RECONFIGURATION OF THE ORNAMENTAL STONE MARKET IN SOUTH FLORIDA: LABOR SHORTAGE, DIGITAL INTERMEDIATION AND NEW DISTRIBUTION MODELS

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ABSTRACT

This study makes a simplified analysis of how the global shortage of skilled labor is redefining the dynamics of the natural stone distribution sector in South Florida, one of the strategic hubs of the North American luxury real estate market. Through empirical case studies, the emergence of hybrid models (B2B/B2C/D2C) mediated by digital brokers - professionals and/or independent companies that use social networks and e-commerce to connect distributors to end consumers - is demonstrated, filling gaps left by the lack of specialized salespeople. The article also explores the strategic dilemma faced by distributors between maintaining traditional B2B relationships with marble workers or adopting direct sales (D2C), highlighting innovative solutions such as shared inventory via online platforms and the outsourcing of commercial functions. The results show that successful adaptation in this technical knowledge-intensive sector requires: (a) integration between human interaction and digital tools; (b) restructuring of commissioning models for brokers; and (c) investment in accelerated training for new generations. It is concluded that the labor crisis has worked as a catalyst for organizational innovations in this traditional segment.

Keywords: Algorithmic mediation. Platform economy. B2B e-commerce. Innovation in supply chain.

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INTRODUCTION

The shortage of skilled labor has become a global challenge, impacting several sectors of the economy, including the construction industry. In the United States, for example, it is estimated that there is a shortage of more than 4.5 million workers annually to meet the demand of the market in general. This scenario is even more critical in specialized segments, such as the distribution of ornamental stones for kitchen and bathroom countertops, in which technical expertise is essential for customer service and operational management. In South Florida, a region known for its hot real estate market, sink and countertop distributors face difficulties in finding trained professionals, forcing companies to rethink their business models to remain competitive.

The COVID-19 pandemic has accelerated transformations that were already underway, highlighting the importance of digitalization and remote care. In the natural stone sector, which has traditionally relied on face-to-face interactions in showrooms, new sales models have emerged, such as Direct-to-Consumer (D2C), driven by social media and e-commerce. In addition, independent professionals — designers, architects, and brokers — have started to act as digital intermediaries, connecting end consumers to distributors through online platforms. These brokers, often with no previous experience in the sector, use digital tools to generate demand, demonstrating how technology can fill gaps left by the lack of specialized labor.

The phenomenon of Digitally Native Brands — companies that are born and operate primarily in the digital environment — also gains relevance in this context. Small entrepreneurs, with no history in the ornamental stone market, are able to sell products from large distributors using digital marketing strategies and informative content. This trend not only broadens the reach of distributors, but also introduces new sales flows, representing about 10% of some companies' revenues. The flexibility of these hybrid models (B2B, B2C and D2C) shows the sector's ability to adapt in the face of structural challenges.

This article seeks to explore how labor shortages have shaped distributor strategies in South Florida, with a focus on incorporating digital technologies and intermediaries. By analyzing empirical cases and emerging trends, the study aims to contribute to the discussion on innovation and resilience in traditional sectors, offering insights for managers and academics. Adapting to this new scenario not only ensures the survival of companies, but also redefines the dynamics of a market in constant transformation.

BACKGROUND

The shortage of qualified labor is a global challenge that impacts strategic sectors, such as civil construction, with direct effects on the material distribution chain. In South Florida, a region with a dynamic real estate market, the lack of professionals specialized in the commercialization of ornamental stones has required urgent adaptations from companies. This work is justified by documenting and analyzing the innovative strategies adopted by these distributors, offering a realistic overview of how the sector is responding to a problem that tends to intensify in the coming years.

The digital transformation accelerated by the pandemic has revealed new business models, such as intermediation by freelancers and direct-to-consumer sales via social networks, which challenge traditional practices in the sector. This study brings to light concrete cases of how small entrepreneurs, with no previous experience, are filling gaps left by scarce labor, generating a significant impact on companies' revenues. These dynamics deserve academic attention because they represent a structural change in the way traditionally analog businesses reinvent themselves.

Publishing this research in a scientific journal is relevant because it not only records an emerging phenomenon, but also offers insights applicable to other markets facing similar challenges. By uniting practical analysis and theoretical reflection on adaptation and innovation, the work contributes to contemporary debates on crisis management, digital transformation, and sustainability of labor-intensive sectors, becoming a reference for future research.

INFORMATION RELEVANT TO AND FROM THE SECTOR

At the end of last year, it was published by the United States Chamber of Commerce that among several sectors of the Industry, one of the most affected is the Business Services Sector or just the Business Sector. It is due to say that the pandemic was a catalyst for retirements, highly qualified professionals left the market and retired. The problem is that the speed with which professionals left the market is not proportional to the speed of training of new generations (CARVALHO, 2020).

> "When taking a look at the labor shortage across different industries, the education and health services sector, and the professional and business services sector, consistently exhibit the highest number of job openings," writes Stephanie Ferguson Melhorn and Makinzi Hoover for the U.S. Chamber of Commerce.17 de dez. 2024

The population is aging and retiring, while the new generations are either not yet ready, or simply have other priorities, such as well-being. It is as if Maslow's pyramid is inverting. In a recent publication (ROSA, 2025), there is a focus on this phenomenon, but only focused on the West, considering that Asia does not experience this problem, which should be disagreed with if the increase in obesity and the increase in the number of "full-time children" are considered. According to a BBC report in July, 2023 (CHANG and NG, 2023) which showed an exponential increase in the rate of young people suffering from Burnout, as the "996" concept - working from 9:00 am to 9:00 pm, six days a week - a practice of the previous generation, does not apply to today's young people, as they seem to reinvent the concept of financial security.

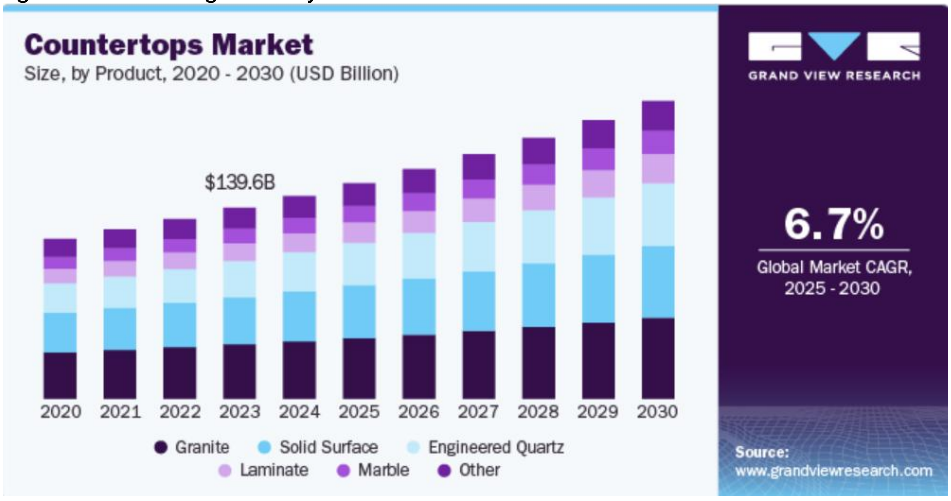
The lack or delay in the training of new generations, whether due to lack of interest or also due to lack of economic and social opportunities, increasingly delays and decreases the entry of new potential talents into the labor market (DYCHTWALD et al., 2006; UNITED STATES, 2024). In the civil construction market, when analyzing the finishing phase of projects, it is realized that the more elaborate the demand - the luxury market - the more difficult it becomes to find qualified professionals who add value to the product.

It is worth mentioning that unlike many sectors that suffer from a shortage of labor, the finishing sector in civil construction, specifically ornamental stones, is an industry that pays very well to the interlocutors - Salespeople, Sales and Marketing Managers and Commercial Directors - who deal with the target audience, whether B2B or B2C. It is necessary to highlight that it is a sector that on average, in sales alone, pays 25% more than most other industries in South Florida - USA (GLASSDOOR LLC, 2025; TALENT.COM, 2025). Much of the disinterest of the new generations is related to the lack of qualification and the fact that the work of salesperson is considered exhausting, as the workdays are long and often do not end at 6 pm, since a good seller of Ornamental Stones from Brazilian Industries (CARVALHO, 2019), for example, answers emails and often text messages during the night, Because your customers' time zone can be up to 8 or 10 hours apart, depending on the region or country your customers are in. In addition, Ornamental Stone sales executives in Florida need to be flexible in the schedules for face-to-face services, as it is necessary to do so on Saturdays and Sundays on a recurring basis.

DIGITAL TRANSFORMATION AND NEW BUSINESS MODELS

According to Business Research Insights, a respected market intelligence company (BRI, 2024), the natural stone market in the world ended 2024 with figures above USD 20 billion and is expected to grow by more than 30% by 2032. The numbers of the ornamental stone industry are really impressive and this is without considering its main competitor, artificial quartz, also marketed by distributors around the world. Considering natural stones and artificial quartz together in the kitchen countertop manufacturing market alone, the values exceed the figure of USD 149 billion (GVR, 2024)

FIGURE 1. questions that permeate figure X: And how much of all this product is sold digitally? What has E-Commerce brought to this analog industry?



Source: GVR, (2024)

According to a study by Grand View Research (GVR, 2024), the worldwide countertop market reached around $148.34 billion in 2024. Projections indicate that by 2030, this value is expected to reach US$ 217.79 billion, with an annual growth rate of 6.7% between 2025 and 2030. This advance is the result of the search for larger kitchens and more bathrooms, added to the expansion of restaurants and the increase in the supply of hotel rooms in the world. Sophisticated materials, such as exotic granite and quartzite, stand out for their resistance and beauty. At the same time, high interest rates have stimulated home renovations, as many prefer to renovate their homes rather than change address.

In commercial projects, construction companies that make houses or apartments for sale, use natural granite or artificial quartz - simple products without design - called in the market as Level 1, they are easily sold through photography throughout the B2B chain, from the sales process in the factory to the distributor, through the sale to the construction company, which in turn sells (B2C) the finished property to the end customer. The use of emails and links with photos is quite widespread in these cases and in more than 90% of sales the customer does not need to see the product in person, at most, a small sample, everything being solved with online tools.

The big difference happens when adding value to the kitchen countertop, when considering marbles, quartzites or artificial quartzes with veins and movements that create designs. Internet sales are necessarily made by photo and most of the time with the customer's approval, whether it is himself, in person, or a contracted person. Both in the B2B, B2C and D2C stages, this is how it happens, as shown in the examples below:

1. Natural Rocks B2B Sale - From the point of extraction Granite Block - Mining Company to Manufacturing Company - Transformation Company: There is the figure of the Block Marker, who most of the time is the buyer. As it was before the Digital Age: The buyer went to the Quarry and defined alone what to buy, based almost exclusively on his empirical knowledge. As it is today in the Digital age: The buyer goes to Pedreira, pre-selects the blocks, sends videos and photos to the sales team, which in turn helps him in making the decision of what to buy.
2. Natural Stones B2B Sale (wholesale) - From the manufacturing company - Industry to the Distributor: there is the figure of the slab seller, who represents the industry and the slab inspector, who represents the distributor. As it was before the digital age: The salesperson, together with the customer, decided the product to be purchased based on their demand. The customer, most of the time, trusted what the seller stated regarding the structural quality of the product and standard, simple photos were sent to the customer for approval. As it is today in the digital age: The customer not only sends his plate inspector or plate marker, but also requires photos and videos, sometimes from different angles, for decision making. Industries already have the help of tools such as links that connect the customer, distributor, to the companies' online inventory. The customer is often able to assemble their cargo (truck or CTNR), choosing the bundles - packages of sheets - that best suits them and even use the same photos to start the marketing process even before the goods are available for sale in their warehouse.
3. Natural Stones B2B Sale (Wholesale) - From the distributor in South Florida, study in question, to the great marble worker. In this case, the figure of the distributor's salesperson and his degree of relationship with the customer has a lot of influence, in addition, marble workers who stock usually approve photos, but are still based on the seller's judgment, because if they do not like the product, they can return it without any kind of loss. It is noted that in this case or at this stage, E-Commerce does not yet exert a strong influence on the sales process, there is the sending of photos, by digital means, but the relationship between seller and customer is still very latent.
4. Natural Stones B2C or D2C (Retail Sale) - It is not just one case, but several, we will see each one below:

4.1 B2C - From the Marble Maker to the Final Consumer (Great Marble Workers) - The sales process in the marble shop involves the visit of the customer, who, based on his choice of floors and cabinets, defines the color and material that best suits his desire. Thus, in marble factories that stock products, the final consumer can choose their plates on the spot.

4.2 B2C - From the Marble Maker to the Final Consumer (Small Marble Workers) - The sales process in this case takes place at the distributor, which has a showroom, in which all its products are presented. In this sales model, the distributor has contact with the final consumer, but the pricing to the final consumer is done by the marble worker. Thus, the end customer goes to the distributor just to choose the product he wants.

4.3 B2C - From the Broker to the Final Consumer - We will talk about this case in more detail below.

4.4 D2C - From Distributor to Final Consumer - Some companies have decided to adopt a sales system that works directly with the final consumer, stocking only luxury products, high added value, with the objective of serving the "A" public. The objective of this distributor is to attract the final consumer who wants a unique product for their bathroom or kitchen, so that the decision-making process in choosing the material depends only on the customer.

It should be noted that in all the cases mentioned above there is a particularity, which is the fact that generates the demand, the decision of the final consumer to renovate his house, or kitchen or just the bathroom, it is this attitude that triggers the whole chain. Trends in colors, textures, finishes and products announced at fairs, design and architecture exhibitions and that are strongly disseminated on the internet, even though they happen in different places in the world, such as KBIS in Las Vegas, Salone dei Mobile in Milan, Expo-Revestir in São Paulo and many others, have always existed and will still exist for a long time, After all, what has always dictated the movement of the market is the trend, whether due to cultural, socioeconomic, ethnic, or other factors, this does not change. What has changed is the autonomy of the end customer, who, thanks to the internet, has access to any and all types of content, practically instantaneously, without necessarily needing the contractor. Before the advent of digital, the architect or designer determined where the end consumer should buy, today this no longer exists, the end consumer has access to everything.

CHARACTERS INSIDE THE CHAIN

THE ROLE OF DIGITAL INTERMEDIARIES (BROKERS) IN THE MODERN ECONOMY

Analysis of the figure of the freelancer and the digital middle-man, their performance in social networks and their impact on the connection between supply and demand.

> The term digital intermediary refers to any entity or platform that acts as a link between two or more participants in a digital environment. This can include marketplaces, social media, ad platforms, and other services that facilitate interaction between consumers and suppliers. The role of the digital intermediary is essential to optimize the user experience, providing a user-friendly and accessible interface for transactions and interactions (ALFARTH DIGITAL, 2025)

THE ROLE OF THE DIGITAL INTERMEDIARY IN THE NATURAL STONE SECTOR: THE IMPORTANCE OF THE BROKER AND DIGITAL PLATFORMS

The concept of digital intermediary has evolved significantly in recent years, especially with the growth of technologies aimed at communication and e-commerce. Traditionally, the term referred to platforms such as ERPs, CRMs, and digital marketplaces, such as Facebook Marketplace, Amazon, among others, which act as facilitation channels between those who sell and those who buy. However, in the specific context of ornamental stone sales, especially in the highly competitive and segmented market of South Florida - USA, this concept gains important nuances: digital intermediation depends less on automated systems and more on the human figure behind the interaction – the broker.

THE BROKER AS A HUMANIZED DIGITAL INTERMEDIARY

The broker, in the ornamental stone sector, is usually a small individual, or legal entity, who acts as a link between the final consumer and the distributor. His work takes place mostly on social networks, where he creates authority, establishes relationships and promotes products in an organic and targeted way. Through posts, comments, videos, and direct interactions with the target audience, this professional humanizes the shopping experience, creating trust and credibility.

Unlike automated platforms, the broker offers personalized service, based on technical knowledge, visual repertoire and commercial sensitivity. He knows how to present the right stone for the right project, understands the consumer's pains and, above all, knows how to convert them into sales opportunities. It is, therefore, a digital intermediary with a face, voice, and social presence, which generates value not only for the end customer, but also for the distributor.

THE DYNAMICS OF THE SALE: DIGITAL AT CONTACT, PHYSICAL AT CLOSING

It is essential to recognize that, despite the digitalization of the initial contact, the ornamental stone sector still demands a sensory and face-to-face experience at the time of the purchase decision. The customer wants to touch, see and compare the stones. Thus, the broker directs the customer to the distributor's warehouse – where the product is physically available for visitation and closing the sale. In this sense, the broker's digital presence is the trigger that activates the commercial process, but the conversion almost always occurs in person.

ADVANTAGES AND TRADING STRATEGY OF THE BROKER

One of the great advantages of the broker's performance is its business model with low fixed cost. He does not need to maintain his own showroom, nor invest in inventory. Its entire operation is based on the distributor's structure, which drastically reduces its risks and expands its capacity to serve diverse customers, with agility and focus. For the distributor, this represents an indirect sales model with high potential for generating traffic and brand exposure, without the risks of cannibalizing its own B2B customer base.

THE DIRECT DISTRIBUTION DILEMMA: D2C VS. B2B

Another critical point addressed is the dilemma faced by the distributor when opting for direct sales strategies to the final consumer (D2C). When this happens, it inevitably positions itself as a competitor of marble workers – who are its traditional customers in the B2B model. On the other hand, if the distributor chooses to work exclusively with builders and marble workers, he loses the opportunity to benefit from the visibility and demand generated by the end consumer.

One of the solutions to this impasse is precisely in the figure of the broker. By acting as an independent reseller, the broker allows the distributor to maintain its neutral position, without compromising its B2B relationships, while accessing the end market indirectly, expanding its influence and presence in the market.

BROKER RELATIONSHIP MANAGEMENT

Finally, it is essential to highlight that broker loyalty is an essential strategy for the success of this hybrid distribution chain. The distributor must create clear and attractive commercial policies, focusing on: Agile and personalized service; Variety and quality of products; Competitive trading conditions; Support in marketing and communication.

By offering support and recognition, the distributor not only attracts talented brokers, but also transforms its physical structure into a true sales and relationship hub, which serves both the broker and the end consumer.

BUSINESS ADAPTATION IN CRISIS SCENARIOS

Strategies adopted by companies to deal with labor shortages, including process flexibility, outsourcing, and innovations in customer service.

THE INDISPENSABLE HUMAN INTERACTION IN THE NATURAL STONE SECTOR: REALITIES, CHALLENGES AND TRENDS IN SOUTH FLORIDA

The ornamental stone sector, from extraction to sale to the final consumer, has historically remained a production chain intensive in human interaction. Even in the face of the advancement of digital technologies and industrial automations, the nature of the product and the technical processes involved still require direct human action. This is due not only to the variability and peculiarities of the rocks – which make each piece practically unique – but also to the absence, to date, of sufficiently flexible and adaptable technological solutions that can completely replace human sensitivity and decision-making capacity in crucial stages of production.

THE REALITY OF PRODUCTION: BETWEEN TECHNOLOGY AND CRAFT

As an emblematic example of this reality, we can mention the processing process, in which professionals manually apply resins to correct natural cracks in stones. It is a task that requires precision, visual judgment and tactility – skills still unattainable by today's robotic solutions. The so-called Construction 5.0, as discussed on the MOBUSS CONSTRUÇÃO blog, (2023), shows a promising path of integration between humans and machines, but also reinforces that sectors with a high degree of customization and variability will continue, at least for a long time, to depend on the analog presence.

THE SOUTH FLORIDA CONTEXT: DISTRIBUTION AND SALES IN TRANSFORMATION

When we focused on the dimension stone distribution market in South Florida, we observed a combination of operational and commercial challenges. On the one hand, there is the advancement of logistics outsourcing solutions, such as outsourced container delivery and reception services, which relieve the distributor of heavy operational processes and free up focus for commercial and strategic management. On the other hand, in the sales process, the transformation is even more visible. Although the traditional figure of the external salesperson, who visits marble shops and finishing companies, is still fundamental, new models have emerged with force, reflecting a more complex, decentralized sales environment guided by networks of influence and technology.

THE FIGURE OF THE BROKER AND THE NEW COMMERCIAL ARCHITECTURE

In this new scenario, the broker emerges as a key part of the modernization of the sales process. Acting as a legal entity, the broker establishes a hybrid relationship with the distributor: it is both a customer and a business partner. He has direct access to the inventory, conducts negotiations with the end consumer and promotes the products through digital channels such as social networks, WhatsApp groups, and even scheduled technical visits. This model offers relevant gains to the distributor, such as: Greater brand visibility; Expansion of the consumer base; Reduction of fixed costs with own sales team; Maintenance of commercial neutrality vis-à-vis B2B customers, such as marble workers.

NEW AND OLD ACTORS IN THE SALES PROCESS: A COLLABORATIVE NETWORK

In addition to brokers, there are other actors that today play decisive roles in the promotion and sale of ornamental stones: Designers and architects, who directly influence the choice of materials by their customers and act as prescribers of the brands with which they identify; Internal salespeople, responsible for digital channels and fast and efficient interactions with consumers and specifiers; Business connectors, which bring architects and designers closer to certain distributors, functioning in practice as indirect sales representatives. This new commercial architecture, more horizontal, collaborative and flexible, redefines the logic of distribution and requires new management practices.

ORGANIZATIONAL CULTURE AND HUMAN VALORIZATION

In this changing environment, companies that want to thrive need to rethink not only their sales strategies, but also their organizational culture. There is no longer room for centralizing models oriented exclusively to the maximization of individual profit. The best results have come from companies that adopt policies such as: Profit sharing; Commissions on actual performance; Bonus for goals achieved; Healthy organizational environments with room for professional growth. Sharing risks, gains, and responsibilities has proven to be a powerful tool for talent retention and sustainable expansion.

CREATIVITY, DIGITAL MANAGEMENT AND THE FUTURE OF THE SECTOR

In view of the global shortage of qualified labor, especially in the operational and technical sales sectors, it is urgent to adopt strategies based on: Organizational creativity; Focus on tangible results; Intelligent distribution of tasks and resources; Adoption of efficient digital management tools adapted to the reality of the sector. Digitalization with human presence is, in this context, the competitive differential. It is not about eliminating human beings from the process, but about enhancing their performance with technologies that expand their decision-making capacity, organization, and performance.

FINAL CONSIDERATIONS

The research indicates that the lack of skilled workers in the area of natural stone in South Florida is more than an isolated problem; It is something rooted that needs a complete overhaul of the forms of distribution. When analyzing examples, we notice that successful companies are turning this difficulty into an advantage, mixing functions: digital brokers attract customers, while online platforms improve processes that previously depended on experienced people. This shift has its problems: Digitization increases reach and decreases spending, but the need to touch and see the product limits the total replacement of the sales process. The solution that emerges, seen in the examples, are collaborative groups where distributors offer physical space, brokers attract customers through social networks, and digital tools help in the choice of products, creating a stronger value chain that is adaptable to market changes.

More broadly, the findings show that the natural stone industry is experimenting with solutions that can help other areas of construction with similar problems. The combination of (a) flexible forms of payment per result (such as higher commissions for brokers), (b) quick training with augmented reality for new employees, and (c) shared inventory control systems, indicates a future in which the lack of specialized labor will be alleviated by new forms of organization, not just machines. It is important to remember that this change needs investments in three areas: digital training for older workers, attracting young talent with remote work, and creating technologies that value the physical nature of the product. If this is not done, the differences between the companies may increase.

FUTURE PERSPECTIVES

If we project the future to 2030-2035, the ornamental stone industry will probably face three major changes at the same time: (1) the strengthening of focused sales platforms, combining the removal of raw materials, treatment and delivery through subscription plans, reducing the need for people in common businesses; (2) the general use of technologies that give the feeling of reality, such as holograms that we can touch and metaverses for companies, to show how products really look, allowing sellers and customers to see what the stones look like in practice, from the drawings to the glitter, before deciding to go see it in person; and (3) the emergence of people new to the process, such as "digital materials specialists," a role that does not yet exist, who will bring together what they know about geology, environmental design, and computer programs that provide suggestions for connecting small sellers with groups of buyers around the world. Interestingly, these technological innovations should give more value, not take away, the value of people who continue in the field: those with more than one background, for example, geology and data analysis, or who are very good at dealing with people, such as salespeople, will earn much more than they do today, increasing the gap between jobs that require more study and the simplest ones in the sector. To take advantage of these opportunities, sellers need to prioritize agreements with technical schools to create courses that mix practical and digital work, and also invest in ways to take care of data that protect trade secrets without hindering mutual help between companies, a balance that will be very important to succeed in the next ten years.

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