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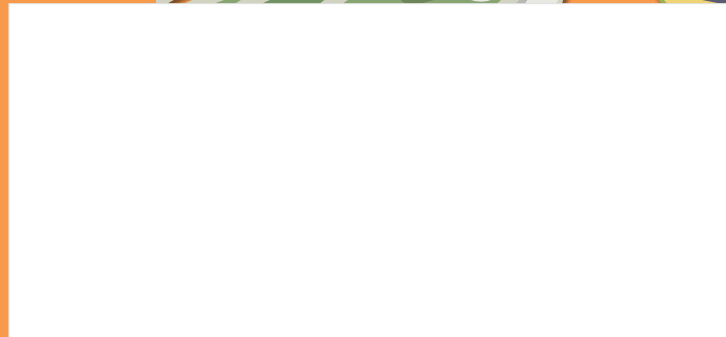
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THE INDEPENDENT
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The 2022 MARKET PLANNING GUIDE

*Will Price
Increases
Gobble Up
Industry Profits?
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FEATURES

14 2022 MARKET PLANNING GUIDE

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

15 2022 NATIONAL MULTIPLIERS

Use these multipliers along with the employment data in the Regional Factbook to develop local sales estimates.

24 REGIONAL FACTBOOK

Use this local, state and regional data to develop sales forecasts for 2022.

34 MAPPING OUT MARKET CLUSTERS

Harnessing cluster economics can help you keep 2022 sales up to 2021 levels.

36 MANAGING YOUR SUPPLY CHAIN

Part 2 of this three-part series digs into the best inventory replenishment strategies.

DEPARTMENTS

4 TIMES & TRENDS

Potholes and Pots of Gold for 2022. Here are EW's picks for the top challenges & business opportunities for 2022.

6 NEWSWATCH

Get a recap of the industry's biggest news.

8 ELECTROSTATS

Monitor the electrical market's key economic indicators.

10 BULLETIN BOARD

Learn about new promotions, company news and more.

39 PEOPLE

Find out who's on the move.

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Potholes & Pots of Gold for 2022

Here are *Electrical Wholesaling's* picks for the top challenges and business opportunities for 2022.

As electrical execs develop their 2022 sales forecasts, they have a new array of market drivers to consider that weren't in the mix this time last year. Here are the drivers that came up most often in conversations during my recent travels to industry events.

Historic price increases for electrical products. The price increases in the electrical market haven't shown any signs of slowing down in recent months. *Electrical Marketing* has published a monthly Electrical Price Index for more than 20 electrical products since 1990, and eight of the 10 largest monthly price increases have occurred over the past two years. No surprise that wire and cable has seen some of the largest increases, with year-over-year variances topping +30% through Oct. 2021. With inflation raging and shortages driving up prices, it's tough to say when prices will return to anything near what we used to consider normal.

Shipments of semiconductors tripped up in supply chain snags.

The delays in chip deliveries make business news headlines every day, and in the electrical industry they are being felt most acutely by manufacturers of industrial and lighting controls and LED lamps that incorporate them into their products. At last month's LightFair, any manufacturer with a direct source of semiconductors, most often from China or other Pacific Rim nations, was very quick to promote that fact to attendees. Some economists

believe supply chain challenges will ease up by the second half of 2022.

The multi-billion dollar question: What will the office construction market look like — post pandemic? Every business is managing the work-from-home and remote office phenomenon differently. But



there's little doubt that once all COVID restrictions are in the rear-view mirror, for many companies the days of most or all employees working five days a week from company offices are over, and that the era of the three days in/two days out will be woven into the fabric of corporate culture. One would think that long term, this would eventually cut down on the need for new office construction, but many construction execs think it will spark demand for renovation to reconfigure existing inventory to meet new work patterns.

The 2022 construction forecasts for office construction are all over the

place, with the Consensus Construction Forecast published annually by the American Institute of Architects (AIA) coming in a -0.1% decline, but the eight construction forecasts offering predictions ranging from a +11.7% increase to a -10.6% decline. Dodge Data & Analytics expects a +10% increase to \$49.7 billion, according to its 2022 Construction Outlook.

Trade shows and conferences are back. Although the number of attendees and exhibitors at the trade shows I recently attended were down from past events, attendees enjoyed re-connecting with old business contacts and making new ones. This industry is still a people business where relationships count.

Helping contractors build new businesses in lighting control. This is a concept that you may want to kick around at your next strategic planning session. There's a ton of chatter right now about how contractors can capitalize on lighting control from lighting manufacturers marketing products that are easy to commission, monitor and upgrade. LEDs still account for a comparatively small fraction of the installed lighting base in commercial and industrial facilities, and the retrofit opportunities for contractors who can install and program these controls will be huge.

EV charging stations for the home. While EV fans are all charged up about the \$7.5 billion that the Biden Infrastructure Bill has carved out to build out a national network of EV charging stations, I think the opportunities in the EV niche will actually be much bigger in the installation of residential EV chargers. Owners will quickly see that being able to charge their EV overnight in their own garage will beat scouting around for an available public EV charger.

That's my take on the biggest opportunities and challenges for 2022. Let me know if I missed any at jlucy@endeavorb2b.com. ■

By Jim Lucy, Chief Editor

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Graybar Electric Acquires Two More Distributors

Graybar Electric Co., St. Louis, recently completed two acquisitions with its purchases of Steven Engineering Inc., South San Francisco, CA, a distributor of automation, motion control and pneumatic solutions, and the St. Louis-based Metro Electric Supply and Metro Lighting, a regional distributor that primarily serves homebuilders and contractors that specialize in residential, commercial and industrial projects.

Steven Engineering was founded in 1975 and has a total of three locations in California and Oregon. As a subsidiary of Graybar, the company will continue to operate under the Steven Engineering name with the same leadership team, employees and suppliers. Bryan Wolfram is the company's CEO. Steven Engineering is ranked in the Top 100 on *EW's* 2021 Top 150 Electrical Distributors ranking, with 115 employees and three locations. Graybar is ranked #3, with approximately \$7.2 billion in North American sales, 8,233 employees and 292 locations. Kathleen Mazzarella, Graybar's chairman, president and CEO, said Steven Engineering will strengthen Graybar's position in the industrial automation business.

Metro Electric Supply, which is also a retailer of lighting products, was founded in 1967 and operates fourteen locations across the St. Louis region, including eight electrical supply locations and six lighting showrooms. As a subsidiary of Graybar, the company will continue to operate under the Metro Electric Supply and Metro Lighting brand with the same employees, leadership team and suppliers. Metro Electric Supply was ranked #122 on *Electrical Wholesaling's* Top 150 ranking.

"In planning for our future, one of our family's top priorities was ensuring Metro would continue to remain locally owned and operated," said Bill Frisella, owner of Metro in the press release.

Graybar Electric Co. has been active in the acquisition game over the past year. Earlier this year it acquired Shingle & Gibb Automation, Moorestown, NJ, and Richmond Electrical Supply, Richmond, KY, through its Cape Electrical Supply business, and Graybar Canada, Halifax, Nova Scotia, acquired Electro-mag, Sherbrooke, Quebec.

The company recently reported some stellar numbers in its 3Q 2021 results. Its net sales totaled \$2.3 billion, a +23.2% gain compared to the same period in 2020.

REXEL BUYS MAYER ELECTRIC SUPPLY

Mayer Electric Supply, Birmingham, AL, the 11th largest full-line electrical distributor in the United States, will become part of the Rexel USA portfolio of companies.

Mayer employs more than 1,200 associates in 68 locations across 12 states, and according to *Electrical Wholesaling's* 2021 Top 150 ranking had \$1,073,628,000 in 2020 sales. The transaction remains subject to regulatory approval and is expected to close before year-end.

James W. "Wes" Smith will continue as president of Mayer under Rexel ownership. "Maintaining the Mayer brand and culture, along-side and as a part of the Rexel brand and culture, will create strategic value for our customers, suppliers, communities, associates and stakeholders," he said in the press release.

"This move is an important step in expanding Rexel's footprint in the United States, the world's leading market for electrical supplies, and will strengthen our market share in the Eastern part of the country," said Jeff Baker, CEO of Rexel USA, in the release.

Rexel's 2020 sales for the United States and Canada were \$5.3 billion according to *EW's* 2021 Top 150 listing, and before the Mayer acquisition the company had 573 locations and more than 7,200 employees in North America. Rexel is ranked #5 on *EW's* Top 150 list and is the second largest distributor in the world after Sonepar, with an es-

timated \$15.4 billion in sales, more than 1,900 locations in 25 countries and more than 24,000 employees. Rexel has acquired dozens of companies in North America over the past 30 years, many of them large regional players. The list includes Platt Electric Supply, Beaverton, OR (2012); Branch Group, Upper Marlboro, MD (2000); Westburne, St. Laurent, Quebec (2000); GE Supply, Shelton, CT (2006); and Capitol Light & Supply (CLS), Hartford, CT (2006).

Mayer Electric has for many years been one of the strongest distributors in the Southeast, but in more recent years expanded its reach into other regions, with acquisitions of The Hite Co., Altoona, PA (2018); Upchurch Electrical Supply, Fayetteville, AR (2017); and Mustang Electric Supply, Lewisville, TX (2012). The company is known for its community and industry involvement and over the years has been a strong supporter of the Industrial Distribution Program at the University of Alabama at Birmingham and the National Association of Electrical Distributors. The university named the business school the Collat School of Business in 2014, to honor Charles and Patsy Collat for their financial support, which included \$25 million in gifts and pledges. Mayer Electric Supply also has the rare distinction of having four of its executives serve as NAED chairman — Wes Smith, Glenn Goedecke, Jim Summerlin and Charles Collat.

GE Current Buys Hubbell's C&I Lighting Business

Hubbell Inc.'s announcement that it would sell its Commercial and Industrial Lighting business to GE Current, a Daintree company, for a cash purchase price of \$350 million, was the talk of the recent LightFair trade show in New York and another example of the consolidation of the lighting industry.

The industry still may not be over the 2019 news that Eaton was selling its Cooper Lighting unit to Signify for approximately \$1.4 billion, seven years after buying Cooper Industries and its lighting business for \$11.8 billion; the 2018 deal where GE sold its Current Powered by GE lighting business to the American Industrial Partners (AIP) private equity firm; or GE's 2020 sale of its Home Lighting business unit to Savant Systems, Hyannis, MA.

The Hubbell Lighting business unit includes a large package of well-known lighting lines, and its sales generated approximately \$515 million in sales in 2020. These lines included include Area Architectural Lighting, Beacon, Litecontrol, Kim, Columbia, Prescolite, Alera, Dual-Lite, Compass, Hubbell Outdoor Lighting and Hubbell Controls. Progress Lighting was not included in the sale because of its residential focus, according a report in *LEDs Magazine*.

GE Current's brands include Albeo, Evolve, Lumination, Arize, Daintree, Forum, Tetra, Trigain, 365DisInFx, Lightgrid and Proline.

"This strategic transaction creates a more focused Hubbell portfolio with higher growth and margin characteristics, and enables us to continue effectively executing on our core strategy of providing reliable and efficient critical infrastructure solutions for Electrical and Utility applications," said Gerben Bakker, chairman, president and CEO, in the press release.

After closing, Current and the Hubbell C&I Lighting business will maintain separate agency networks with dedicated resources and distinct brands, according to press release.

One of the interesting aspects of the sale is that Hubbell's residential lighting assets, including the well-known Progress Lighting brand, was not included. In the *Motley Fool* transcript of Hubbell's 3Q 2021 analysts call, William Sperry, executive VP and CFO, explained the thinking behind the sale: "The businesses are quite different. The C&I business is an integrated one. It has plants. It has an agent front end that goes to the channel and to the projects.

"The residential (business) is a purchase for resale business. There's no manufacturing side to it that we have. And the customers are not the ED (electrical distributor) channel, they are big-box retailers, homebuilders, showrooms and a very vibrant e-commerce channel. So we have been running the businesses differently. Yes, they're both lighting, but they're really not that related."

M&A BRIEFS

Generac Bolsters Smart Grid Offerings

Generac Holdings Inc., Waukesha, WI, acquired Enbala Power Networks Inc., a distributed energy resources technology company to expand its focus on smart grid 2.0 technologies and capitalize on new opportunities as a grid services provider. The Denver-based Enbala is a provider of distributed energy optimization and control software designed to ensure the operational stability of the world's power grids.

The company also acquired ecobee Inc. a provider leader of sustainable smart home solutions, in a transaction valued up to \$770 million contingent on the achievement of certain performance targets. ecobee was founded in 2007 and is headquartered in Toronto, Canada. It has a team of over 500 employees globally and sells several ENERGY STAR-certified thermostats and a suite of home monitoring products.

ABB Builds Out Robotics Business

ABB acquired Codian Robotics B.V., a provider of delta robots, which are used primarily for high-precision pick-and-place applications. Based in Ede, Netherlands, Codian Robotics is a 20-employee robot manufacturer with a product offering that includes a hygienic design line for hygiene-sensitive industries including food and beverage and pharmaceuticals.

While today the majority of robots in the food and beverage industry are not designed for touching food, Codian Robotics' portfolio includes a hygienic design that allows safe, open food processing.

Littelfuse Buys Carling

Littelfuse, Chicago, and Carling Technologies, Plainville, CT, have entered into a definitive agreement for Littelfuse to acquire Carling for \$315 million in cash. Founded in 1920, Carling manufactures switching and circuit protection technologies with a strong global presence in commercial vehicle, marine and datacom/telecom infrastructure markets. The company has annualized sales of approximately \$170 million.

VITAL STATISTICS

CONSTRUCTION

New Construction Put-in-Place (\$ billions, SAAR)

	Sept. '21 ₁	Aug. '21 ₂	Mo. % Change	Sept. '20	YTY % Change
Total Construction	1,573.6	1,582.0	-0.5	1,459.3	7.8
Total Private Construction₁	1,229.9	1,236.1	-0.5	1,107.1	11.1
Residential ₁	773.5	776.8	-0.4	648.3	19.3
New single family	412.7	415.3	-0.6	316.4	30.4
New multifamily	100.0	100.3	-0.3	90.6	10.5
Nonresidential	456.4	459.3	-0.6	458.8	-0.5
Lodging	17.9	18.0	-0.7	26.7	-32.8
Office	70.4	70.3	0.1	72.5	-2.9
Commercial	87.2	87.0	0.2	78.2	11.5
Health care	38.1	38.6	-1.2	36.9	3.3
Educational	15.2	15.2	0	17.3	-12.1
Religious	2.9	2.9	-0.3	3.3	-12.1
Amusement and recreation	11.6	11.6	-0.2	12.6	-7.7
Transportation	14.7	14.8	-0.4	15.5	-4.6
Communication	21.4	21.5	-0.3	22.6	-5
Power	102.7	103.9	-1.2	102.6	0
Electric	79.1	80.4	-1.6	80.0	-1.2
Manufacturing	72.4	73.6	-1.6	69.1	4.7
Public Construction (\$ billions) ₃	343.7	345.9	-0.7	352.2	-2.4
Residential	8.9	9.1	-1.6	9.3	-4.4
Nonresidential	334.8	336.9	-0.6	342.9	-2.4
Office	11.4	11.3	1.2	12.0	-5
Commercial	3.4	3.6	-3.1	4.0	-13.1
Health care	10.0	10.4	-3.6	10.3	-2.7
Educational	80.7	80.0	0.9	85.9	-6
Public safety	10.6	11.1	-4.3	17.3	-38.8
Amusement and recreation	13.0	13.0	0.1	14.3	-9
Transportation	41.4	41.7	-0.7	44.5	-6.9
Power	9.8	9.8	-0.5	6.5	49.6
Highway and street	99.8	100.5	-0.7	93.2	7.1
Sewage and waste disposal	28.0	27.9	0.4	26.3	6.6
Water supply	18.9	19.0	-0.8	18.2	3.9
Conservation and development	6.6	7.3	-8.7	8.8	-24.7
Housing Starts (SAAR)	Oct. '21₂	Sept. '21₂	Mo. % Change	Oct. '20	YTY % Change
Total (thousands of units)	1,520	1,530	-0.7%	1,514	0.4%
Single-family (thousands of units)	1,039	1,081	-3.9%	1,162	-10.6%
Multi-family (thousands)	470	440	6.8%	337	39.5%

EMPLOYMENT WAGE & PRICE STATISTICS

	Mo.	Latest Month	Mo. % Change	Year ago	YTY % Change
Employment, Electrical Contractors (thousands)	SEPT	996.1	0.7	969.5	2.7
Hourly wage, Electrical Contractors (\$) ₄	SEPT	32.29	0.6	30.97	4.3
Copper prices (cents per pound)	OCT	445.12	1.2	305.70	45.6

INDUSTRIAL MARKET

	Mo.	Latest Month	Mo. % Change	Year ago	YTY % Change
Electrical Mfrs' Shipments (\$ millions)	SEPT	3,296	0.0	3,022	9.1
Electrical Mfrs' Inventories (\$ millions SA) ₂	SEPT	6,366	1.2	6,241	2.0
Electrical Mfrs' Inventory-to-Shipments ratio	SEPT	1,931	1.1	2,065	-6.5
Electrical Mfrs' New Orders (\$ millions SA) ₂	SEPT	3,288	1.5	3,036	8.3
Machine Tool Orders (\$ millions)	SEPT	583.09	21.1	358.23	62.8
Industrial Capacity Utilization (percent, SA)	OCT	76.74	1.6 pts.	73.49	4.4 pts.
Purchasing Managers Index (percent)	OCT	60.8	-0.3 pts.	59.3	1.5 pts.

Footnotes: 1 - preliminary; 2 - revised; 3 - includes residential improvements; Z - less than 0.005 percent; SA - seasonally adjusted; SAAR - seasonally adjusted annual rate. **Sources:** Construction Put-in-Place statistics - Department of Commerce; Housing starts - Department of Commerce's Census Bureau; Electrical contractor employment numbers and hourly wage - Department of Labor; Copper prices - *Metals Week*; Electrical manufacturers' shipment data - Department of Commerce; Machine Tool Orders - Association for Manufacturing Technology; Industrial Capacity Utilization - Federal Reserve Board; and Purchasing Managers Index - Institute for Supply Management.

Note: Additional economic data relevant to the electrical industry is available on a bi-weekly basis by subscribing to *Electrical Marketing* newsletter. For subscription information see www.electricalmarketing.com.

NEMA'S EBCI INDEX SLIDE SHARPLY IN OCTOBER

Despite reports of strong demand, supply side problems helped push the EBCI current conditions component to the first sub-50 reading since May 2020, when the electrical industry was just beginning to regain its footing after the pandemic's onset. The nearly 12-point negative shift from 57.7 points in September to 46.2 points in October was driven largely by an increase in the share of responses indicating worse conditions.

The ElectroIndustry Business Conditions Index (EBCI) is a monthly survey of senior executives at electrical manufacturers published by the National Electrical Manufacturers Association (NEMA), Rosslyn, VA. Any score over the 50-point level indicates a greater number of panelists see conditions improving than see them deteriorating.

The majority of respondents continued to note unchanged conditions, but that stable platform eroded slightly this month. The prevailing sentiment was probably best expressed by the comment that, "supplies for products are becoming more difficult to obtain as the year goes on."

The EBCI future conditions index for October remained at 53.8 points. The proportion of responses underlying the overall component measure mirrored September's as well, with a plurality noting expectations for unchanged conditions in six months. Nearly a third of the NEMA executive panel indicated better conditions ahead, helping maintain the moderately positive outlook suggested by a score in the low to mid 50-point range.

Some other electrical indicators were looking better than NEMA's EBCI. Electrical manufacturers' shipments and new orders both showed solid year-over-year increases. In September, shipments were up +9.1% YOY from Sept. 2020 to \$3,296 million, while new orders were up +8.3% to \$3,288 million. Industrial capacity of utilization also showed a nice increase and is up to 76.74, an increase of 4.4 points from Oct. 2020.

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CES Opens Branch in Greenville, NC



City Electric Supply recently opened a branch in Greenville, NC, a college town home to East Carolina University, residential neighborhoods and a thriving local industry. “Every type of customer surrounds us. We have a state university, plenty of industrial plants, and a lot of residential and commercial customers as well,” said Branch Manager Glenn Walston in the release.

Glenn Walston also gets to do his job every day with his son, 22-year-old Michael Walston. Michael got into the electrical wholesaling industry before

graduating from high school and now has more than five years of experience in the industry.

Not only do father and son get to work with each other every day, but this branch also has a special store manager, Danny Boyd, who is well-known in the Greenville area. Boyd has over 20 years of experience in the industry, which includes working with electrical contractors.

“CES was my first choice because I was allowed to keep my core team together. Plus, it’s a large company that still has the

atmosphere of a family-owned, mom-and-pop company. I like that each branch sort of stands on its own,” Glenn Walston said in the press release.

For Glenn Walston, CES came as a new beginning. With over 30 years of experience in the industry, Walston started as a computer programmer for a local supply house. Later, he decided to grow into an operations manager role before deciding to transition into sales. Glenn knew that when he made the move to CES a little over a year ago, that it was the right decision.

This group in Greenville includes a mixture of youthful guys and skilled veterans who are ready to take the store to new heights. “Our employees are what makes this branch unique. We have a combined 65 years of experience in this industry, with a mixture of youthful energy as well as veteran experience, which makes us different from anyone around here,” said Glenn Walston in the release.

When describing goals for the branch, he wants to keep them centered around outstanding customer service, something CES is known for. The willingness to serve others is what sets the foundation for success. “We’re very customer-oriented. You’re not going to walk in the door and not have someone speak to you. We’re going to greet you even if we can’t wait on you right away,” he added.

Got an Item for Bulletin Board?

It’s easy to have your company included in the pages of *Electrical Wholesaling’s* Bulletin Board. It’s as simple as submitting a description and photographs.

Some of the subjects covered in Bulletin Board include:

- Charitable Events/Donations
- Industry Awards/Recognitions
- Distributor Support/Training
- Product Promotions
- Contests
- Ground Breakings

Send pertinent information to Ellie Coggins, Associate Editor, 10955 Lowell Ave., 7th Floor, Overland Park, KS 66209. Or you may e-mail information to ecoggins@endeavorb2b.com. All electronic photos should be in “jpg,” “tif” or “eps” format at no less than 300 dots per inch. Questions? Call (848) 205-1998.

Atlantic Coast Electric Supply Holds Employee Appreciation Picnic

Atlantic Coast Electric Supply (ACES), headquartered in Summerville, SC, recently held its first annual Charleston, SC, area employee appreciation picnic. Approximately 75 people, including their families, attended the event at the North Charleston Wannamaker Park, located on University Boulevard on Oct. 30.

Casey Getz, vice president of ACES and responsible for the Charleston and Summerville geographic market, said in the release, “We’re here to have fun, and looking around today, obviously this event has been a tremendous success. There is a more important reason we’re doing this. We wanted to show appreciation to those people that have made our success in this market possible. We don’t just employ people; we have a responsibility as a company to develop our team both as a group and individuals. We wanted to send a strong message of gratitude, especially to the families that depend on us for a good living and a great place to work.”

John Marshall, president and owner of ACES, said he was so proud of this event that he struggled to find the words to express his appreciation to the ACES team that put this together and made it possible.



Team K/E Moves Into Location in Record Time

K/E Electric Supply, Mount Clemens, MI, held a grand re-opening of its Brighton location on Nov. 3. Company employees (affectionately known as Team-K/E) moved the Brighton branch inventory, all shelving and offices equipment into the new location in less than thirty-six hours. Two-dozen employees worked long hard hours on Friday, Sept. 24.

Roughly 18 employees worked Saturday to complete the move. About a dozen of the Saturday workers stayed overnight in hotels Friday, shortening their drive to the move. Customers were serviced until 9:00 a.m. on Friday morning from the prior location. On Monday, the new Brighton location was ready for business, with a little dust.

At the grand re-opening, branch manager Jerry Indra thanked his coworkers for their extra efforts in supporting the move to “his” new location, which he calls “The Biggest Little Branch of Team-K/E”. The new Brighton location has ample acreage to expand on, while being strategically located on a major roadway, adjacent to a popular freeway exit.

In the last twelve years, K/E Electric Supply has relocated all of its three branches, opting for superior locations and facilities. Most recently (in April 2019), the Port Huron Branch was relocated on essentially the same time table. The company continues to “reevaluate everything” regularly. President/CEO Rock Kuchenmeister says that too often making internal warehouse or operational changes at companies set in their ways “cooks like Jello. Sometimes you need to mix a little oil and vinegar, then turn the heat up to get the right recipe,” he says.

Shareholder Ryan Kuchenmeister took to the lead on this project, coordinating with contractors to satisfy the needs and requests of the board. His brothers (and partners) Rhandi and Rocky stepped up to the plate whenever needed on this project, while simultaneously leading other special projects of their own. Meanwhile, their father Rock continues to work on “the big project,” hoping to release some press announcements in 2022.

INDUSTRY EVENTS

Dec. 8-9, 2021

UPPER MIDWEST ELECTRICAL EXPO

Minneapolis; North Central
Electrical League (NCEL); www.ncel.org

December 14-16, 2021

NAED WOMEN IN INDUSTRY FORUM

San Antonio; www.naed.org

December 15-17, 2021

LEAD CONFERENCE NAED

San Antonio; www.naed.org

Jan. 17-19, 2022

NAED WESTERN CONFERENCE

Palm Desert, CA;
www.naed.org

Feb. 2-4, 2022

NEMRA ANNUAL CONFERENCE

National Electrical Manufacturers
Representatives Association (NEMRA)
Dallas; www.nemra.org

Feb. 21-23, 2022

NAED SOUTH

Central Conference
Phoenix; www.naed.org

Mar. 7-9, 2022

IDEA E-BIZ

Dulles, VA; www.idea4industry.org

Mar. 30-31, 2022

ELECTRO EXPO

Cleveland; Electrical League of Ohio
www.electricalleague.com

April 21-23, 2022

AHTD SPRING MEETING

Ponte Verdra, FL; Association of High
Technology Distribution; www.ahtd.org



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Service Wire Offering Scholarships to Local College Students & Employees

Service Wire Co., Culloden WV, will be partnering with local colleges in each of the company's three home states and enhancing its internal educational programs.

"I am pleased to share that we will be rolling out a new Workforce Development Program with five local educational facilities in Phoenix, Houston and Huntington, West Virginia," Louis Weisberg, president and CEO said in the press release. "This new program will offer students the opportunity to enhance their skills and partner with our company for continued success after graduation."

The pilot program will launch with San Jacinto College in Houston in conjunction with the company's new manufacturing and distribution facility. Service Wire will award scholarships to San Jacinto College students for the 2021-2022 and 2022-2023 academic years. Scholarships will also be awarded to students at Texas Southern University's Jesse H. Jones School of Business.

In Phoenix, Service Wire Co. will be partnering with Maricopa County College and Western Maricopa Education Center and will provide additional scholarships for the 2021-2022 and 2022-2023 academic years. In Huntington, WV, the company is a sponsor of Marshall University's new Transformative Sales & Service Excellence Center. This new facility aims to prepare students for a career in sales through relevant curriculum, solving real-world challenges, and networking with corporate partners.

The company also offers scholarship and educational opportunities for children of employees, according to Shane Berry, Service Wire's human resources director. The third leg of the company's education initiative includes a new online learning program called Outschool. This resource offers grade school students access to year-round academic and extracurricular activities.



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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 Delagrang, 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.

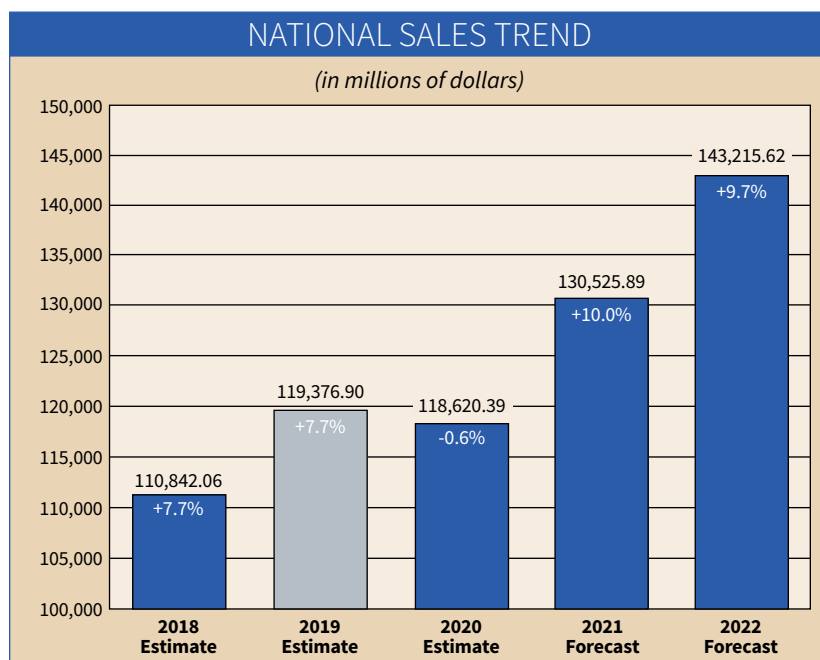
A new array of economic concerns must be factored into everyone's 2022 forecast. First, the good news for those who like to walk on the sunny side of the street. Thankfully, we have a better handle on COVID-19 today than we did 12 months ago, and more electrical contractors and other customers are cool 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.

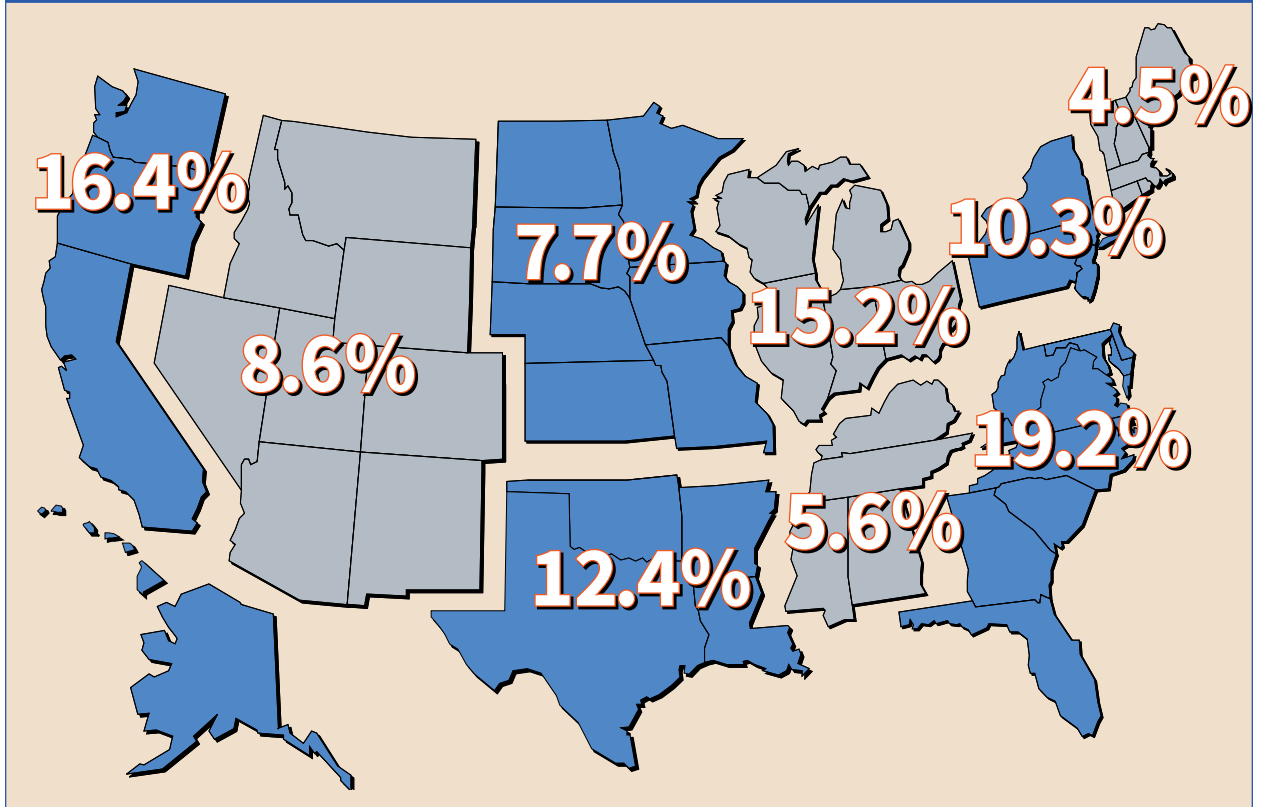
Yet 2022 is in some ways even more difficult to forecast than 2021. Historic double-digit, year-over-year price increases for all sorts of electrical products have sent shockwaves up and down the supply chain and don't seem likely to calm down in the short-term. All channel partners and end-use customers 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)

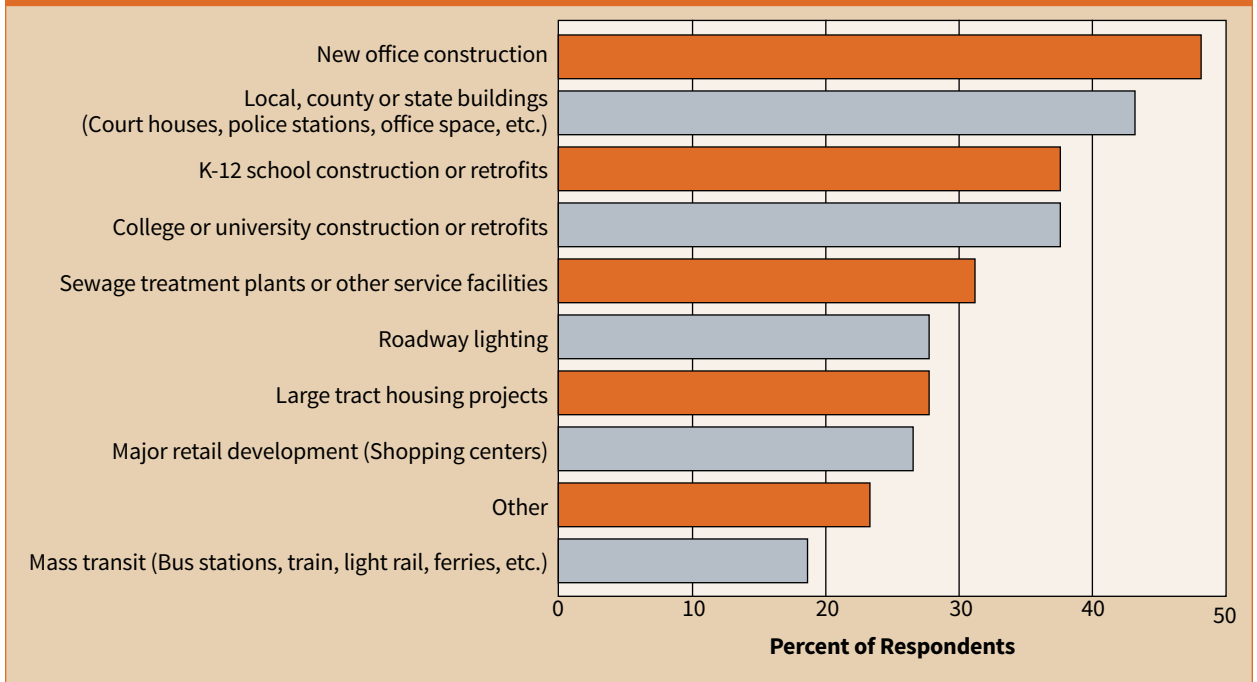
NATIONAL SALES-PER-EMPLOYEE

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.

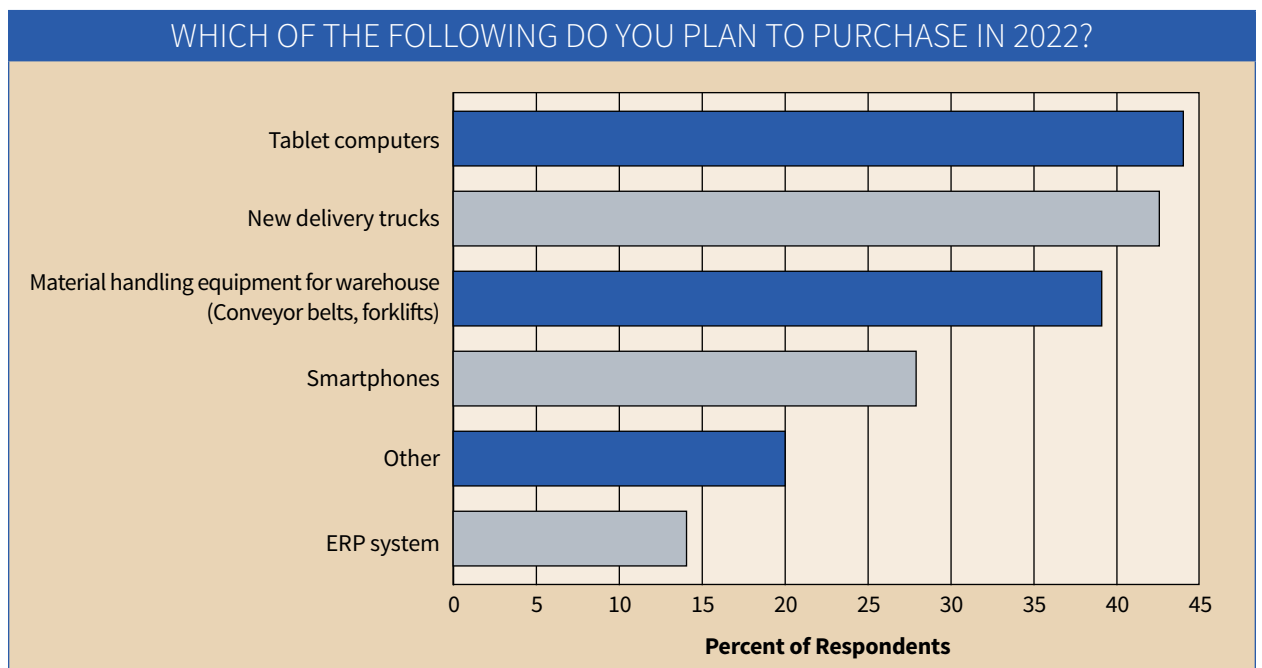
At two new EV battery plants, Ford and SK Innovation plan to invest \$11.4 billion and create a total of 11,000 new jobs in Stanton, TN, and Glendale, KY. Production of the new electric vehicles and advanced lithium-ion batteries will begin in 2025.

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



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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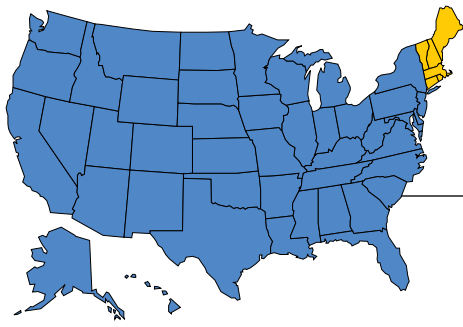
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New England

Connecticut • Maine • Massachusetts
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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

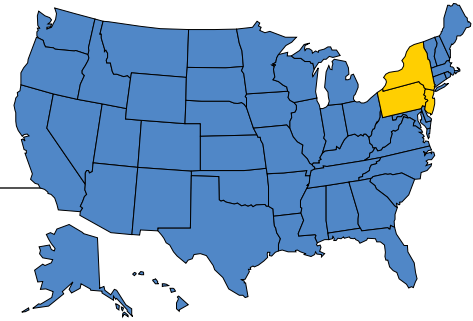
Metro areas are metropolitan statistical areas (MSAs) unless otherwise noted.

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

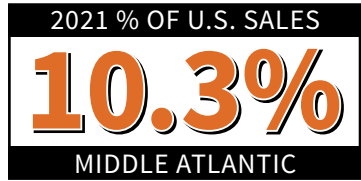
New Jersey • New York • Pennsylvania



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.

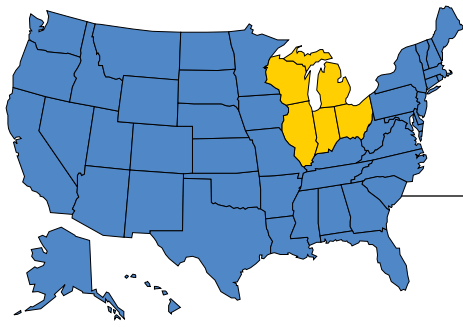
SALES POTENTIAL BY STATE (\$ MILLIONS)

	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

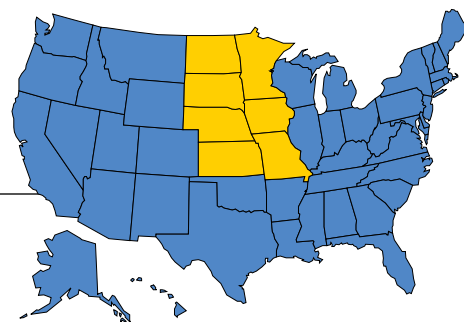
EMPLOYMENT STATISTICS

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

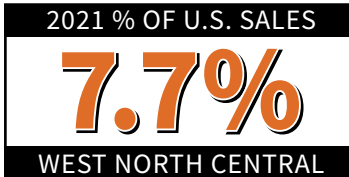
Area	Electrical Contractor Estimate	YOY # Change	YOY % Change	Industrial Employment	YOY # Change	YOY % Change
IOWA	10,578	91	0.9	223,767	9,567	4.5
Des Moines-West Des Moines, IA	2,929	143	5.1	20,967	733	3.6
Davenport-Moline-Rock Island (IA-IL)	1,417	121	9.4	23,267	1,200	5.4
Cedar Rapids, IA	1,088	17	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

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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.



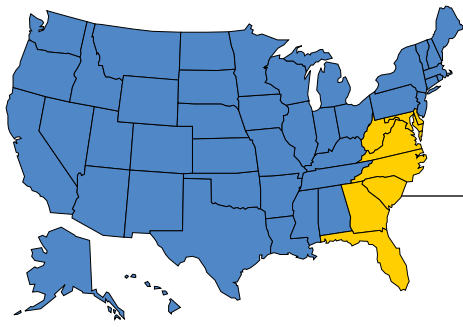
SALES POTENTIAL BY STATE (\$ MILLIONS)

	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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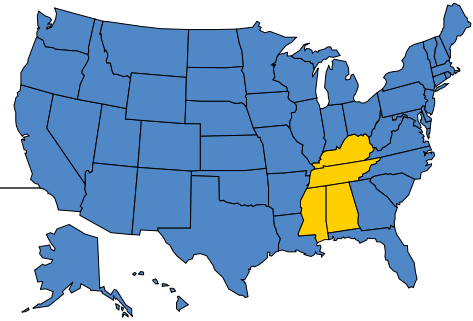
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East South Central

Alabama • Kentucky • Mississippi • Tennessee



EMPLOYMENT STATISTICS

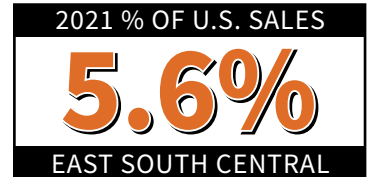
Area	Electrical Contractor Estimate	YOY # Change	YOY % Change	Industrial Employment	YOY # Change	YOY % Change
ALABAMA	11,730	(156)	-1.3	267,267	9,967	3.9
Birmingham-Hoover, AL	3,705	22	0.6	38,200	1,433	3.9
Mobile, AL	1,404	(4)	-0.3	18,100	233	1.3
Huntsville, AL	1,335	95	7.7	27,200	733	2.8
Montgomery, 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.

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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.

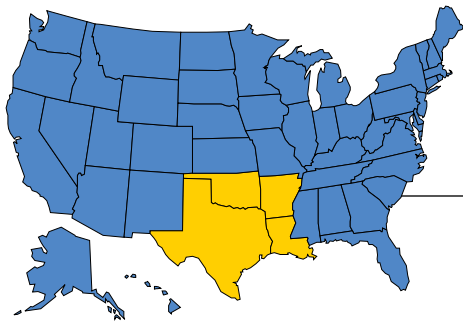
SALES POTENTIAL BY STATE (\$ MILLIONS)

	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

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
Abilene, 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

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

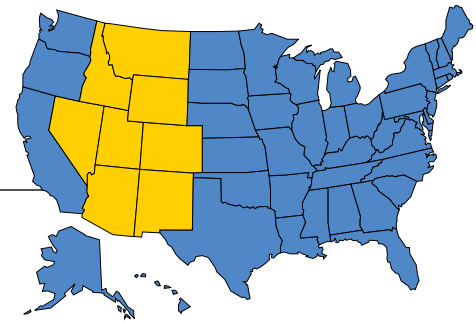
METROS WITH THE MOST SALES POTENTIAL

(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

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

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.

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.

2021 % OF U.S. SALES

8.6%

MOUNTAIN

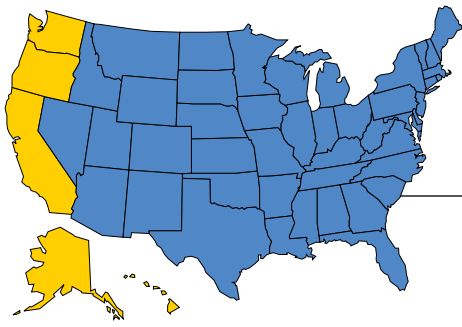
SALES POTENTIAL BY STATE (\$ MILLIONS)

	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

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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

MAPPING OUT MARKET CLUSTERS

Harnessing the power of cluster economics can help you keep 2022 sales up to 2021 levels.

Looking at the economics around us is important to our success. Geographic trading areas with a series of businesses in related segments are called economic clusters. An example of an economic cluster can be found in the Michigan automotive market. Not only are there the automotive manufacturers themselves, but also a series of related businesses such as metal fabrication, robotic and automation suppliers, transportation, paint dealers and parts suppliers from electronics to seat belts.

A terrific tool to identify clusters of manufacturing is available from www.clustermapping.us, an online resource developed and maintained by the Institute for Strategy and Competitiveness at Harvard Business School. It gives a snapshot of clustering and how to consider related businesses. The website also provides a drillable view of related clusters that you can click through.

Why is this important? You should look at clustering and industry-related businesses and sectors because these clusters bring together technology, information and skills that are already engaged to a large extent with some facet of the cluster. We can use existing relationships, skills, products and market knowledge to set the path for developing additional meaningful and profitable relationships specific to an industry.

As we know, it's not easy to develop new customers. However, understanding how to leverage existing relationships

By Christian Sokoll



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A terrific tool to pinpoint clusters of manufacturing in different cities is available from www.clustermapping.us, an online resource which was developed and is maintained by Institute for Strategy and Competitiveness at Harvard Business School. For example, think about the cluster of oil & gas business in west Texas; data center construction in the Omaha, NE, market; or amusements, casinos and small airlines in Las Vegas.

to build new customer bridges creates a straightforward roadmap to success. Let's look at the chemical market broken out by the North American Industry Classification System (NAICS) in **Figure 1**. If I have a couple of great customers manufacturing petrochemicals buying explosion-resistant boxes, motors and controllers, specialty lighting and safety equipment, it makes sense that identifying other companies in this same cluster may offer similar opportunities for products and services.

How do I identify a cluster? It all starts with some thought. Let's say I have a customer who builds utility trailers. I stock automotive wire, connectors and lights for their OEM application. They

also buy some shop supplies, tools and test equipment. My sales representative knows the customer well and speaks their industry language. Thinking through a cluster of similar companies and related industries leads to boat trailers, motorcycle trailers, semi-trailers, livestock trailers, motor homes, campers and specialty trailers. Looking up the NAICS codes is a quick Google search away. The NAICS code is the key to unlocking the names, addresses and phone numbers of these cluster opportunities. Once the NAICS code is identified, lead lists can be purchased from other sources such as Dun & Bradstreet, providing salespeople a path to success with businesses interested in related products and services.

Economic clusters can be either local or traded. Traded clusters are those concentrated in a geographic area that provide products across the nation or globe. Local clusters are related businesses in regional areas that support their communities. Both services and manufacturing can fit into local or traded clusters.

Much work has been done on economic clusters and cluster mapping and definitions. Harvard Business School has done some great work, as has the National Bureau of Economic Research. These are valuable tools that can be used free of charge by you or your marketing team. In their work “Defining Clusters of Related Industries,” Delgado et al. say, “Clusters are geographic concentrations

of industries related by knowledge, skills, inputs, demand and/or other linkages. A growing body of empirical literature has shown the positive impact of clusters on regional and industry performance, including job creation, patenting and new business formation. There is an increasing need for cluster-based data to support research, facilitate comparisons of clusters across regions, and support policy makers and practitioners in defining regional strategies” (www.nber.org/papers/w20375).

As an industry, we are part of the lighting and electrical equipment cluster (See **Figure 2**). This table was developed by Delgado and other researchers at www.clustermapping.us and the Institute for

Strategy and Competitiveness at Harvard Business School. It’s a pretty complete look at the electrical manufacturing industry at a high level.

As you plan for 2022, think about clustered industries and how you can leverage them for growth opportunities in your business. Coming off a stellar 2021, the expectations for 2022 are a high bar. We need to use all the tools at our disposal to create and realize opportunity. ■

Christian Sokoll is president of DISC Corp., Houston, the electrical market’s leading provider of sales forecasts and related market data. He can be reached at chris@disccorp.com or 346-339-7528.

FIGURE 1 — AN EXAMPLE OF CLUSTERS IN THE CHEMICAL MARKET

NAICS	NAICS Name	Subcluster Name
325110	Petrochemical Manufacturing	Organic Chemicals
325191	Gum & Wood Chemical Manufacturing	Organic Chemicals
325193	Cycle Crude & Intermediate Manufacturing	Organic Chemicals
325193	Ethyl Alcohol Manufacturing	Organic Chemicals
325199	All Other Basic Organic Chemical Manufacturing	Organic Chemicals
325212	Synthetic Rubber Manufacturing	Organic Chemicals
325181	Alkalies & Chlorine Manufacturing	Inorganic Chemicals
325182	Carbon Black Manufacturing	Inorganic Chemicals
325188	All Other Basic Organic Chemical Manufacturing	Inorganic Chemicals
325120	Industrial Gas Manufacturing	Inorganic Chemicals
325312	Phosphatic Fertilizer Manufacturing	Agricultural Chemicals
325320	Pesticide & Other Agricultural Chemical Manufacturing	Agricultural Chemicals

FIGURE 2 — LIGHTING & ELECTRICAL EQUIPMENT CLUSTER

NAICS	NAICS Name	Subcluster Name
335110	Electric Lamp Bulb & Part Manufacturing	Lighting Fixture & Parts
335121	Residential Electric Lighting Fixture Manufacturing	Lighting Fixture & Parts
335122	Commercial, Industrial & Institutional Electric Lighting Fixture Mfg.	Lighting Fixture & Parts
335129	Other Lighting Equipment Manufacturing	Lighting Fixture & Parts
335311	Power, Distribution & Specialty Transformer Manufacturing	Electrical Equipment
335312	Motor and Generator Manufacturing	Electrical Equipment
335313	Switchgear & Switchboard Apparatus Manufacturing	Electrical Equipment
335314	Relay and Industrial Control Manufacturing	Electrical Equipment
335921	Fiber Optic Cable Manufacturing	Electrical Components
335929	Other Communications & Energy Wire Manufacturing	Electrical Components
335931	Current-Carrying Wiring Device Manufacturing	Electrical Components
335932	Noncurrent-Carrying Wiring Device Manufacturing	Electrical Components
335991	Carbon & Graphite Product Manufacturing	Electrical Components
335999	All Other Miscellaneous Electrical Equipment & Component Manufacturing	Electrical Components
335911	Storage Battery Manufacturing	Storage Batteries



MANAGING YOUR SUPPLY CHAIN — PART 2

Part 1 of this three-part article explored how distributors can use inventory optimization to pump up profits and increase service levels. This article digs into the best inventory replenishment strategies.

A “hub & spoke” distribution network can have some major pitfalls. One is typically a lack of true network optimization because stocking and replenishment strategies are applied to one echelon without regard to the other(s) (See Fig. 1 and Fig. 2). Another pitfall is the reliance on demand forecasting and its inherent variability. There are some potential negative consequences, such as excess inventory in the form of redundant safety stocks at both hub-and-spoke. I have also seen stock-outs at a spoke even though adequate inventory exists in the distribution

By Howard Coleman

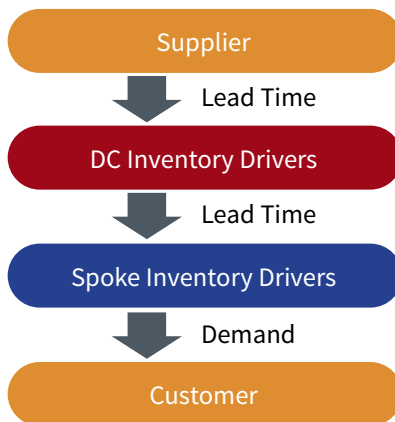


Fig. 1.

network, and the distributor thought the service between DC (distribution center) and spoke was acceptable. MCA

Associates have also seen variances in what distributors order and the actual demand, due to demand variability.

In the typical hub-and-spoke system, replenishment decisions between the DC and its external supplier use order strategies that depend on its internal cost factors such as carrying inventory, but in particular, the supplier’s ordering constraints — pricing, discounts, freight, rebates, etc. That means order replenishment quantities depend on a combination of internal and external factors:

- Demand – the rate of product flow out of the DC
- Demand variation – fluctuation in the rate of product flow out of the DC, from one period to the next

- Lead time – time between ordering product and having it available to fill demand

- Lead time variation – fluctuation of the lead time, from replenishment order to replenishment order

- Replenishment review frequency – the frequency that the DC’s inventory position is checked to see if a new replenishment order is needed

- Replenishment order strategy – the DC’s supply objective, a trade-off between carrying inventory, transportation and purchase cost

- Service level goal — the DC’s service commitment to its internal and its own external end-use customers

- Inventory position — the DC’s available stock (on-hand, on-order, backorders, commitments)

The relationship between the DC and the spoke depends on the spoke’s own demand forecast, order frequencies (related to stock-transfer frequency), safety stock protection and other ordering rules that may have a bearing on the spoke’s replenishment order quantities. Some issues emerge here:

- The appropriate “measure of demand” signaled to the DC, from the spoke, and how should it be forecast

- Accounting for demand variation

- The effect of larger-than-necessary replenishment orders from the supplier to the DC and their impact on the overall supply chain strategy

- The optimal service level goal between the DC and its “customers” — the spokes

- Factoring in the spoke’s inventory position into the DC’s replenishment decisions

- Replenishment review frequency and the DC’s service level goals impact inventory and service levels at the spoke

- When there’s a limited supply of product at the DC, the strategies for product allocation to the spoke

- Customer expectations for the same service level from the DC, when the DC is servicing its own “end use customers”

- The role that the DC’s external supplier’s lead time and lead time

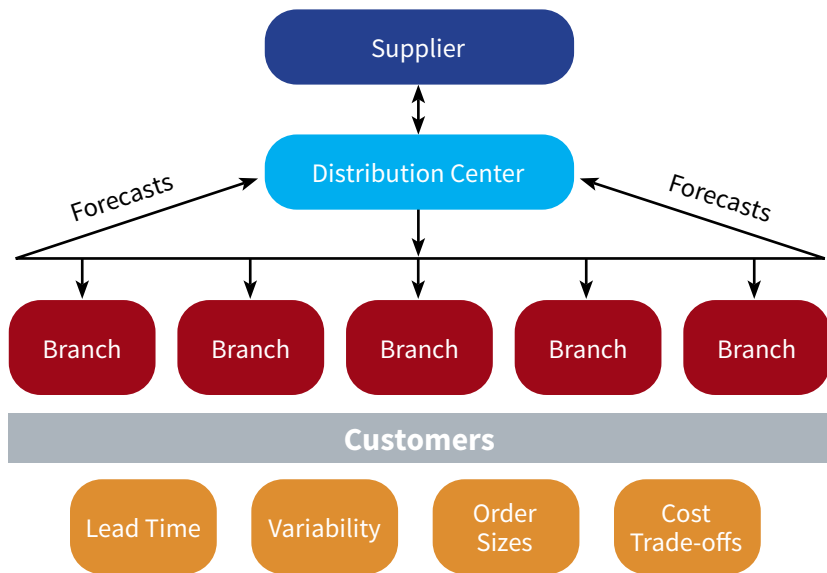


Fig. 2.

variation play in the spoke’s replenishment strategy

These are all important considerations. There is often a “split” in replenishment approaches, kind of like a sequential approach — one for the DC and one for the spoke. Let’s look at some of the problems this split poses.

Lack of visibility up the demand chain. When a spoke seeks to replenish itself, it’s blind to suppliers beyond the DC. The spoke ignores any lead-times other than its own — the lead time from the DC. The spoke may also assume that the DC will completely fill its replenishment orders each and every time. And depending on your ERP system, the spoke may not have any visibility into the DC’s inventory balances.

Lack of visibility down the demand chain. Similar to the case above, when the DC seeks to replenish itself, it may be oblivious to customer demands beyond those of individual spokes and/or have no visibility into the spoke’s inventory balances.

Demand distortion. Because the DC and spoke create independent demand forecasts (based on their own immediate “customer’s” demands), distortions in demand and peaks and valleys often result in too much inventory at the DC.

Total distribution network costs.

If one or more of the spoke’s inventory drivers are modified, the cost implications may be readily apparent at the spoke, but not readily visible to the DC. The impact becomes strictly focused on one single echelon.

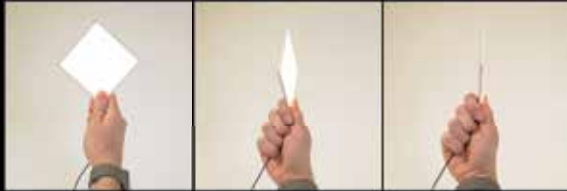
No linkage between safety stocks. The DC and each spoke protect themselves independently, so any desire to optimally balance inventory is made more problematic. This lack of cohesiveness is caused by independent decisions as to how inventory will be managed, either at the DC or spoke.

In the third part of this series, we will explore the difference between “push” and “pull” inventory management strategies. The series is available in its entirety in a digital format at www.ewweb.com. ■

Howard Coleman and his team at MCA Associates help distributors and manufacturers implement continuous improvement solutions focused on business process re-engineering, inventory and supply chain management, sales development and revenue generation, information systems and technology, organizational assessment and development. MCA Associates may be contacted at 203-732-0603, or by email at hcoleman@mcaassociates.com.

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ad index

Advertiser	Page No.
Champion Fiberglass, Inc.....	BC
ECM Free Subscription.....	23
Electrical Marketing.....	IBC
EW Free Subscription.....	13
EW Podcast Series.....	9
Intermatic, Inc.	3, 5
Leviton Manufacturing, Co.....	IFC

This index is a service to our readers. Every effort is made to maintain accuracy, but *Electrical Wholesaling* cannot assume responsibility for errors or omissions.

Summit Electric Supply (Albuquerque, NM): **Ed Gerber**, a distribution industry veteran and member of the company's board of directors for the past few years, has been appointed president and chief executive officer.



Gerber

AHTD Association for High Technology Distribution (AHTD) (Waukesha, WI): **Kerry Cooper**, president of C&E Advanced Technologies, finished his two-year term as president, and AHTD's new president, **Paul Burk**, Steven Engineering's president, is taking office for 2022-2023. **Adam Jackson**, regional vice president at Power/mation, joined the board of directors. **Alan Watson** of Lakewood Automation is now on the AHTD executive committee.

Hammond Power Solutions (HPS) (Baraboo, WI): **Dan Davis** was appointed power quality sales manager. He comes to HPS with 20 years of sales management experience.



Davis

Electrical Trends (Raleigh, NC): **Linda Longo**, the editor of *enLIGHTenment* magazine, will be contributing to lighting content and observations on a regular basis to *Electrical Trends* readers as part of its expanded coverage of the lighting space.

Electri-Flex Co. (Roselle, IL): **Jason W. Kinander**, CEO, won the 2021 Gold Medal Award from the Chicagoland Electric Association (CEA). The award was presented at the CEA's Annual Membership Awards Dinner on Oct. 14.

Rockwell Automation (Milwaukee, WI): **Veena Lakkundi** joined the company as senior VP-corporate strategy and development on Nov. 1. She will report to Rockwell Automation Chairman and CEO Blake Moret. Lakkundi succeeds **Elik Fooks**, senior VP, corporate development, who announced his retirement earlier this year.



Lakkundi

Service Wire (Culloden, WV): **Shawn O'Brien** has joined the Service Wire team as a sales representative in the Culloden sales office and will be serving commercial and industrial distributors, contractors and engineers while working with manufacturers' representatives in Georgia and Alabama.



O'Brien

American Clean Power Association (ACP) (Washington, DC): ACP recently announced that **Josh Kaplowitz** will assume the newly created role of vice president for offshore wind, effective as of November 8.

Crescent Electric Supply (East Dubuque, IL): **Edwin Ojeda** joined CESCO as senior vice president of Industrial and will manage the company's industrial sales growth nationwide. He also is leading the development and deployment of a standardized sales process and support team, creating greater consistency and an enhanced solution-driven approach to working with customers.



Ojeda

OBITUARY

Vern Weber, formerly president and CEO of Standard Electric Co., Saginaw, MI, passed away on Oct. 15 at the age of 85. According to his obituary at www.tributearchive.com, Weber joined Standard Electric Co. in 1963 to open and manage the company's Bay City, MI, location. He was promoted to Saginaw district sales manager, district manager, vice president and president in 1988 and served as the president and CEO at the Saginaw headquarters until his retirement in 2017 at the age of 80 after 54 years of service with the company. Under Weber's leadership, the company grew from three to 30 branch locations throughout Michigan and Indiana.

Weber is survived by his wife, Yvonne, and four children: Bonnie Weber (Lyle Visser), Wendie (Dr. Sam) Bander, Kevin Weber, and Todd (Lupe) Herhold; seven grandchildren; and seven great-grandchildren.

Cerrowire (Hartselle, AL): **TJ O'Connell** joined Cerrowire as director of contractor solutions.



O'Connell

Dakota Supply Group (DSG) (Plymouth, MN): **Rory Troff** has joined Dakota Supply Group as corporate segment manager for the company's Communications/Broadband segment.

Touché Lighting Control (Fort Wayne, IN): **John Arbaugh** joined the firm as region sales engineer for Texas, according to a post on LinkedIn.

Sonepar (Charleston, SC): **Matt Weber** has been promoted to president of OneSource Distributors from his current position as VP of Contractor Sales, effective immediately.



Weber

Ruselectric/Siemens (Hingham, MA): In his new role as head of strategy, **Don Bachman** will focus on the creation and execution of key strategic initiatives around the company's overall business plans as well as broader Siemens' solutions.

Womack Electric Supply (Greenville, NC): **Greg Bullock**, former Womack creative brand specialist, has been appointed director of marketing communications. In this role, Bullock will be responsible for collaborating with internal and external stakeholders to develop, manage and direct Womack's strategic marketing plan and promotional initiatives across digital and traditional channels. **Layne Cahill**, Womack marketing associate, will assist Bullock in this role, providing support for the planning and execution of marketing activities and other administrative departmental functions.



Bullock

Womack Electric Supply Co. is a subsidiary of Crescent Electric Supply Co. headquartered in Danville, VA. It has 18 branch locations in North Carolina and Virginia.

ABB (Atlanta): **Dave Henrichs** is now senior VP of Sales for the Commercial, Industrial & OEM (CIO) U.S.-West Region. He will be responsible for the sales of products, system and services for the Electrification business.

Henrichs succeeds **Deni Miller** who was recently named senior VP-Installation Product Sales, Electrification U.S. after leading the Midwest district through the ABB/GE Industrial integration. He will manage the unit as customers experience the benefits of the new ABB Electrification one line of power and control products.

DeFazio Industries (Glen Allen, VA): **Andy Shook** has joined the company as an outside sales representative for the South Carolina market.

REP NEWS

FISHCO Group, St. Louis, will represent Classic Wire in eastern Missouri and southern Illinois. FISHCO has serviced the St. Louis market and surrounding area since 1998.

Archibald & Meek, a commercial sales agency based in Elmhurst, IL, will now represent Nora Lighting throughout central Illinois. The sales agency has overseen Nora Lighting commercial product sales throughout the Chicago area since 2018 and will now handle a larger territory.

Walker-Loudermilk Co. will represent Classic Wire & Cable in Kansas and western Missouri. The agency was founded in 1964 and operates out of downtown Kansas City. "We are expanding our network across the US. With the addition of Walker-Loudermilk, we will be able to reach more customers in the Midwest," said George Merritt, vice president of sales and marketing, in the press release.

JR & Associates, Louisville, NE, will represent Orbit Industries' complete line of electrical products throughout Iowa and Nebraska. JR & Associates is a family-owned and operated manufacturers' representative with 21 years of electrical industry experience.

J.F. Nolan & Associates, New Berlin, WI, now represents LEDVANCE in Wisconsin and the Upper Peninsula of Michigan, according to a post on LinkedIn.

DeFazio Industries will be carrying GE Current's legacy lamp and ballasts portfolios in the Virginia market, with an additional focus on LED technology. Founded in 2016, DeFazio Industries has become one of the fastest-growing representation firms in the mid-Atlantic and Southeast regions.

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