



ASA REVIEW

NETWORK Great Ideas session continues to offer members out-of-the-box ideas on critical industry issues.



Photo by Steve Woltmann/ASA

Inside This Issue: Creative Succession Plans | ASA 2025 Year in Review
Why Product Standards Matter | Experience Is The Product You Actually Sell

FROM THE CEO



A strong 2025 sets ASA up for even greater heights in 2026

Today, more than 300 volunteers work on our strategic plan, always pushing ASA to look into the future, keeping us focused on what's next and how we should be positioned to help our members win the future.

No other trade association engages so many members to create one voice and one future. Most importantly, it's giving ASA the ability to deliver on the promise of our mission of being the Unified Voice That Drives the Success of the PHCP and PVF Supply Chain Industry.

Thanks to the hard work of these dedicated and engaged volunteers, ASA had another very successful year in 2025, once again reaching net membership growth and profit goals along with launching some extraordinary programs such as our new Industry Product Data Standard and a new mega regional event, ASA West, that debuted in Napa, California last May.

In this issue of ASA Review, we look back at all the many activities our strategic councils tackled this past year and the strong year of accomplishment our association achieved as we continue to expand the value of ASA to the industry and most importantly, to our members.

Mike Miazga reports on the recent ASA member satisfaction survey as members speak out on the continued value of being a member. With 2025 being such an exciting year for ASA, we highlight our year in a six-page spread that highlights most of our many successes we experienced.

Also in this exciting issue, we report on another successful NETWORK and one of its highlight programs, The Great Ideas Roundtable session, as we look at a few of the more than 100 great ideas members identified to attack four critical topics covered during the session. Since we launched the Great Ideas format during NETWORK four years ago, we have delivered nearly 500 great ideas on many industry issues.

Jonathan Bein and **Brian Hawkins** from the Distribution Strategy Group reviews the e-commerce survey their firm recently concluded. As ASA's Project Talent expands its reach to thousands of potential job seekers, **Steve Edwards**, ASA's recruitment marketing director, takes a look at empowering members with practical recruitment tools and the benefits they offer to attract quality team members.

As our Industry Product Data Standard takes hold among industry distributors and manufacturers, **Nils Swenson**, ASA's director of innovation and technology, talks about the value of the new standard and the difference between standards and data sources.

As the industry's only national association, it is our goal to provide you with critical information to help you and your teams embrace the changes that are disrupting your futures. We are proud of this exciting quarterly publication as one tool that we offer to help you and your teams, and hope you are getting some actionable ideas from these insightful articles.

Thank you for being a member and supporting our mission.

Mike Adelizzi
CEO

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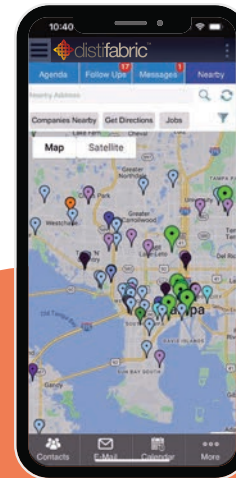


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When your kids don't want it: Creative succession plans that don't involve a 'for sale' sign



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By **Brad Williams**

For many private business owners, the plan has always been clearcut: build a solid, lasting business and pass it down to the next generation.

But what happens when those plans get uprooted? What happens when your kids have other ideas? For some, the thought of taking over their parents' supply company or manufacturing firm simply does not spark the same passion that built it.

When that reality sets in, many owners assume there's only one path left: sell. But that's not the only way forward. There are creative, strategic ways to transition ownership, preserve your legacy, and reward the people who helped build it, without ever putting up a "For Sale" sign.

Before considering an external sale, many owners find the first natural step is to explore ways to transition ownership internally, starting with their existing management team.

Management buyouts: A Management Buyout (MBO) can be one of the cleanest and most rewarding ways to transition a business internally. Instead of selling to an outside buyer, you sell to your leadership team.

These individuals understand the business's culture, its clients, and its value. With creative financing, a mix of bank loans, seller notes, and profit-based earnouts, ownership can gradually shift while maintaining continuity.

The beauty of an MBO is it rewards loyalty and leadership while keeping the business on familiar ground.

Employee Stock Ownership Plans: Few strategies align legacy and culture like an Employee Stock Ownership Plan (ESOP).

Through an ESOP, employees gradually acquire ownership through a trust, creating a company of true stakeholders. For owners who want to maintain independence and protect jobs, it's a solution that converts years of work into both liquidity and pride.

The financial incentives are also compelling. ESOP structures can deliver significant tax benefits for both the selling owner and the company. Giving everyone a piece of the pie typically cultivates a deeper sense of commitment to the company's success.

Legacy planning options: For owners who've reached the point where "why" matters more than "how much," a family foundation or legacy trust can be a powerful path.

A foundation allows you to direct your business wealth toward causes that reflect your values, whether that's education, community development, or industry advancement. It's a way to ensure your success continues to create value long after you've stepped aside.

When paired with a sound transition strategy, such as an MBO or ESOP, a legacy trust can blend financial prudence with purpose.

Professional leadership: Many owners underestimate the power of bringing in a professional CEO or non-family leadership team.

This approach can be especially effective when ownership stays within the family but operational leadership transitions to seasoned executives. The founder remains a guiding presence through the board or an advisory role, while the company evolves under professional management.

This model preserves independence, rewards performance, and often enhances enterprise value by professionalizing governance and decision-making.

Together, these strategies show that even if the next generation isn't interested, there are creative paths to preserve your business, protect your legacy, and reward those who help build it.

Even if your children don't wish to take the reins, your business and the legacy you've built doesn't have to end with a sale. By exploring options such as management buyouts, ESOPs, legacy trusts, or professional leadership, you can preserve your company's culture, reward the people who made it successful, and continue creating value for years.

The key is to plan intentionally, think creatively, and embrace strategies that align your personal goals with the future of the business. Your legacy can thrive, even without a family successor.

Brad Williams is managing director at The Beringer Group, an independent advisory firm dedicated to serving privately held businesses, family offices and high-net-worth individuals. Contact him at bwilliams@theberingergroup.com. ■



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Building consistent product data: *Why standards matter, even with established data sources.*

By **Nils Swenson**

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As product data continues to play a larger role in distribution operations, digital commerce, and internal systems, many organizations are reassessing how they manage and govern that data.

In those conversations, one question comes up repeatedly: If a company already receives product data from a trusted source, why is an industry product data standard still necessary?

The question is understandable. Many distributors and manufacturers rely on established data providers to supply product information that supports day-to-day operations.

However, this question reflects a common misunderstanding of the different roles that product data sources and product data standards play. While closely related, they are not the same thing, and one cannot replace the other.

Product data source: A product data source is exactly what the name implies. It is the origin of product information. That

source may be a manufacturer feed, a distributor-maintained database, a third-party data provider or a combination of multiple inputs. Product data sources deliver content such as descriptions, specifications, images, dimensions, and other attributes. They answer the operational question of where product data comes from.

Product data standard: A product data standard serves a different purpose. Rather than supplying content, a standard defines structure and meaning. It establishes a common set of attributes, consistent naming conventions, formatting rules, and validation expectations. A standard answers the question of how product data should be organized, interpreted, and exchanged across systems and organizations.

This distinction is important because data sources, even high-quality ones, do not inherently guarantee consistency. Two sources may provide data for the same category but define attributes differently, apply different units of measure, or populate fields in inconsistent ways. Even within a single source, definitions and data quality can vary over time or across product lines. Without a shared standard, organizations must repeatedly interpret, normalize, and reconcile that variability internally.

Why the confusion?

This is often where confusion arises. Some stakeholders assume because they already receive comprehensive product data from a provider, a standard is unnecessary. In practice, that provider is acting as a source, not as an industry governing framework. Unless a data source explicitly aligns to a common standard, it is still applying its own definitions and structures. As a result, every distributor, manufacturer, and system downstream must adapt that data to fit their own internal models.

The ASA Product Data Standard exists to address this challenge. It provides an industry-agreed-upon framework that manufacturers and distributors can align to regardless of which systems or data providers they use. When product data conforms to a shared standard, it can be evaluated and validated against known expectations. This significantly reduces the effort required to integrate data into PIMs, ERPs, ecommerce platforms, and analytics tools.

Governance is another key difference. Product data sources are typically managed by individual organizations or vendors. Product data standards are governed collectively. The ASA Product Data Standard is shaped through industry input and reflects how products are sold, specified, and supported across the PHCP and PVF landscape. This approach helps ensure the standard remains neutral, practical, and aligned with real-world use cases rather than optimized for a single system or business model.

Standards also support long-term flexibility. Systems, platforms, and data providers change over time. A product data standard provides continuity across those changes.

Organizations that align their internal data models to a standard are better positioned to adopt new technologies, support additional channels, and integrate new partners without rebuilding their product data foundation each time. The standard becomes a stable reference point, while tools and sources evolve around it.

What ASA's standard is not

It is also important to clarify what the ASA Product Data Standard is not. It is not intended to replace existing data providers or force organizations to abandon tools that are working for them. It does not prescribe specific systems or vendors. Instead, it provides a common framework that allows those tools and sources to work together more effectively. Data sources supply the content. The standard supplies the structure and shared meaning.

For manufacturers, aligning to a product data standard simplifies the process of distributing data to multiple customers by reducing the need for custom formats and attribute definitions. For distributors, standards reduce the internal burden of cleaning, mapping, and reconciling data from multiple sources. For the industry as a whole, standards support more consistent customer experiences and more scalable digital operations.



Some stakeholders assume because they already receive comprehensive product data from a provider, a standard is unnecessary. In practice, that provider is acting as a source, not as an industry governing framework. Shutterstock Photo.

Ultimately, the ASA Product Data Standard effort is about improving interoperability and raising the baseline for product data quality across the industry. Having access to product data is only part of the equation. Ensuring that data is structured, consistent, and reusable is what allows organizations to fully realize its value. Product data sources remain essential, but standards are what allow that data to work reliably across systems, partners, and future initiatives.

Standard updates

Since the launch of the ASA Product Data Standard, the focus has shifted from definition to early adoption and alignment. Manufacturers and distributors are actively reviewing the standard, mapping existing product data to the attribute framework, and identifying where internal data models diverge from shared industry definitions. This early engagement has helped validate the standard reflects real-world product structures and use cases, while also highlighting areas where additional guidance and examples will help support broader adoption.

The next phase of work centers on expanding adoption support and formalizing governance. ASA continues to refine category coverage, attribute definitions, and validation guidance based on member feedback, while also establishing clear change management and governance processes to ensure the standard remains stable, transparent, and industry-driven over time.

Ultimately, the Product Data Standard effort is about improving interoperability and raising the baseline for product data quality across the industry. Having access to product data is only part of the equation. Ensuring data is structured, consistent, and reusable is what allows organizations to fully realize its value. Product data sources remain essential, but standards are what allow that data to work reliably across systems, partners, and future initiatives. ■

For more on ASA's Product Data Standard, visit www.asa.net/Industry-Standards/Product-Data-Standard



Among many advocacy-focused initiatives, ASA continues to take part in discussions surrounding data center construction, energy choice, acting on offshore drilling, and engaging decisionmakers in Washington on several tax, labor and regulatory issues. Shutterstock Photo.

Congress moves appropriations; ASA priorities target water, energy and workforce development

By **Steve Rossi**
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After experiencing the longest shutdown of the federal government in American history, Congress has attempted to try and pick up the pieces after a Continuing Resolution (CR) was finally agreed to and signed by President Trump on Nov. 13, that provided funding through the end of January.

Keep in mind the federal government is still largely operating under Biden administration budget priorities. In order to implement the priorities of President Trump, Congress has started to move appropriations bills for the current fiscal year, a few bills at a time. Should an agreement on the balance of appropriations not happen, a partial shutdown could happen after January 30.

As a result of the 43-day shutdown, Congress has been working diligently but is still behind on the timeline for significant pieces of legislation. Democrats had stood firm in their opposition to the budget, and later, the CR due to COVID-era Affordable Care Act (Obamacare) subsidies expiring at the end of 2025.

Part of the deal to get the CR passed in the Senate was to address this issue over the 10-week period that the CR funds the federal government. Republicans, including President Trump, have highlighted that ACA needs to be reformed beyond the subsidies, while Democrats want to continue under the current system, but make the subsidies permanent.

This is a key issue that has seen several Republicans with high numbers of ACA recipients in their district break with their party. One of the most prominent examples was with now former Rep. Marjorie Taylor Greene (R-GA) who had bucked the GOP on this issue, along with the Epstein files, and subsequently resigned her seat on Jan. 5.

In the Senate, a three-year extension of the subsidies was rejected, even though four Republicans voted to support it, but fell short of the 60 votes needed for passage. In a surprising development, the House passed the extension, 221-205, with nine Republicans supporting it. While it seems unlikely the subsidies will pass without a major breakthrough or a change in direction from the White House, the House will continue in a challenging environment with a razor-thin Republican majority.

Speaker Mike Johnson continues to have his work cut for him as his majority has temporarily shrunk in an election year. The day after Taylor Greene's resignation, House Republicans learned of the unexpected passing of Rep. Doug LaMalfa (R-CA) and Rep. Jim Baird's (R-IN) serious car accident. LaMalfa, in his seventh term in Congress, represented a GOP-heavy district in Northern California, and was a longtime advocate for forest management and water access. A special election for his current seat may be called for June.

The election to fill the Taylor Greene seat is being held on March 10. Two vacancies that heavily favor Democrats — the election for the late Texas Rep. Sylvester Turner's district was held on

Jan. 31, and the election for New Jersey Gov. Mikie Sherill's former Congressional seat will take place on April 19.

What does this mean? Speaker Johnson will have to work some caucus magic with his majority at 218-214 between Jan. 31 and March 10. Meaning, he can only lose two votes on any bill. With Republican mavericks such as Kentucky Rep. Thomas Massie potentially opposing some measures, moving any legislation that does not have bipartisan support will be tricky.

ASA initiatives

Congress will continue to work on passing a new Farm Bill, which includes some ASA legislative priorities for rural communities. Workforce reauthorization, another ASA priority, will likely be taken up in 2026, to help train and retain workers in the trades that will help create industry growth.

ASA continues to take part in discussions surrounding data center construction, energy choice, acting on offshore drilling, and engaging decisionmakers in Washington on several tax, labor and regulatory issues.

Due to significant policy changes at the federal level, several states have started to set their own regulatory policies. Several states have implemented their own individual policies on extended producer responsibility (EPR), climate reporting, and other regulatory requirements.

ASA continues to engage with the State of California on data reporting requirements for water heating equipment, as well as zero emissions goals. ASA continues to monitor and act on these and other state issues as needed.



ASA Vice President of Advocacy Steve Rossi (right) hosted a government affairs panel discussion at NETWORK2025 that included PHCC Vice President of Legislative Affairs Mark Valentini (left). ASA and PHCC will team up in May to host a Capitol Hill legislative fly-in. Photo by Steve Woltmann/ASA.

As part of our strong and ongoing advocacy efforts, ASA will join our industry partners at Plumbing Heating Cooling Contractors-National Association (PHCC) for a legislative conference taking place May 5-6 in Washington, D.C. This is a rare opportunity to represent our industry on Capitol Hill, with face-to-face meetings with senators, members of Congress and their staff.

In addition, attendees will receive briefings on current political and policy developments and enjoy distinguished networking and dining experiences. Please take this opportunity to represent our industry in Washington this spring.

If you have any questions regarding federal or state issues, please contact Vice President of Advocacy **Steve Rossi** at rossi@asa.net. 📧

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In 2025, Project Talent social media content impressions exceeded 1 million, reach expanded significantly and click-through rates more than tripled compared to the previous year. These increases indicate Project Talent messaging is not only being seen but is motivating users to explore career opportunities further. *Shutterstock Photo*

ASA empowers members with practical recruitment tools

By **Steve Edwards**

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The workforce challenge facing the PHCP and PVF industry is neither new nor unexpected. In 2025, the American Supply Association continued to move from diagnosis to action. Against the backdrop of persistent labor shortages, accelerating retirements, and intensifying competition for talent, ASA's Project Talent initiative gained meaningful traction, delivering measurable results while expanding its scope and impact.

ASA members have been clear and consistent in their feedback. Labor shortages remain a concern, retirements continue to outpace new hires, and the need for experienced talent is immediate. ASA's national labor studies have confirmed what members experience daily, the industry's workforce pipeline is under strain, and traditional recruitment methods alone are no longer sufficient.

These concerns were echoed repeatedly during ASA's annual LEAD Strategic Leadership Summit, where volunteers called for stronger outward-facing efforts to elevate the industry's profile. The message was clear, attracting talent is not just a human resources issue, it's a strategic imperative.

Project Talent gains momentum

A cornerstone of Project Talent is **SupplyIndustryCareers.com**, ASA's industry-facing career website designed to introduce job seekers to the breadth of opportunities within the PHCP and PVF industry. In 2025, the site experienced significant year-over-year growth that signals growing interest in the industry.

During the first quarter alone, total active users more than doubled, page views increased dramatically, and engagement with the interactive Member Map surged. This map, one of the platform's most powerful tools, allows job seekers to explore ASA member companies by geography and identify those actively hiring, offering internships or maintaining a visible social media presence.

As more members activated the "Now Hiring" feature in their ASA.net profiles, the map became increasingly valuable as a real-time recruitment connector. Currently, nearly 80 member companies representing more than 2,800 locations nationwide were highlighted as actively hiring. Importantly, this visibility translated into action, with notable increases in clicks directing job seekers to member websites.

These metrics reflect more than web traffic — they represent growing awareness of the supply industry as a legitimate career option and increasing alignment between job seekers and ASA member employers.

Social media as a recruitment accelerator

In parallel with website growth, ASA expanded its social media presence as part of Project Talent's broader digital strategy. Recognizing younger job seekers increasingly rely on platforms like Instagram, Facebook, and X to research careers and employers, ASA invested in both organic and targeted paid campaigns.

The results were compelling. Content impressions exceeded 1 million, reach expanded significantly and click-through rates more than tripled compared to the previous year. These increases indicate Project Talent messaging is not only being seen but is motivating users to explore career opportunities further.

Through employee spotlights, career path education, internship promotion, and industry benefits, ASA continued reshaping outdated perceptions of the supply industry. Rather than competing solely on compensation, Project Talent focused on purpose, stability, growth, and long-term opportunity, qualities that resonate strongly with today's workforce.

Empowering members with practical tools

While national visibility is essential, ASA recognizes that hiring decisions happen locally. To support members directly, the **Recruiter Toolbox** on ASA.net continued to expand throughout 2025, offering a centralized hub of recruitment resources previously available only to large organizations with dedicated HR teams.

Members gained access to customizable job descriptions, messaging templates, professionally designed graphics, outreach presentations, and curated links to job fairs, schools, and community organizations. These tools help level the playing field, particularly for smaller distributors, manufacturers and reps navigating tight labor markets with limited internal resources.

One of the most impactful offerings this year was ASA's **complimentary personalized website reviews**. These reviews evaluate member websites through the lens of a job seeker, assessing factors such as ease of navigation, clarity of careers information, mobile optimization, and cultural messaging. By year's end, dozens of members had received tailored, actionable feedback to help transform their websites into more effective recruitment assets.

A consistent finding emerged from these reviews: many member websites lacked visible careers information altogether. Addressing this gap is critical, as a company's website often serves as a candidate's first impression and first decision point.

AI in recruitment

Artificial intelligence was a prominent theme throughout 2025, and ASA took a proactive role in helping members understand how AI can enhance recruitment without sacrificing the human touch. Through Project Talent webinars and resources, ASA explored how AI tools can streamline time-consuming tasks such as writing job descriptions, screening resumes, scheduling interviews, and generating social media content.

Importantly, ASA emphasized balance. While AI can dramatically improve efficiency, particularly for small or individual recruitment teams, it should serve as an assistant, not a replacement, for human judgment and relationship-building. The use of technology must be balanced with maintaining candidate trust, personal interaction and ethical oversight.

By demystifying tools like ChatGPT, Microsoft Copilot, and AI-powered applicant tracking systems, ASA helped members adopt technology thoughtfully, using it to improve candidate experience rather than depersonalize it.

Expanding the talent pipeline: Internships and early-career hiring

Internships emerged as a strategic focal point in 2025. With an aging workforce and insufficient numbers of young workers entering the industry, ASA encouraged members to view internships not as temporary labor, but as long-term investments in talent development.

New resources introduced this year included a comprehensive Internship Program Guide, best-practice checklists, customizable job descriptions, and an industry overview presentation designed specifically for interns. These tools, all available in the **Recruiter Toolbox**, make it easier for members to launch or refine internship programs that are structured, meaningful and scalable.

ASA also expanded guidance on early-career recruiting through platforms like **Handshake**, helping members connect with college students and recent graduates, build relationships with career services departments, and participate effectively in virtual and in-person career fairs.

Together, these efforts reinforced the idea that workforce development must start earlier, and that consistent exposure, education, and engagement are key to building a sustainable pipeline.

Broadening the candidate pool: Recruiting military veterans

Another important theme in 2025 was the recruitment of military veterans. Through Project Talent webinars and ASA Insights articles, ASA highlighted the strong alignment between military experience and supply industry roles.

Veterans bring transferable skills, discipline, leadership, safety awareness, and a strong work ethic, qualities that translate seamlessly into warehouse operations, logistics, sales, and customer service roles. For many members, veteran recruitment represents both a practical staffing solution and a values-based approach that strengthens company culture.

By promoting available resources and sharing best practices, ASA encouraged members to view veterans as a high-potential talent pool.

For more on ASA's Project Talent initiative, contact **Steve Edwards** at sedwards@asa.net. 



Zoeller Pump's Zach Cooper listens to a tablemate at the Great Ideas Roundtable session. Attendees provided many important takeaways on a variety of topics, including attracting and retaining talent in a shifting workforce. Photos by Steve Woltmann/ASA.

NETWORK 2025 Great Ideas session tackles critical issues facing members

By **Mike Adelizzi**, CEO
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In its fifth year, ASA's Great Ideas roundtable event conducted each year at NETWORK has delivered nearly 500 great ideas on how firms are dealing with critical issues facing the industry.

Participants at this year's event in Ft. Lauderdale, Florida tackled how firms are preserving experience for the next generation as older team members are retiring, how successful firms are attracting new talent, strategies for dealing with a turbulent economy in uncertain times and how the industry is beginning to tackle digital transformation.

Knowledge transfer: Preserving experience for the next generation

During this session on knowledge transfer, participants acknowledged the same primary challenge: decades of industry knowledge held by long-tenured, near-retirement employees is undocumented and sitting with aging reps, counter staff and managers —many in their 60s, 70s and even 80s. Even when you want to capture their expertise, it's unclear how to transfer relationships, field instincts, and nuance to the next person. Several participants admitted they came to the table specifically looking for ideas to solve this. Participants offered the following great ideas:

- Create an internal "source book" covering vendors, contacts, product sources, and processes.

- Maintain active SOPs but avoid letting them become stale.
- Build shadowing opportunities — don't wait for younger employees to initiate them.
- Capture knowledge during exit interviews or formal "retiree offboarding."
- Use video training, YouTube-style internal content, or AI tools to capture and organize expertise. However, training infrastructure should be more in-person not videos.
- Consider intern programs to document processes while learning the business.
- Soft-knowledge gaps — customer preferences, historical relationships or lessons from failed projects — were identified as the hardest to capture but among the most valuable.
- Some organizations use LMS systems, SOP libraries, or internal "playbooks," but adoption is inconsistent unless local leadership reinforces it.
- Building desktop repositories with SOPs, selling skills, ERP instructions, benefits information, etc.
- Ensuring critical processes are "on paper" so the company isn't exposed when someone exits.
- Unanimous agreement: Job shadowing is essential. Job shadowing for newer employees. Look at job shadowing as a form of mentorship. It is often easier and less intimidating than formal mentorship for new hires.

Attracting and retaining talent in a shifting workforce

Recruiting remains challenging across the board. What strategies are working to attract and retain top talent? How are companies adapting to hybrid or remote work while maintaining productivity and engagement? Here are some great ideas that participants offered:

- Create a great culture. Culture is key to attracting and retaining a great team.
- Heavy emphasis on networking and referrals, especially from trusted family or long-tenured employees. Offer referral bonuses.
- Annual compensation benchmarking against industry and regional data (ASA OPR reports were widely used).
- Create career pathing. Show employees what their career might look like and how they can obtain it. Younger people are impatient. They want to see a plan/path or they will leave.
- Cultural perks — company meals, social events, fitness rooms, on-site amenities, contests, PTO rewards.
- Younger employees expect flexibility, clear development paths, and work/life balance. Hybrid work remains polarizing — some roles simply must be in-person. Sabbatical programs (e.g., 1 month every 5 years) were shared as high-impact retention tools.
- Technology emerged as a retention differentiator: younger hires won't tolerate outdated systems, and poor software experiences can directly drive turnover.
- Everyone agreed: This industry is not naturally attractive to young people, and hiring outside the industry remains difficult. But when hiring outside the industry works, look for strong work ethic, willingness to learn, emotional intelligence, ability to remain calm when things go wrong
- Effective recruiting strategies mentioned: Hiring licensed plumbers or ex-field techs: unmatched credibility and problem-solving ability. Promoting from within (warehouse → counter → sales). Hiring for transferable skills: urgency, detail orientation, problem solving, customer empathy. Poaching during big ERP transitions. Leveraging strong culture — people want to work for organizations with a good reputation.

Dealing with a turbulent economy: Strategies for uncertainty

Inflation, volatile pricing, and supply chain unpredictability continue to impact quoting, margins, and customer relationships. Participants offered the following great ideas:

- Look to develop a growth strategy that is forward looking — Two-plus years out not just quarter by quarter. Try to stick with your plan while being flexible.
- Distributors don't want uncertainty over pricing.
- Provide honesty on lead times, which will provide trust by distributors over the long haul.

- Distributors should try to limit purchasing to normal quantities.
- Current and future prices should be posted on websites which will create certainty — list price ranges. Announce price increases through formal, dated letters.
- Distributors should consider pre-buys before price increases kick in.
- Diversity of suppliers is important to insure availability and pricing alternatives.
- Push marketing to customers — increase frequency.
- Look to use cost averaging — any increases should be passed along quickly.
- Share forecasts with key suppliers and customers to stabilize demand.

Navigating digital transformation: Balance innovation with operational excellence

Digital transformation can be daunting. Many employees lack the tools and knowledge to absorb what is needed. Distributors face pressure to modernize through ERP upgrades, AI, IoT, and e-commerce — often with limited resources or digital expertise. What technologies deliver the most value in operations, sales or customer experience? Table participants discussed these issues and offered the following great ideas:

- Have team members that have knowledge and ability to embrace digital transformation and teach other employees.
- Promote the new digital transformation as a development/career advancement opportunity to entice more employees to engage. Highlight that these new tools will enhance jobs, not replace them.
- Offer training as a lunch-and-learn.
- Explore Data Link as an opportunity to help link programs (Snowflake).
- Important to provide ample time to integrate. Align to be least disruptive.
- Engage tools such as ChatGPT and Copilot and become proficient.
- Advocate for less of what it is and more about what it can do. Talk possibilities.
- As ASA develops and offers expertise in digital transformation, refer to the association often to see what new things are offered. What shared experiences are available?
- Start with business outcomes, not technology.
- Anchor digital initiatives to clear operational goals: faster order fulfillment, lower inventory carrying costs, higher fill rates, better customer experience.
- Avoid “shiny object” tech; every investment should answer: What operational problem does this solve?

How do I get a copy?

To receive a copy of the full NETWORK Great Ideas session, contact ASA's **Mike Miazga** at mmiazga@asa.net. 📧

ASA Year in Review:

Another year of net growth and success.

The American Supply Association continues to be an indispensable resource for PHCP-PVF member companies and their employees.

This past year in 2025, the industry's only national trade association once again helped its members continue to prosper through its efforts on the education/training/workforce development, business intelligence/benchmarking, advocacy/codes and standards and networking fronts, not to mention the massive growth of its Embracing the Future initiative that rolled out the new ASA Industry Product Data Standard and provided vital guidance for members on hot-button topics such as cybersecurity, AI and customer digitization.

ASA achieved distributor net membership growth in 2025, while adding nearly 50 new total companies to the association's growing family.



Caption: 2025 ASA President Dave Poteete. Photo by Will Chu/ASA.



Photo by Steve Woltmann/ASA.

ASA Members Represent The Core of the Industry

Nearly **300** leading wholesaler firms | **4,400** wholesaler branch locations | **\$80-plus billion** in distributor sales
600-plus total wholesaler, supplier, rep, master distributor and service provider firms comprise ASA membership



Photo by Steve Woltmann/ASA

NETWORK continues to be the largest “all industry” event, attracting the largest audience of senior leaders

*“We came away with **FOUR** solid takeaways that we will further investigate for application in our business.”* – NETWORK2025 Attendee

NETWORK2025

Ft. Lauderdale Attendance

More than **80** distributor firms

850 industry professionals

More than **\$50 billion** in distributor sales

Nearly **290** total ASA-member companies in attendance



Former ASA presidents Katie Poehling Seymour (First Supply) and Bill Condrón (The Granite Group, right) interview General David Petreaus during NETWORK2025, which attracted 850 industry professionals from nearly 290 total ASA-member companies. Photo by Steve Woltmann/ASA.



The new ASA West Summit drew 225 attendees in Napa, California, providing a powerhouse education, best practices sharing and networking opportunity for ASA members in 11 Western states. Photo by Mike Miazga/ASA

ASA West debuts to massive success....

ASA expanded its regional offerings in 2025 with the debut of the new ASA West mega region and the first-ever ASA West Summit held at the Meritage Resort and Spa in Napa, California. The ASA West Summit, which draws wholesalers, suppliers and reps from 11 Western states, drew 225 attendees, set an ASA-regional-event record for sponsorship support out of the gates and provided attendees with a two-day program filled with education, best practices sharing and networking experiences. This year’s ASA West Summit heads to La Jolla, California May 12-14.

joins strong value offerings of ASA Central and Northeast regions



ASA’s Mike Miazga interviews Dallas Cowboys Cheerleaders Senior Director Kelli Finglass during the ASA Central Summit in Arlington, Texas. The second annual Central Summit set a new attendance mark and will look to do so again June 9-10 in Eagan/Minneapolis, Minnesota. Photo by Mike Miazga/ASA



The ASA Northeast Summit established new attendance and sponsorship benchmark for its well-received 2025 event held in Annapolis, Maryland. In addition to a strong education and best practices sharing program, attendees toured the U.S. Naval Academy grounds and enjoyed a memorable night-out seafood bash on the Annapolis waterfront. The Northeast group celebrates its fifth anniversary June 16-17 in Newport, Rhode Island. Photo by Mike Miazga/ASA



Photo by Alex Franco/ASA

ELEVATE unequaled in providing women professionals a platform to elevate careers

Women in Industry continues to gain momentum and make a meaningful impact across the PHCP and PVF channel. With 209 American Supply Association-member companies currently participating, the group saw 15 new companies join in 2025, and momentum is strong as we look ahead to welcoming 20 additional companies in 2026.

A major highlight of the year was ELEVATE2025, which brought together more than 400 attendees for an exceptional experience in Miami, featuring inspiring keynote speakers, engaging panels, networking receptions, and, most importantly, connections that will last well beyond the event. Building on that success, excitement is already growing for ELEVATE2026, taking place April 7–9 in Boston where another record crowd is expected.



EMERGE has become the industry event for future leaders to build their networks

Now in its second decade of existence, the ASA Emerging Leaders Division also continues its upward path. The 2025 EMERGE event in Las Vegas drew another crowd in excess of 200, set a new sponsorship high-water mark and brought together high-ceiling, high-potential employees for multiple days of best practices sharing, education and networking. EMERGE2026 takes place May 18-20 in Arlington, Texas.



Photo by Will Chu/ASA

LEAD: Planning the association's future

At the annual LEAD Strategic Leadership Summit in February in Southern California, more than 100 volunteer leaders gathered to discuss strategic initiatives designed to address the most pressing challenges and opportunities facing the PHCP-PVF distribution industry.

315

ASA is managing 315 volunteers from its member companies, building a stronger PHCP-PVF industry.

ASA members represent the core of the PHCP-PVF industry

ASA Advocacy offers unified voice to lead our industry

In 2025, the ASA Advocacy office continued its important efforts in protecting the industry's best interests at the federal and state legislative/regulatory levels, as well as in the codes and standards arena.

47

47 meetings were held with ASA Advocacy on Capitol Hill in 2025.

85

ASA enjoyed an 85% success rate on codes and standards positions taken.

73

The ASA PAC balance grew by 73% year over year.

260

PAC Authorization Forms on hand grew by 260% year over year, contributing to PAC growth.

ASA University continues to be the industry standard to train your teams at a cost-effective price

ASA University continues to be the proven, trusted leader in wholesale-distribution education, with tens of thousands of learners using ASA University year-over-year. With leadership development programs like our Master of Distribution Management program, we are not only training the leaders of tomorrow — we're creating them.

- No** No financial buy-in to gain access to 172 courses.
- No** No minimum financial commitment to train. ASA University is on-demand.

2025 ASA University Highlights

14,714 course registrations

95 unique courses taken by thousands of member learners

57 custom training tracks developed for members

Most popular training track: Inside Sales

Most popular course: Intro to PVF

Distributor members can access more than **280** supplier trainings from **35** vendors



MDM is a master class paying dividends to members

ASA University's Master of Distribution Management certificate program is a comprehensive, multi-format training focused on developing the industry's top leaders and creating more ability to move your company forward. In 2025, 18 employees from ASA-member companies graduated from the MDM program.



Project Talent continues to educate job seekers on great PHCP-PVF careers

ASA's Project Talent initiative continues to create awareness of the PHCP-PVF industry and its fulfilling careers plus provides tools and resources to help ASA members connect with job seekers (with the main vehicle being the SupplyIndustryCareers.com website).

- 224** Project Talent social media campaigns recorded 7.7 million content impressions, a 224% increase over 2024.
- 20,000** On SupplyIndustryCareers.com, the member map function (showing open positions at ASA-member companies) was visited nearly 20,000 times in 2025 and had 4,843 unique users (an 85% increase over 2024).
- 0** This impressive campaign to help attract new labor costs ASA members nothing.

ASA offers members support in building a career site that attracts job seekers.



Coburn Supply's Michael Maloney makes a point during an ASA Industry Strategic Advisory Team meeting in Chicago last fall. ASA has convened a next-gen panel



The ISAT team convened for a second live session during NETWORK2025 in Ft. Lauderdale, Florida. The team's findings will be presented during the LEAD Strategic Leadership Summit this month in St. Petersburg, Florida. Photos by Mike Miazga/ASA.



Voice of the Engineer survey provides ASA members insights into another key customer segment

ASA executed its third Voice of the Customer survey in 2025, zeroing

in on engineers, specifiers, designers and architects. This follows previous surveys targeted to plumbing and mechanical contractors and residential/commercial/industrial/multi-family builders. One of the many findings in the survey: 86% of respondents relay most on manufacturers' reps for product updates and information.

ASA convenes next-gen Industry Strategic Advisory Team to explore future challenges

To proactively shape the future of the distribution industry, ASA launched the 2025 Industry Strategic Advisory Team initiative that brought together a handpicked group of next-generation leaders to explore the critical inflection points, expectations and strategies that will define the industry over the next five to 10 years. The group met this past fall in Chicago at O'Hare Airport and again in Ft. Lauderdale at NETWORK2025. The group's work will be revealed at this month's LEAD Strategic Leadership Summit in St. Petersburg, Florida.

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ASA'S LONG-RANGE STRATEGIC PLAN

A BOLD VISION TO ADVANCE THE SUCCESS OF MEMBERS AND THE INDUSTRY

ARE YOU INTERESTED IN VOLUNTEERING WITH ASA?

f i X in

ASA success is led by a long-range strategic plan

ASA has been operating under a long-range strategic plan since 2008 and continues to bring volunteer leaders together annually to collaborate and draw on their collective experiences, look to the future horizon and push the association to shape a strategic vision that is forward thinking and actionable. The plan outlines the association's key goals, guiding our efforts toward a thriving future for our members.

9.3

When asked how valuable supporting an industry trade association is to the future of their business and industry, ASA members responded with a rating of 9.3 on a 10-point scale.

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PRODUCT DATA STANDARDS

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GAIN EFFICIENCY, CUT ERRORS, AND STREAMLINE OPERATIONS

START USING THE NEW PRODUCT DATA STANDARD TODAY.

ASA Product Data Standard guides the flow of data between industry firms

Last summer, ASA launched its Industry Product Data Standard with the goal of helping distributors and manufacturers share product data in a consistent, streamlined and efficient manner. By providing a common framework for data formats, it ensures all stakeholders can access, share and utilize data seamlessly and accurately. The standard's website has been expanded and updated to support broader adoption and ongoing governance.

ASA Embracing the Future: Navigating members through AI, innovation and cyber attacks

52 In 2025, 52 industry participants (representing 31 companies) were engaged in ASA Embracing the Future task group work.

3 3 new member-led task groups were launched, each producing concrete deliverables and guidance for the broader membership.

12 More than a dozen member-facing articles and editorial pieces were developed across ASA initiatives, including product data standards, digitization and customer intelligence, applied AI and cybersecurity. Four member-focused podcast episodes were produced to share industry perspectives.

ASA economic updates continue to provide deep insight for ASA members

ASA's Business Intelligence Unit continues to provide members with a wide suite of reports, surveys and economic updates throughout the year, all aimed at helping members win in their businesses.

2025 ASA Business Intelligence Offerings

9 9 Live economic update webinars in 2025

40 More than 40 economic podcasts published in 2025

12 Monthly detailed economic update reports for members

12 ASA Industrial Piping Division members receive a monthly exclusive Materials Market Digest report.

ASA
BUSINESS INTELLIGENCE

2026 OPERATING PERFORMANCE REPORT

THE GOLD STANDARD IN FINANCIAL BENCHMARKING FOR PHCP/PVF DISTRIBUTORS

SUBMIT DATA TODAY www.asa.net in f x @

OPR hits record participation numbers

More than 120 ASA-member distributor firms participated in one of the industry's most powerful resources, ASA's Operating Performance Report — the definitive financial and operational benchmark for PHCP-PVF distributors, giving participants an unmatched view into how their business truly stacks up.

70 More than 70 percent of ASA members find great value in the economic updates ASA Chief Economist **Dr. Chris Kuehl** provides members (live webinars, podcasts, written economic reports).



According to a recently completed member satisfaction survey, ASA members are highly likely to recommend ASA to a friend or colleague, as evidenced by a 9.0 score on a 10-point scale. Photos by Steve Woltmann/ASA.

Member satisfaction survey: ASA continues to deliver great value to its members.

By **Mike Miazga**
Vice President Sales-Operations
mmiazga@asa.net

The value the American Supply Association is delivering to its members continues to rise to new heights, that according to the most recent member satisfaction survey the association conducted in December.

ASA asked members how valuable they believe supporting an industry trade association is to the future of their business and industry. Responses to that question rated at an average of 9.3 out of 10 with 10 being the highest a respondent could vote. ASA members also are highly likely to recommend ASA to a friend or colleague, as evidenced by a 9.0 score on that same 10-point scale.

“ASA is a valuable organization providing advocacy on regulations, industry intel and market data, data standards, networking opportunities, and general sharing of best practices by industry experts,” one ASA supplier member wrote.

“ASA promotes and supports initiatives important to our industry’s long-term success and viability,” another respondent wrote.

One distributor respondent added: “ASA has given me the chance to meet and network with other businesses in my area and provides good programming and resources for a small business.”

The value of ASA’s many offerings

Survey respondents were asked to rate the value of ASA’s many programs and services using a 1-12 scale with 12 being the highest rank.

Along those lines, all four of ASA’s main pillars Advocacy, Business Intelligence, Education (ASA University) and Networking occupy the top four positions.

“ASA proactively supports and educates the industry to ensure its ongoing strength and viability,” one respondent noted.



Nearly 85 percent of survey respondents said they attended an ASA NETWORK event within the past year.

“Associations such as (ASA) are instrumental in driving development within the industry, while serving as a benchmark for the membership,” another respondent wrote.

Diving deeper into those four key drivers, 83 percent of respondents strongly agree or agree that ASA does a good job communicating updates and resources on government issues facing our industry. In fact, 93 percent of respondents say there are no other non-trade associations that can do a better job than ASA as being the voice of the industry in Washington, D.C. Nearly 90 percent of respondents feel ASA has become more successful in educating and protecting the industry in Washington.

When taking a look at the large suite of Business Intelligence offerings ASA provides members, ASA Chief Economist **Dr. Chris Kuehl** along with his partner **Keith Prather** at Armada Corporate Intelligence continue to score high marks with ASA members with more than 70 percent of members having consumed one or more of their offerings: the monthly written economic report, the live monthly economic update webinar and the weekly economic update podcast “Keeping it Real With Dr. Kuehl.”

“ASA is a huge community of industry giants that places a ton of value on having great peer relationships.” – ASA Member Satisfaction Survey Respondent

New programs launched

ASA's Embracing the Future platform debuted its important Industry Product Data Standard this past July that will significantly improve the efficiency and effectiveness of data exchange between distributors and manufacturers in the industry.

Nearly 75 percent of survey respondents say they have some level of familiarity with this important industry initiative and 84 percent of respondents feel the Industry Product Data Standard is important for the PHCP-PVF industry's future.

On the education front, ASA's Workforce Development Council spent significant resources over the past year to improve ASA University's course library. More than 70 percent of survey respondents say they have some level of familiarity with these enhancements. And more than 70 percent of respondents are familiar with ASA University's growing Master of Distribution Management program (MDM), a 12-month, expert-led educational program specifically designed to help leaders in the distribution industry enhance their skills and drive impactful results.

“ASA does excellent work for the industry,” one respondent wrote. “Great training services tools and information about compensation and the health of the industry.”



On the subject of the value of networking, one survey respondent noted, “the ability to meet with distributors, manufacturers and fellow reps is invaluable to share successes and failures.”

Networking Events

Nearly 85 percent of survey respondents said they attended an ASA NETWORK event within the past year, while nearly half said they had been to the Women in Industry Division's ELEVATE conference within the last year, and 40 percent said they attended the Emerging Leaders Division's EMERGE annual Spring Forum within the last year, proving the networking component of association membership remains in high demand.

“The ability to meet with distributors, manufacturers and fellow reps is invaluable to share successes and failures,” one respondent said.

“Networking is critical and ASA is an excellent way to do that,” another respondent wrote. “The Women in Industry is such an empowering piece that is empowering future women leaders.”

Multiple survey respondents alluded to ASA's ability to bring different parts of the PHCP-PVF supply chain together.

“ASA is a huge community of industry giants that places a ton of value on having great peer relationships,” one member wrote.

“ASA is a premier association for our industry that goes well beyond industry news, in bringing wholesalers together with the intent to strengthen our collective interests/goals and offering resources to help do it,” another survey respondent said.

When asked why they rated ASA a 10 out of 10 in terms of supporting an industry trade association and its value to the future of their business and the industry, one survey respondent's reason was “having an industry partner that supports all areas of the supply chain,” they said. “Someone who knows and understands the industry and challenges at all levels is key to success.” ■

9.3

Members rated ASA a 9.3 out of 10 in terms of how strongly they believe supporting an industry trade association is valuable to the future of their business and industry.

A recent Distribution Strategy Group MEP customer data analysis shows inventory availability scores lowest in satisfaction despite ranking highest in importance. Customers also dinged distributors on product assortment and competitive pricing.

Experience is the product you are actually selling: What 5,000-plus customer responses reveal

By **Brian Hopkins** and **Jonathan Bein**
Distribution Strategy Group

Walk into any plumbing and HVAC wholesale branch and you'll find similar brands, comparable pricing, overlapping inventory. There are fewer and fewer "hard-to-find" products because distributors have rapidly expanded their assortments, and the Internet has made it easier to locate products.

One distribution executive responding to a recent industry survey put it bluntly, "In today's market where we all sell essentially the same products, how we sell and support our customers has become our most powerful competitive advantage."

Analysis of 5,063 customer responses from 10 MEP distributors confirms what many suspected but few have quantified — *customer experience has become the primary differentiator in wholesale distribution*. Companies prioritizing experience demonstrate higher retention rates, greater wallet share, and reduced cost-to-serve.

The question is whether you're measuring customer experience correctly. And more importantly, whether you've moved beyond the data to actionable insights.

The state of customer satisfaction

The overall satisfaction as measured by Net Promoter Score (NPS) for the 5,000-plus MEP customers of distributors who took the survey through Distribution Strategy Group's proprietary software, Customer Experience RX, was 45, or "Good." This result means there is opportunity for high-performing distributors to outperform competitors and win and retain customers through offering superior customer experiences.

NPS is one of several approaches to measure overall customer satisfaction and is currently in use by more than two-thirds of Fortune 500 companies. Its popularity makes it essentially a de facto standard.



To understand NPS ratings, you need to know what the numbers mean. Customers are asked, "On a scale of 0 to 10, how likely are you to recommend the company to a colleague or friend?" Customers responding with a 9 or 10 are considered "Promoters." Those rating a 7 or 8 are considered "Passive,"

and anyone giving a rating from 1 to 6 is deemed a “Detractor.” To get an NPS score, you remove the passive responses, then subtract the % of detractors from the % of promoters.

NPS reports the score without the % sign. Since negative numbers are mathematically possible using this system, the NPS range goes from -100 to +100. The benchmarks for performance are:

- Poor NPS: 29 or below
- Good NPS: 30 to 49
- Very Good NPS: 50 to 69
- Excellent NPS: 70 or higher

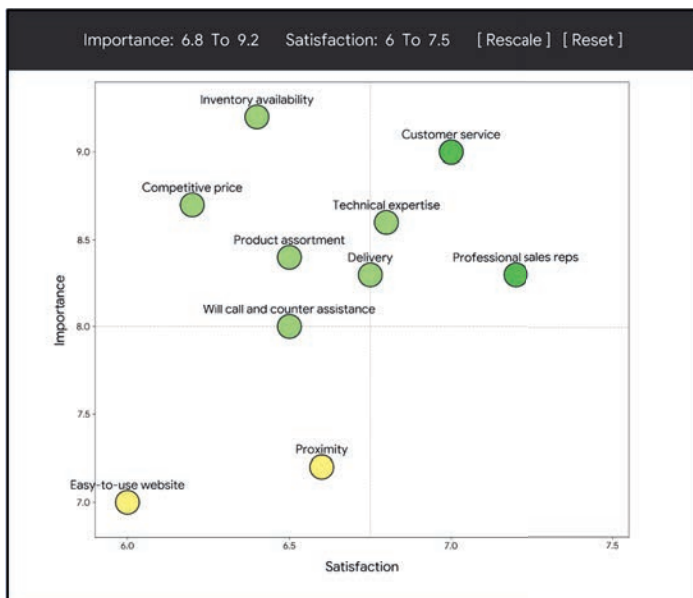
Deep dive: Understanding customer MEP customer satisfaction

Most approaches to measuring customer satisfaction suffer from two limitations:

1. They only provide an overall score and some verbatim comments. They do not offer detailed, statistically valid data on the underlying drivers for the customer’s level of satisfaction.
2. They treat all areas of performance as equal. In other words, the scoring for something essential such as “Customer Service” is given the same weight as an area of service that is often less important to customers, such as “Proximity.”

To solve these problems, you must ask customers about performance in key aspects of your business, and the importance of each item to them.

So, a low score on “Proximity” won’t affect an NPS score as much as a low score on “Customer Service.” This information can be presented in an “Importance” vs. “Satisfaction” matrix that is unique to each distributor and can be redrawn by segment, job function, geographic area, business unit and more. The chart below is aggregated from data provided by 11 MEP distributors.



What to actually do about it

Good sounds acceptable until you realize what it means. The gap between good and excellent represents the difference between customers who are satisfied but vulnerable to competitive offers, vs. customers who actively promote you to others. That gap translates directly to retention rates, wallet share and growth.

More revealing than the aggregate score is what customers said about where distributors excel and where they fall short. MEP customers rated their distributors highest on professional sales reps, customer service, technical expertise, and delivery performance. Those are the strengths worth protecting.

The problem areas? Inventory availability scores lowest in satisfaction despite ranking highest in importance. Customers also dinged distributors on product assortment and competitive pricing, though price complaints require interpretation since customers always have incentive to push suppliers toward lower prices.

According to Distribution Strategy Group data, generally, you can expect customers to be less satisfied with inventory availability. In practice, you can analyze by geography or branch to see if satisfaction for a particular location’s inventory is notably below others. You can also identify problem locations that can improve will-call/counter and delivery by digging into the data.

“Distributors winning in MEP markets aren't necessarily the ones with the lowest prices or the biggest warehouses.”

This benchmark data is helpful to understand where you should be and what potential areas you can differentiate against the competition. What’s more important is understanding how your customer base rates you on a variety of dimensions and then taking action to improve customer experience. Taking action is where most distributors fail.

The distributors winning in MEP markets aren't necessarily the ones with the lowest prices or the biggest warehouses. They're the ones who understand their customers better than anyone else, execute flawlessly on what matters, and continuously improve based on real feedback rather than assumptions.

ASA partner Distribution Strategy Group offers strategic guidance for distributors in the face of disruption, including insights, consulting and analytics. For more information, visit distributionstrategy.com.

Do you subscribe to ASA's weekly Insights e-newsletter? If not, contact ASA's **Mike Miazga** at mmiazga@asa.net.



Digital commerce revenue in plumbing distribution reached 12.2% of total sales in 2025, advancing from 9.3% two years earlier. Shutterstock Photo

How do your company's e-commerce offerings compare?

New study analyzes current digital market and strategic patterns.

By **Brian Hopkins** and **Jonathan Bein**
Distribution Strategy Group

ASA partner Distribution Strategy Group recently released findings from its new e-commerce survey that spans more than 10 verticals, including plumbing, HVAC, industrial, electrical, oil and gas and building materials (86 percent of the more than 400 respondents work for distributor firms). The following survey summary focuses on plumbing distribution, unless otherwise noted. Respondents identified what percent of total revenue went through the e-commerce channel.

Executive summary

Digital commerce revenue in plumbing distribution reached 12.2% of total sales in 2025, advancing from 9.3% in 2023. Firms achieving more than 10% e-commerce revenue increased from 28% to 41% over two years, while organizations exceeding 20% penetration stabilized at 19%.

Product data development relies heavily on in-house teams at 44% very heavy reliance. ROI satisfaction concentrates at moderate levels (37.5%), with dissatisfaction segments comprising 40.2%. Field sales representatives dominate marketing effectiveness at 55%, substantially exceeding digital channels including SEO (23%).

Industry context and market trends

E-commerce revenue progression demonstrates measurable acceleration, with 2.9 percentage points gained over two years. Traditional channels maintain about 88% of revenue, reflecting product complexity characteristic of plumbing distribution. Distribution across digital revenue tiers reveals 59% of firms remaining below 10% penetration in 2025, while the more than 20% tier stabilized at 19%.

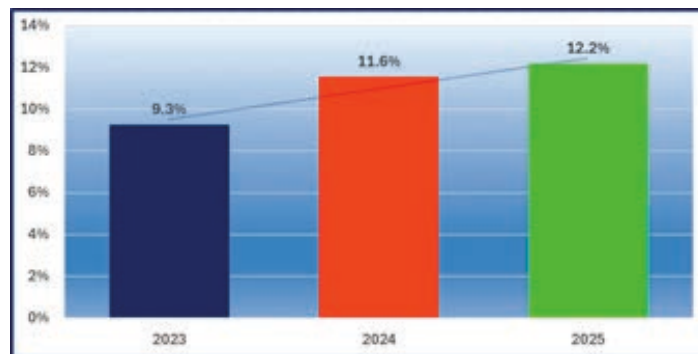


Figure 1: E-Commerce Revenue Growth (2023-2025)

The 12.2% revenue rate in 2025 indicates digital commerce maintains supplementary status. Traditional channels including phone orders, counter sales, and field sales continue commanding about 88% of revenue, reflecting technical consultation requirements characteristic of plumbing distribution.

The more than 20% (of total revenues derived from e-commerce) tier demonstrates modest progression, growing from 13% in 2023 to 19% in 2024 and 2025. Stabilization at 19% suggests natural ceilings where firms face operational constraints or strategic choices limiting further penetration. The more than 30% tier declined from 10% to 7% in 2025.

Digital maturity and strategic priorities

Plumbing distributors position at about 28% adoption and 12% maturity, placing in the mainstream cluster alongside building materials and HVACR sectors. JanSan operations lead at 35% adoption and 36% maturity. Product data development shows 88% with at least somewhat heavy reliance on in-house teams.

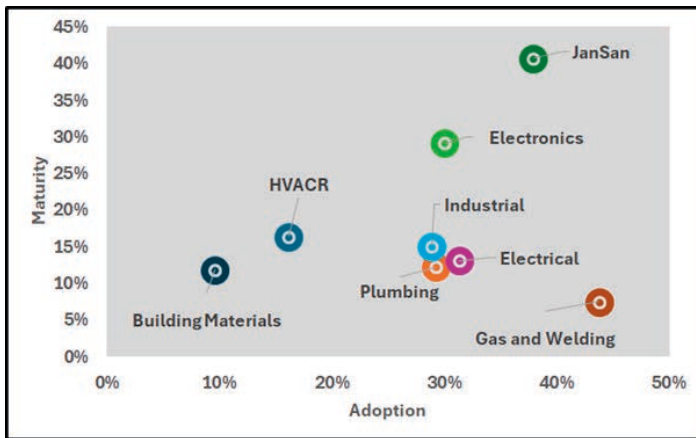


Figure 2: Digital Maturity vs. Adoption by Distribution Sector

The positioning suggests similar operational characteristics and technology investment patterns across construction supply sectors. Electronics and industrial sectors demonstrate higher maturity positioning, while gas and welding operations show lower adoption rates.

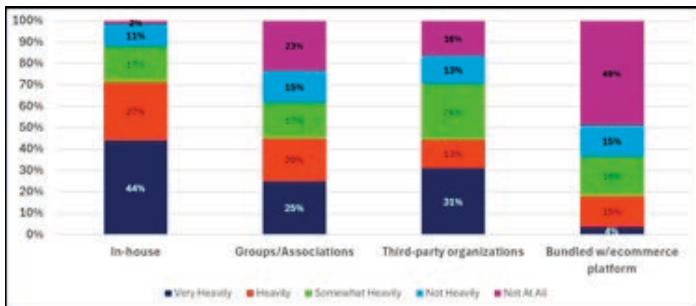


Figure 3: Product Data Development Reliance by Source

Combined with heavy and somewhat heavy categories, in-house reliance totals 88%, third-party 70%, and groups 62%. Platform-bundled content shows minimal very heavy reliance at 4%, suggesting limited adoption of integrated content solutions.

ROI satisfaction patterns indicate concentrated moderate satisfaction at 37.5%, with very satisfied at 16.5% and extremely satisfied at 5.7%.

Operations, technology and data

Organizations achieving more than 20% digital revenue demonstrate complete product data spanning 80-95% of SKU portfolios, with comprehensive specifications and technical documentation. Integration architecture connects platforms directly to ERP systems, enabling real-time inventory visibility and pricing accuracy. Customer experience capabilities include personalization, predictive reordering, and advanced search filters.

Organizations in the 10-20% range demonstrate product data completeness near 50-60% with significant SKU gaps, and integration architecture varying substantially. Organizations below 10% penetration maintain product data completeness below 40%, with missing images and incomplete specifications constraining platform utility.

Marketing enablement drivers

Field sales representatives dominate marketing effectiveness at 55%, substantially exceeding customer service representatives at 32% and inside sales at 24%. Digital marketing vehicles position significantly lower, including SEO, at 23%, email marketing at 11%, and marketing automation at 10%.

These human-centered channels command top positions, with digital vehicles positioning lower. The pattern indicates human relationships continue governing demand generation despite increasing digital transaction volume.

Customer adoption follows patterns driven by buyer demographics and purchase frequency. Customers buying routine items demonstrate higher digital adoption rates than those requiring extensive consultation. Salesforce engagement remains critical, with field representatives maintaining primary demand generation roles.

Strategic implications

Performance patterns across digital revenue tiers reveal distinct operational characteristics. High-penetration organizations maintain comprehensive product data, advanced integration architecture, and sophisticated customer experience capabilities. Mid-tier organizations demonstrate baseline functionality without exceptional business impact, while lower-tier positioning often reflects resource constraints or limited executive commitment.

Content development approaches vary substantially. Organizations prioritizing in-house development maintain dedicated teams and product information management systems, viewing product data as a strategic asset. Organizations leveraging third-party providers accept standardized content in exchange for rapid deployment and comprehensive SKU coverage.

ASA partner Distribution Strategy Group offers strategic guidance for distributors in the face of disruption, including insights, consulting and analytics. For more information, visit distributionstrategy.com.

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