INDUSTRIAL PATTERNS

Add-On Density Atlas

Building Materials · Second Edition

Module 3 · Industrial Patterns Reference Series

An annual, descriptive atlas of the geographic structure of US building-materials industries — where establishments are concentrated and how that footprint is changing — computed from primary federal statistical data at the county level.

Cross-section: County Business Patterns 2023. Trend window: 2019–2023, comparable-cell panel.
Coverage floor: 55% · Mapped unit: establishment · Boundaries: 2021.

FREE SAMPLE — SEGMENT 1 ONLY

This sample contains the front-matter (How to read · Scope · Peer definition · Glossary), the full Segment 1 — Construction-materials distribution — including its density map, trend map, and code tables, and the methodology appendix. The full edition contains the remaining four segments (Nonmetallic Mineral · Wood · Fabricated Metals · Plastics) and the complete coverage and tier index.

Published by Green Shoot Research, a division of Green Shoot Capital Corp. · Calgary, Alberta, Canada

How to read this atlas

This document is an atlas, not a report. It maps where the universe of establishments in each Building Materials industry sits across the United States, and how that geography has drifted over five years. It is built to be used the way a buy-and-build investor uses it: find a segment, read its density and trend at a glance from the maps, then drop to the code tables to see the specific counties for a specific NAICS code.

Each segment is presented in three modalities that do different jobs. A short narrative states what the geography shows. Two maps show it: a density map of where establishments concentrate today, and a trend map of where the base has grown or shrunk. A set of code tables then gives the county-level detail for every six-digit NAICS code in the segment — the layer for a reader who has a specific code in mind.

How to read these maps

Density maps use graduated circles. A circle's area is proportional to the number of establishments in that county — a larger circle means more potential targets in that market. Only counties with published establishments are drawn.

Trend maps use a diverging color scale. Burgundy marks a net decline in establishments over the window, navy a net gain, and pale counties indicate little change. Change is measured only on the comparable-cell panel — counties published in all five years — so a county appearing or disappearing at the disclosure threshold is never read as real movement.

Tables carry four numbers per county: the raw establishment count; that county's share of the national total for the code; intensity, shown as “per 1k local” (establishments per 1,000 of all business establishments in the county); and the five-year net change in establishments. Navy values are growth, burgundy values are decline; “—” marks a county not on the comparable-cell panel.

Coverage and tier. Each code is mapped at the finest geography that meets a coverage threshold; codes too sparse for an honest county map are shown at their four-digit subsector or deferred to the Industry Structure Reference. “Counties published” excludes the small cells the Census withholds for disclosure.

Don't sum across tiers. Where both a four-digit subsector and one of its six-digit codes clear the floor, each gets its own table; the subsector table already contains the six-digit code's establishments, so totaling tables within a segment would double-count.

Descriptive, not prescriptive. The maps describe where the universe of establishments is. They are not a recommendation of where to locate, expand, or acquire.

Scope and intended use

What this is. An annual, descriptive atlas of the geographic structure of US building-materials industries. It is intended for diligence teams, operators, and advisors mapping the fragmented universe of potential platform and add-on targets in a specific NAICS code.

What this is not. It is not investment advice, not a forecast, and not a valuation. It maps the location and density of the establishment universe; it does not identify named companies, transactions, ownership, or which markets to enter or acquire. Establishment counts are the published universe of physical locations, not firms or platforms — multi-location operators appear as multiple establishments. Figures are point-in-time at the edition's data vintage and are not revised once an edition ships.

Peer definition and methodology summary

The peer set is the Building Materials universe shared with the Operating Benchmarks and Industry Structure Reference: 47 six-digit NAICS codes across five structural segments — construction-materials distribution, nonmetallic mineral manufacturing, wood product manufacturing, fabricated and architectural metals, and plastics product manufacturing.

Source and unit. All maps are computed from the US Census Bureau County Business Patterns (CBP). The mapped measure is the establishment count, which CBP publishes exactly at county level; employment and payroll, which CBP noise-infuses, are not mapped. The unit of analysis is the establishment — a physical location — because the firm-level federal source (SUSB) does not resolve below the state.

Geography and tiering. Each code is mapped at the finest geography × NAICS level whose published counties cover at least 55% of the national establishment count: county six-digit where it clears that floor, the four-digit subsector where it does not, and state level (in the Industry Structure Reference) where even the subsector is too sparse to map honestly.

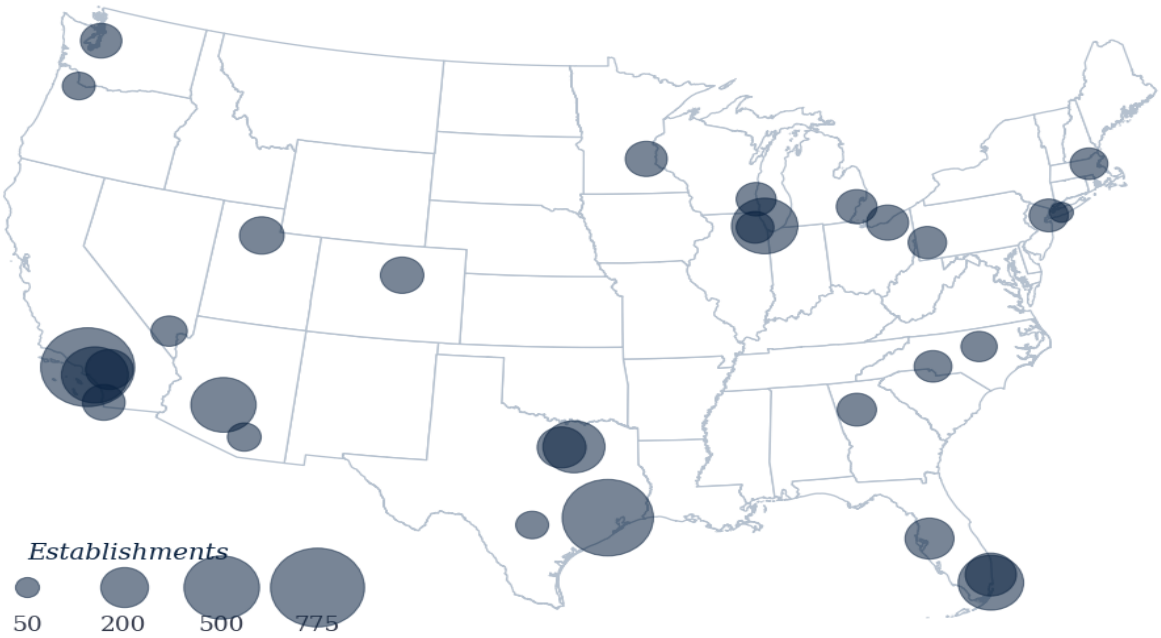
Cross-section and trend. Each edition presents the current-year cross-section and a five-year trailing drift layer (this edition, 2019–2023), computed on the comparable-cell panel so that disclosure-threshold flicker is not mistaken for change.

Segment 1 — Construction-materials distribution

Construction-materials distribution numbers roughly 27,013 establishments nationally. Of these, 22,839 — 85% — sit in the counties CBP publishes at this granularity and form the universe mapped here; the remainder fall in small county cells the Census withholds for disclosure. The segment is the channel through which lumber, brick, roofing, other construction materials, and metal and mineral products reach builders and contractors, and the segment a building-products roll-up most often platforms first.

The footprint is broadly national: establishments appear in 789 of roughly 3,100 US counties, the densest counts in Los Angeles, CA (775); Harris, TX (731); Orange, CA (393); Cook, IL (387). Of the segment's 6 six-digit codes, 5 map at full county detail and the rest at their subsector level or, where too sparse, in the Industry Structure Reference.

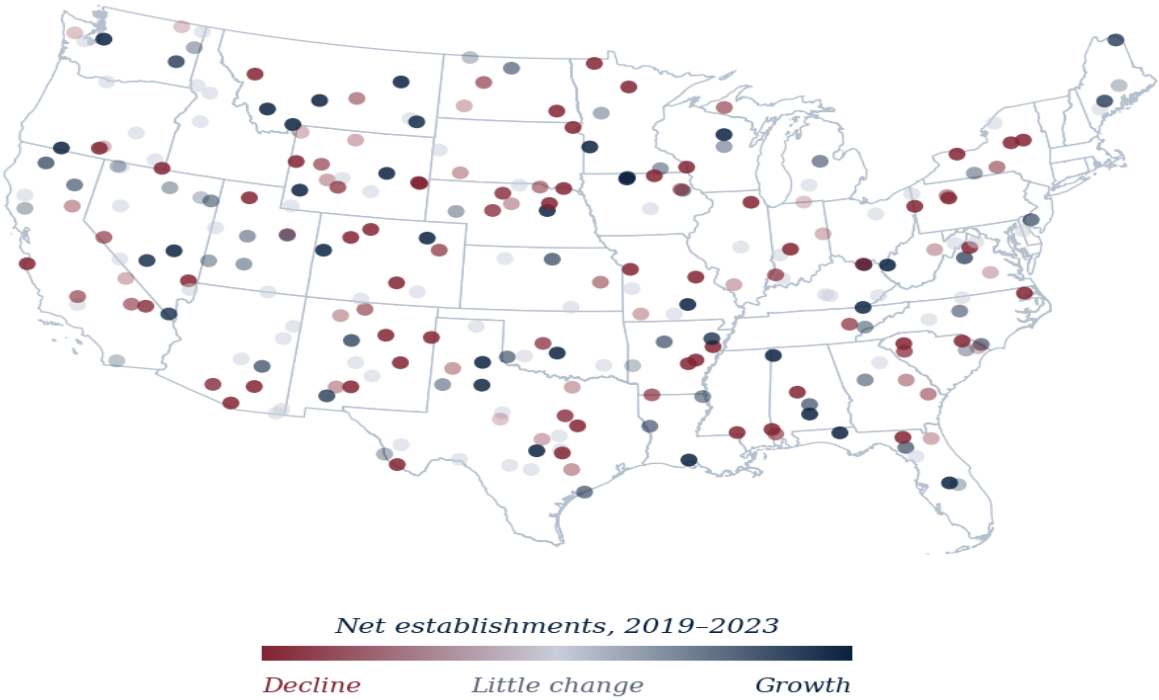
Over 2019–2023 the base held essentially flat (-0.9%), from 23,055 to 22,839. Most counties barely moved; geographic structure of this kind shifts over years, not quarters.



Density — establishments per county, 2023. Circle area ∝ establishment count; only counties with published establishments shown.

Segment 1 — Trend, 2019–2023

Change is computed on the comparable-cell panel: only counties published in every window year contribute. A county appearing or disappearing at the disclosure threshold is not read as movement.



Change — net establishments 2019–2023, comparable-cell panel. Burgundy = decline, navy = growth, pale = little change.

The change map shows the slow character of geographic structure: most counties moved little, and net change clustered in a minority of markets. The geography a buy-and-build strategy reads as where the universe is thinning or filling, not as momentum.

Segment 1 — Code tables

For each mapped code: the densest counties by establishment count, with the county's national share, its intensity per 1,000 local establishments, and its net establishment change over 2019–2023 (navy = growth, burgundy = decline; "—" where a county is not on the comparable-cell panel).

NAICS 423310 — Lumber, plywood, millwork, and wood panel merchant wholesalers

Tier: county6 · counties published: 525 · coverage 86%

Rank	County	Estabs	Share	per 1k local	5-yr Δ
1	Los Angeles, CA	195	2.8%	0.6	+10
2	Harris, TX	106	1.5%	1.0	–5
3	Miami-Dade, FL	94	1.3%	1.0	0
4	Orange, CA	91	1.3%	0.9	+1
5	Maricopa, AZ	90	1.3%	0.8	+8
6	King, WA	85	1.2%	1.2	–6
7	Dallas, TX	75	1.1%	1.1	–6
8	San Bernardino, CA	66	0.9%	1.6	+4
9	Cook, IL	62	0.9%	0.5	–11
10	San Diego, CA	61	0.9%	0.7	+13
11	Kings, NY	60	0.9%	1.0	+1
12	Tarrant, TX	57	0.8%	1.2	+3

NAICS 423320 — Brick, stone, and related construction material merchant wholesalers

Tier: county6 · counties published: 327 · coverage 80%

Rank	County	Estabs	Share	per 1k local	5-yr Δ
1	Harris, TX	105	2.8%	0.9	–2
2	Miami-Dade, FL	92	2.5%	0.9	+27
3	Los Angeles, CA	77	2.1%	0.3	+1
4	Dallas, TX	70	1.9%	1.0	–6
5	Maricopa, AZ	65	1.7%	0.6	+4
6	Orange, CA	63	1.7%	0.6	+10
7	Cook, IL	50	1.3%	0.4	–2
8	King, WA	43	1.2%	0.6	–1
9	Suffolk, NY	34	0.9%	0.7	+1

10	Clark, NV	34	0.9%	0.6	–1
11	San Diego, CA	33	0.9%	0.4	+6
12	Hillsborough, FL	32	0.9%	0.7	+10

Segment 1 — Code tables (continued)

NAICS 423330 — Roofing, siding, and insulation material merchant wholesalers

Tier: county6 · counties published: 383 · coverage 82%

Rank	County	Estabs	Share	per 1k local	5-yr Δ
1	Harris, TX	54	1.5%	0.5	+2
2	Los Angeles, CA	50	1.4%	0.2	–7
3	Maricopa, AZ	39	1.1%	0.4	+2
4	Dallas, TX	35	1.0%	0.5	–4
5	Cook, IL	33	0.9%	0.2	–7
6	Orange, CA	32	0.9%	0.3	+4
7	Miami-Dade, FL	28	0.8%	0.3	–1
8	Orange, FL	28	0.8%	0.6	–2
9	Bexar, TX	27	0.8%	0.7	+2
10	Tarrant, TX	25	0.7%	0.5	–1
11	Hillsborough, FL	25	0.7%	0.6	+5
12	Broward, FL	24	0.7%	0.4	+3

NAICS 423390 — Other construction material merchant wholesalers

Tier: county6 · counties published: 340 · coverage 82%

Rank	County	Estabs	Share	per 1k local	5-yr Δ
1	Los Angeles, CA	101	2.7%	0.3	+9
2	Harris, TX	79	2.1%	0.7	–3
3	Miami-Dade, FL	63	1.7%	0.6	+3
4	Maricopa, AZ	61	1.6%	0.6	+13
5	Dallas, TX	58	1.5%	0.8	+2
6	Orange, CA	53	1.4%	0.5	+3
7	Broward, FL	45	1.2%	0.7	+1
8	Queens, NY	39	1.0%	0.8	+7
9	Cook, IL	38	1.0%	0.3	–2
10	Tarrant, TX	37	1.0%	0.8	+3
11	King, WA	32	0.9%	0.5	–6
12	San Diego, CA	32	0.9%	0.3	–8

Segment 1 — Code tables (continued)

NAICS 4235 — Metal and mineral (except petroleum) merchant wholesalers

Tier: county4 · counties published: 579 · coverage 89% · four-digit subsector; also shown separately at six-digit: 423510

Rank	County	Estabs	Share	per 1k local	5-yr Δ
1	Harris, TX	387	4.4%	3.5	+14
2	Los Angeles, CA	352	4.0%	1.2	–50
3	Cook, IL	204	2.3%	1.5	–51
4	Orange, CA	154	1.7%	1.4	–9
5	Maricopa, AZ	119	1.3%	1.1	+13
6	Cuyahoga, OH	105	1.2%	3.3	–12
7	Dallas, TX	100	1.1%	1.4	–8
8	Miami-Dade, FL	99	1.1%	1.0	+4
9	San Bernardino, CA	98	1.1%	2.3	–2
10	Allegheny, PA	80	0.9%	2.4	–8
11	Tarrant, TX	70	0.8%	1.5	–4
12	Wayne, MI	66	0.7%	2.0	–9

NAICS 423510 — Metal service centers and other metal merchant wholesalers

Tier: county6 · counties published: 562 · coverage 89%

Rank	County	Estabs	Share	per 1k local	5-yr Δ
1	Harris, TX	376	4.4%	3.4	+14
2	Los Angeles, CA	341	4.0%	1.1	–45
3	Cook, IL	201	2.3%	1.5	–51
4	Orange, CA	151	1.8%	1.4	–11
5	Maricopa, AZ	117	1.4%	1.1	+12
6	Cuyahoga, OH	102	1.2%	3.2	–10
7	Dallas, TX	98	1.1%	1.4	–8
8	San Bernardino, CA	97	1.1%	2.3	–2
9	Miami-Dade, FL	96	1.1%	1.0	+4
10	Allegheny, PA	71	0.8%	2.1	–8
11	Tarrant, TX	67	0.8%	1.4	–5
12	Wayne, MI	66	0.8%	2.0	–9

Methodology appendix

Source and measure

County Business Patterns (CBP), US Census Bureau. The mapped measure is the establishment count, published exactly at the county level. Employment and payroll are noise-infused by CBP and are not mapped. CBP withholds whole county cells for disclosure when an industry has very few establishments in a county; published counts are exact, and the withheld cells are the smallest, which the coverage statistic records.

Unit of analysis

The establishment — a single physical location. The firm-level source (Statistics of U.S. Businesses) does not resolve below the state, so county density is necessarily establishment-based; firm- and platform-level structure is the domain of the Industry Structure Reference.

Coverage-floor tiering

Each code is mapped at the finest geography × NAICS level whose published counties cover at least 55% of its national establishment count — county six-digit, then four-digit subsector, then state. A map below the floor is not published at county level; the threshold is a disclosure-integrity rule, not a stylistic choice.

Cross-section and trend

Cross-section: CBP 2023. Trend: a five-year trailing window (2019–2023), rolling forward one year per edition, computed on the comparable-cell panel — county cells published in every window year. Establishment counts are not deflated; they are counts, not currency.

Limitations

This atlas maps establishments, not firms or platforms: a multi-location operator appears as multiple establishments, and the consolidation a buyer is tracking — which firm owns which locations — is not visible in federal data and is not claimed here. Coverage bounds what can be mapped honestly: thin codes are shown at coarser geography or deferred, and that choice is disclosed at the point of use. The trend is geographic drift measured over five years, not a forecast.

Within those bounds, the atlas does one thing well: it shows, county by county, where the universe of building-materials establishments sits and how that footprint is shifting — the map a buy-and-build strategy needs before it has named a single target.

What the full edition contains

The Second Edition runs the full Building Materials peer set across five segments. This sample shows Segment 1 in its entirety; the complete edition adds:

Segment 2	Nonmetallic mineral manufacturing	8,401 estabs published · 18 codes
Segment 3	Wood product manufacturing	6,690 estabs published · 14 codes
Segment 4	Fabricated and architectural metals	10,097 estabs published · 7 codes
Segment 5	Plastics product manufacturing	453 estabs published · 2 codes

Plus the complete coverage and tier index (every six-digit code with national count, counties published, county coverage, and resulting mapping tier), and the Terms of Sale and licensing section.

Available at industrialpatterns.com

Sold as a single-organization license. Pricing and bundle options on the product page.

Sample notice

This document is a free sample of the Add-On Density Atlas — Building Materials — Second Edition. It is provided for evaluation only. Redistribution outside the recipient's organization is permitted for evaluation purposes; commercial use, derivative works, and AI/ML training are prohibited. The full edition is licensed under the Industrial Patterns Terms of Sale.

Sources of the full edition

U.S. Census Bureau — County Business Patterns (CBP), 2019 and 2023 vintages; 2021 cartographic county boundaries.

Cross-references

Operating Benchmarks — Building Materials editions: distributional benchmarks on margin behavior, labor elasticity, capital efficiency, and scale across the same peer set.
Industry Structure Reference — Building Materials First Edition: concentration, scale distribution, entry/exit, supply-chain density across the same peer set.

Published by Green Shoot Research, a division of Green Shoot Capital Corp. · Calgary, Alberta, Canada
industrialpatterns.com · © 2026 Green Shoot Capital Corp.