

Pacific Northwest targeted for growth

NATIONAL REPORT — Sales of hardlines and building materials are expected to rise marginally this year, and certain metropolitan areas could experience significant declines.

According to figures in the 1992 *Editor and Publisher Market Guide (E&P)*, 10 states—three of them in New England—will generate less sales in these categories this year. The other states and the District of Columbia will show at least slight home improvement sales increases, accord-

ing to E&P, which bases its estimates on sales of all outlets that sell these products, including discounters and specialty stores.

All told, the United States is expected to produce \$114 billion in hardlines and building material sales this year, a 2.5 percent increase over E&P's estimates from the previous year.

California, by far the nation's largest retail home improvement market (seven of the top 50 metro areas are in the state), will continue to

grow, but at a slow pace. This comes as no surprise, as several retailers throughout the state have experienced severe sales declines and contractor sales have been way down due to the virtual standstill in new home construction.

The Los Angeles and Long Beach areas, however, will continue to generate the most sales in any metro area. According to E&P, the metro L.A. region is projected to reach sales of about \$3 billion, slightly above last year's \$2.97 billion. (These data were calculated prior to

the rioting in Los Angeles, whose estimated damages are approaching \$1 billion, and whose rebuilding is likely to have a long-range positive impact on sales of these products).

On the other hand, the Pacific Northwest seems to be the home improvement hot spot, as sales are expected to grow in Washington and Oregon.

Although sales in Seattle are not expected to increase dramatically, they are continually inching upwards as several home improvement players are trying to grab a piece of

the pie. And Portland, Ore., which did not even rank among E&P's top 50 sales-generating cities last year, was ranked 48th with sales of about \$493 million.

The West, in fact, has several pockets of growth. Nevada is projected to expand its sales by nearly 8 percent; Arizona by just under 4 percent. But Colorado's sales are projected to decline by 4.3 percent.

The Texas market appears to be rebounding, too, with sales expected to grow by 4 percent. Houston, Dallas, Fort

Rank 1992	Rank 1991	City (Metro Area)	1992 Bldg. Mat'l Sales vol. (\$ MIL.)	1991 Bldg. Mat'l Sales vol. (\$ MIL.)	Percent Change 91-92
1	1	Los Angeles/Long Beach	3,067.9	2,974.6	3.1
2	2	Chicago	1,968.1	2,052.9	- 3.2
3	4	Philadelphia	1,833.4	1,797.6	1.4
4	3	Atlanta	1,783.7	1,810.5	- 1.5
5	5	Boston/Lawrence/Salem/Lowell/Brockton	1,766.6	1,758.6	0.5
6	6	New York	1,729.2	1,681.3	2.8
7	7	Detroit	1,692.5	1,640.5	3.2
8	8	Houston	1,607.8	1,541.7	4.3
9	9	Washington D.C.	1,541.3	1,526.4	1.0
10	10	Nassau-Suffolk, N.Y.	1,530.7	1,500.6	2.0
11	11	Minneapolis/St. Paul	1,395.3	1,346.3	3.6
12	12	Anaheim/Santa Ana, Calif.	1,292.9	1,260.7	2.6
13	13	Riverside/San Bernardino, Calif.	1,240.0	1,171.6	5.8
14	14	Dallas	1,208.1	1,158.4	4.3
15	18	Seattle	1,067.1	1,004.6	6.2
16	16	Phoenix	1,078.1	1,039.7	3.7
17	17	Tampa/St. Petersburg/Clearwater, Fla.	1,031.6	1,022.6	0.9
18	19	San Diego	972.9	950.1	2.4
19	20	Baltimore	914.9	906.2	1.0
20	15	St. Louis	866.3	1,102.0	-21.4
21	22	Oakland, Calif.	851.5	831.3	2.4
22	21	Denver	806.6	869.4	- 7.2
23	23	Sacramento, Calif.	768.0	734.1	4.6
24	24	Pittsburgh	736.6	724.6	1.7
25	28	Kansas City, Mo.	689.4	666.0	3.5
26	26	Orlando, Fla.	683.4	677.5	0.9
27	30	San Francisco	674.7	638.2	5.7
28	27	Miami/Mialeah, Fla.	673.3	667.4	0.9
29	31	Ft. Worth/Arlington, Texas	637.0	629.9	4.3
30	29	San Jose, Calif.	634.4	642.2	1.9
31	32	Charlotte/Gastonia/Rock Hill, N.C.	622.1	611.1	1.8
32	33	Bergen-Passaic, N.J.	608.4	604.0	0.7
33	37	Oklahoma City	605.8	562.0	7.8
34	34	Indianapolis	597.8	592.7	0.7
35	35	Norfolk/Virginia Beach/Newport News, Va.	596.2	580.9	2.6
36	36	San Antonio	589.1	564.8	4.3
37	39	Austin, Texas	565.0	541.7	4.3
38	38	Cleveland	552.5	542.5	1.8
39	25	Newark, N.J.	547.2	701.6	-22.0
40	40	Cincinnati	546.9	533.9	2.4
41	41	Ft. Lauderdale/Hollywood/Pompano Beach, Fla.	534.5	529.8	0.9
42	45	Milwaukee	527.7	497.1	6.2
43	47	Salt Lake City	525.2	495.0	6.1
44	48	New Orleans	518.9	482.1	7.6
45	43	Monmouth-Ocean, N.J.	513.1	509.4	0.7
46	46	Columbus, Ohio	504.9	495.7	1.9
47	42	Hartford/New Britain/Middletown/Bristol, Conn.	498.5	514.4	- 3.1
48	50	Portland, Ore.	493.2	449.9	9.6
49	44	Bridgeport/Stamford/Norwalk/Danbury, Conn.	476.2	499.9	- 4.7
50	49	Middlesex/Somerset/Hunterdon, N.J.	464.8	461.4	0.7
Totals and Averages			47,780.4	47,097.4	1.4

Source: Editor & Publisher

NHCN chart

Rank 1992	Rank 1991	State	1992	1991	1990	1989	1988	% Change 91-92	5-Year % Change
1	1	California	12,791,010	12,342,949	12,273,079	12,271,232	10,791,437	3.63	19
2	2	Texas	8,386,107	8,050,383	8,899,930	8,675,053	8,186,329	4.17	2
3	3	Florida	6,869,846	6,811,835	6,509,356	6,345,591	5,650,467	0.85	22
4	4	New York	6,166,378	6,005,202	5,680,246	5,449,515	5,035,120	2.68	22
5	5	Pennsylvania	4,757,568	4,677,851	5,389,077	4,197,617	3,764,572	1.70	26
6	6	Illinois	4,578,053	4,503,588	4,312,903	4,143,961	3,840,915	1.65	19
7	7	Michigan	4,152,560	4,018,534	3,864,746	3,685,578	3,228,616	3.34	29
8	8	Ohio	3,966,101	3,895,831	3,698,337	3,591,415	3,304,288	1.80	20
9	9	North Carolina	3,778,170	3,719,948	3,606,701	3,443,849	3,006,706	1.57	26
10	10	Georgia	3,295,495	3,469,853	3,242,769	3,123,212	2,687,019	- 2.14	26
11	11	New Jersey	3,257,718	3,234,204	3,174,269	3,095,050	2,666,903	0.73	22
12	12	Massachusetts	2,866,985	2,852,879	2,763,410	2,627,893	2,367,428	0.49	21
13	13	Virginia	2,746,903	2,673,211	2,499,484	2,443,539	2,171,252	2.76	27
14	14	Minnesota	2,736,943	2,647,377	2,738,568	2,585,643	2,359,060	3.38	16
15	16	Washington	2,603,282	2,403,757	2,369,929	2,310,926	2,037,892	8.30	28
16	15	Indiana	2,523,631	2,505,153	2,362,529	2,295,205	2,160,810	0.74	17
17	17	Missouri	2,442,386	2,373,901	2,216,729	2,300,571	2,074,472	2.88	18
18	18	Wisconsin	2,352,985	2,210,276	2,153,888	2,112,457	1,912,585	6.46	23
19	19	Louisiana	2,146,574	1,995,051	2,142,681	2,045,309	1,862,052	7.59	4
20	20	Tennessee	1,968,841	1,964,158	1,909,074	1,865,293	1,674,766	1.26	19
21	21	Maryland	1,939,243	1,916,768	1,699,499	1,747,803	1,514,491	1.17	28
22	26	South Carolina	1,832,488	1,628,258	1,646,669	1,567,535	1,427,049	12.54	28
23	22	Colorado	1,817,519	1,899,019	2,048,875	2,017,001	1,868,142	- 4.29	- 4
24	23	Arizona	1,752,414	1,690,418	1,745,963	1,719,860	1,491,799	3.67	17
25	24	Alabama	1,699,957	1,658,747	1,593,940	1,560,034	1,393,934	2.48	22
26	25	Connecticut	1,597,846	1,655,460	1,536,052	1,457,802	1,322,763	- 3.53	21
27	27	Kentucky	1,576,465	1,504,305	1,500,670	1,423,549	1,330,516	4.81	19
28	28	Oklahoma	1,550,558	1,477,301	1,581,999	1,528,272	1,504,480	4.96	3
29	29	Iowa	1,533,165	1,461,027	1,559,114	1,504,156	1,440,189	4.94	6
30	30	Kansas	1,301,132	1,209,305	1,247,333	1,218,105	1,167,170	7.59	11
31	31	Oregon	1,297,352	1,205,209	1,193,102	1,142,276	1,019,000	7.65	27
32	32	Arkansas	1,032,236	1,019,384	1,043,675	1,002,414	902,357	1.26	14
33	34	Mississippi	968,545	937,838	977,944	929,210	854,168	3.27	13
34	33	New Hampshire	968,540	1,011,339	931,023	882,097	744,458	- 4.23	30
35	36	Nebraska	863,784	833,776	911,132	866,559	827,001	3.60	4
36	35	West Virginia	834,884	837,867	807,488	766,330	763,813	- 0.36	9
37	37	Maine	812,032	788,835	715,009	678,921	600,681	2.94	35
38	38	Utah	795,587	749,442	802,164	784,096	735,398	6.15	8
39	39	New Mexico	755,468	738,503	738,888	834,326	770,792	2.32	- 2
40	41	Nevada	620,155	575,083	632,675	603,188	546,948	7.84	13
41	40	Alaska	591,424	598,301	662,659	651,579	638,160	- 1.15	- 7
42	43	Montana	474,206	456,870	508,614	499,904	482,538	3.79	- 2
43	42	Idaho	449,736	484,331	531,606	504,145	471,813	- 7.14	- 5
44	44	Vermont	430,424	436,484	422,412	405,748	346,453	- 1.39	24
45	45	Rhode Island	419,054	413,704	385,925	365,261	332,005	1.29	26
46	46	North Dakota	415,421	408,176	430,608	407,573	423,181	1.77	- 2
47	47	South Dakota	413,398	393,519	413,961	392,159	368,370	5.05	12
48	49	Hawaii	388,391	370,324	337,905	321,736	288,159	4.88	35
49	48	Delaware	330,881	377,775	269,248	338,437	308,184	-12.41	- 7
50	50	Wyoming	274,616	279,490	339,623	323,825	324,820	- 1.74	- 15
Totals and Averages			114,243,977	111,372,799	111,092,080	107,852,890	97,213,521	2.58	18

Source: Editor and Publisher

NHCN chart