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Around the Industry

Graybar to buy NJ's Samson Electrical

Graybar, Electric, St. Louis, MO, plans to purchase New Jersey-based Samson Electrical Supply, with an expected close date in early August.

Founded in 1949, Samson Electrical Supply, South Plainfield, NJ, sells electrical equipment such as lighting solutions, power distribution equipment and MRO support for commercial, industrial, residential, institutional and utility customers. As a subsidiary of Graybar, the company will continue to operate under the Samson Electrical Supply name with the same team and suppliers.

The Samson Electrical Supply purchase marks Graybar's third acquisition in 2026. The company also acquired American Electric Supply, Corona, CA; and Broken Arrow Electric Supply, Broken Arrow, OK.

Graybar is ranked #3 in *Electrical Wholesaling's* 2026 Top 100 Distributors listing with $12.9 billion in sales.

Surge in construction product prices push PPI to big June increase

The producer price index for inputs to new nonresidential construction climbed +7.1% from June 2025 to June 2026 despite dipping -0.5% last month, according to an analysis by the Associated General Contractors of America of government data. The increase in construction input prices was roughly double the +3.5% increase in contractors' bid prices for new nonresidential buildings, suggesting contractors continue to absorb much of the increase in materials costs.

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Boise & Washington, DC MSAs Lead All Metros in YOY Estimated Sales Increases

Total estimated sales through electrical sales appear to be about even with last year through 2Q 2026, according to *EM's l*atest metro- and state-level sales estimates.

Estimated U.S. electrical sales through distributors increased +0.2% over 2Q 2025 to $154.7, according to *EM's* calculations. However, some states are doing much better than the national average (see chart on page 4). Louisiana is leading the pack with a +5% increase to roughly $2.5 billion in estimated sales, followed by Idaho (+3.7%); Nevada (+3.6%); Minnesota (+3.1%); and Missouri (+2.7%).

It's interesting to note that *Electrical Marketing* estimates that the 10 states with the largest sales volume account for roughly 51% of all products sold through electrical distributors. Those states are California, Texas, Florida New York, Ohio, Pennsylvania, North Carolina, Illinois, Michigan and Georgia.

That concentration in sales is also evident in the 100 Metropolitan Statistical Areas (MSAs) with the largest estimated sales volume (see chart on pages 3-4). At $102.7 million in estimated 2Q 2026 sales, they account for a whopping 66% of total distributor sales. The Top 10 markets grab an impressive 24.6% of total estimated sales through distributors. The major cities in those MSAs are New York, Los Angeles, Dallas, Chicago Houston, Phoenix, Washington, DC, Atlanta, Miami and Philadelphia.

The MSAs with the largest estimated YOY percent sales increases through 2Q 2026 are Baton Rouge, LA (+11.6%); St. Louis, MO (+7.2%); Charleston-North Charleston, SC (+5.6%); Omaha-Council Bluffs, NE-IA (+5.4%); and San Jose, CA (+5.2%).

Sales estimates for more than 300 MSAs are available at *www.electricalmarketing.com* to subscribers.

— Jim Lucy

Dodge Reports June Construction Monthly Declines Across Many Market Segments

Total construction starts declined -19.9% in June to a seasonally adjusted annual rate of $1.42 trillion, according to Dodge Construction Network. Nonresidential building starts fell back -9.1%; nonbuilding starts decreased -37.7%; and residential starts decreased +2.2% over the month.

On a year-to-date basis, total construction starts were up +11.1% through June. Nonresidential starts were up +6.2%; nonbuilding starts improved by +33.8%; and residential starts were down -3.5% over the same period. For the 12 months ending June 2026, total construction starts were up +10.6% from the 12 months ending June 2025. Residential starts were down -3.6%; nonresidential starts were up +4.9%; and nonbuilding starts were up +34.3%.

"After strong megaproject activity in May, construction starts came back down to earth throughout the month of June," said Sarah Martin, director of Economic Research at Dodge Construction Network, in the press release. "Residential and institutional construction remain weak, while commercial, industrial and nonbuilding construction continue to show strong year-to-date growth."

Nonresidential. Nonresidential building starts receded -9.1% in June to a seasonally adjusted annual rate of $584 billion. Commercial starts were up +1.2% over the month, driven by a -29.5% m/m (month-to-month) increase in parking garages, alongside growth in warehouses (+15% m/m) hotels (+8.1% m/m) and retail stores (+3.2% m/m). Offices and data centers, meanwhile, pulled back -3.7% m/m. Institutional starts improved +2.5% over the month, supported by an +8% m/m uptick in education and dormitory starts, as well as a +32.9% m/m gain in other institutional starts.

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100 Largest Metros for Estimated Electrical Sales Potential: 2Q 2026

Rank	Metropolitan Statistical Area, State	2Q 2026 Total Sales Estimate ($ Millions)	Total Sales $ Change	Total Sales % Change	2Q 2026 Electrical Contractors Sales	2Q 2026 Industrial Sales	2026 Estimated Employment	2026 Industrial Employment
1	New York-Newark-Jersey City, NY-NJ-PA	6,180.6	-114.2	-1.81	4,073.0	871.5	48,737	319,333
2	Los Angeles-Long Beach-Anaheim, CA	4,840.8	-124.0	-2.50	2,663.2	1,209.4	31,867	443,167
3	Dallas-Fort Worth-Arlington, TX	4,708.6	41.7	0.89	2,920.0	846.9	34,940	310,333
4	Houston-The Woodlands-Sugar Land, TX	4,397.8	134.1	3.14	2,864.6	653.7	34,277	239,533
5	Chicago-Naperville-Elgin, IL-IN-WI	3,841.4	18.1	0.47	1,960.3	1,112.8	23,456	407,767
6	Cleveland, OH	3,419.1	54.7	1.63	2,735.9	337.6	28,700	123,400
7	Phoenix-Mesa-Scottsdale, AZ	2,936.6	-25.6	-0.86	1,945.1	404.2	23,274	148,100
8	Atlanta-Sandy Springs-Roswell, GA	2,711.8	-20.5	-0.75	1,688.0	481.5	20,198	176,433
9	Washington-Arlington-Alexandria, DC-VA-MD-WV	2,514.1	3.9	0.16	1,858.9	152.4	22,243	55,833
10	Miami-Fort Lauderdale-West Palm Beach, FL	2,491.6	-27.3	-1.08	1,718.0	275.3	20,557	100,867
11	Philadelphia-Camden-Wilmington, PA-NJ-DE-MD	2,282.3	-29.9	-1.29	1,343.9	481.9	16,081	176,600
12	Boston-Cambridge-Nashua, MA-NH	2,168.9	9.7	0.45	1,292.9	442.3	15,470	162,067
13	San Francisco-Oakland-Hayward, CA	1,986.2	-44.0	-2.17	1,240.0	348.9	14,837	127,867
14	Detroit-Warren-Dearborn, MI	1,979.8	-21.3	-1.06	944.5	639.4	11,301	234,300
15	Minneapolis-St. Paul-Bloomington, MN-WI	1,955.0	67.5	3.57	1,027.0	537.0	12,289	196,767
16	Riverside-San Bernardino-Ontario, CA	1,762.4	-77.6	-4.22	1,158.1	251.8	13,858	92,267
17	Denver-Aurora-Lakewood, CO	1,727.1	-5.0	-0.29	1,208.8	172.8	14,465	63,333
18	Austin-Round Rock, TX	1,606.5	63.5	4.11	1,052.4	232.8	12,593	85,300
19	Tampa-St. Petersburg-Clearwater, FL	1,594.7	2.5	0.16	1,073.8	202.0	12,848	74,033
20	St. Louis, MO-IL	1,571.9	105.8	7.22	937.2	320.3	11,215	117,367
21	Charlotte-Concord-Gastonia, NC-SC	1,559.4	61.5	4.11	961.5	286.0	11,505	104,800
22	San Diego-Carlsbad, CA	1,547.6	-35.7	-2.25	939.8	298.3	11,245	109,300
23	Orlando-Kissimmee-Sanford, FL	1,424.8	-26.9	-1.86	995.2	144.6	11,908	53,000
24	Portland-Vancouver-Hillsboro, OR-ID	1,373.4	-84.7	-5.81	794.5	304.2	9,507	111,467
25	Baltimore-Columbia-Towson, MD	1,358.3	55.7	4.27	927.1	159.6	11,093	58,467
26	Indianapolis-Carmel-Anderson, IN	1,283.8	33.6	2.69	767.0	260.0	9,178	95,267
27	Kansas City, MO-KS	1,207.0	22.5	1.90	721.8	243.9	8,636	89,367
28	Las Vegas-Henderson-Paradise, NV	1,205.8	35.2	3.01	881.5	83.1	10,547	30,467
29	Nashville-Davidson-Murfreesboro-Franklin, TN	1,197.2	-1.5	-0.12	716.3	241.4	8,571	88,467
30	San Jose-Sunnyvale-Santa Clara, CA	1,186.3	59.1	5.24	600.4	348.6	7,185	127,733
31	Cincinnati, OH-KY-IN	1,152.1	-0.8	-0.07	586.3	335.4	7,016	122,900
32	San Antonio-New Braunfels, TX	1,131.8	-15.4	-1.34	742.4	163.0	8,883	59,733
33	Columbus, OH	1,123.9	55.4	5.19	691.3	207.8	8,272	76,133
34	Sacramento-Roseville-Arden-Arcade, CA	1,095.4	-55.7	-4.84	770.3	106.1	9,217	38,867
35	Salt Lake City, UT	1,049.2	3.7	0.36	665.3	174.1	7,960	63,800
36	Pittsburgh, PA	1,044.4	-39.0	-3.60	596.8	238.7	7,141	87,467
37	Seattle-Bellevue-Everett, WA	939.8	-18.1	-1.89	751.8	—	8,996	—
38	Milwaukee-Waukesha-West Allis, WI	896.5	12.3	1.39	421.2	296.0	5,040	108,467
39	Raleigh, NC	883.9	35.4	4.17	611.3	95.8	7,315	35,100
40	Baton Rouge, LA	869.7	90.7	11.64	608.4	87.3	7,280	32,000
41	Jacksonville, FL	854.5	-2.0	-0.24	583.1	100.5	6,977	36,833
42	Lebanon, PA	815.9	-12.6	-1.52	626.1	26.6	7,492	9,733
43	Grand Rapids-Wyoming, MI	794.2	-10.4	-1.30	333.9	301.5	3,995	110,467
44	Virginia Beach-Norfolk-Newport News, VA-NC	762.1	-13.4	-1.73	461.4	148.3	5,521	54,333
45	Louisville/Jefferson County, KY-IN	747.0	-20.9	-2.72	376.3	221.3	4,502	81,100
46	Richmond, VA	729.5	2.9	0.40	499.0	84.6	5,971	31,000
47	Providence-Warwick, RI-MA	666.7	-14.2	-2.09	361.8	171.6	4,329	62,867
48	Boise City, ID	628.1	4.4	0.71	418.3	84.2	5,005	30,867
49	Omaha-Council Bluffs, NE-IA	613.6	31.2	5.36	395.1	95.8	4,728	35,100
50	Midland, TX	597.5	-7.5	-1.23	464.6	13.4	5,560	4,900

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Rank	Metropolitan Statistical Area, State	2Q 2026 Total Sales Estimate ($ Millions)	Total Sales $ Change	Total Sales % Change	2Q 2026 Electrical Contractor Sales	2Q 2026 Industrial Sales	2026 Contractor Employment	2026 Industrial Employment
51	Oklahoma City, OK	592.6	-4.0	-0.67	379.5	94.5	4,541	34,633
52	Cape Coral-Fort Myers, FL	584.0	-20.1	-3.33	444.4	22.8	5,317	8,367
53	Tulsa, OK	580.0	9.8	1.72	318.3	145.6	3,809	53,367
54	Birmingham-Hoover, AL	559.8	-1.8	-0.32	338.6	109.3	4,052	40,033
55	Greenville-Anderson-Mauldin, SC	551.4	-3.4	-0.61	274.9	166.3	3,289	60,933
56	Newark, NJ-PA	526.0	-3.2	-0.60	420.8	—	5,035	—
57	Hartford-West Hartford-East Hartford, CT	524.2	13.8	2.71	260.4	159.0	3,116	58,267
58	North Port-Sarasota-Bradenton, FL	515.3	-4.2	-0.81	363.2	49.0	4,346	17,967
59	Provo-Orem, UT	513.8	4.0	0.78	344.4	66.7	4,121	24,433
60	Rochester, NY	498.1	12.3	2.53	266.5	131.9	3,189	48,333
61	Charleston-North Charleston, SC	482.0	25.7	5.63	291.5	94.1	3,488	34,467
62	Memphis, TN-MS-AR	480.2	0.1	0.02	278.5	105.7	3,332	38,733
63	Buffalo-Cheektowaga-Niagara Falls, NY	464.0	1.8	0.39	233.9	137.3	2,799	50,300
64	Knoxville, TN	446.6	-11.9	-2.59	237.6	119.7	2,843	43,867
65	Philadelphia, PA	445.3	-6.5	-1.43	271.6	84.6	3,250	31,000
66	Camden, NJ	441.8	-7.6	-1.69	245.5	107.9	2,938	39,533
67	Reno, NV	441.2	10.5	2.45	266.5	86.4	3,189	31,667
68	Urban Honolulu, HI	432.6	6.6	1.54	319.4	26.7	3,822	9,767
69	New Orleans-Metairie, LA	431.5	11.0	2.61	273.8	71.4	3,276	26,167
70	Wichita, KS	429.0	9.1	2.16	200.3	142.9	2,396	52,367
71	Greensboro-High Point, NC	426.6	-2.3	-0.53	210.8	130.5	2,522	47,833
72	Fresno, CA	426.3	-0.7	-0.16	264.7	76.3	3,168	27,967
73	Madison, WI	418.4	10.3	2.52	235.8	99.0	2,821	36,267
74	Des Moines-West Des Moines, IA	416.1	-4.5	-1.08	273.1	59.9	3,267	21,933
75	Albuquerque, NM	408.6	-24.0	-5.55	282.5	44.4	3,380	16,267
76	Lancaster, PA	408.2	2.9	0.72	226.0	100.6	2,704	36,867
77	Ogden-Clearfield, UT	406.6	-5.2	-1.27	235.4	89.9	2,817	32,933
78	Corpus Christi, TX	393.5	-4.4	-1.11	290.4	24.4	3,475	8,933
79	Albany-Schenectady-Troy, NY	379.1	-6.6	-1.70	229.2	74.0	2,743	27,133
80	Beaumont-Port Arthur, TX	377.2	-13.0	-3.34	243.7	58.0	2,916	21,267
81	Columbia, SC	377.1	8.5	2.30	215.5	86.2	2,578	31,600
82	Tucson, AZ	372.7	-10.3	-2.69	219.8	78.3	2,630	28,700
83	Little Rock-North Little Rock-Conway, AR	358.7	-4.1	-1.12	230.3	56.7	2,756	20,767
84	Akron, OH	349.4	13.0	3.87	179.3	100.2	2,145	36,733
85	Toledo, OH	349.0	-0.4	-0.11	166.9	112.3	1,998	41,133
86	Fayetteville-Springdale-Rogers, AR-MO	348.4	5.7	1.65	204.2	74.5	2,444	27,300
87	Worcester, MA-CT	347.4	7.4	2.16	183.2	94.7	2,193	34,700
88	Palm Bay-Melbourne-Titusville, FL	347.1	-1.5	-0.42	179.3	98.4	2,145	36,067
89	Elgin, IL	344.5	-12.6	-3.52	170.9	104.7	2,045	38,367
90	Oxnard-Thousand Oaks-Ventura, CA	328.1	-7.0	-2.10	189.0	73.4	2,262	26,900
91	Chattanooga, TN-GA	327.0	-6.1	-1.84	154.6	107.0	1,850	39,200
92	Greeley, CO	322.9	-6.4	-1.96	216.6	41.8	2,591	15,300
93	Allentown-Bethlehem-Easton, PA	321.3	-1.7	-0.53	147.0	110.0	1,759	40,300
94	Lexington-Fayette, KY	320.2	5.0	1.58	171.7	84.5	2,054	30,967
95	Fort Wayne, IN	317.9	4.4	1.41	149.9	104.4	1,794	38,267
96	Wilmington, DE-MD-NJ	306.2	-3.7	-1.21	200.6	44.3	2,401	16,233
97	Winston-Salem, NC	304.6	0.4	0.14	152.8	90.9	1,829	33,300
98	Lakeland-Winter Haven, FL	295.4	-2.7	-0.91	182.2	54.1	2,180	19,833
99	Portland-South Portland, ME	292.7	-4.0	-1.34	162.6	71.6	1,946	26,233
100	Naples-Immokalee-Marco Island, FL	291.4	-10.3	-3.41	218.4	14.7	2,613	5,400

Notes: Sales estimates developed using construction employment data from the U.S. Bureau of Labor Statistics and sales-per-employee multipliers from *Electrical Wholesaling's* Market Planning guide of $78,775 per electrical contractor employee and $2,650 per industrial employee. Electrical contractor employment estimated at 13% of construction employment, its national average over the past 20 years. These two customer groups account for 75% of estimated electrical distributor sales. EW adds in 25% to its total market estimate to account for all other business. Sales estimates from more than 300 MSAs are availabel for download at *www.electricalmarketing.com.*

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State-Level Estimated Electrical Sales Potential: 2Q 2026

Metropolitan Statistical Area	2Q 2026 Total Sales Estimate ($ Millions)	Total Sales $ Change	Total Sales % Change	2Q 2026 Electrical Contractor Sales	2Q 2026 Industrial Sales	2026 Contractor Employment	2026 Industrial Employment
UNITED STATES	**154,648.7**	**369.01**	**0.2**	**89,435.4**	**34,283.5**	**1,070,160**	**12,562,667**
ALASKA	277.9	-16.18	-5.5	192.3	30.0	2,301	11,000
ALABAMA	2,492.6	46.03	1.9	1,222.6	771.5	14,629	282,700
ARKANSAS	1,438.1	-9.64	-0.7	717.0	433.5	8,580	158,833
ARIZONA	3,692.5	-37.24	-1.0	2,428.2	525.8	29,055	192,667
CALIFORNIA	16,051.6	-210.43	-1.3	9,561.4	3,279.9	114,409	1,201,867
COLORADO	3,013.8	16.37	0.5	2,017.9	393.2	24,145	144,067
CONNECTICUT	1,397.2	21.31	1.5	697.5	420.3	8,346	154,000
DISTRICT OF COLUMBIA	196.7	7.35	3.9	154.6	2.7	1,850	1,000
DELAWARE	424.8	0.32	0.1	269.4	70.4	3,224	25,800
FLORIDA	10,319.0	-99.74	-1.0	7,090.1	1,165.1	84,838	426,933
GEORGIA	4,617.4	-33.75	-0.7	2,526.7	1,167.2	30,234	427,700
HAWAII	600.0	11.54	2.0	444.7	35.3	5,321	12,933
IOWA	1,879.8	17.15	0.9	920.2	583.6	11,011	213,867
IDAHO	1,300.0	46.53	3.7	832.9	207.0	9,967	75,867
ILLINOIS	5,210.8	60.96	1.2	2,617.6	1,551.1	31,321	568,367
INDIANA	4,109.1	-4.32	-0.1	1,876.3	1,411.0	22,451	517,033
KANSAS	1,602.0	10.73	0.7	813.0	468.6	9,728	171,700
KENTUCKY	2,105.0	-9.26	-0.4	1,006.8	677.2	12,047	248,167
LOUISIANA	2,484.9	118.99	5.0	1,597.1	390.9	19,110	143,233
MASSACHUSETTS	3,019.9	21.86	0.7	1,794.8	621.1	21,476	227,600
MARYLAND	2,643.1	24.10	0.9	1,812.2	302.3	21,684	110,767
MAINE	642.6	-3.62	-0.6	375.2	138.9	4,489	50,900
MICHIGAN	4,614.0	-59.34	-1.3	2,110.9	1,580.3	25,259	579,067
MINNESOTA	2,999.8	91.13	3.1	1,538.4	861.5	18,408	315,667
MISSOURI	3,068.9	81.96	2.7	1,698.1	757.0	20,319	277,400
MISSISSIPPI	1,187.0	-18.58	-1.5	573.6	376.0	6,864	137,767
MONTANA	575.1	7.23	1.3	404.2	55.9	4,836	20,500
NORTH CAROLINA	5,479.2	139.13	2.6	3,153.9	1,229.4	37,739	450,500
NORTH DAKOTA	481.6	-3.51	-0.7	309.6	75.7	3,705	27,733
NEBRASKA	1,248.8	25.95	2.1	731.5	267.5	8,753	98,033
NEW HAMPSHIRE	654.0	-8.96	-1.4	341.1	182.0	4,082	66,700
NEW JERSEY	3,021.6	-73.75	-2.4	1,740.5	676.8	20,826	248,000
NEW MEXICO	828.1	-17.32	-2.0	586.3	76.1	7,016	27,900
NEVADA	1,799.0	62.37	3.6	1,253.0	186.2	14,993	68,233
NEW YORK	6,567.8	-20.42	-0.3	4,174.8	1,079.4	49,955	395,533
OHIO	5,889.1	122.02	2.1	2,857.3	1,854.0	34,190	679,367
OKLAHOMA	1,716.7	20.44	1.2	994.8	378.5	11,904	138,700
OREGON	2,097.3	-39.70	-1.9	1,202.0	475.8	14,382	174,367
PENNSYLVANIA	5,402.2	-37.52	-0.7	2,809.5	1,512.2	33,618	554,133
RHODE ISLAND	434.8	-1.80	-0.4	239.4	108.4	2,864	39,733
SOUTH CAROLINA	2,612.1	46.52	1.8	1,372.2	717.5	16,419	262,933
SOUTH DAKOTA	560.2	-0.12	0.0	328.8	119.3	3,935	43,733
TENNESSEE	3,505.2	-15.46	-0.4	1,837.9	966.2	21,992	354,067
TEXAS	15,716.3	143.63	0.9	9,914.8	2,658.2	118,638	974,067
UTAH	2,460.1	14.70	0.6	1,550.7	417.4	18,555	152,933
VIRGINIA	3,172.5	-10.07	-0.3	2,463.0	75.0	29,471	27,500
VERMONT	309.3	0.79	0.3	172.4	75.0	2,063	27,500
WASHINGTON	3,871.9	-18.08	-0.5	2,355.0	742.5	28,180	272,067
WISCONSIN	3,567.3	83.34	2.4	1,618.8	1,235.1	19,370	452,567
WEST VIRGINIA	642.1	12.21	1.9	391.1	122.5	4,680	44,900
WYOMING	353.8	4.87	1.4	255.0	28.1	3,051	10,300

Notes: Notes: Sales estimates developed using construction employment data from the U.S. Bureau of Labor Statistics and revised sales-per-employee multipliers fof $83,573 per electrical contractor employee and $2,729 per industrial employee. Electrical contractor employment estimated at 13% of construction employment, its national average over the past 20 years. These two customer groups account for 75% of estimated electrical distributor sales. *EW* adds in 25% to its total market estimate to account for all other business. Sales estimates from more than 300 MSAs are availabel for download at *www.electricalmarketing.com.*

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Continued from page 1

"Although fuel prices dropped in June, they remained far higher than a year earlier," Ken Simonson, the association's chief economist, said in the press release. "In addition, steep tariffs on aluminum, steel and products containing copper have continued to push up construction costs."

The producer price index for diesel fuel, which reflects prices at the refinery or fuel terminal level, plunged +18.4% in June but nevertheless remained +65.8% higher than a year earlier. Simonson noted that fuel prices have risen again since prices for the June index were collected nearly five weeks ago.

Metals prices also remained sharply higher than a year earlier. Aluminum mill shapes prices were up +52.4% from June 2025, while copper and brass mill shapes increased +26% percent over the year. Steel mill products prices climbed +16.9% year-over-year. All three metals are subject to tariffs as high as 50%, the economist noted. Although the index is based on prices of domestic sellers, these firms have been largely matching the prices now charged on imported products, he added.

White House announces plan for tariff relief for aluminum producers

NEMA applauded the White House's aluminum tariff incentive framework and called for expansion to strengthen the nation's electrical supply chains.

National Electrical Manufacturers Association (NEMA) President and CEO Debra Phillips issued the following statement in response to President Trump's proclamation, "Further Strengthening Actions Taken to Adjust Imports of Aluminum into the United States," which directs the U.S. Department of Commerce to establish a program that empowers domestic firms to earn reduced tariff bills in return for commitments to onshore additional primary aluminum production capacity:

"Aluminum is essential for the electroindustry given its widespread use in transformers, switchgear, wire and cable and other products that connect American families, businesses and critical infrastructure to the grid.

"The actions to allow domestic aluminum producers the opportunity to earn tariff relief are a playbook that can be expanded to encourage additional investments in U.S. supply chains and ensure manufacturers can deliver the infrastructure needed to meet rapidly growing energy demand.

"Now is the time to build on this momentum. We urge the Administration to spur additional investments in U.S. smelting and manufacturing by expanding this program to include electrical steel. We also encourage the Administration to take broader action to establish manufacturing incentives for key electrical products that are essential to driving down electricity costs for consumers, powering America's continued AI leadership and U.S. reindustrialization."

Nonresidential Construction Declines MTM in June, But Maintains Healthy YTD & YOY Activity

Continued from page 1

Healthcare facilities fell back -29.9% in June. Manufacturing construction starts declined -62.9% m/m, normalizing after a surge in activity in May. On a year-to-date basis through June, nonresidential starts are up +6.2%. Commercial and industrial construction gained 17.9%, while institutional starts are down -7.3% over the same period.

For the 12 months ending June 2026, total nonresidential starts were up +4.9% compared to the 12 months ending June 2025. Commercial starts were up +28%, institutional starts decreased 6.8%, and manufacturing starts were down -22.6% over the same period.

The largest nonresidential building projects to break ground in June were the $3.6- billion Delta Forge 1 Hyperscale Data Center Campus in Boyce, LA; the $2.1-billion Sentinel Midstream Deepwater Port in Freeport, TX; and the $2-billion AWS Data Center (Phase 2) in Canton, MS.

Residential. Residential building starts fell by -2.2% in June to a seasonally adjusted annual rate of $363 billion. Single family starts fell -3.4% m/m, and multi-family starts fell -0.4% m/m. On a year-to-date basis, residential starts are down -3.5%, with single-family starts down -7.5% and multi-family starts up +3.7%.

For the 12 months ending June 2026, total residential starts fell -3.6%. Single-family starts fell -11.8% compared to the 12 months ending June 2025, and multi-family starts increased +11.8% over the same period.

The largest multi-family structures to break ground in June were the $480-million 1740 Broadway residential conversion in New York, NY; the $251-million River Commons Residential and Community Facility in Concourse, NY; and the $191-million 40 Exchange Place residential conversion in New York, NY.

Nonbuilding. Nonbuilding construction starts fell back -37.7% in June to a seasonally adjusted annual rate of $473 billion. After triple-digit gains last month, highway and bridge starts fell back -46.6% in June and utilities declined -70.3%. Meanwhile, environmental public works improved +26.3% m/m and miscellaneous nonbuilding surged +168.3% over the same period.

On a year-to-date basis through June, nonbuilding construction was up +33.8% alongside the +119.6% year-to-date growth in electric power/utilities, +17% in miscellaneous nonbuilding, and +10.8% growth in highways and bridges. Environmental public works are down -5.5% year-to-date. For the 12 months ending June 2026, total nonbuilding starts were up +34.3%. Environmental public works fell by -4.8% compared to the 12 months ending June 2025. Highway and bridge starts were up +7.8%, miscellaneous nonbuilding starts were up +36.2% and utility/gas starts increased +122.2% over the same period.

The largest nonbuilding projects to break ground in June included the $3.6-billion CTA Red Line Extension Project in Chicago, IL; the $2.4-billion Cleveland Browns Huntington Bank Field Stadium in Brook Park, OH; and the $2.1-billion Amtrak Sawtooth Bridge Replacement in Kearny, NJ.

ABB to buy British provider of flow controls & electric acuators

ABB Ltd. plans to buy Rotork plc, Bath, England, a global provider of mission-critical intelligent flow control solutions and an independent manufacturer of electric actuators in an all-cash offer of approximately $5.5 billion that would be its largest acquisition ever.

According to the press release, "ABB would benefit from an expanded automation offering, enhancing the 'sense-control-act' automation loop with intelligent field devices and software that continuously monitors and manages industrial processes for safer, more productive, and sustainable operations."

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Industry Events

Aug. 3-5, 2026
NAED Marketing Conference
Indianapolis, IN;
www.naed.org

Sept. 29-Oct. 1, 2026
IDEA E-Biz Conference
Denver, CO; IDEA;
www.idea4industry.com

Oct. 4-7, 2026
NECA Show and Conference
Las Vegas, NV; National Electrical Contractors Association;
www.necanet.org

Oct. 12-14, 2026
NAED LEAD Conference
Charlotte, NC; National Association of Electrical Distributors (NAED)
www.naed.org

Oct. 19-21, 2026
AD Electrical North American Meeting
Chula Vista, CA; Affiliated Distributors
www.nemra.org

November 10-12, 2026
NEMA Annual Meeting
St. Petersburg, FL; National Electrical Manufacturers Association
www.makeitelectric.org

January 11-13, 2027
NAED Western Conference
Phoenix, AZ, National Association of Electrical Distributors (NAED)
www.naed.org

January 31- February 3, 2027
NEMRA Annual Conference
Dallas, TX, National Electrical Manufacturers Representatives Association

April 13-15 2027
LEDucation Annual Conference
New York, NY, LEDucation
www.leducation.org

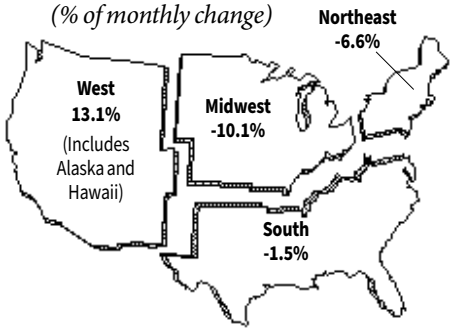
May 11-13, 2027
NAED Annual Conference
Salt Lake City, UT, National Association of Electrical Distributors (NAED)
www.naed.org

Single-Family Housing Starts Sag in June, Declining -3.2% YOY to 895,000 Pace

June housing starts in June were at a seasonally adjusted annual rate of 1,427,000, +19% above the revised May estimate of 1,199,000 and +3.5% above the June 2025 rate of 1,379,000. The U.S. Census Bureau said single-family housing starts in June were at a rate of 895,000, -0.2% below the revised May figure of 897,000.

"Builders continue to face a difficult cost environment," said Danushka Nanayakkara-Skillington, NAHB's assistant VP for forecasting and analysis, in the press release. "Higher long-term Treasury yields have kept mortgage rates elevated, while rising building material prices, transportation costs and insurance expenses are making new construction more expensive."

Housing Starts by Region
(% of monthly change)



New Privately Owned Housing Units Started

(Thousands of units, seasonally adjusted annual rate)

Period	Total	1 Unit	5 Units or more	Northeast	Midwest	South	West
June 2026[1]	1,427	895	513	57	116	523	199
May 2026[2]	1,199	897	291	61	129	531	176
April 2026[2]	1,414	914	494	52	128	560	174
Mar-26	1,522	1,017	481	64	142	559	252
Feb-26	1,346	923	414	61	144	512	206
Jan-26	1,385	894	469	47	133	506	208
Jun-26	1,379	925	430	60	154	513	198

1-Preliminary; 2-Revised; Note: Detail may not add to total because of rounding.
Source: U.S. Bureau of the Census

June EPI Annual Data Runs Hot at +6.5%

Increases in *EM's* Electrical Price Index (EPI) over June 2025 data stood out, with 13 product categories over +13% year-over-year (YOY), and eight categories sitting over the EPI Total Index's +6.5% YOY mark. Power Wire & Cable (+22.3%) and Building Wire & Cable (+15.6%) logged the biggest increases. On a monthly basis, Power Wire & Cable +1.7%); Boxes (+1.6%); and Wiring Devices & Connectors (+1.5%) were in the lead position.

Note: All EPI series represent IHS Markit aggregates of Bureau of Labor Statistics' (BLS) producer price indices (PPIs). The revised data partly reflect redefinitions of specific PPIs by the BLS, but mostly reflect the rebenchmarking of all EPI price series to a 2012 base year. The four following EPI series have been affected by BLS redefinitions: boxes, conduit (fittings), nonmetallic conduit, and generators. Sources: U.S. Bureau of Labor Statistics; S&P Global

Electrical Price Index — June 2026

2012=100	Jun. 2026	May 2026	Jun. 2025	% Change 1 Mo.	% Change 1 Yr.
Building Wire & Cable	345.8	341.3	299.2	1.3	15.6
Power Wire & Cable	383.2	376.9	313.2	1.7	22.3
Telephone	279.7	279.7	269.0	0.0	3.9
Hand & Power Tools	187.9	187.9	187.9	0.0	0.0
Elec. Heating Equip.	210.5	210.5	206.3	0.0	2.0
Residential Lighting	188.4	188.4	186.0	0.0	1.3
Industrial Fixtures	190.0	190.0	187.3	0.0	1.4
Fans & Blowers	223.6	220.5	212.9	1.4	5.0
Wiring Devices & Connectors	215.8	212.6	207.5	1.5	4.0
Pole Line Hardware	269.3	272.5	252.5	-1.2	6.6
Boxes	285.4	281.0	266.9	1.6	6.9
Conduit Fittings	242.3	240.3	233.0	0.8	4.0
Metal Conduit	293.8	289.9	280.4	1.4	4.8
Nonmetallic Conduit	255.5	253.0	243.1	1.0	5.1
Motors	233.8	234.1	216.8	-0.1	7.8
Generators	225.1	225.1	221.0	0.0	1.8
Ballasts	236.8	236.8	233.2	0.0	1.5
Elect. Meas. & Integ. Inst.	159.0	158.4	151.0	0.4	5.3
Transformers	210.2	207.7	193.2	1.2	8.8
Panelboards & Switches	274.0	274.4	261.1	-0.1	4.9
Circuit Breakers	286.3	286.3	273.8	0.0	4.6
Switchgear	322.0	322.5	294.0	-0.1	9.5
Fuses	283.9	283.9	260.4	0.0	9.0
Industrial Controls	261.5	261.5	246.3	0.0	6.1
Lamps	199.4	199.4	198.9	0.0	0.3
Appliances	141.6	141.6	142.0	0.0	-0.2
Air Conditioners	229.2	229.2	225.3	0.0	1.7
Fasteners	230.0	232.2	225.2	-0.9	2.2
Total Index	**231.5**	**230.2**	**217.4**	**0.5**	**6.5**

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June building permits slip. June building permits were at a seasonally adjusted annual rate of 1,367,000, -3% below the revised May rate of 1,410,000 and -2.3% below the June 2025 rate of 1,399,000. According to the most recent U.S. Census Bureau housing data, single-family authorizations in June were at a rate of 871,000, -2.4% below the revised May figure of 892,000.

AIA Architects' billings remain sluggish. The AIA/Deltek Architecture Billings Index (ABI) score was 47.3 points for June. Although the score improved by nearly three points from May, it remained in negative territory, indicating most firms reported a decline in billings. Inquiries increased in June after a slight decline in May and the value of newly signed design contracts was just below 50 points, meaning it was essentially flat, with nearly equal shares of firms reporting decreases and increases.

"Architecture firms remain mired in one of the longest running downturns in the 30-plus year history of the ABI, which now stretches to 41 months without a majority of firms reporting billings growth," said AIA Chief Economist, Richard Branch in the press release. "The uncertainty over the conflict in Iran along with high interest rates and significant labor shortages will continue to weigh on construction — and architect billings over the next several months."

Conference Board's U.S. leading indicators see small decline in June. The Conference Board Leading Economic Index (LEI) for the U.S. declined by -0.2% in June 2026 to 99.1 (2016=100), following a +0.1% increase in May. However, the LEI is down by only -0.3% over the first half of 2026, a much smaller rate of decline than its -1.1% contraction over the second half of 2025.

"In June, the Leading Economic Index (LEI) for the US declined and partially reversed gains registered in May and April," said Justyna Zabinska-La Monica, senior manager, Business Cycle Indicators, at The Conference Board, in the press release. "Despite the recent decline, the LEI's six- and twelve-month growth rates, while negative, were stable. Consumer spending is weakening, but strong business investment related to AI is expected to support economic activity while inflation continues to improve. The Conference Board raised its forecast from 1.8% to 1.9% y/y GDP growth for 2026."

The Marketplace : Key Figures

	Month	Latest month	Previous month	Month-over-month % change	Year ago	Year-over-year % change	2025 annual
CONSTRUCTION							
New Construction Put in Place (billions of dollars, SAAR)[2]							
Total	MAY	2210.21	2244.43	-1.5	2244.43	-1.5	2244.78
Offices	MAY	107.56	102.76	4.7	102.76	4.7	104.26
Industrial	MAY	173.62	222.47	-22.0	222.47	-22.0	214.17
Housing Starts (Thousands of units, SAAR)[2]							
Total	MAY	1199	1289	-7.0	1289	-7.0	1356
Single-unit	MAY	897	945	-5.1	945	-5.1	941
Mobile Home Shipments[3] (thousands of units, SAAR)	MAY	100	106	-5.7	106	-5.7	103
Employment, Construction Workers (thousands)[4]	MAY	8367	8326	0.5	8326	0.5	8267
Employment, Electrical Contractors (thousands)[4]	MAY	1147.2	1116.5	2.7	1116.5	2.7	1116.8
Hourly Wage, Electrical Contractors[4]	MAY	42.24	39.73	6.3	39.73	6.3	39.83
PRODUCTION							
Industrial Production Index (1967=100)[5]	MAY	102.6	101.0	1.6	101.0	1.6	101.2
Construction Supplies Production Index[5] (1977=100-SA)	MAY	101.3	99.2	2.2	99.2	2.2	99.4
Employment in Electrical Equipment & Supplies Mfg.							
Production workers (Thousands)[4]	MAY	166.8	160	4.3	160	4.3	161.4
Weekly hours	MAY	41.3	42.5	-2.8	42.5	-2.8	41.3
Hourly wage	MAY	32.46	28.53	13.8	28.53	13.8	28.15
Electric Power Output Index (1967=100)[5]	MAY	109.1	107.1	1.9	107.1	1.9	108.9
Machine Tool Orders* (millions of dollars)[6]	MAY	574.56	383.49	49.8	383.49	49.8	472.63
Industrial Capacity Utilization (percent, SA)[1]	MAY	75.76	75.47	0.4	75.47	0.4	75.42
TRADE							
Electrical Mfrs' Shipments	MAY	4,998	4,497	11.1	4,497	11.1	4,698
Electrical Mfrs' Inventories (millions of dollars, SA)[2]	MAY	10,325	10,029	3.0	10,029	3.0	10,104
Electrical Mfrs' Inventory-to-Shipments Ratio	MAY	2.066	2.230	-7.4	2.230	-7.4	2.152
Electrical Mfrs' New Orders (millions of dollars, SA)[2]	MAY	5,027	4,482	12.2	4,482	12.2	4,773
Electrical Mfrs' Unfilled Orders (millions of dollars, SA)[2]	MAY	28,077	26,865	4.5	26,865	4.5	26,932
Exports, Electrical Machinery (f.a.s. value in millions of dollars)[2]	MAY	9,034	8,110	11.4	8,110	11.4	97,761
U.S. Dollar vs. Other Major Currencies (1973=100)[5]	MAY	114.06	116.10	-1.8	116.10	-1.8	116.72
PRICES & INTEREST RATES							
Industrial Commodities Wholesale Price Index (Bureau of Labor Statistics, 1967=100)	MAY	294.7	257.5	14.4	257.5	14.4	259.4
Electrical Price Index (Electrical Marketing, 1997=100)	MAY	230.2	216.2	6.5	216.2	6.5	216.6
Construction Materials Wholesale Price Index (Bureau of Labor Statistics, 1982=100)	MAY	377.1	362.6	4.0	362.6	4.0	362.8
Copper Prices (Metals Week, cents per pound)	MAY	626.42	464.15	35.0	464.15	35.0	481.81
Prime Rate[5]	MAY	6.75	7.5	-10.0	7.5	-10.0	7.37
Federal Funds Rate[5]	MAY	3.63	4.33	-16.2	4.33	-16.2	4.21
Mortgage Rate[7]	MAY	6.44	6.82	-5.5	6.82	-5.5	6.60

*Several series related to employment are now being reported on a NAICS basis. Because of this change, some numbers are not directly comparable to previously reported data, but are consistent in year-over-year comparisons and comparisons shown in the table.

Sources: [1]Dodge Construction Network; [2]Dept. of Commerce; [3]Manufactured Housing Institute; [4]Dept. of Labor; [5]Federal Reserve Board; [6]The Association for Manufacturing Technology; [7]Federal Home Loan Bank Board.
Note: Some figures shown—prime rate, for example—are averaged for month. NYA—not yet available
SA–seasonally adjusted. SAAR–seasonally adjusted annual rate. Source for chart: Global Insight.
For further information about construction starts, please contact Dodge Analytics at 1-877-784-9556

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People

WAGO Group (Germantown, WI): **Björn Twiehaus** will take over as CEO of the family-owned WAGO on Sept. 15. He succeeds **Jürgen Koopsingraven,** who currently serves as interim CEO in addition to his role as CFO.

Twiehaus brings extensive international experience from the electronics and automotive supplier industry. Most recently, he served as CEO of the Marquardt Group, a globally operating, family-owned mechatronics specialist. Before that, the mechanical engineer held various leadership positions at automative supplier FORVIA HELLA for more than two decades.

PolyJoule, Inc (Billerica, MA): This developer of conductive polymer batteries announced the appointment of **Dr. Bart Riley** as chief strategy officer and **Bud Collins** as an advisor to the company. Both individuals bring decades of experience building and scaling successful energy storage businesses.

PolyJoule batteries contain patented conductive polymer technology that eliminates thermal runaway risk, is non-toxic, recyclable, and free of rare-earth metals. Riley, co-founder and former CTO of A123 Systems, has spent 25 years guiding battery technologies from breakthrough to commercialization. He has held executive, advisory, and investment roles with over 20 battery technology companies ranging from pre-commercial to publicly traded companies and every stage in between.

Collins, who has formerly served as president of A123 Energy Solutions, CEO of NEC Energy Solutions and CEO of AESI, has spent his career designing and deploying large-scale battery systems across grid, commercial and critical power applications.

Agilix Solutions (St. Louis, MO): **Frank Lane** was promoted to VP of East Region. He has been with Agilix for 13 years and brings more than 31 years of industry experience to the role. Since joining the company as an account manager in 2013, he has advanced through a series of leadership positions, serving as branch manager for Washington, MO, before being promoted to district manager of East Region in 2024.

Agilix Solutions' East Region encompasses the St. Louis, Washington and Columbia branches in Missouri, as well as the Quincy, IL, branch. As regional VP, Lane will provide strategic leadership, partnering with branch teams to drive growth, strengthen customer relationships,and ensure operational excellence across the region.

Prior to joining Agilix, Lane spent 18 years as an industrial electrician, . Agilix Solutions is one of the 50 largest distributors in the United States, It was founded in 2021 through the merger of French Gerleman and IAC Supply Solutions. The company operates 13 branches across six states.

Obituary

John Sonnhalter, founder of the Sonnhalter, Cleveland,OH-based marketing communications firm known for its marketing to the professional trades in the construction, industrial and MRO markets, passed away on July 17.

Sonnhalter, 77, founded Sonnhalter in 1976 with a vision that was ahead of its time: manufacturers needed a marketing partner that understood not only business-to-business communications, but also how to reach the skilled tradespeople who specify, recommend and install their products.

Across nearly four decades with the agency, he built one of the industry's first firms dedicated exclusively to the construction, industrial and MRO markets. Beyond leading Sonnhalter, John became one of the industry's respected voices on industrial marketing. In addition to authoring articles and counseling manufacturers on channel marketing strategies, he created Sonnhalter's "Tradespeople Insights" blog, serving as its primary contributor until his retirement.

His passion for mentoring extended well beyond the agency. As a certified SCORE mentor, John helped entrepreneurs and nonprofit organizations develop strategic plans, strengthen their operations and achieve sustainable growth. He also helped launch and served on the board of nonprofit Good Knights of Lorain County, where his commitment to servant leadership reflected his lifelong desire to help others succeed.

Bill Wade, founder of Bill Wade & Associates, Huntersville, NC, passed away on July 6, 2026. Cindy Wade Brown, the company's VP of Sales, said in a post on the National Electrical Manufacturers Representatives Association (NEMRA) website, "Bill devoted his life to the electrical industry and was respected for his integrity, leadership and unwavering commitment to the manufacturers, distributors and partners he proudly served. As the first employee of NSI Industries when it launched its U.S. operations, he helped lay the foundation for a company that would grow into an industry leader.

"He later founded Bill Wade & Associates, building a respected manufacturers' representative agency known for trusted relationships and exceptional service.

Just weeks before his passing, Bill was honored with a Hall of Fame/Lifetime Achievement Award at CES Connect — a fitting recognition of the lasting impact he made throughout his career.

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