



MARKET REPORT

Plumbing, Heating, Air Conditioning Contractors[238220]

Sector: Construction

Market Area: Zip Codes 17011,17043,17055

Release Date: June-2022

DEVELOPED BY

Midstreet Capital LLC

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About the Data

MAR 6TH 2023

Bizminer data is widely accepted for industry analytical work, benchmarking, valuations, forensics and litigation. Bizminer content is accepted in US Tax Court (Bauer vs. IRS: T.C. Memo. 2012-156) and is utilized by state, provincial and national taxing agencies in the US and Canada.

Raw data analyzed for Bizminer reports is sourced from an array of the nation's government and private statistical sources. None of these raw data sources creates the final measures reflected in Bizminer industry profiles. In total, Bizminer accesses over a billion sourced data points from 15 million business operations for each of its twice annual updates covering a 3-5 year time series.

Historical data and Bizminer algorithms are used to inform and test projections for non-reporting firms. Data elements are sourced specifically from:

- ✓ IRS SOI Corporation Tax Book
- ✓ US Economic Census
- ✓ US Census County Business Patterns
- ✓ Bureau of Labor Statistics Monthly Unemployment Reports
- ✓ Bureau of Labor Statistics Industry Productivity Reports
- ✓ National Agricultural Statistical Service
- ✓ US Census Retail Trade Report
- ✓ Business Valuation Resources (BVR)
- ✓ Business Directories
- ✓ IRS Statistics of Income
- ✓ US Census Quarterly Financial Reports
- ✓ Bureau of Labor Statistics Monthly Employment Reports
- ✓ Bureau of Labor Statistics Annual Wage Survey
- ✓ Bureau of Labor Statistics Price Indices
- ✓ US Census Quarterly Financial Reports
- ✓ Data Axle
- ✓ Credit Reporting Agencies
- ✓ American Community Survey

While 100% firm coverage is desirable for analysis purposes, the greatest value of Bizminer reports rests in discerning patterns of activity, which are reflected in the large samples used to develop our reports. The overall current coverage of the databases surpasses 13 million active business operations at any point in time.

As is the case with any databases this large, some errors are inevitable. Some firms are missed and specific information on others is lacking from the database. Not all information received is uniform or complete, resulting in the need to develop projection algorithms for specific industry segments and metrics in some report series. No representation is made as to the accuracy of the databases utilized or the results of subsequent analyses.

Competitive Summary

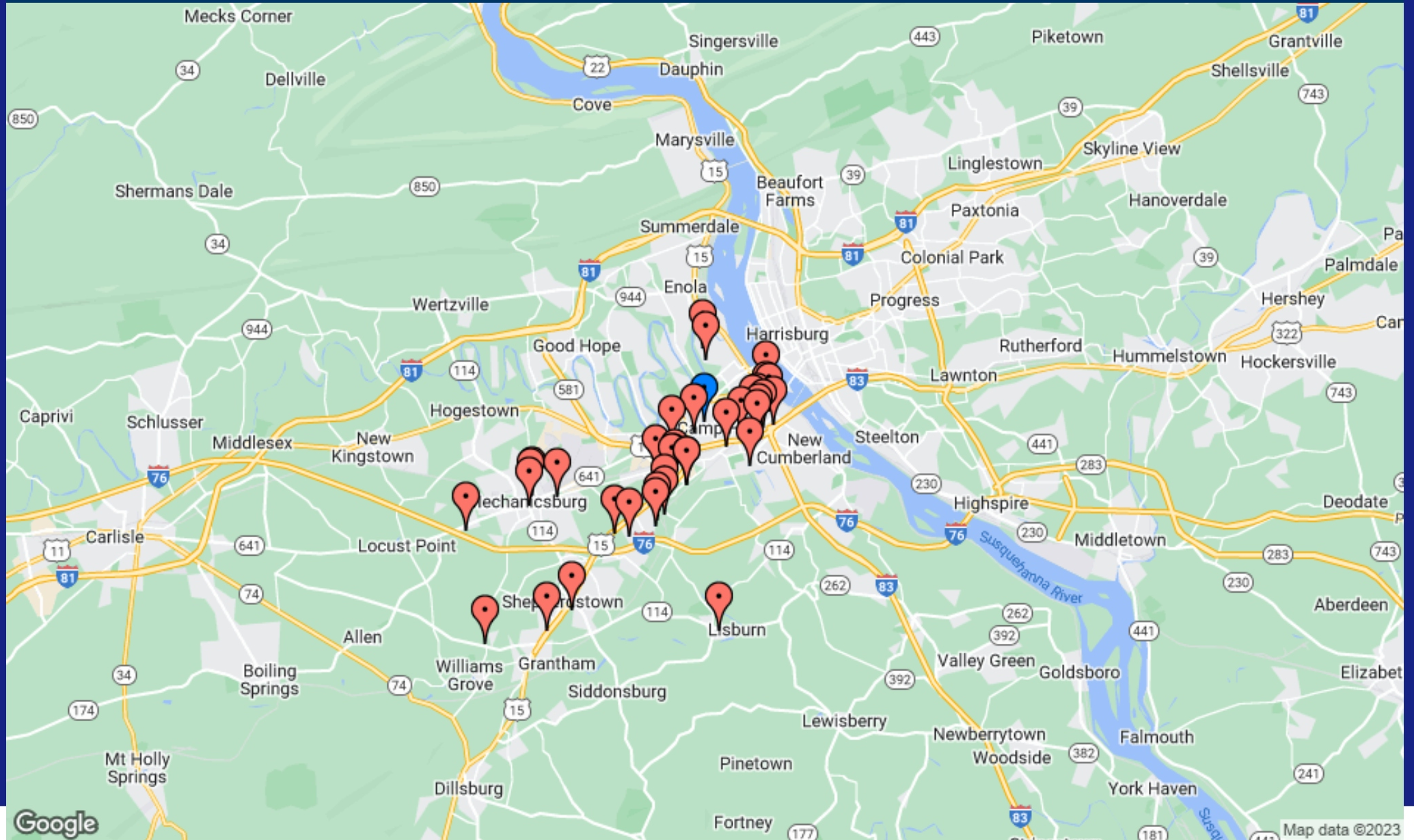
COMPETITIVE ANALYSIS SUMMARY	
Sales Rank:	14 of 45
Sales Percentile:	69
Sales Change (2019 to 2021):	10.94

VARIANCE FROM MARKET AREA INDUSTRY:	
Average Site Sales:	-19.31
Median Site Sales:	71.01
Average Small Business Sales:	18.27
Average Industry Wage:	-30.69
Sales per Employee:	-14.50
Efficiency Index (SPE/Avg. Wage):	1.23
Rent per Employee:	-83.45

Map

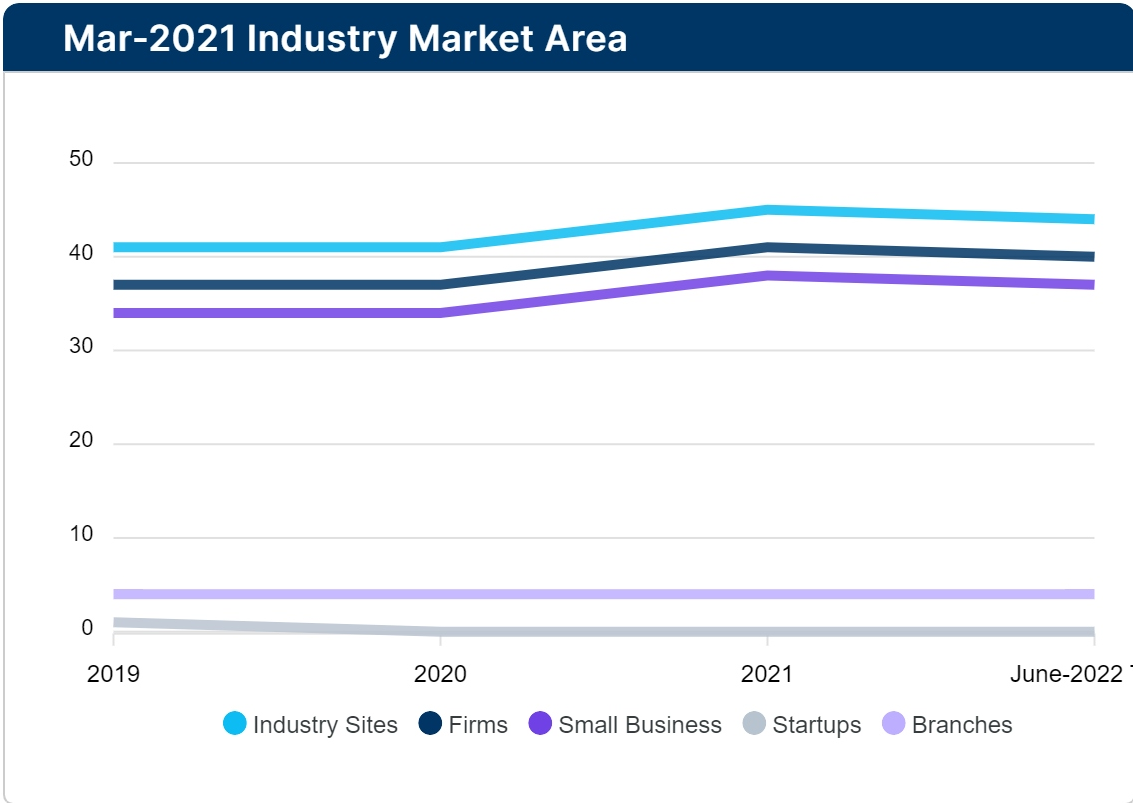
Industry Locations

June-2022 Industry Market Area Operations (up to 250 closest in market area)



Table/Companies

Industry Market Area Operations				
	2019	2020	2021	JUNE-2022 TTM
Industry Sites	41	41	45	44
Firms	37	37	41	40
Small Business	34	34	38	37
Startups	1	0	0	0
Branches	4	4	4	4



Competitive Market Narrative

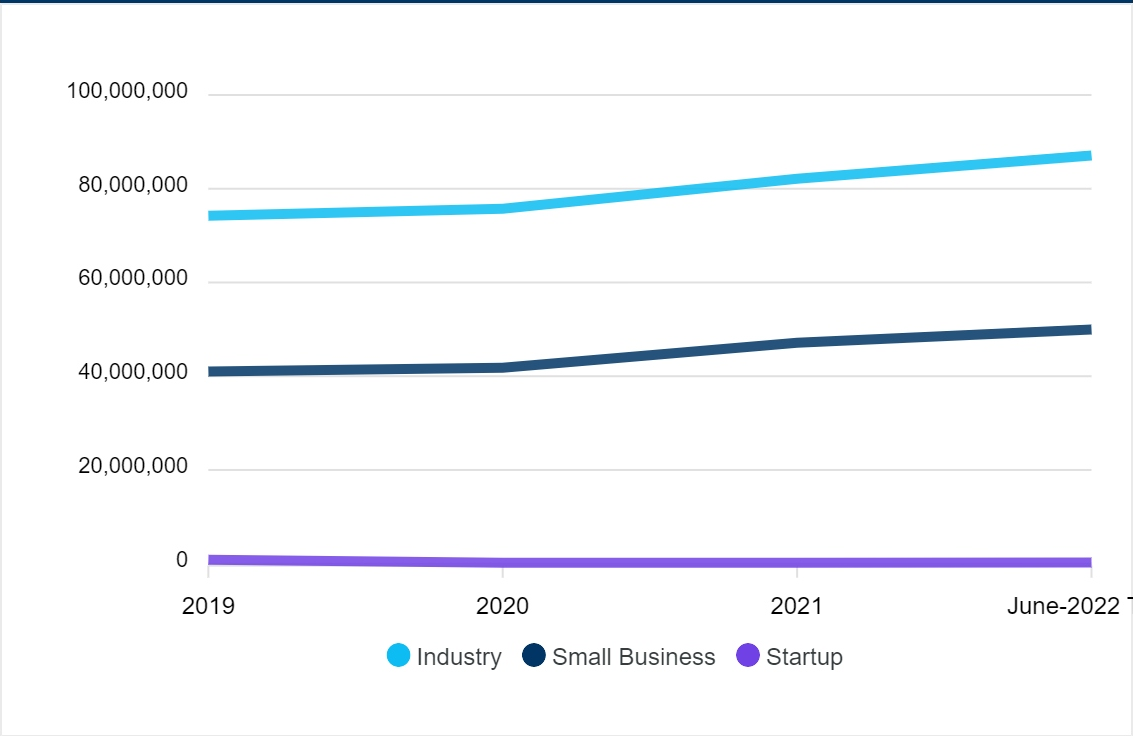
Industry operations in the market area account for a total market volume of \$87,071,255. Of that, the industry's small business segment in the market area earns \$49,955,090. Market volume and average firm sales calculations are developed with firm-level data which is integrated with BizMiner's internally generated Sales per Employee projections. SPE data is both industry- and location-specific, and is updated monthly by the application of US Census data and five industry and consumer price and productivity indices from the Bureau of Labor Statistics and other federal agencies.

Industry Market

Industry Market Volume (\$)

	2019	2020	2021	JUNE-2022 TTM
Industry	74,242,215	75,708,720	82,152,877	87,071,255
Small Business	40,990,068	41,799,744	47,133,286	49,955,090
Startup	836,532	213,264	220,249	233,435

Industry Market Volume(\$)

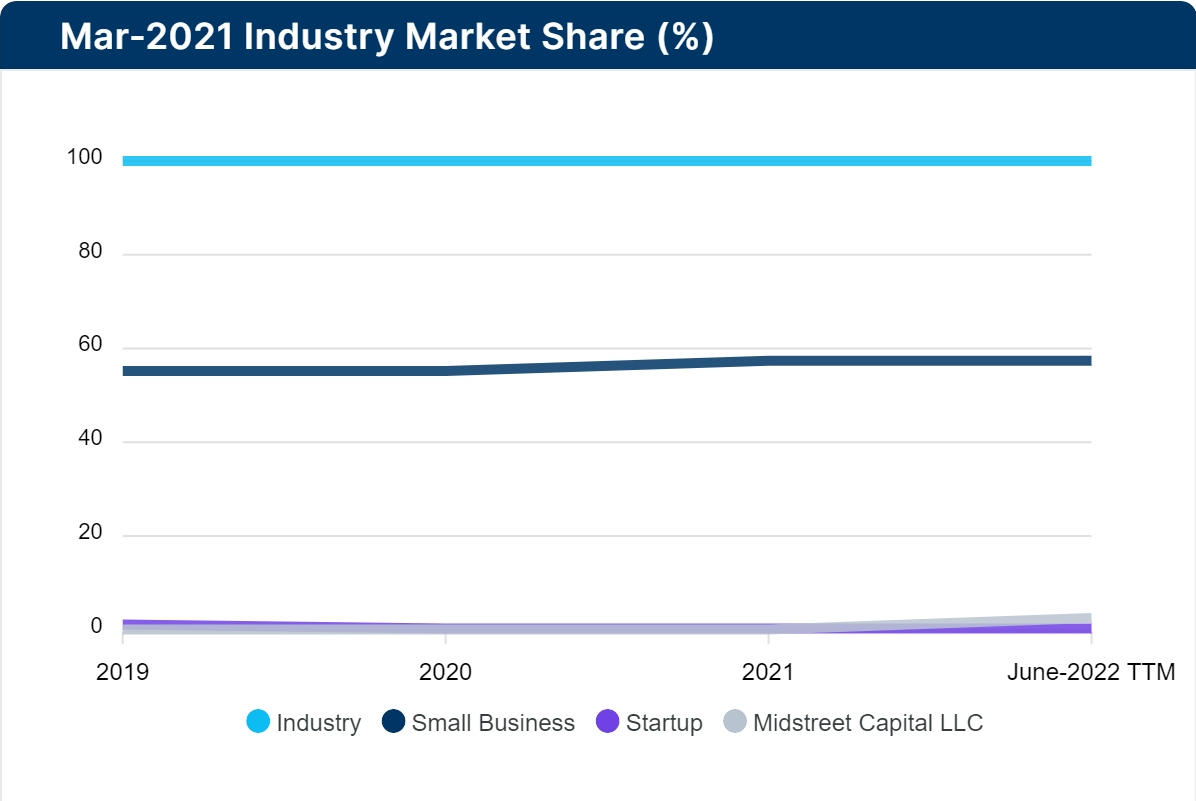


Industry Market Volume(\$)

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Industry Share

Industry Market Share (%)				
	2019	2020	2021	JUNE-2022 TTM
Industry	100.00	100.00	100.00	100.00
Small Business	55.21	55.21	57.37	57.37
Startup	1.13	0.28	0.27	0.27
Midstreet Capital LLC	0.02	0.02	0.02	2.47

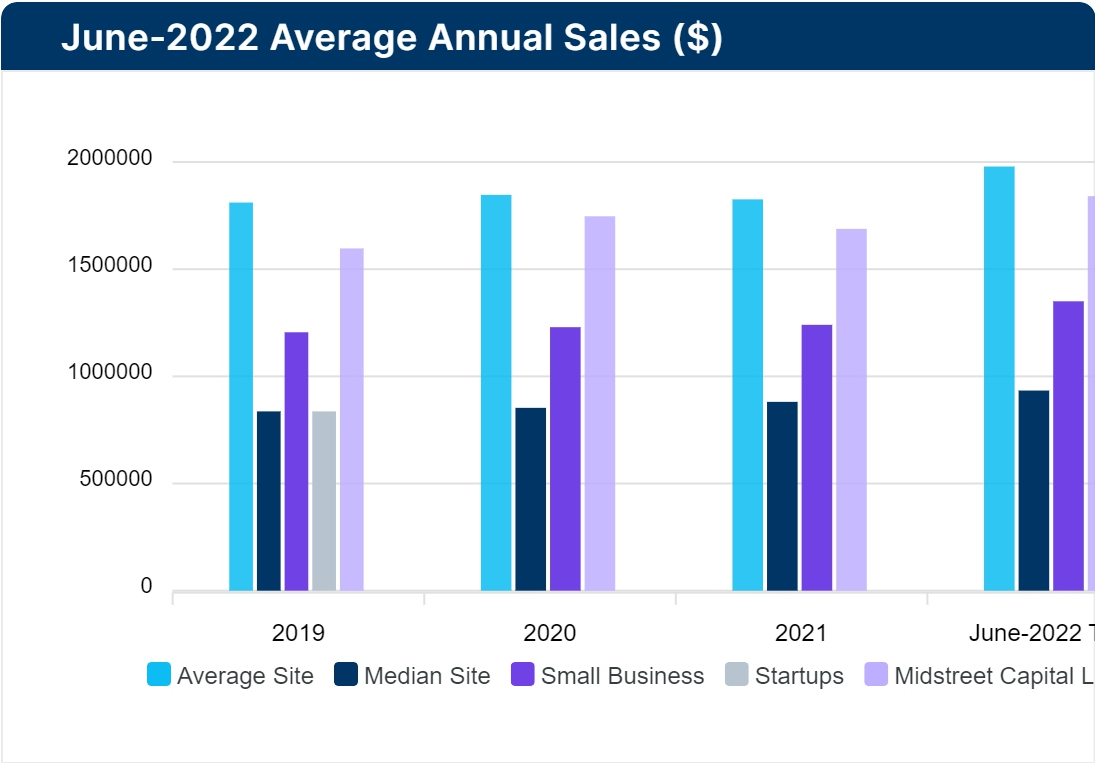


Competitive Market Narrative

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Annual Sales

Average Annual Sales (\$)					
	2019	2020	2021	JUNE-2022 TTM	% CHANGE:2021 TO JUNE-2022 TTM
Average Site	1,810,786	1,846,554	1,825,619	1,978,892	8.40%
Median Site	836,532	853,056	880,996	933,740	5.99%
Small Business	1,205,590	1,229,404	1,240,350	1,350,138	8.85%
Startups	836,532	0	0	0	0%
Midstreet Capital LLC	1,596,786	1,746,796	1,687,956	1,840,698	9.05%



Competitive Market Narrative

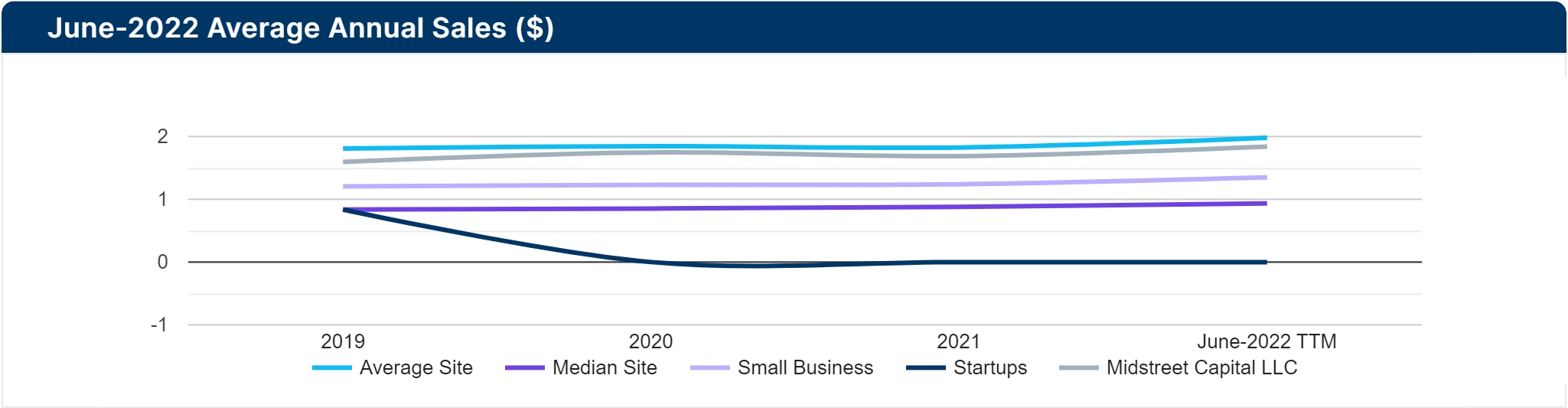
What are the average annual sales of all industry sites, small businesses and startups in this market? Median sales are also displayed to avoid distortion of averages by unusually large firms. If you made the necessary inputs, your firm sales are benchmarked.

Small business sales represent firms with <25 employees. Startup sales are calculated for firms in operation for less than two years.

Market volume and average firm sales calculations are developed with firm-level data which is integrated with BizMiner's internally generated Sales per Employee projections. SPE data is both industry- and location-specific, and is updated monthly by the application of US Census data and five industry and consumer price and productivity indices from the Bureau of Labor Statistics and other federal agencies.

Sales Rank

Annual Sales Rank		
	2021	TTM
Sales Rank	14 of 41	14 of 45
Sales Percentile	66	69
Variance from Average Sales (%)	-0.09	10.94
Variance from Median Sales (%)	0.98	108.93



COVID-19 Impact

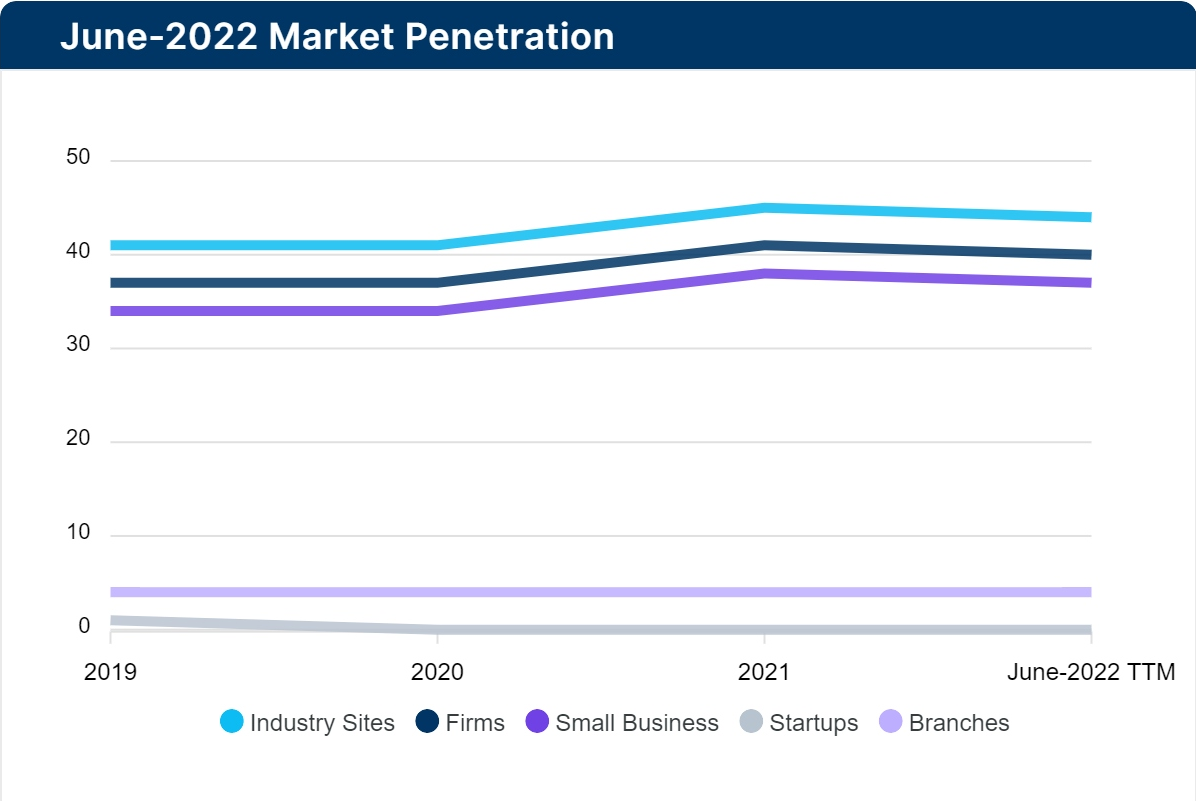
Month-To-Month Employment-Sales			
	EMPLOYMENT	MONTHLY INDUSTRY MARKET VOLUME	AVERAGE MONTHLY SITE SALES
Dec-19	41	712,190	17,370
Mar-20	40	708,632	16,105
Apr-20	24	425,683	9,675
May-20	24	425,683	9,675
Jun-20	42	754,487	17,147
Jul-20	43	754,809	17,155
Aug-20	71	1,246,682	28,334
Sep-20	70	1,236,738	28,108
Oct-20	72	1,265,895	28,770
Nov-20	71	1,263,177	28,709
Dec-20	70	1,224,975	27,840
Jan-21	68	1,190,527	27,057
Feb-21	69	1,219,676	27,720
Mar-21	69	1,226,495	27,875
Apr-21	70	1,252,521	28,466
May-21	71	1,274,399	28,964
Jun-21	73	1,341,136	30,480
Jul-21	72	1,317,799	29,950
Aug-21	73	1,331,700	30,266
Sep-21	71	1,258,744	28,608
Oct-21	71	1,337,976	30,409
Nov-21	70	1,332,590	30,286
Dec-21	73	1,403,079	31,888
Jan-22	70	1,348,368	30,645
Feb-22	40	774,867	17,611
June-22	48	987,547	22,444
July-22 Advance	47	969,059	22,024

COVID-19 Impact

% Change From Dec-19								
	JUN-20	JUL-20	AUG-20	SEP-20	OCT-20	NOV-20	DEC-20	JAN-21
Employment	-0.03%	-0.42%	-0.42%	0.03%	0.04%	0.73%	0.72%	0.75%
Monthly Industry Market Volume	0.00%	-0.40%	-0.40%	0.06%	0.06%	0.75%	0.74%	0.78%
Average Monthly Site Sales	-0.07%	-0.44%	-0.44%	-0.01%	-0.01%	0.63%	0.62%	0.66%

Penetration

Market Penetration (\$)				
	2019	2020	2021	JUNE-2022 TTM
Market Sales / Person	2,068	2,109	2,288	2,425
US Sales / Person	791	796	822	893
Market Sales / Household	5,270	5,374	5,831	6,180
US Sales / Household	1,875	1,887	1,950	2,117

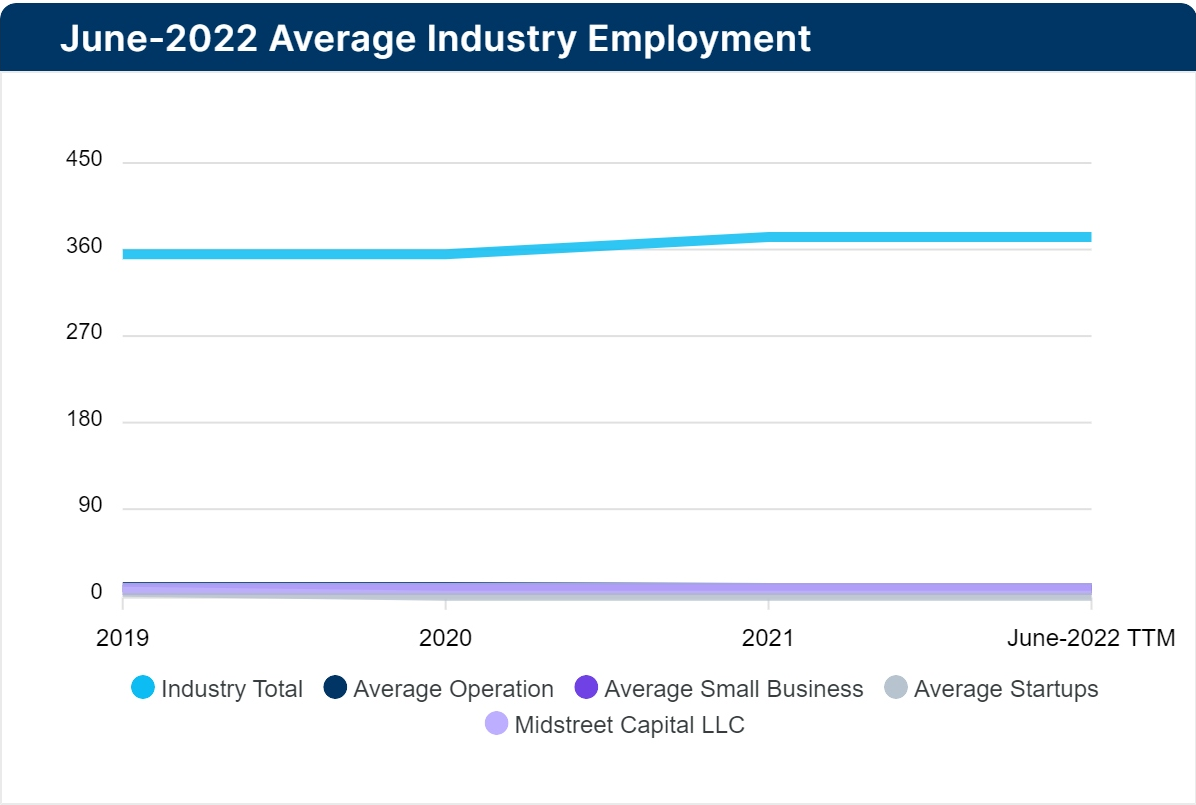


Competitive Market Narrative

The Plumbing, Heating, Air Conditioning Contractors industry captures \$2,425 in sales per person within the market area, while national levels are at \$893. Market area sales per household are calculated at \$6,180; by contrast, US industry sales per household are \$2,117.

Employment

Industry Employment				
	2019	2020	2021	JUNE-2022 TTM
Industry Total	355	355	373	373
Average Operation	9	9	8	8
Average Small Business	6	6	6	6
Average Startups	4	0	0	0
Midstreet Capital LLC	8	8	8	8



Competitive Market Narrative

In 2021, the Plumbing, Heating, Air Conditioning Contractors industry supported 373 employees in the market area, up from 2019. Of these, 272 are employed in small business operations of fewer than 25 workers.

Employment

How steady is industry employment? Does your firm employ more or less than the average in this industry market? This section reports on industry and small business employment. If you input employment history for your firm, it is benchmarked against the averages.

Sales Classes

Market Volume By Class (\$million)					
	SMALL 1-24	MEDIUM 25-99	LARGE 100+	UNKNOWN	TOTAL
2019	53.1	21.1	0.0	0.0	74.2
2020	54.2	21.5	0.0	0.0	75.7
2021	59.9	22.2	0.0	0.1	82.2

Percent Market Volume By Class					
	SMALL 1-24	MEDIUM 25-99	LARGE 100+	UNKNOWN	TOTAL
2019	71.56	28.44	0.00	0.00	100.00
2020	71.60	28.40	0.00	0.00	100.00
2021	72.87	27.01	0.00	0.12	100.00

Average Sales By Class (000)					
	SMALL 1-24	MEDIUM 25-99	LARGE 100+	UNKNOWN	TOTAL
2019	1397.0	7033.0	0.0	0.0	1811.0
2020	1426.0	7167.0	0.0	0.0	1847.0
2021	1426.0	7400.0	0.0	0.0	1826.0

Competitive Market Narrative					
In 2021, the Plumbing, Heating, Air Conditioning Contractors industry supported 373 employees in the market area, up from 2019. Of these, 272 are employed in small business operations of fewer than 25 workers.					

Sales					
What is the employment structure in your industry market?					
The Market Volume by Employment Class table displays the total market sales of industry sites in each bracket. Projected sales of operations for which sales cannot be ascertained (Unknown) are noted in the column and are based on average industry site sales in the market area.					

Employment

Establishments

	SMALL 1-24	MEDIUM 25-99	LARGE 100+	UNKNOWN	TOTAL
2019	38	3	0	0	41
2020	38	3	0	0	41
2021	42	3	0	0	45

Total Employment

	SMALL 1-24	MEDIUM 25-99	LARGE 100+	UNKNOWN	TOTAL
2019	254	101	0	0	355
2020	254	101	0	0	355
2021	272	101	0	0	373

Average Employment

	SMALL 1-24	MEDIUM 25-99	LARGE 100+	UNKNOWN	TOTAL
2019	7	34	0	0	9
2020	7	34	0	0	9
2021	6	34	0	0	8

Employment

The Establishments by Employment Class table displays the all market area industry operations. Projected employment of operations for which employment cannot be ascertained (Unknown) are based on average industry site employment in the market area.

Productivity

Values

Sales Per Employee (\$)				
	2019	2020	2021	JUNE-2022 TTM
US	208,446	212,563	219,526	232,669
Market Area	209,133	213,264	220,249	233,435
Midstreet Capital LLC	1,996	2,183	2,110	230,087

Average Annual Wage (\$)				
	2019	2020	2021	JUNE-2022 TTM
US	63,117	59,562	61,916	62,300
Market Area	66,636	62,961	65,450	65,855
Midstreet Capital LLC	45,643	44,356	43,456	44,857

Rent Per Employee (\$)				
	2019	2020	2021	JUNE-2022 TTM
US	3,814			4,257
Market Area	3,826			4,271
Midstreet Capital LLC	707	683	682	684

Competitive Market Narrative				
<p>Midstreet Capital LLC sales per employee are \$199,598, -9% above the local industry market level, compared to a -9% differential against the national average. At \$45,643, average annual firm wages are 30.69% below the local industry market average and lower than the Plumbing, Heating, Air Conditioning Contractors segment nation-wide. Midstreet Capital LLC Rent per Employee, an expense-specific efficiency metric, is \$707, while the average industry market rent per employee figure is \$4,271.</p>				

Index/Chart

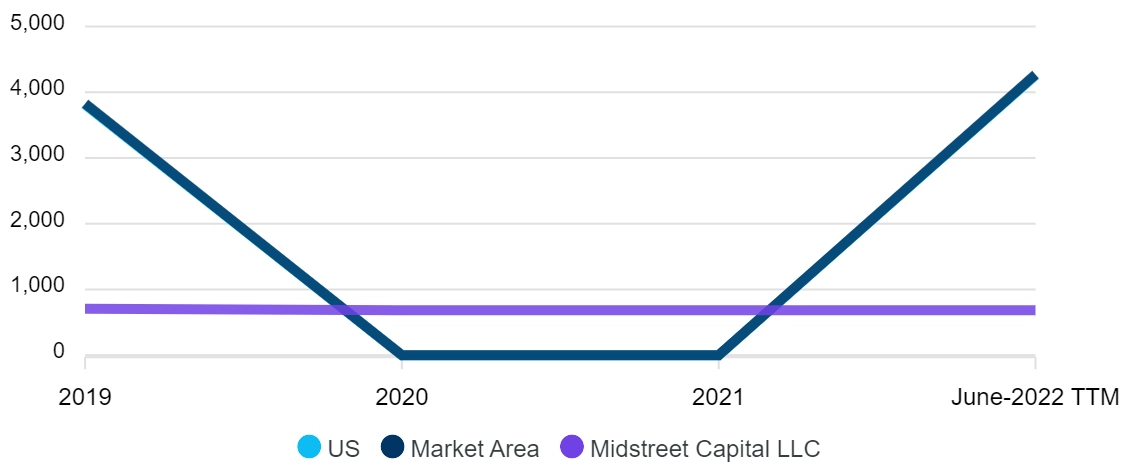
ABC Plumbing Competitive Productivity Analysis

Midstreet Capital LLC sales per employee are \$199,598, -9% above the local industry market level, compared to a -9% differential against the national average.

Productivity Indices

	2019	2020	2021	JUNE-2022 TTM
US Sales per Employee Index	-99%	-99%	-99%	+5%
Market Area Sales per Employee Index	-99%	-99%	-99%	+4%
US Efficiency Index	-99%	-99%	-99%	+48%
Market Area Efficiency Index	-99%	-98%	-99%	+56%

Sales Per Employee (\$)



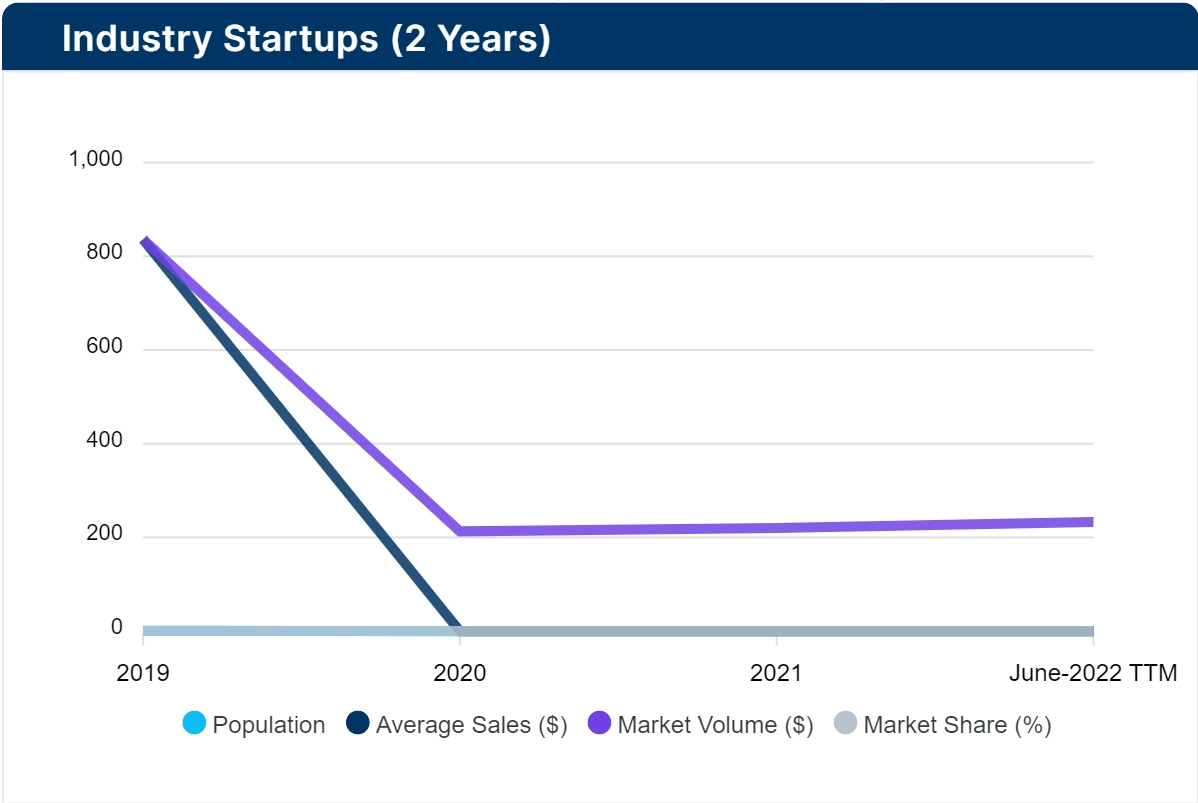
Competitive Market Narrative

The Efficiency Index divides sales per employee by average annual worker salary to yield an overall efficiency metric expressed as a percentage above or below the industry in the benchmarked area. Non-wage factors may also affect efficiency but are not represented by this index. Sales per Employee levels are a common efficiency indicator calculated outside of traditional financial ratio metrics. Industry average sales per employee in this market area are calculated at \$233,435, above the US industry average of \$232,669. (Value-added differentials can significantly affect sales per employee variations.) Average market area industry wage levels are \$65,855, ahead of the US level of \$62,300. In a separate, targeted efficiency benchmark, local industry market Rent per Employee is calculated at \$4,271, compared to the US per employee rate of \$4,257.

Startups

Values

Startup Performance (Firms)				
	2019	2020	2021	JUNE-2022 TTM
Population	1	0	0	0
Average Sales (\$)	836,532	0	0	0
Market Volume (\$)	836,532	213,264	220,249	233,435
Market Share (%)	1.13	0.28	0.27	0.27

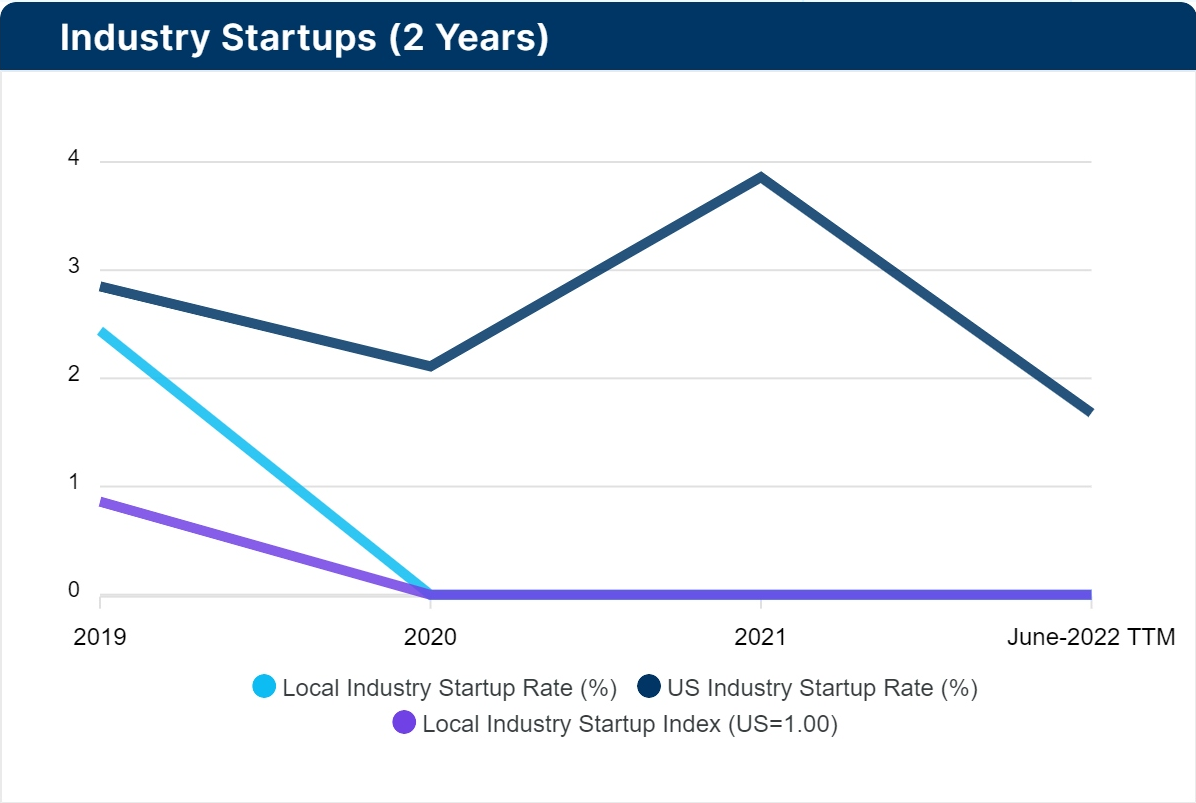


Competitive Market Narrative

How vigorous is industry entrepreneurship in the market area? Defined as operations in business for two years or less, 0 independent industry startups and new branch operations were identified in the market area in June-2022, creating a new operation rate of 0.00% in the most recent analysis year, less than the national rate of 1.68%. Unusually low new operation rates can indicate market saturation or lack of perceived opportunity, while high rates suggest both opportunity and the recognition of it. Startup rates are calculated by dividing the number of industry market startups by the total number of operations for which an age is known. (Due to the limited number of new operations at any given time, this indicator may be less useful in small local market areas.) Industry startup operations hold a 0.27% share of the total local industry market, with average sales of \$0. Due to the variations in scale, startup sales often diverge from the industry and small business average.

Index/Chart

Startup Activity Rates (Firms And Branches)				
	2019	2020	2021	JUNE-2022 TTM
Local Industry Startup Rate (%)	2.44	0.00	0.00	0.00
US Industry Startup Rate (%)	2.85	2.11	3.86	1.68
Local Industry Startup Index (US=1.00)	0.86	0.00	0.00	0.00



Competitive Market Narrative

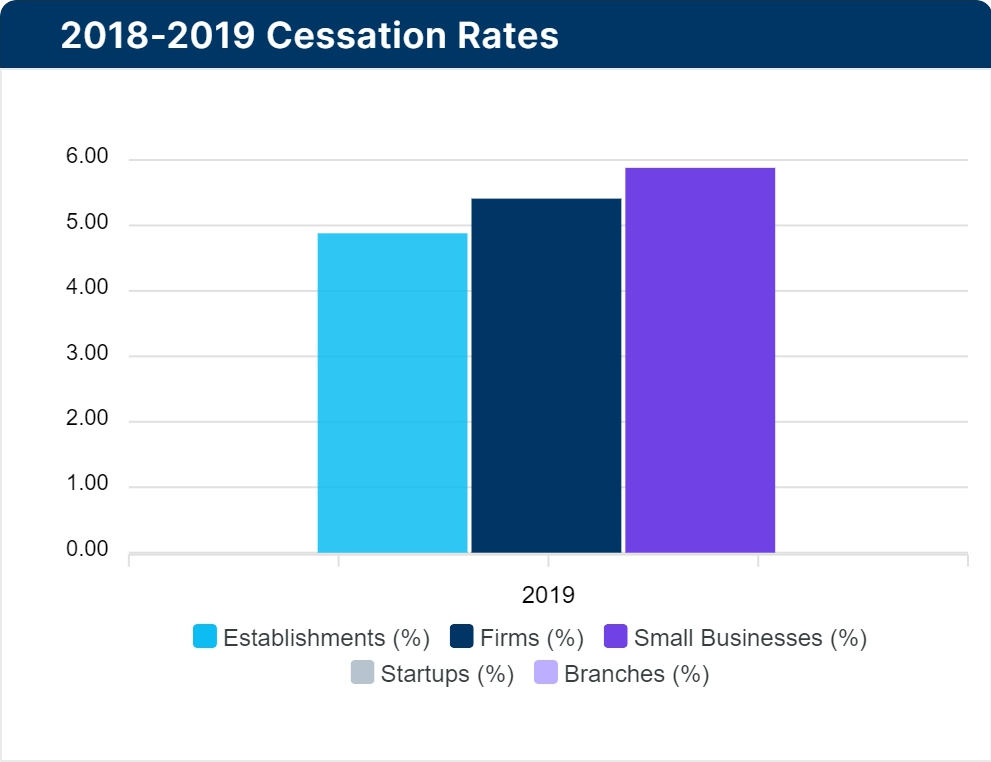
How vigorous is industry entrepreneurship in the market area? Defined as operations in business for two years or less, 43 independent industry startups and new branch operations were identified in the market area in October 2017, creating a new operation rate of 6.03% in the most recent analysis year, less than the national rate of 6.06%. Unusually low new operation rates can indicate market saturation or lack of perceived opportunity, while high rates suggest both opportunity and the recognition of it.

Startup rates are calculated by dividing the number of industry market startups by the total number of operations for which an age is known. (Due to the limited number of new operations at any given time, this indicator may be less useful in small local market areas.)

Industry startup operations hold a 7.68% share of the total local industry market, with average sales of \$1,718,359. Due to the variations in scale, startup sales often diverge from the industry and small business average.

Cessation

2020-2021 Cessation Rates	
	2019
Establishments (%)	4.88
Firms (%)	5.41
Small Businesses (%)	5.88
Startups (%)	0.00
Branches (%)	0.00

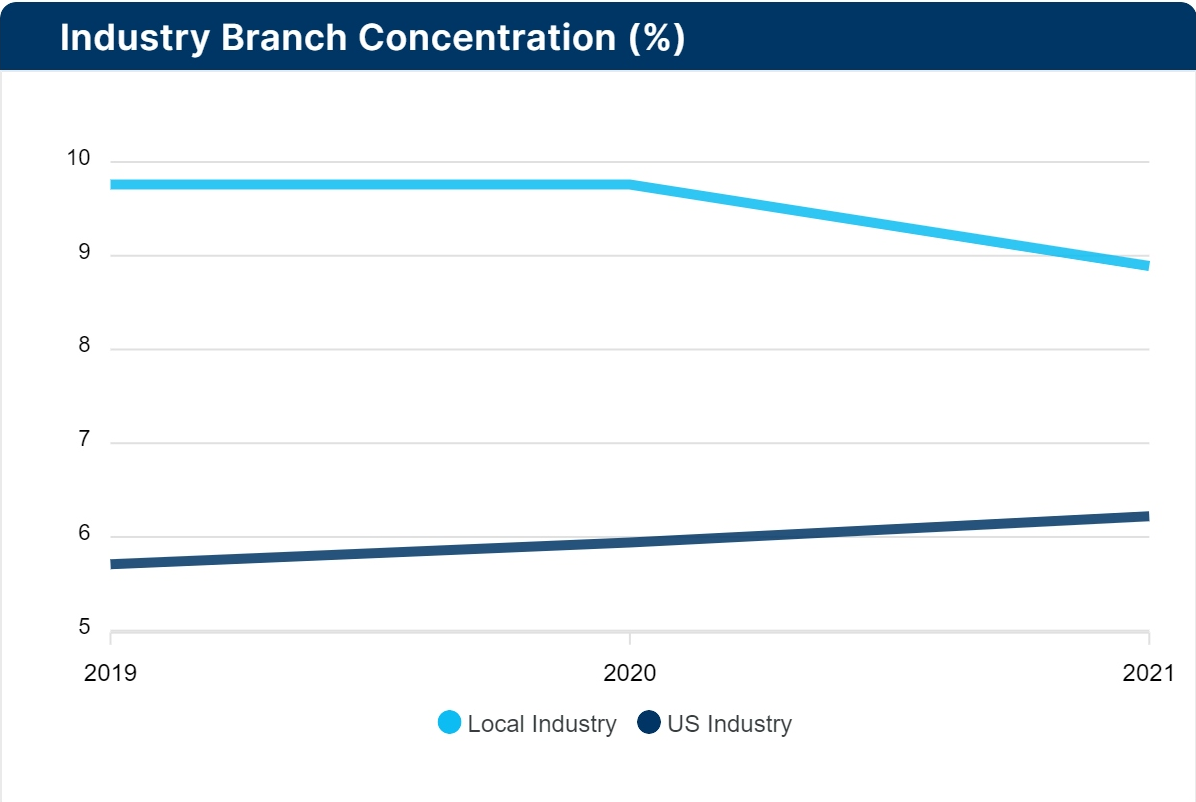


Competitive Market Narrative

Over 2020-2021, 4.88% of industry establishments (firms and branches), 5.41% of all firms and 5.88% in the industry small business segment ceased operation.

Ownership

Industry Branch Concentration (%)			
	2019	2020	2021
Local Industry	9.76	9.76	8.89
US Industry	5.71	5.94	6.22



Competitive Market Narrative

Is the Plumbing, Heating, Air Conditioning Contractors industry becoming subject to outside ownership decisions that could affect the market area? Are local entrepreneurs being squeezed out by franchises or branch operations?

The analysis includes an indication based on the percentage of industry branch operations as a barometer of relative consolidation trends. Increasing branch levels may indicate long-term pressure on area entrepreneurship. In this industry market, the percentage of branch operations has decreased over the last three years and stands at 8.89. At 6.22, national industry consolidation rates are lower and have increased from 2019.

Market Area Demographics - 2020 American Community Survey

Total Population

Total population	80,351	100.00%
Male	40,284	50.14%
Female	40,067	49.86%

Age

5-9 Years	4,401	5.48%
10-14 Years	4,621	5.75%
15-19 Years	3,990	4.97%
20-24 Years	4,357	5.42%
25-34 Years	12,530	15.59%
35-44 Years	10,448	13.00%
45-54 Years	10,738	13.36%
55-59 Years	5,766	7.18%
60-64 Years	4,717	5.87%
65-74 Years	7,721	9.61%
75-84 Years	4,866	6.06%
85-plus Years	3,042	3.79%
Median Age	40	

Race / Ethnicity

White	68,369	85.09%
Hispanic (all races)	3,883	4.83%
African American	4,337	5.40%
Native American	87	0.11%
Asian	3,334	4.15%
2-plus Races	3,230	4.02%

Employment

Population: 16-plus Years	66,618	100.00%
Labor force	41,848	62.82%
Civilian Labor Force	41,758	62.68%
Civilian employment	40,464	60.74%
Unemployed	1,294	1.94%
Work at Home	3,639	
Total Commuters	36,175	100.00%
Commute < 15 Minutes	11,766	32.53%
Commute 15-29 Minutes	16,474	45.54%
Commute 30-44 Minutes	5,308	14.67%
Commute 45-89 Minutes	1,849	5.11%
Commute > 90 Minutes	778	2.15%

Income

Total households	32,701	100.00%
Below \$10k Income	960	2.94%
\$10k-14.9k Income	874	2.67%
\$15k-24.9k Income	1,960	5.99%
\$25k-34.9k Income	2,707	8.28%
\$35k-49.9k Income	4,014	12.27%
\$50k-74.9k Income	5,549	16.97%
\$75k-99.9k Income	5,231	16.00%
\$100k-149.9k Income	6,142	18.78%
\$150k-199.9k Income	3,031	9.27%
>\$200k Income	2,233	6.83%
Median HH Income (\$)	73,482	
Mean HH Income (\$)	72,928	
Per Capita Income (\$)	40,815	

Education

Population 25+ Years	59,828	100.00%
High School Graduate	16,974	28.37%
Some College/Associate's Degree	14,096	23.56%
Bachelor's degree	15,592	26.06%
Graduate/Professional degree	9,046	15.12%
% High School Graduate or Higher (total)	55,708	93.11%
% Bachelor's Degree or Higher (total)	24,638	41.18%

Housing

Total Housing Units	34,411	100.00%
Occupied Housing Units	32,701	95.03%
Type of Housing		
1 Unit Detached Housing Structures	20,430	59.37%
1 Unit Attached Housing Structures	5,194	15.09%
2 Unit Housing Structures	1,130	3.28%
3-4 Unit Housing Structures	1,629	4.73%
5-9 Unit Housing Structures	1,454	4.23%
10-19 Unit Housing Structures	1,661	4.83%
20-plus Unit Housing Structures	2,518	7.32%
Mobile Home Housing Units	395	1.15%
Boat-RV-Van Housing Units	0	0.00%

Age of Housing		
Housing Built 2010 or Later	2,509	7.29%
Housing Built 2000-2009	3,255	9.46%
Housing Built 1990-1999	2,826	8.21%
Housing Built 1980-1989	3,552	10.32%
Housing Built 1970-1979	5,128	14.90%
Housing Built 1960-1969	5,403	15.70%
Housing Built 1950-1959	5,114	14.86%
Housing Built 1940-1949	1,727	5.02%
Housing Built 1939 or Before	4,897	14.23%
Occupants per Unit		
Units with less than 1 Occupant Per Room	16,067	46.69%
Units with 1.1-1.5 Occupants Per Room	70	0.20%
Units with 1.51-plus Occupants Per Room	10	0.03%

Median Value of Owner Occupied Units (\$)	205,643	
Owner Occupied Units: Value < \$50k	356	1.63%
Owner Occupied Units: Value \$50k-\$99.9k	744	3.41%
Owner Occupied Units: Value \$100k-\$149.9k	3,377	15.47%
Owner Occupied Units: Value \$150k-\$199.9k	6,000	27.48%

Owner Occupied Units: Value \$200k-\$299.9k	6,519	29.86%
Owner Occupied Units: Value \$300k-\$499.9k	4,075	18.67%
Owner Occupied Units: Value \$500k-\$999.9k	696	3.19%
Owner Occupied Units: Value >\$1 Million	64	0.29%
Owner-Occupied Units with Mortgage	14,246	65.26%
Owner-Occupied Units without Mortgage	133	0.61%

Occupied Units Paying Rent	10,870	100.00%
Median Rent Paid	1,078	
Occupied Units Paying <\$500 Rent	712	6.55%
Occupied Units Paying \$500-\$999 Rent	3,817	35.11%
Occupied Units Paying \$1000-\$1499 Rent	4,426	40.72%
Occupied Units Paying \$1500-\$1999 Rent	1,231	11.32%
Occupied Units Paying \$2000-\$2499 Rent	161	1.48%
Occupied Units Paying \$2500-\$3000 Rent	106	0.98%
Occupied Units Paying \$3000 or More Rent	89	0.82%
Rent Paid < 15% of Income (Households)	1,646	15.14%
Rent Paid 15%-19.9% of Income (Households)	1,538	14.15%
Rent Paid 20%-24.9% of Income (Households)	1,489	13.70%
Rent Paid 25%-29.9% of Income (Households)	1,544	14.20%
Rent Paid 30%-34.9% of Income (Households)	1,090	10.03%
Rent Paid 35%-plus of Income (Households)	3,159	29.06%

Competitive Market Narrative

This competitive industry market area analysis includes the Zip Code 17011,17043,17055. In June-2022, the market area economy supports a total private sector business base of 9999999999999999 local operations. Total population in the market area is 80,351 including 32,701 households with a median age of 40. 41.18% of the population boasts a bachelor's degree or higher; another 23.56% holds an associate degree. Median housing value in the market area is \$205,643, while the median rent level is \$1,078 per month. Per capita income in the market area is \$40,815, while average (mean) household income is \$72,928 and median household income is \$73,482. 34.88% of market area households earn over one hundred thousand dollars per year. Population demographics are applied from the Census Bureau's American Community Survey. Data for zip-county-metro-state and US markets are applied directly. Demographic totals for radius-based markets are applied at the level of aggregated zip codes which are co-joined to the selected market radius.

Demographics

Population demographics are applied from the Census Bureau's American Community Survey. Data for zip-county-metro-state and US markets are applied directly. Demographic totals for radius-based markets are applied at the level of aggregated zip codes which are co-joined to the selected market radius. Elements of this data are also integrated into our Sales per Person and Sales per Household calculations displayed on the Penetration>Table tab.