DIGITAL COMMERCE 360 B2B

KEY FINDINGS FROM THE 2021

DISTRIBUTOR 300

REPORT

Data and analysis on how U.S. distributors and wholesalers will drive growth today and post-COVID-19 through digital commerce.

OCTOBER 2021

Compliments of

Amplience

CONTENTS

A HEADLESS APPROACH TO B2B ECOMMERCE HELPS IMPROVE CUSTOMER EXPERIENCES

Alison Williams,
business development director, Amplience

B2B businesses today want to control the customer journey and sell directly to end customers, which has required them to set up their own distribution networks. While this has allowed them to own the customer relationships and drive more brand presence, companies often struggle to offer customers the B2C-like experience they expect, while navigating the many B2B complexities. To discuss how new technologies can help B2B businesses extend their digital offering and drive meaningful customer experiences as their distribution networks evolve, Digital Commerce 360 B2B spoke with Alison Williams, business development director at Amplience.

DC360: What typical distribution challenges are B2B companies currently facing?

Williams: As businesses go direct to customers (D2C), they're challenged to replicate the offerings customers expect in a B2C world while dealing with the different complexities of B2B. For example, with B2B buyers expecting to check out online with ease just as they would on a B2C site, B2B businesses need to have the right technology in place to support a B2B customer experience, such as quotes, account-based pricing structures, credit lines and purchase approvals.

DC360: How have B2B companies typically handled these challenges?

Williams: Typically, they add point-solutions or bespoke technologies to "fix" a specific problem. For larger manufacturers, this might be adding a new ERP system to support a new product line. Consumer goods organizations build siloed ecommerce stacks to support the specific needs for a single brand. And multi-segment organizations that sell across industries often introduce complex account management solutions to allow buyers to purchase products across each channel more easily.

These point solutions may solve a specific distribution problem, but they often cause more work and complexity downstream and create a subpar customer experience.

DC360: What new technologies are available to help B2B companies better handle distribution?

Williams: A headless approach to their technology helps B2B businesses piece together best-of-breed solutions in order to offer the connected digital experiences they want across any number of channels. It gives them the flexibility they need to equate all the different needs of their business and their customers.

For example, they can configure shipping and distribution vendors, different payment vendors and their content management system so they're all connecting to their product information management system and their ERP. This allows for much easier management and publishing of data and content, and a more streamlined and enriched end-to-end purchasing experience. A headless approach also allows businesses to control their brand presence even further and deliver contextual content to buyers throughout the buying cycle to support their purchase.

DC360: How can companies implement this headless approach to their technology?

Williams: They can partner with a technology provider like Amplience. By leveraging Amplience's headless platform, B2B businesses can more easily spin up front ends and storefronts to suit their D2C needs, change out branding to suit the end consumer, and add customer-facing tools quickly without affecting other B2B systems and processes.

Unlocking

B2B CUSTOMER EXPERIENCES

Slatwall Commerce & Amplience B2B Report

A look at changes affecting B2B, and why digital adoption and a new approach to content and commerce experiences are now a must for any B2B business.

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EXECUTIVE SUMMARY

DIGITAL ECOMMERCE IS A GAME CHANGER FOR U.S. DISTRIBUTION

There is no “new normal” for U.S. distributors—at least when it comes to digital commerce.

In the last two years, the pandemic literally altered the course of how distributors and wholesalers do business. What was once a world of mail, fax, e-mail, face-to-face sales, and manual orders has morphed into a world where nearly all aspects of business are digitally driven.

Business buyers now want more—and not less—ways to purchase corporate goods and services online. And that demand is placing a big burden on distributors to accelerate B2B ecommerce, finally start the process for building and executing an ecommerce strategy, or risk losing market share or even going out of business.

After a highly volatile 2020, distributors are generating solid sales both online and offline in 2021. Based on an analysis of data from the U.S. Department of Commerce, Digital Commerce 360 projects that total 2021 distributor and wholesaler sales are on track to grow by about 15% to $6.644 trillion from $5.798 trillion in 2020.

Total distributor ecommerce sales are projected to grow year over year by 17% and top $1.12 trillion, up from $957.0 billion in 2020 B2B ecommerce. “It’s my hope distributors have learned that we are on the brink of a tipping point in B2B,” says Jay Schneider, a B2B ecommerce analyst and founder of ecommerce consulting firm B2B Squared in Brookfield, Wis. “The leaders in digital customer experience will be in the best position—those who haven’t properly committed to the journey are at huge risk.”

Distributors of all sizes are mixing and matching ecommerce strategies and introducing new tools and services to drive growth online. For example, at Watsco Inc., a big distributor of heating, ventilation, and air conditioning (HVAC) products, total and ecommerce sales show steady growth.

While Watsco's total 2020 sales grew by 6% year over year to more than $5 billion, ecommerce grew even faster by 10% to $1.530 billion from $1.39 billion in 2019.

Watsco is a prime example of how many distributors of all sizes are changing with the times and putting ecommerce on a faster track. Business buyers are demanding quicker, better, and more user-friendly digital commerce sales channels to research and purchase both straightforward and complicated products.

How are distributors and wholesalers responding? The answer is mixed. The data and analysis in the 2021 B2B Distributor 300 show just how far this segment of B2B ecommerce has progressed—and how far it still must go.

OVERVIEW

OVERVIEW

DRIVING TOWARD A TIPPING POINT IN B2B ECOMMERCE

As distributors deal with ongoing challenges of market disruption, many are diving deeper into digital commerce to take advantage of the shift toward digital transformation.

It's been a long road back digitally and otherwise for U.S. distributors for much of the past two years.

In the last 18 months, the ongoing impact of the COVID-19 pandemic, which literally shuttered manufacturing activity in some industries and drastically slowed productivity in others, has caused major—and permanent—shifts in how distributors and wholesalers conduct business.

Fading fast are the days when most sales will be handled offline strictly by phone, fax, e-mail, and manual order processing. Ecommerce and digital transformation are replacing those traditional methods in a broad shift driven by a younger generation of purchasing managers that prefer to do their corporate buying online.

Ecommerce adoption by distributors was on the rise prior to the COVID-19 pandemic. From 2018 to 2019, U.S. distributors grew their combined total digital sales comprised of ecommerce, e-procurement and electronic data interchange (EDI) by 8.4% to $2.57 trillion. B2B ecommerce sales alone grew even faster—by 22% year over year from $712.8 billion in 2018 to $870.0 billion in 2019.

Distributor B2B ecommerce sales grew in 2020 but not nearly as fast as the pandemic roiled the U.S. economy. In 2020, distributor ecommerce sales grew by 10% to $957 billion even as total distributor and wholesaler sales declined by about 5% to about $5.80 trillion from around $6.01 trillion in 2019.

Digital sales grew even as total sales decreased as purchasing managers shifted to more online buying of business goods and services. As distribution branches temporarily shuttered or operated on shorter schedules and limited inventory, and other traditional sales channels closed because of the pandemic, the pace of B2B ecommerce picked up. In 2021, total distribution and digital sales are growing.

The U.S. economy continues to grow unevenly as the Delta variant of the coronavirus spreads and as parts of the country have yet to be vaccinated amid renewed public health mandates such as for indoor masking.

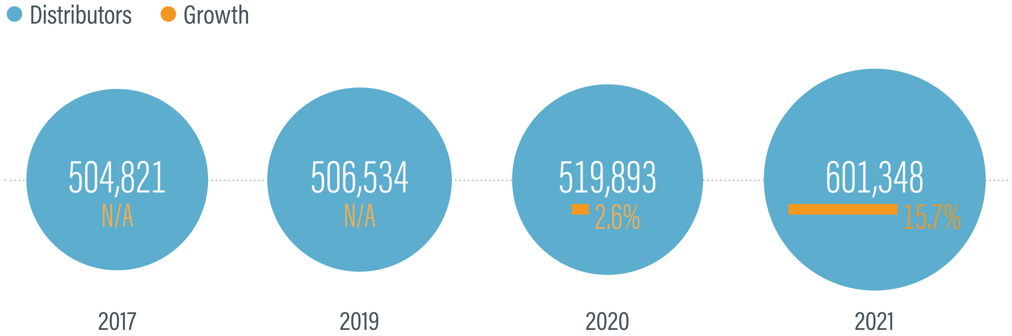
Still, distribution sales across the board are growing in 2021. Based on an analysis of data from the U.S. Department of Commerce, Digital Commerce 360 projects that total 2021 distributor and wholesaler sales are on track to grow by about 15% to $6.644 trillion from $5.798 trillion in 2020.

That projected annual growth rate of 15% is below the 22% clip at which total distributor sales grew for the first six months of 2021. But several significant factors may yet slow distributor sales in the back of the year.

For starters, the Delta variant of COVID-19 already has dialed back some economic growth and adversely impacted the labor market. Distributors and wholesalers also still face challenges including supply chain disruptions, a shortage of workers for distribution centers, the skyrocketing price of wood pallets and related items, and other increasing delivery costs.

"This year, the supply chain has become a competitive sport," W.W. Grainger Inc. CEO D.G. Macpherson told analysts on the company's recent second-quarter earnings call. "The year has been characterized by strong demand but a very challenging supply chain environment. Raw material shortages, labor shortages and transportation challenges have been the norm, particularly in the second quarter."

THE NUMBER OF U.S. DISTRIBUTORS AND WHOLESALERS IS INCREASING



Source: U.S. Department of Commerce Monthly Wholesale Time Series

TOTAL US DISTRIBUTOR SALES

Year	Sales	Growth
2021	$6,644,930,000,000	14.6%
2020	$5,798,280,000,000	-4.8%
2019	$6,088,456,000,000	2.6%
2018	$5,937,040,000,000	6.8%
2017	$5,560,830,000,000	NA

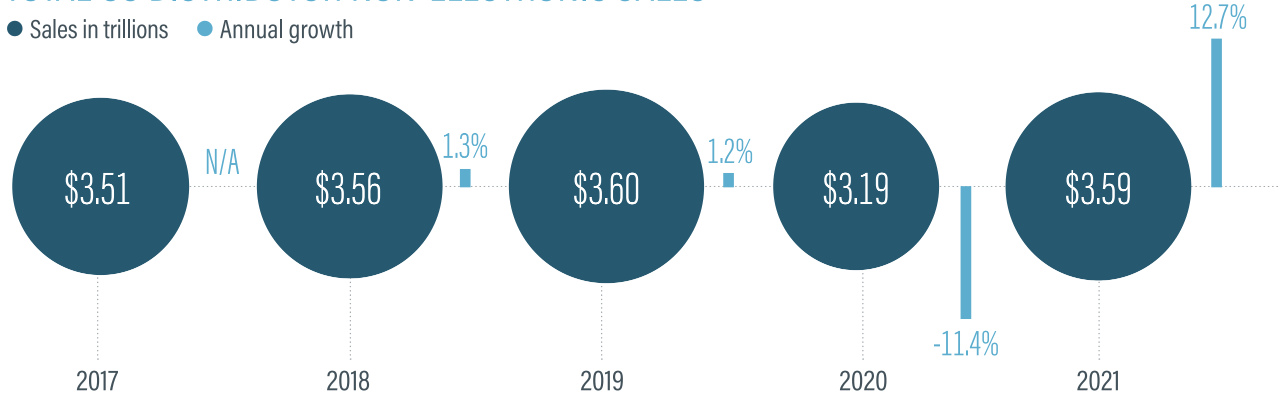
Source: U.S. Department of Commerce. The 2021 U.S. B2B Ecommerce Market Report, The 2021 B2B Distributor 300.

Distributors such as Grainger anticipate that supply chain disruption issues will impact their business and logistic operations until at least some point next year. “We expect the supply chain challenges to last through the end of the year and likely well into next year,” Macpherson said.

The growth in monthly and total annual distribution sales have a big impact on distributors and their ecommerce operations. That’s because the COVID-19 pandemic permanently accelerated the shift from offline to online business purchasing by younger purchasing managers that prefer self-service ecommerce and digital sales channels. Only about 20% of B2B buyers say they hope to return to in-person sales, even in sectors where field-sales models have traditionally dominated, such as pharmaceuticals and medical products, according to a survey from McKinsey & Co.

70% of B2B decision makers also say they are open to making new, fully self-serve or remote purchases of more than $50,000, and 27% would spend more than $500,000, McKinsey says.

TOTAL US DISTRIBUTOR NON-ELECTRONIC SALES



Source: U.S. Department of Commerce. The 2021 U.S. B2B Ecommerce Market Report, The 2021 B2B Distributor 300.

Distributors also closely watch monthly and total distribution sales for direction on how to keep their ecommerce programs and strategies flexible based on shifts in business buyer behavior. At Global Industrial Co.—formerly known as Systemax and a distributor of industrial supplies and maintenance, repair, and operations (MRO) products—the company has invested in ecommerce to stay flexible in challenging times, says CEO Barry Litwin.

"Supply chain, labor availability and freight disruptions continue to be widely reported across all segments of the economy," he told analysts on a recent earnings call. "We're building a scalable infrastructure that will support future growth and positions us for long-term success—with a powerful customer growth model, we remain well-positioned to further capitalize on the shift to B2B ecommerce."

Despite headwinds caused by such problems as supply chain disruption, the pandemic permanently accelerated the pace of digital transformation and ecommerce by distributors.

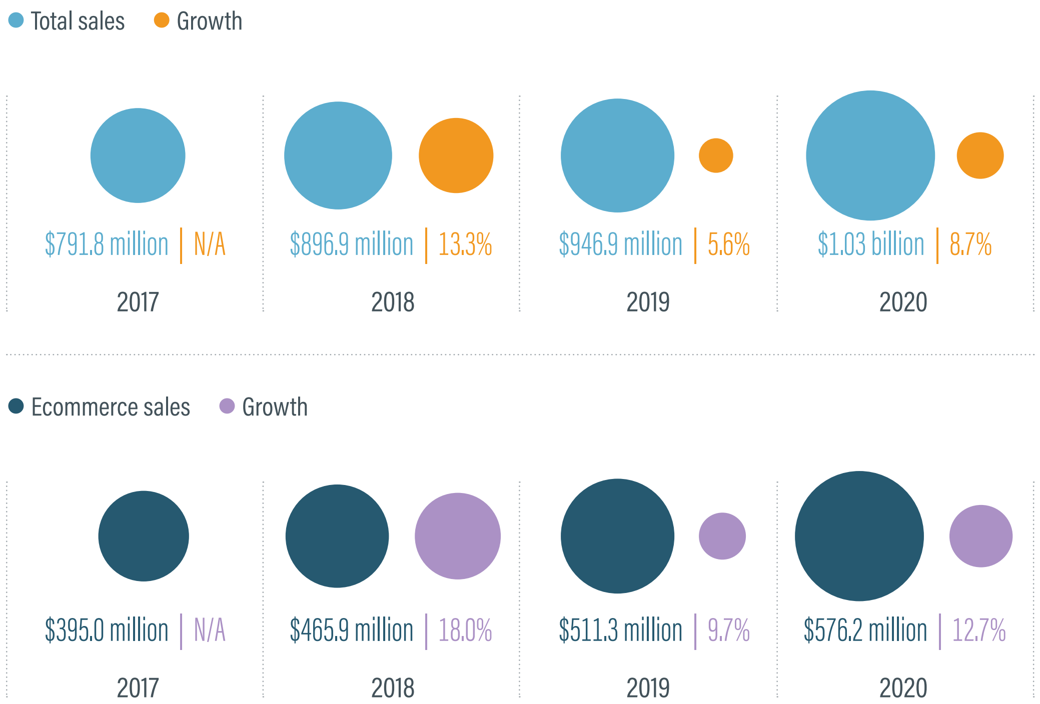
In 2021, total B2B ecommerce sales is projected to grow year over year by 17% and top $1.12 trillion, up from $957.0 billion in 2020, based on a projection by Digital Commerce 360. B2B ecommerce in 2021 is projected to account for about 17% of all U.S. distributor sales, which is the same penetration rate from 2020, but higher than 14.6% of all sales in 2019 and 11.5% in 2017.

"It's my hope distributors have learned that we are on the brink of a tipping point in B2B," says Jay Schneider, a B2B ecommerce analyst and founder of ecommerce consulting firm B2B Squared in Brookfield, Wis. "The leaders in digital customer experience will be in the best position—those who haven't properly committed to the journey are at huge risk."

Distributors of all sizes are mixing and matching ecommerce strategies and introducing new tools and services to drive growth online. For example, at Watsco Inc., a big distributor of heating, ventilation, and air conditioning (HVAC) products, total and ecommerce sales show steady growth.

While Watsco's total 2020 sales grew by 6% year over year to more than $5 billion, ecommerce grew even faster by 10% to $1.530 billion from $1.39 billion in 2019.

ANNUAL ECOMMERCE SALES FOR GLOBAL INDUSTRIAL



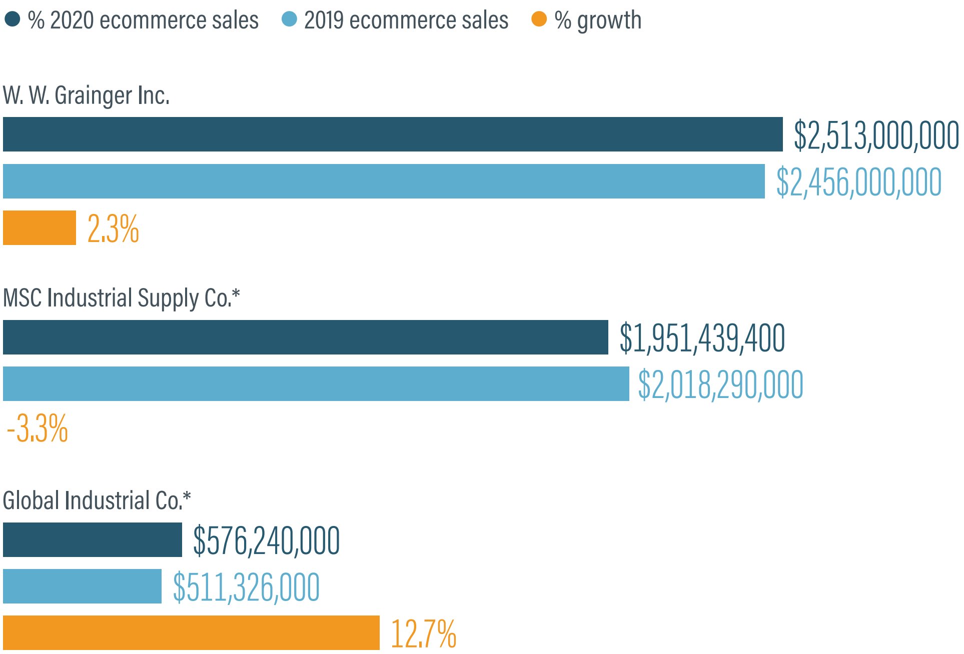
ouce: Global Industrial Co. annual reports. *Digital Commerce 360 estimates. The company changed its name from Systemax Inc. in June 2021.

Watsco, which is heavily investing in its ecommerce sales channel, also posted several other digital metrics, including:

- Digital customers—up 20% to more than 16,000 customers;
- "Highly engaged" digital customers—up 26% to over 2,400 customers;
- Total online orders—20% increase to over 1.2 million transactions;
- Online average number of items per order—27% higher than traditional orders.

"User growth on Watsco's ecommerce platform, a good indicator of overall technology adoption, was up 20% during 2020," says CEO Albert Nahmad. "This is important, as sales growth rates for customers that are active users outpace growth rates of nonusers."

HOW BIG PUBLIC DISTRIBUTORS COMPARE ONLINE



Source: U.S. Department of Commerce. The 2021 U.S. B2B Ecommerce Market Report, The 20201 B2B Distributor 300.

Watsco continues to invest in new digital technology, the company says. For example, in 2020 it rolled out two digital tools and services, including OnCall Air, a platform that gives Watsco's dealers and contractors new ways to connect with consumers online for making proposals and for buying and financing replacement systems.

The second digital service is CreditForComfort, a new platform for processing digital financing applications. Both new digital programs delivered a solid return on investment, the company says. "These platforms help digitize the relationship between contractors and homeowners when buying and financing replacement HVAC systems," Nahmad told analysts on the company's 2020 year-end earnings call.

"OnCall Air is growing exponentially," Mahmad said, adding that it "provided digital proposals to over 109,000 households" last year; and it "generated nearly $350 million in gross merchandise value," an 89% increase over the prior year.

Watsco varied its ecommerce strategy over the past two years, and the effort paid dividends, Mahmad said.

Other big distributors are seeing bigger and better ecommerce as well. For example, MRC Global Inc, a national distributor of pipe, valve and fitting products, is now doing nearly half of all North American sales online.

For the second quarter ended June 30, 2021, MRC Global reported total sales of $686.0 million, an increase of 14% from total sales of $602.0 million in the second quarter of 2020. Net income was $4 million, compared with a loss of $281 million in the second quarter of the prior year.

In Q2, North American sales totaled about $588.0 million, of which 48%, or about $276.4 million, was done through MRC's ecommerce channel, the company says. Overall, ecommerce accounted for about 40%, or $274.4 million, of all Q2 sales, MRC says.

MRC, a Houston-based distributor in business for 100 years, has been building up its ecommerce channel for several years.

In 2020, MRC—which says it offers 200,000 SKUs from 10,000 suppliers and serves more than 12,000 customers—generated about $896.0 million, or 35%, of all sales of $2.56 billion through ecommerce, according to MRC's latest annual report. That compares with ecommerce sales of $1.025 billion on total sales of $3.66 billion in 2019. The company did significant consolidation in 2020, including reducing head count and closing 27 facilities, MRC says.

"We are selling in more ways and with greater efficiencies by moving more customers online through our ecommerce initiative," MRC says in its 2020 annual report. "Our strategy is to steadily move more of our 12,000 customers online, and we are focused on investing to make it happen."

In addition to generating more sales, MRC also expects ecommerce to reduce operating costs and improve customer service as more buyers of its oil and gas products make their purchases online. "We enhanced our digital systems, hired more experts and placed them under the leadership of a new corporate vice president who is purely focused on augmenting our ecommerce offering, connecting to more customers and giving them outstanding experiences," MRC says in its 2020 annual report. "The initial savings from lowering our cost to serve through MRCGO is expected to be $5 million to $10 million by 2022."

MRCGO is MRC Global's ecommerce platform, which launched in

July 2019 and plays an important role in the company's growth and increases in operating efficiency, executives say. "We continue to enhance the functionality of our MRCGO ecommerce platform, and I've seen an increase in customer adoption of these digital tools over the past year," president and CEO Rob Saltiel told Wall Street analysts on the first-quarter 2021 earnings call, according to a transcript from Seeking Alpha. Saltiel became CEO in March, succeeding Andrew Lane, who retired after 12 years at the helm.

Saltiel added that nearly three-quarters of major customers use MRC's digital commerce platform. "The share of digital revenue in the first quarter of 2021 was 41%, a one-thousand basis point increase over the same quarter a year ago," he said. "Our managed account customers are the biggest user of digital tools with 74% of those customers having some aspect of digital integration. We continue to see opportunity with deeper usage and by continuing to migrate transactional customers to digital."

The past two years have been a journey and, in many cases, a crash course in accelerated digital commerce for many distributors, Schneider says. "If there were those in distribution doubting the long-term significance of digital, COVID-19 showed them that digital isn't just an offering, it must lead the business," he says.

Many distributors anticipate that the economy and big challenges like supply chain disruption will begin to dissipate. But they also expect ecommerce sales, but at an uneven rate. A case in point is MSC Industrial Direct Co. Inc.

Judging by its fiscal third quarter, MSC Industrial Direct is getting back in a big way to its strong performance in B2B ecommerce.

Ecommerce sales at the distributor of metalworking and other industrial products increased to $521.8 million for the third quarter ended May 29, 2021, up 13.9% from the prior quarter and 13.1% from a year earlier. By comparison, third-quarter total sales increased by 3.8% to $866.3 million.

The Q3 increase in ecommerce sales marked the sharpest rise in MSC's ecommerce sales since before the COVID-19 pandemic, bringing ecommerce to 60.2% of total sales. Since early last year, MSC's ecommerce sales had dipped under the 60% share mark in several quarters.

But sales through MSC's internet-connected vending machines "dropped considerably during the pandemic and is now climbing back," president and CEO Erik Gershwind said on a recent conference call with investment analysts.

In another sign that MSC is getting beyond the effects of the pandemic, Gershwind noted that the company's third-quarter sales of non-safety and non-janitorial product lines grew 21% year over year.

Going forward, MSC also expects more growth ahead for its flagship ecommerce site, MSCDirect.com, Gershwind said on the call.

MSC defines ecommerce as all sales through multiple digital channels, including its ecommerce portals, internet-connected vending machines, vendor-managed inventory systems, procurement software and electronic data interchange. "Over half of that is MSCDirect.com," Gershwind said.

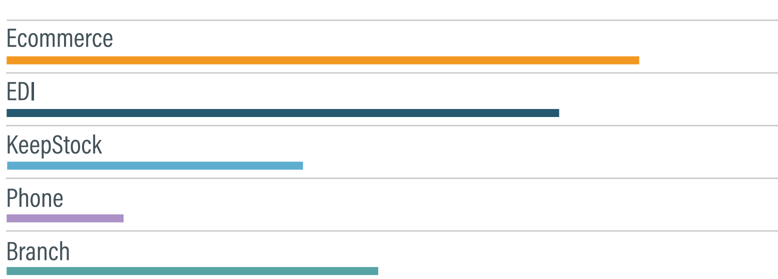
Moreover, MSC is making significant investments in digital operations, with a primary focus on MSCDirect.com. "Most of the investments are directed there, to take MSCDirect to another level," Gershwind said. "And certainly, I would expect over time that portion of the business to grow as a percentage of revenue."

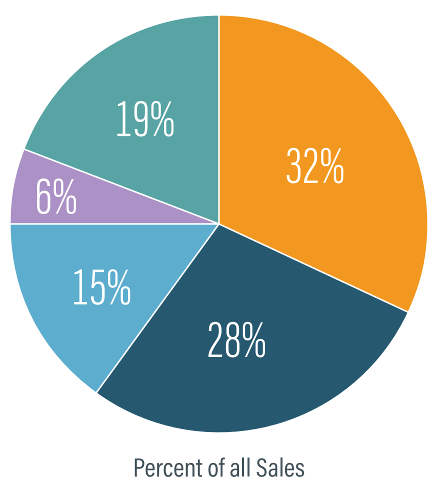
He added: “What I’m going to be looking at is the quality of the experience on MSCDirect.com … retention, average order size and some of the sort of micro measures.”

To put MSC’s recent growth in a broader context related to the effect of the COVID-19 pandemic over the past year, MSC’s Q3 2021 ecommerce sales were virtually slack, up just 0.2%, compared with the third quarter of 2019.

“The industrial economy is experiencing very real supply chain shortages and disruptions. These disruptions are evidencing themselves in product scarcity, freight delays, and extreme labor shortages that are resulting in significant availability and inflationary pressures—we are certainly not immune to these challenges,” Gershwind said. “We are very well-positioned to navigate the current environment, particularly when compared to the local and regional distributors who make up 70% of our market. MSC’s broad multi-brand product assortment, our high inventory levels, strong supplier relationships, and next-day delivery capabilities position us well to accelerate market share capture.”

HOW GRAINGER HIGH TOUCH US BUSINESS DIGITAL VS. PHYSICAL SALES BREAKS OUT





Source: W.W. Grainger Inc. 2019 annual report. KeepStock are sales generated through the company's information management system.

As the next year unfolds, distributors are anticipating generating higher sales—both online and offline. Distributors also expecting supply chain challenges to dissipate, although the consensus seems to be for later in the second half of 2022.

Distributors see the next 12 months as a year when nearly all sales, including from traditional channels through branches and sales reps making deals out in the market, will be digitally driven. “The trend is for digitally driven omni-sales,” Schneider says.

But the race is to accelerate ecommerce even more because buyer demand is for more—and not less—digital purchasing. As COVID-19 has caused B2B buyers to conduct more of their purchasing online, more than a third are purchasing from B2B ecommerce sites at least weekly, and more than 80% at least monthly, according to an April 2021 Digital Commerce 360 B2B Buyers survey of B2B professionals. When asked why they purchase online during the pandemic, among the most common reasons respondents cited were broad selection, more efficiency in purchasing, more information, and saving money.

The distributors that embrace and accelerate digital commerce—and deliver a superior ecommerce experience that makes researching, placing, and receiving an order easy and convenient—will generate more online sales and loyal customers.

CASE STUDIES

GRAINGER'S DIGITAL STRATEGY ZEROES IN ON MORE CUSTOMER CONNECTIONS

The key to moving forward online in the future is using more of Grainger's digital channels to reach customers, CEO D.G. Macpherson says.

'Digitally connecting directly with customers is the focus."

—**D.G. Macpherson,**
CEO, W.W. Grainger Inc.

W.W. Grainger Inc. sees a big future in digital commerce—as the biggest distributor of maintenance, repair, and operations (MRO) products continues to concentrate fully on using more digital tools and services to closely connect with customers, says CEO D.G. Macpherson.

Today, digital commerce is more important than ever at Grainger, which last year generated about 75% of sales electronically through what the company calls its High Touch U.S. business, which caters to large companies with a high level of service. That breakdown includes 32% from ecommerce sites including Grainger.com, 28% through electronic data interchange and e-procurement and 15% through KeepStock, which includes vendor-managed inventory, customer-managed inventory, and on-site internet-connected vending machines that are designed to automatically record retrievals of products by a client's employees and trigger replenishment orders, according to the company's 2020 annual report.

In comparison, only 6% of orders originated through the company's network of about 250 branches in 2020 and only 19% through the call center, according to the annual report.

Today, the company is fast approaching the widow where about 80% of the company's U.S. High Touch orders will be digital.

The key to moving forward online in the future is using more of

Grainger's digital channels to reach customers. "Digitally connecting directly with customers is the focus," he says.

ZORO.COM SURPASSES $700 MILLION IN SALES

Grainger's digital growth is centered on diversification and growing Grainger's Zoro and MonotaRO brands, which unlike the High Touch operations are part of Grainger's "Endless Assortment" business and cater to smaller companies with lower prices and less sophisticated service. Zoro is an online MRO products ecommerce site for U.S. customers. Last year, Zoro.com generated web sales of more than $700 million, Grainger says.

The Zoro website's inventory also expanded rapidly, Macpherson says. For example, in the last year, the number of available SKUs on Zoro.com has increased by more than 1 million SKUs to about 2.5 million. In comparison, the company ended 2020 with a total inventory of about 6 million SKUs on Zoro.com, according to the annual report.

Several factors will likely have a big impact on Grainger's strategy for more digital growth, Macpherson says. A major challenge is how quickly national and global supply chain issues can be fixed. He calls the current supply chain business environment "weirded out" because of the duration of the global COVID-19 pandemic. "Anyone in the distribution business is seeing disruption at the customer level," Macpherson says. "The challenges are real, and the [the supply chain] has been the weirdest I've seen in 30 years."

Next year, supply chain obstacles, in general, should be easing, but "I think it will be gradual," he says.

Going forward, Macpherson says Grainger will continue to invest "tens of millions of dollars" into its digital tools and channels, he says. "It's all about being digitally connected at the customer touchpoints," he says.

ABOUT THE AUTHOR

Mark Brohan is the Vice President, B2B and Market Research Development at Digital Commerce 360, covering B2B ecommerce trend. Prior to his current role, Mark was vice president of research for Digital Commerce 360 and editor of Internet Retailer's Top 500 Guide, Top500Guide.com and related research publications. Mark's previous experience includes leading new print and web product business development for Faulkner & Gray. Among his positions were web publisher and editorial director for DM Review magazine and its two websites: DMReview.com and dataWarehouse.com. He was also the founding editor of various Faulkner & Gray technology magazines, including Internet Retailer. Mark earned a bachelor's degree in secondary education and history from Western Michigan University and a master's in journalism and public affairs from the American University.

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ABOUT DIGITAL COMMERCE 360 RESEARCH

At Digital Commerce 360 Research, our goal is to provide data and information about ecommerce that helps retail and B2B companies, investors and technology providers prosper.

The team tracks hundreds of metrics on roughly 6,000 online retail companies around the world, including such sought-after data points as web sales and traffic, conversion rates, average order value and key technology partners used to power their ecommerce businesses. We sell this data in its raw format in our multiple online databases, and we dig deeply into these numbers to help inform our 30+ exclusive analysis reports we publish each year on key ecommerce topics, including online marketplaces, cross-border ecommerce and omnichannel retailing. In-depth, data-focused reports are also available on key categories of online retail like apparel, housewares, food and luxury. We also have a robust custom research department, which provides tailored research products—in-depth reports, exclusive surveys, raw data pulls and other products—for top retail companies, consultants, financial analysts and technology companies.

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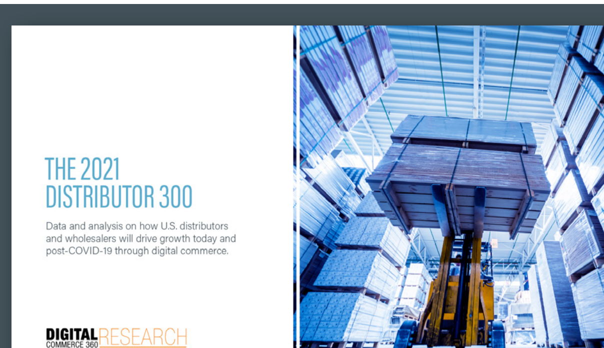

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