

2025 ELECTRICAL PYRAMID

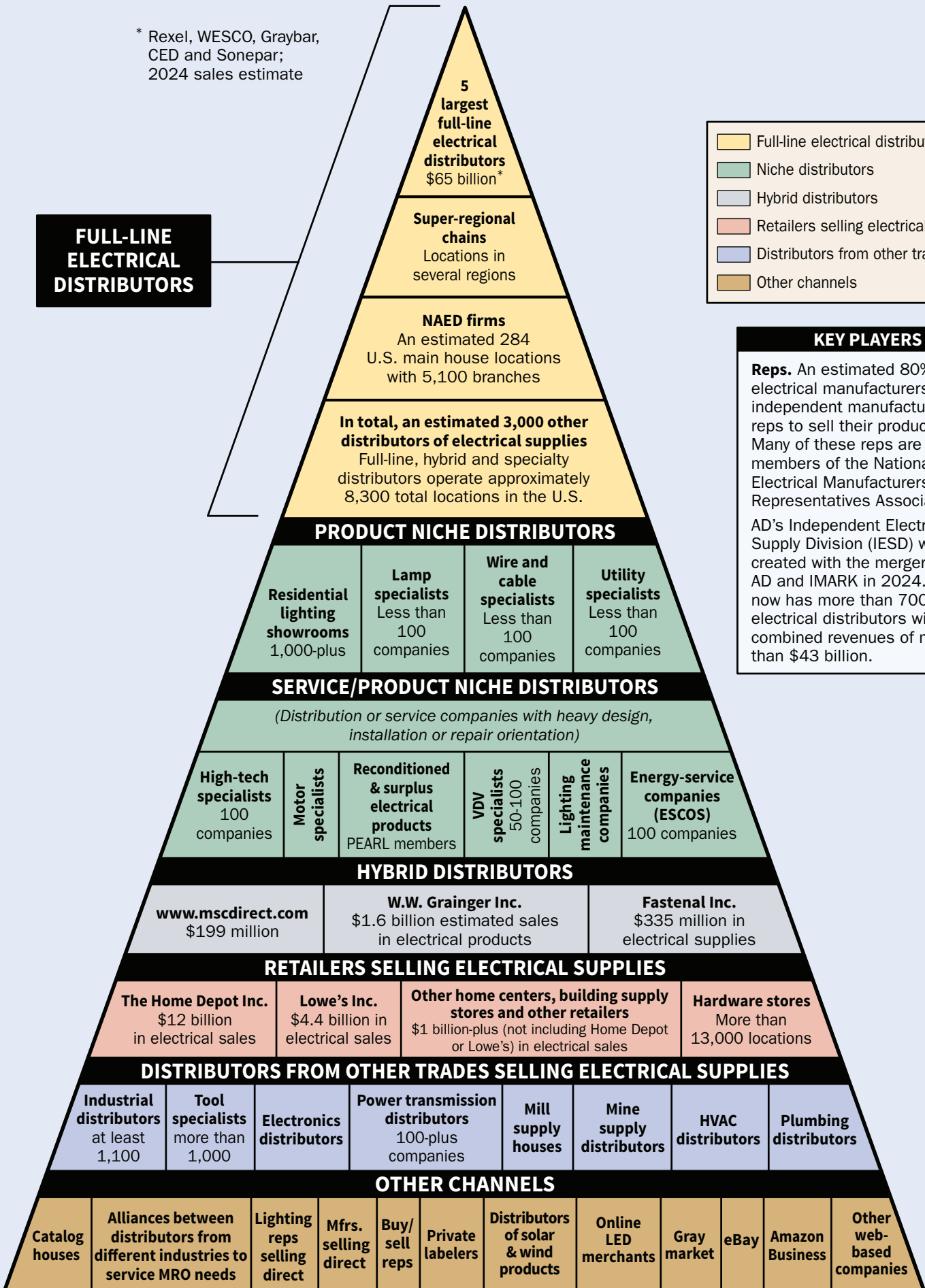
* Rexel, WESCO, Graybar, CED and Sonepar; 2024 sales estimate

FULL-LINE ELECTRICAL DISTRIBUTORS

- Full-line electrical distributors
- Niche distributors
- Hybrid distributors
- Retailers selling electrical supplies
- Distributors from other trades
- Other channels

KEY PLAYERS

Reps. An estimated 80% of all electrical manufacturers use independent manufacturers' reps to sell their products. Many of these reps are members of the National Electrical Manufacturers Representatives Association. AD's Independent Electrical Supply Division (IESD) was created with the merger of AD and IMARK in 2024. IESD now has more than 700 electrical distributors with combined revenues of more than \$43 billion.



5 largest full-line electrical distributors
\$65 billion*

Super-regional chains
Locations in several regions

NAED firms
An estimated 284 U.S. main house locations with 5,100 branches

In total, an estimated 3,000 other distributors of electrical supplies
Full-line, hybrid and specialty distributors operate approximately 8,300 total locations in the U.S.

PRODUCT NICHE DISTRIBUTORS

Residential lighting showrooms
1,000-plus

Lamp specialists
Less than 100 companies

Wire and cable specialists
Less than 100 companies

Utility specialists
Less than 100 companies

SERVICE/PRODUCT NICHE DISTRIBUTORS

(Distribution or service companies with heavy design, installation or repair orientation)

High-tech specialists
100 companies

Motor specialists

Reconditioned & surplus electrical products
PEARL members

VDV specialists
50-100 companies

Lighting maintenance companies

Energy-service companies (ESCOS)
100 companies

HYBRID DISTRIBUTORS

www.mscdirect.com
\$199 million

W.W. Grainger Inc.
\$1.6 billion estimated sales in electrical products

Fastenal Inc.
\$335 million in electrical supplies

RETAILERS SELLING ELECTRICAL SUPPLIES

The Home Depot Inc.
\$12 billion in electrical sales

Lowe's Inc.
\$4.4 billion in electrical sales

Other home centers, building supply stores and other retailers
\$1 billion-plus (not including Home Depot or Lowe's) in electrical sales

Hardware stores
More than 13,000 locations

DISTRIBUTORS FROM OTHER TRADES SELLING ELECTRICAL SUPPLIES

Industrial distributors
at least 1,100

Tool specialists
more than 1,000

Electronics distributors

Power transmission distributors
100-plus companies

Mill supply houses

Mine supply distributors

HVAC distributors

Plumbing distributors

OTHER CHANNELS

Catalog houses

Alliances between distributors from different industries to service MRO needs

Lighting reps selling direct

Mfrs. selling direct

Buy/sell reps

Private labelers

Distributors of solar & wind products

Online LED merchants

Gray market

eBay

Amazon Business

Other web-based companies