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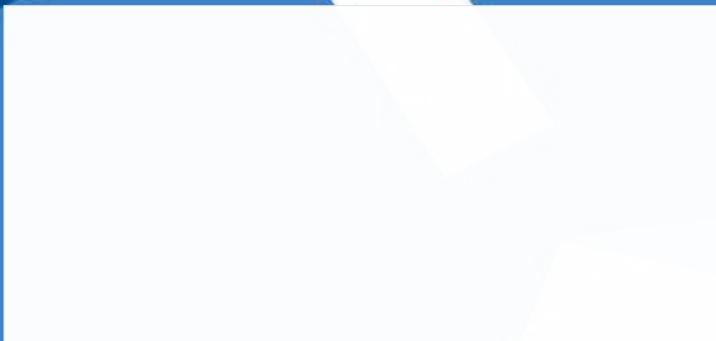
MAY/JUNE 2023

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THE TOP 150

*Competition Intensifies in
Today's Uncertain Economy.
Read more on pg. 16*



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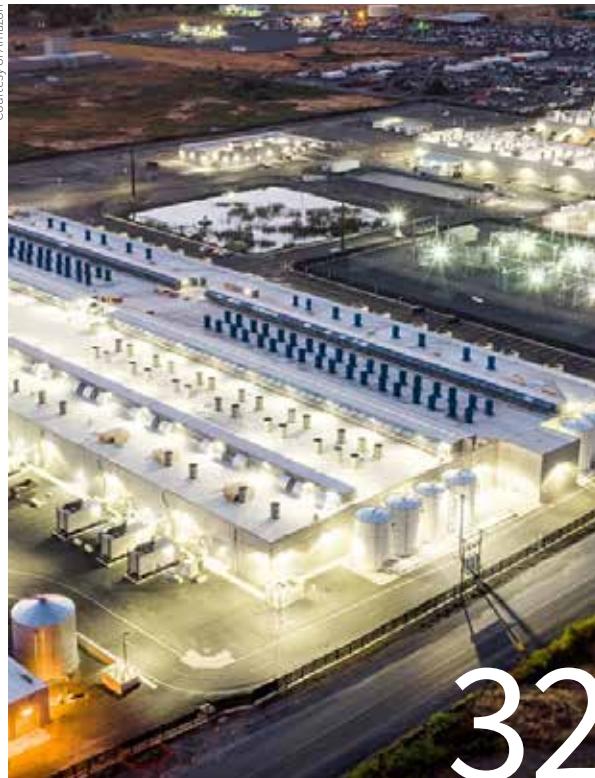
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Making the right connections

Green Shoots Despite a Potential Drought

Top 150 distributors continue to invest in their businesses despite an uncertain economy.

After reading through Top 150 survey responses from more than 100 senior executives at electrical supply houses, I came away impressed with the resiliency of these industry leaders.

They were optimistic in their 2023 revenue forecasts and unafraid to invest in new business ventures to grow their companies. They are also realists, and the majority of them sense that we are either already in a recession or will see the U.S. economy slip into one by 1Q 2024.

Walking on the sunny side of the street. More than half of the 93 execs who offered 2023 growth forecasts said they expect double-digit growth this year, and only six distributors said they don't expect any growth at all. None forecast a decline in sales.

Despite a possible recession on the horizon, they are quite confident in their ability to manage in any business climate.

Supplying trophy jobs. Many economic indicators point to a slowdown in the construction industry. However, Top 150 distributors are currently involved with or expect to be supplying EV battery and semiconductor plants, data centers, airports, utility grid revitalization, ports, hospitals and even some downtown office construction.

Sometimes, the fastest-growing project business they are involved with is in a tightly defined niche. For Jo-Kell Inc., Chesapeake, VA, car washes have been solid business. "The largest

projects we have seen (and see in the immediate future) are in the automatic car wash OEM sector," said John Kelly, the company's chief corporate officer. "Our business in that market tripled in the past year, and we expect even more growth over the next year."



Investing in new branches. Opening a new branch location is one of the largest capital expenditures a distributor can make, but in 2022 and 2023, Top 150 distributors were playing the long game and branching out on a grand scale.

City Electric Supply (CES), Dallas, opened more new branches than any other distributor over the past 12 months, launching 50 new locations. The company currently has 592 U.S. branches and 76 locations in Canada.

Branch expansion has always been an important growth strategy for Elliott Electric Supply, Nacogdoches, TX, too, and in the past year the company

opened new locations in Dripping Springs, and Forney, TX; Denver; and Shawnee, OK. Crescent Electric Supply, East Dubuque, IL, also opened multiple locations with new branches in Des Moines, IA; Louisville, KY; and Seattle. Wholesale Electric Supply, Texarkana, TX, opened five new locations, and Chelsea Lighting, New York, opened locations in Chicago, Philadelphia and Fort Lauderdale, FL.

Overcoming long lead times.

Like distributors, electrical manufacturers are also managing their businesses in the face of tough economic conditions. Two Top 150 distributors said electrical manufacturers are currently devoting more resources to strengthening their supply chain than on launching new products. Said John Eggleton, president & CEO, Kirby Risk Electrical Supply, Lafayette, LA, "Manufacturers are focused on managing their supply chains and adjusting specs accordingly but seem to be holding off on innovation."

Molly Sheehan, ESG business analyst, Turtle & Hughes, Linden, NJ, is thinking along the same lines. "Manufacturing resources in new product development have been dedicated to supply chain resiliency," she said. "We have not seen many new products launched."

Tom Nelson, communications director, Border States, Fargo, ND, succinctly summarized the optimistic tone I saw in this year's Top 150 responses.

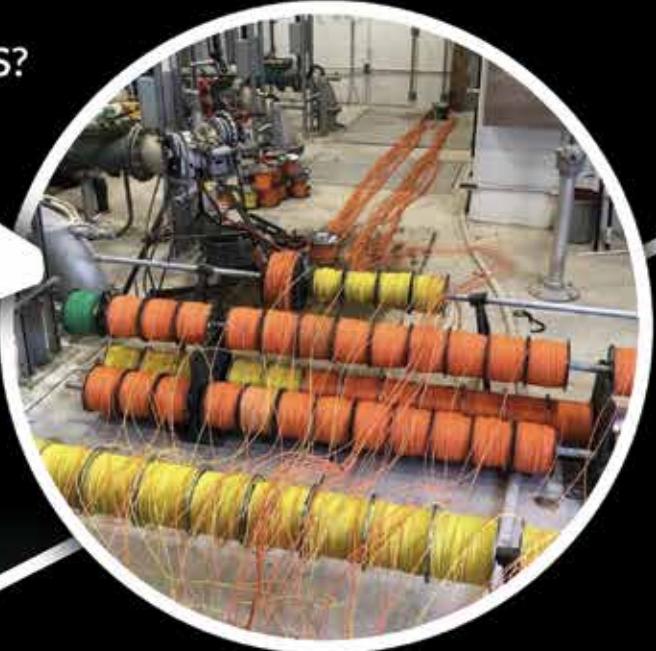
"To be in distribution today has never been more rewarding," he wrote in his response. "The supply chain challenges that exist require distributors to collaborate between manufacturers and customers more than ever before. Distributors are a more important part of the supply chain than ever before."

"Our industry is growing in awareness, and the next-generation workforce is intentionally getting engaged and involved. Exciting times for the distributor of the future!" **EW**

By Jim Lucy, Editor-In-Chief

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Dodge Construction Data Points to Market Slowdown

Dodge Construction Network recently published several reports showing a loss of momentum in the construction market. The Dodge Momentum Index (DMI), issued by Dodge Construction Network, fell -5.1% in April to 180.9 points (2000=100) from the revised March reading of 190.6 points. In April, the commercial component of the DMI fell -8%, and the institutional component improved +0.3%. 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.

"On par with our expectations, the Dodge Momentum Index continued to recede in April, due to declining economic conditions and ongoing banking uncertainty," said Sarah Martin, associate director of forecasting for Dodge Construction Network, in the press release. "Weaker commercial planning is driving the DMI's decline, as it's more exposed to real-time economic changes than the largely publicly funded institutional segment."

Commercial planning in April was pushed down by sluggish office, hotel and retail activity. Institutional planning remained flat, as weak education planning offset growth in

healthcare and amusement projects. Year-over-year, the DMI was +11% higher than in April 2022.

A total of 16 projects with a value of \$100 million or more entered planning in April. The largest commercial projects included the \$450-million Desert Diamond Casino in Glendale, AZ, and the \$350-million Global Energy Park research and development laboratory in Golden, CO.

Dodge Construction also said the most recent JOLTS data (Job Openings and Labor Turnover Survey) published by the U.S. Bureau of Labor Statistics points to a cooling off in construction employment. Job openings in the construction industry fell from 404,000 in February to 341,000 in March. Said Dodge in the press release, "Although hires increased 33,000 in the construction industry, layoffs and discharges more than offset this gain with an increase of 112,000. This data has been volatile of late, reflecting the ebb and flow of project starts and completions. This is likely to continue through the year as Dodge Construction Network construction starts ease due to the slowing economy. Regardless, lack of skilled labor will serve to hold back industry growth in the years to come."

AMAZON GOING GREEN IN OREGON DATA CENTER EXPANSION

A recent post in at www.datacenterfrontier.com highlighted just how much Amazon has invested in its data centers in Oregon, and its commitment to working with the local community to build new facilities with an eye toward sustainability.

According to the post, "Amazon Web Services says it has invested \$15 billion in its cloud cluster in Oregon, which has become the primary West Coast deployment zone for the AWS cloud platform. The company is continuing to expand in Oregon, with plans to build more data centers in Morrow County and billions of dollars of additional investment. As it grows, the huge cloud platform is pursuing new strategies to procure power with the necessary scale and sustainability."

A post on Amazon's website said the company recently partnered with Umatilla Electric Cooperative (UEC) — the electric cooperative serving AWS in Oregon's Umatilla and Morrow Counties — to create a solution that safely and reliably powers its data centers in the region and keeps Amazon on a path to achieving 100% renewable energy by 2025.

"The agreement allows Amazon to take on the responsibility of selecting the energy supply that powers its data center operations, including from renewable energy resources," the post said. "UEC continues to be an essential partner and provider of reliable utility service

to AWS data centers in UEC's service territory. Amazon's energy supply from our utilities, combined with our renewable energy procurement across the United States, has enabled several AWS data center regions — including its U.S. West (Oregon) Region — to be powered with at least 95% renewable energy.

"In addition to AWS investing over \$15 billion in the state economy since 2011 and recycling up to 96% of AWS cooling water to provide millions of gallons of water to local farmers each year, we're now able to directly invest in renewable energy across the Pacific Northwest to help power AWS operations in Oregon. We're grateful for the collaboration with UEC, which will help us stay on a path to meeting 100% renewable energy by 2025," said Charley Daitch, director of Energy and Water at AWS.

Amazon said in the past that the energy supply agreement with UEC continues Amazon's efforts to both innovate and collaborate with local groups to decarbonize AWS's operations. Last year, AWS shared how it partnered with American Rock Products, a 40-year-old construction materials company located in Pasco, WA, to develop a new, more sustainable concrete mix that will lower the carbon footprint of new data centers in Oregon as well as drive broader innovation to help make construction materials more sustainable.



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Sonepar to Buy Butler's Electric Supply in North Carolina

Sonepar plans to acquire Butler's Electric Supply, Wilmington, NC. A family-owned business since 1948, Butler's Electric branch locations will be integrated into Sonepar's Capital Electric brand at closing. Focused on small residential and commercial contractors, the Butler's Electric Supply acquisition brings Capital Electric the opportunity to expand its business along coastal North Carolina.

Drew Esce, president of Capital Electric, said in the press release, "Butler's Electric is a well-respected distributor who we believe has solid growth potential, especially within the commercial segment. I look forward to welcoming the Butler's Electric team to Capital Electric and leveraging our companies' strengths to expand our business opportunities together."

Commenting on the acquisition, James Butler, owner of Butler's Electric Supply, said in the press release, "My father founded this company 75 years ago. We're very thankful for the associates and customers who brought us to this moment. It was important to me that both would be well-served in the transition of ownership. We found the right partner in Sonepar as they will bring the resources and opportunities necessary to remain competitive for the future."

Graybar Buys Valin Corp.

Graybar Electric Co., St. Louis, has entered into an agreement to acquire Valin Corp., a distributor of automation, filtration, fluid handling, heating and process control products and systems.

Headquartered in San Jose, CA, Valin provides technical solutions for the technology, energy, life sciences, natural resources and transportation industries. The company was founded in 1974 and operates 12 locations in the western and southwestern United States. As a subsidiary of Graybar, the company will continue to operate under the Valin name with the same leadership team, employees and suppliers. The company is ranked #49 on *Industrial Distribution*'s most recent Top 50 list with \$125 million in 2021 sales and 161 employees.

Kathleen Mazzarella, chairman, president and CEO of Graybar, said in the press release, "As Graybar expands its industrial automation platform, Valin's portfolio of products, solutions and technical resources complements our existing capabilities and provides a foundation for growth into new markets."

Over the past year, Graybar also acquired Walker Industrial Products, an automation distributor based in Newtown, CT; New England Drives & Controls, an automation distributor based in Southington, CT (through its Shingle & Gibb business); and CX Connexion, Buffalo Grove, IL.

EW NEWS ANALYSIS

nVent Acquires ECM Industries

ECM Investors, the parent company of ECM Industries, signed an agreement to be acquired by nVent Electric plc. nVent's stable of electrical brands includes Caddy, Erico, Hoffman, Raychem, Schroff and Tracer. The company is based in St. Louis Park, MN.

Brands in the ECM Industries portfolio include ILSCO, Utilco, Gardner Bender, Sperry Instruments, Bergen Industries and King Innovation. These brands have been supplying electricians, do-it-yourselfers, contractors and maintenance technicians with a wide variety of innovative products for more than 125 years. According to the press release, the ECM brands are widely stocked and distributed through electrical distributors, retail sellers, catalog houses and e-commerce distributors.

Osterman Fox & Associates' New England Operations Merges with Apogee Solutions

Two East Coast reps recently announced a merger. Osterman Fox and Associates' New England operations and Apogee Solutions Group, Winchester, MA, have permanently merged their sales and marketing teams for better synergies, improved territory coverage and increased sales opportunities.

The combined company will be the New England Division of Osterman Fox and Associates and will operate under the name Osterman Fox – Apogee LLC. The new company will have four owner/partners: Frank Kaduc, Chris Fox, Dan Murphy and V.J. Ladd.

Based in Syracuse, Osterman Fox has served the industrial, commercial residential and OEM electrical markets in upstate New York for more than 80 years and New England for five years.

Apogee Solutions Group serves New England's electrical and electronic markets. The company's staff serves these market niches with more than 75 years of local, national and international experience. Along with the electrical market, Apogee focuses on the military/aerospace, medical, transportation, contract manufacturing, cable assembly, panel building, industrial and industrial automation businesses.

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VITAL STATISTICS

CONSTRUCTION

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

	Mar '23 ¹	Feb '23 ²	Mo. % Change	Mar '22	YTY % Change
Total Construction	1,834.70	1,829.60	0.30	1,768.20	3.8
Total Private Construction₁	1,435.10	1,430.80	0.30	1,420.60	1
Residential	827.7	829.1	-0.2	920	-10
New single family	366.3	369.2	-0.8	474.9	-22.9
New multifamily	123.2	122.8	0.4	100.2	23
Nonresidential	607.4	601.6	1	500.6	21.3
Lodging	22	22	0.3	15.9	38.9
Office	84.3	84.1	0.3	72.3	16.6
Commercial	121	122	-0.8	100.8	20.1
Health care	44.8	44.6	0.6	40.3	11.2
Educational	21.3	21	1.5	18.1	17.9
Religious	2.9	3.1	-4.1	2.9	2.4
Amusement and recreation	14.9	14.8	0.4	13	14.9
Transportation	19.2	19.4	-1.1	14.4	33.8
Communication	24.7	24.8	-0.5	23.5	4.8
Power	102.1	102.4	-0.3	107.1	-4.7
Electric	78.4	78.6	-0.2	82.9	-5.4
Manufacturing	147	140.6	4.6	90.4	62.5
Total Public Construction (\$ billions)₂	399.6	398.8	0.2	347.5	15
Residential	9.9	9.8	0.8	9	9.7
Nonresidential	389.8	389.1	0.2	338.6	15.1
Office	12.9	13.1	-1.4	12	7.4
Commercial	4.4	4.4	0.7	3.5	25.7
Health care	11.8	12	-2.3	10.7	9.8
Educational	86.9	86.3	0.7	79.7	9.1
Public safety	11.2	11.6	-3.3	10.9	2.9
Amusement and recreation	14.4	14.4	-0.1	13	10.3
Transportation	42	42.7	-1.6	40.1	4.8
Power	11.6	11.7	-0.8	9.9	16.8
Highway and street	121.7	121.8	-0.1	100.2	21.4
Sewage and waste disposal	36.6	36.3	0.7	29.4	24.2
Water supply	23.8	23.5	1.1	19	25.5
Conservation and development	11.7	10.4	12.4	9.3	25.8
Housing Starts (SAAR)	Apr '23¹	Mar '23²	Mo. % Change	Apr '22	YTY % Change
Total (thousands of units)	1,401	1,371	2.2%	1,803	-22.3%
Single-family (thousands of units)	846	833	1.6%	1,176	-28.1%
Multi-family (thousands or units)	542	515	5.2%	614	-11.7%

EMPLOYMENT WAGE & PRICE STATISTICS

Employment, Electrical Contractors (thousands) ₄	Mo. Month	Latest	Mo. % Change	Year ago	YTY % Change
Hourly wage, Electrical Contractors (\$) ₄	MAR	1030	0.0	965.4	6.7
Copper prices (cents per pound)	MAR	35.79	0.9	32.03	11.7
	APR	400.32	-1.1	439.8	-9

INDUSTRIAL MARKET

Electrical Mfrs' Shipments (\$ millions)	Mo. Month	Latest	Mo. % Change	Year ago	YTY % Change
Electrical Mfrs' Inventories (\$ millions SA) ₂	MAR	4,592	1.9	3,636	26.3
Electrical Mfrs' Inventory-to-Shipment ratio	MAR	9,588	1	7,106	34.9
Electrical Mfrs' New Orders (\$ millions SA) ₂	MAR	2,088	-0.9	1,954	6.8
Machine Tool Orders (\$ millions) ₆	MAR	4,503	-0.4	3,988	12.9
Industrial Capacity Utilization (percent, SA)	MAR	536.58	16.7	476.95	12.5
	APR	78.32	0.9 pts.	77.1	1.6 pts.

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

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

NEMA'S EBCI INDEX TAKES A TUMBLE IN APRIL

After a momentary bump into expansionary territory in February, followed by a brief hold at "unchanged" last month, the current conditions component of NEMA's ElectroIndustry Business Conditions Index (EBCI) signaled cooling in April with a nearly seven-point retreat to 43.3 points.

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.

The share of participants reporting "unchanged" conditions declined precipitously this month, and although several respondents noted "better" conditions, many more indicated that conditions were "worse" in April. Comments displayed evidence of this dichotomy as one described "slowing demand across most segments," even as another declared "records and more records."

Following a similar path — from solidly expansionary two months ago, then remaining "unchanged" in March — the future conditions component also slid into the range suggesting a slowdown ahead. This change is marked by a 10-point drop, resulting in an April reading of 40 points. Although the data suggest a turbulent future, the comments received were, at worst mixed. They highlighted headwinds to an otherwise positive outlook, while also noting strong backlog and an expected boost from infrastructure and efficiency spending.

Despite signs of a slowdown in the overall U.S. economy, several of the key indicators in the chart at the left are still flashing green. Although Electrical Manufacturers' New Orders were down -0.9% in March to \$4,503 million (+12.9% year-over-year (YOY)), Electrical Manufacturers' Shipments were up +1.9% to \$4,592 million (+26.3% YOY).

Electrical contractor employment, another good indicator of the market's health, held steady in March at 1.03 million, a historically high level that's up +6.7% over March 2022. **EW**

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Fromm Electric Supply Celebrating 100th Anniversary

This year marks the 100th anniversary for Fromm Electric Supply, Reading, PA. Founded in 1923 in a small storefront by Alexander Fromm with four employees selling kitchen appliances, the company is still thriving as a multi-generational business and is now one of the largest electrical supply and service firms in the Mid-Atlantic region.

CEO Michael Fromm, who along with his brother Lou, bought the company from their family in 2007, attributes their continued success to prioritizing long-term relationships over short-term gain. "Our allegiance is to our employees, customers and communities rather than to Wall Street analysts," Michael Fromm said in the press release.

The 100-year mark is a rare milestone for most American corporations. According to the U.S. Small Business Administration, fewer than one out of every 1,000 companies make it that far. *Business Week* estimates that only 40% of family-owned companies reach the second generation and 13% are passed down to a third generation.

What is Fromm Electric's magic touch? "We've thrived for as long as we have because our aim is not to just sell



electrical products, but to offer our customers solutions that help them meet their own business objectives," Michael Fromm said in the release.

CES Opens Branch in Fast-Growing Spring Hill, TN

Thirty minutes outside of Nashville, Spring Hill, TN, is recognized as the fourth fastest-growing city in the state, according to the U.S. Census Bureau. To help keep up with the development the area is seeing, City Electric Supply (CES) has opened a location in Spring Hill. The branch is open and ready to serve the community after a two-year long build-out process.

Now, the 9,800-sq-ft facility is complete, open and ready to serve the Spring Hill area. This electrical supply house is one of the first in the city and can be found off the Saturn Parkway. Anyone who drives by can see the building lit up on the hill.

Branch Manager Korey Harris said in the press release, "We're here, we're open and we're in an amazing location. The parkway is right outside of our windows. At night, people can see our building lit up. We're like a light on top of a hill, and the building does its own advertising that way."

Harris, a local to the area, is a former customer of City Electric Supply. He was an electrical contractor for more than five years and did most of his business at CES Cool Springs, where he knew the

team well. Transitioning to the distribution side of the electrical industry, Harris worked at the counter for two years at Cool Springs and did outside sales at CES Nashville North. The opportunity to open CES Spring Hill came up for him at the perfect time.

"I met with the district manager and saw the opportunities CES could provide," said Harris. "This has been a dream scenario for me. To run a store in my hometown is a wonderful opportunity. I know the place, people and customer base. I'm looking forward to seeing what this branch will do to help the customers here in Spring Hill."



CES Spring Hill is positioned between two other existing CES branches. Right in the middle of CES Columbia and Cool Springs, the Spring Hill location will not only help development in Spring Hill, but the branch will help existing CES customers.



ABB Announces Plans for New Factory in Albuquerque, NM

ABB is reinforcing its commitment to the U.S. market and utility industry with the addition of a new manufacturing facility in Albuquerque, NM, for its Installation Products Division, formerly Thomas & Betts. Planning and construction of the new 90,000 sq-ft facility is underway and represents an investment of \$40 million. The greenfield facility will create 55 new jobs in the area and produce cable products used by electric utility providers in grid hardening and resiliency initiatives.

With more than 75,000 miles of underground cabling estimated to be in place by 2040 across the United States, ABB's new facility will meet what the company expects to be increased demand for its Elastimold solutions essential to wildfire mitigation, as well as underground and grid hardening projects that power homes, businesses and communities in a safe and reliable

way. When completed in 2024, the Albuquerque facility will include ABB Robotics technology and digital automation to produce more than 1 million additional units annually — the vast majority will be supplied to U.S. customers.

“As the focus on strengthening the U.S. infrastructure and electric grid intensifies, ABB’s latest investment in Albuquerque will advance our production capabilities and significantly boost capacity to meet the needs of utilities for safe and reliable solutions that are easier to install and maintain,” said Matthias Heilmann, president of ABB Electrification’s Installation Products division. “Continuing to grow our U.S. manufacturing operations and distribution network accelerates our ability to deliver the high-demand electrical products that our partners rely on to manage today’s needs and prepare for tomorrow’s energy demands.”

DSG OPENS NEW BRANCH IN OTSEGO, MN

Dakota Supply Group (DSG), Plymouth, MN, recently celebrated the official grand opening of its new Otsego, MN, location. Special guests included Otsego Mayor Jessica Stockamp; Otsego city council members; Catalina Valencia from the Minnesota Department of Employment and Economic Development; Minnesota House Representative Walter Hudson; Minnesota Senate Eric Lucero; construction partners from RyRyan, Cushwake, Interstate Development and Colliers; and DSG team members.

DSG has been serving customers in Monticello and Otsego for several years and moved from the previous Monticello location. The new location at 7505 Kadler Ave NE, in Otsego has expanded the company’s services to the plumbing, waterworks, on-site sewer, water, and well, HVAC, and electrical needs in this growing area.

Headquartered in Plymouth, MN, DSG is proudly independent, and one of the Midwest’s most diverse distributors of innovative products and solutions for the following industries: electrical; plumbing; HVAC/R; utility; communications;



automation; waterworks; and on-site sewer, water and well. DSG is a 100% employee-owned company with more than 1,000 employee-owners in more than 53 locations across seven states; Iowa, Michigan, Minnesota, Montana, North Dakota, South Dakota and Wisconsin.

INDUSTRY EVENTS

June 12-14, 2023

NAED WOMEN IN INDUSTRY FORUM

Salt Lake City, UT

www.naed.org

June 14-16, 2023

NAED ADVENTURE

Salt Lake City, UT

www.naed.org

September 18-20, 2023

IDEA E-BIZ

Nashville, TN; IDEA

www.idea4industry.com

September 30-October 2, 2023

NECA SHOW

Philadelphia; National Electrical Contractor Association (NECA)
www.necashow.org

October 18-20, 2023

AD ELECTRICAL NORTH AMERICAN MEETING

Dallas; Affiliated Distributors
www.adhq.org

November 6-8, 2023

NAED EASTERN CONFERENCE

Marco Island, FL; www.naed.org

November 8-9, 2023

NEMA ANNUAL MEETING

Manalapan, FL; www.nema.org

January 15-17, 2024

NAED WESTERN CONFERENCE

Austin, TX; www.naed.org

Jan. 30- Feb. 2, 2024

NEMRA ANNUAL CONFERENCE

Dallas, National Electrical Manufacturers Representatives Association
www.nemra.org

Winsupply Names Odessa Winlectric Top Performer

Odessa Winlectric Co., Odessa, TX, managed by Carl Long, president, was named as the top-performing Winsupply company in the electrical category. Long's company has won this award multiple times over the past few years.

Dayton, OH-based Winsupply named Winsupply San Antonio, TX Co., as its overall "Company of the Year." Each year, Winsupply recognizes its top-performing companies in plumbing, heating, ventilation and cooling (HVAC), industrial, electrical, waterworks, pumps, turf irrigation and fire fabrication. Here are the rest of this year's winners:

TOP-PERFORMING WINSUPPLY COMPANIES

Overall: Winsupply San Antonio TX Co., C.J. Hooper, president

Electrical: Odessa Winlectric Co. (TX), Carl R. Long, president

Plumbing: Central Oklahoma Winnelson Co., Keith R. Jones, president

HVAC: Winsupply Houston TX Co., Jason Greagrey, president

Industrial: Thomas Pipe, a Winsupply Co. (AZ), Whalen Ward, president

Waterworks: Kansas City Winwater Co. (MO), Scott Wilson, president

Fire Fab: Newburgh Windustrial Supply Co. (NY), James B. Lucas, president

Pumps: Winsupply Lubbock Tx Co., Blake R. Talkmitt, president

Turf Irrigation: Wyatt Irrigation, a Winsupply Co. (Santa Rosa, Calif.), Scott Leytem, president

OTHER AWARD WINNERS

Turn-Around: Winsupply E Houston – MSI (TX), Jeff Walker, president

Rookie of the Year: Winsupply W. Phoenix (AZ), Allen White, president

Digital: Winsupply San Antonio Tx Co., C.J. Hooper, president

Top ROI: Windsor Winair Co. (CT), Glen Baskin, president

WSS: Portland Winair Co. (CT), Keith Kruysman, president



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THE TOP 150

Despite concerns over a recession, most of 2023's Top 150 distributors expect to power through the uncertain economic climate and log increased revenues this year.

The past three years have been loaded with unique challenges for electrical distributors. They had to adapt to hybrid office strategies and limited customer access during the COVID-19 era; endure the waiting game with product shortages; wrestle with head-spinning price increases; decide how much sales time and inventory to invest in new products like electric-vehicle charging stations and a new generation of LED lighting products; and for some companies, decide if the time was right to sell the family business in the latest wave of M&As.

Despite it all, Top 150 distributor proved once again that they are a resilient bunch. For some companies, 2022 was a banner sales year, and many saw their annual revenues blow past the +4% to +8% annual revenue increase range in the electrical market.

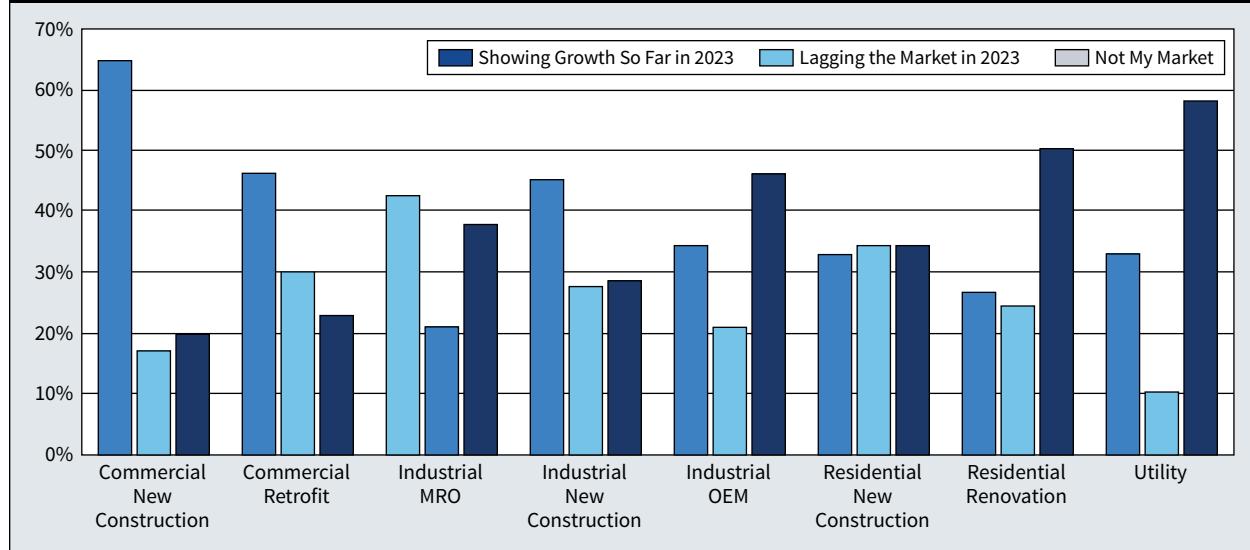
Mike Pratt, CEO, American Electric Supply, Corona, CA, said supplier support and the strong Southern California economy contributed to his company's sales increase in 2022. He applauded the suppliers that allowed the company to have stock for its customers when they needed it. Pratt sees a +8% sales increase in 2023 and says the continuing construction

projects at Los Angeles' LAX airport and anticipated revenues from work related to the 2028 Los Angeles Olympics will support good future growth.

At OmniCable, West Chester, PA, Greg Lampert, president & CEO, said the company's 2022 sales increase was due to the new products, new markets and investment in inventory to serve customers when supplies are tight. Lampert is optimistic about 2023 and is forecasting a +51% increase in revenues.

For some companies, price increases due to inflation accounted for a major portion of revenue increase. In the utility market, Matt Brandup, CEO, Rural

2023 END-USER MARKET STATUS REPORT



Electrical Supply Cooperative (RESCO), Middleton, WI, says inflation accounted for two-thirds of his company's 2022 sales growth and that real growth accounted for 33%. Brandup noted that RESCO's transformer sales increased considerably in 2022. He's expecting a +30% increase in 2023 revenues.

TEC Manufacturing and Distribution Services, Georgetown, TX, is another utility specialist expecting a double-digit increase in 2023 sales. Johnny Andrews, the company's COO, is forecasting a

+11% increase in revenues. He said that in 2022 the biggest driver for the company's sales increase was adding new sole-source alliances for electric cooperatives and municipal electric systems. "TEC manages the total supply chain for those organizations (demand planning, procurement, warehouse operations, inventory management, job kitting and freight logistics)," he said in his response.

A prosperous Canadian economy and growth in the greater Toronto market and in the province of Ontario supported a

2022 revenue increase for O'Neil Electric Supply, Woodbridge, ON. Stephen Kleynhans, the company's president, said in his response that other contributing factors included immigration, an increase in construction spending and the development of enhanced customer service programs. Kleynhans is forecasting a +15% increase in 2023 revenues.

At Jo-Kell Inc., Chesapeake, VA, a tightly defined OEM niche is producing solid growth. "The largest projects we have seen (and see in the immediate



future) are in the automatic car wash OEM sector," said John Kelly, the company's chief corporate officer. "Our business in that market tripled in the past year, and we expect even more growth over the next year."

Acquisition activity. While the national chains (WESCO, Sonepar, Graybar, Rexel and CED) were once again the most active acquirers over two years, some large regional independents including Green Mountain Electric Supply,

Colchester, VT; Elliott Electric Supply, Nacogdoches, TX; Schaedler YESCO Distribution, Harrisburg, PA; and Inline Electric Supply, Huntsville, AL, also made significant acquisitions (See chart on page 19). Bruce Summerville, president, Inline Electric Supply said although his company's acquisition of Williams Electric Supply in the Nashville area last year was a big factor in the company's growth, Inline Electric Supply's revenues were up +30% across its existing footprint.

2023's biggest challenges. Although the majority of Top 150 respondents believe a recession either has already started or will start before year end (see chart on page 24), they were still bullish on their business prospects for 2023. Despite their optimism, they also see some challenges ahead. Concerns over longer lead times persist, and 60% of respondents ranked longer lead times as top challenges in 2023 (See chart on page 25). American Electric's Mike

THE 25 DISTRIBUTORS WITH THE HIGHEST SALES-PER-EMPLOYEE

As in the past, specialty distributors, which tend to have fewer customers and employees than full-line electrical distributors, dominate the list of distributors ranked by sales-per-employee. The companies here were among the 93 respondents that provided both a 2022 sales number and an employee count for publication in this year's listing. They had an average sales-per-employee figure of \$1,299,786, which is down -19% from the 2022 ranking's Top 25 distributors in sales-per-employee. Quite a few other distributors (both full-line and specialists) would have been in this Top 25 list but they requested that their sales data be used confidentially. The average sales-per-employee for the 84 respondents who identified themselves as full-line electrical distributors was \$941,649, up roughly +18% from the 2022 ranking.

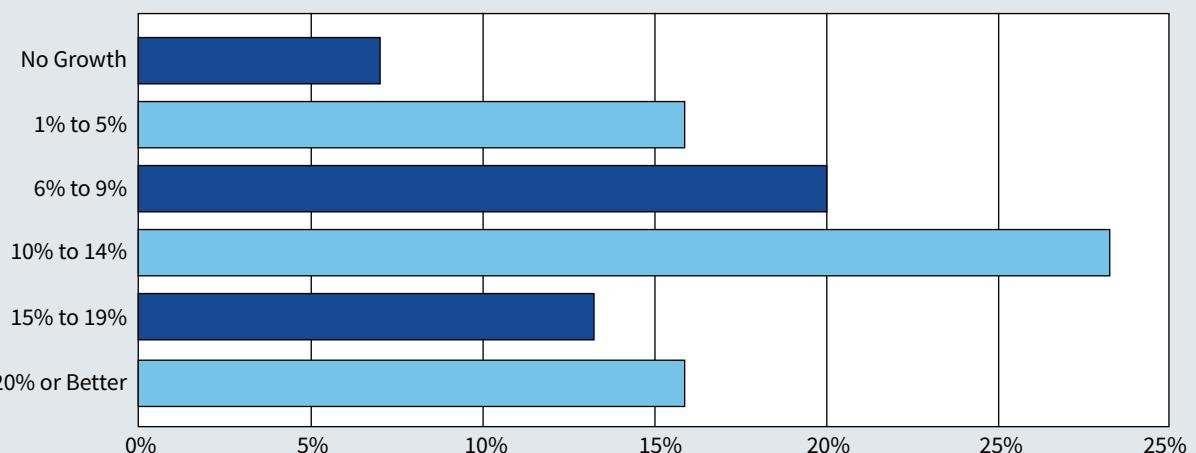
Rank	Company Name	Town/City	State	2022 Sales Per Employee
1	Tri-State Utility Products Inc.	Marietta	GA	5,628,571
2	TEC Manufacturing and Distribution Services	Georgetown	TX	5,000,000
3	Western United Electric Supply	Brighton	CO	4,814,815
4	Rural Electric Supply Cooperative (RESCO)	Middleton	WI	4,033,893
5	CEEUS Inc.	West Columbia	SC	3,560,000
6	Gresco Utility Supply Inc.	Forsyth	GA	3,172,131
7	Villa Lighting Supply Inc.	St. Louis	MO	2,914,053
8	ATI Electrical Supply	Pompano Beach	FL	2,511,063
9	General Pacific Inc.	Fairview	OR	2,193,846
10	International Electrical Sales Corp.	Miami	FL	2,048,405
11	American Electric Supply	Corona	CA	1,678,242
12	Sunrise Electric	Addison	IL	1,604,651
13	Wesco International Inc.	Pittsburgh	PA	1,449,969
14	LoneStar Electric Supply	Houston	TX	1,433,333
15	Shepherd Electric Supply	Baltimore	MD	1,293,135
16	Jackson Electric Supply	Jacksonville	FL	1,178,772
17	Jo-Kell Inc.	Chesapeake	VA	1,172,000
18	Dominion Electric	Arlington	VA	1,168,750
19	Graybar	St. Louis	MO	1,117,021
20	Bell Electrical Supply	Santa Clara	CA	1,115,385
21	Facility Solutions Group	Austin	TX	1,104,132
22	F.D. Lawrence Electric Co., The	Cincinnati	OH	1,086,139
23	Edges Electrical Group	San Jose	CA	1,071,429
24	Border States	Fargo	ND	1,045,872
25	Benfield Electric Supply Co. Inc	Mount Vernon	NY	1,034,351

2022-2023 ELECTRICAL DISTRIBUTOR ACQUISITIONS

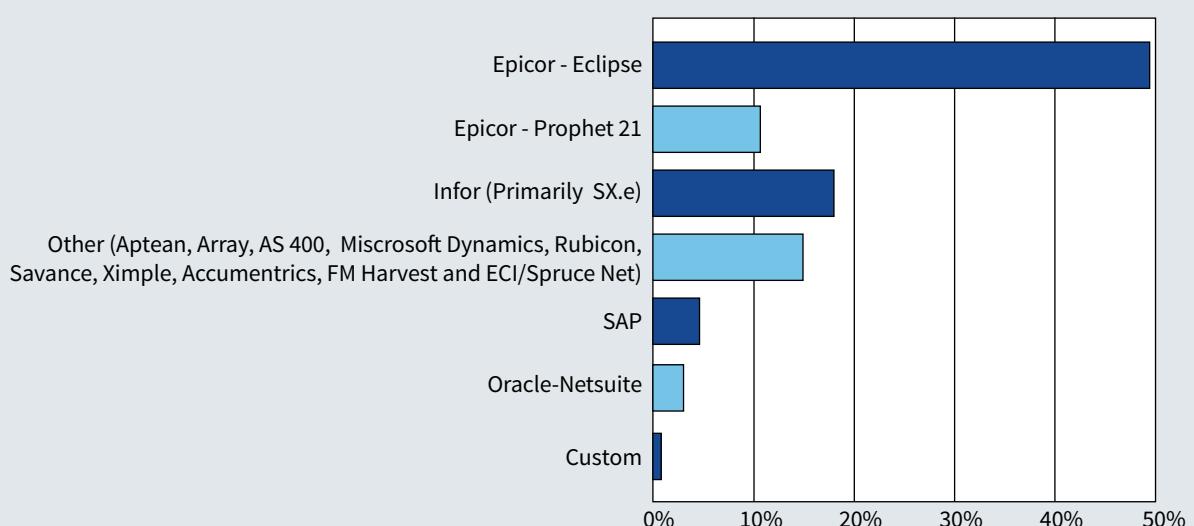
Company	Location	Acquirer	Location	Year
Valin Corp.	San Jose, CA	Graybar Electric Co.	St. Louis, MO	2023
Republic	Peoria, IL	Greycliff Partners	New York, NY	2023
Teche Electric #	Lafayette, LA	Rexel	Dallas, TX	2023
Buckles-Smith #	Santa Clara, CA	Rexel	Dallas, TX	2023
Butler's Electric Supply	Wilmington, NC	Sonepar North America/ Capital Electric	Charleston, SC	2023
Alliantz	Narbonne, France	Sonepar SA	Paris, France	2023
LED Supply Co.	Denver, CO	Applied UV	New York, NY	2022
Advance Electric Supply Co. #	Chicago, IL	Border States	Fargo, ND	2022
Phyl-Mar Electrical Supply	Santa Clarita, CA	City Electric Supply	Dallas, TX	2022
Amperage Electrical Supply #	Roselle, IL	Consolidated Electrical Distributors (CED)	Irving, TX	2022
Lowe Electric Supply #	Macon, GA	Crescent Electric Supply	East Dubuque, IL	2022
Lyons Electrical Supply	Dayton, OH	Dickman Supply Inc.	Sidney, OH	2022
Phosco Electric Supply	Mulberry, FL	Electric Supply Inc.	Tampa, FL	2022
Kansas City Electrical Supply #	Kansas City, MO	Elliott Electric Supply	Nacogdoches, TX	2022
West-Lite Supply	Cerritos, CA	Facility Solution Group (FSG)	Austin, TX	2022
Capital Architectural Signs	Austin, TX	Facility Solution Group (FSG)	Austin, TX	2022
FM Supply	Waterloo, ON	Gerrie Electric Wholesale	Burlington, ON	2022
CX Connexion #	Buffalo Grove, IL	Graybar Electric Co.	St. Louis, MO	2022
Walker Industrial Products	Newtown, CT	Graybar Electric Co.	St. Louis, MO	2022
New England Drives & Controls	Southington, CT	Graybar Electric Co.	St. Louis, MO	2022
Scott Electric Supply NY locations	Fredonia & Depew, NY	Green Mountain Electric Supply	Colchester, VT	2022
Davis Electric Supply	Buffalo, NY	Green Mountain Electric Supply	Colchester, VT	2022
Generation Electric Supply & Lighting	Liverpool, NY	Green Mountain Electric Supply	Colchester, VT	2022
Falcone Electric Supply	Batavia, NY	Green Mountain Electric Supply	Colchester, VT	2022
Williams Electric Supply	Nashville, TN	Inline Electric Supply	Huntsville, AL	2022
Wire Supplies Inc.	Indianapolis, IN	Kirby Risk Electrical Supply	Lafayette, IN	2022
Bay Wire	Hayward, CA	OmniCable (Dot Family Holdings)	West Chester, PA	2022
Valley Electric Supply	Glenwood Springs, CO	Rexel USA	Dallas, TX	2022
Horizon Solutions #	Rochester, NY	Rexel USA	Dallas, TX	2022
YESCO Electrical Supply #	Columbiana, OH	Schaedler YESCO Distribution Inc.	Harrisburg, PA	2022
Aztec Electrical Supply	Concord, OH	Sonepar North America	North Charleston, SC	2022
Rockingham Electrical Supply Co. #	Newington, NH	Sonepar North America	North Charleston, SC	2022
Professional Electrical Products Co. (PEPCO) #	Eastlake, OH	Sonepar North America	North Charleston, SC	2022
Advance Electrical & Industrial	Norcross, GA	Sonepar North America	North Charleston, SC	2022
NEDCO Supply #	Las Vegas, NV	Sonepar North America/Codale	North Charleston, SC	2022
HOLT Electrical Supply	St. Louis, MO	Sonepar North America/ Springfield Electric Supply	North Charleston, SC	2022
Broadway Electric Supply (BESCO)	Woodbury, NJ	Warshauer Electric Supply	Tinton Falls, NJ	2022
Rahi Systems Holdings	Fremont, CA	WESCO International Inc.	Pittsburgh, PA	2022
Advanced Electrical Supply & Distribution	North Little Rock, AR	Wholesale Electric Supply	Texarkana, TX	2022
First SOURCE Electrical #	Houston, TX	Winsupply Inc.	Dayton, OH	2022
Williams Wholesale Supply	Nashville, TN	Winsupply Inc.	Dayton, OH	2022

Note: # Top 150 Electrical Distributors

TOP 150 DISTRIBUTORS 2023 GROWTH EXPECTATIONS



TOP 150 DISTRIBUTORS ERP SYSTEMS



Pratt said his top concern in 2023 is the switchgear industry's slow recovery to improve lead time and lack of availability for common SKUs.

Larry Swink, president, Jackson Electric Supply, Jacksonville, FL, said that while his company had its second-best year in 2022, it was a decrease from 2021. "The largest impact was the delays in the switchgear market resulting in 52 week-plus lead-times. The backlog carried over from these orders would have been another +35% in revenue with typical 12-week to 16-week lead times." Swink expects sales to increase +20% in 2023.

Lead times were a challenge for K/E Electric Supply, Mount Clemens, MI, said Rock Kuchenmeister, CEO and president. "Vendor improvements in fulfillment during the second half of 2022 allowed K/E Electric to begin the process of shrinking our customer backlog. However, customer expectations quickly recovered (from Covid levels) and the company backlog has actually grown to unprecedented levels." He is forecasting a +14% increase in K/E Electric's 2023 sales.

Other major concerns included the impact of remote officing on demand for new office construction and/or office

retrofit work; price increases; the impact of the regional banking instability on the commercial real estate market; and rising interest rates.

Methodology. In April of this year, *EW*'s editors sent out a survey to several hundred distributors. We had a great response this year, and more than 100 electrical distributors provided sales revenue for their companies. We supplemented this data with publicly available revenue and company information for hybrid distributors including Fastenal, MSC Industrial Direct, Motion Industries, Ferguson, Johnson

WHAT'S NEW WITH THE TOP 150 ELECTRICAL DISTRIBUTORS?

MAJOR ANNIVERSARY MILESTONES

Dakota Supply Group, Plymouth, MN, is celebrating a major anniversary this year – it's now 125-years-old. **French Germen**, one of the founding companies of **Agilix Solutions**, St. Louis, and **Fromm Electric Supply**, Reading, PA, also became members of the Century Club this year and are now 100 years old.

Another new member of the Century Club, **Turtle & Hughes**, Linden, NJ, celebrated its 100th anniversary with the launch of its new brand mission: "Rethinking Energy. Advancing Tomorrow." Said Molly Sheehan, ESG business analyst, "This is more than a new logo, it's a go-to-market strategy with three new brand values: Commitment to Our Industry & Communities; Diversity & Innovation by Design; and Radical Collaboration. And this summer, we are moving our headquarters to Clark, NJ. It will be an employee and customer experience center that will focus on collaboration and innovation."

Cardello Lighting & Electric Supply, Pittsburgh, is now 75 years old; State Electric Supply, Huntington, WV, celebrated its 70th anniversary last year, and **IEWC**, New Berlin, WI, celebrated its 60th anniversary with a record sales year. **Toole & Rose Supply**, Carrollton, KY, celebrated its 35th anniversary; Nassau National Cable, Great Neck, NY, is now 10 years old; **TEC Manufacturing & Distribution Services**, Georgetown, TX, turned 20 years old; and **Atlantic Coast Electric Supply**, Summerville, SC, celebrated its fifth year in business by taking 200 customers on its inaugural customer incentive trip to Nashville, TN.

Along with celebrating its seventh year in business, **Lon-eStar Electric Supply**, Houston, became a member of the IMARK buying/marketing group and started a single-line partnership with ABB in Texas. The company also recently opened a branch in west Texas to service the Midland-Odessa region and the Permian region, the nation's largest oil basin.

At **Erin Enterprises**, Boynton Beach, FL, Tom Heffernan celebrated 63 years in the electrical wholesaling industry – 53 of those years as president of the two companies he founded.

NEW FACILITIES & CAPITAL EXPENDITURES

Schaedler YESCO Distribution, Harrisburg, PA, made several big investments and one large acquisition over the past two years. The company acquired YESCO Electrical Supply Inc., Columbiana, OH, to expand in eastern Ohio; plans to open a 90,000-sq-ft regional distribution center near Pittsburgh in 3Q 2023; opened a relocated branch in Allentown, PA; and began using its 40,000-sq-ft expanded central distribution center addition.

Inline Electric Supply Co., Huntsville, AL, is also investing in its infrastructure and will soon be opening a distribution facility that will house a centralized inventory/project warehouse storage and wire cutting and handling facility.

In Michigan, **K/E Electric Supply Corp.** opened a branch in Ann Arbor, MI; recently invested in a major software upgrade; and is in the design phase of a new corporate headquarters.

Bell Electric Supply, Santa Clara, CA, also has some new digs, and recently moved into a new 68,000-sq-ft building in Santa Clara.

ATI Electrical Supply, Pompano Beach, FL, expanded its Florida operations to include stocking products sold over the counter and increasing its inventory of hard-to-get products, and **CEEUS Inc.**, West Columbia, SC, purchased a larger warehouse and announced expansion into other states.

ERP INVESTMENTS

Larry Swink, president of **Jackson Electric Supply**, Jacksonville, FL, said 2022 was a big year for his company. "We transitioned our accounting and ERP system to Epicor/Eclipse," he wrote in his response. "This had a big impact on our processes, but a positive one. Not only have we improved our visibility and accuracy, we bridged the gap between finance, sales and operations. Our team is working with a better understanding of the total process from closing the order to the final results on the P&L."

Hunt Electric Supply Co., Burlington, NC, is working on a new web site and is implemented bar code scanners for receiving and pulling orders; **Mars Electric**, Mayfield Village, OH, launched a new e-commerce platform; and **Chelsea Lighting**, New York, implemented a new Accumatica ERP system and named a new CEO – Mike Toolis. In other news on the digital commerce front, **G&G Electric Supply**, New York, will be launching an online platform by the end of Q2 2023.

EXECUTIVE CHANGES

Facility Solutions Group (FSG), Austin, TX, appointed new chief operating officers of all its divisions: (Lighting, Electrical, and Electrical Service), and a added chief marketing officer, chief sales officer, chief product officer and chief revenue officer. "This was a huge organizational change and shift, that will help take FSG past \$1 billion in sales by centralizing our focus and effort of our business," said Leon Mowadia, chief operating officer- Lighting & Distribution.

In Colorado, Trevor Blazer, son of Mike Blazer, co-owner of **Blazer Electric Supply**, Colorado Springs, CO, was named general manager.

THE WORLD'S TWO LARGEST ELECTRICAL DISTRIBUTORS

Company Name	City	2020 Revenues	Employees	Branches	Countries
Sonepar SA	Paris, France	34,752,240,000	44,000	2,400	4
Rexel SA	Paris, France	20,057,620,000	26,504	1,936	21
TOTAL		54,809,860,000	70,504	4,336	

In 2022, the two largest distributors in the world had an estimated 70,504 employees working in 4,906 branches. In total, Sonepar and Rexel had combined sales of approximately \$54.8 billion. (Sales converted to Euros using the 12/31/22 exchange rate.)

THE FIVE LARGEST FULL-LINE ELECTRICAL DISTRIBUTORS IN NORTH AMERICA

Company Name:	Town/City	State/Province	2022 Revenue	Employees	Locations
WESCO Distribution Inc. (WESCO International)	Pittsburgh	PA	18,849,600,000	13,000	621
Sonepar North America	Charleston	SC	14,047,000,000	NA	566
Graybar Electric Co.	St. Louis	MO	10,500,000,000	9,400	325
Rexel Holdings USA (Rexel SA)	Dallas	TX	8,466,568,100	9,223	645
Consolidated Electrical Distributors (CED)	Irving	TX	NA	6,000	700

In 2022, the five largest full-line distributors in North America had an estimated \$56.7 billion in combined revenue and operated an estimated 2,857 branches in North America. According to *Electrical Wholesaling*'s sales data, these five companies accounted for no less than 40% of an estimated \$143.8 billion in combined U.S. and Canadian sales.

Supply and W.W. Grainger, to present a robust ranking of the industry's largest distributors. While some readers may question including these companies in

the Top 150, they are key channels to the market for many manufacturers and the billions in electrical product sales cannot be ignored.

Many of these companies asked us to use their sales data confidentially and only for placement on the listing. Over the past three years, we have had

MEGA-CONSTRUCTION PROJECTS TOP 150 DISTRIBUTORS ARE WORKING ON

Although the construction market is showing some signs of slowing down, Top 150 distributors are busy. They are working on a diverse array of trophy jobs, and several executives still see some big projects on the horizon, including the electrical work associated with the 2028 Los Angeles Olympics and the potential transit tunnel under the Hudson River between New York and New Jersey. While data center work dominated past Top 150 reports on mega-projects, as you will see in the list below, distributors are involved with a broad variety of large jobs. Here are some of them:

- Air Force Academy Visitors Center in Colorado Springs, CO
- Battery manufacturing plants in Kansas, Michigan and Ohio
- Intel semiconductor plant in New Albany, OH
- Port in Charleston, SC
- Sparks Therapeutics gene therapy facility in Philadelphia
- Cleveland Clinic Neurology project in Cleveland
- Cleveland Browns Stadium
- Facebook, Google and Yahoo data centers in Iowa

- FBI projects in Huntsville, AL
- First Solar new facility
- Georgia Power grid modernization
- Indiana University Health hospital in Indianapolis
- JFK Airport in New York
- JP Morgan Chase Tower in New York
- Netflix production campus and headquarters, Fort Monmouth, NJ
- Lionsgate Studios, Newark, NJ
- NGA West facility being built by National Geospatial Agency in St. Louis
- NUCOR Steel expansion projects in Kentucky
- Pittsburgh International Airport
- FNB Tower in Pittsburgh
- University of Pittsburgh housing and labs
- Brookhaven National Labs new "ring" particle accelerator in Upton, NY
- LAX Airport in Los Angeles
- University of Cincinnati classroom and office construction



Courtesy of Netflix

Facility Solution Group expects Netflix's plans to redevelop the Fort Monmouth, NJ, campus into a major film studio to provide business in the coming years. According to a Netflix press release, the first phase of the project will include the construction of 12 soundstages that will range in size from 15,000 sq ft to 40,000 sq ft each with a maximum buildout of 480,000 sq ft. Additional and ancillary improvements may include office space, production services buildings, mill space and studio backlots.



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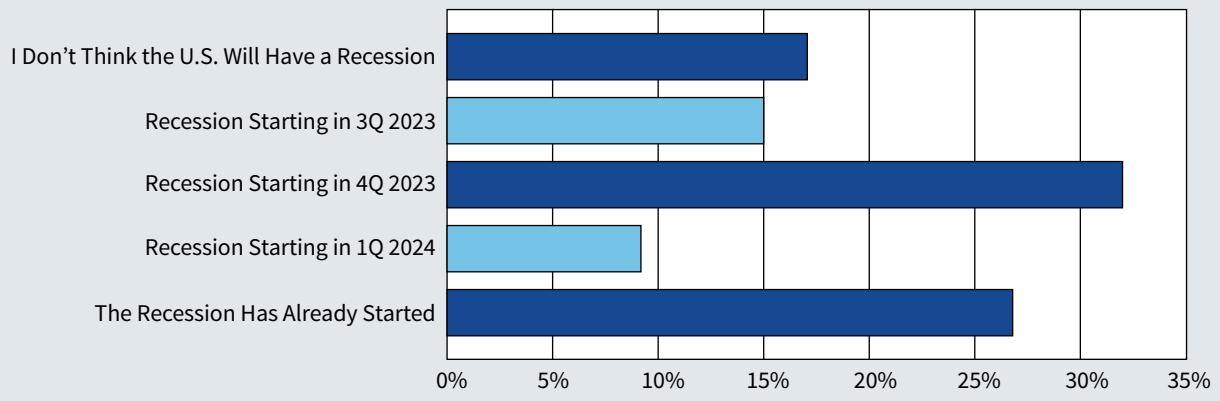
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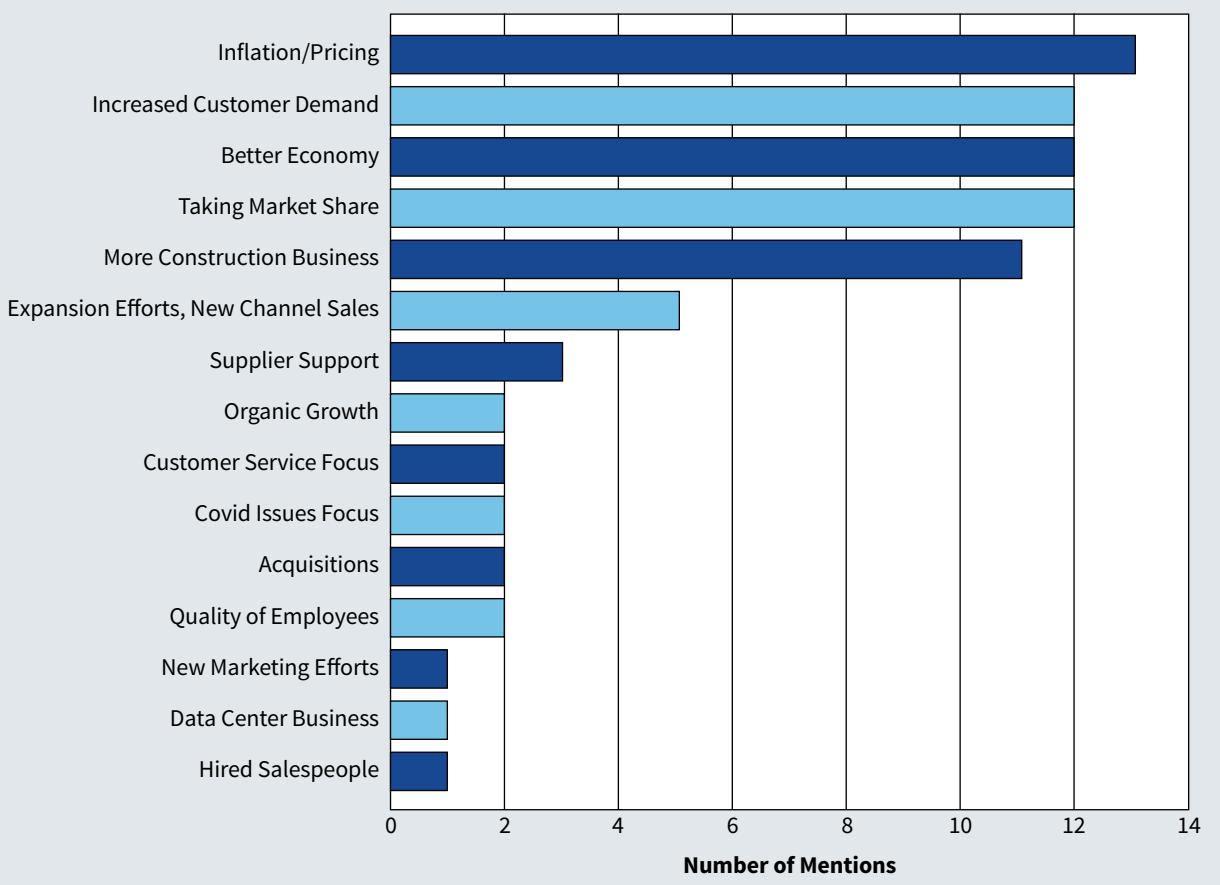


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TOP 150 DISTRIBUTOR TAKE ON A RECESSION IN THE U.S. ECONOMY



BIGGEST REASONS FOR INCREASE IN 2022 REVENUES

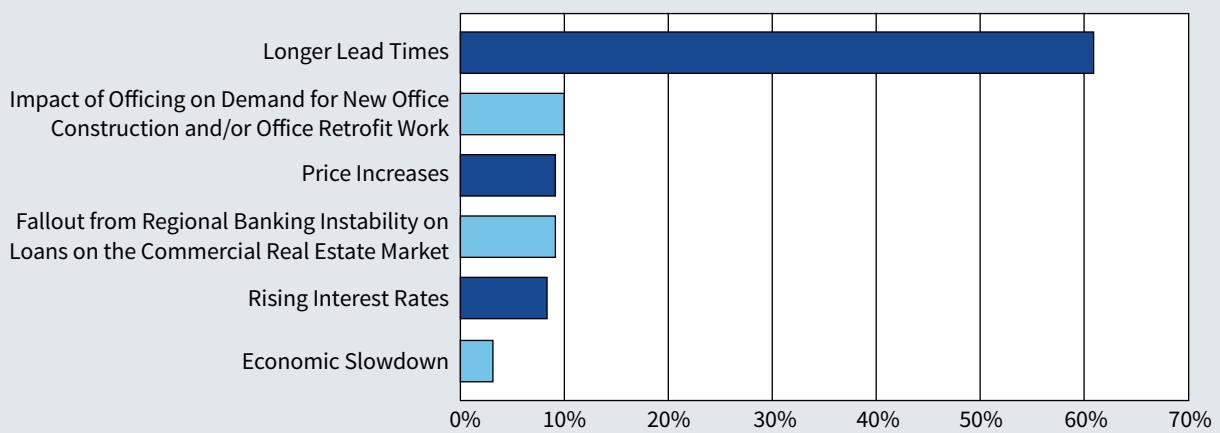


more distributors ask us to use their sales data confidentially, so when you see a "NA" (Not Available) for 2022 revenues, that most often means we have the data but are not releasing it publicly.

In those situations where a distributor is large enough to make the listing but did not respond to our surveys, if we have

reliable sales or employee data from the past two years, we will place them on the listing using a sales-per-employee average developed each from the respondents who provided both revenue and employee data. For this year's ranking, the 82 full-line electrical distributors had an average sales-per-employee figure of \$941,649. We also placed some distributors that did not provide

TOP 150 DISTRIBUTORS ON 2023'S TOP BUSINESS CHALLENGES



data on the list with sales or employee data from Mergent Online.

The impact of M&As on EW's annual ranking of the industry's

largest distributors. EW tracks industry M&A activity closely and has a database of the 600-plus acquisitions. Since 2020, about 30 distributors

formerly ranked on the Top 150/Top 200 have been acquired, reducing the "pool" of sizeable companies to include in the list.

The acquisitions of so many distributors is why we only rank 150 distributors instead of 200 companies, as we had done for well over a

decade. Despite the smaller list, the 150 distributors in this year's ranking have tremendous clout in the market. They have an estimated \$97.7 billion in 2022 revenues and operate more than 9,871 locations. We estimate that these companies account for 68% of the industry's total sales. **EW**

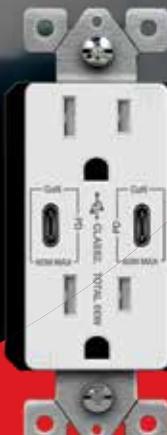
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THE TOP 150 ELECTRICAL DISTRIBUTORS

Rank	Company Name	Town/City	State/Province	2022 Sales	Employees	Locations	Senior Executive
1	Wesco International Inc.	Pittsburgh	PA	18,849,600,000*	13,000	621*	John Engel
2	Sonepar North America	Charleston	SC	14,047,000,000*	NA	566*	Rob Taylor
3	Graybar	St. Louis	MO	10,500,000,000	9,400	325	Kathleen Mazzarella
4	Rexel Holdings (Rexel USA)	Dallas	TX	8,466,568,100*	9,223*	645*	Brad Paulsen
5	Consolidated Electrical Distributors (CED)	Irving	TX	NA	6,000	700	Kurt Lasher
6	City Electric Supply	Dallas	TX	NA	4,707*	668*	Thomas Hartland Mackie
7	Border States	Fargo	ND	2,850,000,000	2,725	104	David White
8	Elliott Electric Supply Inc.	Nacogdoches	TX	2,067,000,000	2,650	171	Bill Elliott
9	U.S. Electrical Services	Middletown	CT	NA	2,000	150	Randy Eddy
10	McNaughton-McKay Electric Co.	Madison Heights	MI	NA	NA	65	Mark Borin
11	Crescent Electric Supply	East Dubuque	IL	NA	2,000	155	Kristi Dahlke
12	OmniCable	West Chester	PA	NA	712*	21*	Greg Lampert
13	Kendall Electric Inc. (The Kendall Group)	Portage	MI	NA	1,250	72	John Harman
14	W.W. Grainger Inc.	Lake Forest	IL	1,109,250,000	26,000*	246	Donald Macpherson
15	Van Meter Inc.	Cedar Rapids	IA	NA	810	25	Lura McBride
16	Main Electric Supply Co.	Santa Ana	CA	NA	641	15	R. Scott Germann
17	Gresco Utility Supply Inc.	Forsyth	GA	774,000,000	244	7	Steve Gramling
18	Wholesale Electric Supply	Texarkana	TX	698,753,248	736	69	Buddy McCulloch
19	Dakota Supply Group	Plymouth	MN	NA	966	53	Paul Kennedy
20	State Electric Supply	Huntington	WV	NA	680	41	John Spoor
21	Summit Electric Supply	Albuquerque	NM	NA	620	25**	Ed Gerber
22	Turtle & Hughes	Linden	NJ	NA	905**	30**	Stephen Kleynhans
23	Dealers Electrical Supply	Waco	TX	NA	632	55	Scott Bracey
24	IEWC	New Berlin	WI	NA	69**	24**	Mike Veum
25	Scott Electric	Greensburg	PA	NA	610	15	Larry Shirey
26	LoneStar Electric Supply	Houston	TX	559,000,000	390	7	Jeff Metzler
27	Franklin Empire	Mount-Royal	QU	NA	545	23	B. Backman & C. Backman
28	Kirby Risk Electrical Supply	Lafayette	IN	NA	552	40	James K. Risk, III
29	Motion Industries	Birmingham	AL	NA	9,100**	549*	Randy Breaux
30	Wholesale Electric Supply of Houston	Houston	TX	NA	479	12	Greg Hall
31	TEC Manufacturing and Distribution Services	Georgetown	TX	445,000,000	89	40	Johnny Andrews
32	Winsupply Inc.	Dayton	OH	NA	NA	75	Richard Schwartz
33	Echo Group Inc. (Echo Electric Supply)	Council Bluffs	IA	NA	500	21	Mitch Lane
34	Shepherd Electric Supply	Baltimore	MD	429,320,832	332	5	Stuart Vogel
35	Werner Electric Supply Co.	Appleton	WI	NA	470	11	Craig Wiedemeier
36	Colonial Electric Supply	King of Prussia	PA	NA	NA	17	Steve Bellwoar
37	Villa Lighting Supply Inc.	St. Louis	MO	387,569,000	133	2	Jack Villa
38	Gerrie Electric Wholesale	Burlington	ON	NA	400	24	Elaine Gerrie

* North America ** Global # Acquired in 2023 ## Acquired in 2022

THE TOP 150 ELECTRICAL DISTRIBUTORS

Rank	Company Name	Town/City	State/Province	2022 Sales	Employees	Locations	Senior Executive
39	Green Mountain Electric Supply	Colchester	VT	NA	400	26	Nate Laber
40	Dominion Electric	Arlington	VA	374,000,000	320	11	Stephen Krooth
41	Edges Electrical Group	San Jose	CA	360,000,000	336	12	Chester C. Lehmann III
42	Rural Electric Supply Cooperative (RESCO)	Middleton	WI	302,542,000	75	7	Matt Brandrup
43	Ferguson plc	Newport News	VA	NA	33,000	1,509	Kevin Murphy
44	Fastenal	Winona	MN	297,066,000	22,386	1,538*	Daniel Florness
45	Granite City Electric	Quincy	MA	NA	314	30	Steve Helle
46	Inline Electric Supply Co.	Huntsville	AL	295,000,000	350	20	Bruce Summerville
47	Schaedler Yesco Distribution Inc.	Harrisburg	PA	293,517,742	409	22	Greg Schaedler
48	United Electric Supply	Wilmington	DE	290,000,000	326	14	George Vorwick
49	Loeb Electric	Columbus	OH	NA	325	4	Charles Loeb
50	Agilix Solutions	St. Louis	MO	NA	375	13	Mike Stanfill
51	Standard Electric Co.	Saginaw	MI	NA	300	17	Bill Gray
52	Billows Electric Supply Co.	Delran	NJ	NA	285	19	Jeff Billow
53	CEEUS Inc.	West Columbia	SC	267,000,000	75	1	E. Chad Capps
54	Western United Electric Supply	Brighton	CO	260,000,000	54	4	Greg Mordini
55	Professional Electrical Products Co. (PEPCO) #	Eastlake	OH	NA	NA	7	Joe Borkey
56	Electrical Equipment Co.	Raleigh	NC	NA	241	12	Mark Holmes
57	Alameda Electrical Distributors	Hayward	CA	226,000,000	290	15	Craig LaRue
58	O'Neil Electric	Woodbridge	ON	221,000,000	135	3	Jayne Millard
59	Steiner Electric	Elk Grove Village	IL	NA	NA	6	Rick Kerman & John Burke
60	Brownstown Electric Supply	Brownstown	IN	NA	145	5	Gregg Deck
61	Parrish-Hare Electric Supply	Irving	TX	NA	212	4	Pat Hare
62	Tri-State Utility Products Inc.	Marietta	GA	197,000,000	35	3	Rusty Batch
63	Butler Supply Inc.	St Louis	MO	NA	250	27	Deborah Kuempel
64	Facility Solutions Group	Austin	TX	176,661,095	160	30	William Graham
65	CBT Co.	Cincinnati	OH	176,300,000	265	3	James (Jay) Stahl, Jr.
66	Johnstone Supply Inc.	Portland	OR	NA	NA	450	Lane Devin
67	Horizon Solutions ##	Rochester	NY	NA	NA	12	John Kerkhove
68	Mars Electric	Mayfield Village	OH	NA	200	11	Michael Doris
69	Electric Supply Inc. (Supply Chain Equity Partners)	Tampa	FL	NA	170	8	Harry Irwin
70	American Electric Supply	Corona	CA	159,433,031	95	1	Mike Pratt
71	MSC Industrial Direct	Melville	NY	NA	6,000	50	Erik Gershwind
72	Standard Electric Supply Co.	Milwaukee	WI	154,000,000	203	16	Larry Stern
73	Staniion Wholesale Electric Co. Inc.	Pratt	KS	146,919,079	225	17	William Keller
74	Lowe Electric Supply ##	Macon	GA	NA	NA	13	Jim Kinman
75	General Pacific Inc.	Fairview	OR	142,600,000	65	3	Rick Hall
76	Buckles-Smith #	Santa Clara	CA	NA	NA	6	Art Cook

* North America ** Global # Acquired in 2023 ## Acquired in 2022

THE TOP 150 ELECTRICAL DISTRIBUTORS

Rank	Company Name	Town/City	State/Province	2022 Sales	Employees	Locations	Senior Executive
77	Sunrise Electric	Addison	IL	138,000,000	86	1	Don Chriske
78	Regency Lighting	Chatsworth	CA	136,000,000	172	5	Evan Regenstreif
79	Benfield Electric Supply Co. Inc	Mount Vernon	NY	135,500,000**	131**	18**	Daniel J. McLaughlin
80	Independent Electric Supply	Billerica	MA	NA	120	8	Dan Gray
81	Denney Electric	Ambler	PA	NA	136	9	Steve Thornton
82	NEDCO Supply ##	Las Vegas	NV	NA	NA	1	Marc Winard
83	Broken Arrow Electric Supply Inc.	Broken Arrow	OK	122,167,036	157	10	Bruce Garner
84	CX Connexion ##	Buffalo Grove	IL	NA	NA	2	David Rosenstein
85	Jo-Kell Inc.	Chesapeake	VA	117,200,000	100	5	Suzy Kelly
86	Warshauer Electric Supply Co. Inc.	Tinton Falls	NJ	115,350,000	187	5	James Warshauer
87	J.H. Larson Company (Pahl's Designer Showrooms)	Plymouth	MN	NA	177	8	Lisa Fox
88	Sequel Electrical Supply	Meridian	MS	NA	121	10	Juan Ramon
89	Cayce Mill Supply	Hopkinsville	KY	NA	116	6	Bart Cayce
90	Dickman Supply	Sidney	OH	NA	100	5	Tim Geise
91	F.D. Lawrence Electric Co., The	Cincinnati	OH	109,700,000	101	3	Tink O'Leary
92	Dulles Electric Supply Corp.	Sterling	VA	NA	109	2	John J. Hughes, III
93	Amperage Electrical Supply ##	Roselle	IL	NA	NA	1	Vito Pelagio
94	Advance Electric Supply Co. ##	Chicago	IL	NA	NA	1	Aaron Hughes
95	Chelsea Lighting	New York	NY	NA	75	4	Mike Toolis
96	Rockingham Electrical Supply Co. ##	Newington	NH	NA	NA	10	Jim Pender
97	ParamontEO Inc.	Woodridge	IL	NA	115	3	Ken Gallagher
98	Electrical Supply Center	Burlington	MA	NA	NA	6	Larry LaFreniere
99	Peninsular Electric Distributors	West Palm Beach	FL	94,000,000	95	2	John Larmoyeur
100	Blazer Electric Supply	Colorado Springs	CO	88,000,000	115	2	Steve Blazer
101	Metro Wire & Cable Corp.	Sterling Heights	MI	NA	43	3	Devin Ezop
102	First SOURCE Electrical ##	Houston	TX	NA	NA	1	Phil deLoache
103	Raymond de Steiger Inc.	Sterling Heights	MI	NA	80	4	Peter de Steiger
104	Fromm Electric	Reading	PA	74,500,000	100	8	Mike Fromm
105	K/E Electric Supply Corp.	Mount Clemens	MI	NA	75	4	Rock Kuchenmeister
106	Central Supply Co.	Indianapolis	IN	NA	NA	6	Ted Ashcraft
107	Schwing Electrical Supply Corp.	Farmingdale	NY	NA	106	6	Peter Schwing
108	Atlantic Coast Electric Supply	Summerville	SC	NA	66	6	John Marshall
109	Service Electric Supply Inc.	Romulus	MI	NA	55	2	Eric Braidwood
110	Eckart Supply	Corydon	IN	NA	72	9	Phillip Bennett
111	Medler Electric Co.	Alma	MI	NA	120	13	Bill Michael
112	Crum Electric Supply Co. Inc.	Casper	WY	63,241,028	90	10	David M. Crum
113	Gordon Electric Supply	Kankakee	IL	NA	68	4	Cara Gordon Potter

* North America ** Global # Acquired in 2023 ## Acquired in 2022

THE TOP 150 ELECTRICAL DISTRIBUTORS

Rank	Company Name	Town/City	State/Province	2022 Sales	Employees	Locations	Senior Executive
114	Hunt Electric Supply Co.	Burlington	NC	58,562,582	77	8	Sam Hunt IV
115	Bell Electrical Supply	Santa Clara	CA	58,000,000	52	1	David Wallen
116	Hein Electric Supply	West Allis	WI	NA	80	9	Ron Kohlenberg
117	Voss Lighting	Lincoln	NE	NA	170	14	Mike Voss
118	Swift Electrical Supply Co.	Teterboro	NJ	52,878,412	80	4	August Sodora Jr.
119	Gallant & Wein	Long Island City	NY	NA	55	3	Stuart Gruman
120	Nassau National Cable	Great Neck	NY	NA	33**	3	Karelyls Mattos
121	Loyd's Electric Supply	Branson	MO	NA	NA	3	Phillip Loyd
122	Idlewood Electric, Supply Inc.	Highland Park	IL	NA	102	3	Barbara Lansing
123	International Electrical Sales Corp. (IESCO)	Miami	FL	49,161,709	24	1	Michael Bernstein
124	G&G Electric Supply	New York	NY	48,919,049	59	3	Laurence Heimrath
125	Desert Hills Electric Supply Inc.	Artesia	NM	NA	59	4	Jason Bolin
126	E. Sam Jones Distributor Inc.	Atlanta	GA	NA	102	6	Griffin Jones
127	F&M Electric Supply Co Inc.	Danbury	CT	NA	48	4	Fil Cerminara
128	YESCO Electrical Supply ##	Columbiana	OH	NA	NA	5	James DeRosa
129	Kansas City Electrical Supply ##	Kansas City	MO	NA	NA	2	Kaylin Crain
130	Jackson Electric Supply	Jacksonville	FL	42,435,801	36**	1	Larry Swink
131	Coburn Supply Co.	Beaumont	TX	NA	NA	69	Patrick Maloney
132	ATI Electrical Supply	Pompano Beach	FL	40,177,000	16	2	Greg Knowles
133	B&K - Power to Solve	City of Industry	CA	NA	40	4	Todd Brown
134	Teche Electric Supply #	Lafayette	LA	NA	NA	4	David Frazer
135	Y&B Lighting & Electric Supply	Brooklyn	NY	NA	35	1	Yoel Braver
136	Gross Electric	Toledo	OH	NA	85	4	Laurie Gross
137	Desert Electric Supply	Palm Desert	CA	NA	51	4	Eric Stevens
138	Kandel Brothers Electrical Supplies	Middletown	NY	NA	20	1	Gregg Kandel
139	HESCO	Rocky Hill	CT	NA	51	2	Bill DePasquale
140	United Utility Supply Cooperative	Louisville	KY	NA	29	5	Chris Perry
141	Candela Corp.	Huntington Beach	CA	27,000,000	40	2	James Baas
142	Mission Controls & Automation	San Antonio	TX	27,000,000	35	1	David Gardner
143	D&S Electrical Supply Co	Pocatello	ID	NA	25	2	Andrew Akers
144	West Virginia Electric Supply	Huntington	WV	NA	70	8	Jared Colker
145	Mid-West Lighting	Los Angeles	CA	24,200,000	28	1	David Frandzel
146	Johnson Electric Supply Co., The	Cincinnati	OH	NA	38	2	Douglas Johnson
147	Cardello Lighting & Electric Supply (LibertyWay Farm)	Pittsburgh	PA	NA	59	8	Matthew Cardello
148	Toole & Rose Supply Inc	Carrollton	KY	NA	17	1	Bryan L Rose
149	Wholesale Supply Group Inc.	Cleveland	TN	NA	200	32	Jeff Rogers
150	Erin Electrical Enterprises Inc.	Boynton Beach	FL	NA	13**	1	Tom Heffernan

* North America ** Global # Acquired in 2023 ## Acquired in 2022

ALPHABETICAL GUIDE TO THE TOP 150 ELECTRICAL DISTRIBUTORS

Rank	Company Name	Town/City	State/Prov	Rank	Company Name	Town/City	State/Prov
94	Advance Electric Supply Co.	Chicago	IL	40	Dominion Electric	Arlington	VA
50	Agilix Solutions	St. Louis	MO	92	Dulles Electric Supply Corp.	Sterling	VA
57	Alameda Electrical Distributors	Hayward	CA	126	E. Sam Jones Distributor Inc.	Atlanta	GA
70	American Electric Supply	Corona	CA	33	Echo Group Inc. (Echo Electric Supply)	Council Bluffs	IA
93	Amperage Electrical Supply	Roselle	IL	110	Eckart Supply	Corydon	IN
132	ATI Electrical Supply	Pompano Beach	FL	41	Edges Electrical Group	San Jose	CA
108	Atlantic Coast Electric Supply	Summerville	SC	69	Electric Supply Inc. (Supply Chain Equity Partners)	Tampa	FL
133	B&K - Power to Solve	City of Industry	CA	56	Electrical Equipment Co.	Raleigh	NC
115	Bell Electrical Supply	Santa Clara	CA	98	Electrical Supply Center	Burlington	MA
79	Benfield Electric Supply Co. Inc.	Mount Vernon	NY	8	Elliott Electric Supply Inc.	Nacogdoches	TX
52	Billows Electric Supply Co.	Delran	NJ	150	Erin Electrical Enterprises Inc.	Boynton Beach	FL
100	Blazer Electric Supply	Colorado Springs	CO	127	F&M Electric Supply Co Inc	Danbury	CT
7	Border States	Fargo	ND	91	F.D. Lawrence Electric Co., The	Cincinnati	OH
83	Broken Arrow Electric Supply Inc.	Broken Arrow	OK	64	Facility Solutions Group	Austin	TX
60	Brownstown Electric Supply	Brownstown	IN	44	Fastenal	Winona	MN
76	Buckles-Smith	Santa Clara	CA	43	Ferguson plc	Newport News	VA
63	Butler Supply Inc.	St Louis	MO	102	First SOURCE Electrical	Houston	TX
141	Candela Corp.	Huntington Beach	CA	27	Franklin Empire	Mount-Royal	QU
147	Cardello Lighting & Electric Supply (Liberty Way Farm)	Pittsburgh	PA	104	Fromm Electric	Reading	PA
89	Cayce Mill Supply	Hopkinsville	KY	124	G&G Electric Supply	New York	NY
65	CBT Co.	Cincinnati	OH	119	Gallant & Wein	Long Island City	NY
53	CEEUS Inc.	West Columbia	SC	75	General Pacific Inc.	Fairview	OR
106	Central Supply Co.	Indianapolis	IN	38	Gerrie Electric Wholesale	Burlington	ON
95	Chelsea Lighting	New York	NY	113	Gordon Electric Supply	Kankakee	IL
6	City Electric Supply	Dallas	TX	45	Granite City Electric	Quincy	MA
131	Coburn Supply Co.	Beaumont	TX	3	Graybar	St. Louis	MO
36	Colonial Electric Supply	King of Prussia	PA	39	Green Mountain Electric Supply	Colchester	VT
5	Consolidated Electrical Distributors (CED)	Irving	TX	17	Gresco Utility Supply Inc.	Forsyth	GA
11	Crescent Electric Supply	East Dubuque	IL	136	Gross Electric	Toledo	OH
112	Crum Electric Supply Co. Inc.	Casper	WY	116	Hein Electric Supply	West Allis	WI
84	CX Connexion	Buffalo Grove	IL	139	HESCO	Rocky Hill	CT
143	D&S Electrical Supply Co.	Pocatello	ID	67	Horizon Solutions	Rochester	NY
19	Dakota Supply Group	Plymouth	MN	114	Hunt Electric Supply Co.	Burlington	NC
23	Dealers Electrical Supply	Waco	TX	122	Idlewood Electric, Supply Inc.	Highland Park	IL
81	Denney Electric	Ambler	PA	24	IEWC	New Berlin	WI
137	Desert Electric Supply	Palm Desert	CA	80	Independent Electric Supply	Billerica	MA
125	Desert Hills Electric Supply Inc.	Artesia	NM	46	Inline Electric Supply Co.	Huntsville	AL
90	Dickman Supply	Sidney	OH	123	International Electrical Sales Corp. (IESCO)	Miami	FL

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Rank	Company Name	Town/City	State/Prov	Rank	Company Name	Town/City	State/Prov
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130	Jackson Electric Supply	Jacksonville	FL	25	Scott Electric	Greensburg	PA
146	Johnson Electric Supply Co., The	Cincinnati	OH	88	Sequel Electrical Supply	Meridian	MS
66	Johnstone Supply Inc	Portland	OR	109	Service Electric Supply Inc	Romulus	MI
85	Jo-Kell Inc.	Chesapeake	VA	34	Shepherd Electric Supply	Baltimore	MD
105	K/E Electric Supply Corp.	Mount Clemens	MI	2	Sonepar North America	Charleston	SC
138	Kandel Brothers Electrical Supplies	Middletown	NY	51	Standard Electric Co.	Saginaw	MI
129	Kansas City Electrical Supply	Kansas City	MO	72	Standard Electric Supply Co.	Milwaukee	WI
13	Kendall Electric Inc. (The Kendall Group)	Portage	MI	73	Staniion Wholesale Electric Co. Inc.	Pratt	KS
28	Kirby Risk Electrical Supply	Lafayette	IN	20	State Electric Supply	Huntington	WV
49	Loeb Electric	Columbus	OH	59	Steiner Electric	Elk Grove Village	IL
26	LoneStar Electric Supply	Houston	TX	21	Summit Electric Supply	Albuquerque	NM
74	Lowe Electric Supply	Macon	GA	77	Sunrise Electric	Addison	IL
121	Loyd's Electric Supply	Branson	MO	118	Swift Electrical Supply Co.	Teterboro	NJ
16	Main Electric Supply Co.	Santa Ana	CA	31	TEC Manufacturing and Distribution Services	Georgetown	TX
68	Mars Electric	Mayfield Village	OH	134	Teche Electric Supply	Lafayette	LA
10	McNaughton-McKay Electric Co.	Madison Heights	MI	148	Toole & Rose Supply Inc	Carrollton	KY
111	Medler Electric Co.	Alma	MI	62	Tri-State Utility Products Inc.	Marietta	GA
101	Metro Wire & Cable Corp.	Sterling Heights	MI	22	Turtle & Hughes	Linden	NJ
145	Mid-West Lighting	Los Angeles	CA	9	U.S. Electrical Services	Middletown	CT
142	Mission Controls & Automation	San Antonio	TX	48	United Electric Supply	Wilmington	DE
29	Motion Industries	Birmingham	AL	140	United Utility Supply Cooperative	Louisville	KY
71	MSC Industrial Direct	Melville	NY	15	Van Meter Inc.	Cedar Rapids	IA
120	Nassau National Cable	Great Neck	NY	37	Villa Lighting Supply Inc.	St. Louis	MO
82	NEDCO Supply	Las Vegas	NV	117	Voss Lighting	Lincoln	NE
12	OmniCable	West Chester	PA	14	W.W. Grainger Inc.	Lake Forest	IL
58	O'Neil Electric	Woodbridge	ON	86	Warshauer Electric Supply Co. Inc.	Tinton Falls	NJ
97	ParamonTEC Inc.	Woodridge	IL	35	Werner Electric Supply Co.	Appleton	WI
61	Parrish-Hare Electric Supply	Irving	TX	1	Wesco International Inc.	Pittsburgh	PA
99	Peninsular Electric Distributors	West Palm Beach	FL	144	West Virginia Electric Supply	Huntington	WV
55	Professional Electrical Products Co. (PEPCO)	Eastlake	OH	54	Western United Electric Supply	Brighton	CO
103	Raymond de Steiger Inc.	Sterling Heights	MI	18	Wholesale Electric Supply	Texarkana	TX
78	Regency Lighting	Chatsworth	CA	30	Wholesale Electric Supply of Houston	Houston	TX
4	Rexel Holdings (Rexel USA)	Dallas	TX	149	Wholesale Supply Group Inc.	Cleveland	TN
96	Rockingham Electrical Supply Co.	Newington	NH	32	Winsupply Inc.	Dayton	OH
42	Rural Electric Supply Cooperative (RESCO)	Middleton	WI	135	Y&B Lighting & Electric Supply	Brooklyn	NY
47	Schaedler Yesco Distribution Inc.	Harrisburg	PA	128	YESCO Electrical Supply	Columbiana	OH



Photo courtesy of Amazon

Amazon Web Services has invested \$15 billion in its cloud computing cluster in Oregon, which has become the primary West Coast deployment zone for the AWS cloud platform, according to a post at www.datacenterfrontier.com.

Commercial Market 101

Here are five major trends reshaping the commercial construction market. Part 2 of 2 parts.

In Part 1 of EW's Commercial Market 101 update, we covered some of the key indicators that measure the economic health of the market. In this article, EW's editors will cover the key trends shaping the commercial market.

1. Telecommunicating is reshaping the commercial real estate market and it will dramatically impact the amount of new office construction and the configuration of existing office space.

Although the COVID-19 pandemic accelerated the move toward work-at-home and hybrid officing options, the trend toward telecommunication has been underway for some time. While the percent of a company's work force working from home varies by industry and the region of the country, it's not unusual in some cities for 50% or less

of a company's employees to work from home or to only come into the office one or two days a week.

In a post on its website (<https://info.pcxcorp.com/blog/how-the-rise-of-remote-workers-are-impacting-the-construction-industry>) PCX Holding, a division of Hubbell Industrial Control that designs and manufactures prefabricated electrical power distribution systems, outlined the challenges and opportunities telecommuting presents the commercial construction market.

"As telecommuting becomes more popular, the construction industry is going to have to adapt," the post said. "Having a big office in a high rise doesn't have the appeal it once did, and more corporations are going to seek ways to economize on their office space. Office space will be redesigned to accommodate more communal work spaces and fewer offices and cubicles. There will be less emphasis on large urban headquarters

and more emphasis on smaller offices with coworking space. Smaller offices will help companies reduce their carbon footprint as well.

"You also can expect to see other construction industry trends emerge. Fewer commuters means that less parking will be required. It also will encourage companies to locate offices where property is less expensive and where they receive greater tax incentives."

2. Renovation work may account for a bigger share of the commercial market.

The need for new office configurations to adapt to hybrid work strategies will contribute to the growing importance of renovation work in the commercial market. Back in January, Kermit Baker, AIA's chief economist, wrote in his 2023 Consensus of Construction, "Over the past few decades, there has been a steady increase in the share of revenue

By Jim Lucy, Editor-in-Chief

at architecture firms coming from reconstruction projects — renovations, retrofits, building additions, and historic preservation. Part of this derives from an expanding interest in sustainability — fixing up an older building is more environmentally sensitive than tearing that building down and constructing a new one. However, fundamental economics and demographics likely play an equal or greater role. Slower population growth in recent years and the resulting slower growth in the economy means that we don't need to expand our building stock at the pace we did a decade or two ago.

"We're seeing this increased growth in the reconstruction share across all major building categories. Architecture firms reported that in 2021, 62% of their revenue from commercial and industrial facilities came from reconstruction projects, up from 38% 15 years ago."

It's tough to get hard numbers on exactly how big the commercial retrofit market can be for electrical distributors and their customers. But no one will dispute that it's sizeable and that it can often be more profitable than new construction work because it usually doesn't go out to bid. According to *Electrical Wholesaling* reader surveys, commercial/office maintenance supplies and commercial/office retrofit business account for approximately 9% of the average distributor's sales, while new office construction is 9.5% of sales. One of the biggest sources of commercial retrofit work is energy-efficient lighting systems. The inherent cost savings of the more efficient LED lighting systems blended with utility rebates and federal, state or local tax incentives can often push the return on investment (ROI) for energy-efficient lighting systems to three years or less.

3. Data centers are still the hottest segment of the commercial construction market.

Amazon, Microsoft, Google, Facebook and other tech firms or social media companies are each spending hundreds of millions of dollars on data centers. The total construction value of many data centers can easily range between \$500 million and \$1 billion, and when you consider that the electrical portion of these

jobs is typically no less than 10%, these jobs represent a nice chunk of change for electrical distributors.

WESCO Distribution, Pittsburgh, and its Anixter business unit focus on helping customers solve supply chain issues related to data center projects. The company bolstered its package of data center solutions with the Sept. 2022 acquisition of Rahi System Holdings, Fremont, CA, which according to the press release on the purchase "serves the full life cycle of data center solutions by helping customers manage and simplify technology."

4. Distributors are differentiating themselves by offering preassembled products and systems to electrical contractors.

To help their contractor customers save time and labor, some electrical distributors are offering presassembled electrical products as a value-added service. Graybar Electric Co., St. Louis, and Rexel USA, Dallas, are two distributors with innovative preassembly services.

Graybar urges contractors to "always be installing" so they can focus on the most profitable portion of any job — using their time and expertise on the job-site to install products, and not on non-productive tasks like having highly paid electricians working on

time-consuming tasks like assembling fixture whips' installing fittings into steel boxes; or assembling enclosures. A promotional video on Graybar's website says electrical contractor spend up to up to 40% of their time working on nonproductive tasks, which impacts project profitability.

Rexel also focuses on project profitability with its preassembly services, which it provides for electrical, lighting, solar, automation & control and voice-data-video products. One of its promotional flyers for this service says, "We'll handle the labor; you reap the savings. On the jobsite, time is money. You need to keep your high-valued labor focused on the most important tasks. With Rexel's PreFab services, we deliver pre-assembled components built to your specifications right to your jobsite. We do all the work while you save time and labor cost on repetitive installation. You get consistent quality at a lower cost."

5. Some savvy electrical distributors are going the extra mile to help out electrical contractors with their job-site logistical challenges.

Large commercial projects are often in downtown high-rise buildings or on large corporate campuses, and electrical contractors can waste a lot of time when



The trend toward telecommuting has forced many companies to renovate their existing space to accommodate new office needs.

LARGE CONSTRUCTION PROJECTS UNDERWAY OR IN PLANNING STAGES 1Q 2023

Contract Value (\$ Millions)	Project	City/State	Project Type	Status	Source
4200	JFK Airport's Terminal 6	New York, NY	Airport	Feb. 2023 groundbreaking	businesstravelerusa.com
1400	Concourse D expansion at Atlanta's Hartsfield Jackson Airport	Atlanta, GA	Airport	Broke ground Feb. 2023	www.construction.com
1300	Sacramento Airport Expansion	Sacramento, CA	Airport	Plans announced Feb. 2023	www.enr.com
332	BWI Airport expansion	Baltimore, MD	Airport	Construction expected to start late 2022	www.cbsnews.com
150	Spokane International Airport expansion	Spokane, WA	Airport	Underway 2022-2023	www.spokesman.com
127	Fresno Yosemite International Airport Expansion	Fresno, CA	Airport	Federal grant money announced March 2023	www.gvwire.com
110	Gerald R. Ford International Airport expansion	Grand Rapids, MI	Airport	Underway 2023	www.mlive.com
126	Oklahoma Fairgrounds Coliseum	Oklahoma City, OK	Arena	Feb. 2023 groundbreaking	www.news9.com
185	Hollywood Casino	Joliet, IL	Casino	Plans announced Dec. 2022	www.construction.com
160	Smith County Courthouse	Tyler, TX	Courthouse	Plans announced Dec. 2022	www.construction.com
1000	Two \$500 million segments of Facebook data center	Sandston, VA	Data center	Plans announced Dec. 2022	www.construction.com
1000	Prime Data Center campus	Elk Grove Village, IL	Data center	Jan. 2023 groundbreaking	www.construction.com
515	Amazon data center	Hilliard, OH	Data center	Jan. 2023 groundbreaking	www.construction.com
500	Vantage data Center	Sterling, VA	Data center	Entered planning stage Dec. 23	www.construction.com
325	Westfield Data Center	Westfield, MA	Data center	Entered planning stage Jan. 23	www.construction.com
275	Illinois District Data Center	Chicago, IL	Data center	Entered planning stage Jan. 23	www.construction.com
NA	90MW data center built on former site of U.S. Gypsum Corp. plant	Fremont, CA	Data Center	Plans announced Feb. 2023	www.bisnow.com
NA	NE Edge proposed 1.5-million-sq-ft data center campus at Millstone Nuclear Power Station	Waterford, CT	Data center	Plans announced Feb. 2023	datacenterdynamics.com
NA	Lux Living 200-room hotel & 300-apartment building in downtown Kansas City	Kansas City, MO	Hotel/ Multi-family	Plans announced Feb. 2023	www.bizjournals.com
300	Great Wolf Lodge at Foxwoods Casino	Ledyard, CT	Hotel/Resort	Feb. 2023 groundbreaking	www.cbia.com
213	Center of Innovation laboratory	Emeryville, CA	Laboratory	Plans announced Feb. 2023	www.construction.com
185	Life sciences building	Philadelphia, PA	Life sciences	Entered planning stage Dec. 23	www.construction.com
3000	RXR's Veridea mixed-use project	Apex, NC	Mixed-use	Feb. 2023 project update	www.newsobserver.com
3000	The Mix mixed-used development	Frisco, TX	Mixed-use	Dec. 2022 groundbreaking	constructiondive.com

the products they need for a project aren't exactly where they need them. In an Oct. 2019 cover story on Lonestar Electric Supply Houston, the company's management team told *EW* about how the value-added service they developed to keep their customers' lighting jobs on track.

The company's executive team said logistical element of a typical lighting job is often complicated by some unique shipping challenges. Lighting fixtures are often shipped by manufacturers on a part-by-part basis in dozens of different

boxes, and electrical contractors must assign someone on the job-site — often at hefty wage rates that can hit \$50 per hour in the Texas market — to unpack the boxes, inspect for damages and piece together the fixtures.

Lonestar Electric Supply developed a customized cloud-based system to track fixture shipments that offers real-time mobile access for both employees and customers, and an innovative logistical support system where it brings these shipments into a special logistics

warehouse and a crew inspects all products for damage, labels all shipping boxes with special job and location codes, and then holds the products for the job until the contractor needs them on the job site.

Summary. Although the commercial construction market may face economic headwinds over the next year, it will remain a key market for electrical distributors, contractors, manufacturers and independent manufacturers' reps.

Look for the Industrial 101 article in *EW*'s July/August issue. **EW**

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By Benj Cohen

AI-Powered Sales

A former cowboy boots salesperson at a billion-dollar distributor used AI-powered software to learn how to sell to customers and quickly generate sales.

I have a new definition of retail therapy for you. And it's a true story a distributor shared with me.

Like many of you, this distributor was under pressure. His top sales reps were eyeing retirement. His company faced a tough talent market and increasing customer expectations. And even though they were short-staffed, that was no excuse not to hit sales numbers.

Amid the chaos in his mind, this distributor went shopping for a new pair of cowboy boots. He had an extraordinary experience because the young salesperson who helped him was fantastic. The salesperson was passionate about his work and had a great personality.

The distributor began to wonder if this cowboy boot salesperson could be

successful as a sales rep for his billion-dollar distribution company. His immediate thought was, "Of course not. He's a boot salesperson with zero experience in distribution." Then others warned the distributor that the cowboy boot salesperson would fail.

But his gut told him it just might work. The rep is young, with a great personality and drive to be successful. This distributor gave the cowboy boot salesperson a chance because he had an AI-powered sales tool to elevate his performance and get him up to speed in a day. Once hired, the former cowboy boots salesperson went out to the field with an AI-powered mobile app sales tool. With customer information readily available in the palm of his hand, he anticipated customers'





Baby Boomers will have reached ages 60-78 by 2024, and 13 million will be 65 or older. Even if some are extending their working years, the pandemic motivated many to retire.

Along with large numbers of the workforce expected to retire, other issues compound the sales labor shortage. Voluntary turnover is nearly three times higher for sales organizations, with one report finding a 30% average turnover rate for B2B sales organizations. The Great Resignation continues with 66% of employees seeking their next professional move for more work/life balance and higher job satisfaction.

And when they move on to the next thing, whether it's retirement or a new position, it's difficult for distributors to fill the void. Even when you're successful in the recruiting and hiring process, like the cowboy-boot-shopping distributor from our story above, it can still take more than 60 days for a B2B sales rep to begin to make an impact.

It takes time and resources to train new sales reps. And when decades of product expertise and knowledge walks out the door when a top sales rep retires after a long career, distributors need a way to quickly recoup the loss and get new sales reps onboard and proficient immediately.

Distributors need to lean on technology and AI to increase a sales rep's time to value considerably.

needs and had knowledgeable conversations that converted to sales. The quick success of the cowboy salesman was made possible with AI technology.

SALES AI EMPOWERS THE NEXT GENERATION OF OUTSIDE SALES REPS

What if 20% of your experienced sales reps were to retire in the next five years? This isn't a what-if scenario for many distributors. It's their reality.

THRIVING IN THE NEW MARKET WITH AI-POWERED SALES TOOLS

It's no longer a winning strategy for distributors to increase sales by hiring more reps. Even though that's been a tried-and-true strategy for years, it's just too expensive. Distributors must do more with less. A sales tool powered by artificial intelligence (AI) can help outside sales reps increase productivity and accomplish these three key objectives:

1 Ramp new sales reps quickly. With sales insights from AI, new sales reps don't need extensive industry or product knowledge to become immediately successful. They only need to follow the AI's recommendations for who to call and what to talk about when. If a customer is due to reorder, AI knows it. If a product is out of stock, it can suggest a substitution. With an AI-powered sales tool, sales reps have a cheat sheet to success and even new sales reps can operate like seasoned experts.

2 Prioritize accounts with actionable insights. With AI, sales reps don't waste time planning and can spend more time selling. AI analyzes data from every sales channel in the organization for a 360° view of each customer. It can determine the biggest revenue opportunity or

ABOUT THE AUTHOR

Benj Cohen grew up in his family's distribution business, Benco Dental, a dental supply business started by his great-grandfather in the 1930s. He blended this background with a Harvard degree in applied math to found proton.ai (www.proton.ai), a company dedicated to bringing artificial intelligence to distribution companies and others in the B2B world to deliver large ROI. Cohen was the subject of a 2019 *Electrical Wholesaling* feature on AI, "The Art & Science of Artificial Intelligence." You can contact him at benjamin.cohen@proton.ai.



churn risks so a sales rep can prioritize accounts to visit.

3. Identify upsell and cross-sell opportunities to grow wallet share.

Sales reps don't need years of experience with your product catalog when they have an AI-powered

sales tool at their fingertips. The tool gives sales reps a comprehensive view of everything they need to sell, including product insights such as inventory, pricing and substitutes for stock-outs. By highlighting categories where a customer is under-spending, AI-powered sales tools give sales reps sales plays to unlock more revenues.

4. Automate quote follow-ups. Manually tracking quotes and follow-ups isn't efficient. An AI-powered sales tool can automate many tasks, such as quote follow-ups, alleviating the burden of administrative tasks for your sales reps. Freeing your sales reps from manual data entry leaves them more time to sell.

LOOKING FORWARD: EMBRACING TECHNOLOGY TO DO MORE WITH LESS

With the right technology supporting your sales reps, you can think outside the box when recruiting and hiring sales reps. That's exactly what distributors must do in a tough talent market. When you embrace technology to increase sales reps' time to productivity, you can do more with less. The next time you encounter a salesperson with the personality and drive you like but with no distribution sales experience, go ahead and give them a chance if you have the technology to support them. **EW**

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

American Lighting (Denver): **Jennifer Kirkpatrick** was appointed director of sales and will be responsible for planning, implementing, managing and overseeing the company's overall sales strategy for lighting showrooms, Proluxe and Prizm Lighting. She has spent the last 10 years working at American Lighting developing multiple sales channels throughout the organization and has been involved in project management, product development, marketing, rep management and developing strategies for ongoing sales growth.



Kirkpatrick

Gross Electric (Toledo, OH): The American Lighting Association's Women in Lighting Committee has announced that **Laurie Gross**, president of Gross Electric and current chair of the ALA Board of Governors, will be the 2023 recipient of the Women in Lighting Leadership Award.

Known as a champion for the independent showroom channel, Gross has advocated for equitable business practices to enable brick-and-mortar retailers to compete in the industry's changing landscape. She has also exhibited leadership on behalf of women in the industry, appointing women to head up both Gross Electric's lighting showroom division and electrical supply division.

Sonepar USA (North Charleston, SC): **Reina Ohol** has been promoted from VP of Human Resources, Sonepar Canada, to Senior VP of Human Resources, Sonepar North America. She has more than over 20 years of HR experience and worked for companies in Australia, India and Canada in the hospitality, steel trading, healthcare and food industries. She joined Sonepar Canada in Jan. 2019.



Ohol

Gillian Gurney is Ohol's successor as VP of Human Resources, Sonepar Canada. She previously worked for Canadian Tire, CGI, Sofina Foods and most recently Wild Fork Canada.

Motion Industries, (Birmingham, AL): **Patrick Cummings** was promoted to senior VP and CFO. He joined Motion in 2012 as executive VP of Corporate Compliance. Since then, he held the position of U.S. controller from 2014-2019, before becoming VP of Financial Planning &

Analysis. He was also asked to serve as interim CFO after Greg Cook, Motion's previous CFO, moved to the U.S. Automotive Group at Genuine Parts Company (GPC).

Crawford Electric Supply/Sonepar (Houston): **Chastity DeVito** joined the company as Houston sales leader and member of the branch's management team. DeVito is an electrical distribution veteran with more than 20 years of hands-on experience in sales development and leadership. As sales leader, DeVito develops and executes plans that identify and service key customers with an emphasis on profitable growth.

Allied Moulded Products (Bryan, OH): **Cathy Goodrich** has been promoted to regional sales manager for Residential Division – Western U.S. Region. She joined Allied Moulded in 2014 and brings over 12 years of sales experience in the residential and industrial non-metallic box industry. Goodrich is replacing Ron Robinson, who is now the national sales manager for Allied Moulded Products' Residential Division.



Goodrich

Legrand North America (West Hartford, CT): **Sarah Levine** is now the company's director of Circular Economy. She comes to Legrand with experience in sustainable business practices working for Apple, Mattel and Boeing. At Legrand, she will be responsible for developing and implementing strategies that will help Legrand to reduce waste and maximize the lifespan of products.

Legrand believes this hire will continue to help the company further pursue the milestones laid out in its CSR (corporate social responsibility) roadmap. Legrand has set an ambitious goal to achieve a 15% recycled plastics use rate and a 40% recycled metals use rate in products manufactured by 2024, in addition to eliminating 100% of single-use plastic in flow packs and expanding polystyrene packaging.

Orbit Industries (Bell Gardens, CA): **Aaron Salazar** was promoted to regional sales manager. In this new role, he will be responsible for managing the sales territory of Bob Jones & Associates (Arizona, southern Nevada and the Inland Empire, CA). Before Orbit, Salazar worked at CED, where he held roles such as counter sales and inside sales. He also worked for Parrish-Hare from 2018 to 2019. In 2019, Salazar joined Orbit Industries as a factory sales representative.

World Electric Supply/Sonepar (Tampa, FL): The company, which operates 16 branch locations throughout Florida and Georgia, announced leadership changes across finance, supply chain and marketing.

Bill Turner has been promoted to VP of Finance. Over the past year, Turner has been instrumental in several key areas, including managing the integration process of Advance Electrical, incorporating several analytical tools to improve World's business and developing new financial processes.

Ben Austin recently joined the World Electric team as director of Supply Chain. He brings over 25 years of electrical experience in sales, projects, procurement, IT and operations. Eleven years at Sonepar, Austin most recently worked for the Sonepar USA supply chain group as the director of Project Implementation and Automation. Before joining the supply chain group, he worked as the warehouse process improvement manager for the Eclipse process improvement team at Sonepar.

Nash Welsh, promoted to strategic marketing manager, has been tasked with helping World Electric drive growth by implementing digital solutions and working closely with vendor partners to strengthen those partnerships. Prior to her role at World, Nash worked at Eaton as the Southeast territory manager for the residential and wiring devices retail division.

Arlington Industries (Scranton, PA): **Tom Gretz** was appointed president. He will assume the duties of Arlington's recently deceased, long-time president, Tom Stark. From the time he joined the company as vice president and general manager in 1987, Gretz worked with Stark in developing the many innovative, time-saving products Arlington has introduced over the past several years. He holds hundreds of patents for electrical products, and has several patents pending.

Gretz has worked in the electrical industry for more than 50 years. He began his career at Halex Co, rising through the ranks to become Vice President of Engineering and Services. He holds a bachelor's of science degree in mechanical engineering from Cleveland State University, and an MBA in business administration from Baldwin Wallace College.



Turner



Austin

REP NEWS

Lester Sales Co., Indianapolis, has converted to an Employee Stock Ownership Plan (ESOP) as of April 14. The company worked with ESOP Advisory firm, Lazear Capital Partners to create the ESOP. The company was founded in 1958 by Ernie Lester and was purchased by John Scott in 2012. Lester Sales will continue operations as usual with no changes to its services or leadership team. John Scott will continue as CEO and Rick Gill as president.

Electra Sales, Dallas, has expanded its existing relationship with Delta-Therm to now include Oklahoma. Electra Sales has been representing Delta-Therm in north Texas since 2017 and is excited to bring Delta-Therm's electric heat tracing solutions to customers in Oklahoma as well. The company began representing Delta-Therm in Oklahoma on May 1.

Delta-Therm's products include a wide range of electric heat tracing solutions, including self-regulating heating cables, power-limiting heating cables, control and monitoring systems and accessories. Their products are designed to provide reliable, efficient, and cost-effective solutions for freeze protection, temperature maintenance and snow and ice melting.

Electra Sales is a manufacturers' representative serving the electrical industry in northern Texas, Oklahoma, Arkansas, Tennessee, northern Mississippi and northwest Louisiana. The company served its customers for 45 years.

Lex Associates now represents Chalfant Manufacturing in the New York metropolitan area as well as northern New Jersey.

Classic Wire & Cable appointed **Electrical Lines** to rep Colorado, eastern Wyoming and western Nebraska.

Cembre Inc. announced that **Grissinger-Johnson Sales** is now an active manufacturers' representative agency for the company and is covering the Iowa, Minnesota, Nebraska, North Dakota, South Dakota and the northwestern Wisconsin territory.

JD Martin is now Dialight's manufacturers' representative in the Florida market. The company supports the entire Dialight portfolio — over 40,000 total fixtures and accessories which are stocked, and ready to ship in 48 hours — for their industrial applications.

JD Martin also represents Dialight in the Texas, Oklahoma, New Mexico, Colorado, Montana, Wyoming, Louisiana and Mississippi markets.

2023 ELECTRICAL SALES FORECASTS

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Electrical Marketing's estimates for total electrical sales, as well as estimates for the electrical contractor and industrial market – the two core electrical market that account for more than 75% of all electrical sales through full-line distributors.

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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 in 17 product groups

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Local Electrical Market Indicators

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For questions on *Electrical Marketing*'s new market data, contact Jim Lucy,

Electrical Marketing's Editor-in-Chief, at jlucy@endeavorb2b.com.

OTHER MARKET DATA

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 Market Indicators

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

ELECTRICAL PRICE INDEX

Having a tough time keeping up with all of the price increases for electrical products? The Electrical Price Index offers a monthly update on pricing trends for more than 20 key electrical product groups.



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