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Electrical Wholesaling®

NOVEMBER/
DECEMBER 2023
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THE INDEPENDENT VOICE OF ELECTRICAL DISTRIBUTION

The 2024 MARKET PLANNING GUIDE

*Storage for New Artificial Intelligence Projects May **Drive a Surge of Data Center Construction**. Read more on* ***pg. 12***

$10.00

contents

November/December 2023
Volume 104, Number 6

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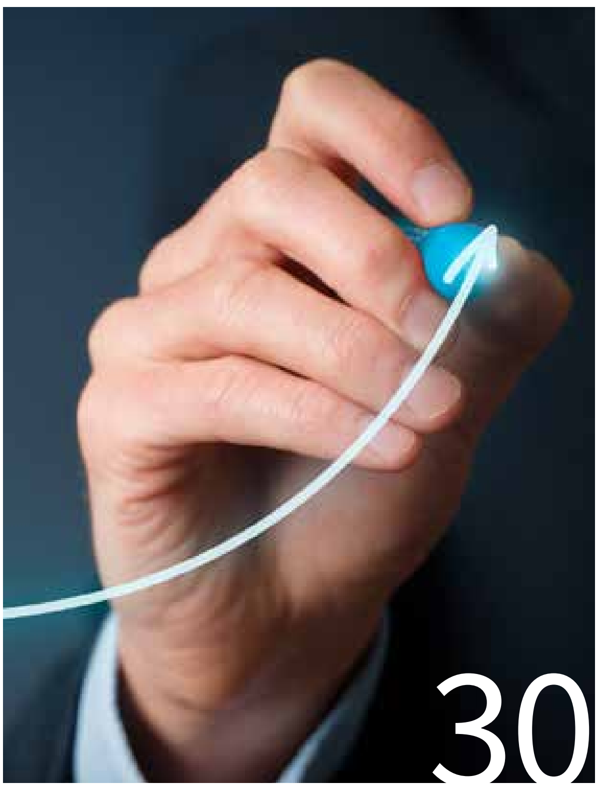

FEATURES

DEPARTMENTS

Electrical Wholesaling®

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Winner of the Jesse H. Neal Editorial Achievement Award 1966, 1973, 1975, 1981, 1985
Winner of the Jesse H. Neal Certificate of Merit 1960, 1961 (First Award), 1976, 1993, 1996 (2)

ASBPE American Society of Business Publication Editors
2010 National EDITORIAL *Award Winner*
revenue $2 million or under

ASBPE American Society of Business Publication Editors
2008 National EDITORIAL *Award Winner*
circulation under 80,000

ASBPE American Society of Business Publication Editors
2004 National DESIGN *Award Winner*
circulation less than 80,000

ASBPE American Society of Business Publication Editors
2004 Regional DESIGN *Gold*
circulation less than 80,000

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Making the right connections

A New Chapter for *Electrical Wholesaling*

With a move to an all-digital format come some exciting opportunities to serve readers and advertisers with more robust editorial content.

Electrical Wholesaling will enter a new era in 2024 with a move to all-digital content. *EW's* print publication served the electrical market long and well for more than 100 years.

But because the reading habits of subscribers and marketing objectives of advertisers have evolved over the years, the *Electrical Wholesaling* team and our parent company, Endeavor Business Media, decided that going forward an all-digital format for our editorial content will best match the information and marketing needs of our audience.

As a sentimental guy who will never stop believing in the power of print and has spent more than 40 years of his career making print magazines (and surviving 400-plus monthly deadlines), the thought of this being the last print issue of *Electrical Wholesaling* made me reflect on how the magazine can best serve the information needs of the electrical community in the future.

It also makes me think about several of my editorial mentors from my early years on *EW* — George Ganzenmuller, Andrea Herbert, George Farley, Tom Preston and Joe McPartland — who not only taught me about the electrical business but showed me it's an industry you can love and a place where you can make a career.

As we close the print chapter of *Electrical Wholesaling*, it makes me laugh a bit, too, at the memories of the sometimes zany antics of co-workers, outside authors, artists and photographer who contributed to the pages of this publication over the years.

I am proud of what we accomplished in the print era, and with their help *Electrical Wholesaling* outlasted several other fine publications in print that cover the distribution industry, including NAED's *TED* magazine and *Industrial Distribution*.

Times move on, and with it comes new opportunities. *EW's* all-digital format will allow our editors to create more content for the electrical market in a much more timely manner than the bi-monthly print publication. And it will give advertisers additional exposure opportunities to reach the *Electrical Wholesaling* audience through more posted content, market data, podcasts, webinars, online training classes, white papers and other new and emerging digital channels.

While the print version will cease publication at the end of 2023, the best of *EW*'s award-winning editorial content will continue to be published regularly in an expanded format at *www.ewweb.com*. Readers will have 24/7 access at *www.ewweb.com* to respected industry analysis such as:

- The annual listing of the Top 150 electrical distributors in North America
- *EW's* Market Planning Guide
- *EW's* Electrical Pyramid to help you analyze the changing channels of distribution
- The popular Electrical Market 101 series
- Our annual popular picks for the hottest local markets
- A monthly digital version of this "Times & Trends" column

In addition to this widely respected digital content, in 2024 *Electrical Wholesaling's* editorial team will be posting several new & exciting online learning resources including:

- A new Lunch-and-Learn series of educational podcasts for new employees based on the Electrical Market 101 series of articles on the residential, commercial and industrial markets
- A quarterly *EW* Executive Insights webinar that will explore key market trends, economic indicators and industry news
- Monthly online Q&As in podcasts with key industry decisionmakers

Along with this new digital content, *ewweb.com* and *EW's* social media feeds will be loaded with daily posts on people on the move, rep appointments, branch openings & other news from distributors, reps and manufacturers, the latest acquisitions, new product picks and other industry insight.

While the format for our editorial content will be changing in 2024, our team has the same mission: to provide you with the information you need to sell more electrical products and run your business more profitably. **EW**

By Jim Lucy, Editor-In-Chief

Sonepar Acquires Sunrise Electric & Electric Supply of Tampa

Sonepar announced that two of its operating companies made major acquisitions in Chicago and Tampa. Viking Electric Supply , St. Paul, MN, plans to acquire Sunrise Electric Supply Inc., Addison, IL, and World Electric acquired Electric Supply of Tampa (ESI) from Supply Chain Equity Partners on Sept. 30.

Viking Electric currently operates 22 locations across Minnesota, Wisconsin and Chicago. According to the press release, the Sunrise acquisition signals Sonepar's commitment to grow its business in what the company says is the second largest electrical market in the country.

Since 1986, Sunrise Electric Supply has built a reputation as one of the leading electrical supply companies serving customers in the Chicago area. It joins Sonepar with more than 80 associates. Sunrise Electric is ranked #78 on *Electrical Wholesaling's* 2023 Top 150 listing with $138 million in 2022 sales out of one location.

Don Chriske, president and owner of Sunrise Electric Supply, said in the press release, "Through our 37-year-old history as a privately held company, our employees have always been vital to our success. I believe aligning with Sonepar will give them many opportunities to enrich their future growth. We are excited to utilize the resources Sonepar brings to both our employees and customers."

Electric Supply of Tampa is ranked #70 on *EW's* most recent Top 150 ranking. Headquartered in Tampa, FL, ESI serves contractor and utility customers throughout Florida, the Caribbean and Latin America. ESI brings nine additional locations and over 220 associates to the Sonepar network. Sonepar plans to align the electrical contractor business of ESI with World Electric, while ESI's utility segment will align with Irby Utilities, Sonepar's national utility platform.

Harry Irwin, ESI's president and CEO, said in the press release, "The dramatic growth ESI has experienced with Supply Chain Equity Partners has led us to this exciting opportunity. What Sonepar will offer our ESI associates in capabilities, resources and professional growth was a key factor in our decision to choose them as our partner."

World Electric operates 18 branch locations throughout Florida and Georgia. Irby Utilities operates 46 branch locations across the United States and has a strong presence in Florida.

DODGE'S DATA POINTS TO SLUGGISH CONSTRUCTION MARKET

The Dodge Momentum Index (DMI), issued by Dodge Construction Network, increased +1% in October to 181.7 points (2000=100) from the revised September reading of 180.3 points. The DMI is a monthly measure of the initial report for nonresidential building projects in planning, shown to lead construction spending for nonresidential buildings by a full year.

"Heightened momentum in warehouse planning activity supported the commercial side of the Index this month, while muted education planning activity slowed the institutional portion," said Sarah Martin, associate director of forecasting for Dodge Construction Network, in the press release. "Overall levels of planning activity remain robust and will support construction spending over the next 12 to 18 months."

Improvements in warehouse planning helped support commercial growth, but despite strong progress in September, education and healthcare activity slowed down this month. Year over year, the DMI was -8% lower than in October 2022.

A total of 21 projects valued at $100 million or more entered planning in October. The largest commercial projects to enter planning included the $215-million Google Data Center in Kansas City, MO, and the $180-million Mauna Kea Beach Hotel in Waimea, HI. The largest institutional projects to enter planning included the $400-million Grand Sierra Resort Arena in Reno, NV, and $267-million renovation to Keller Auditorium in Portland, OR.

According to Dodge's monthly construction report, total construction starts fell +6% in September to a seasonally adjusted annual rate of $1.2 trillion. Nonresidential starts lost -4%, residential starts declined -6%, and nonbuilding starts fell -9%.

Year-to-date through September 2023, total construction starts were -3% below that of 2022. Residential and non-residential starts were down -17% and -7%, respectively; however, nonbuilding starts were up +25% on a year-to-date basis. For the 12 months ending September 2023, total construction starts were unchanged. Nonbuilding starts were +22% higher, and nonresidential building starts gained +3%. Conversely, on a 12-month rolling basis, residential starts posted a 16% decline.

"Risks continue to mount for the construction sector," said Richard Branch, chief economist for Dodge Construction Network, in the press release. "Over the last 12 months, construction starts have essentially froze as rates increased and credit tightened. The industry needs further adjusting as rates are expected to stay higher for longer, along with the potential for higher energy costs and continued political uncertainty. A return to broad-based growth in construction starts is still some time away."

FRM & Bell and McCoy Merge

FRM and Bell & McCoy Companies, two of the nation's largest independent reps firms, have merged. Both reps have served customers for more than 50 years and together will reach customers across 13 states in the South, Southwest, Southeast and Puerto Rico. According to the press release, FRM and Bell & McCoy Companies employ more than 500 employees.

Founded in 1969, FRM now has offices in Tampa, FL; Norcross, GA; and Charlotte, NC, and covers Alabama, Florida, Georgia, the Carolinas, Virginia and Tennessee. The firm focuses on the commercial, residential, industrial and utility markets. Bell & McCoy Companies was established in 1972 and covers Texas, New Mexico, Oklahoma, Arkansas, Tennessee, Louisiana, Mississippi, Alabama and the Florida panhandle. Its core business segments include electrical supplies, lighting and controls, tools, utility, safety, luxury homes and programming.

The companies represent a number of the same manufacturers in some territories. Some common vendor lines include some of the Atkore brands, Cantex, Commodity Cables Inc., Kingwire, LS Cable & System, MCXP Solutions and Milbank. In other news at Bell & McCoy, the company completed the acquisition of J.S. Cotney Inc., a Birmingham, AL-based lighting rep, according to a LinkedIn post.

AD Distributors Enjoy +9% Growth Through Nine Months

Affiliated Distributors (AD), the Wayne, PA-based marketing group reported that sales for its owner-member sales through nine months of 2023 reached a new record of $57.6 billion, an increase of +3% across 14 divisions and three countries. The AD divisions with the highest growth were Safety at +13%, and Electrical, Industrial and Bearings/Power Transmission at +9% each.

Owner member same-store sales grew +6% through the first nine months of 2023. By country, same-store sales in the U.S. were up +7%, while same-store for Canada and Mexico were up +6% and +1%, respectively.

Eighty new companies joined the group through the first nine months of the year, half of which came via acquisition by existing members, the balance from other groups on their own. Thirty-five of AD's existing 866 members were sold to outside entities.

AD Chairman and CEO Bill Weisberg said in the press release, "Our multi-industry/multi-country strategy, coupled with our investments in value-added programs and services and positive collaboration with our supplier partners propel us forward."

EW NEWS ANALYSIS

FSG Acquires ESCO

Facility Solutions Group, Inc. (FSG) Austin, TX, acquired Lighting Management Inc. (LMI), Valley Cottage, NY. With offices in North Carolina, South Carolina and Florida, this acquisition allows FSG to further expand its lighting service offerings nationally.

LMI has specialized in providing lighting and control products, lighting specification and design services and lighting solutions to retail, commercial and hospitality customers across the United States for more than 47 years.

Green Mountain Electric Supply Buys Lighting Specialist

Green Mountain Electric Supply, Colchester, VT, expanded into Massachusetts and bolstered its lighting and energy services with the acquisition of Atlantic Electrical Supply, Shrewsbury, MA. The new location will focus on value-added expertise on energy-efficient projects, including lighting and EV charging, according to a Green Mountain LinkedIn post.

Atlantic Electrical Distributors Services said on its website that it focuses on being a lighting consultant "who will not only help you select the best products and solutions for your project, but will also pair you with the most qualified contractor when both rebates and installation services are required."

Green Mountain Electrical Supply is ranked #38 on *Electrical Wholesaling's* 2023 Top 150 listing with 400 employees and 26 locations. The company has made at least eight acquisitions since 2020.

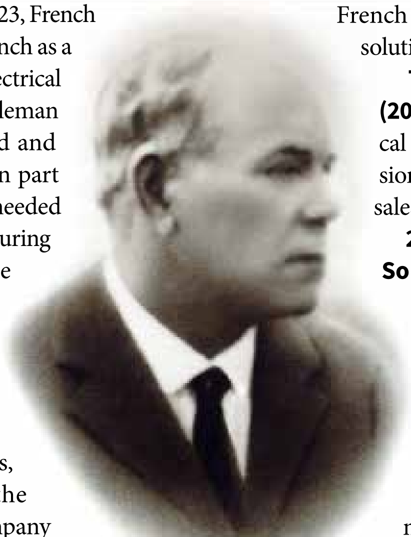
Schaedler Yesco Distribution Expands in Northwestern PA

Schaedler Yesco Distribution, Harrisburg, PA, announced plans to acquire Clarion Electric Supply, a two-location, 53-year-old electrical distributor in the northwestern Pennsylvania region that focuses on the electrical contractor market. Clarion Electric is headquartered in Clarion, PA with a second branch location in Grove City, PA. Following a proper due diligence period, closing for the acquisition is anticipated in Dec. 2023.

Agilix Solutions Celebrates 100th Anniversary

Agilix Solutions, St. Louis, MO, is celebrating a significant milestone: the 100th anniversary of one of its legacy companies, French Gerleman. Agilix Solutions is the product of a merger between French Gerleman and IAC Supply Solutions in 2021. The company was launched in 1923. Below are some of the key milestones in the company's growth over the years.

The early years (1923 - 1930s). In 1923, French Electric, founded in 1914 by Albert O. French as a motor repair shop in St. Louis, acquired Electrical Machinery Co., giving rise to French Gerleman Electric Co. Inc. The company survived and thrived through the Great Depression, in part by serving demand for 25-cycle motors needed in the construction of the Panama Canal. During this era, the company began what would be a key vendor partnership when in 1935, French Gerleman established one of the nation's earliest distribution relationships with the Allen-Bradley Co.


Albert O. French

Steady growth and new leadership (1940s - 1950s). During the 1940s, French Gerleman's sales surpassed the $100,000-milestone, and in 1954 the company expand to eight employees.

Milestones and innovation (1960s - 1970s). Notable achievements in the 1960s and 1970s included relocation to accommodate St. Louis' Busch Stadium and crossing the $1-million sales threshold in 1974.

In 1964, leadership transitioned with the passing of Charles C. French, as Albert E. French assumed the presidency, paving the way for further expansion.

Diversification and expansion (1980s - 1990s). The formation of a construction division, the opening of additional branches, and the introduction of integration services in the 1980s signaled diversification and paved the way for the company to take a major role in industrial automation. Venturing into data communications and networking in 1995 positioned French Gerleman as a comprehensive technology solutions provider.

Technological advancement and growth (2000s). French Gerleman embraced technological advances and expanded into power transmission, substantiating its market presence. Annual sales surpassed $100 million in 2006.

2021: French Gerleman and IAC Supply Solutions merge. The merger of French Gerleman and IAC Supply Solutions in 2021 was driven by a shared vision to expand product and service offerings while enhancing the customer experience. The newly formed company, Agilix Solutions, serves more than 8,000 customers from 13 branches in Missouri, Illinois, Kansas, Arkansas, Tennessee and Mississippi.

A vision for the future. "As we celebrate 100 years of achievement, we honor our heritage while looking ahead to a strong future defined by growth, innovation and unwavering commitment to customer satisfaction," said Mike Stanfill, CEO of Agilix Solutions, in the press release.

Agilix Solutions is ranked #50 on *EW's* Top 150 ranking. It focuses on the automation, electrical, datacom, power transmission, safety, industrial supply, lighting and solar markets.

A Pro's Guide to Training New Salespeople

During his 45 years in the distribution business, Frank Hurtte with River Heights Consulting has worked for distributors, trained salespeople, launched the popular *distributionchannel.blogspot.com*, authored books on this business, spoken at countless industry conferences — all in a most entertaining and thought-provoking manner.

In recent years, Frank has spent a lot of time thinking about where the industry is now headed. This reflection on this business led to an epic effort to research his latest book, The New Sales Guy Project. River Heights Consulting interviewed more than 200 salespeople and their sales managers about their rookie strategies, sale tips and techniques. Says Frank in explaining the New Sales Guy project, "I have been personally involved in the sales process for knowledge-based distributors for a very long time – 45 years at last count. I have assisted new salespeople in some way or another for at least 30 years."

The book is now available in paperback on Amazon for $42.50. For more information on the book, contact Hurtte at *frank@riverheightsconsulting.com.*


Frank Hurtte

electrostats

VITAL STATISTICS

CONSTRUCTION

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

	Sep. '23[1]	Aug. '23[2]	Mo. % Change	Sep. '22	YTY % Change
Total Construction	**1,996.50**	**1,988.30**	**0.4**	**1,836.90**	**8.7**
Total Private Construction[1]	**1555.90**	**1549.6**	**0.40**	**1455.5**	**6.9**
Residential	872.00	866.6	0.60	891.7	-2.2
New single family	402.30	397.2	1.30	427.6	-5.9
New multifamily	135.7	135.8	-0.1	110.9	22.3
Nonresidential	683.9	683.0	0.1	563.9	21.3
Lodging	24	24.1	-0.4	20.8	15.3
Office	84.5	84.4	0	78.9	7.1
Commercial	129.5	128.8	0.6	120.0	7.9
Health care	49.4	49.5	-0.3	42.9	15
Educational	23.8	23.4	1.4	18.4	29.1
Religious	3.2	3.2	-2.40	3.0	5.4
Amusement and recreation	16.4	16.1	1.7	15.3	7
Transportation	19.5	19.7	-1.1	18.5	5.4
Communication	24.7	24.6	0.4	24.4	1.2
Power	106.5	106.1	0.4	96.7	10.1
Electric	89.0	88.3	0.8	77.5	14.8
Manufacturing	198.5	199.3	-0.4	122.2	62.5
Public Construction ($ billions)[2]	440.6	438.7	0.4	381.4	15.5
Residential	10.30	10.6	-3.20	9.3	10.2
Nonresidential	430.3	428.1	0.5	372.1	15.7
Office	15.50	15.3	1.00	12.8	20.6
Commerical	4.60	4.3	6.40	4.4	5.3
Health care	12.9	13.1	-1.1	11.1	16.1
Educational	94.4	92.7	1.9	81.1	16.5
Public saftey	13	13.0	-1	11.1	16.2
Amusement and recreation	17	17.1	1	13.9	23.7
Transportation	44.800	44.8	0.000	41.8	7.3
Power	17	16.0	5	9.9	69.1
Highway and street	131	131.4	0	118.8	10.4
Sewage and waste disposal	41	40.8	-1	32.7	24
Water supply	27	26.7	0	24.1	10.5
Conservation and development	12	11.5	1	9.1	28.2

Housing Starts (SAAR)	Sep. '23[1]	Aug. '23[2]	Mo. % Change	Sep. '22	YTY % Change
Housing starts (SAAR)	1,473	1,541	-4.4%	1,588	-7.2%
Total (thousands of units)	965	948	1.8%	865	11.6%
Single-family (thousands of units)	459	534	-14.0%	671	-31.6%

EMPLOYMENT WAGE & PRICE STATISTICS

	Mo.	Latest Month	Mo. % Change	Year ago	YTY % Change
Employment, Electrical Contractors (thousands)[4]	JUL	1044.3	0.4	965.4	8.2
Hourly wage, Electrical Contractors ($)[4]	JUL	36.54	0.4	32.03	14.1
Copper prices (cents per pound)	AUG	376.34	-1.9	439.80	-14.4

INDUSTRIAL MARKET

	Mo.	Latest Month	Mo. % Change	Year ago	YTY % Change
Electrical Mfrs' Shipments ($ millions)	JUL	4,688	2.0	3,636	28.9
Electrical Mfrs' Inventories ($ millions SA)[2]	JUL	9,909	0.7	7,106	39.4
Electrical Mfrs' Inventory-to-Shipments ratio	JUL	2.114	-1.3	1.954	8.2
Electrical Mfrs' New Orders ($ millions SA)[2]	JUL	4,721	3.6	3,988	18.4
Machine Tool Orders ($ millions)[6]	JUL	343.45	-13.0	476.95	-28.0
Industrial Capacity Utilization (percent, SA)[1]	AUG	77.89	0.0 pts.	77.10	1.0 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.*

EBCI Index Swings into Growth Mode

For the first time since Feb. 2023, the current conditions component of NEMA'S Electrobusiness Conditions Index (EBCI) broke into expansionary territory, as October's reading hit 52.8 points.

The proportion of respondents reporting "better" conditions actually declined in October compared to the previous month, but panel members indicating "unchanged" conditions leapt to a 72% share. Comments revealed solid growth in sectors bolstered by the electrification movement, as well as in construction related to data centers, power and industrial. However, some industry executives had concerns about unstable geopolitics and deteriorating financial conditions, with one reporting a slowdown in orders.

The 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.

Placing it firmly in expansionary territory, the future conditions component increased by more than 10 points in October, as the expectations for business conditions six months from now reached 63.9 points, compared to 53.6 points in September. The share of panel members expecting either "better" or "unchanged" conditions increased during the October survey period. That relative bullishness was supported by executives' expectations for an improved residential market and growth from energy transition efforts. On the flip side, one respondent already noted a decrease in the book to bill ratio, while another indicated "market softening to continue into 2024."

Private manufacturing, for months the hottest individual construction category, showed a small decrease of -0.4% to $198.5 billion, but is still up +62.5% YOY. With $111 billion in September spending, the computer/electronic/electrical manufacturing segment accounts for more than half of the dollars spent in this category. **EW**

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2024 MARKET PLANNING GUIDE

While no one seems to be expecting gangbusters growth in 2024, next year the $144.3-billion electrical wholesaling industry should still see a steady flow of solid business opportunities.

ID 104750065 © Sashkinw | Dreamstime.com

Electrical Marketing's editors found 16 data center projects valued at more than $100 million underway or in the planning stages in 2023. At least five of these projects topped $1 billion in total contract value — the DC BLOX data center campus in Douglassville, GA; Microsoft data centers in Mount Pleasant, WI, and Rome, GA; and the Prime Data Center campus in Elk Grove Village, IL.

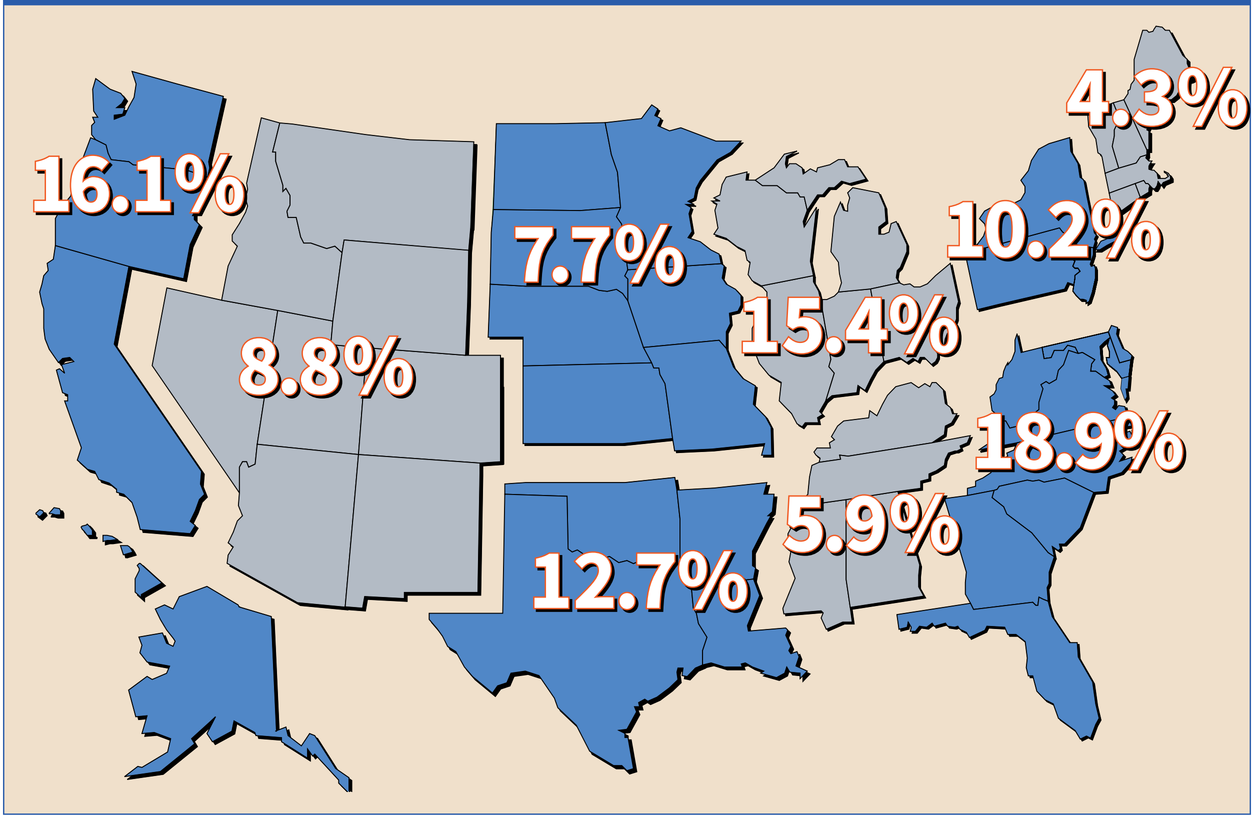
When you dig deeper into economic factors that will have the biggest impact on business conditions in the electrical market, you soon uncover one central challenge that influences most others — inflation.

Inflation seems to be slowly moving in the right direction after rising to levels not seen in decades during and shortly after the COVID shutdown. But if inflation stalls at current levels, the challenges the electrical market is currently having with higher product prices, the slowdown in spending on construction projects or business expansion because of higher borrowing costs, and tough times in the housing market because of higher mortgage costs will continue. The higher interest rates could also tamp down demand for the stocks of publicly held electrical manufacturers, distributors and contractors.

By Jim Lucy, Editor-In-Chief

Despite the concerns over inflation, distributor respondents to several recent surveys, as well as most construction industry economists and Wall Street analysts, don't see a recession in 2024. Nick Lipinski, an equities analyst with Vertical Research Partners (VRP), who manages the quarterly *EW*/VRP survey on electrical market conditions, says the responses on 2024 demand were mixed. Election noise may impact decision-making in 2024, says Lipinski, but distributor respondents in the Q3 2023 survey agreed projects already underway will be seen to completion. He said that while the survey forecast

PERCENTAGE OF 2024 ELECTRICAL DISTRIBUTORS' SALES BY REGION



of +3.3% growth over Q2 2023 (+2.7% volume growth and +0.6% of price) was generally in line or above expectations, several distributors noted a marked slowing in day-to-day activity in October.

"It's too soon to tell if this is merely a temporary pause or the start of a more meaningful deceleration," he said. "We have heard in prior quarters about soft spots of a week or two that turned out to just be air pockets in between spurts of still-strong demand.

"Some distributors have also seen a slower quoting environment, though others still see a healthy pipeline related to reshoring and/or stimulus-related investments. Looking forward, distributors are expecting sales down -1.6% on average for Q4 2023, the first anticipated decline since 2020."

2024 NATIONAL MULTIPLIERS

Market	Economic Factor	Multiplier
Electrical Contractors	Number of electrical contractor employees	$78,775
Industrial Total	Number of manufacturing employees	$2,650
Industrial MRO	Number of manufacturing employees	$1,215
Industrial OEM	Number of manufacturing employees	$1,270
Factory Automation	Number of manufacturing employees	$166
Utilities	Number of ultimate customers utilities serve	$64
Government	Number of government employees	$277
Mining	Number of employees at mining companies	$726

MODEST GROWTH IN NONRESIDENTIAL CONSTRUCTION

While Dodge Construction Network is looking at +3% growth in the key nonresidential sector in 2024, the company's economists still have concerns for future growth because of interest rates and borrowing costs. "Risks continue to mount for the construction sector," said Richard Branch, chief economist for Dodge Construction Network, in a recent press release. "Over the last 12 months, construction starts have essentially froze as rates increased and credit tightened. The industry needs further adjusting as rates are expected to stay higher for longer, along with the potential for higher energy costs and continued political uncertainty. A return to broad-based growth in construction starts is still some time away."

In her analysis of the most recent Dodge Momentum Index data, a leading indicator for future construction activity, Sarah Martin, associate director of forecasting for Dodge Construction

Network, said in the press release, "Solid demand for data centers, life science labs and hospitals supported the uptick in nonresidential planning activity last month. While month-to-month trends can be volatile, year-to-date trends show an overall decrease in commercial planning, offset by more institutional projects entering the queue. If financial conditions improve in early 2024, steady planning activity should follow."

Several other construction forecasters issued cautious forecasts for 2024 growth. ConstructConnect said it expects total U.S. construction starts to contract -8.1% in 2023 but return to growth of +2.8% in 2024. ConstructConnect's Autumn 2023 quarterly forecast said, "Nonresidential building activity is not expected to return to growth in 2024, but levels of construction activity are high relative to historic averages. The medium-term outlook is positive with support from the Inflation Reduction Act (IRA) and the Creating Helpful Incentives to Produce Semiconductors (CHIPS) Act. The bumper growth in 2022 means that the 2023 growth rate will be negative due to large projects falling out of the calculation, while capacity constraints are likely to weigh on activity in 2024, causing a slump of -1.9%."

The Deloitte consulting firm also sees federal legislation sparking growth in 2024. It said in its *2024 Engineering & Construction Industry Outlook*, "Looking ahead to 2024, there could be a boost to construction associated with manufacturing, transportation infrastructure and clean energy infrastructure, as funds from three key pieces of legislation passed in 2021 and 2022 — the Infrastructure Investment and Jobs Act (IIJA), the IRA and the CHIPS Act — are expected to flow into the industry."

One of the most interesting construction forecasts available is the Consensus Construction Forecast published twice-a-year by the American Institute of Architects. It blends the forecasts for key construction niches from nine leading construction economists at the following companies: Dodge Construction Network, S&P Global Market Intelligence, Moody's Analytics, FMI, ConstructConnect, Associated Builders & Contractors, Wells Fargo Securities, Markstein Advisors and Piedmont Crescent Capital. AIA's forecast expect nonresidential construction spending to increase just +2% next year after a +19.7% boost this year, supported in large part by a +55.1% increase in industrial construction spending.

In his July 2023 commentary on the updated 2023 Consensus Construction Forecast, Kermit Baker, AIA's chief economist said spending on nonresidential buildings has been growing at a "torrid" pace so far this year. "Even with the expected moderation during the second half of the year, the AIA Consensus Construction Forecast Panel is projecting that spending will increase by just under +20% for the year," he said in his analysis. "That pace of growth hasn't been seen since the construction boom years leading up to the Great Recession. Leading the charge is the manufacturing sector, where spending is projected to increase more than +50% this year on top of an exceptional performance last year. And while industrial construction spending is expected to be the bright light, healthy gains are expected across the board, with both the commercial and institutional construction categories projected to increase at a double-digit pace.

"However, after the surge this year, market spending growth is expected to come back to earth in 2024. Forecast panelists are calling for a modest +2% increase in overall building spending next year, with a projected modest decline in the commercial sector, a +4% increase in spending on institutional facilities and just a +5% increase in the currently red-hot industrial sector."

A more recent report from AIA, the AIA/Deltek Architecture Billings Index (ABI), which tracks business for architects, said conditions at architecture firms continued to soften in October. For the third consecutive month, the ABI

NATIONAL SALES-PER-EMPLOYEE

Year	Market Planning Guide	Top 150/Top 200
2022	Not available	$941,649
2021	$553,592	$799,132
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

score was under 50 points, indicating that a significant share of firms is seeing a decline in billings. "This report indicates not only a decrease in billings at firms, but also a reduction in the number of clients exploring and committing to new projects, which could potentially impact future billings," Baker said in the press release. "The soft conditions were evident across the entire country as well as across all major nonresidential building sectors."

Three nonresidential project types that look particularly promising are Electric vehicle plants, semiconductor fabrication facilities and data centers. To get a sense of the market climate for other core construction segments, including the residential and industrial markets, office and mixed-use construction, hospitals, schools and universities, renewables and the utility market, check out *Electrical Wholesalings's* expanded 2024 Market Planning Guide at *www.ewweb.com*.

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 distributor's 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 published by the U.S. Bureau of Labor Statistics (a three-month average of employment data from July 2023 through Sept. 2023).

By using this forecasting method and accounting for an estimated inflation rate of 2.4% in 2024, *EW's* editors believe full-line electrical distributors will sell $144.3 billion worth of electrical supplies next year.

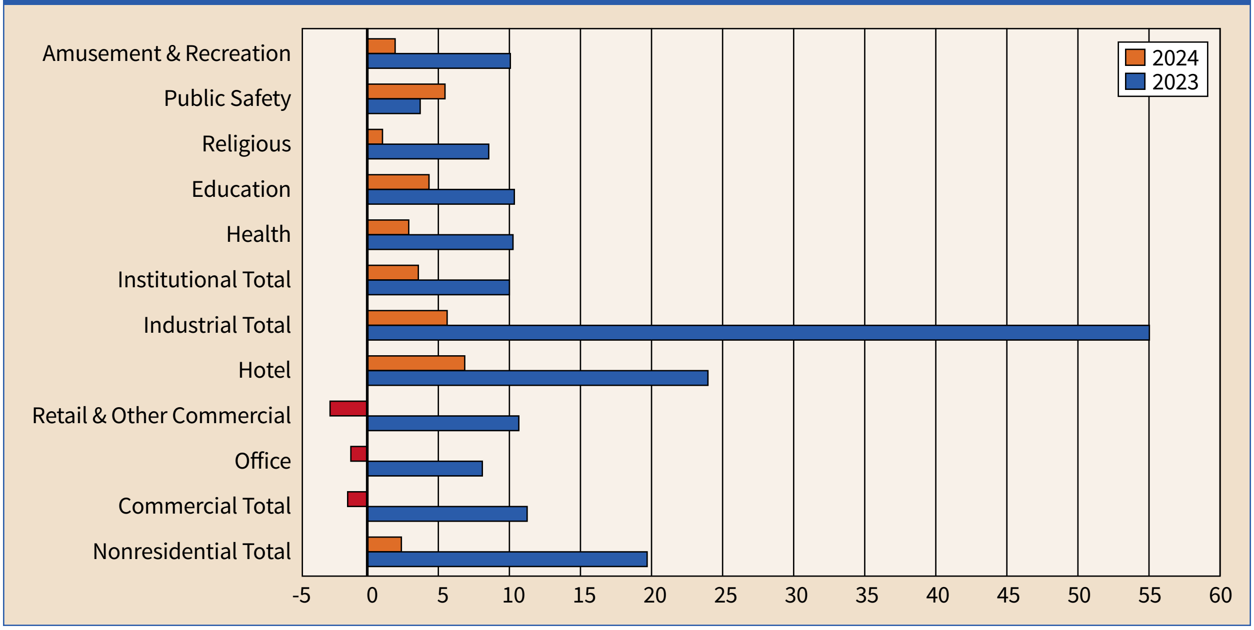
Methodology. Normally, our annual Market Planning Guide includes a sales estimate for the next year, as well as some insight into distributors' anticipated capital expenditures and their expectations for business conditions in key market segments. Unfortunately, this year the response rate for this survey was not high enough at press-time to publish a statistically viable forecast for 2024, so *EW's* editors are continuing our survey efforts until enough responses come in. We will publish our 2024 sales forecast at *www.ewweb.com* when we are comfortable with the responses rate.

Please respond to *Electrical Wholesaling's* Market Planning Guide surveys when you see them — filling it out only takes a few minutes and it helps us produce more reliable electrical sales forecasts.

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

AIA'S CONSENSUS CONSTRUCTION FORECAST: 2023 & 2024



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 distributor 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 for 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. Here are some ideas for how to use employment data in your market planning.

- 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 *EW's* National Multipliers on page 13). 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 number of sales available from a particular account. For example, if a local manufacturer employs 300 people, by applying the multiplier of $1,215, you expect the facility to purchase about $364,500 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 bought a typical amount of product from them. It tends to be a larger number than actual sales.

You can also use *EW's* multipliers to track sales through different types of customers over time. For sales to electrical contractors, use *EW's* national multiplier of $78,775 for each electrical contractor employee. We are using the same multiplier for contractor and industrial employment as last year.

Summary. While the overall economic forecast for the industry may call for slower growth in 2024, some individual market sectors and regions of the country will do much better than the low single-digit growth that economists expect for the electrical market. **EW**

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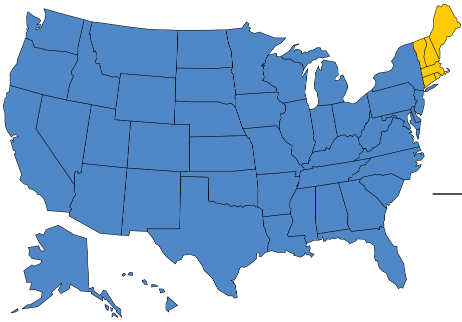


New England

Connecticut • Maine • Massachusetts
New Hampshire • Vermont • Rhode Island

Not as many large projects appear to be underway in this region as in years past, but several large jobs are in the planning phase in the Boston suburbs. Harvard University is planning a $750-million expansion in Allston, MA, with the first phase of the Enterprise Research Campus; the $710-million Medford Life Science Park in Medford, MA, entered the planning phase in June 2023; a $325-million data center was proposed in Westfield, MA; and a $240-million expansion of the Lexington High School hit the drawing boards in July, 2023. Connecticut has some interesting projects in the pipeline with the Feb. 2023 groundbreaking for the $300-million Great Wolf Lodge at Foxwoods Casino in Ledyard, CT; the $230-million Waterford Millstone Data Center that broke ground in Sept. 2023; and the planned $200-million Solano Hall of Justice courthouse in Fairfield, CT.

% OF 2024 U.S. SALES

4.3%

NEW ENGLAND

SALES POTENTIAL BY STATE ($ MILLIONS)

	2024 Total Sales $ Potential	% of Region	Electrical Contractor $ Potential	Industrial $ Potential
New England	**6,366.4**		**3,631.7**	**1,461.4**
Connecticut	1,338.9	21.0%	652.0	419.1
Massachusetts	3,148.8	49.5%	1,887.4	631.7
Maine	625.1	9.8%	355.0	145.1
New Hampshire	654.2	10.3%	332.8	190.5
Rhode Island	292.7	4.6%	234.2	106.4
Vermont	306.7	4.8%	170.3	75.0

METROS WITH THE MOST SALES POTENTIAL

(in millions of dollars)

Rank	Area	2024 Total $ Potential	Electrical Contractor $ Potential	Industrial $ Potential
1	Boston-Cambridge-Nashua, MA-NH	2,372.7	1,412.2	486
2	Providence-Warwick, RI	542.4	300.1	133.9
3	Hartford-West Hartford-East Hartford, CT	460.4	223.6	144.7
4	Bridgeport-Stamford-Norwalk, CT	274.7	143.4	76.4
5	Springfield, MA	264.7	135.9	75.9
6	Worcester, MA	253.6	129.7	73.2
7	New Haven-Milford, CT	229.4	122.5	61
8	Portland-South Portland, ME	200.7	119.5	41.1
9	Nashua, NH	153.4	63.8	58.9
10	Norwich-New London, CT	121.0	44.0	52.8

EMPLOYMENT STATISTICS

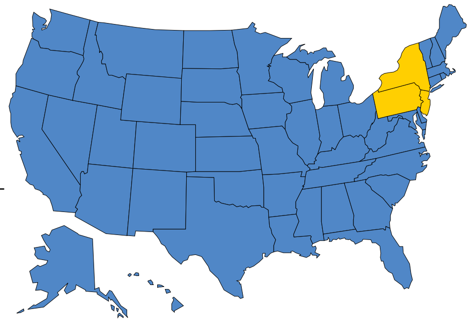
Area	Electrical Contractor Estimate	YOY # Change	YOY % Change	Industrial Employment	YOY # Change	YOY % Change
CONNECTICUT	**8,277**	**65**	**0.8**	**158,167**	**(333)**	**-0.2**
Hartford-West Hartford-East Hartford, CT	2,838	61	2.2	54,600	(1,367)	-2.4
Bridgeport-Stamford-Norwalk, CT	1,820	(13)	-0.7	28,833	(433)	-1.5
New Haven-Milford, CT	1,556	43	2.9	23,033	(633)	-2.7
Norwich-New London, CT	559	–	0.0	19,933	867	4.5
MASSACHUSETTS	**23,959**	**1,083**	**4.7**	**238,367**	**(1,333)**	**-0.6**
Boston-Cambridge-Nashua, MA-NH	17,927	858	5.0	183,400	(1,267)	-0.7
Springfield, MA	1,725	56	3.4	28,633	(233)	-0.8
Worcester, MA	1,647	4	0.3	27,633	(33)	-0.1
Barnstable Town, MA	1,109	48	4.5	3,400	(33)	-1
Pittsfield, MA	260	(26)	-9.1	2,900	–	0
MAINE	**4,507**	**82**	**1.9**	**54,767**	**(500)**	**-0.9**
Portland-South Portland, ME	1,517	39	2.6	15,500	(133)	-0.9
Bangor, ME	498	9	1.8	2,367	(167)	-6.6
Lewiston-Auburn, ME	390	–	0.0	5,267	(33)	-0.6
NEW HAMPSHIRE	**4,225**	**169**	**4.2**	**71,900**	**1,200**	**1.7**
Nashua, NH	810	(4)	-0.5	22,233	600	2.8
Manchester, NH	797	35	4.5	8,033	33	0.4
Portsmouth, NH	429	26	6.5	9,933	200	2.1
Dover-Durham, NH	286	9	3.1	5,300	67	1.3
RHODE ISLAND	**2,973**	**134**	**4.7**	**40,133**	**(267)**	**-0.7**
Providence-Warwick, RI	3,809	204	5.6	50,533	(600)	-1.2
VERMONT	**2,162**	**30**	**1.4**	**28,300**	**(1,033)**	**-3.5**
Burlington-South Burlington, VT	810	4	0.5	12,333	(333)	-2.6

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 2023 - Sept. 2023 and July 2022 - Sept. 2022. 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	**22,442**	**511**	**2.3**	**254,600**	**2,100**	**0.8**
Middlesex-Monmouth-Ocean, NJ	6,296	520	9.0	46,667	(967)	-2
Trenton, NJ	767	(4)	-0.6	10,967	367	3.5
Atlantic City, NJ	810	–	0.0	2,500	–	0
Vineland-Bridgeton, NJ	477	13	2.8	9,067	167	1.9
NEW YORK	**53,079**	**914**	**1.8**	**424,467**	**(1,933)**	**-0.5**
New York-Newark-Jersey City, NY-NJ-PA, NY	54,964	1,720	3.2	351,133	2,267	0.6
Rochester, NY	3,133	(39)	-1.2	55,833	400	0.7
Buffalo-Cheektowaga-Niagara Falls, NY	2,916	(56)	-1.9	54,767	1,267	2.4
Albany-Schenectady-Troy, NY	2,773	(52)	-1.8	26,833	(600)	-2.2
Syracuse, NY	1,902	30	1.6	25,233	(500)	-1.9
Dutchess County-Putnam County, NY	1,222	39	3.3	8,067	(333)	-4
Binghamton, NY	537	(48)	-8.1	10,967	(100)	-0.9
Utica-Rome, NY	429	(26)	-5.7	11,500	(233)	-2
Glens Falls, NY	364	13	3.7	5,933	(33)	-0.6
Kingston, NY	394	(9)	-2.2	3,500	(100)	-2.8
Elmira, NY	199	–	0.0	5,100	(100)	-1.9
Watertown-Fort Drum, NY	277	17	6.7	1,800	(67)	-3.6
Ithaca, NY	156	–	0.0	2,500	(133)	-5.1
PENNSYLVANIA	35,954	1,010	2.9	568,600	833	0.1
Philadelphia-Camden-Wilmington, PA-NJ-DE-MD	17,173	641	3.9	183,167	2,667	1.5
Pittsburgh, PA	7,917	26	0.3	86,500	3,167	3.8
Lebanon, PA	7,930	273	3.6	9,567	400	4.4
Lancaster, PA	2,682	126	4.9	38,567	(67)	-0.2
Allentown-Bethlehem-Easton, PA	1,889	22	1.2	41,400	300	0.7
York-Hanover, PA	1,720	43	2.6	33,467	533	1.6
Scranton-Wilkes-Barre-Hazleton, PA	1,547	87	5.9	30,133	200	0.7
Harrisburg-Carlisle, PA	1,703	61	3.7	22,767	–	0
Reading, PA	1,088	9	0.8	31,000	(167)	-0.5
Erie, PA	611	4	0.7	18,333	(633)	-3.3
Chambersburg-Waynesboro, PA	373	22	6.2	9,000	100	1.1
Altoona, PA	412	9	2.2	7,167	100	1.4
Gettysburg, PA	243	–	0.0	7,633	33	0.4
East Stroudsburg, PA	273	13	5.0	5,000	(33)	-0.7
Johnstown, PA	243	9	3.7	4,167	67	1.6
Bloomsburg-Berwick, PA	182	4	2.4	5,067	167	3.4

Large construction jobs broke ground throughout this region in 2023. Pittsburgh's airport has a $1.6-billion expansion project; the billion-dollar Clarkson Square mixed-used project broke ground in the Big Apple in July 2023; and the $810-million, 1,500MW Brooklyn Clean Energy Hub substation that will power 750,000 homes is being built. Construction is also cooking in Philadelphia, with the $575-million Spark Therapeutics Gene Therapy Innovation Center at Drexel University; the $329-million Penn's Landing project; and the $225-million Chapel Block mixed-use project. The city of Brotherly Love also had a small increase in estimated electrical contractor employment, with a +1.5% increase to 23,812 employees. Multi-family construction has cooled off in the New York area with a -42.9% YOY decline, but this market still had 21,415 multi-family building permits through Sept. 2023. Philadelphia saw a smaller decline in its multi-family permits and through September was sitting at 3,610 permits for buildings with five units or more.

% OF 2024 U.S. SALES

10.2%

MIDDLE ATLANTIC

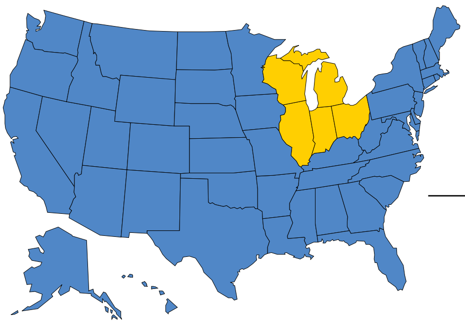
SALES POTENTIAL BY STATE ($ MILLIONS)

	2024 Total Sales $ Potential	% of Region	Electrical Contractor $ Potential	Industrial $ Potential
Middle Atlantic	**15,109.7**		**8,781.4**	**3,306.3**
New Jerssey	3,053.2	20.2%	1,767.9	674.7
New York	6,632.6	43.9%	4,181.3	1,124.8
Pennsylvania	5,423.8	35.9%	2,832.3	1,506.8

METROS WITH THE MOST SALES POTENTIAL

(in millions of dollars)

Rank	Area	2023 Total $ Potential	Electrical Contractor $ Potential	Industrial $ Potential
1	New York-Newark-Jersey City, NY-NJ-PA, NY	6,575.4	4,329.8	930.5
2	Philadelphia-Camden-Wilmington, PA-NJ-DE-MD	2,297.8	1,352.8	485.4
3	Pittsburgh, PA	1,066.1	623.7	229.2
4	Lebanon, PA	812.6	624.7	25.4
5	Rochester, NY	493.5	246.8	148
6	Buffalo-Cheektowaga-Niagara Falls, NY	468.5	229.7	145.1
7	Camden, NJ	452.2	251.9	109.8
8	Lancaster, PA	391.9	211.3	102.2
9	Albany-Schenectady-Troy, NY	362.0	218.5	71.1
10	Allentown-Bethlehem-Easton, PA	323.2	148.8	109.7



East North Central

Illinois • Indiana • Michigan • Ohio • Wisconsin

This region is a big beneficiary of all the spending on EV plants, as well as the federal stimulus funds for onshoring of semiconductor fabrication plants. Intel's $20-billion investment in Ohio chip plants is underway; a $1.5-billion EV battery plant broke ground in Terre Haute, IN, in September; and General Motors announced plans for a $632-million investment in a Fort Wayne, IN, assembly plant. Data center construction is active, too, with the billion-dollar data centers that broke ground in Elk Grove Village, IL, and Mount Pleasant, WI, and the $515-million Amazon data center in Hilliard, OH. Other major projects include plans for the $2-billion John Glen Columbus Airport scheduled to break ground next year; the $510-million Related Midwest 72-story apartment towers planned for Chicago's waterfront; the $500-million University of Michigan Residence & Dining Hall in the planning stage; and the $500-million Northwestern Mutual downtown office tower underway in Milwaukee.

% OF 2024 U.S. SALES

15.4%

EAST NORTH CENTRAL

SALES POTENTIAL BY STATE ($ MILLIONS)

	2024 Total Sales $ Potential	% of Region	Electrical Contractor $ Potential	Industrial $ Potential
East North Central	**22,659.2**		**10,471.2**	**7,656**
Illinois	5,097.7	22.5%	2,575.5	1502.6
Indiana	3,974.7	17.5%	1,745.0	1434.7
Michigan	4,590.2	20.3%	2,058.7	1613.4
Ohio	5,559.8	24.5%	2,622.0	1825.9
Wisconsin	3,436.9	15.2%	1,469.9	1279.6

METROS WITH THE MOST SALES POTENTIAL

(in millions of dollars)

Rank	Area	2023 Total $ Potential	Electrical Contractor $ Potential	Industrial $ Potential
1	Chicago-Naperville-Elgin, IL	3,861.6	2,004.8	1084.5
2	Detroit-Warren-Dearborn, MI	1,910.5	878.0	650.4
3	Indianapolis-Carmel-Anderson, IN	1,148.9	657.5	261.7
4	Cincinnati, OH	1,090.6	549.6	322.9
5	Cleveland-Elyria, OH	957.2	448.5	317.2
6	Columbus, OH	944.6	560.2	195.5
7	Milwaukee-Waukesha-West Allis, WI	853.6	375.2	307.7
8	Madison, WI	405.6	218.8	105.7
9	Gary, IN	361.4	199.4	89.8
10	Toledo, OH	354.1	166.2	117

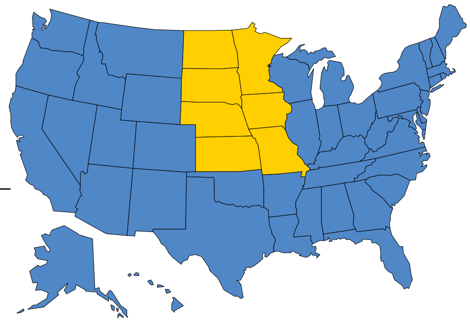
EMPLOYMENT STATISTICS

Area	Electrical Contractor Estimate	YOY # Change	YOY % Change	Industrial Employment	YOY # Change	YOY % Change
ILLINOIS	**32,695**	**732**	**2.3**	**567,000**	**(7,300)**	**-1.3**
Chicago-Naperville-Elgin, IL	25,450	572	2.3	409,233	333	0.1
Lake County-Kenosha County, IL	2,106	17	0.8	63,700	(300)	-0.5
Elgin, IL	1,837	(143)	-7.2	35,933	33	0.1
Peoria, IL	1,144	9	0.8	23,233	33	0.1
Rockford, IL	750	(39)	-4.9	24,500	(1,300)	-5
Decatur, IL	559	17	3.2	10,300	(467)	-4.3
Champaign-Urbana, IL	563	—	0.0	8,067	(133)	-1.6
Bloomington, IL	377	(26)	-6.5	9,933	467	4.9
Springfield, IL	533	(4)	-0.8	3,533	(67)	-1.9
Kankakee, IL	169	(26)	-13.3	6,700	(267)	-3.8
Danville, IL	91	—	0.0	4,333	(33)	-0.8
INDIANA	**22,152**	**1,031**	**4.9**	**541,400**	**(2,900)**	**-0.5**
Indianapolis-Carmel-Anderson, IN	8,346	399	5.0	98,767	3,400	3.6
Gary, IN	2,531	117	4.8	33,900	(133)	-0.4
Fort Wayne, IN	1,681	22	1.3	38,433	(167)	-0.4
Elkhart-Goshen, IN	628	52	9.0	69,633	(6,433)	-8.5
South Bend-Mishawaka, IN	867	56	7.0	15,067	(500)	-3.2
Lafayette-West Lafayette, IN	594	17	3.0	20,767	433	2.1
Columbus, IN	264	9	3.4	19,400	33	0.2
Terre Haute, IN	550	9	1.6	9,400	(267)	-2.8
Bloomington, IN	451	17	4.0	12,333	(367)	-2.9
Michigan City-La Porte, IN	299	4	1.5	8,300	(67)	-0.8
Kokomo, IN	173	4	2.6	8,600	(133)	-1.5
Muncie, IN	212	4	2.1	3,800	(33)	-0.9
Evansville, IN	1,330	56	4.4	22,833	—	0
MICHIGAN	**26,134**	**828**	**3.3**	**608,833**	**2,033**	**0.3**
Detroit-Warren-Dearborn, MI	11,145	(26)	-0.2	245,433	(3,533)	-1.4
Grand Rapids-Wyoming, MI	3,995	277	7.5	115,600	1,500	1.3
Lansing-East Lansing, MI	1,287	22	1.7	21,800	1,333	6.5
Kalamazoo-Portage, MI	958	(26)	-2.6	25,200	600	2.4
Flint, MI	906	9	1.0	13,667	(33)	-0.2
Ann Arbor, MI	654	13	2.0	12,700	200	1.6
Saginaw, MI	455	—	0.0	11,400	(33)	-0.3
Muskegon, MI	347	(4)	-1.2	13,833	67	0.5
Niles-Benton Harbor, MI	312	13	4.3	13,100	333	2.6
Jackson, MI	312	—	0.0	9,500	—	0
Battle Creek, MI	260	—	0.0	10,300	—	0
Monroe, MI	273	(9)	-3.1	5,400	67	1.3
Bay City, MI	204	(17)	-7.8	4,933	100	2.1

(Continued on page 29)

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	**11,444**	**165**	**1.5**	**227,700**	**1,933**	**0.9**
Des Moines-West Des Moines, IA	3,120	(113)	-3.5	23,367	200	0.9
Davenport-Moline-Rock Island, IA	1,291	(30)	-2.3	25,433	200	0.8
Cedar Rapids, IA	1,196	—	0.0	20,700	700	3.5
KANSAS	**9,091**	**403**	**4.6**	**170,633**	**167**	**0.1**
Wichita, KS	2,331	43	1.9	51,800	667	1.3
Kansas City, KS	3,276	147	4.7	—	—	—
Topeka, KS	771	26	3.5	8,433	(200)	-2.3
MINNESOTA	**19,868**	**719**	**3.8**	**326,233**	**(2,167)**	**-0.7**
Minneapolis-St. Paul-Bloomington, MN	12,506	78	0.6	206,100	567	0.3
Duluth, MN	1,361	(82)	-5.7	8,367	67	0.8
St. Cloud, MN	1,075	(35)	-3.1	15,667	433	2.8
Rochester, MN	732	(4)	-0.6	9,700	(100)	-1
MISSOURI	**18,157**	**(420)**	**-2.3**	**289,467**	**4,767**	**1.7**
St. Louis, MO	9,455	(433)	-4.4	120,933	3,433	2.9
Kansas City, MO	8,004	316	4.1	84,833	(600)	-0.7
Springfield, MO	1,404	(17)	-1.2	19,267	(67)	-0.3
NORTH DAKOTA	**3,623**	**(186)**	**-4.9**	**27,800**	**133**	**0.5**
Fargo, ND	1,291	(43)	-3.2	11,600	(67)	-0.6
Bismarck, ND	615	(30)	-4.7	3,000	100	3.4
Grand Forks, ND	420	(17)	-4.0	4,367	200	4.8
NEBRASKA	**8,446**	**429**	**5.4**	**106,900**	**2,800**	**2.7**
Omaha-Council Bluffs, NE	4,442	147	3.4	35,500	433	1.2
Lincoln, NE	1,482	69	4.9	14,767	33	0.2
SOUTH DAKOTA	**4,030**	**186**	**4.8**	**46,000**	**633**	**1.4**
Sioux Falls, SD	1,577	74	4.9	15,033	300	2
Rapid City, SD	828	69	9.1	3,100	—	0

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While East Coasters and West Coasters may consider this region to be flyover country, it's loaded with an impressive array of construction projects. St. Louis recently announced plans for a new $3-billion airport; the $2-billion Meridien mixed-used project in the Kansas City suburb of Overland Park, KS, is about 20 minutes from the $6-billion Panasonic battery plant being built in DeSoto, KS; and plans were announced for the $932-million Blue Sky Data Center expansion in Omaha, NE; and a new $600-million Google data center in Kansas City. Wind farms are big business in this region, too, and the $750-million High Banks wind farm broke ground in Belleville, KS, in January. Other big projects include the $600-million Mutual of Omaha headquarters underway in Omaha, NE; a $523-million prison expansion in Leavenworth, KS; and the $400-million ICL EV battery plant in St. Louis.

% OF 2024 U.S. SALES

7.7%

WEST NORTH CENTRAL

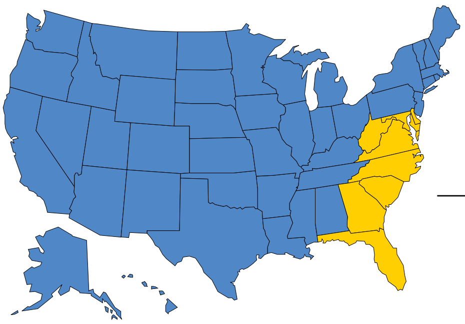
SALES POTENTIAL BY STATE ($ MILLIONS)

	2024 Total Sales $ Potential	% of Region	Electrical Contractor $ Potential	Industrial $ Potential
West North Central	**11,309.2**		**5,881.3**	**3,166.1**
Iowa	1,881.2	16.6%	901.5	603.4
Kansas	1,460.5	12.9%	716.2	452.2
Minnesota	3,037.0	26.9%	1,565.1	864.5
Missouri	2,746.7	24.3%	1,430.3	767.1
North Dakota	448.8	4.0%	285.4	73.7
Nebraska	1,185.8	10.5%	665.3	283.3
South Dakota	549.2	4.9%	317.5	121.9

METROS WITH THE MOST SALES POTENTIAL

(in millions of dollars)

Rank	Area	2023 Total $ Potential	Electrical Contractor $ Potential	Industrial $ Potential
1	Minneapolis-St. Paul-Bloomington, MN	1,914.2	985.2	546.2
2	St. Louis, MO	1,331.7	744.8	320.5
3	Kansas City, MO	1,069.1	630.5	224.8
4	Omaha-Council Bluffs, NE	555.0	349.9	94.1
5	Wichita, KS	401.2	183.7	137.3
6	Des Moines-West Des Moines, IA	384.6	245.8	61.9
7	Kansas City, KS	322.6	258.1	—
8	Davenport-Moline-Rock Island, IA	211.4	101.7	67.4
9	Sioux Falls, SD	205.1	124.3	39.8
10	Springfield, MO	202.1	110.6	51.1



South Atlantic

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

This region loaded with some of the fastest-growing market in the U.S. At least eight construction projects valued at more than $1 billion broke ground here in 2023, including the $2.7-billion Nucor sheet steel mill in Apple Grove, WV; the $2.5-billion Hyundai/SK EV plant in Cartersville, GA; the $2.5-billion John Palmour Manufacturing Center for Silicon Carbide factory in Siler City, NC; and the $2-billion VinFast EV plant in New Hill, NC. Along with thousands of multi-family units planned for big markets like Miami, Washington, DC, Atlanta, Charlotte, Orlando, Nashville, Tampa, Jacksonville and Raleigh, are data centers in northern Virginia and Georgia and the $810-million Envision AESC battery plant to supply BMW's EV factory in South Carolina.

% OF 2024 U.S. SALES
18.9%
SOUTH ATLANTIC

SALES POTENTIAL BY STATE ($ MILLIONS)

	2024 Total Sales $ Potential	% of Region	Electrical Contractor $ Potential	Industrial $ Potential
South Atlantic	**27,905.0**		**17,001.0**	**5,323.0**
District of Columbia	206.5	0.7%	162.5	2.7
Delaware	412.3	1.5%	256.7	73.1
Florida	9,252.8	33.2%	6,281.3	1,120.9
Georgia	4,253.0	15.2%	2,293.9	1,108.5
Maryland	2,549.5	9.1%	1,749.1	290.5
North Carolina	4,774.4	17.1%	2,561.6	1,258.0
South Carolina	2,296.8	8.2%	1,141.2	696.3
Virginia	3,575.4	12.8%	2,208.6	651.7
West Virginia	584.3	2.1%	346.1	121.3

METROS WITH THE MOST SALES POTENTIAL

(in millions of dollars)

Rank	Area	2023 Total $ Potential	Electrical Contractor $ Potential	Industrial $ Potential
1	Atlanta-Sandy Springs-Roswell, GA	2,437.0	1,486.6	463
2	Miami-Fort Lauderdale-West Palm Beach, FL	2,110.8	1,430.0	258.7
3	Washington-Arlington-Alexandria, DC-VA-MD-WV, DC	1,844.6	1,380.5	95.2
4	Tampa-St. Petersburg-Clearwater, FL	1,464.7	969.8	202
5	Charlotte-Concord-Gastonia, NC	1,334.1	778.0	289.3
6	Baltimore-Columbia-Towson, MD	1,308.4	894.0	152.7
7	Orlando-Kissimmee-Sanford, FL	1,275.6	878.7	141.8
8	Jacksonville, FL	779.7	526.0	97.7
9	Raleigh, NC	739.6	497.0	94.7
10	Virginia Beach-Norfolk-Newport News, VA	733.2	431.1	155.4

EMPLOYMENT STATISTICS

Area	Electrical Contractor Estimate	YOY # Change	YOY % Change	Industrial Employment	YOY # Change	YOY % Change
DISTRICT OF COLUMBIA	**2,063**	**61**	**3.0**	**1,000**	**(33)**	**-3.2**
Washington-Arlington-Alexandria, DC-VA-MD-WV, DC	17,524	490	2.9	35,933	(1,133)	-3.1
DELAWARE	**3,259**	**156**	**5.0**	**27,567**	**1,200**	**4.6**
Wilmington, DE-MD-NJ, DE	2,531	225	9.8	18,033	1,033	6.1
Salisbury, MD-DE	1,265	(17)	-1.4	14,467	133	0.9
Dover, DE	368	17	4.9	5,600	233	4.3
FLORIDA	**79,738**	**888**	**1.1**	**422,967**	**10,800**	**2.6**
Miami-Fort Lauderdale-West Palm Beach, FL	18,152	(823)	-4.3	97,633	2,867	3
Tampa-St. Petersburg-Clearwater, FL	12,311	628	5.4	76,233	2,433	3.3
Orlando-Kissimmee-Sanford, FL	11,154	(264)	-2.3	53,500	1,200	2.3
Jacksonville, FL	6,678	139	2.1	36,867	2,433	7.1
Cape Coral-Fort Myers, FL	4,944	108	2.2	8,033	–	0
North Port-Sarasota-Bradenton, FL	4,060	256	6.7	19,300	867	4.7
Palm Bay-Melbourne-Titusville, FL	2,249	(56)	-2.4	33,400	1,367	4.3
Naples-Immokalee-Marco Island, FL	2,600	17	0.7	5,800	400	7.4
Lakeland-Winter Haven, FL	1,920	(74)	-3.7	19,900	167	0.8
Deltona-Daytona Beach-Ormond Beach, FL	1,872	(48)	-2.5	12,467	(33)	-0.3
Port St. Lucie, FL	1,751	(39)	-2.2	8,400	200	2.4
Pensacola-Ferry Pass-Brent, FL	1,681	(56)	-3.2	7,000	(33)	-0.5
Ocala, FL	1,226	(22)	-1.7	10,100	(267)	-2.6
Tallahassee, FL	1,192	26	2.2	4,000	(100)	-2.4
Crestview-Fort Walton Beach-Destin, FL	1,079	48	4.6	3,600	67	1.9
Panama City, FL	1,014	39	4.0	3,400	100	3
Gainesville, FL	841	13	1.6	4,700	–	0
Punta Gorda, FL	680	(4)	-0.6	1,000	33	3.4
Sebastian-Vero Beach, FL	624	(4)	-0.7	2,567	67	2.7

(Continued on page 29)

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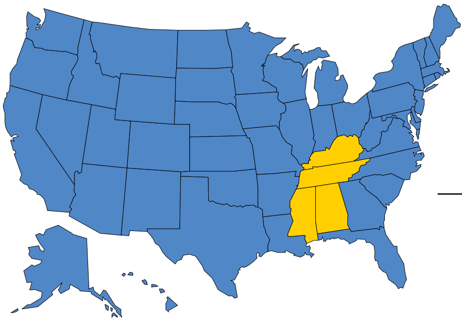

East South Central

Alabama • Kentucky • Mississippi • Tennessee

This region has enjoyed breaking ground on some major EV assembly and battery plants. A big battery plant started construction in February — the $500-million Apex-1 Sustainable Lithium-Ion battery plant, in Hopkinsville, KY. Kentucky is also home to the massive Blue Oval SK EV plant Ford and SK Innovation broke found on in Glendale, KY, in Dec. 2022. The companies also plan to build a plant in Stanton, TN, for a total investment of $11.2 billion. Another large project planned in the region is the $1-billion expansion of the St. Jude Children's Research Hospital clinic & office towers in Memphis, TN. Nashville, TN, is one of the fastest-growing markets in the country when measured by the number of single-family building permits, populations growth and increase in electrical contractor employment. The city is alive with construction projects, including the expansion of the $500-expansion of the Vanderbilt hospital; the AEG mixed-use project; and a plans for a new billion-dollar stadium for the NFL's Tennessee Titans.

% OF 2024 U.S. SALES

5.9%

EAST SOUTH CENTRAL

SALES POTENTIAL BY STATE ($ MILLIONS)

	2024 Total Sales $ Potential	% of Region	Electrical Contractor $ Potential	Industrial $ Potential
East South Central	**8,632.1**		**4,109.3**	**2,813.9**
Alabama	2,219.8	25.7%	1,040.8	735.0
Kentucky	2,067.8	24.0%	958.9	695.4
Mississippi	1,087.5	12.6%	484.7	385.3
Tennessee	3,257.0	37.7%	1,624.9	980.7

METROS WITH THE MOST SALES POTENTIAL

(in millions of dollars)

Rank	Area	2023 Total $ Potential	Electrical Contractor $ Potential	Industrial $ Potential
1	Nashville-Davidson-Murfreesboro-Franklin, TN	1,056.3	608.3	236.7
2	Louisville/Jefferson County, KY-IN	720.6	342.0	234.4
3	Birmingham-Hoover, AL	523.5	314.7	104.1
4	Memphis, TN-MS-AR	473.4	261.5	117.2
5	Knoxville, TN	438.3	222.2	128.4
6	Chattanooga, TN-GA	307.7	140.0	106.2
7	Lexington-Fayette, KY	302.6	158.4	83.7
8	Huntsville, AL	243.0	107.9	86.5
9	Mobile, AL	224.8	129.4	50.5
10	Jackson, MS	220.7	124.9	51.6

EMPLOYMENT STATISTICS

Area	Electrical Contractor Estimate	YOY # Change	YOY % Change	Industrial Employment	YOY # Change	YOY % Change
ALABAMA	**13,212**	**260**	**2.0**	**277,367**	**1,567**	**0.6**
Birmingham-Hoover, AL	3,995	139	3.6	39,267	267	0.7
Huntsville, AL	1,369	(13)	-0.9	32,633	433	1.3
Mobile, AL	1,642	95	6.2	19,067	567	3.1
Montgomery, AL	910	13	1.4	19,133	733	4
Tuscaloosa, AL	862	39	4.7	19,200	333	1.8
Decatur, AL	563	(13)	-2.3	14,000	33	0.2
Florence-Muscle Shoals, AL	568	26	4.8	8,733	133	1.6
Auburn-Opelika, AL	438	22	5.2	7,067	233	3.4
Dothan, AL	351	(4)	-1.2	5,600	133	2.4
Anniston-Oxford-Jacksonville, AL	156	(4)	-2.7	6,900	200	3
Gadsden, AL	130	–	0.0	4,600	167	3.8
KENTUCKY	**12,172**	**1,031**	**9.3**	**262,400**	**8,067**	**3.2**
Lexington-Fayette, KY	2,011	143	7.7	31,600	(67)	-0.2
Bowling Green, KY	507	4	0.9	14,433	433	3.1
Owensboro, KY	329	4	1.3	10,200	67	0.7
Elizabethtown-Fort Knox, KY	338	9	2.6	8,267	167	2.1
Louisville/Jefferson County, KY-IN	4,342	225	5.5	88,467	5,633	6.8
MISSISSIPPI	**6,153**	**199**	**3.3**	**145,400**	**(2,033)**	**-1.4**
Jackson, MS	1,586	65	4.3	19,467	(333)	-1.7
Gulfport-Biloxi-Pascagoula, MS	1,018	65	6.8	18,067	367	2.1
TENNESSEE	**20,627**	**572**	**2.9**	**370,067**	**1,967**	**0.5**
Nashville-Davidson-Murfreesboro-Franklin, TN	7,722	48	0.6	89,333	2,700	3.1
Knoxville, TN	2,821	78	2.8	48,467	333	0.7
Jackson, TN	407	(4)	-1.1	12,533	(133)	-1.1
Morristown, TN	308	9	2.9	12,500	167	1.4
Johnson City, TN	377	13	3.6	8,567	33	0.4
Cleveland, TN	325	17	5.6	9,000	–	0
Chattanooga, TN-GA	1,777	113	6.8	40,067	1,200	3.1
Clarksville, TN-KY	589	52	9.7	12,267	467	4
Memphis, TN-MS-AR	3,319	(35)	-1.0	44,233	(400)	-0.9
Kingsport-Bristol-Bristol, TN-VA	832	61	7.9	20,800	(333)	-1.6

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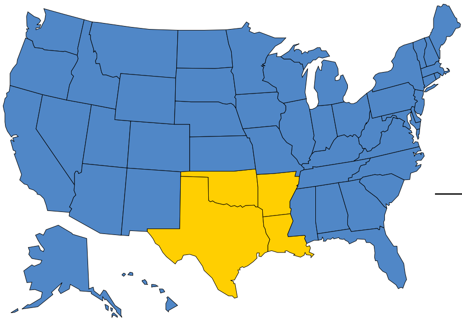


West South Central

Arkansas • Louisiana • Oklahoma • Texas

Although Texas typically leads this region in construction spending, two big projects broke ground this year in Louisiana — the $780-million BASF MDI chemical plant in Geismar, LA, and the $750-million Magnolia Power/Kindle Energy power station in Plaquemine, LA. The planned $4.8-billion expansion of DFW Airport is the largest job announced in Texas in 2024, and the $2.4-billion Austin School District modernization program will also be huge. Other big jobs include the $573-million Terrell state hospital in Terrell, TX; the $540-million Merit Gulfstar solar farm in Wharton County, TX; the $530-million Mockingbird Solar Center in Brookston, TX; a $500-million GM assembly plant planned for Arlington, TX; and the new $500-millon Goldman Sach campus underway in Dallas. Texas homebuilders will still be busy in 2024, judging from the most recent permit data. Single-family permits in Houston, Dallas, Austin and San Antonio totaled 90,518 through Sept. 2023.

% OF 2024 U.S. SALES

12.7%

WEST SOUTH CENTRAL

SALES POTENTIAL BY STATE ($ MILLIONS)

	2024 Total Sales $ Potential	% of Region	Electrical Contractor $ Potential	Industrial $ Potential
West South Central	**18,792**		**11,305.4**	**3,728.4**
Arkansas	1,377	7.3%	667.7	434.0
Louisiana	2,231	11.9%	1,418.3	366.4
Oklahoma	1,532	8.2%	864.0	361.4
Texas	13,653	72.6%	8,355.4	2,566.6

METROS WITH THE MOST SALES POTENTIAL

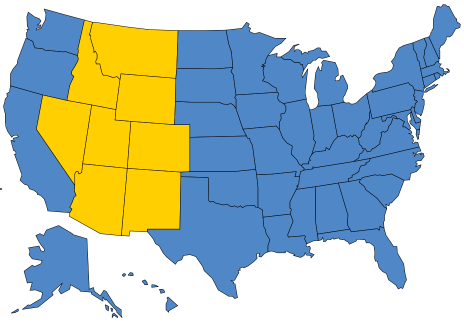
(in millions of dollars)

Rank	Area	2023 Total $ Potential	Electrical Contractor $ Potential	Industrial $ Potential
1	Dallas-Fort Worth-Arlington, TX	4,319.7	2,628.5	827.3
2	Houston-The Woodlands-Sugar Land, TX	3,584.4	2,248.5	619
3	Austin-Round Rock, TX	1,334.5	873.2	194.4
4	San Antonio-New Braunfels, TX	1,008.8	655.4	151.6
5	Baton Rouge, LA	783.4	545.1	81.6
6	Oklahoma City, OK	551.8	346.5	95
7	Midland, TX	543.5	421.2	13.6
8	Tulsa, OK	514.8	278.2	133.6
9	New Orleans-Metairie, LA	492.9	314.4	79.9
10	Little Rock-North Little Rock-Conway, AR	333.7	214.0	52.9

EMPLOYMENT STATISTICS

Area	Electrical Contractor Estimate	YOY # Change	YOY % Change	Industrial Employment	YOY # Change	YOY % Change
ARKANSAS	**8,476**	**793**	**10.3**	**163,767**	**167**	**0.1**
Little Rock-North Little Rock-Conway, AR	2,717	212	8.5	19,967	—	0
Fayetteville-Springdale-Rogers, AR	2,171	204	10.4	32,467	600	1.9
Fort Smith, AR	728	39	5.7	18,600	(67)	-0.4
LOUISIANA	**18,005**	**1,148**	**6.8**	**138,267**	**3,133**	**2.3**
Baton Rouge, LA	6,920	914	15.2	30,800	1,433	4.9
New Orleans-Metairie, LA	3,991	299	8.1	30,167	500	1.7
Lake Charles, LA	1,699	95	5.9	10,933	333	3.1
Lafayette, LA	1,473	82	5.9	16,533	333	2.1
Shreveport-Bossier City, LA	1,118	74	7.1	10,633	267	2.6
Houma-Thibodaux, LA	719	30	4.4	—	—	—
OKLAHOMA	**10,968**	**555**	**5.3**	**136,367**	**2,467**	**1.8**
Oklahoma City, OK	4,398	113	2.6	35,867	633	1.8
Tulsa, OK	3,532	295	9.1	50,400	2,533	5.3
Lawton, OK	195	9	4.7	3,900	—	0
TEXAS	**106,067**	**3,038**	**2.9**	**968,533**	**33,267**	**3.6**
Dallas-Fort Worth-Arlington, TX	33,367	2,704	8.8	312,200	10,300	3.4
Houston-The Woodlands-Sugar Land, TX	28,544	(893)	-3.0	233,600	7,433	3.3
Austin-Round Rock, TX	11,085	624	6.0	73,367	2,500	3.5
San Antonio-New Braunfels, TX	8,320	269	3.3	57,200	(600)	-1
Midland, TX	5,347	464	9.5	5,133	333	6.9
Beaumont-Port Arthur, TX	2,635	134	5.4	21,633	900	4.3
Corpus Christi, TX	2,752	134	5.1	8,933	433	5.1
El Paso, TX	2,318	61	2.7	18,467	200	1.1
Odessa, TX	2,570	169	7.0	4,133	133	3.3
Longview, TX	1,733	(17)	-1.0	9,833	467	5
Waco, TX	1,062	(39)	-3.5	15,867	100	0.6
Amarillo, TX	1,031	17	1.7	14,767	333	2.3
Lubbock, TX	1,239	17	1.4	5,300	200	3.9
McAllen-Edinburg-Mission, TX	1,131	(17)	-1.5	7,300	200	2.8
Killeen-Temple, TX	1,018	26	2.6	8,200	167	2.1
College Station-Bryan, TX	984	(30)	-3.0	6,300	133	2.2
Tyler, TX	927	22	2.4	7,367	233	3.3
Abilene, TX	693	26	3.9	3,733	33	0.9
Brownsville-Harlingen, TX	481	17	3.7	7,400	333	4.7
San Angelo, TX	533	26	5.1	3,633	33	0.9
Sherman-Denison, TX	442	13	3.0	6,300	100	1.6
Victoria, TX	572	13	2.3	2,100	100	5
Wichita Falls, TX	377	—	0.0	5,500	400	7.8
Laredo, TX	420	—	0.0	900	100	12.5
Texarkana, TX-AR	416	30	7.9	6,133	300	5.1

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	**26,208**	**667**	**2.6**	**194,533**	**(233)**	**-0.1**
Phoenix-Mesa-Scottsdale, AZ	20,856	797	4.0	149,100	(467)	-0.3
Tucson, AZ	2,617	61	2.4	29,800	1,400	4.9
Prescott, AZ	945	43	4.8	3,900	(67)	-1.7
Lake Havasu City-Kingman, AZ	568	(4)	-0.8	3,100	(33)	-1.1
Yuma, AZ	550	43	8.5	2,900	–	0
Flagstaff, AZ	390	13	3.4	3,800	267	7.5
Sierra Vista-Douglas, AZ	269	9	3.3	800	100	14.3
COLORADO	**24,080**	**(334)**	**-1.4**	**155,567**	**1,400**	**0.9**
Denver-Aurora-Lakewood, CO	14,781	(13)	-0.1	73,267	1,400	1.9
Colorado Springs, CO	2,513	(22)	-0.9	11,900	(167)	-1.4
Greeley, CO	2,349	91	4.0	13,467	133	1
Fort Collins, CO	1,673	43	2.7	15,233	167	1.1
Boulder, CO	797	35	4.5	22,533	300	1.3
Grand Junction, CO	901	(9)	-1.0	3,300	67	2.1
Pueblo, CO	594	17	3.0	4,900	167	3.5
IDAHO	**9,477**	**442**	**4.9**	**72,400**	**(1,833)**	**-2.5**
Boise City, ID	4,788	303	6.8	30,033	(1,000)	-3.2
Coeur d'Alene, ID	945	26	2.8	5,400	(100)	-1.8
Idaho Falls, ID	780	22	2.9	5,233	(100)	-1.9
Pocatello, ID	351	–	0.0	2,233	(67)	-2.9
Lewiston, ID	221	(9)	-3.8	4,633	(67)	-1.4
MONTANA	**5,174**	**113**	**2.2**	**23,200**	**1,000**	**4.5**
NEW MEXICO	**6,899**	**420**	**6.5**	**30,267**	**867**	**2.9**
Albuquerque, NM	3,566	143	4.2	17,733	600	3.5
Las Cruces, NM	529	35	7.0	3,467	100	3
Santa Fe, NM	403	4	1.1	800	–	0
NEVADA	**14,820**	**663**	**4.7**	**69,133**	**2,567**	**3.9**
Las Vegas-Henderson-Paradise, NV	10,703	537	5.3	31,133	1,767	6
Reno, NV	3,072	186	6.5	29,567	600	2.1
UTAH	**17,996**	**477**	**2.7**	**152,433**	**(33)**	**0**
Salt Lake City, UT	7,934	407	5.4	63,800	(100)	-0.2
Provo-Orem, UT	4,190	134	3.3	23,533	(367)	-1.5
Ogden-Clearfield, UT	3,107	9	0.3	39,267	267	0.7
St. George, UT	1,391	26	1.9	4,167	–	0
Logan, UT	516	(4)	-0.8	14,367	100	0.7
WYOMING	**3,198**	**273**	**9.3**	**10,633**	**267**	**2.6**
Cheyenne, WY	524	48	10.0	1,300	–	0
Casper, WY	390	-	0.0	1,833	33	1.9

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 2023 - Sept. 2023 and July 2022 - Sept. 2022. 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.

In 2024, it hasn't been all about homebuilding and population growth in this fast-growing region, as is often the case. Other major projects include transmission lines, wind and solar farms, data centers and EV plants. The Sun Zia transmission line that will carry power across Arizona and New Mexico was estimated at $4.5-billion when it broke ground in September. Two other new billion-dollar projects are the $1-billion American Battery Factory plant in Tucson, AZ, and the $1-billion Optima McDowell Mountain Village in North Scottsdale, AZ.

% OF 2024 U.S. SALES

8.8%

MOUNTAIN

In the energy market, the $738-million Rock Creek wind farm broke ground in Laramie, WY and the $525-million Cedar Springs wind farm is underway in Converse County, WY; and the $375-million 360MW Atrisco solar farm is being built in Rio Ranch, NM.

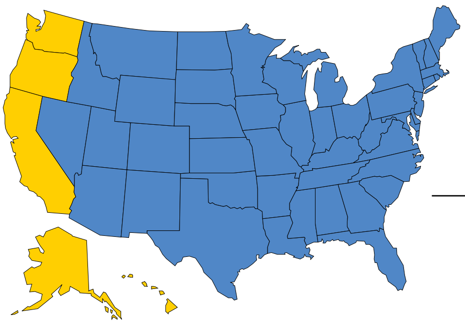
SALES POTENTIAL BY STATE ($ MILLIONS)

	2024 Total Sales $ Potential	% of Region	Electrical Contractor $ Potential	Industrial $ Potential
Mountain	**12,966.0**		**8,496.1**	**1876.7**
Arizona	3,225.0	24.9%	2,064.5	515.5
Colorado	2,886.5	22.3%	1,896.9	412.3
Idaho	1,173.1	9.0%	746.6	191.9
Montana	586.4	4.5%	407.6	61.5
New Mexico	779.6	6.0%	543.4	80.2
Nevada	1,688.3	13.0%	1,167.4	183.2
Utah	2,277.0	17.6%	1,417.7	403.9
Wyoming	350.2	2.7%	251.9	28.2

METROS WITH THE MOST SALES POTENTIAL

(in millions of dollars)

Rank	Area	2023 Total $ Potential	Electrical Contractor $ Potential	Industrial $ Potential
1	Phoenix-Mesa-Scottsdale, AZ	2,547.6	1,643.0	395.1
2	Denver-Aurora-Lakewood, CO	1,698.2	1,164.4	194.2
3	Las Vegas-Henderson-Paradise, NV	1,157.1	843.2	82.5
4	Salt Lake City, UT	992.7	625.0	169.1
5	Boise City, ID	571.0	377.2	79.6
6	Provo-Orem, UT	490.6	330.1	62.4
7	Ogden-Clearfield, UT	436.1	244.8	104.1
8	Albuquerque, NM	409.9	280.9	47
9	Reno, NV	400.5	242.0	78.4
10	Tucson, AZ	356.5	206.2	79



Pacific

Alaska • California • Hawaii • Oregon • Washington

At least 28 projects topping $100-million in total contract value entered the 2023 construction pipeline in the Pacific Region. The largest were the $1.4-billion Midfield Satellite Concourse at Los Angeles' LAX Airport; the billion-dollar UC San Diego 2,400-bed residential village and student center in La Jolla and that university's $927-million Research Park in San Diego. As you can imagine in this tech-heavy and environmentally friendly region, construction of big renewable projects and life sciences facilities were also amongst the biggest jobs in 2024, including the $813-million Bellefield solar farm and battery facility underway in California City, CA; the $650-million Group 14 battery plant being built in Moses Lake, WA; and Phases 3 & 4 of the $634-million Kilroy Oyster Point Life Sciences Complex in San Francisco in the planning stage. Another sizeable job includes a $520-million, 100MW Sabey data center to be built in Umatilla OR.

% OF 2024 U.S. SALES

16.1%

PACIFIC

SALES POTENTIAL BY STATE ($ MILLIONS)

	2024 Total Sales $ Potential	% of Region	Electrical Contractor $ Potential	Industrial $ Potential
Pacific	**23,702.3**		**14,057.8**	**4,904.0**
Alaska	295.3	1.2%	194.9	41.3
California	16,555.2	69.8%	9,673.1	3,571.1
Hawaii	527.1	2.2%	387.4	34.2
Oregon	2,296.1	9.7%	1,319.3	517.5
Washington	4,028.7	17.0%	2,483.0	739.9

METROS WITH THE MOST SALES POTENTIAL

(in millions of dollars)

Rank	Area	2023 Total $ Potential	Electrical Contractor $ Potential	Industrial $ Potential
1	Los Angeles-Long Beach-Anaheim, CA	4,940.1	2,684.8	1267.3
2	Seattle-Tacoma-Bellevue, WA	2,353.5	1,433.4	449.4
3	San Francisco-Oakland-Hayward, CA	2,193.9	1,337.8	417.3
4	Riverside-San Bernardino-Ontario, CA	1,881.7	1,247.7	257.7
5	Portland-Vancouver-Hillsboro, OR	1,592.4	942.5	331.4
6	San Diego-Carlsbad, CA	1,522.7	905.6	312.5
7	San Jose-Sunnyvale-Santa Clara, CA	1,324.7	581.3	478.4
8	Sacramento-Roseville-Arden-Arcade, CA	1,134.4	798.1	109.4
9	Fresno, CA	384.8	234.2	73.7
10	Urban Honolulu, HI	382.2	280.6	25.2

EMPLOYMENT STATISTICS

Area	Electrical Contractor Estimate	YOY # Change	YOY % Change	Industrial Employment	YOY # Change	YOY % Change
ALASKA	**2,474**	**69**	**2.9**	**41.3**	**(1,900)**	**-10.9**
Anchorage, AK	1,517	(30)	-2.0	6.5	(100)	-3.9
Fairbanks, AK	386	9	2.3	1.6	–	0
CALIFORNIA	**122,794**	**2,227**	**1.8**	**3571.1**	**(6,867)**	**-0.5**
Los Angeles-Long Beach-Anaheim, CA	34,082	273	0.8	1267.3	(1,033)	-0.2
San Francisco-Oakland-Hayward, CA	16,982	637	3.9	417.3	1,300	0.8
Riverside-San Bernardino-Ontario, CA	15,838	667	4.4	257.7	(2,500)	-2.5
San Diego-Carlsbad, CA	11,496	13	0.1	312.5	200	0.2
San Jose-Sunnyvale-Santa Clara, CA	7,380	312	4.4	478.4	(1,800)	-1
Sacramento-Roseville-Arden-Arcade, CA	10,131	(147)	-1.4	109.4	(200)	-0.5
Fresno, CA	2,973	13	0.4	73.7	(433)	-1.5
Oxnard-Thousand Oaks-Ventura, CA	2,349	35	1.5	72.3	–	0
Santa Rosa, CA	2,223	69	3.2	64	(133)	-0.5
Stockton-Lodi, CA	2,028	17	0.9	61.7	(267)	-1.1
Bakersfield, CA	2,045	(113)	-5.2	33.7	(33)	-0.3
Modesto, CA	1,434	(52)	-3.5	63.3	(1,100)	-4.4
Vallejo-Fairfield, CA	1,616	(26)	-1.6	29.6	(100)	-0.9
Santa Maria-Santa Barbara, CA	1,283	13	1.0	33.2	200	1.6
Visalia-Porterville, CA	997	(4)	-0.4	37.5	133	1
San Luis Obispo-Paso Robles-Arroyo Grande, CA	1,179	(17)	-1.4	22.7	400	4.9
San Rafael, CA Metropolitan Division, CA	1,040	9	0.8	11.7	133	3.1
Napa, CA	589	13	2.3	39	(267)	-1.8
Salinas, CA	897	(26)	-2.8	13.9	–	0
Santa Cruz-Watsonville, CA	680	9	1.3	21.5	(33)	-0.4
Merced, CA	429	–	0.0	28.5	(167)	-1.5
Chico, CA	555	–	0.0	12.9	133	2.8
Redding, CA	585	(4)	-0.7	7.8	33	1.1
Yuba City, CA	429	22	5.3	6.1	–	0
Madera, CA	282	(4)	-1.5	8.9	(67)	-1.9
El Centro, CA	260	(4)	-1.6	6.6	67	2.7
Hanford-Corcoran, CA	165	9	5.6	14.1	200	3.9
HAWAII	**4,918**	**56**	**1.2**	**34.2**	**233**	**1.8**
Urban Honolulu, HI	3,562	74	2.1	25.2	233	2.5
Kahului-Wailuku-Lahaina, HI	620	13	2.1	3.4	67	5.4

(Continued on page 29)

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 2023 - Sept. 2023 and July 2022 - Sept. 2022. 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.

(EAST NORTH CENTRAL — *Continued from page 20*)

EMPLOYMENT STATISTICS

Area	Electrical Contractor Estimate	YOY # Change	YOY % Change	Industrial Employment	YOY # Change	YOY % Change
OHIO	**33,284**	**1,668**	**5.3**	**689,000**	**3,600**	**0.5**
Cincinnati, OH	6,977	199	2.9	121,867	3,267	2.8
Cleveland-Elyria, OH	5,694	329	6.1	119,700	633	0.5
Columbus, OH	7,111	594	9.1	73,767	(667)	-0.9
Toledo, OH	2,110	143	7.3	44,167	(1,467)	-3.2
Dayton, OH	2,063	156	8.2	40,767	(900)	-2.2
Akron, OH	2,149	113	5.5	37,933	200	0.5
Youngstown-Warren-Boardman, OH-PA	1,391	56	4.2	26,700	167	0.6
Canton-Massillion, OH	1,170	48	4.2	25,333	(100)	-0.4
Mansfield, OH	325	13	4.2	9,233	(100)	-1.1
Lima, OH	286	13	4.8	8,300	(100)	-1.2
Weirton-Steubenville, OH	247	(4)	-1.7	5,000	33	0.7
Springfield, OH	178	9	5.1	6,333	67	1.1
WISCONSIN	**18,659**	**503**	**2.8**	**482,867**	**(3,833)**	**-0.8**
Milwaukee-Waukesha-West Allis, WI	4,762	78	1.7	116,100	567	0.5
Madison, WI	2,778	191	7.4	39,900	633	1.6
Appleton, WI	1,417	82	6.2	25,767	467	1.8
Green Bay, WI	1,161	30	2.7	32,067	(133)	-0.4
Oshkosh-Neenah, WI	849	30	3.7	21,300	(67)	-0.3
Racine, WI	468	26	5.9	19,400	1,067	5.8
Sheboygan, WI	342	13	3.9	22,200	(67)	-0.3
Wausau, WI, WI	399	22	5.7	19,233	167	0.9
Eau Claire, WI	589	22	3.8	11,500	267	2.4
Janesville-Beloit, WI	542	30	5.9	11,367	167	1.5
Fond du Lac, WI	490	26	5.6	12,233	233	1.9
La Crosse-Onalaska, WI	442	22	5.2	9,300	233	2.6

(PACIFIC — *Continued from page 28*)

EMPLOYMENT STATISTICS

Area	Electrical Contractor Estimate	YOY # Change	YOY % Change	Industrial Employment	YOY # Change	YOY % Change
OREGON	**16,748**	**1,192**	**7.7**	**517.5**	**(1,900)**	**-1**
Portland-Vancouver-Hillsboro, OR	11,964	1,192	11.1	331.4	(3,600)	-2.8
Salem, OR	1,824	43	2.4	32.5	(333)	-2.6
Eugene, OR	1,057	9	0.8	39.8	100	0.7
Bend-Redmond, OR	1,144	56	5.2	16.4	(67)	-1.1
Medford, OR	741	26	3.6	20	67	0.9
Albany, OR	455	13	2.9	21.8	33	0.4
Corvallis, OR	221	22	10.9	8.2	(67)	-2.1
Grants Pass, OR	169	4	2.6	8	(67)	-2.2
WASHINGTON	**31,521**	**178**	**0.6**	**739.9**	**5,600**	**2**
Seattle-Tacoma-Bellevue, WA	18,196	420	2.4	449.4	7,333	4.5
Spokane-Spokane Valley, WA	2,284	4	0.2	47	(167)	-0.9
Kennewick-Richland, WA	1,408	(30)	-2.1	25.5	100	1
Bellingham, WA	1,131	(26)	-2.2	24.1	(167)	-1.8
Olympia-Tumwater, WA	988	4	0.4	9.2	33	1
Yakima, WA	611	–	0.0	24	167	1.9
Mount Vernon-Anacortes, WA	594	(4)	-0.7	16.4	–	0
Longview, WA	546	(13)	-2.3	18.8	–	0
Bremerton-Silverdale, WA	680	4	0.6	7.3	(67)	-2.4
Wenatchee, WA	451	(22)	-4.6	7.7	(33)	-1.1
Walla Walla, WA	182	–	0.0	12.6	100	2.1

(SOUTH ATLANTIC — *Continued from page 22*)

EMPLOYMENT STATISTICS

Area	Electrical Contractor Estimate	YOY # Change	YOY % Change	Industrial Employment	YOY # Change	YOY % Change
GEORGIA	**29,120**	**1,222**	**4.4**	**418,300**	**700**	**0.2**
Atlanta-Sandy Springs-Roswell, GA	18,872	901	5.0	174,700	(2,633)	-1.5
Augusta-Richmond County, GA	2,414	113	4.9	25,500	633	2.5
Savannah, GA	1,231	48	4.0	19,900	500	2.6
Columbus, GA	650	4	0.7	10,333	267	2.6
MARYLAND	**22,204**	**741**	**3.5**	**109,633**	**(1,067)**	**-1**
Baltimore-Columbia-Towson, MD	11,349	676	6.3	57,633	(1,300)	-2.2
Silver Spring-Frederick-Rockville MD, MD	4,576	247	5.7	20,800	733	3.7
Calvert-Charles-Prince George's, MD	4,320	(69)	-1.6	–	–	–
Baltimore City, MD	1,343	(22)	-1.6	–	–	–
Hagerstown-Martinsburg, MD	581	13	2.3	9,967	(67)	-0.7
NORTH CAROLINA	**32,517**	**17**	**0.1**	**474,733**	**(867)**	**-0.2**
Charlotte-Concord-Gastonia, NC	9,876	269	2.8	109,167	(1,867)	-1.7
Raleigh, NC	6,309	217	3.6	35,733	1,833	5.4
Greensboro-High Point, NC	2,292	(35)	-1.5	50,633	(100)	-0.2
Winston-Salem, NC	1,655	52	3.2	34,533	(833)	-2.4
Durham-Chapel Hill, NC	1,296	4	0.3	29,900	667	2.3
Asheville, NC	1,378	(4)	-0.3	22,133	(67)	-0.3
Hickory-Lenoir-Morganton, NC	667	(9)	-1.3	41,333	(533)	-1.3
Wilmington, NC	1,361	9	0.6	6,233	167	2.7
Fayetteville, NC	789	(4)	-0.5	8,567	–	0
Rocky Mount, NC	338	–	0.0	11,167	700	6.7
Greenville, NC	481	4	0.9	6,867	67	1
Burlington, NC	416	–	0.0	8,800	(67)	-0.8
SOUTH CAROLINA	**14,486**	**217**	**1.5**	**262,767**	**(267)**	**-0.1**
Greenville-Anderson-Mauldin, SC	2,895	104	3.7	59,800	(1,933)	-3.1
Charleston-North Charleston, SC	2,973	130	4.6	32,033	1,533	5
Columbia, SC	2,214	(4)	-0.2	32,267	500	1.6
Spartanburg, SC	1,010	30	3.1	38,400	233	0.6
Myrtle Beach-Conway-North Myrtle Beach, SC	1,603	52	3.4	5,467	67	1.2
VIRGINIA	**28,037**	**373**	**1.3**	**245,933**	**67**	**0**
Northern Virginia, VA	11,137	485	4.6	–	–	–
Virginia Beach-Norfolk-Newport News, VA	5,473	100	1.9	58,633	633	1.1
Richmond, VA	5,473	(91)	-1.6	32,133	(433)	-1.3
Roanoke, VA	1,265	30	2.5	16,867	533	3.3
Lynchburg, VA	802	17	2.2	14,867	–	0
Charlottesville, VA	797	9	1.1	4,567	67	1.5
WEST VIRGINIA	**4,394**	**121**	**2.8**	**45,767**	**(567)**	**-1.2**
Huntington-Ashland, WV	919	(78)	-7.8	11,833	33	0.3
Charleston, WV	888	(17)	-1.9	2,933	(33)	-1.1

Moving the Needle on Market Share

This 10-step plan will help you build market share.

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Sales budgeting, forecasting and market planning are crucial components of any organization's overall success. Each plays a significant role in determining the company's direction, revenue projections, resource allocations and overall financial health.

Market share is a key factor in this process as it directly impacts an organization's sales targets and strategies. DISC provides full distribution marketplace sizing for both the supply and demand side and can assist with share calculations. Below is our guidance on the sales budgeting process, some steps you can take during the process, and how they relate to market share.

#1 DEVELOP A MARKET OVERVIEW

The first step in the sales budgeting process is getting a comprehensive market analysis overview. Understanding the total market size and looking at it from the primary electrical verticals (construction, industrial, institutional and utility) is a solid starting point. From here we want to know the areas of growth and the areas of slowing to help identify market trends, understand customer preferences and target areas of weakness and opportunity. Market share data is vital at this stage as it helps the company gauge its position relative to competitors. By knowing your current market share, organizations can set realistic goals for growth.

#2 BUILD A YOUR FORECAST

Sales forecasting is the cornerstone of the sales budgeting process. It involves making educated predictions about future sales based on historical data, market trends and other relevant factors. Simply divide sales by market size to get a benchmark share calculation. Geographical information is key in performance measurement and planning and national, state, county and zip code data should all be considered in the calculations. National, regional and more granular sales territory should also be considered. Market share data becomes crucial, as it can help determine your current position and the potential for capturing a larger portion of the market and for maintaining the existing share.

By Chris Sokoll, DISC Corp.

#3 ESTABLISH ACHIEVABLE SALES TARGETS

Using the sales forecast and market share data, organizations can establish specific sales targets. These targets should be both realistic and ambitious, considering the company's growth objectives. Market share goals may include maintaining the current share, increasing it or even entering new markets to gain a share.

#4 CONSTRUCT A BUDGET

With sales targets in place, budgeting and resource allocation become critical steps. This involves determining how many resources (financial, personnel, facilities and otherwise) will be needed to achieve the sales goals. Market share data based on current and past resources is useful in making informed decisions about the level of investment required to compete and meet sales targets effectively.

#5 DEVELOP WINNING SALES STRATEGIES

Once the budget is allocated, developing sales strategies is vital to winning market share. These strategies should align with the market share objectives. For example, if the goal is to increase market share within a vertical market, strategies might include expanding product lines, entering new geographic markets, targeting specific industries or intensifying marketing efforts.

#6 REGULARLY MONITOR SALES PERFORMANCE

Regular monitoring of sales performance against the budget and the market is crucial. Market share data provides insight into whether the strategies are effective in achieving the desired market share goals. If market share is not increasing as planned, adjustments to strategies or resource allocation may be necessary.

#7 TRACK COMPETITORS' MARKET ACTIVITY

Any discussion of market share must take competitors into account. It's essential to continuously analyze competitors' actions, acquisitions, staffing and market share changes. Understanding their strategies and market share trends can help refine your own approach and identify potential opportunities or threats.

#8 ENGAGE WITH CUSTOMERS

Deep customer engagement is vital to maintain or grow market share. Building and maintaining a strong customer relationship through shared and planned goals with scheduled progress reviews is a great strategy. The key is to become an integral part in your customers' operations and processes. Engaging with customers through feedback, surveys, and market research can help align products and services with customer needs and preferences. Not everyone has the time and resources to accomplish this internally. David Gordon and his company Channel Marketing Group *(www.channelmkt.com)* offers this type of market research and can provide guidance on how to get the most value from the research.

#9 FOCUS ON INNOVATION

Innovation also plays a crucial role in market share growth. Understanding innovation from within your customers' organizations and understanding leading-edge industry innovation can open new markets. Leaders must continually update their knowledge about new technologies, products and services to differentiate themselves from competitors.

Market share objectives should consider how innovation can help gain a competitive edge. Communication, both internal and external, should be a key part of any innovation and differentiation strategy.

#10 PLAN FOR GROWTH

Sales budgeting is not just about short-term goals. Organizations should also have long-term plans and targets for market share growth. This may involve researching and planning to enter future emerging markets, staying on top of policy changes and regulations that can drive new business and of course building a strong brand presence over time.

In conclusion, sales budgeting is a dynamic process that relies heavily on market share data and analysis. It guides organizations in setting realistic sales targets, allocating resources effectively and developing strategies to either maintain or increase their market share. Market share is not just a static metric or just another statistical benchmark; it's a critical factor that informs decision-making throughout the budgeting process and is closely tied to a company's overall success and growth in the marketplace.

DISC has provide thoughtful and reliable market intelligence and forecasts for both the supply and the demand side of the electrical distribution community since 1985. We are here to help you understand your market and plan a roadmap to success. **EW**

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 / (346) 339-7528.

advertiser's index

Turtle (Clark, NJ): **Jayne Millard,** executive chairman of the board and fourth-generation family leader, and **Luis Valls,** president of Turtle's Electrical Division will head the company as co-CEOs. As a 30-year industry veteran with over 20 years at Turtle, Valls' resume includes high-profile projects such as the World Trade Center reconstruction, NYU Langone Medical Center and Hudson Yards.

Millard

Valls

In keeping with a multi-year succession management plan, **Kathleen Shanahan,** who served as CEO, will assume a senior advisory role. Turtle sustains its decades-long certification as a WBE. As a senior advisor, Shanahan will focus her strategic business and government policy experience on Turtle's government relations and public affairs, touching the company's national, state and municipal projects.

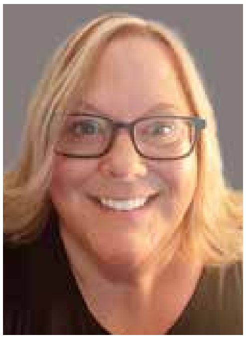
ABB (Memphis, TN): **Jack Bellissimo** joins ABB's Installation Products Division, formerly known as Thomas & Betts, as senior VP of Product Management, Marketing and Strategy, leading the U.S. and Latin America region portfolio of electrification solutions. Bellissimo joined ABB from Hubbell Electrical Products, where he was the VP of Marketing and Product Management. Before that, he held sales and product leadership roles at Hubbell and Michelin, as well as operations and supply chain management roles at GE Power. Bellissimo also served five years as an Airborne Army Ranger and a senior intelligence analyst with the 75th Ranger Regiment, U.S. Army. He deployed three times to Afghanistan in support of Operation Enduring Freedom and received a Bronze Star Medal.

Bellissimo

In other news at ABB, **Chris Marlow** joined ABB Installation Products, leading its U.S. channel organization and strategic initiatives focused on further strengthening relationships with electrical distribution and retail partners. He and the account management team will work with partners to enhance the customer experience through service and loyalty programs as well as sales strategies and training.

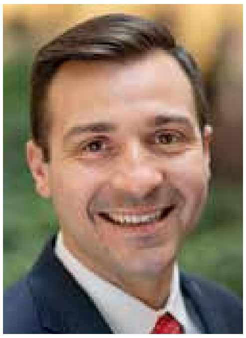
Champion Fiberglass (Houston): **Matt Fredericks** was promoted to director of North American Business Development. In this new role, he will assist the VP of Sales and Marketing in developing high-level relationships within the electrical and utility contractor/end-user markets to increase Champion Fiberglass' market awareness and sales revenues. Fredericks joined Champion Fiberglass in January 2021.

Omni Cable LLC (OmniCable), (West Chester, PA): **Nikki Douglass** joined the company as director of Sales, Datacom Business Unit and will lead a team of datacom sales specialists to support the OmniCable sales team. She has over 30 years of experience in the datacom industry. Prior to OmniCable, she spent 18 years with CSC/WESCO, leading the New York City Datacom business for nine years.



Douglass

Rexel USA (Dallas): The company recently hired **Tim Ryan** to be the new Midwest region president. He brings 17 years of experience in the industrial supply space, most recently as W.W. Grainger's regional sales VP for national accounts.



Ryan

Ideal Industries (Sycamore, IL): **Doug Sanford** was promoted to COO, a new position for the company. In this role, he manages the three global brands under the Ideal Industries umbrella: Ideal Electrical, Anderson Power and Enatel.

REP NEWS

D.Z. Cook Co. now represents Eaton's product portfolio for B-Line, Bussmann, Crouse-Hinds Commercial and Wiring Device divisions in northern California and northern Nevada.

Chalfant Manufacturing announced a shift in representation in the Intermountain region and the U.S. Mountain West region. **ASA Electrical Solutions** has assumed the role in Idaho and Utah.

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State-Level Electrical Product Sales Potential in 17 product groups

Updated annually

Electrical Marketing's estimates for state-level electrical sales potential are based on product mix data from more than 100 Top 200 electrical distributors.

Local Electrical Market Indicators

Updated quarterly

Keep tabs on building permits, gross metropolitan product, population growth and employment trends in core market segments.

OTHER MARKET DATA

Local Construction Projects

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Electrical Market Indicators

Regular posts on the key electrical market indicators shaping this industry.

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