2021 MARKET PLANNING GUIDE

Although market conditions will remain challenging next year, some sales opportunities exist in select construction niches and geographic market areas.

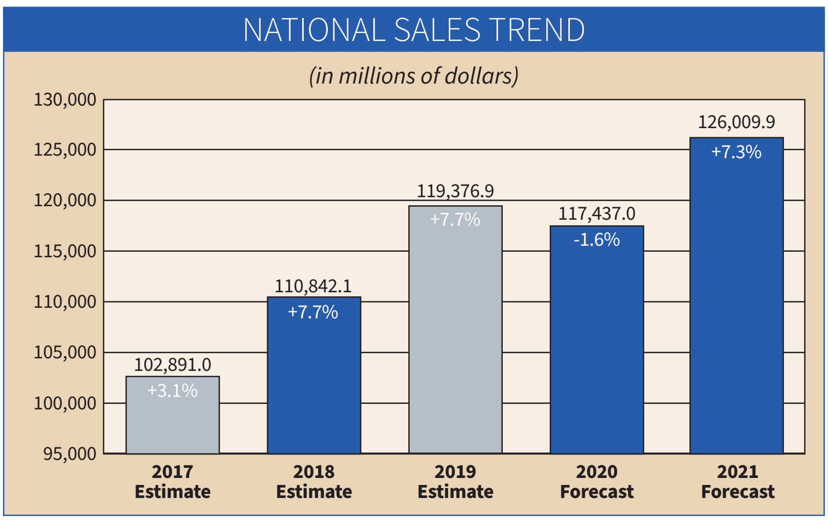
By Jim Lucy, Editor-in-Chief; Elinor Delagrange, Senior Research Manager; and David Eckhart, Senior Art Director

Readers of *Electrical Wholesaling* rely on our Market Planning Guide issue each November to provide a little dose of sanity to their annual strategic planning process. We will try our best to once again provide that much-need security blanket, but with all of the uncertainty over the future impact of the COVID-19 coronavirus on the U.S. and global economies, it has been a particularly tough year to produce a realistic electrical sales forecast.

Over the years, the electrical distributors who respond to the annual survey that we use to develop our sales forecast have always been a pretty optimistic bunch, and more often than not their optimism has been right on the money.

This year's respondents seem particularly bullish in their prognostications. As a group, they believe total U.S. sales through electrical distributors will decline only -1.6% in 2020 and bounce back +7.3% in 2021. While *EW's* editors admire their optimism, both forecasts strike us as a bit too far down the sunny side of the street and about two points better than what our gut instinct is telling us.

One reason these forecasts seem a bit too strong is how much they diverge from what has normally been a surprisingly close correlation with the national sales forecasts produced by DISC Corp., Houston. Although we use different methods to develop our annual forecasts, in many years they are within a few points of each other. This isn't one of those years.



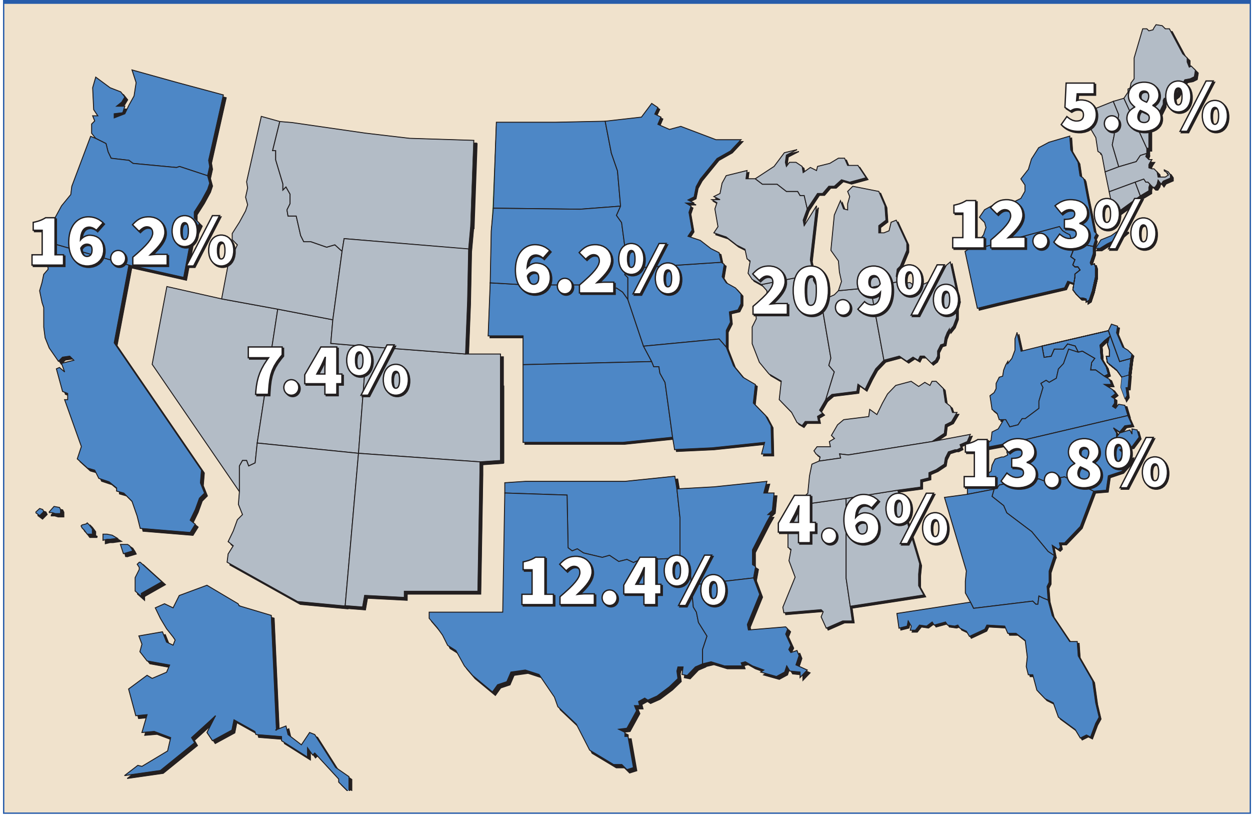
As you will read in the article on page 34 by DISC President Christian Sokoll, his firm sees a -9.4% decline in 2020 followed by a +4.8% increase in 2021.

WHAT OTHER ECONOMISTS SEE FOR 2021

While we were surprised by the large difference in our 2020 forecasts, it's not at all unusual for research firms and economists that publish forecasts on the same subject matter to come up with very different data. For example, you don't have to look much further than the wide range of political surveys for the November elections to see some rather large variances in outlooks. And consider the widely respected Consensus Construction Forecast published by the American Institute of Architects (AIA), which blends forecasts from eight different construction economists. AIA's 2020 Consensus Construction Forecast for the all-important nonresidential construction category is a -8.1% decline in 2020, followed by a -4.8% decline in 2021.

But its panel of economists saw this piece of the construction market very differently, with the folks at Construct-Connect logging the most optimistic 2021 forecast with a decline of -1.4%, while Moody's Analytics pegged the decline at -9.4%. And for 2020, Markstein Advisors said the nonresidential construction market would only decline -2.8%, while IHS Economics was much

PERCENTAGE OF 2021ELECTRICAL DISTRIBUTORS' SALES BY REGION



more pessimistic, with a forecast of a -14.1% decline.

Despite the variance in some of the forecasts by construction industry economists from Dodge Data & Analytics, IHS Economics, Moody's Analytics, FMI, ConstructConnect, Associated Builders & Contractors, Wells Fargo Securities and Markstein Advisors, AIA's annual Consensus Construction Forecast is always a valuable resource, and if you need to get a sense of the construction scene at the macro level, be sure to bookmark it at *www.info.aia.org/aiarchitect/2020/charts/july2020/ccf_072420.html.*

Kermit Baker, AIA's chief economist, always provides some interesting analysis of the construction market with his AIA Consensus Forecast updates, as well as in AIA's monthly Architecture Billings Index (ABI), which surveys architects across the nation about building conditions. The ABI survey is considered a good leading indicator of future construction activity by nine to 12 months because architects see project information so early in the pipeline.

2021 NATIONAL MULTIPLIERS

Market	Economic Factor	Multiplier
Electrical contractors	Number of electrical contractor employees	$71,828
Industrial MRO	Number of manufacturing employees	$909
Industrial OEM	Number of manufacturing employees	$959
Factory automation	Number of manufacturing employees	$124
Utilities	Number of metered customers	$58
Government	Number of government employees	$258
Mining	Number of employees at mining companies	$662

In the July update of the Consensus Construction Forecast, Baker said some of the construction categories that will continue to suffer into next year include offices, retail and hotel construction. He said AIA expects office construction to decline -11% this year and -8% in 2021, in large part because of a dramatic downturn in office employment and the now well-established trend toward telecommuting because of COVID-19. The coronavirus will also affect new retail construction, which was already suffering because of the popularity of online shopping. Baker said retail construction will continue to decline, sliding -8% in 2020 and -7% in 2021.

As you can imagine, hotel construction has been hit bad because of COVID-19, and AIA anticipates a major decline in 2021. "The hotel construction sector is expected to be the weakest major nonresidential sector, declining over -20% this year and another almost -17% in 2021," said Baker in his update to the Consensus Construction Forecast. "While competition from Airbnb and other online sources were already limiting the need for new hotels, the pandemic has accelerated this weakness. Personal travel has seen a steep decline, but business travel has grown even weaker. The conversion of most conventions and trade shows to virtual events has had a dramatic effect on hotel demand."

AIA's forecasts for institutional construction were a bit more encouraging and the association isn't anticipating declines to be as bad as in the commercial construction sector. Baker said in his update that because institutional building relies more heavily on public and nonprofit funding, and because to date the stock market has been fairly solid, the endowments that often fund these projects may not be hit as hard as previously feared.

"Health care construction is one of the few sectors expected to avoid a recession this cycle," he said. "Even though elective health treatments have fallen off in recent months, demographics remain very positive for health care spending moving forward. One wild card is the long-term trend toward telemedicine, and whether that will continue to be a popular alternative to in-person care. Health care spending is projected to increase over +2% this year and another +3% next."

AIA is calling for some declines in educational construction, after a small gain in 2019. Baker said spending on educational construction is projected to decline almost -7% this year, and another -1% in 2021. "With many schools and colleges relying heavily on virtual teaching for the remainder of 2020, there is less need for additional facilities, and fewer resources to support them," he said. "Additionally, the demographics supporting growth in educational facilities are mixed, with slower growth for college age students leading to a modest net decline in college enrollments in recent years."

NATIONAL SALES-PER-EMPLOYEE

Year	Market Planning Guide	Top 200
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

2021 FORECASTS FOR MAJOR BUSINESS SECTORS

Residential	2.0%
Industrial	-3.8%
Commercial	-0.8%
Institutional	-0.6%
Government	-1.5%
Utilities	-0.5%

HOT LOCAL MARKETS

Electrical Wholesaling's August issue provided readers with a jumpstart on the 2021 strategic planning and plenty of insight into the local markets powering through the current crisis. As we reported in that issue and in last year's Market Planning Guide, you will see plenty of familiar names in our list of hot markets, which once again include Charlotte and Raleigh-Durham, NC; Atlanta; most of Florida's metros; Colorado's Front Range, from Colorado Springs north through Denver, Boulder and Fort Collins; Phoenix; Salt Lake City; and all of Texas' major metros, but particularly Austin and Dallas.

You can measure local market growth in many different ways. If you are interested in the residential market, one measure that allows you to compare metropolitan areas of different sizes is total building permits per 1,000 residents. Through Sept. 2020, some of the smaller and mid-sized Metropolitan Statistical Areas (MSAs) with a permits/per 1,000 residents ratio that's double that of the 4.79 U.S. rate are The Villages, FL (20.39); Austin-Round Rock-Georgetown, TX (13.75); Auburn-Opelika, AL (11.52); Cape Coral-Fort Myers, FL (10.92); Coeur d'Alene, ID (10.85);

While the Dallas and Austin metros have the lion's share of commercial construction in Texas, the $545 million Texas Medical Center being built in Houston by Texas A&M University is one of the larger hospital projects now in the planning stages.

Myrtle Beach-Conway-North Myrtle Beach, SC-NC (10.61); St. George, UT (10.36); Daphne-Fairhope-Foley, AL (9.88); Punta Gorda, FL (9.67); and Nashville-Davidson-Murfreesboro-Franklin, TN (9.66).

Popular project types. You also see some definite trends in the types of projects powering the construction market, particularly in the commercial and industrial markets, and we put together 40 of the larger projects in the chart on page 19, and report on others in the Regional Factbook on pages 24-33. Data centers, multi-family housing and mixed-use downtown redevelopment projects are most common. Along with all of project, sales and employment data you will find in the following pages, be sure to stop by *www.ewweb.com* for some additional resources for your 2020 market planning.

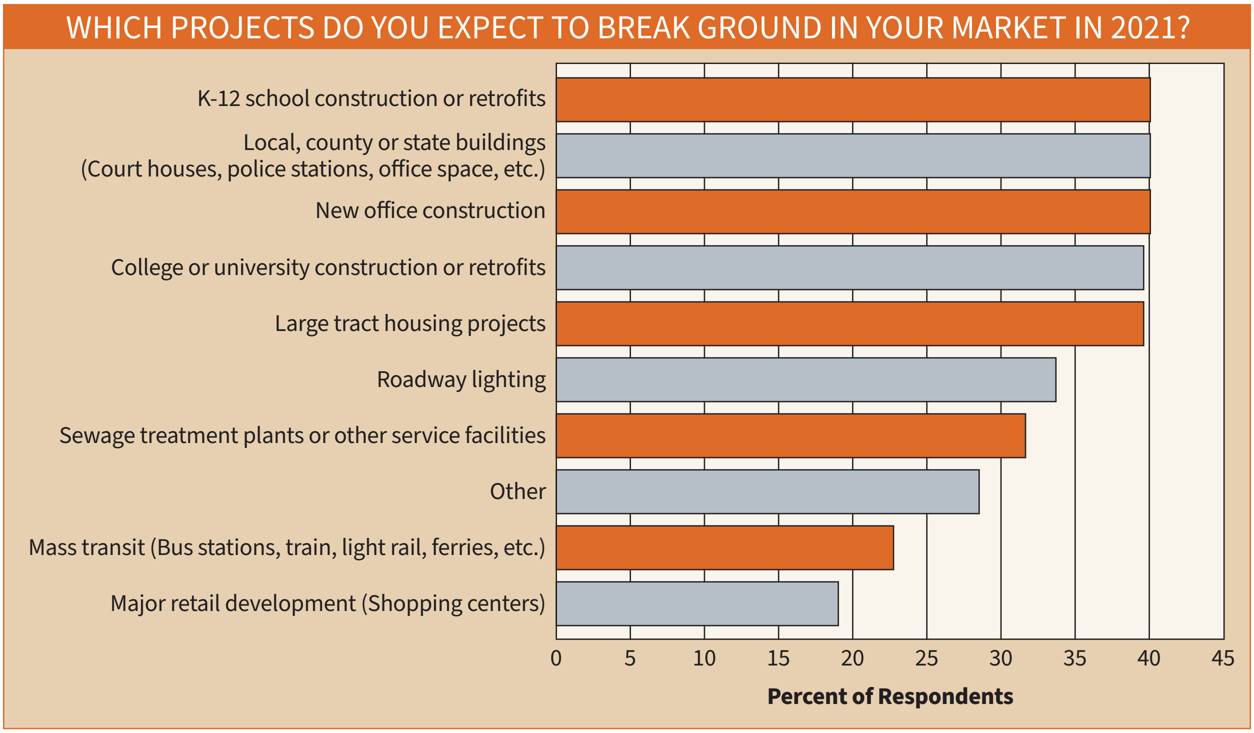
HOW TO USE THE MARKET PLANNING GUIDE

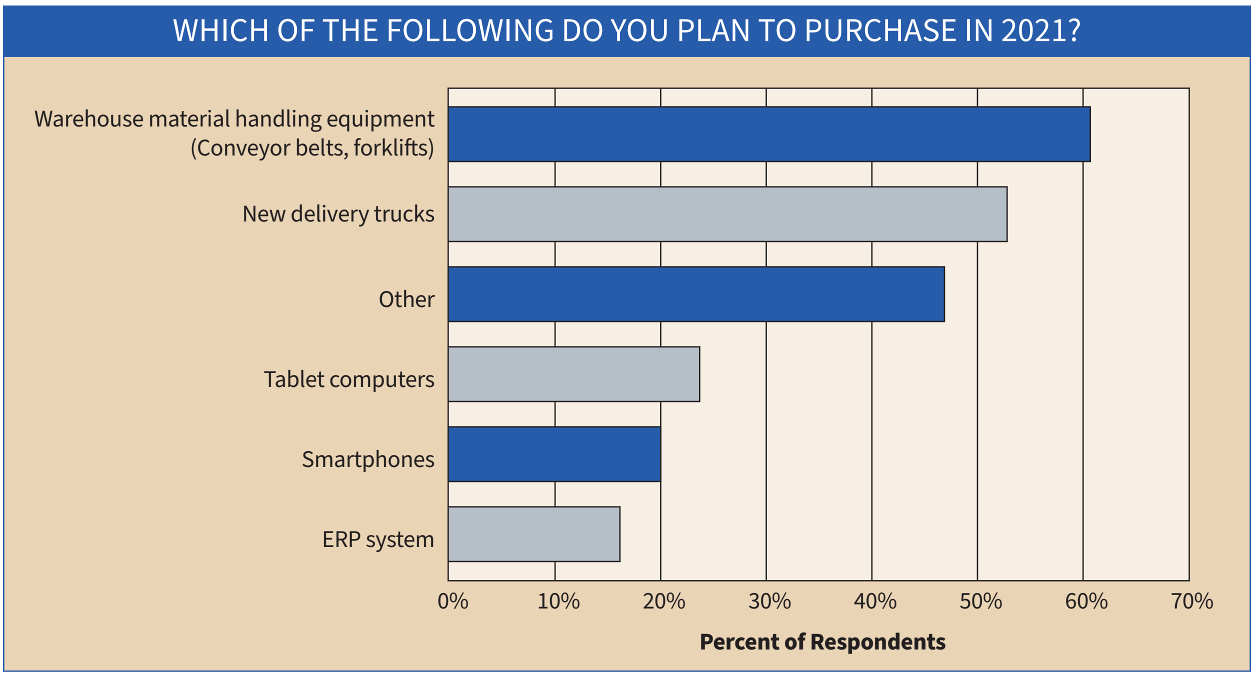
The market planning data in this issue is divided into nine regions of the United States. For each region, you'll find an economic snapshot of the region and employment statistics for the typical distributors' two largest customer groups — electrical contractors and manufacturing employees, as well as sales potential by state and for each region's largest MSAs. We develop those estimates using sales-per-employee multipliers and employment data combined by the U.S. Bureau of Labor Statistics (using a three-month average of employment data from June 2020 through Aug. 2020).

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

Unfortunately, we did not get as a good a response rate as normal for our survey and are not able to provide sales forecasts at the regional level because we did not get enough respondents for each of the nine U.S. Census regions to provide reliable forecasts. Only 151 respondents provided sales forecasts this year, a sharp decline from last year's 271 usable responses. Please respond to next year's survey when you see it — filling it out only takes a few minutes and it helps us produce more reliable electrical sales forecasts. On a national basis, respondents reported a mean sales-per-employee number of $648,465 for 2019, an increase from $636,218 for 2018. Be sure to check how your company's productivity compares with the national data when it comes to sales-per-employee.

A note on our national sales base number. The base sales number for our national sales forecast comes from the Census of Wholesale Trade that the Commerce Department sends out every five years. Data from the most recent survey in 2012 was finally available in 2015 for the category that most closely defines our electrical market — "NAICS: 423610 - Electrical apparatus and equipment, wiring supplies, and related equipment merchant wholesalers" (specifically "Merchant wholesalers, except manufacturers' sales branches and offices"). Although the Commerce Dept. recently published its national numbers for its definition of a distributor of electrical supplies, *EW* will not use this number as a base for its sales

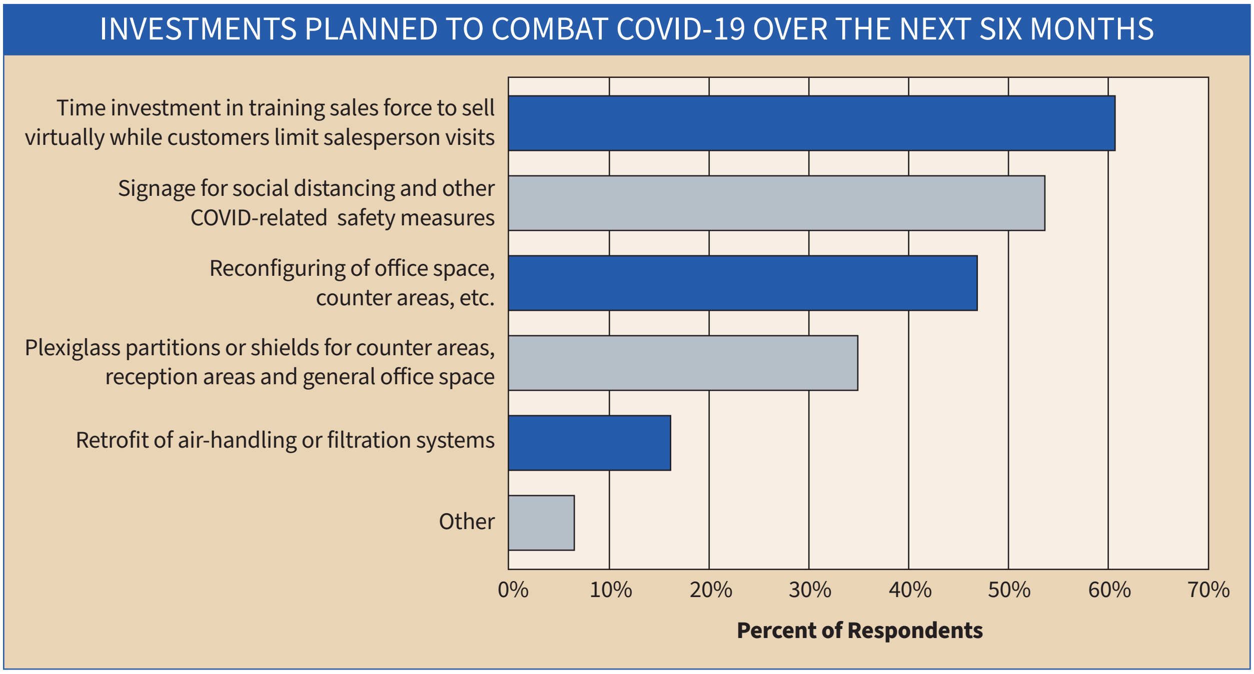




estimates until the Commerce Dept. also publishes its product sales data, which won't be available until Nov. 2020. *EW's* editors need the product data to refine the Commerce Dept.'s sales estimates for electrical wholesalers.

Here's why. The U.S. Commerce Dept. has a very broad definition of an electrical distributor, and its 2017 data shows 8,398 electrical distributors operating 13,801 branch locations and doing $131,748,162 in total combined revenue. *EW's* editors don't believe the Commerce Dept.'s 2017 sales number is accurate because the related product data in the 2012 survey included distributors of HVAC equipment, electronics components and other products not typically carried by full-line distributors of electrical supplies. Including these companies basically doubles the company count for what EW's editors and most veteran industry execs would consider to be distributors of electrical supplies. The huge branch count in the 2012 Commerce Dept. data really sticks out, too, when you compare it to the branch count in *Electrical Whole-*

40 LARGE CONSTRUCTION PROJECTS UNDERWAY OR IN THE PLANNING STAGES: 3Q 2020					
Contract Value ($ Millions)	**Project**	**Location**	**Project Type**	**Status**	**Source**
8,000	Related Cos. Mixed-use project with 5.4 million sq ft of offices and 1,300 apartments	Santa Clara, CA	Mixed-use	Underway	constructiondive.com
7,000	The 78 mixed-use development by the Related Midwest	Chicago, IL	Mixed-use	Underway	constructiondive.com
6,000	Diode Ventures' plan for up to 13 data centers on Kansas City campus	Kansas City, MO	Data center	Proposal	datacenterdynamics.com
5,600	Mayo Clinic's Destination Medical Center	Rochester, MN	Hospital & mixed-use	Underway	constructiondive.com
5,500	Port Covington mixed-use project	Baltimore, MD	Mixed-use	Underway	constructiondive.com
4,000	Multiple state government buildings over the next five years	Sacramento, CA	Government	Underway	sacbee.com
3,100	Federal Way Light Rail link to SeaTac Airport	Seattle, WA	Rail - Mass Transit	Underway	newstribune.com
3,000	San Diego International Airport expansion	San Diego, CA	Airport	Planning process	airport-technology.com
2,700	Newark Airport Terminal 1	Newark, NJ	Airport	Underway	enr.com
2,700	LAX automated people mover system	Los Angeles, CA	Airport	Underway	Dodge Data & Analytics
2,500	The Central - 5 million sq ft of mixed-use space	Dallas, TX	Mixed-use	Underway	dallasnews.com
2,500	Sabine Pass Liquefaction Project	Sabine Pass, LA	Oil & gas	Underway	Dodge Data & Analytics
2,100	Chicago Transit Authority's (CTA) Red and Purple Line Modernization Phase One Project	Chicago, IL	Mass transit	Underway	businesswire.com
1,790	1.9 million-sq-f, Ohio State University Wexner Medical Center Inpatient Hospital	Columbus, OH	Hospital	Approval process	news.osu.edu
1,700	Multiple apartment projects	Orlando, FL	Multi-family	Planned	bizjournals.com
1,670	SK Innovation's two electric vehicle battery plants	Jackson County, GA	Industrial - EV factories	One underway, one planned	Energy-Storage News
1,600	Guernsey Power Station	Pleasant City, OH	Utility	Sept. 20 groundbreaking	construction.com
1,500	65-acre master-planned Metropica	Sunrise, FL	Mixed-use	First building complete	livemetropica.com
1,400	Halley Rise - 3.5-million-sq-ft mixed-use development	Reston, VA	Mixed-use	Underway	multihousingnews.com
1,300	691-ft Winthrop Center	Boston, MA	Office & Mixed-use	Planning stages	prnewswire.com
1,300	Wastewater control plant	San Francisco, CA	Wastewater	Aug. 20 groundbreaking	Dodge Data & Analytics
1,300	Two Manhattan West office building	New York, NY	Office	Broke ground February 2020	construction.com
1,300	NHL Islanders arena and mixed-use at Belmont Park	Belmont Park, NY	Stadium-arena	Underway	nytimes.com
1,100	O'Hare Airport Terminal 5 expansion	Chicago, IL	Airport	Underway	Dodge Data & Analytics
1,100	TSX Broadway Hotel project in Times Square	New York, NY	Hotel	Underway	Dodge Data & Analytics
1,000	Fourth Ward Project, including new 300,000-sq-ft Mailchimp headquarters	Atlanta, GA	Mixed-use	Planning stage	atlantamagazine.com
1,000	Tesla's newest Gigafactory in Austin, TX, area	Del Valle, TX	Industrial	Broke ground Aug. 2020	fox7austin.com
1,000	1085MW Indeck Niles Energy Center power plant	Niles, MI	Utility	Broke ground March 2020	construction.com
1,000	Rental car facility at LAX	Los Angeles, CA	Airport	Underway	construction.com
1,000	15-acre Quay development	Sarasota, FL	Mixed-use	Planned	yourobserver.com
1,000	County Square project	Greenville, SC	Mixed-use	Planned	greenvilleonline.com
1,000	Virginia Tech campus near Amazon 2 headquarters	Alexandria, VA	Educational - College & University	Planned	constructiondive.com
950	Portland International Airport	Portland, OR	Airport	Broke ground April 2020	construction.com
950	Grand Avenue mixed-use building	Los Angeles, CA	Mixed-use	Underway	construction.com
888	Dania Point Clean Energy Center	Dania Point, FL	Utility	Aug. 20 groundbreaking	Dodge Data & Analytics
840	Lynnwood Link Extension	Lynwood, WA	Mass transit	Underway	Dodge Data & Analytics
815	Upgrade to X-ray facility at University of Chicago's Argonne Research Lab	Lemont, IL	Educational	Broke ground July 2020	newsuchigago.edu
800	Facebook data center in Nashville area	Gallatin, TN	Data Center	Planning stage	datacenterknowledge.com
800	Facebook data center	DeKalb, IL	Data center	Planning process	northernstar.info
800	New Valley Hospital	Paramus, NJ	Hospital	Broke ground February 2020	construction.com



saling's most recent Top 200 ranking. The full-line electrical distributors in *EW's* most recent Top 200 operate an estimated 6,969 branches, and if you add in hybrid distributors like Fastenal and W.W. Grainger, that total is around 9,000 locations — still more than 4,000 branches short of the Census estimate.

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

DEVELOPING SALES ESTIMATES

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

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

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

Employment in major customer markets. In addition to sales forecasts, employment numbers make up a large part of the regional profiles. The number of people employed by a company or in an industry tends to rise and fall with the

THE 50 LARGEST SINGLE-FAMILY HOUSING MARKETS						
Name	**1 - Unit Sept. 20**	**1 - Unit YOY # change**	**1 - Unit YOY % Change**	**5 - Units + Sept. 20**	**5 - Units + YOY # change**	**5 - Units + YOY % Change**
Houston-The Woodlands-Sugar Land, TX	35,309	5,191	17.2	15,811	145	0.9
Dallas-Fort Worth-Arlington, TX	31,631	5,136	19.4	11,405	(7,896)	-40.9
Phoenix-Mesa-Chandler, AZ	22,566	3,972	21.4	10,111	3,479	52.5
Atlanta-Sandy Springs-Alpharetta, GA	20,013	(47)	-0.2	2,753	(2,433)	-46.9
Austin-Round Rock-Georgetown, TX	15,327	1,273	9.1	14,945	5,748	62.5
Charlotte-Concord-Gastonia, NC-SC	13,258	1,892	16.6	4,132	(2,012)	-32.7
Tampa-St. Petersburg-Clearwater, FL	11,683	349	3.1	3,102	(3,612)	-53.8
Orlando-Kissimmee-Sanford, FL	11,367	139	1.2	7,184	132	1.9
Nashville-Davidson--Murfreesboro-Franklin, TN	10,429	585	5.9	8,124	2,884	55.0
Washington-Arlington-Alexandria, DC-VA-MD-WV	9,933	77	0.8	7,258	(2,995)	-29.2
Raleigh-Cary, NC	9,365	164	1.8	2,918	270	10.2
Jacksonville, FL	9,342	495	5.6	1,733	(1,270)	-42.3
Riverside-San Bernardino-Ontario, CA	9,030	1,509	20.1	828	(2,377)	-74.2
Denver-Aurora-Lakewood, CO	7,940	(488)	-5.8	4,960	295	6.3
New York-Newark-Jersey City, NY-NJ-PA	7,921	(367)	-4.4	29,337	(298)	-1.0
San Antonio-New Braunfels, TX	7,522	832	12.4	4,511	(973)	-17.7
Las Vegas-Henderson-Paradise, NV	7,269	(162)	-2.2	1,942	(700)	-26.5
Minneapolis-St. Paul-Bloomington, MN-WI	6,952	75	1.1	7,658	(859)	-10.1
Los Angeles-Long Beach-Anaheim, CA	6,733	86	1.3	10,850	(2,406)	-18.2
Seattle-Tacoma-Bellevue, WA	6,618	67	1.0	9,574	(2,336)	-19.6
North Port-Sarasota-Bradenton, FL	6,067	1,236	25.6	690	(1,392)	-66.9
Boise City, ID	5,868	133	2.3	932	(880)	-48.6
Indianapolis-Carmel-Anderson, IN	5,805	560	10.7	2,218	284	14.7
Chicago-Naperville-Elgin, IL-IN-WI	5,741	42	0.7	4,497	(1,890)	-29.6
Portland-Vancouver-Hillsboro, OR-WA	5,714	(189)	-3.2	4,380	(1,624)	-27.0
Philadelphia-Camden-Wilmington, PA-NJ-DE-MD	5,621	177	3.3	3,420	(2,472)	-42.0
Miami-Fort Lauderdale-Pompano Beach, FL	5,460	89	1.7	11,392	645	6.0
Sacramento-Roseville-Folsom, CA	5,147	(82)	-1.6	2,835	1,723	154.9
Myrtle Beach-Conway-North Myrtle Beach, SC-NC	5,092	461	10.0	136	(33)	-19.5
Oklahoma City, OK	5,059	667	15.2	251	(4)	-1.6
Provo-Orem, UT	5,028	913	22.2	439	(177)	-28.7
Lakeland-Winter Haven, FL	4,904	501	11.4	1,240	271	28.0
Cape Coral-Fort Myers, FL	4,761	768	19.2	3,243	1,434	79.3
Greenville-Anderson, SC	4,619	596	14.8	1,030	35	3.5
Kansas City, MO-KS	4,360	889	25.6	3,568	1,060	42.3
Charleston-North Charleston, SC	4,285	477	12.5	2,190	705	47.5
St. Louis, MO-IL	4,265	330	8.4	1,346	(40)	-2.9
Cincinnati, OH-KY-IN	3,980	567	16.6	1,270	321	33.8
Salt Lake City, UT	3,804	491	14.8	3,841	(502)	-11.6
Columbus, OH	3,788	764	25.3	4,133	1,323	47.1
Baltimore-Columbia-Towson, MD	3,693	(109)	-2.9	2,179	414	23.5
Virginia Beach-Norfolk-Newport News, VA-NC	3,692	380	11.5	1,431	292	25.6
Colorado Springs, CO	3,667	589	19.1	799	(253)	-24.0
Richmond, VA	3,666	174	5.0	1,756	(1,339)	-43.3
Detroit-Warren-Dearborn, MI	3,659	(483)	-11.7	850	(592)	-41.1
Columbia, SC	3,460	452	15.0	43	(89)	-67.4
Fayetteville-Springdale-Rogers, AR-MO	3,430	367	12.0	1,000	(1,093)	-52.2
Des Moines-West Des Moines, IA	3,391	438	14.8	1,042	343	49.1
Boston-Cambridge-Newton, MA-NH	3,356	98	3.0	6,207	(1,249)	-16.8
Huntsville, AL	3,187	30	624	24	(55)	-64.7
Source: U.S. Census Bureau Building Permit Data - Sept. 2020 year-to-date & Sept. 2019 year-to-date						

A GREAT RESOURCE FOR YOUR MARKET PLANNING

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

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

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

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

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

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

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

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volume of business it's doing. Employment figures, therefore, act as a gauge to business prospects and conditions in end-user markets.

- Employee counts can help you compare the relative sizes of various end-user groups in your area.
- You can also compare the makeup of one market area to another, and consider new customer markets or ones that you could be serving better.
- If you track the employment figures for each market over time, you'll see broad economic trends unfolding in your market.
- You can also use these employment figures to make your own multipliers or you can use the national multipliers we've already calculated.

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

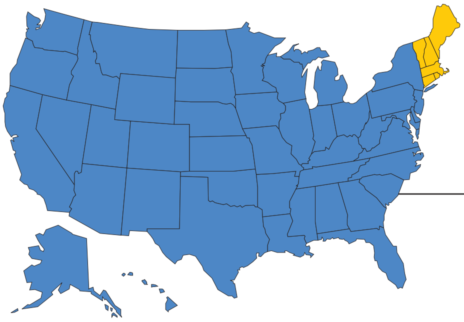
For instance, to find the number of electrical contractor employees in Addison, IL, a city not detailed in the East North Central regional profile, you could contact the local Chamber of Commerce, a nearby union chapter, the state university, or the local library to track it down.

These multipliers come in handy if you want to approximate the amount of sales available from a particular account. For example, if a local manufacturer employs 300 people, by applying the multiplier of $909, you would expect the facility to purchase about $272,700 worth of electrical MRO products this year.

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

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

Summary. With so much uncertainty in the economy because of concerns over COVID-19 and the potential timetable for vaccines, as well the potential for change in leadership in Washington at press-time, it will be a particularly tricky year to forecast. Your best bet is to check regularly on the local and national economic indicators that can alert you to any changes in market direction. You can count on *Electrical Wholesaling* magazine and *Electrical Marketing* newsletter to continue providing that data on a regular basis. ■



New England

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

With much of this region's construction industry shut down in the early days of the COVID-19 pandemic, we didn't find as much project activity as normal in this region. However, there's still some very impressive office, mixed-use and multi-family construction underway in the Boston-Cambridge-Newton, MA-NH Metropolitan Statistical Area (MSA), which accounts for 33% of the Core Electrical Potential (*EW's* combined electrical contractor and industrial sales estimates) in New England. Most of the projects either underway or on the drawing boards are in downtown Boston, including plans for the $1.3-billion Winthrop Tower; the $700-million Samuel & Associates' mixed-use and hotel project; and the 51-story office tower now being built above South Station. Another project of notes includes the Boston Red Sox' minor league baseball stadium being built in Worcester, MA.

2021 % OF U.S. SALES

5.8%

NEW ENGLAND

SALES POTENTIAL BY STATE ($ MILLIONS)

	Core Electrical Potential	% of Region	Total Industrial	Electrical Contractor
NEW ENGLAND	**5,541.7**		**2,573.0**	**2,968.7**
Connecticut	1,332.2	24.0%	513.2	819.0
Mane	517.4	9.3%	275.0	242.5
Massachusetts	2,496.6	45.1%	1,278.1	1,218.5
New Hampshire	582.8	10.5%	238.3	344.5
Rhode Island	367.5	6.6%	164.3	203.2
Vermont	245.1	4.4%	104.1	141.0

METROS WITH THE MOST SALES POTENTIAL

(in millions of dollars)

	State	Core Electrical Potential	Electrical Contractor	Total Industrial
Boston-Cambridge-Nashua	MA-NH	1,856.3	933.5	922.8
Providence-Warwick	RI-MA	486.6	227.2	259.4
Hartford-W. Hartford-E. Hartford	CT	477.6	168.9	308.7
Bridgeport-Stamford-Norwalk	CT	254.9	104.6	150.2
Springfield	MA-CT	234.1	90.1	144.0
Worcester	MA-CT	231.2	87.3	144.0
New Haven-Milford	CT	214.0	94.7	119.3
Portland-South Portland	ME	158.5	91.3	67.3

EMPLOYMENT STATISTICS

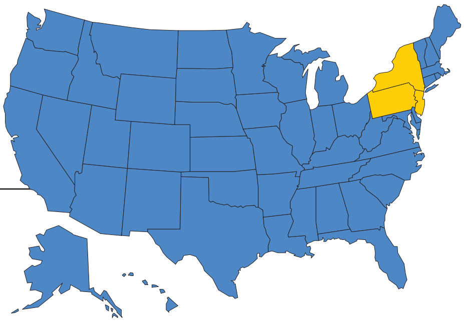
Area	Electrical Contractor Estimate	YOY # Change	YOY % Change	Industrial Employment	YOY # Change	YOY % Change
CONNECTICUT	**7,822**	**(325)**	**-4.2**	**468,800**	**(21,600)**	**-4.4**
Hartford-W. Hartford-E. Hartford, CT	2,574	(165)	-6.4	176,700	(6,300)	-3.4
Bridgeport-Stamford-Norwalk, CT	1,595	(186)	-11.7	86,000	(1,300)	-1.5
New Haven-Milford, CT	1,443	(87)	-6.0	68,300	(4,600)	-6.3
Norwich-New London, CT	542	22	4.0	51,900	(1,800)	-3.4
Waterbury, CT	386	(22)	-5.6	20,700	(1,900)	-8.4
MASSACHUSETTS	**19,478**	**(2,574)**	**-13.2**	**697,500**	**(38,800)**	**-5.3**
Boston-Cambridge-Nashua, MA	14,226	(2,301)	-16.2	528,200	(41,400)	-7.3
Springfield, MA	1,374	(264)	-19.2	82,400	(6,000)	-6.8
Worcester, MA	1,330	(191)	-14.3	82,400	(2,700)	-3.2
Lowell-Billerica-Chelmsford, MA	1,200	(147)	-12.3	66,600	(4,800)	-6.7
Framingham, MA	1,105	(147)	-13.3	63,500	(2,300)	-3.5
Barnstable Town, MA	862	(95)	-11.1	9,600	(1,200)	-11.1
Haverhill-Newburyport-Amesbury, MA	594	(117)	-19.7	25,800	(3,900)	-13.1
Brockton-Bridgewater-Easton,, MA	472	(286)	-60.6	15,400	(1,200)	-7.2
Taunton-Middleborough-Norton, MA	433	(43)	-10.0	16,300	(2,300)	-12.4
Lawrence-Methuen Town-Salem, MA	420	(69)	-16.5	24,100	(2,800)	-10.4
Peabody-Salem-Beverly, MA	373	(108)	-29.1	19,300	(2,100)	-9.8
New Bedford, MA	286	(61)	-21.2	21,100	(500)	-2.3
Leominster-Gardner, MA	256	(43)	-16.9	18,500	(1,600)	-8.0
Pittsfield, MA	243	(52)	-21.4	8,600	(1,000)	-10.4
Lynn-Saugus-Marblehead, MA	169	(52)	-30.8	12,000	(900)	-7.0
MAINE	**4,190**	**87**	**2.1**	**138,800**	**(23,500)**	**-14.5**
Portland-South Portland, ME	1,391	4	0.3	38,500	(5,600)	-12.7
Bangor, ME	446	(22)	-4.9	7,200	(1,100)	-13.3
Lewiston-Auburn, ME	403	9	2.2	14,300	(1,300)	-8.3
NEW HAMPSHIRE	**3,631**	**(152)**	**-4.2**	**197,200**	**(18,900)**	**-8.7**
Nashua, NH	776	(9)	-1.1	60,100	(6,600)	-9.9
Manchester, NH	715	(22)	-3.0	22,200	(1,800)	-7.5
Portsmouth, NH	360	-	0.0	23,700	(2,500)	-9.5
Dover-Durham, NH	243	(4)	-1.8	14,800	(1,900)	-11.4
RHODE ISLAND	**2,505**	**(217)**	**-8.7**	**116,300**	**(3,000)**	**-2.5**
Providence-Warwick, RI-MA	3,462	9	0.3	148,500	(2,200)	-1.5
VERMONT	**1,586**	**(559)**	**-35.2**	**80,700**	**(10,600)**	**-11.6**
Burlington-South Burlington, VT	646	(178)	-27.5	34,700	(4,200)	-10.8

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

All employment data for Construction and Manufacturing is in thousands and represents the percent change in three-month moving averages from June 2019–Aug. 2019 and June 2020-Aug. 2020. Source: Current Employment Statistics from the Bureau of Labor Statistics.

Electrical contractor employment is an *EW* estimate based on internal data and data from the U.S. Bureau of Labor Statistics. Core Electrical Potential is the combined total of electrical contractor and industrial sales potential, which typically account for at least 75% of a full-line electrical distributor's sales.

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	**19,751**	**(1,638)**	**-8.3**	**725,900**	**(33,100)**	**-4.4**
Newark, NJ	5,568	(702)	-12.6	222,900	(9,300)	-4.0
Middlesex-Monmouth-Ocean, NJ	5,317	(247)	-4.6	133,400	(5,800)	-4.2
Bergen-Hudson-Passaic Counties, NJ	3,272	(888)	-27.2	168,400	(13,300)	-7.3
Camden, NJ	2,986	(147)	-4.9	119,100	(200)	-0.2
Trenton, NJ	685	(39)	-5.7	32,200	(700)	-2.1
Atlantic City, NJ	576	(169)	-29.3	7,500	300	4.2
Vineland-Bridgeton, NJ	364	(17)	-4.8	25,300	(1,200)	-4.5
NEW YORK	**48,317**	**(6,461)**	**-13.4**	**1,189,200**	**(137,300)**	**-10.4**
NY-Newark-Jersey City, NY-NJ-PA	48,399	(7,228)	-14.9	979,800	(105,600)	-9.7
Nassau County-Suffolk County, NY	10,352	(893)	-8.6	189,100	(25,000)	-11.7
Rochester, NY	2,942	(126)	-4.3	148,400	(23,100)	-13.5
Buffalo-Cheektowaga-Niagara Falls, NY	2,838	(169)	-6.0	159,900	1,200	0.8
Albany-Schenectady-Troy, NY	2,743	(61)	-2.2	70,800	(8,800)	-11.1
Syracuse, NY	1,681	(199)	-11.9	71,500	(7,300)	-9.3
Dutchess County-Putnam County, NY	1,300	130	10.0	24,900	(2,500)	-9.1
Binghamton, NY	468	(134)	-28.7	32,000	(1,700)	-5.0
Utica-Rome, NY	399	(91)	-22.8	31,800	(2,000)	-5.9
Kingston, NY	399	(30)	-7.6	9,300	(1,100)	-10.6
Glens Falls, NY	303	(43)	-14.3	16,800	(1,300)	-7.2
Watertown-Fort Drum, NY	195	(52)	-26.7	5,400	(900)	-14.3
Elmira, NY	186	(30)	-16.3	14,900	(600)	-3.9
Ithaca, NY	156	(26)	-16.7	9,600	1,000	11.6
PENNSYLVANIA	**33,297**	**(2,227)**	**-6.7**	**1,621,200**	**(113,800)**	**-6.6**
Phila.-Camden-Wilmington, PA-NJ-DE-MD	13,966	(2,123)	-15.2	529,100	(25,800)	-4.6
Pittsburgh, PA	8,069	(598)	-7.4	247,500	(15,800)	-6.0
Lebanon, PA	5,785	(1,625)	-28.1	27,500	(700)	-2.5
Philadelphia, PA	3,133	(130)	-4.1	96,800	(5,300)	-5.2
Lancaster, PA	2,453	9	0.4	107,900	(4,300)	-3.8
Harrisburg-Carlisle, PA	1,712	52	3.0	61,900	(4,500)	-6.8
Allentown-Bethlehem-Easton, PA	1,517	(334)	-22.0	114,100	(6,000)	-5.0
York-Hanover, PA	1,400	(199)	-14.2	96,000	(600)	-0.6
Scranton-Wilkes-Barre-Hazleton, PA	1,244	(156)	-12.5	80,800	(5,300)	-6.2
Reading, PA	1,023	(48)	-4.7	97,400	600	0.6
Erie, PA	477	(104)	-21.8	55,500	(4,400)	-7.3
Altoona, PA	286	(130)	-45.5	20,200	(1,600)	-7.3
Chambersburg-Waynesboro, PA	260	(65)	-25.0	26,800	(1,300)	-4.6
Johnstown, PA	247	(121)	-49.1	12,300	(700)	-5.4
Gettysburg, PA	195	(39)	-20.0	22,100	(900)	-3.9
East Stroudsburg, PA	186	(74)	-39.5	14,100	(900)	-6.0
Bloomsburg-Berwick, PA	117	(52)	-44.4	14,700	(1,200)	-7.5

Many of the region's largest construction projects have been underway for some time or were recently completed, and not as many new projects broke ground in this region over the past few months. Philadelphia's $1.5-billion Pavilion hospital addition on the University of Pennsylvania campus opened 120 hospital rooms early to provide more space in the existing facility for COVID-19 patients. The Philly metro also saw several big projects break ground in 3Q 2020 — the $327-million Riddle Hospital renovation in Media, PA; and the $330-million East Market mixed-use project and $200-million 2222 Market Street office building in downtown Philadelphia. Two hours north up I-95, Jersey City remains a popular site for new condos for residents looking for killer views of the Big Apple across the Hudson River. In New York, the LaGuardia Airport makeover is well underway and the renovation of JFK Airport is in the early days. Newark Airport has a renovation underway of its Terminal 1. Brooklyn is still seeing lots of condo construction.

2021 % OF U.S. SALES

12.3%

MIDDLE ATLANTIC

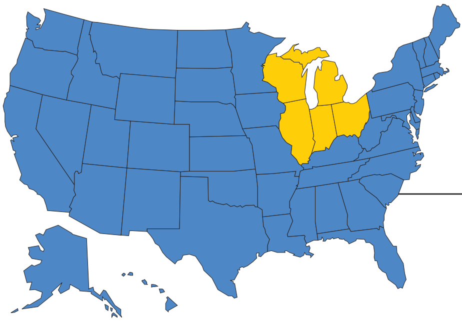
SALES POTENTIAL BY STATE ($ MILLIONS)

	Core Electrical Potential	% of Region	Total Industrial	Electrical Contractor
MIDDLE ATLANTIC	**12,829.21**		**12,853.7**	**9,539.1**
New Jersey	2,564.17	20.0%	1,296.0	1,268.1
New York	5,247.93	40.9%	3,170.4	2,077.5
Pennsylvania	5,017.11	39.1%	2,184.9	2,832.2

METROS WITH THE MOST SALES POTENTIAL

(in millions of dollars)

	State	Core Electrical Potential	Electrical Contractor	Total Industrial
NY-Newark-Jersey City	NY-NJ-PA	4,887.5	3,175.8	1,711.7
Phila.-Camden-Wilmington	PA-NJ-DE-MD	1,840.8	916.4	924.3
Nassau County-Suffolk County	NY	1,009.6	679.3	330.4
Pittsburgh	PA	961.8	529.4	432.4
Newark	NJ	754.8	365.4	389.4
Middlesex-Monmouth-Ocean	NJ	581.9	348.9	233.0
Bergen-Hudson-Passaic Counties	NJ	508.9	214.7	294.2
Buffalo-Cheektowaga-Niagara Falls	NY	465.6	186.2	279.3



East North Central

Illinois • Indiana • Michigan • Ohio • Wisconsin

In many years, much of the construction news in this region covers plans for new high rise condo towers or office buildings along Chicago's lake front, but several big-name projects have recently been put on hold, and now there's a more diverse mix of projects to talk about throughout the region. Ohio State fans are looking forward to the upcoming construction of the $1.79-billion Wexner Medical Center Inpatient Hospital. It will be the largest new construction project ever built on the university's campus in Columbus, OH. Other large projects now underway include two massive natural gas-fired power plants — the $1-billion, 1,085-MW Indeck Niles Energy Center power plant in Niles, MI and the $1.6-billion Guernsey Power Station in Pleasant City OH; a $150-million solar project in Petersburg, IN; and the $600-million Jordan Creek Wind Farm in Williamsport, IN. On the drawing boards are a $800-million Facebook data center in Dekalb, IL, and a $221-million upgrade to the University of Cincinnati hospital.

2021 % OF U.S. SALES

20.9%

EAST NORTH CENTRAL

SALES POTENTIAL BY STATE ($ MILLIONS)

	Core Electrical Potential	% of Region	Total Industrial	Electrical Contractor
EAST NORTH CENTRAL	**22,255.6**		**7,874.8**	**14,380.8**
Illinois	4,878.6	21.9%	1,953.4	2,925.2
Indiana	3,933.1	17.7%	1,307.4	2,625.7
Michigan	4,496.1	20.2%	1,555.1	2,941.1
Ohio	5,396.8	24.2%	1,929.0	3,467.8
Wisconsin	3,551.0	16.0%	1,130.0	2,421.0

METROS WITH THE MOST SALES POTENTIAL

(in millions of dollars)

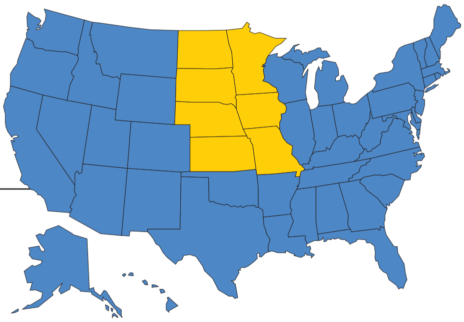
	State	Core Electrical Potential	Electrical Contractor	Total Industrial
Chicago-Naperville-Elgin	IL-IN-WI	3,643.1	1,540.6	2,102.5
Detroit-Warren-Dearborn	MI	1,841.0	638.1	1,203.0
Cincinnati	OH-KY-IN	1,006.6	413.1	593.5
Cleveland-Elyria	OH	963.7	357.1	606.6
Indianapolis-Carmel-Anderson	IN	958.9	509.3	449.7
Milwaukee-Waukesha-W. Allis	WI	888.4	313.6	574.8
Grand Rapids-Wyoming	MI	790.9	247.4	543.5
Columbus	OH	734.6	365.9	368.6

EMPLOYMENT STATISTICS

Area	Electrical Contractor Estimate	YOY # Change	YOY % Change	Industrial Employment	YOY # Change	YOY % Change
ILLINOIS	**29,770**	**(1,764)**	**-5.9**	**1,674,400**	**(90,400)**	**-5.1**
Chicago-Naperville-Elgin, IL-IN-WI	23,478	(1,291)	-5.5	1,203,500	(62,700)	-5.0
Lake County-Kenosha County, IL	2,141	(17)	-0.8	182,400	(6,600)	-3.5
Elgin, IL	1,876	(91)	-4.8	100,000	(11,600)	-10.4
Peoria, IL	1,014	(69)	-6.8	66,200	(3,800)	-5.4
Rockford, IL	741	(30)	-4.1	83,800	(10,200)	-10.9
Champaign-Urbana, IL	542	4	0.8	21,300	(1,800)	-7.8
Springfield, IL	394	(117)	-29.7	7,900	(2,000)	-20.2
Bloomington, IL	386	(17)	-4.5	10,500	(900)	-7.9
Decatur, IL	347	(65)	-18.8	31,500	(2,200)	-6.5
Kankakee, IL	182	(13)	-7.1	21,700	(800)	-3.6
Danville, IL	78	(13)	-16.7	14,300	(1,000)	-6.5
INDIANA	**19,925**	**243**	**1.2**	**1,503,000**	**(123,500)**	**-7.6**
Indianapolis-Carmel-Anderson, IN	7,761	524	6.8	257,400	(28,100)	-9.8
Gary, IN	2,184	(160)	-7.3	102,200	(5,600)	-5.2
Fort Wayne, IN	1,638	65	4.0	109,700	(5,100)	-4.4
Evansville, IN	1,239	(82)	-6.6	67,200	(3,600)	-5.1
South Bend-Mishawaka, IN	702	(108)	-15.4	43,900	(8,300)	-15.9
Elkhart-Goshen, IN	589	9	1.5	170,700	(23,900)	-12.3
Lafayette-West Lafayette, IN	498	(17)	-3.5	53,700	(5,800)	-9.7
Terre Haute, IN	464	(43)	-9.3	25,800	(4,100)	-13.7
Bloomington, IN	390	(13)	-3.3	28,100	(1,100)	-3.8
Michigan City-La Porte, IN	273	-	0.0	23,200	(1,200)	-4.9
Muncie, IN	234	(13)	-5.6	11,100	(1,000)	-8.3
Columbus, IN	234	(4)	-1.9	57,600	(3,700)	-6.0
Kokomo, IN	169	(4)	-2.6	35,900	2,100	6.2
MICHIGAN	**23,699**	**(286)**	**-1.2**	**1,683,500**	**(207,500)**	**-11.0**
Detroit-Warren-Dearborn, MI	9,724	(750)	-7.7	688,600	(82,000)	-10.6
Warren-Troy-Farmington Hills, MI	6,959	(451)	-6.5	423,400	(63,400)	-13.0
Grand Rapids-Wyoming, MI	3,770	238	6.3	311,100	(49,500)	-13.7
Detroit-Dearborn-Livonia, MI	2,765	(299)	-10.8	265,200	(18,600)	-6.6
Lansing-East Lansing, MI	1,001	(134)	-13.4	48,500	(9,700)	-16.7
Kalamazoo-Portage, MI	871	-	0.0	61,500	(8,900)	-12.6
Flint, MI	737	(82)	-11.2	32,900	(9,800)	-23.0
Ann Arbor, MI	589	(74)	-12.5	41,300	(3,000)	-6.8
Saginaw, MI	390	(52)	-13.3	31,600	(6,000)	-16.0
Niles-Benton Harbor, MI	377	61	16.1	38,800	(1,000)	-2.5
Muskegon, MI	360	30	8.4	34,400	(7,600)	-18.1
Jackson, MI	290	9	3.0	25,300	(4,400)	-14.8
Monroe, MI	234	(17)	-7.4	14,500	(2,600)	-15.2
Battle Creek, MI	212	(30)	-14.3	29,100	(5,600)	-16.1
Bay City, MI	182	(13)	-7.1	9,300	(4,500)	-32.6

(Continued on page 33)

West North Central



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

EMPLOYMENT STATISTICS

Area	Electrical Contractor Estimate	YOY # Change	YOY % Change	Industrial Employment	YOY # Change	YOY % Change
IOWA	**9,841**	**(1,200)**	**-12.2**	**658,500**	**(25,900)**	**-3.8**
Des Moines-West Des Moines, IA	2,474	(364)	-14.7	61,100	(2,900)	-4.5
Davenport-Moline-Rock Island, IA	1,348	(39)	-2.9	67,300	(4,300)	-6.0
Cedar Rapids, IA	979	(143)	-14.6	63,100	1,000	1.6
KANSAS	**8,563**	**(17)**	**-0.2**	**470,500**	**(33,900)**	**-6.7**
Wichita, KS	2,110	(108)	-5.1	148,700	(18,200)	-10.9
Topeka, KS	633	(117)	-18.5	24,600	300	1.2
MINNESOTA	**17,312**	**(1,131)**	**-6.5**	**928,900**	**(55,900)**	**-5.7**
Minneapolis-St. Paul, MN-WN	10,998	(1,343)	-12.2	571,600	(38,700)	-6.3
Duluth, MN	1,161	(169)	-14.6	23,100	(1,900)	-7.6
St. Cloud, MN	1,062	22	2.0	43,200	(3,900)	-8.3
Rochester, MN	737	9	1.2	34,200	200	0.6
MISSOURI	**17,424**	**347**	**2.0**	**800,600**	**(33,200)**	**-4.0**
St. Louis, MO	8,758	(485)	-5.5	346,100	(15,900)	-4.4
Kansas City, MO	7,583	425	5.6	222,800	(6,700)	-2.9
Springfield, MO	1,404	147	10.5	51,300	-	0.0
NORTH DAKOTA	**3,896**	**(234)**	**-6.0**	**74,400**	**(5,500)**	**-6.9**
Fargo, ND-MN	1,270	(30)	-2.4	28,600	(2,200)	-7.1
Bismarck, ND	663	(30)	-4.6	5,100	(300)	-5.6
Grand Forks, ND-MN	416	(17)	-4.2	14,700	1,100	8.1
NEBRASKA	**7,475**	**(22)**	**-0.3**	**292,200**	**(7,500)**	**-2.5**
Omaha-Council Bluffs, NE-IA	4,212	74	1.7	97,700	(3,700)	-3.6
Lincoln, NE	1,278	(9)	-0.7	40,800	100	0.2
SOUTH DAKOTA	**3,878**	**364**	**9.4**	**127,500**	**(8,500)**	**-6.3**
Sioux Falls, SD	1,304	(17)	-1.3	42,100	(1,400)	-3.2
Rapid City, SD	745	48	6.4	8,600	(100)	-1.1

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All employment data for Construction and Manufacturing is in thousands and represents the percent change in three-month moving averages from June 2019–Aug. 2019 and June 2020-Aug. 2020. Source: Current Employment Statistics from the Bureau of Labor Statistics.

Electrical contractor employment is an *EW* estimate based on internal data and data from the U.S. Bureau of Labor Statistics. Core Electrical Potential is the combined total of electrical contractor and industrial sales potential, which typically account for at least 75% of a full-line electrical distributor's sales.

While the $5.6-billion Mayo Clinic Destination Medical Center in Rochester, MN, is the largest construction project currently underway in this region, all sorts of data center projects are either underway or on the drawing boards. The biggest of them all is Diode Ventures' $6-billion plan for 13 data centers in a campus setting near Kansas City, MO. Google has plans for a $600-million data center in Kansas City, MO, and has another $600-million facility underway in Sarpy County, NE, south of Omaha. That county is a hotbed for data centers and according to a report at *www.starherald.com,* the Google facility will be the county's eighth data center. Facebook has a $400-million data center underway in Altona, IA, and Microsoft plans to build two data centers in West Des Moines, IA, according to *www.kcci.com.*

2021 % OF U.S. SALES
6.2%
WEST NORTH CENTRAL

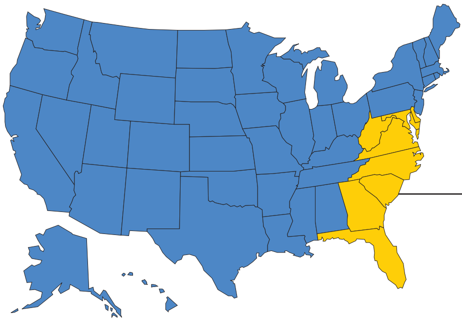
SALES POTENTIAL BY STATE ($ MILLIONS)

	Core Electrical Potential	% of Region	Total Industrial	Electrical Contractor
WEST NORTH CENTRAL	**10,344.5**		**4,487.5**	**5,857.0**
Iowa	1,796.1	17.4%	645.7	1,150.4
Kansas	1,383.8	13.4%	561.9	822.0
Minnesota	2,758.7	26.7%	1,135.9	1,622.8
Missouri	2,542.0	24.6%	1,143.3	1,398.6
Nebraska	1,001.0	9.7%	490.5	510.5
North Dakota	385.6	3.7%	255.6	130.0
South Dakota	477.2	4.6%	254.5	222.7

METROS WITH THE MOST SALES POTENTIAL

(in millions of dollars)

	State	Core Electrical Potential	Electrical Contractor	Total Industrial
Minneapolis-St. Paul	MN-WI	1,720.2	721.7	998.6
St. Louis	MO-IL	1,179.3	574.7	604.6
Kansas City	MO-KS	886.8	497.6	389.2
Omaha-Council Bluffs	NE-IA	447.1	276.4	170.7
Wichita	KS	398.3	138.5	259.8
Des Moines-West Des Moines	IA	269.1	162.4	106.7
Davenport-Moline-Rock Island	IA-IL	206.0	88.4	117.6
Springfield	MO	181.7	92.1	89.6



South Atlantic

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

If you ever need proof that the U.S. population is shifting toward the Sunbelt, look no further than the residential and commercial construction data for this region. On the residential front, MSAs including the Villages, Cape Coral-Fort Myers, and Punta Gorda in Florida and Myrtle Beach-Conway-North Myrtle Beach, along the South Carolina-North Carolina are some of the hottest housing markets in the country, and when measured on a total permits/1,000 residents basis are building homes at well over twice that national average. When it comes to commercial construction, look again to Florida. Charlotte and Raleigh in North Carolina and Atlanta also have hundreds of millions of dollars in big projects planned or underway.

2021 % OF U.S. SALES
13.8%
SOUTH ATLANTIC

SALES POTENTIAL BY STATE ($ MILLIONS)

	Core Electrical Potential	% of Region	Total Industrial	Electrical Contractor
SOUTH ATLANTIC	**23,040.9**		**13,284.4**	**9,756.5**
Delaware	315.9	1.4%	186.0	130.0
District of Columbia	135.9	0.6%	129.7	6.3
Florida	6,808.8	29.6%	4,851.1	1,957.7
Georgia	3,721.4	16.2%	1,711.2	2,010.3
Maryland	2,035.7	8.8%	1,480.0	555.7
North Carolina	4,210.2	18.3%	1,903.9	2,306.2
South Carolina	2,263.5	9.8%	924.1	1,339.4
Virginia	3,013.7	13.1%	1,806.1	1,207.5
West Virginia	535.7	2.3%	292.3	243.4

METROS WITH THE MOST SALES POTENTIAL

(in millions of dollars)

	State	Core Electrical Potential	Electrical Contractor	Total Industrial
Atlanta-Sandy Springs-Roswell	GA	1,926.3	1,087.0	839.3
Wash.-Arlington-Alexandria	DC-VA-MD-WV	1,696.2	1,411.5	284.8
Miami-Fort Lauderdale-West Palm Beach	FL	1,642.1	1,195.9	446.2
Charlotte-Concord-Gastonia	NC-SC	1,125.6	579.5	546.1
Tampa-St. Petersburg-Clearwater	FL	1,070.9	709.1	361.8
Baltimore-Columbia-Towson	MD	1,043.4	744.1	299.3
Orlando-Kissimmee-Sanford	FL	987.4	729.9	257.5
Virginia Beach-Norfolk-Newport News	VA-NC	639.2	339.2	300.0

EMPLOYMENT STATISTICS

Area	Electrical Contractor Estimate	YOY # Change	YOY % Change	Industrial Employment	YOY # Change	YOY % Change
DISTRICT OF COLUMBIA	**1,976**	**9**	**0.4**	**3,600**	**(400)**	**-10.0**
Wash.-Arlington-Alexandria, DC-VA-MD-WV	17,121	(126)	-0.7	106,900	(7,700)	-6.7
DELAWARE	**2,834**	**(199)**	**-7.0**	**74,400**	**(7,500)**	**-9.2**
Wilmington, DE-MD-NJ	2,063	(221)	-10.7	52,000	(4,200)	-7.5
Salisbury, MD-DE	1,183	(74)	-6.2	39,600	(4,000)	-9.2
Dover, DE	360	(4)	-1.2	14,100	(600)	-4.1
FLORIDA	**73,931**	**273**	**0.4**	**1,120,600**	**(34,200)**	**-3.0**
Miami-Fort Lauderdale-W. Palm Beach, FL	18,226	(316)	-1.7	255,400	(19,800)	-7.2
Orlando-Kissimmee-Sanford, FL	11,124	(113)	-1.0	147,400	(1,200)	-0.8
Tampa-St. Petersburg-Clearwater, FL	10,807	286	2.6	207,100	(500)	-0.2
Jacksonville, FL	5,976	(69)	-1.2	96,200	(1,400)	-1.4
W. Palm Beach-Boca Raton-Delray Beach, FL	5,022	(61)	-1.2	58,500	(2,000)	-3.3
Cape Coral-Fort Myers, FL	4,312	61	1.4	18,600	(900)	-4.6
North Port-Sarasota-Bradenton, FL	3,371	(61)	-1.8	49,500	(1,800)	-3.5
Naples-Immokalee-Marco Island, FL	2,405	117	4.9	14,800	800	5.7
Palm Bay-Melbourne-Titusville, FL	2,158	165	7.6	83,800	1,200	1.5
Lakeland-Winter Haven, FL	2,006	143	7.1	52,400	(1,600)	-3.0
Deltona-Daytona Beach-Ormond Beach, FL	1,889	43	2.3	29,900	(4,200)	-12.3
Port St. Lucie, FL	1,707	143	8.4	23,400	800	3.5
Pensacola-Ferry Pass-Brent, FL	1,621	17	1.1	20,500	(800)	-3.8
Tallahassee, FL	1,213	26	2.1	9,100	(900)	-9.0
Ocala, FL	1,179	69	5.9	27,100	(600)	-2.2
Panama City, FL	1,005	108	10.8	8,000	(1,000)	-11.1
Crestview-Fort Walton Beach-Destin, FL	923	35	3.8	8,100	(300)	-3.6
Gainesville, FL	828	22	2.6	14,100	(300)	-2.1
Sebastian-Vero Beach, FL	572	(13)	-2.3	6,600	(300)	-4.3
Punta Gorda, FL	559	(4)	-0.8	2,400	-	0.0

(Continued on page 33)

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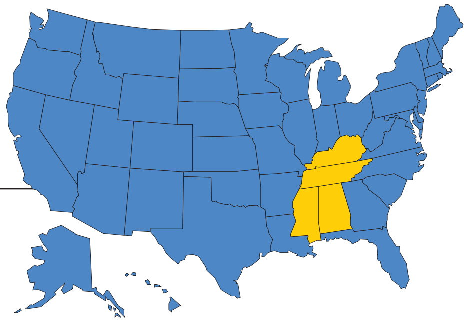
East South Central

Alabama • Kentucky • Mississippi • Tennessee



EMPLOYMENT STATISTICS

Area	Electrical Contractor Estimate	YOY # Change	YOY % Change	Industrial Employment	YOY # Change	YOY % Change
ALABAMA	**12,354**	**113**	**0.9**	**784,200**	**(22,200)**	**-2.8**
Birmingham-Hoover, AL	3,896	(13)	-0.3	111,300	(7,100)	-6.0
Mobile, AL	1,504	9	0.6	51,800	(4,800)	-8.5
Huntsville, AL	1,296	104	8.0	73,100	(4,600)	-5.9
Tuscaloosa, AL	880	(22)	-2.5	47,000	(4,100)	-8.0
Montgomery, AL	810	(82)	-10.2	51,800	(2,800)	-5.1
Decatur, AL	581	30	5.2	37,800	(1,600)	-4.1
Florence-Muscle Shoals, AL	498	17	3.5	27,300	200	0.7
Auburn-Opelika, AL	368	13	3.5	19,400	600	3.2
Dothan, AL	355	4	1.2	15,300	(900)	-5.6
Anniston-Oxford-Jacksonville, AL	156	-	0.0	17,900	(2,000)	-10.1
Gadsden, AL	130	(4)	-3.3	15,000	(900)	-5.7
KENTUCKY	**10,738**	**(91)**	**-0.8**	**710,100**	**(47,800)**	**-6.3**
Louisville/Jefferson County, KY-IN	3,744	(251)	-6.7	236,300	(14,200)	-5.7
Lexington-Fayette, KY	1,759	(108)	-6.2	85,800	(4,500)	-5.0
Bowling Green, KY	438	(26)	-5.9	33,400	(5,400)	-13.9
Owensboro, KY	355	(13)	-3.7	24,800	(1,800)	-6.8
Elizabethtown-Fort Knox, KY	260	(9)	-3.3	22,200	(2,100)	-8.6
MISSISSIPPI	**5,395**	**(477)**	**-8.8**	**428,400**	**(11,300)**	**-2.6**
Jackson, MS	1,218	(134)	-11.0	60,500	(1,500)	-2.4
Gulfport-Biloxi-Pascagoula, MS	971	(61)	-6.3	53,600	2,300	4.5
TENNESSEE	**17,177**	**(667)**	**-3.9**	**968,000**	**(102,500)**	**-9.6**
Nashville-Davidson-Franklin, TN	6,361	(139)	-2.2	212,700	(43,400)	-16.9
Memphis, TN-MS-AR	3,077	(108)	-3.5	118,900	(17,600)	-12.9
Chattanooga, TN-GA	1,421	(74)	-5.2	99,600	(3,300)	-3.2
Knoxville, TN	2,518	30	1.2	116,400	(7,000)	-5.7
Kingsport-Bristol-Bristol, TN-VA	797	-	0.0	56,500	(7,700)	-12.0
Clarksville, TN-KY	429	(9)	-2.0	38,700	1,200	3.2
Jackson, TN	390	(30)	-7.8	32,200	(1,300)	-3.9
Johnson City, TN	312	(17)	-5.6	23,900	(400)	-1.6
Morristown, TN	260	4	1.7	36,800	(300)	-0.8
Cleveland, TN	247	(13)	-5.3	25,500	(1,800)	-6.6

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The surge in data center construction touches this region, too, and Facebook has plans for a $800-million facility in Gallatin, TN, in the Nashville, TN. Rosendin Electric, a California-based electrical contractor with an expertise in data center construction, has opened an office in Gallatin as a base of operations for its work on this project. The Nashville metro usually ranks near the top of any list of the hottest housing markets in the United States, but this year it's joined by three MSAs in Alabama. Huntsville, AL, has seen a +19% increase in single-family permits through Aug. 20 to 2,722 permits. When measured by total building permits per 1,000 residents, the Auburn-Opelika, AL, MSA (11.5), home to Auburn University, and Daphne-Fairhope-Foley, AL (9.88) near Mobile, AL, on the Gulf Coast, double up the U.S. national average. In the planning stages for this region are a $200-million Amazon fulfillment center and a $215-million office building in Mount Juliet, TN.

2021 % OF U.S. SALES

4.6%

EAST SOUTH CENTRAL

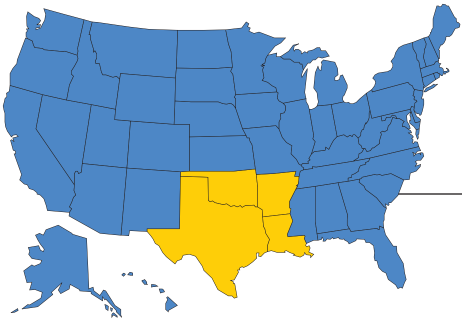
SALES POTENTIAL BY STATE ($ MILLIONS)

	Core Electrical Potential	% of Region	Total Industrial	Electrical Contractor
EAST SOUTH CENTRAL	**8,046.4**		**2,996.4**	**5,050.1**
Alabama	2,180.7	27.1%	810.7	1,370.0
Kentucky	1,945.1	24.2%	704.6	1,240.5
Mississippi	1,102.4	13.7%	354.0	748.4
Tennessee	2,818.2	35.0%	1,127.1	1,691.1

METROS WITH THE MOST SALES POTENTIAL

(in millions of dollars)

	State	Core Electrical Potential	Electrical Contractor	Total Industrial
Nashville-Davidson-Franklin	TN	789.0	417.4	371.6
Louisville/Jefferson County	KY-IN	658.5	245.7	412.8
Birmingham-Hoover	AL	450.1	255.6	194.4
Memphis	TN-MS-AR	409.6	201.9	207.7
Knoxville	TN	368.6	165.2	203.4
Chattanooga	TN-GA	267.3	93.3	174.0
Lexington-Fayette	KY	265.3	115.4	149.9
Huntsville	AL	212.7	85.0	127.7



West South Central

Arkansas • Louisiana • Oklahoma • Texas

It's impossible to overlook the mammoth share of total electrical sales potential Texas has in this market. According to *EW* data, the state accounts for more than 70% of the region's Core Electrical Potential. And despite any slowdown from the coronavirus or the drastic decline in oil drilling in its Permian and Eagle Ford Basins, Texas is still logging dozens of construction projects valued at more than $100 million. A May 2020 report in the *Austin Business Journal* said the Austin area had 37 major office projects underway. Tesla also has a $1 billion Gigafactory underway in the Austin metropolitan area. While Houston has plans for the $546 million Texas A&M Medical Center, Dallas is the king of commercial construction in the state, with American Airlines, Google, Keurig/Dr. Pepper and many other large corporations building new facilities in the Dallas-Fort Worth metro. Outside of Texas, the $100 million WPX Energy headquarters being built in Tulsa, OK, and several large petrochemical plants in Louisiana are among the region's larger projects.

2021 % OF U.S. SALES

12.4%

WEST SOUTH CENTRAL

SALES POTENTIAL BY STATE ($ MILLIONS)

	Core Electrical Potential	% of Region	Total Industrial	Electrical Contractor
WEST SOUTH CENTRAL	**15,198.5**		**8,518.8**	**6,679.7**
Arkansas	1,216.4	8.0%	460.3	756.1
Louisiana	1,727.7	11.4%	1,052.3	675.4
Oklahoma	1,325.1	8.7%	655.1	670.0
Texas	10,929.2	71.9%	6,351.0	4,578.2

METROS WITH THE MOST SALES POTENTIAL

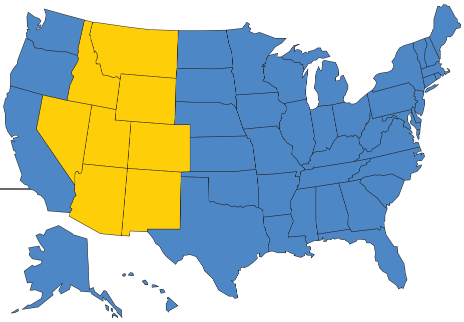
(in millions of dollars)

	State	Core Electrical Potential	Electrical Contractor	Total Industrial
Dallas-Fort Worth-Arlington	TX	3,421.1	1,955.7	1,465.4
Houston-Woodlands-Sugar Land	TX	2,991.7	1,856.5	1,135.2
Austin-Round Rock	TX	964.5	618.7	345.7
San Antonio-New Braunfels	TX	751.5	489.1	262.4
Baton Rouge	LA	517.6	366.8	150.8
Tulsa	OK	464.8	207.3	257.5
Oklahoma City	OK	439.3	275.8	163.5
New Orleans-Metairie	LA	347.4	200.5	146.9

EMPLOYMENT STATISTICS

Area	Electrical Contractor Estimate	YOY # Change	YOY % Change	Industrial Employment	YOY # Change	YOY % Change
ARKANSAS	**7,016**	**78**	**1.1**	**432,800**	**(53,800)**	**-11.1**
Little Rock-North Little Rock-Conway, AR	2,396	48	2.0	56,600	(7,000)	-11.0
Fayetteville-Springdale-Rogers, AR	1,634	(4)	-0.3	86,200	(4,100)	-4.5
Fort Smith, AR	758	(56)	-7.4	48,900	(3,200)	-6.1
LOUISIANA	**16,038**	**(2,128)**	**-13.3**	**386,600**	**(27,100)**	**-6.6**
Baton Rouge, LA	5,590	(563)	-10.1	86,300	(3,500)	-3.9
New Orleans-Metairie, LA	3,055	(711)	-23.3	84,100	(5,800)	-6.5
Lake Charles, LA	2,418	(624)	-25.8	26,700	(5,700)	-17.6
Lafayette, LA	1,092	(117)	-10.7	43,400	(5,800)	-11.8
Shreveport-Bossier City, LA	893	(143)	-16.0	33,500	100	0.3
Houma-Thibodaux, LA	568	(78)	-13.7			
OKLAHOMA	**9,984**	**(962)**	**-9.6**	**383,500**	**(40,200)**	**-9.5**
Oklahoma City, OK	4,203	(26)	-0.6	93,600	(9,000)	-8.8
Tulsa, OK	3,159	(204)	-6.4	147,400	(20,000)	-11.9
Lawton, OK	212	(4)	-2.0	10,200	(600)	-5.6
TEXAS	**96,789**	**(4,632)**	**-4.8**	**2,620,600**	**(114,400)**	**-4.2**
Dallas-Fort Worth-Arlington, TX	29,805	(52)	-0.2	838,800	(34,100)	-3.9
Houston-Woodlands-Sugar Land, TX	28,292	(2,505)	-8.9	649,800	(63,100)	-8.9
Austin-Round Rock, TX	9,429	390	4.1	197,900	8,700	4.6
San Antonio-New Braunfels, TX	7,453	61	0.8	150,200	(4,100)	-2.7
Midland, TX	3,839	(1,447)	-37.7	11,700	(900)	-7.1
Corpus Christi, TX	2,522	(611)	-24.2	24,600	(700)	-2.8
Odessa, TX	2,396	(524)	-21.9	14,200	(1,500)	-9.6
Beaumont-Port Arthur, TX	2,275	(325)	-14.3	61,900	(5,400)	-8.0
El Paso, TX	2,171	(61)	-2.8	48,300	(2,700)	-5.3
Longview, TX	1,629	(420)	-25.8	24,300	(5,600)	-18.7
Lubbock, TX	1,244	74	5.9	13,500	(1,000)	-6.9
Waco, TX	1,083	61	5.6	47,200	(1,500)	-3.1
College Station-Bryan, TX	1,053	43	4.1	18,900	-	0.0
Amarillo, TX	962	17	1.8	39,600	(1,700)	-4.1
McAllen-Edinburg-Mission, TX	897	(230)	-25.6	14,600	(5,700)	-28.1
Killeen-Temple, TX	897	(13)	-1.4	22,500	(800)	-3.4
Tyler, TX	819	(74)	-9.0	15,100	(100)	-0.7
Abilene, TX	745	39	5.2	9,200	(500)	-5.2
Victoria, TX	507	(91)	-17.9	5,700	(700)	-10.9
Laredo, TX	477	(26)	-5.5	2,100	-	0.0
San Angelo, TX	438	(108)	-24.8	8,800	(1,100)	-11.1
Brownsville-Harlingen, TX	399	(9)	-2.2	17,000	(1,200)	-6.6
Sherman-Denison, TX	368	(9)	-2.4	15,900	(1,100)	-6.5
Wichita Falls, TX	325	(78)	-24.0	14,400	(1,300)	-8.3
Texarkana, TX-AR	364	(13)	-3.6	15,700	(1,000)	-6.0

Mountain



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

EMPLOYMENT STATISTICS

Area	Electrical Contractor Estimate	YOY # Change	YOY % Change	Industrial Employment	YOY # Change	YOY % Change
ARIZONA	**21,966**	**(490)**	**-2.2**	**514,700**	**(20,700)**	**-3.9**
Phoenix-Mesa-Scottsdale, AZ	17,229	(442)	-2.6	390,800	(11,200)	-2.8
Tucson, AZ	2,383	43	1.8	80,600	(4,100)	-4.8
Prescott, AZ	854	30	3.6	11,200	(300)	-2.6
Lake Havasu City-Kingman, AZ	459	9	1.9	9,000	(600)	-6.3
Yuma, AZ	303	(95)	-31.4	7,800	700	9.9
Flagstaff, AZ	295	(56)	-19.1	11,100	(300)	-2.6
Sierra Vista-Douglas, AZ	256	22	8.5	1,800	-	0.0
COLORADO	**23,088**	**(880)**	**-3.8**	**452,900**	**(600)**	**-0.1**
Denver-Aurora-Lakewood, CO	13,745	(1,140)	-8.3	223,400	10,400	4.9
Greeley, CO	2,604	(269)	-10.3	42,200	(500)	-1.2
Colorado Springs, CO	2,535	43	1.7	35,100	(500)	-1.4
Fort Collins, CO	1,586	22	1.4	44,700	400	0.9
Grand Junction, CO	823	(100)	-12.1	9,200	(200)	-2.1
Boulder, CO	763	(30)	-4.0	57,100	(2,900)	-4.8
Pueblo, CO	455	(22)	-4.8	13,800	(300)	-2.1
IDAHO	**7,453**	**199**	**2.7**	**206,800**	**(1,400)**	**-0.7**
Boise City, ID	3,961	381	9.6	89,100	500	0.6
Coeur d'Alene, ID	693	(113)	-16.3	17,700	2,100	13.5
Idaho Falls, ID	598	(22)	-3.6	14,600	500	3.5
Pocatello, ID	277	13	4.7	6,900	-	0.0
Lewiston, ID	238	17	7.3	10,700	(800)	-7.0
MONTANA	**4,290**	**39**	**0.9**	**57,900**	**(5,700)**	**-9.0**
NEW MEXICO	**6,353**	**(251)**	**-4.0**	**79,800**	**(6,600)**	**-7.6**
Albuquerque, NM	3,198	(82)	-2.6	46,900	(3,600)	-7.1
Las Cruces, NM	498	4	0.9	8,300	200	2.5
Santa Fe, NM	433	48	11.0	2,400	(200)	-7.7
NEVADA	**12,380**	**(295)**	**-2.4**	**173,900**	**(5,000)**	**-2.8**
Las Vegas-Henderson-Paradise, NV	9,174	26	0.3	75,200	(2,500)	-3.2
Reno, NV	2,396	(48)	-2.0	76,700	-	0.0
UTAH	**15,843**	**1,187**	**7.5**	**407,300**	**(5,800)**	**-1.4**
Salt Lake City, UT	6,569	347	5.3	177,500	(1,900)	-1.1
Provo-Orem, UT	3,753	368	9.8	62,200	200	0.3
Ogden-Clearfield, UT	2,856	61	2.1	105,300	(1,100)	-1.0
St. George, UT	1,140	69	6.1	10,900	400	3.8
Logan, UT	464	35	7.5	37,700	1,000	2.7
WYOMING	**3,153**	**(54)**	**-1.7**	**30,700**	**300**	**1.0**
Cheyenne, WY	481	(61)	-12.6	4,300	100	2.4
Casper, WY	347	(30)	-8.7	4,800	(600)	-11.1

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

All employment data for Construction and Manufacturing is in thousands and represents the percent change in three-month moving averages from June 2019–Aug. 2019 and June 2020-Aug. 2020. Source: Current Employment Statistics from the Bureau of Labor Statistics.

Electrical contractor employment is an *EW* estimate based on internal data and data from the U.S. Bureau of Labor Statistics. Core Electrical Potential is the combined total of electrical contractor and industrial sales potential, which typically account for at least 75% of a full-line electrical distributor's sales.

With fast-growing cities like Denver, Las Vegas, Phoenix, Salt Lake City, and Boise, ID, you can always count on this region for a whole bunch of interesting construction projects. This year is no exception. Count Boise and Couer d'Alene, ID; Provo and St. George, UT; Phoenix; and Reno, NV, among the fastest-growing residential markets in the country. And there's no surprise that the region is seeing lots of new data centers, with new facilities planned or under-way in Goodyear and Mesa, AZ; and Las Vegas and Reno, NV. Two large wind farms also broke ground this year, a 240-turbine Xcel Energy facility in Roosevelt County, NM, and the $406-million Pryor Mountain wind farm in Bridger, MT. Phoenix is also home to a $750-million light-rail expansion project.

2021 % OF U.S. SALES

7.4%

MOUNTAIN

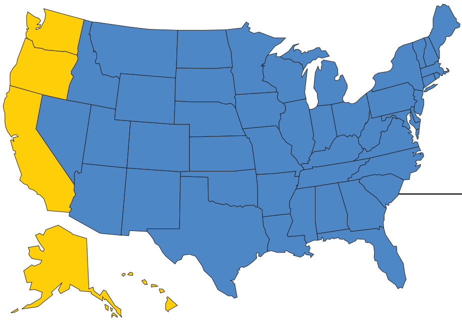
SALES POTENTIAL BY STATE ($ MILLIONS)

	Core Electrical Potential	% of Region	Total Industrial	Electrical Contractor
MOUNTAIN	**9,563.7**		**6,202.5**	**3,361.2**
Arizona	2,340.5	24.5%	1,441.3	899.2
Colorado	2,306.2	24.1%	1,515.0	791.2
Idaho	850.3	8.9%	489.1	361.3
Montana	382.6	4.0%	281.5	101.2
Nevada	1,116.2	11.7%	812.4	303.8
New Mexico	556.3	5.8%	416.8	139.4
Utah	1,751.1	18.3%	1,039.5	711.6
Wyoming	260.5	2.7%	206.9	53.6

METROS WITH THE MOST SALES POTENTIAL

(in millions of dollars)

	State	Core Electrical Potential	Electrical Contractor	Total Industrial
Phoenix-Mesa-Scottsdale	AZ	1,813.3	1,130.5	682.7
Denver-Aurora-Lakewood	CO	1,292.2	901.9	390.3
Salt Lake City	UT	741.2	431.1	310.1
Las Vegas-Henderson-Paradise	NV	733.3	601.9	131.4
Boise City	ID	415.5	259.9	155.7
Ogden-Clearfield	UT	371.3	187.4	184.0
Provo-Orem	UT	354.9	246.2	108.7
Tucson	AZ	297.2	156.4	140.8



Pacific

Alaska • California • Hawaii • Oregon • Washington

We had to triple-check our numbers for this region when we saw that California accounts for 70% of the Core Electrical Potential data, but the data was correct. The Golden State has an enormous impact on the electrical market. While cost of living is a concern and the work-at-home trend during the coronavirus has some economists wondering about what's going to happen with all those high-priced apartments and office space in San Francisco, San Jose San Diego and Los Angeles, there's still a ton of commercial construction activity to consider. Related Companies has an $8-billion mixed-use project underway in Santa Clara, CA, and downtown San Jose is seeing hundreds of millions in new commercial development. San Diego is redeveloping its waterfront, and Los Angeles is attracting new residents downtown . Don't sleep on Seattle or Portland – there's still plenty of big projects on tap, including airport work, light rail and downtown redevelopment.

2021 % OF U.S. SALES

16.2%

PACIFIC

SALES POTENTIAL BY STATE ($ MILLIONS)

	Core Electrical Potential	% of Region	Total Industrial	Electrical Contractorl
PACIFIC	**19,503.1**		**10,544.5**	**8,958.6**
Alaska	218.4	1.1%	141.9	76.5
California	13,728.3	70.4%	7,298.4	6,429.8
Hawaii	378.3	1.9%	318.7	59.6
Oregon	1,899.5	9.7%	937.8	961.7
Washington	3,278.6	16.8%	1,847.6	1,431.0

METROS WITH THE MOST SALES POTENTIAL

(in millions of dollars)

	State	Core Electrical Potential	Electrical Contractor	Total Industrial
Los Angeles-Long Beach-Anaheim	CA	4,535.6	2,139.4	2,396.2
Seattle-Tacoma-Bellevue	WA	1,961.9	1,083.9	878.0
San Francisco-Oakland-Hayward	CA	1,647.2	985.2	661.9
Riverside-San Bernardino-Ontario	CA	1,357.3	880.9	476.4
San Jose-Sunnyvale-Santa Clara	CA	1,303.3	434.2	869.1
Portland-Vancouver-Hillsboro	OR-ID	1,296.8	662.5	634.3
San Diego-Carlsbad	CA	1,260.7	692.4	568.3
Sacramento-Roseville-Arden-Arcade	CA	735.7	560.4	175.2

EMPLOYMENT STATISTICS

Area	Electrical Contractor Estimate	YOY # Change	YOY % Change	Industrial Employment	YOY # Change	YOY % Change
ALASKA	**2,162**	**(290)**	**-13.4**	**43,800**	**(17,100)**	**-28.1**
Anchorage, AK	1,270	(256)	-20.1	8,000	(600)	-7.0
Fairbanks, AK	390	(39)	-10.0	2,100	300	16.7
CALIFORNIA	**111,228**	**(6,231)**	**-5.6**	**3,680,500**	**(313,700)**	**-7.9**
Los Angeles-Long Beach-Anaheim, CA	32,604	(1,109)	-3.4	1,371,600	(129,900)	-8.7
San Francisco-Oakland-Hayward, CA	15,015	(1,920)	-12.8	378,900	(53,200)	-12.3
Riverside-San Bernardino-Ontario, CA	13,425	(741)	-5.5	272,700	(32,400)	-10.6
San Diego-Carlsbad, CA	10,552	(563)	-5.3	325,300	(22,200)	-6.4
Sacramento-Roseville-Arden-Arcade, CA	8,541	(802)	-9.4	100,300	(8,900)	-8.2
San Jose-Sunnyvale-Santa Clara, CA	6,617	(407)	-6.2	497,500	(22,400)	-4.3
Fresno, CA	2,340	(204)	-8.7	76,600	(3,500)	-4.4
Oxnard-Thousand Oaks-Ventura, CA	2,219	(43)	-2.0	74,900	(4,600)	-5.8
Santa Rosa, CA	2,132	(74)	-3.5	73,400	2,900	4.1
Bakersfield, CA	2,132	(26)	-1.2	36,200	(2,600)	-6.7
Stockton-Lodi, CA	1,655	(100)	-6.0	56,100	(4,200)	-7.0
Vallejo-Fairfield, CA	1,634	(30)	-1.9	34,700	(2,700)	-7.2
Modesto, CA	1,278	(126)	-9.8	64,300	(2,800)	-4.2
Santa Maria-Santa Barbara, CA	1,235	78	6.3	37,600	(1,600)	-4.1
San Rafael, CA Metropolitan Division	966	(61)	-6.3	15,700	(100)	-0.6
San Luis Obispo-Paso Robles-Arroyo Grande, CA	923	(160)	-17.4	18,800	(4,900)	-20.7
Visalia-Porterville, CA	880	30	3.4	35,700	(2,700)	-7.0
Salinas, CA	832	(22)	-2.6	14,200	(1,900)	-11.8
Napa, CA	620	(22)	-3.5	38,000	(4,500)	-10.6
Santa Cruz-Watsonville, CA	611	13	2.1	18,900	(2,600)	-12.1
Chico, CA	559	(48)	-8.5	12,300	(600)	-4.7
Redding, CA	529	(13)	-2.5	6,900	(800)	-10.4
Yuba City, CA	377	(26)	-6.9	5,100	(1,800)	-26.1
Merced, CA	360	4	1.2	29,100	(3,200)	-9.9
Madera, CA	260	4	1.7	9,700	(600)	-5.8
El Centro, CA	260	9	3.3	6,000	900	17.6
Hanford-Corcoran, CA	130	-	0.0	15,000	(600)	-3.8
HAWAII	**4,858**	**30**	**0.6**	**34,100**	**(7,800)**	**-18.6**
Urban Honolulu, HI	3,579	87	2.4	26,400	(6,300)	-19.3
Kahului-Wailuku-Lahaina, HI	537	(30)	-5.6	3,300	(300)	-8.3

(Continued on page 33)

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(EAST NORTH CENTRAL — *Continued from page 26*)

EMPLOYMENT STATISTICS

Area	Electrical Contractor Estimate	YOY # Change	YOY % Change	Industrial Employment	YOY # Change	YOY % Change
OHIO	**29,397**	**(1,660)**	**-5.6**	**1,985,000**	**(129,500)**	**-6.1**
Cincinnati, OH-KY-IN	6,296	(100)	-1.6	339,700	(23,500)	-6.5
Columbus, OH	5,577	(399)	-7.1	211,000	(11,300)	-5.1
Cleveland-Elyria, OH	5,443	61	1.1	347,200	(24,700)	-6.6
Toledo, OH	2,028	(100)	-4.9	136,900	(5,300)	-3.7
Akron, OH	1,967	(160)	-8.1	115,800	(3,900)	-3.3
Dayton, OH	1,655	(173)	-10.5	127,500	(4,200)	-3.2
Canton-Massillion, OH	1,161	(56)	-4.9	71,100	(9,200)	-11.5
Youngstown-Warren-Boardman, OH-PA	958	(386)	-40.3	69,100	(8,300)	-10.7
Mansfield, OH	269	(30)	-11.3	25,800	(3,900)	-13.1
Lima, OH	264	(43)	-16.4	26,400	(1,400)	-5.0
Weirton-Steubenville, OH	238	(9)	-3.6	16,000	(600)	-3.6
Springfield, OH	169	-	0.0	19,000	(2,200)	-10.4
WISCONSIN	**17,221**	**(165)**	**-1.0**	**1,385,800**	**(87,400)**	**-5.9**
Milwaukee-Waukesha-W. Allis, WI	4,780	251	5.3	329,000	(35,900)	-9.8
Madison, WI	2,604	82	3.2	103,100	(8,700)	-7.8
Appleton, WI	1,200	(61)	-5.1	70,900	(4,200)	-5.6
Green Bay, WI	1,105	(9)	-0.8	93,900	(2,100)	-2.2
Oshkosh-Neenah, WI	815	61	7.4	63,100	(4,700)	-6.9
Eau Claire, WI	550	(9)	-1.6	33,500	700	2.1
Fond du Lac, WI	507	56	11.1	34,400	(600)	-1.7
Janesville-Beloit, WI	464	(17)	-3.7	28,800	(3,600)	-11.1
Racine, WI	438	(4)	-1.0	53,800	400	0.7
La Crosse-Onalaska, WI	412	(13)	-3.2	24,400	(1,800)	-6.9
Wausau, WI, WI	368	(13)	-3.5	57,300	700	1.2
Sheboygan, WI	308	(4)	-1.4	64,700	(5,400)	-7.7

(PACIFIC — *Continued from page 32*)

EMPLOYMENT STATISTICS

Area	Electrical Contractor Estimate	YOY # Change	YOY % Change	Industrial Employment	YOY # Change	YOY % Change
OREGON	**14,291**	**(364)**	**-2.5**	**550,500**	**(51,200)**	**-8.5**
Salem, OR	1,625	(4)	-0.3	37,300	(5,000)	-11.8
Eugene, OR	1,005	(17)	-1.7	41,300	(1,500)	-3.5
Bend-Redmond, OR	992	22	2.2	15,600	(1,800)	-10.3
Medford, OR	646	4	0.7	21,900	(2,300)	-9.5
Albany, OR	386	(56)	-14.6	26,000	(200)	-0.8
Corvallis, OR	195	(9)	-4.4	8,300	(1,000)	-10.8
Grants Pass, OR	134	(13)	-9.7	9,400	100	1.1
Portland-Vancouver-Hillsboro, OR	10,097	(22)	-0.2	363,100	(27,600)	-7.1
WASHINGTON	**28,158**	**(1,205)**	**-4.3**	**819,100**	**(72,900)**	**-8.2**
Seattle-Tacoma-Bellevue, WA	16,519	(615)	-3.7	502,600	(56,000)	-10.0
Spokane-Spokane Valley, WA	1,833	(264)	-14.4	53,900	(1,100)	-2.0
Kennewick-Richland, WA	1,369	(22)	-1.6	25,100	(1,700)	-6.3
Bellingham, WA	953	(91)	-9.5	31,200	(1,500)	-4.6
Olympia-Tumwater, WA	828	(82)	-9.9	8,700	(600)	-6.5
Bremerton-Silverdale, WA	628	(61)	-9.7	8,700	100	1.2
Yakima, WA	563	(13)	-2.3	26,900	500	1.9
Mount Vernon-Anacortes, WA	533	(117)	-22.0	17,100	(1,300)	-7.1
Longview, WA	468	-	0.0	19,700	(500)	-2.5
Wenatchee, WA	351	(56)	-16.0	7,600	(500)	-6.2
Walla Walla, WA	191	35	18.2	12,700	(300)	-2.3

(SOUTH ATLANTIC — *Continued from page 28*)

EMPLOYMENT STATISTICS

Area	Electrical Contractor Estimate	YOY # Change	YOY % Change	Industrial Employment	YOY # Change	YOY % Change
GEORGIA	**26,078**	**(650)**	**-2.5**	**1,150,700**	**(72,400)**	**-5.9**
Atlanta-Sandy Springs-Roswell, GA	16,566	(451)	-2.7	480,400	(37,200)	-7.2
Augusta-Richmond County, GA	2,726	104	3.8	68,900	(300)	-0.4
Savannah, GA	1,075	35	3.2	52,800	(4,100)	-7.2
Columbus, GA	620	(9)	-1.4	30,400	(2,100)	-6.5
MARYLAND	**22,555**	**412**	**1.8**	**318,100**	**(23,900)**	**-7.0**
Baltimore-Columbia-Towson, MD	11,340	559	4.9	171,300	(8,900)	-4.9
Silver Spring-Frederick-Rockville, MD	4,390	(225)	-5.1	56,100	(1,400)	-2.4
Hagerstown-Martinsburg, MD	572	(9)	-1.5	21,800	(6,900)	-24.0
NORTH CAROLINA	**29,016**	**(1,460)**	**-5.0**	**1,320,100**	**(117,200)**	**-8.2**
Charlotte-Concord-Gastonia, NC	8,831	(130)	-1.5	312,600	(22,200)	-6.6
Raleigh, NC	5,408	13	0.2	99,400	(11,700)	-10.5
Greensboro-High Point, NC	2,045	(30)	-1.5	136,200	(24,900)	-15.5
Winston-Salem, NC	1,369	(139)	-10.1	93,200	(6,600)	-6.6
Asheville, NC	1,339	17	1.3	61,200	(5,800)	-8.7
Durham-Chapel Hill, NC	1,226	17	1.4	63,700	(20,700)	-24.5
Wilmington, NC	1,187	(30)	-2.6	21,000	3,000	16.7
Fayetteville, NC	680	(100)	-14.6	23,300	(2,800)	-10.7
Hickory-Lenoir-Morganton, NC	572	(26)	-4.5	107,400	(18,400)	-14.6
Greenville, NC	507	13	2.6	18,800	(900)	-4.6
Burlington, NC	442	(4)	-1.0	24,100	(3,800)	-13.6
Rocky Mount, NC	368	(4)	-1.2	23,500	(5,200)	-18.1
SOUTH CAROLINA	**14,083**	**65**	**0.5**	**766,700**	**(12,700)**	**-1.6**
Charleston-North Charleston, SC	2,808	(69)	-2.5	89,700	(700)	-0.8
Greenville-Anderson-Mauldin, SC	2,518	(9)	-0.3	172,100	(1,100)	-0.6
Columbia, SC	2,301	39	1.7	94,800	(2,100)	-2.2
Myrtle Beach-Conway-North Myrtle Beach, SC	1,430	-	0.0	13,500	(700)	-4.9
Spartanburg, SC	1,018	4	0.4	117,900	5,700	5.1
VIRGINIA	**27,525**	**589**	**2.1**	**691,200**	**(42,000)**	**-5.7**
Richmond, VA	5,248	(48)	-0.9	90,100	(5,400)	-5.7
Virginia Beach-Norfolk-Newport News, VA	5,170	65	1.3	171,700	(5,000)	-2.8
Roanoke, VA	1,226	39	3.2	44,100	(2,300)	-5.0
Lynchburg, VA	754	(39)	-5.2	44,200	(300)	-0.7
Charlottesville, VA	611	(160)	-26.2	12,200	(600)	-4.7
WEST VIRGINIA	**4,455**	**(572)**	**-12.8**	**139,300**	**(2,200)**	**-1.6**
Huntington-Ashland, WV	971	(78)	-8.0	32,600	(800)	-2.4
Charleston, WV	906	(39)	-4.3	9,000	(700)	-7.2