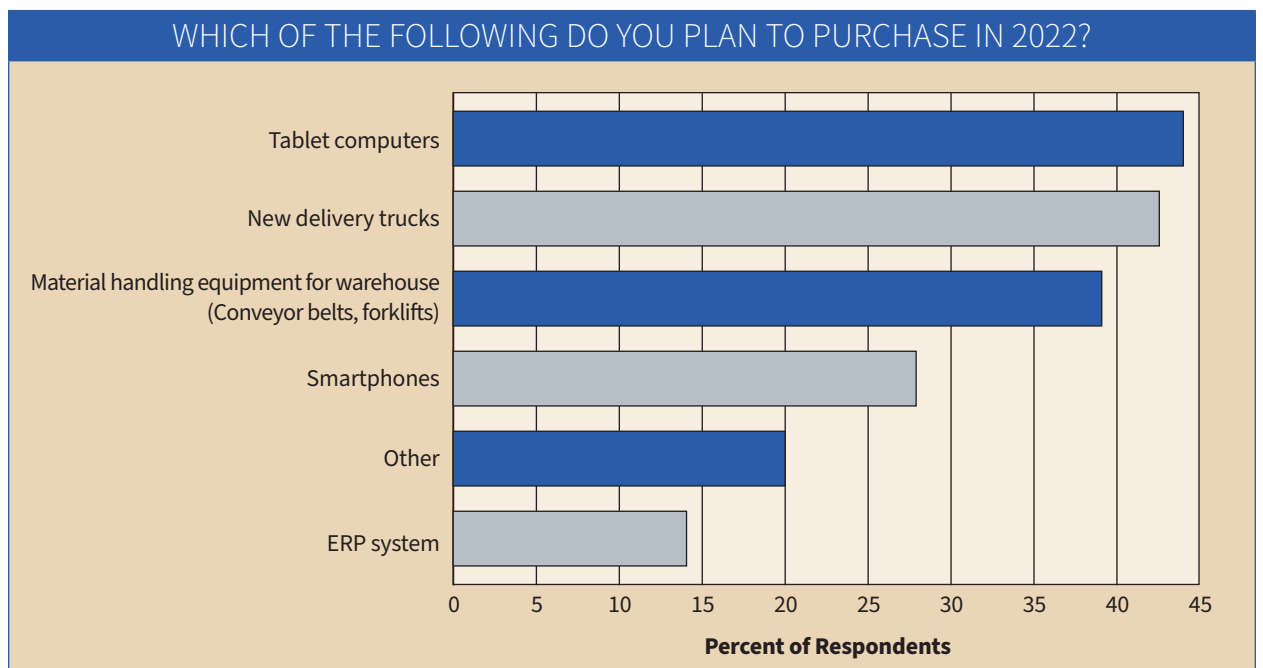
At two new EV battery plants, Ford and SK Innovation plan to invest \$11.4 billion and create a total of 11,000 new jobs in Stanton, TN, and Glendale, KY. Production of the new electric vehicles and advanced lithium-ion batteries will begin in 2025.

for each of the nine U.S. Census regions to provide reliable forecasts. Please respond to next year’s survey when you see it — filling it out only takes a few minutes and it helps us produce more reliable electrical sales forecasts. On a national basis, respondents reported a mean sales-per-employee number of \$469,334 for 2020, a significant decrease from \$648,465 for 2019, and from the \$750,973 sales-per-employee reported by *EW*’s Top 150 Electrical Distributors

in the May-June issue. Be sure to check how your company’s productivity compares with the national when it comes to sales-per-employee.

A note on our national sales base number. The base sales number for our national sales forecast comes from the Census of Wholesale Trade that the Commerce Department sends out every five years. Data from the most survey in 2012 was finally available in 2015 for the category that most closely defines our

electrical market — “NAICS: 423610 - Electrical apparatus and equipment, wiring supplies, and related equipment merchant wholesalers” (specifically “Merchant wholesalers, except manufacturers’ sales branches and offices”). Although the Commerce Dept. recently published its national numbers for its definition of a distributor of electrical supplies, *EW* will not use this number as a base for its sales estimates until the Commerce Dept. also publishes its product



LARGEST CONSTRUCTION PROJECTS NOW UNDERWAY OR ON THE DRAWING BOARDS

Contract Value (\$ Millions)	Project	City	State	Project Type	Status	Source
8500	ZVenture Global LNG Export facility	Plaquemines Parish	LA	Oil & gas	Broke ground October 21	construction.com
7000	Hall Park mixed-use mega-project	Frisco	TX	Mixed-use	Fall 2023 start	Dallas Morning News
7000	Multi-office and data center expansion across United States	Multiple	US	Offices & data centers	Plans announced	constructiondive.com
6000	First phase of Taiwan Semiconductor plant	Phoenix	AZ	Industrial	Broke ground October 21	construction.com
5600	Mayo Clinic - Multi-year expansion project	Rochester	MN	Hospital	Plans announced	Beckers Hospital Review
3750	University of California - Davis Health - 16-story hospital and 5-story pavilion	Sacramento	CA	Hospital	Plans announced	Beckers Hospital Review
2000	Massachusetts General Brigham - Multiple projects in Massachusetts and New Hampshire	Boston	MA	Hospital	Plans announced	Beckers Hospital Review
2000	Facebook expansion of existing campus	Prineville	OR	Data center	Plans announced	bisnow.com
1740	Harborview Medical Center renovation	Seattle	WA	Hospital	Plans announced	Beckers Hospital Review
1600	Harbor-UCLA Medical Center - 346-bed tower & outpatient building	West Carson	CA	Hospital	Plans announced	Beckers Hospital Review
1500	Children's Healthcare of Atlanta	Atlanta	GA	Hospital	Plans announced	Beckers Hospital Review
1500	Diamond Green Diesel refinery	Port Arthur	TX	Oil & gas	Underway	construction.com
1300	Methanex Methanol Plant	Geismar	LA	Industrial	Broke ground October 2021	construction.com
1200	Ohio State University's Wexner Inpatient Hospital Tower	Columbus	OH	Hospital	Broke ground Feb. 2021	construction.com
1200	Terminal Warehouse conversion in Chelsea neighborhood	New York	NY	Multi-family	Underway	construction.com
1200	1.1 GW Sanborn Solar Facility	Mojave	CA	Renewables - Solar	Underway	construction.com
1000	Second & third phase of California Northstate University medical center	Sacramento	CA	Hospital	Broke ground in September	construction.com
1000	Brooklyn Hospital Center	Brooklyn	NY	Hospital	Plans announced	Beckers Hospital Review
1000	Research & Development District office project	San Diego	CA	Office	Underway	construction.com
1000	University of California - Irvine	Irvine	CA	Hospital	Plans announced	Beckers Hospital Review
1000	Collin Creek redevelopment	Plano	TX	Mixed-use	Planning stage	collincreekplano.com
1000	Inova Health Systems campus	Alexandria	VA	Hospital	Plans announced	Beckers Hospital Review
1000	Ginger data centers	West Des Moines	IA	Data center	Plans announced	datacenterdynamics.com
920	Michigan Medicine's University Hospital new facility	Ann Arbor	MI	Hospital	Underway	mlive.com
915	Gateway South transmission project	Medicine Bow	WY	Utility	Underway	construction.com
896.6	LAX Airport Metro Connector	Los Angeles	CA	Airport	Underway	enr.com
850	Nucor steel mill	Brandenburg	KY	Industrial	Broke ground Jan. 2021	construction.com
840	Veteran Affairs (VA) Hospital	Louisville	KY	Hospital	Approved	wdrb.com
825	450-MW Desert Quartzite Solar Facility	Blythe	CA	Renewables - Solar	Broke ground Jan. 21	construction.com
800	Facebook Eastmark Parkway data center	Mesa	AZ	Data center	Broke ground in August	construction.com
800	1.5-million-sq-ft fulfillment center	Lancaster	TX	Warehouse	Announced plans in November	businesswire.com
785	ApiJect Systems' Gigafactory	Durham	NC	Factory	Underway	construction.com
670	Pittsburgh International Airport modernization	Pittsburgh	PA	Airport	Broke ground in September	construction.com
658	Irvine Campus Medical Complex	Irvine	CA	Hospital	Broke ground in September	construction.com
625	Atkina Solar Power Project	Wharton County	TX	Renewables - Solar	Underway	construction.com
616	Flamingo Crossing Apartments	Winter Garden	FL	Multi-family	Broke ground in August	construction.com

sales data *EW*'s editors need the product data to refine the Commerce Dept.'s sales estimates for electrical wholesalers.

Here's why. The U.S. Commerce Dept. has a very broad definition of an electrical distributor, and its 2017 data shows 8,398 electrical distributors operating 13,801 branch locations and doing \$131,748,162 in total combined revenue. *EW*'s editors don't believe the Commerce Dept.'s 2017 sales number is accurate because the related product data in the 2012 survey included distributors of HVAC equip-

ment, electronics components and other products not typically carried by full-line distributors of electrical supplies. Including these companies basically doubles the company count for what *EW*'s editors and most veteran industry execs would consider to be distributors of electrical supplies. The huge branch count in the 2012 Commerce Dept. data really sticks out, too, when you compare it to the branch count in *Electrical Wholesaling*'s most recent Top 150 ranking. The distributors in that ranking operate an

estimated 7,912 branches, quite short of the Census estimate.

When the 2012 Census of Wholesale Trade came out, we worked with the late Herm Isenstein, founder, DISC Corp., Orange, CT, to develop a base sales estimate for 2012 of \$86.5 billion. *EW*'s sales estimates will use this base national sales number until the product data for the next Census of Wholesale Survey is available. *EW*'s editors will "bring forward" that number for an annual national sales forecast each year using the same survey methodology that Andrea Herbert, *EW*'s late chief editor, first developed in the 1970s for the Market Planning Guide.

A GREAT RESOURCE FOR YOUR MARKET PLANNING

In addition to the analysis and data that we will continue to provide in *Electrical Wholesaling*'s annual Market Planning Guide and at www.ewweb.com, be sure to check out a terrific resource for electrical market data available online 24/7 to subscribers to *Electrical Marketing* newsletter (www.electricalmarketing.com). We have a special rate of \$99 for a one-year subscription. Subscribers will get a unique package of online electrical market data not available anywhere else in the industry. In addition to keeping you current on industry news with its regular twice-a-month issues, *Electrical Marketing* subscribers will get a wealth of regularly updated electrical market data that will include:

State & Metropolitan Statistical Area (MSA) Electrical Sales Potentials (Updated quarterly). *Electrical Marketing*'s estimates for total electrical sales, as well as estimates specific to the electrical contractor and industrial markets – the two end-user electrical markets that account for more than 75% of all sales through full-line electrical distributors.

County-Level Sales Potentials (Updated twice per year). Allows you to drill down to the core electrical sales potential in the electrical contractor and industrial markets in more than 900 counties.

State-Level Electrical Product Sales Potential by Product Group (Updated annually). *EM*'s estimates for state-level electrical sales potential are based on product mix data from more than 100 of the largest electrical distributors.

Local Construction Projects (Updated quarterly). A database of the largest construction projects in local markets across the U.S., with links to additional project information in news reports.

Electrical Marketing Update presentations. Available only to *Electrical Marketing* subscribers, presentations offer subscribers and their management teams quick updates on developing trends in the electrical market. Presentations available a PDF format post-event. Sponsorships for these forecasts in a webinar are available.

Local Electrical Market Indicators (Updated quarterly). Keep tabs on building permits, gross metropolitan product, population growth and employment trends in core market segments.

Interested? You can start your annual subscription to *EM* by going to www.electricalmarketing.com and tapping on the "Subscribe" button, or by calling 877-382-9187 / electricalmarketing@omeda.com.

DEVELOPING SALES ESTIMATES

When developing any market forecast, gathering some basic data on the size and makeup of the market is the first step. Let's take a look at some of the ways you can crunch the numbers we've provided to tailor them to your business.

One of the most common uses of this resource is for developing a business plan, whether it be for internal use as your guide for next year or for a presentation to an investor or banker. You will need something that states the size of the local market, and these sales figures are a documented source you can use "as is."

This data will also be helpful in establishing a sales forecast for your company and your region, comparing nearby or far-flung markets with an eye to opening or closing a branch, and evaluating promising areas of new business. One question distributors should ask themselves — and suppliers will be asking — is: "Are our sales into the market at the level they should be?" Look at the estimate of the overall sales in your market in comparison with your company's sales.

Employment in major customer markets. In addition to sales forecasts, employment numbers make up a large part of the regional profiles. The number of people employed by a company or in an industry tends to rise and fall with the volume of business it's doing. Employment figures, therefore, act as a gauge

50 LARGEST METROS FOR SINGLE-FAMILY CONSTRUCTION

Rank	Name	1-Unit Building Permits - Sept. 21	# Change YOY	% Change YOY	5-Units+ Building Permits - Sept. 21	# Change YOY	% Change YOY
1	Houston-The Woodlands-Sugar Land, TX	40,255	4,946	14	11,368	(4,443)	-28
2	Dallas-Fort Worth-Arlington, TX	39,161	7,530	24	20,489	9,084	80
3	Phoenix-Mesa-Chandler, AZ	27,534	4,968	22	10,315	204	2
4	Atlanta-Sandy Springs-Alpharetta, GA	24,928	4,915	25	3,958	1,205	44
5	Austin-Round Rock-Georgetown, TX	19,250	3,923	26	19,515	4,570	31
6	Tampa-St. Petersburg-Clearwater, FL	15,444	3,761	32	4,317	1,215	39
7	Charlotte-Concord-Gastonia, NC-SC	14,767	1,509	11	6,929	2,797	68
8	Orlando-Kissimmee-Sanford, FL	13,466	2,099	18	10,211	3,027	42
9	Jacksonville, FL	12,725	3,383	36	4,836	3,103	179
10	Nashville-Davidson-Murfreesboro-Franklin, TN	12,625	2,196	21	10,113	1,989	24
11	Raleigh-Cary, NC	11,196	1,831	20	5,273	2,355	81
12	San Antonio-New Braunfels, TX	11,161	3,639	48	6,490	1,979	44
13	Washington-Arlington-Alexandria, DC-VA-MD-WV	10,642	709	7	10,249	2,991	41
14	Denver-Aurora-Lakewood, CO	9,911	1,971	25	10,613	5,653	114
15	New York-Newark-Jersey City, NY-NJ-PA	9,794	1,873	24	28,673	(664)	-2
16	North Port-Sarasota-Bradenton, FL	9,481	3,414	56	2,407	1,717	249
17	Las Vegas-Henderson-Paradise, NV	9,083	1,814	25	2,494	552	28
18	Riverside-San Bernardino-Ontario, CA	8,941	(89)	-1	1,465	637	77
19	Minneapolis-St. Paul-Bloomington, MN-WI	8,724	1,772	25	9,989	2,331	30
20	Cape Coral-Fort Myers, FL	8,317	3,556	75	1,353	(1,890)	-58
21	Los Angeles-Long Beach-Anaheim, CA	8,272	1,539	23	14,204	3,354	31
22	Chicago-Naperville-Elgin, IL-IN-WI	7,711	1,970	34	5,248	751	17
23	Indianapolis-Carmel-Anderson, IN	7,508	1,703	29	1,480	(738)	-33
24	Myrtle Beach-Conway-North Myrtle Beach, SC-NC	7,429	2,337	46	474	338	249
25	Lakeland-Winter Haven, FL	7,194	2,290	47	1,640	400	32
26	Sacramento-Roseville-Folsom, CA	7,072	1,925	37	1,934	(901)	-32
27	Greenville-Anderson, SC	6,994	2,375	51	680	(350)	-34
28	Seattle-Tacoma-Bellevue, WA	6,978	360	5	13,709	4,135	43
29	Portland-Vancouver-Hillsboro, OR-WA	6,678	964	17	5,201	821	19
30	Miami-Fort Lauderdale-Pompano Beach, FL	6,664	1,204	22	11,940	548	5
31	Philadelphia-Camden-Wilmington, PA-NJ-DE-MD	6,574	953	17	10,442	7,022	205
32	Boise City, ID	6,482	614	10	2,348	1,416	152
33	Oklahoma City, OK	6,038	979	19	171	(80)	-32
34	Provo-Orem, UT	5,981	953	19	2,964	2,525	575
35	Columbus, OH	5,250	1,462	39	3,304	(829)	-20
36	Kansas City, MO-KS	5,230	870	20	2,792	(776)	-22
37	Charleston-North Charleston, SC	4,681	396	9	1,783	(407)	-19
38	Richmond, VA	4,650	984	27	1,748	(8)	0
39	Columbia, SC	4,609	1,149	33	432	389	905
40	Detroit-Warren-Dearborn, MI	4,463	804	22	1,947	1,097	129
41	Fayetteville-Springdale-Rogers, AR-MO	4,441	1,011	29	988	(12)	-1
42	St. Louis, MO-IL	4,375	110	3	1,817	471	35
43	Ocala, FL	4,320	1,654	62	72	45	167
44	Salt Lake City, UT	4,317	513	13	4,144	303	8
45	Cincinnati, OH-KY-IN	4,275	295	7	1,832	562	44
46	Port St. Lucie, FL	4,255	1,343	46	1,074	955	803
47	Colorado Springs, CO	4,062	395	11	2,380	1,581	198
48	Tucson, AZ	4,028	905	29	630	157	33
49	Deltona-Daytona Beach-Ormond Beach, FL	3,914	1,546	65	83	(392)	-83
50	Boston-Cambridge-Newton, MA-NH	3,822	466	14	8,029	1,822	29

Year-to-date building permits data through Sept. 2021 from U.S. Census Bureau



Photo courtesy of Hall Group

The \$7-billion Hall Park mixed-use mega-project is expected to break ground in 2023 in Frisco, TX.

to business prospects and conditions in end-user markets.

■ Employee counts can help you compare the relative sizes of various end-user groups in your area.

■ You can also compare the makeup of one market area to another, and consider new customer markets or ones that you could be serving better.

■ If you track the employment figures for each market over time, you'll see broad economic trends unfolding in your market.

■ You can also use these employment figures to make your own multipliers or you can use the national multipliers we've already calculated.

Multipliers. Each multiplier is a dollar figure that represents the average amount of electrical products distributors sell to each particular type of customer, on a per-employee basis or other "economic factor." (See *Electrical Wholesaling's* National Multipliers on page 15). When used with the employment figures in the regional profiles, the multipliers help establish the amount

of business electrical distributors could do with major customer groups in your area and in total.

For instance, to find the number of electrical contractor employees in Addison, IL, a city not detailed in the East North Central regional profile, you could contact the local Chamber of Commerce, a nearby union chapter, the state university, or the local library to track it down.

These multipliers come in handy if you want to approximate the amount of sales available from a particular account. For example, if a local manufacturer employs 300 people, by applying the multiplier of \$920, you would expect the facility to purchase about \$276,000 worth of electrical MRO products this year.

Using multipliers results in a dollar figure for market size that tells the level of business distributors in the area could do if every potential customer there bought a typical amount of product from them. It tends to be a larger number than actual distributor sales.

You can also use *EW's* multipliers to track sales through different types of

customers over time. Let's do that for total U.S. sales to electrical contractors. Next year, you can use *Electrical Wholesaling's* national multiplier of \$73,268 in sales for each electrical contractor employee. That's a pretty substantial jump in sales-per-employee from the \$71,828 estimate we used last year or the \$65,617 estimate we used back in 2019. If next year's multiplier seems a bit rich in your calculations, you can always tweak it down a bit to get what seems like a more realistic estimate.

Summary. With the historic price increases, supply chain shortages and lingering concerns over COVID-19, 2022 won't be a cakewalk for electrical distributors, manufacturers and independent manufacturers' reps. But companies throughout the electrical wholesaling industry proved their resilience during the depths of the pandemic, and the crisis management skills they honed during the past 18 months will help them navigate what hopefully will be a much more tolerable economic climate in 2022. ■



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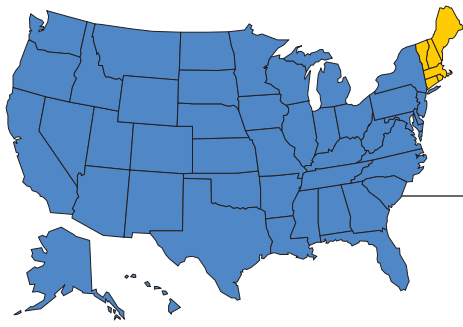
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New England

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The Boston metro once again dominates New England's electrical economy, with over \$2 billion in estimated electrical sales potential and solid gains over the past year in contractor employment, single-family and multi-family building permits and nonresidential construction. Dodge Data & Analytics said nonresidential construction through Sept. 2021 was up +18% to approximately \$6.9 billion in the Boston-Cambridge-Quincy MSA.

Along with several sizeable multi-family projects now underway valued at \$200 million-plus, according to *Boston Real Estate Times*, Beantown's construction business will benefit from up to \$2 billion in hospital work planned by Mass General Bingham, the state's largest owner of hospitals. These projects include a \$1-billion expansion at the Massachusetts General Hospital in Boston and four new outpatient sites in Massachusetts and New Hampshire.

2021 % OF U.S. SALES
4.5%
NEW ENGLAND

SALES POTENTIAL BY STATE (\$ MILLIONS)

	2021 Total	% of Region	Electrical Contractor \$ Estimate	Industrial \$ Estimate
NEW ENGLAND	5,431.1		3,175.3	1,169.6
CONNECTICUT	1,102.0	20.3%	574.3	307.3
MASSACHUSETTS	2,675.4	49.3%	1,662.1	478.3
MAINE	516.6	9.5%	305.4	107.8
NEW HAMPSHIRE	509.8	9.4%	273.4	134.5
RHODE ISLAND	365.2	6.7%	211.1	81.0
VERMONT	262.1	4.8%	148.9	60.7

METROS WITH THE MOST SALES POTENTIAL

(in millions of dollars)

Rank	Area	Total \$ Potential	Electrical Contractor \$ Potential	Industrial \$ Potential
1	Boston-Cambridge-Nashua (MA-NH)	2,003.4	1,234.1	368.6
2	Providence-Warwick (RI-MA)	459.3	264.8	102.6
3	Hartford-West Hartford-East Hartford, CT	378.7	192.4	110.6
4	Bridgeport-Stamford-Norwalk, CT	240.3	137.8	54.5
5	Springfield (MA-CT)	240.2	132.7	59.5
6	Worcester (MA-CT)	212.2	116.8	52.9
7	New Haven-Milford, CT	193.8	107.0	48.0
8	Portland-South Portland, ME	166.1	102.6	30.3
9	Burlington-South Burlington, VT	105.7	59.4	25.2
10	Barnstable Town, MA	97.3	70.5	7.4

EMPLOYMENT STATISTICS

Area	Electrical Contractor Estimate	YOY # Change	YOY % Change	Industrial Employment	YOY # Change	YOY % Change
CONNECTICUT	7,839	117	1.5	153,100	967	0.6
Hartford-West Hartford-East Hartford, CT	2,626	13	0.5	55,100	(467)	-0.8
Bridgeport-Stamford-Norwalk, CT	1,881	199	11.9	27,133	200	0.7
New Haven-Milford, CT	1,460	30	2.1	23,933	1,067	4.7
Norwich-New London, CT	537	17	3.3	18,500	1,000	5.7
MASSACHUSETTS	22,685	1,872	9.0	238,300	10,733	4.7
Boston-Cambridge-Nashua, MA-NH	16,844	1,365	8.8	183,667	7,167	4.1
Springfield (MA-CT)	1,811	225	14.2	29,633	1,367	4.8
Worcester (MA-CT)	1,595	143	9.9	26,367	433	1.7
Barnstable Town, MA	962	43	4.7	3,667	233	6.8
Pittsfield, MA	286	13	4.8	2,833	67	2.4
MAINE	4,169	56	1.4	53,733	4,700	9.6
Portland-South Portland, ME	1,400	48	3.5	15,100	1,033	7.3
Bangor, ME	442	13	3.0	2,267	(233)	-9.3
Lewiston-Auburn, ME	425	17	4.3	5,100	67	1.3
NEW HAMPSHIRE	3,731	(17)	-0.5	67,000	200	0.3
Manchester, NH	724	9	1.2	7,500	(67)	-0.9
RHODE ISLAND	2,882	316	12.3	40,367	3,367	9.1
Providence-Warwick (RI-MA)	3,614	329	10.0	51,133	4,100	8.7
VERMONT	2,032	4	0.2	30,267	2,400	8.6
Burlington-South Burlington, VT	810	35	4.5	12,533	533	4.4

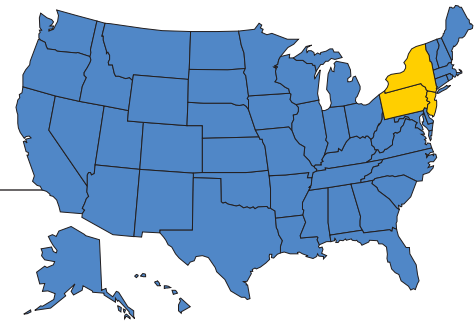
Metro areas are metropolitan statistical areas (MSAs) unless otherwise noted.

All employment data for Construction and Manufacturing is in thousands and represents the percent change in three-month moving averages from July 2021 - Sept. 2021 and July 2020 - Sept. 2020. Source: Current Employment Statistics from the Bureau of Labor Statistics.

Electrical contractor employment is an EW estimate based on internal data and data from the U.S. Bureau of Labor Statistics. Total Electrical Potential is the total of electrical contractor and industrial sales potential, which typically account for at least 75% of a full-line electrical distributor's sales, as well as an estimate for sales to other smaller customer niches.

Middle Atlantic

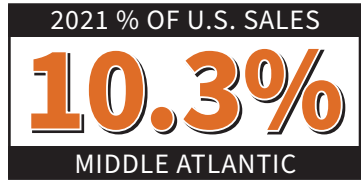
New Jersey • New York • Pennsylvania



EMPLOYMENT STATISTICS

Area	Electrical Contractor Estimate	YOY # Change	YOY % Change	Industrial Employment	YOY # Change	YOY % Change
NEW JERSEY	20,293	113	0.6	247,167	11,167	4.7
Camden, NJ	3,098	100	3.3	37,967	167	0.4
Trenton, NJ	689	(35)	-4.8	10,600	700	7.1
Atlantic City, NJ	659	(30)	-4.4	2,567	233	10.0
Vineland-Bridgeton, NJ	438	43	11.0	8,867	800	9.9
NEW YORK	49,075	(724)	-1.5	413,833	14,833	3.7
New York-Newark-Jersey City, NY-NJ-PA	48,949	(1,460)	-2.9	336,333	12,133	3.7
Nassau County-Suffolk County, NY	9,572	(589)	-5.8	67,233	1,633	2.5
Rochester, NY	3,185	325	11.4	60,433	6,600	12.3
Buffalo-Cheektowaga-Niagara Falls, NY	3,081	260	9.2	51,800	2,767	5.6
Albany-Schenectady-Troy, NY	2,890	186	6.9	25,733	300	1.2
Syracuse, NY	1,803	(9)	-0.5	24,967	500	2.0
Dutchess County-Putnam County, NY	1,066	17	1.7	8,267	(100)	-1.2
Binghamton, NY	589	35	6.2	10,767	333	3.2
Utica-Rome, NY	503	22	4.5	10,533	433	4.3
Kingston, NY	381	17	4.8	3,200	100	3.2
Glens Falls, NY	351	13	3.8	5,933	233	4.1
Watertown-Fort Drum, NY	221	(17)	-7.3	1,800	-	0.0
Elmira, NY	204	4	2.2	4,800	133	2.9
Ithaca, NY	169	4	2.6	2,433	(67)	-2.7
PENNSYLVANIA	33,297	160	0.5	550,433	17,367	3.3
Philadelphia-Camden-Wilmington, PA-NJ-DE-MD	15,825	589	3.9	175,867	2,500	1.4
Pittsburgh, PA	8,675	906	11.7	80,100	1,033	1.3
Lebanon, PA	7,388	316	4.5	8,800	(67)	-0.8
Philadelphia, PA	2,990	(4)	-0.1	31,267	533	1.7
Lancaster, PA	2,492	108	4.5	36,433	1,433	4.1
Allentown-Bethlehem-Easton, PA	1,790	65	3.8	39,033	1,467	3.9
Harrisburg-Carlisle, PA	1,660	61	3.8	22,100	733	3.4
York-Hanover, PA	1,616	56	3.6	32,667	2,033	6.6
Scranton-Wilkes-Barre-Hazleton, PA	1,378	35	2.6	27,400	733	2.8
Reading, PA	1,092	65	6.3	28,800	67	0.2
Erie, PA	559	(13)	-2.3	18,367	267	1.5
Altoona, PA	386	(17)	-4.3	6,500	(200)	-3.0
Chambersburg-Waynesboro, PA	338	-	0.0	8,600	267	3.2
Johnstown, PA	256	4	1.7	4,000	133	3.4
East Stroudsburg, PA	247	13	5.6	5,233	200	4.0
Gettysburg, PA	234	4	1.9	8,133	867	11.9
Bloomsburg-Berwick, PA	178	9	5.1	4,967	167	3.5

This region boasts an interesting mix of construction projects right now, and unlike past years there's much more to talk about than just Big Apple condo towers for zillionaires, the city's LaGuardia and Kennedy Airport projects, Penn Station renovations or the Hudson Yards development. Pittsburgh currently has a \$670-million airport modernization project underway, and the construction scene is alive in the Philadelphia area, with downtown Philly's \$287-million Schuylkill Yards West Tower; and the \$415-million Montgomery County Justice Center in Norristown, PA.



With an estimated \$6-billion-plus in sales potential, the New York metropolitan area will always be the big dog in this region. It covers all five boroughs of New York City, much of northern New Jersey, southern New York state and Long Island. Although *EW* estimates that electrical contractor employment was down -2.9% YOY through September in New York's core MSA, there's no shortage of mega-projects underway or on the drawing boards.

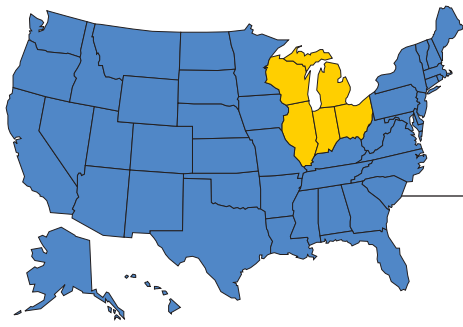
SALES POTENTIAL BY STATE (\$ MILLIONS)

	2021 Total	% of Region	Electrical Contractor \$	Industrial \$ Estimate
MIDDLE ATLANTIC	12,441.8		7,522.1	2,431.3
NEW JERSEY	2,478.6	19.9%	1,486.8	496.1
NEW YORK	5,532.7	44.5%	3,595.6	830.6
PENNSYLVANIA	4,430.4	35.6%	2,439.6	1,104.7

METROS WITH THE MOST SALES POTENTIAL

(in millions of dollars)

Rank	Area	Total \$ Potential	Electrical Contractor \$ Potential	Industrial \$ Potential
1	New York-Newark-Jersey City, NY-NJ-PA	5,326.8	3,586.4	675.0
2	Philadelphia-Camden-Wilmington, PA-NJ-DE-MD	1,890.6	1,159.5	353.0
3	Nassau County-Suffolk County, NY	1,045.4	701.3	134.9
4	Pittsburgh, PA	995.5	635.6	160.8
5	Lebanon, PA	698.7	541.3	17.7
6	Rochester, NY	443.3	233.4	121.3
7	Buffalo-Cheektowaga-Niagara Falls, NY	412.1	225.7	104.0
8	Philadelphia, PA	352.3	219.1	62.8
9	Albany-Schenectady-Troy, NY	329.3	211.8	51.6
10	Lancaster, PA	319.6	182.6	73.1



East North Central

Illinois • Indiana • Michigan • Ohio • Wisconsin

With a more industrial profile than other areas of the country, this region relies on a diverse mix of business to power its electrical economy. The Chicago metro, with more than \$3.2 billion in estimated electrical sales, saw a decline in nonresidential construction work according to Dodge Data & Analytics, with a -36% YOY slide to \$4.3 billion.

2021 % OF U.S. SALES
15.2%
EAST NORTH CENTRAL

But Chicago still has some big projects underway, including the \$500-million Barack Obama Presidential Center and the Ally biotech R&D center in

Lincoln Park. Two huge hospital projects are now underway on college campuses – the \$1.2-billion Ohio State University Wexner Inpatient Hospital Tower in Columbus, OH, and a \$920-million hospital at the University of Michigan.

That Ohio State project is probably the main reason nonresidential construction work in the Columbus, OH, MSA is enjoying a +39% gain this year through September to an estimated \$2.5 billion.

SALES POTENTIAL BY STATE (\$ MILLIONS)

	2021 Total	% of Region	Electrical Contractor \$ Estimate	Industrial \$ Estimate
EAST NORTH CENTRAL	18,359.0		9,058.4	5,628.8
ILLINOIS	4,294.4	23.4%	2,326.3	1,109.2
INDIANA	3,129.6	17.0%	1,426.2	1,077.5
MICHIGAN	3,661.7	19.9%	1,778.6	1,150.7
OHIO	4,512.6	24.6%	2,284.4	1,325.7
WISCONSIN	2,760.8	15.0%	1,243.0	965.6

METROS WITH THE MOST SALES POTENTIAL

(in millions of dollars)

Rank	Area	Total \$ Potential	Electrical Contractor \$ Potential	Industrial \$ Potential
1	Chicago-Naperville-Elgin (IL-IN-WI)	3,151.3	1,722.1	799.0
2	Detroit-Warren-Dearborn, MI	1,564.2	779.8	471.6
3	Indianapolis-Carmel-Anderson, IN	982.6	595.9	190.1
4	Cincinnati (OH-KY-IN)	860.0	464.2	223.8
5	Cleveland-Elyria, OH	774.5	395.6	224.0
6	Columbus, OH	746.9	453.7	143.8
7	Milwaukee-Waukesha-West Allis, WI	684.9	310.2	237.7
8	Grand Rapids-Wyoming, MI	598.6	259.7	219.2
9	Lake County-Kenosha County (IL-WI)	340.0	144.5	127.5
10	Madison, WI	332.7	188.3	77.9

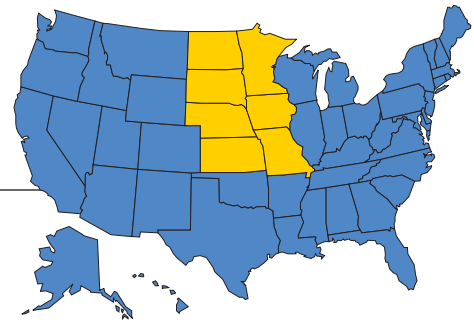
EMPLOYMENT STATISTICS

Area	Electrical Contractor Estimate	YOY # Change	YOY % Change	Industrial Employment	YOY # Change	YOY % Change
ILLINOIS	31,750	2,119	7.2	552,667	2,867	0.5
Chicago-Naperville-Elgin (IL-IN-WI)	23,504	719	3.2	398,100	2,767	0.7
Lake County-Kenosha County (IL-WI)	1,972	(13)	-0.7	63,533	2,367	3.9
Elgin, IL	1,816	(17)	-0.9	33,967	167	0.5
Peoria, IL	1,101	17	1.6	21,700	933	4.5
Rockford, IL	758	43	6.1	26,400	(1,733)	-6.2
Champaign-Urbana, IL	520	(4)	-0.8	7,567	67	0.9
Springfield, IL	503	(22)	-4.1	3,000	(200)	-6.3
Bloomington, IL	442	65	17.2	3,433	67	2.0
Decatur, IL	425	(17)	-3.9	10,933	500	4.8
Kankakee, IL	195	9	4.7	7,633	400	5.5
Danville, IL	78	-	0.0	4,500	(100)	-2.2
INDIANA	19,465	221	1.1	536,867	29,033	5.7
Indianapolis-Carmel-Anderson, IN	8,134	776	10.5	94,733	4,800	5.3
Gary, IN	1,920	(52)	-2.6	33,867	1,433	4.4
Fort Wayne, IN	1,551	4	0.3	35,100	100	0.3
South Bend-Mishawaka (IN-MI)	728	(26)	-3.4	16,433	867	5.6
Elkhart-Goshen, IN	594	65	12.3	73,433	9,133	14.2
Lafayette-West Lafayette, IN	524	17	3.4	19,467	833	4.5
Bloomington, IN	477	39	8.9	9,733	400	4.3
Terre Haute, IN	472	-	0.0	8,433	(367)	-4.2
Michigan City-La Porte, IN	273	4	1.6	8,100	633	8.5
Columbus, IN	234	4	1.9	19,367	767	4.1
Muncie, IN	230	9	3.9	3,400	-	0.0
Kokomo, IN	182	13	7.7	10,333	(633)	-5.8
Evansville (IN-KY), IN	1,096	(182)	-14.2	23,133	1,167	5.3
MICHIGAN	24,275	802	3.4	573,367	3,700	0.6
Detroit-Warren-Dearborn, MI	10,643	251	2.4	234,967	2,000	0.9
Warren-Troy-Farmington Hills, MI	7,778	290	3.9	146,633	(2,233)	-1.5
Grand Rapids-Wyoming, MI	3,545	156	4.6	109,200	800	0.7
Detroit-Dearborn-Livonia, MI	2,864	(39)	-1.3	88,333	4,233	5.0
Lansing-East Lansing, MI	1,252	113	9.9	17,933	(500)	-2.7
Kalamazoo-Portage, MI	927	48	5.4	22,067	367	1.7
Flint, MI	802	48	6.3	12,500	(633)	-4.8
Ann Arbor, MI	680	56	9.0	13,433	433	3.3
Saginaw, MI	438	13	3.1	10,833	(100)	-0.9
Niles-Benton Harbor, MI	325	35	11.9	12,200	433	3.7
Muskegon, MI	316	4	1.4	12,000	433	3.7
Jackson, MI	299	17	6.2	8,633	(167)	-1.9
Battle Creek, MI	269	17	6.9	10,133	(33)	-0.3
Monroe, MI	243	(4)	-1.8	5,367	67	1.3
Bay City, MI	208	17	9.1	4,767	267	5.9

(Continued on page 33)

West North Central

Iowa • Kansas • Minnesota • Missouri
Nebraska • North Dakota • South Dakota



EMPLOYMENT STATISTICS

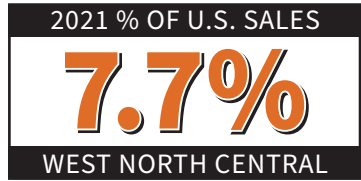
Area	Electrical Contractor Estimate	YOY # Change	YOY % Change	Industrial Employment	YOY # Change	YOY % Change
IOWA	10,578	91	0.9	223,767	9,567	4.5
Des Moines-West Des Moines, IA	2,929	143	5.1	20,967	733	3.6
Davenport-Moline-Rock Island (IA-IL)	1,417	121	9.4	23,267	1,200	5.4
Cedar Rapids, IA	1,088	17	1.6	19,800	600	3.1
KANSAS	8,589	204	2.4	162,100	5,667	3.6
Wichita, KS	2,188	(48)	-2.1	45,933	467	1.0
Topeka, KS	711	-	0.0	7,933	(100)	-1.2
MINNESOTA	18,551	1,057	6.0	318,900	11,533	3.8
Minneapolis-St. Paul-Bloomington (MN-WI)	12,363	732	6.3	198,333	7,033	3.7
Duluth (MN-WI), MN	1,257	35	2.8	8,333	667	8.7
St. Cloud, MN	1,109	69	6.7	14,733	767	5.5
Rochester, MN	724	22	3.1	10,267	(100)	-1.0
MISSOURI	17,160	377	2.2	272,767	6,900	2.6
St. Louis(MO-IL), MO	9,464	758	8.7	114,667	733	0.6
Kansas City (MO-KS), MO	7,297	347	5.0	83,000	4,567	5.8
Springfield, MO	1,296	(4)	-0.3	17,700	1,033	6.2
NORTH DAKOTA	3,922	178	4.7	26,167	967	3.8
Fargo (ND-MN), ND	1,417	186	15.1	10,333	433	4.4
Bismarck, ND	667	26	4.1	1,900	100	5.6
Grand Forks (ND-MN)	416	-	0.0	3,800	(167)	-4.2
NEBRASKA	7,778	290	3.9	101,400	4,233	4.4
Omaha-Council Bluffs (NE-IA)	4,104	104	2.6	33,967	1,133	3.5
Lincoln, NE	1,352	56	4.3	13,500	633	4.9
SOUTH DAKOTA	3,735	108	3.0	44,600	2,033	4.8
Sioux Falls, SD	1,491	156	11.7	14,500	467	3.3
Rapid City, SD	693	(17)	-2.4	2,933	133	4.8

Metro areas are metropolitan statistical areas (MSAs) unless otherwise noted.

All employment data for Construction and Manufacturing is in thousands and represents the percent change in three-month moving averages from July 2021 - Sept. 2021 and July 2020 - Sept. 2020. Source: Current Employment Statistics from the Bureau of Labor Statistics.

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The surge in data center construction in the Omaha, NE, and Des Moines, IA, markets continues, with the announcements that Microsoft will making a \$1-billion addition to its Ginger data center complex in West Des Moines, and that Facebook will be adding million square feet of data centers in a \$400-million addition to an existing facility in Papillion, NE. Other projects of note in this region include the billion-dollar expansion of Kansas City's airport now underway and the \$351-million expansion of the city's streetcar system. The eventual king of all construction projects in this region may be the Mayo Clinic's plans for more than \$5 billion in new construction over the next 20 years at its facilities in Rochester, MN. Leading off will be a \$200-million, 110,000-sq-ft expansion to its Proton Beam Therapy program that expected to be completed there by 2023.



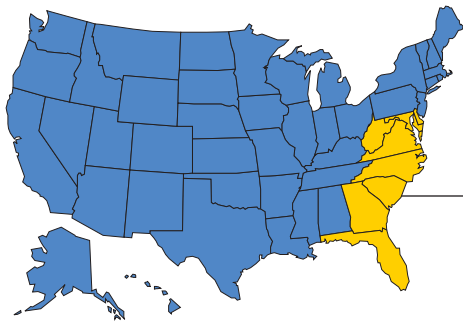
SALES POTENTIAL BY STATE (\$ MILLIONS)

	2021 Total	% of Region	Electrical Contractor \$	Industrial \$ Estimate
WEST NORTH CENTRAL	9,323.9		5,151.7	2,307.4
IOWA	1,530.1	16.4%	775.0	449.1
KANSAS	1,193.3	12.8%	629.3	325.3
MINNESOTA	2,499.0	26.8%	1,359.2	640.0
MISSOURI	2,255.9	24.2%	1,257.3	547.4
NORTH DAKOTA	424.8	4.6%	287.3	52.5
NEBRASKA	966.8	10.4%	569.9	203.5
SOUTH DAKOTA	454.0	4.9%	273.7	89.5

METROS WITH THE MOST SALES POTENTIAL

(in millions of dollars)

Rank	Area	Total \$ Potential	Electrical Contractor \$ Potential	Industrial \$ Potential
1	Minneapolis-St. Paul-Bloomington (MN-WI)	1,629.8	905.8	398.1
2	St. Louis(MO-IL)	1,154.4	693.4	230.1
3	Kansas City (MO-KS)	876.6	534.7	166.6
4	Omaha-Council Bluffs (NE-IA)	461.0	300.7	68.2
5	Des Moines-West Des Moines, IA	320.9	214.6	42.1
6	Wichita, KS	315.7	160.3	92.2
7	Davenport-Moline-Rock Island (IA-IL)	188.1	103.8	46.7
8	Sioux Falls, SD	172.9	109.2	29.1
9	Springfield, MO	163.1	94.9	35.5
10	Lincoln, NE	157.7	99.1	27.1



South Atlantic

Delaware • District of Columbia • Florida
 Georgia • Maryland • North Carolina
 South Carolina • Virginia • West Virginia

This region accounts for an estimated 19% of all U.S. electrical sales potential and is powered by some of the nation's fastest-growing Sunbelt vacation/retirement areas in Florida and the Carolinas, and billions of dollars in electrical sales potential in large metros like Washington, DC, Atlanta and Charlotte and Raleigh, NC. All of Florida's major MSAs are enjoying big-time single-family and multi-family residential growth, but Tampa, Sarasota and Jacksonville are particularly busy. Billions of dollars in data center construction in Washington DC's western suburbs and the Amazon HQ2 development west of downtown DC stand out along with Atlanta's plans for the \$1.5-billion Children's Healthcare hospital.

2021 % OF U.S. SALES
19.2%
 SOUTH ATLANTIC

SALES POTENTIAL BY STATE (\$ MILLIONS)

	2021 Total	% of Region	Electrical Contractor \$	Industrial \$ Estimate
SOUTH ATLANTIC	23,213.0		14,728.6	3,841.8
DISTRICT OF COLUMBIA	194.6	0.8%	153.7	2.0
DELAWARE	354.5	1.5%	234.3	49.3
FLORIDA	7,808.8	33.6%	5,479.0	768.0
GEORGIA	3,430.1	14.8%	1,957.0	787.0
MARYLAND	2,217.1	9.6%	1,553.2	220.5
NORTH CAROLINA	4,087.3	17.6%	2,325.0	944.8
SOUTH CAROLINA	1,923.8	8.3%	1,037.9	501.1
VIRGINIA	3,082.4	13.3%	1,988.5	477.5
WEST VIRGINIA	493.8	2.1%	303.5	91.5

METROS WITH THE MOST SALES POTENTIAL

(in millions of dollars)

Rank	Area	Total \$ Potential	Electrical Contractor \$ Potential	Industrial \$ Potential
1	Washington-Arlington-Alexandria (DC-VA-MD-WV)	2,075.7	1,548.1	112.5
2	Atlanta-Sandy Springs-Roswell, GA	1,967.6	1,238.9	335.2
3	Miami-Fort Lauderdale-West Palm Beach, FL	1,891.4	1,337.3	175.8
4	Tampa-St. Petersburg-Clearwater, FL	1,205.1	829.0	135.1
5	Orlando-Kissimmee-Sanford, FL	1,141.8	817.2	96.2
6	Charlotte-Concord-Gastonia (NC-SC)	1,102.7	675.6	206.5
7	Baltimore-Columbia-Towson, MD	1,082.9	748.0	118.3
8	Jacksonville, FL	664.9	466.4	65.5
9	Virginia Beach-Norfolk-Newport News (VA-NC)	623.9	388.3	110.8
10	Raleigh, NC	618.3	430.8	63.8

EMPLOYMENT STATISTICS

Area	Electrical Contractor Estimate	YOY # Change	YOY % Change	Industrial Employment	YOY # Change	YOY % Change
DISTRICT OF COLUMBIA	2,097	82	4.1	1,000	-	0.0
Washington-Arlington-Alexandria (DC-VA-MD-WV)	21,129	95	0.5	56,033	1,833	3.4
DELAWARE	3,198	264	9.0	24,567	(833)	-3.3
Wilmington, DE-MD-NJ	2,349	178	8.2	18,067	500	2.8
Salisbury, MD-DE	1,231	(9)	-0.7	13,367	(433)	-3.1
Dover, DE	390	26	7.1	4,767	(67)	-1.4
FLORIDA	74,780	2,006	2.8	382,667	10,167	2.7
Miami-Fort Lauderdale-West Palm Beach, FL	18,252	160	0.9	87,600	1,433	1.7
Tampa-St. Petersburg-Clearwater, FL	11,314	373	3.4	67,333	1,233	1.9
Orlando-Kissimmee-Sanford, FL	11,154	563	5.3	47,933	(33)	-0.1
Jacksonville, FL	6,366	433	7.3	32,633	400	1.2
Cape Coral-Fort Myers, FL	4,632	390	9.2	6,600	300	4.8
North Port-Sarasota-Bradenton, FL	3,597	152	4.4	17,033	1,100	6.9
Naples-Immokalee-Marco Island, FL	2,340	113	5.1	5,200	300	6.1
Palm Bay-Melbourne-Titusville, FL	2,197	78	3.7	30,300	1,433	5.0
Lakeland-Winter Haven, FL	2,045	104	5.4	18,067	400	2.3
Deltona-Daytona Beach-Ormond Beach, FL	1,950	134	7.4	11,000	500	4.8
Port St. Lucie, FL	1,785	182	11.4	7,700	467	6.5
Pensacola-Ferry Pass-Brent, FL	1,647	104	6.7	7,067	267	3.9
Ocala, FL	1,161	39	3.5	10,200	767	8.1
Tallahassee, FL	1,118	26	2.4	3,500	133	4.0
Panama City, FL	958	52	5.7	3,200	100	3.2
Crestview-Fort Walton Beach-Destin, FL	923	30	3.4	3,433	-	0.0
Gainesville, FL	841	56	7.2	4,633	200	4.5
Sebastian-Vero Beach, FL	628	56	9.8	2,200	100	4.8
Punta Gorda, FL	594	17	3.0	767	-	0.0

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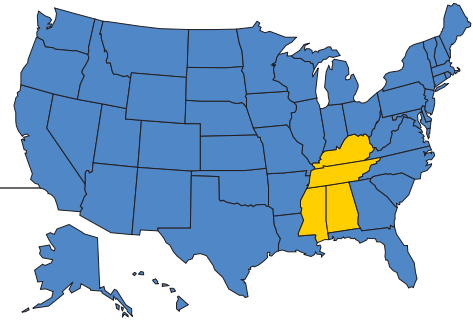
Metro areas are metropolitan statistical areas (MSAs) unless otherwise noted.

All employment data for Construction and Manufacturing is in thousands and represents the percent change in three-month moving averages from July 2021 - Sept. 2021 and July 2020 - Sept. 2020. Source: Current Employment Statistics from the Bureau of Labor Statistics.

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East South Central

Alabama • Kentucky • Mississippi • Tennessee



EMPLOYMENT STATISTICS

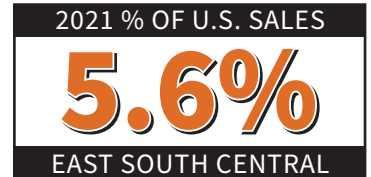
Area	Electrical Contractor Estimate	YOY # Change	YOY % Change	Industrial Employment	YOY # Change	YOY % Change
ALABAMA	11,730	(156)	-1.3	267,267	9,967	3.9
Birmingham-Hoover, AL	3,705	22	0.6	38,200	1,433	3.9
Mobile, AL	1,404	(4)	-0.3	18,100	233	1.3
Huntsville, AL	1,335	95	7.7	27,200	733	2.8
Montgomery, AL	845	13	1.6	17,400	200	1.2
Tuscaloosa, AL	810	(74)	-8.3	18,367	1,133	6.6
Decatur, AL	568	4	0.8	13,300	167	1.3
Florence-Muscle Shoals, AL	490	-	0.0	8,133	(100)	-1.2
Auburn-Opelika, AL	377	13	3.6	6,433	400	6.6
Dothan, AL	338	9	2.6	5,533	500	9.9
Anniston-Oxford-Jacksonville, AL	169	13	8.3	6,867	567	9.0
Gadsden, AL	134	(9)	-6.1	4,433	200	4.7
KENTUCKY	10,877	611	6.0	248,400	12,267	5.2
Lexington-Fayette, KY	1,824	30	1.7	28,467	133	0.5
Bowling Green, KY	477	30	6.8	12,633	133	1.1
Owensboro, KY	286	-	0.0	9,733	900	10.2
Elizabethtown-Fort Knox, KY	264	9	3.4	7,367	(67)	-0.9
Louisville/Jefferson County (KY-IN)	3,675	(30)	-0.8	80,900	2,333	3.0
MISSISSIPPI	5,906	195	3.4	143,133	4,300	3.1
Jackson, MS	1,413	43	3.2	20,767	1,767	9.3
Gulfport-Biloxi-Pascagoula, MS	914	(26)	-2.8	18,000	67	0.4
TENNESSEE	17,515	35	0.2	347,267	10,667	3.2
Nashville-Davidson-Murfreesboro-Franklin, TN	6,470	17	0.3	81,100	1,200	1.5
Knoxville, TN	2,266	(178)	-7.3	43,267	2,433	6.0
Jackson, TN	425	17	4.3	11,400	700	6.5
Johnson City, TN	338	13	4.0	8,267	367	4.6
Cleveland, TN	290	17	6.3	8,667	167	2.0
Morristown, TN	234	(17)	-6.9	12,400	733	6.3
Chattanooga, TN-GA	1,512	74	5.1	34,900	2,067	6.3
Clarksville, TN-KY	490	39	8.7	10,733	(600)	-5.3
Memphis, TN-MS-AR	3,146	56	1.8	44,867	1,867	4.3
Kingsport-Bristol-Bristol (TN-VA)	680	-	0.0	20,667	1,000	5.1

Metro areas are metropolitan statistical areas (MSAs) unless otherwise noted.

All employment data for Construction and Manufacturing is in thousands and represents the percent change in three-month moving averages from July 2021 - Sept. 2021 and July 2020 - Sept. 2020. Source: Current Employment Statistics from the Bureau of Labor Statistics.

Electrical contractor employment is an EW estimate based on internal data and data from the U.S. Bureau of Labor Statistics. Total Electrical Potential is the total of electrical contractor and industrial sales potential, which typically account for at least 75% of a full-line electrical distributor's sales, as well as an estimate for sales to other smaller customer niches.

No surprise to see the Nashville-Davidson-Murfreesboro-Franklin, TN MSA ranked in the U.S. Top 10 for single-family building permits through September with 12,625 permits and a +21% YOY increase. One large project of note in the Nashville area is the 775-acre June Lake mixed-use construction project, now underway in suburban Spring Hill, TN. Its developers say the 20-year project will eventually include 2,900 residential units, 3.9 million sq ft of office space and nearly 1.3 million sq ft of retail and restaurant space and 400 hotel rooms.



Kentucky has two big projects underway in the \$850-million Nucor steel mill in Brandenburg, KY, and a \$840-million VA hospital in Louisville, KY. The state's construction economy will eventually see a major cash infusion from Ford and SK Innovation through their plans for a new battery plant for electric vehicles in Glendale, KY. Expected to start construction in 2025, the \$5.8-billion, 1,500-acre facility may add 5,000 new jobs.

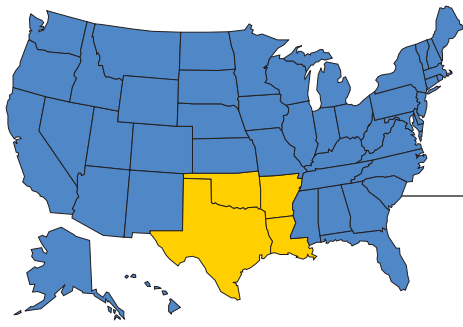
SALES POTENTIAL BY STATE (\$ MILLIONS)

	2021 Total	% of Region	Electrical Contractor \$	Industrial \$ Estimate
EAST SOUTH CENTRAL	6,739.5		3,372.4	2,019.2
ALABAMA	1,744.8	25.9%	859.5	536.4
KENTUCKY	1,619.3	24.0%	796.9	498.5
MISSISSIPPI	900.0	13.4%	432.7	287.3
TENNESSEE	2,475.3	36.7%	1,283.3	697.0

METROS WITH THE MOST SALES POTENTIAL

(in millions of dollars)

Rank	Area	Total \$ Potential	Electrical Contractor \$ Potential	Industrial \$ Potential
1	Nashville-Davidson-Murfreesboro-Franklin, TN	796.0	474.0	162.8
2	Louisville/Jefferson County, KY-IN	539.5	269.2	162.4
3	Birmingham-Hoover, AL	435.2	271.5	76.7
4	Memphis, TN-MS-AR	400.7	230.5	90.0
5	Knoxville, TN	316.1	166.0	86.8
6	Lexington-Fayette, KY	238.5	133.7	57.1
7	Chattanooga, TN-GA	226.1	110.8	70.0
8	Huntsville, AL	190.5	97.8	54.6
9	Jackson, MS	181.5	103.5	41.7
10	Mobile, AL	174.0	102.9	36.3



West South Central

Arkansas • Louisiana • Oklahoma • Texas

While the Oklahoma City, OK MSA and New Orleans, LA MSA are the metros in this region enjoying the largest YOY boosts in nonresidential construction according to Dodge Data & Analytics data (up +58% and +28% YOY, respectively), Texas drives much of this region's electrical economy. When ranked by electrical sales potential, the state has six of the Top 10 metros in the region — Dallas, Houston, Austin, San Antonio, Midland and Beaumont-Port Arthur — and they account for an estimated \$8.7 billion in electrical sales, according to *Electrical Marketing* data. Texas has all sorts of mega-projects underway or planned, including the \$7-billion Hall Park mixed-use megaproject on the drawing boards in Frisco, TX; the \$1.5-billion Diamond Green Diesel refinery underway in Port Arthur, TX; the \$625-million Atkina Solar Power Project now being built in Wharton County, TX; and the \$525-million Azure Sky 350-MW wind farm in Throckmorton, TX.

2021 % OF U.S. SALES
12.4%
 WEST SOUTH CENTRAL

SALES POTENTIAL BY STATE (\$ MILLIONS)

	2021 Total	% of Region	Electrical Contractor \$	Industrial \$ Estimate
WEST SOUTH CENTRAL	14,927.6		9,335.6	2,606.5
ARKANSAS	1,030.4	6.9%	500.7	323.6
LOUISIANA	1,698.9	11.4%	1,107.7	251.3
OKLAHOMA	1,300.7	8.7%	782.0	258.6
TEXAS	10,897.7	73.0%	6,945.2	1,773.0

METROS WITH THE MOST SALES POTENTIAL

(in millions of dollars)

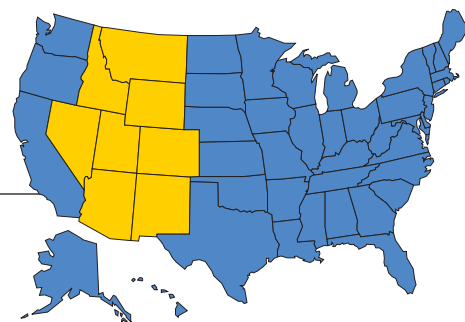
Rank	Area	Total \$ Potential	Electrical Contractor \$ Potential	Industrial \$ Potential
1	Dallas-Fort Worth-Arlington, TX	3,328.0	2,088.2	574.2
2	Houston-The Woodlands-Sugar Land, TX	2,954.4	1,940.2	423.3
3	Austin-Round Rock, TX	1,005.3	674.4	129.9
4	San Antonio-New Braunfels, TX	791.7	528.9	104.4
5	Baton Rouge, LA	567.0	395.0	58.6
6	Oklahoma City, OK	452.5	295.9	66.1
7	Tulsa, OK	437.7	256.5	93.6
8	New Orleans-Metairie, LA	360.4	231.5	56.9
9	Midland, TX	352.4	275.3	6.6
10	Beaumont-Port Arthur, TX	282.1	183.5	42.1

EMPLOYMENT STATISTICS

Area	Electrical Contractor Estimate	YOY # Change	YOY % Change	Industrial Employment	YOY # Change	YOY % Change
ARKANSAS	6,834	(121)	-1.7	161,233	8,467	5.5
Little Rock-North Little Rock-Conway, AR	2,301	(13)	-0.6	19,033	167	0.9
Fayetteville-Springdale-Rogers (AR-MO)	1,824	113	6.6	31,600	1,200	3.9
Fort Smith (AR-OK), AR	745	35	4.9	16,933	433	2.6
LOUISIANA	15,119	126	0.8	125,233	(3,133)	-2.4
Baton Rouge, LA	5,391	390	7.8	29,200	400	1.4
New Orleans-Metairie, LA	3,159	(251)	-7.4	28,333	(267)	-0.9
Lake Charles, LA	1,729	26	1.5	10,333	(67)	-0.6
Lafayette, LA	1,235	56	4.8	13,267	(233)	-1.7
Shreveport-Bossier City, LA	966	(9)	-0.9	9,433	(133)	-1.4
OKLAHOMA	10,673	559	5.5	128,833	833	0.7
Oklahoma City, OK	4,039	(26)	-0.6	32,933	1,767	5.7
Tulsa, OK	3,501	334	10.5	46,633	(2,433)	-5.0
Lawton, OK	199	-	0.0	3,600	133	3.8
TEXAS	94,792	1,131	1.2	883,400	31,033	3.6
Dallas-Fort Worth-Arlington, TX	28,500	390	1.4	286,100	7,100	2.5
Houston-The Woodlands-Sugar Land, TX	26,481	(425)	-1.6	210,900	(300)	-0.1
Austin-Round Rock, TX	9,204	225	2.5	64,733	2,500	4.0
San Antonio-New Braunfels, TX	7,219	(95)	-1.3	52,033	2,900	5.9
Midland, TX	3,757	390	11.6	3,300	167	5.3
Corpus Christi, TX	2,539	74	3.0	7,800	-	0.0
Beaumont-Port Arthur, TX	2,505	429	20.7	21,000	1,333	6.8
El Paso, TX	2,418	130	5.7	16,267	(533)	-3.2
Odessa, TX	1,677	(30)	-1.8	3,700	(67)	-1.8
Longview, TX	1,538	61	4.1	9,433	733	8.4
Lubbock, TX	1,213	74	6.5	4,800	100	2.1
Waco, TX	1,101	69	6.7	15,233	233	1.6
Amarillo, TX	992	(9)	-0.9	14,433	267	1.9
College Station-Bryan, TX	958	48	5.2	5,300	(100)	-1.9
McAllen-Edinburg-Mission, TX	932	(22)	-2.3	6,233	(233)	-3.6
Killeen-Temple, TX	927	26	2.9	7,600	267	3.6
Tyler, TX	789	-	0.0	7,933	1,233	18.4
Abiene, TX	568	(4)	-0.8	3,367	167	5.2
Brownsville-Harlingen, TX	442	-	0.0	5,967	167	2.9
Victoria, TX	412	(35)	-7.8	1,800	(100)	-5.3
San Angelo, TX	407	(9)	-2.1	3,300	233	7.6
Laredo, TX	403	13	3.3	700	-	0.0
Sherman-Denison, TX	390	9	2.3	5,300	100	1.9
Wichita Falls, TX	351	(13)	-3.6	4,500	33	0.7
Texarkana, TX-AR	394	30	8.3	5,567	267	5.0

Mountain

Arizona • Colorado • Idaho • Montana
Nevada • New Mexico • Utah • Wyoming



EMPLOYMENT STATISTICS

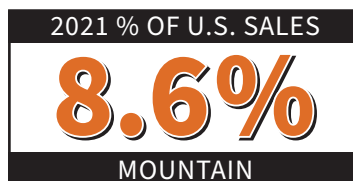
Area	Electrical Contractor Estimate	YOY # Change	YOY % Change	Industrial Employment	YOY # Change	YOY % Change
ARIZONA	22,789	351	1.6	180,467	5,667	3.2
Phoenix-Mesa-Scottsdale, AZ	17,801	403	2.3	136,600	4,767	3.6
Tucson, AZ	2,405	95	4.1	28,300	1,100	4.0
Prescott, AZ	927	87	10.3	3,900	300	8.3
Lake Havasu City-Kingman, AZ	546	52	10.5	3,033	100	3.4
Sierra Vista-Douglas, AZ	485	74	17.9	700	-	0.0
Yuma, AZ	481	35	7.8	2,700	333	14.1
Flagstaff, AZ	364	17	5.0	4,000	200	5.3
COLORADO	22,832	(87)	-0.4	146,533	200	0.1
Denver-Aurora-Lakewood, CO	14,521	490	3.5	69,633	567	0.8
Colorado Springs, CO	2,505	52	2.1	12,100	400	3.4
Greeley, CO	2,119	100	4.9	13,700	133	1.0
Fort Collins, CO	1,530	(4)	-0.3	14,200	400	2.9
Boulder, CO	763	30	4.1	21,267	1,200	6.0
Grand Junction, CO	676	(52)	-7.1	3,100	100	3.3
Pueblo, CO	507	30	6.4	4,267	(133)	-3.0
IDAHO	8,038	481	6.4	67,967	(133)	-0.2
Boise City, ID	4,125	321	8.4	28,000	(600)	-2.1
Coeur d'Alene, ID	875	56	6.9	5,000	33	0.7
Idaho Falls, ID	663	17	2.7	4,933	100	2.1
Pocatello, ID	273	13	5.0	2,400	200	9.1
Lewiston (ID-WA)	212	(9)	-3.9	4,200	100	2.4
MONTANA	4,182	(108)	-2.5	21,633	1,100	5.4
NEW MEXICO	6,379	243	4.0	28,400	1,333	4.9
Albuquerque, NM	3,618	451	14.2	16,133	333	2.1
Las Cruces, NM	472	-	0.0	3,000	200	7.1
Santa Fe, NM	377	(9)	-2.2	800	-	0.0
NEVADA	12,094	(48)	-0.4	60,033	4,767	8.6
Las Vegas-Henderson-Paradise, NV	8,654	(22)	-0.2	24,767	1,333	5.7
Reno, NV	2,323	(121)	-5.0	26,733	2,667	11.1
UTAH	16,241	875	5.7	146,600	11,400	8.4
Salt Lake City, UT	6,990	394	6.0	61,200	3,433	5.9
Provo-Orem, UT	3,688	182	5.2	21,500	1,700	8.6
Ogden-Clearfield, UT	3,033	186	6.5	36,233	1,467	4.2
St. George, UT	1,304	95	7.9	3,967	233	6.3
Logan UT-ID, UT	459	(9)	-1.9	14,233	1,400	10.9
WYOMING	2,730	(147)	-5.1	9,867	400	4.2
Cheyenne, WY	494	4	0.9	1,300	33	2.6
Casper, WY	381	22	6.0	1,567	-	0.0

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For a region that's home to some of the fastest-growing metros in the nation, comparatively few large projects are making news. The Denver-Aurora MSA is enjoying a +17% YOY bump in nonresidential construction to \$1.9 billion, and Colorado is home to one of the larger industrial projects now underway, the \$500-million EVRAZ North America long rail mill. It will be able to make ¼-mile long sections of rail and will eventually employ 300 people. Facebook is building two large data centers in the region, the \$800-million Eastmark Parkway facility in Mesa, AZ, and a \$400-million data center in Albuquerque, NM. Phoenix's 27,534 single-family building permits through Sept. 2021 (+22% YOY) are #3 in the nation, but none of the other large MSAs in this region cracked the Top 10.



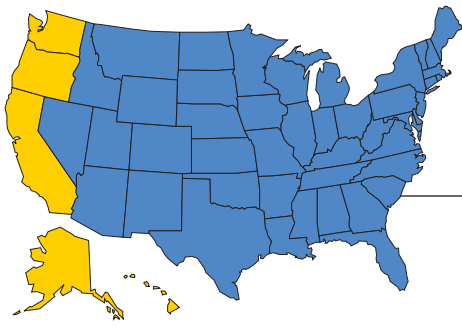
SALES POTENTIAL BY STATE (\$ MILLIONS)

	2021 Total	% of Region	Electrical Contractor \$	Industrial \$ Estimate
MOUNTAIN	10,386.3		6,981.4	1,327.6
ARIZONA	2,539.9	24.5%	1,669.7	362.2
COLORADO	2,458.7	23.7%	1,672.9	294.1
IDAHO	906.7	8.7%	589.0	136.4
MONTANA	437.3	4.2%	306.4	43.4
NEW MEXICO	655.4	6.3%	467.4	57.0
NEVADA	1,258.3	12.1%	886.1	120.5
UTAH	1,855.2	17.9%	1,190.0	294.2
WYOMING	274.8	2.6%	200.0	19.8

METROS WITH THE MOST SALES POTENTIAL

(in millions of dollars)

Rank	Area	Total \$ Potential	Electrical Contractor \$ Potential	Industrial \$ Potential
1	Phoenix-Mesa-Scottsdale, AZ	1,973.0	1,304.3	274.2
2	Denver-Aurora-Lakewood, CO	1,504.6	1,063.9	139.8
3	Las Vegas-Henderson-Paradise, NV	854.7	634.0	49.7
4	Salt Lake City, UT	793.7	512.1	122.8
5	Boise City, ID	448.1	302.3	56.2
6	Provo-Orem, UT	391.7	270.2	43.2
7	Albuquerque, NM	371.9	265.1	32.4
8	Ogden-Clearfield, UT	368.7	222.2	72.7
9	Tucson, AZ	291.3	176.2	56.8
10	Reno, NV	279.8	170.2	53.7



Pacific

Alaska • California • Hawaii • Oregon • Washington

With an estimated 16% of all U.S. electrical sales potential, this region carries a lot of clout. Eight MSAs have more than \$1 billion in electrical sales and six of them are in California. Los Angeles, with \$4.1 billion in estimated sales, and Seattle, with an estimated \$2 billion in sales, are the region's biggest markets for electrical products. Los Angeles had \$6.4 billion in nonresidential construction underway through September, but that's -9% below Sept. 2020, according

to the most recent data available from Dodge Construction & Analytics.

At least four hospital projects worth at least \$1 billion were either underway or on the drawing boards, led by the plans for the \$3.7-billion University of California Davis Health hospital and pavilion near Sacramento and the \$1.6-billion Harbor-UCLA Medical Center's 346-bed tower and outpatient building in Carson, CA.

SALES POTENTIAL BY STATE (\$ MILLIONS)				
	2021 Total	% of Region	Electrical Contractor \$	Industrial \$ Estimate
PACIFIC	19,796.8		12,309.9	3,527.5
ALASKA	265.1	1.3%	176.5	35.6
CALIFORNIA	13,802.5	69.7%	8,485.0	2,556.9
HAWAII	474.0	2.4%	355.9	23.3
OREGON	1,819.5	9.2%	1,079.8	375.8
WASHINGTON	3,435.7	17.4%	2,212.6	535.9

METROS WITH THE MOST SALES POTENTIAL				
<i>(in millions of dollars)</i>				
Rank	Area	Total \$ Potential	Electrical Contractor \$ Potential	Industrial \$ Potential
1	Los Angeles-Long Beach-Anaheim, CA	4,108.2	2,367.6	919.0
2	Seattle-Tacoma-Bellevue, WA	2,023.2	1,298.9	319.7
3	San Francisco-Oakland-Hayward, CA	1,837.0	1,185.2	284.4
4	Riverside-San Bernardino-Ontario, CA	1,518.2	1,031.2	183.4
5	San Diego-Carlsbad, CA	1,334.3	839.8	227.7
6	Portland-Vancouver-Hillsboro (OR-ID)	1,247.0	753.4	244.2
7	Sacramento-Roseville-Arden-Arcade, CA	1,045.4	761.0	75.3
8	San Jose-Sunnyvale-Santa Clara, CA	1,034.0	480.1	347.1
9	Tacoma-Lakewood, WA	354.3	250.5	32.9
10	Urban Honolulu, HI	350.6	262.6	17.9

EMPLOYMENT STATISTICS						
Area	Electrical Contractor Estimate	YOY # Change	YOY % Change	Industrial Employment	YOY # Change	YOY % Change
ALASKA	2,409	65	2.8	17,733	1,733	10.8
Anchorage, AK	1,465	26	1.8	2,433	33	1.4
Fairbanks, AK	377	(26)	-6.5	600	100	20.0
CALIFORNIA	115,808	4,065	3.6	1,274,000	15,733	1.3
Los Angeles-Long Beach-Anaheim, CA	32,314	234	0.7	457,900	3,000	0.7
San Francisco-Oakland-Hayward, CA	16,176	277	1.7	141,700	2,367	1.7
Riverside-San Bernardino-Ontario, CA	14,075	455	3.3	91,367	(1,467)	-1.6
San Diego-Carlsbad, CA	11,462	914	8.7	113,433	267	0.2
Sacramento-Roseville-Arden-Arcade, CA	10,387	1,179	12.8	37,500	1,167	3.2
San Jose-Sunnyvale-Santa Clara, CA	6,552	(182)	-2.7	172,967	3,667	2.2
Fresno, CA	2,600	152	6.2	26,900	233	0.9
Santa Rosa, CA	2,223	117	5.6	22,600	100	0.4
Oxnard-Thousand Oaks-Ventura, CA	2,206	30	1.4	26,633	1,167	4.6
Bakersfield, CA	1,967	13	0.7	12,467	133	1.1
Stockton-Lodi, CA	1,824	126	7.4	22,333	1,400	6.7
Vallejo-Fairfield, CA	1,499	74	5.2	12,400	100	0.8
Modesto, CA	1,391	113	8.8	24,033	1,233	5.4
Santa Maria-Santa Barbara, CA	1,183	43	3.8	11,900	133	1.1
San Luis Obispo-Paso Robles-Arroyo Grande, CA	1,105	13	1.2	8,033	667	9.0
San Rafael, CA Metropolitan Division, CA	1,031	65	6.7	5,467	433	8.6
Salinas, CA	893	82	10.2	4,467	(267)	-5.6
Visalia-Porterville, CA	867	-	0.0	12,633	133	1.1
Redding, CA	624	17	2.9	2,400	(33)	-1.4
Santa Cruz-Watsonville, CA	611	17	2.9	7,000	167	2.4
Napa, CA	568	43	8.3	13,200	(133)	-1.0
Chico, CA	568	26	4.8	4,600	233	5.3
Yuba City, CA	381	17	4.8	2,100	-	0.0
Merced, CA	368	30	9.0	11,333	600	5.6
Madera, CA	273	17	6.8	3,067	-	0.0
El Centro, CA	234	-	0.0	2,400	533	28.6
Hanford-Corcoran, CA	134	13	10.7	5,000	67	1.4
HAWAII	4,858	165	3.5	11,600	200	1.8
Urban Honolulu, HI	3,584	173	5.1	8,933	33	0.4
Kahului-Wailuku-Lahaina, HI	555	4	0.8	900	-	0.0

Metro areas are metropolitan statistical areas (MSAs) unless otherwise noted.

All employment data for Construction and Manufacturing is in thousands and represents the percent change in three-month moving averages from July 2021 - Sept. 2021 and July 2020 - Sept. 2020. Source: Current Employment Statistics from the Bureau of Labor Statistics.

Electrical contractor employment is an EW estimate based on internal data and data from the U.S. Bureau of Labor Statistics. Total Electrical Potential is the total of electrical contractor and industrial sales potential, which typically account for at least 75% of a full-line electrical distributor's sales, as well as an estimate for sales to other smaller customer niches.

EMPLOYMENT STATISTICS

Area	Electrical Contractor Estimate	YOY # Change	YOY % Change	Industrial Employment	YOY # Change	YOY % Change
OHIO	31,178	1,391	4.7	660,533	9,567	1.5
Cincinnati (OH-KY-IN)	6,335	(22)	-0.3	111,533	(1,333)	-1.2
Columbus, OH	6,192	295	5.0	71,667	1,567	2.2
Cleveland-Elyria, OH	5,399	442	8.9	111,600	(1,600)	-1.4
Akron, OH	2,106	156	8.0	37,067	767	2.1
Toledo, OH	2,063	208	11.2	45,833	467	1.0
Dayton, OH	1,933	117	6.4	41,533	1,167	2.9
Youngstown-Warren-Boardman (OH-PA)	1,300	52	4.2	22,600	(67)	-0.3
Canton-Massillon, OH	1,157	65	6.0	25,033	233	0.9
Mansfield, OH	299	13	4.5	9,167	133	1.5
Lima, OH	299	17	6.2	9,000	833	10.2
Weirton-Steubenville, OH	204	4	2.2	4,500	67	1.5
Springfield, OH	169	4	2.6	6,300	-	0.0
WISCONSIN	16,965	(35)	-0.2	481,133	23,867	5.2
Milwaukee-Waukesha-West Allis, WI	4,234	(234)	-5.2	118,433	8,000	7.2
Madison, WI	2,570	178	7.4	38,800	3,367	9.5
Appleton, WI	1,257	43	3.6	24,533	600	2.5
Green Bay, WI	1,179	48	4.2	32,500	1,867	6.1
Oshkosh-Neenah, WI	802	48	6.3	22,467	867	4.0
Eau Claire, WI	546	30	5.9	10,900	500	4.8
Janesville-Beloit, WI	477	22	4.8	10,667	267	2.6
Fond du Lac, WI	468	35	8.0	11,667	900	8.4
Racine, WI	451	26	6.1	17,200	467	2.8
La Crosse-Onalaska (WI-MN)	425	13	3.2	8,500	267	3.2
Wausau, WI, WI	364	13	3.7	18,600	500	2.8
Sheboygan, WI	334	22	6.9	21,633	767	3.7

EMPLOYMENT STATISTICS

Area	Electrical Contractor Estimate	YOY # Change	YOY % Change	Industrial Employment	YOY # Change	YOY % Change
OREGON	14,738	347	2.4	187,233	2,500	1.4
Portland-Vancouver-Hillsboro (OR-ID)	10,283	537	5.5	121,667	1,633	1.4
Salem, OR	1,829	104	6.0	12,467	100	0.8
Eugene, OR	1,010	26	2.6	14,167	333	2.4
Bend-Redmond, OR	971	(26)	-2.6	5,567	167	3.1
Medford, OR	663	48	7.7	7,733	33	0.4
Albany, OR	394	4	1.1	7,900	233	3.0
Corvallis, OR	204	9	4.4	2,900	100	3.6
Grants Pass, OR	173	13	8.1	3,033	133	4.6
WASHINGTON	30,199	1,742	6.1	267,033	(567)	-0.2
Seattle-Tacoma-Bellevue, WA	17,728	1,222	7.4	159,300	(4,667)	-2.8
Tacoma-Lakewood, WA	3,419	130	4.0	16,400	233	1.4
Spokane-Spokane Valley, WA	2,106	69	3.4	17,300	533	3.2
Kennewick-Richland, WA	1,512	152	11.1	8,800	167	1.9
Bellingham, WA	1,105	104	10.4	9,767	500	5.4
Olympia-Tumwater, WA	906	-	0.0	3,100	100	3.3
Bremerton-Silverdale, WA	672	(4)	-0.6	2,800	200	7.7
Mount Vernon-Anacortes, WA	581	22	3.9	6,267	33	0.5
Yakima, WA	550	4	0.8	8,800	567	6.9
Longview, WA	455	(22)	-4.5	6,867	300	4.6
Wenatchee, WA	390	4	1.1	2,467	33	1.4
Walla Walla, WA	165	9	5.6	4,433	333	8.1

EMPLOYMENT STATISTICS

Area	Electrical Contractor Estimate	YOY # Change	YOY % Change	Industrial Employment	YOY # Change	YOY % Change
GEORGIA	26,711	633	2.4	392,133	11,500	3.0
Atlanta-Sandy Springs-Roswell, GA	16,909	321	1.9	167,033	5,200	3.2
Augusta-Richmond County (GA-SC)	2,721	199	7.9	23,033	1,000	4.5
Savannah, GA	1,079	17	1.6	18,267	1,333	7.9
Columbus (GA-AL)	654	43	7.1	10,233	(200)	-1.9
MARYLAND	21,199	104	0.5	109,867	2,300	2.1
Baltimore-Columbia-Towson, MD	10,209	(212)	-2.0	58,933	1,300	2.3
Silver Spring-Frederick-Rockville MD	4,459	117	2.7	18,233	167	0.9
Hagerstown-Martinsburg (MD-WV)	520	(9)	-1.6	9,667	500	5.5
NORTH CAROLINA	31,733	2,045	6.9	470,767	23,200	5.2
Charlotte-Concord-Gastonia (NC-SC)	9,221	351	4.0	102,900	1,233	1.2
Raleigh, NC	5,880	477	8.8	31,800	2,000	6.7
Greensboro-High Point, NC	2,162	91	4.4	50,667	867	1.7
Winston-Salem, NC	1,551	22	1.4	33,467	1,467	4.6
Wilmington, NC	1,317	95	7.8	5,433	300	5.8
Durham-Chapel Hill, NC	1,296	91	7.6	33,733	1,233	3.8
Asheville, NC	1,270	61	5.0	21,867	1,400	6.8
Hickory-Lenoir-Morganton, NC	663	48	7.7	40,733	2,200	5.7
Fayetteville, NC	654	17	2.7	8,267	333	4.2
Burlington, NC	442	22	5.2	8,233	-	0.0
Greenville, NC	416	(22)	-5.0	6,633	167	2.6
Rocky Mount, NC	338	13	4.0	9,233	(600)	-6.1
SOUTH CAROLINA	14,166	784	5.9	249,700	7,633	3.2
Charleston-North Charleston, SC	2,678	13	0.5	28,000	533	1.9
Greenville-Anderson-Mauldin, SC	2,652	165	6.6	56,900	2,333	4.3
Columbia, SC	2,370	182	8.3	31,967	1,033	3.3
Myrtle Beach-Conway-North Myrtle Beach, SC	1,508	130	9.4	4,833	300	6.6
Spartanburg, SC	1,062	87	8.9	37,300	1,633	4.6
VIRGINIA	27,140	715	2.7	237,900	5,367	2.3
Richmond, VA	5,343	169	3.3	30,500	67	0.2
Virginia Beach-Norfolk-Newport News (VA-NC)	5,300	186	3.6	55,200	(1,467)	-2.6
Roanoke, VA	1,148	(30)	-2.6	15,167	267	1.8
Charlottesville, VA	797	61	8.2	4,100	200	5.1
Lynchburg, VA	771	(9)	-1.1	14,333	167	1.2
WEST VIRGINIA	4,143	100	2.5	45,600	1,800	4.1
Huntington-Ashland (WV-KY-OH)	1,010	22	2.2	10,767	433	4.2
Charleston, WV	750	17	2.4	3,000	-	0.0