

SEPTEMBER 2020 (based on August 2020 Starts Stats)

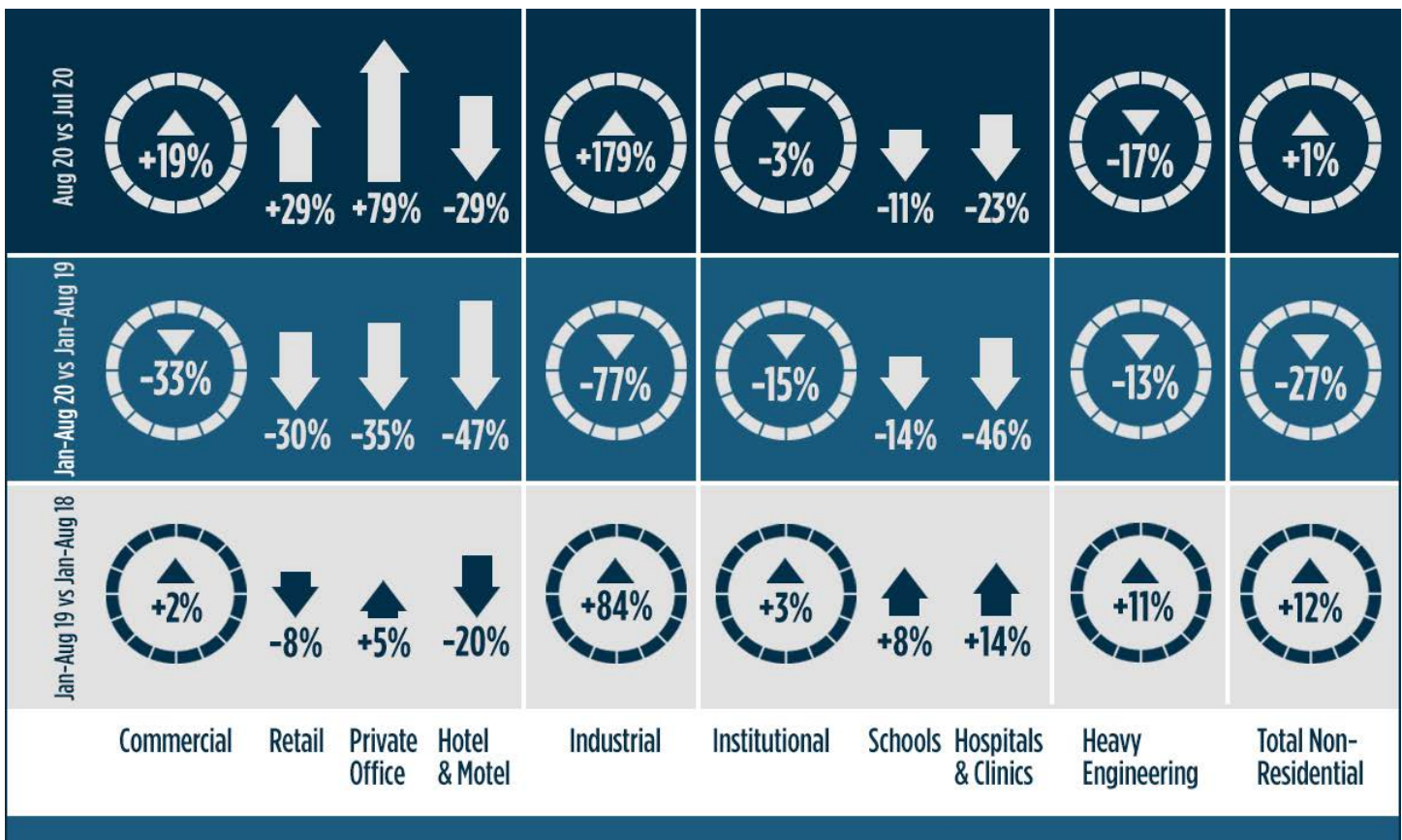
# Construction Industry Snapshot

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## August Nonresidential Construction Starts Flat M/M; Down by a Quarter Ytd

ConstructConnect announced today that the latest month's volume of construction starts, excluding residential work, was \$31.4 billion, a little better than flat (+1.2%) versus July's figure of \$31.0 billion.

August 2020 versus August 2019, which teemed with mega projects, was -43.3%. August year to date has declined by a bit more than one-quarter (-26.9%).



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## August Nonresidential Construction Starts Flat M/M; Down by a Quarter Ytd

### Last Year's August Teemed with Mega Projects

ConstructConnect announced today that the latest month's volume of construction starts, excluding residential work, was \$31.4 billion (green shaded box, Table 6, page 8), a little better than flat (+1.2%) versus July's figure of \$31.0, originally reported as \$28.6 billion. The sizable positive revision to the previous month's number was due to about evenly spread increases in warehouse, bridge power and marine work.

August 2020 versus August 2019 nonresidential starts were -43.3%. But 2019 was an exceptional year for 'mega' project starts (i.e., projects valued at \$1 billion or more each). In 2019, there were 35 mega projects summing to \$79.1 billion. August 2019 was last year's best month for mega projects (although it only just beat May), providing five such groundbreakings totaling \$18.7 billion. The dollar volume difference between total nonresidential starts in August of this year versus the same month of last year was \$24.0 billion. The shortfall of \$24.0 billion was almost entirely due to the much stronger mega project profile last year.

Year-to-date total nonresidential starts in the latest month were -26.9% compared with the same January-August period in 2019. The -26.9% change is tracking closely ConstructConnect's -23.5% latest forecast for the full year. Year-to-date 'actual' nonresidential building starts are -34.4%, a little worse than the -29.7% change forecast for the full year. For 'civil' work, the actual year-to-date change is -12.9% compared with a -12.4% full-year projection. And the grand total percentage changes are -20.4% for ytd 'actual' versus -21.3% for full-year forecast.

### Construction has Reclaimed 56% of Jobs Lost in Spring

In March-April of this year, as originally reported, total employment in the U.S. fell by 20.5 million jobs, a decline of -13.5% (Table 2). The rearing up of the coronavirus contagion was, of course, the culprit. Since April, nearly nine million jobs have been reclaimed. Therefore, the jobs recovery-ratio, or the jobs 'claw-back' ratio (which has a feistier sound to it) is 43.8%.

While a good first stride has been taken in winning back the employment loss, 43.8% is still less than half the gap. Moreover, a rising proportion of remaining jobs losses are now being described as permanent rather temporary.

The construction sector's March-April jobs decline, at -12.8%, almost mirrored the total economy (-13.5%). The sector's jobs count figure in the Spring was -975,000. In the latest four months, construction has reclaimed 550,000 jobs. The jobs claw-back ratio for construction is now 56.4%.

### A Recovery Described as 'Uneven'

Graph 2 shows that on a year-over-year employment basis, construction (-3.9%) has fared fourth best among all major industrial sectors. It's behind only 'financial activities' (what was, until recently, a

TABLE 1: VALUE OF UNITED STATES

CONSTRUCTION STARTS — AUGUST 2020 (ConstructConnect®)

	Jan-Aug 2020 (\$ billions)	% Change Jan-Aug 20 vs Jan-Aug 19	% Change Aug 20 vs Aug 19	% Change Aug 20 vs Jul 20
Hotel/Motel	7.694	-47.4%	-62.1%	-28.6%
Retail/Shopping	8.378	-30.4%	-16.3%	28.5%
Parking Garage	1.222	-49.0%	-54.6%	-3.3%
Amusement	4.071	-20.8%	-24.3%	15.8%
Private Office	14.520	-35.4%	-22.0%	79.0%
Government Office	6.670	-15.3%	-19.7%	1.1%
Laboratory	1.419	-5.6%	-66.1%	-17.2%
Warehouse	14.778	-2.7%	-37.6%	45.1%
Miscellaneous Commercial *	5.169	-62.9%	-31.1%	-28.5%
<b>COMMERCIAL (big subset)</b>	<b>63.920</b>	<b>-32.8%</b>	<b>-32.9%</b>	<b>18.5%</b>
<b>INDUSTRIAL (Manufacturing)</b>	<b>11.118</b>	<b>-76.6%</b>	<b>-76.4%</b>	<b>179.1%</b>
Religious	1.020	-22.5%	-23.1%	34.3%
Hospital/Clinic	7.008	-46.1%	-82.5%	-23.4%
Nursing/Assisted Living	4.094	-36.6%	43.8%	82.0%
Library/Museum	2.969	20.3%	75.1%	-10.4%
Fire/Police/Courthouse/Prison	4.900	20.0%	30.9%	46.0%
Military	5.787	138.0%	71.1%	-7.3%
School/College	48.721	-14.3%	-16.2%	-11.2%
Miscellaneous Medical	4.647	-27.9%	-55.5%	20.1%
<b>INSTITUTIONAL</b>	<b>79.146</b>	<b>-14.9%</b>	<b>-25.4%</b>	<b>-2.5%</b>
Miscellaneous Non-residential	3.555	-23.9%	-26.1%	22.4%
<b>NONRESIDENTIAL BUILDING</b>	<b>157.740</b>	<b>-34.4%</b>	<b>-46.0%</b>	<b>18.4%</b>
Airport	4.176	-17.4%	10.7%	-6.5%
Road/Highway	45.768	-2.8%	-7.4%	-14.6%
Bridge	16.957	-21.4%	-43.7%	-46.4%
Dam/Marine	5.818	5.5%	83.9%	-0.4%
Water/Sewage	21.554	3.6%	31.1%	-3.3%
Miscellaneous Civil (power, pipelines, etc.)	16.787	-39.0%	-79.7%	-21.9%
<b>HEAVY ENGINEERING (Civil)</b>	<b>111.059</b>	<b>-12.9%</b>	<b>-38.7%</b>	<b>-17.0%</b>
<b>TOTAL NONRESIDENTIAL</b>	<b>268.798</b>	<b>-26.9%</b>	<b>-43.3%</b>	<b>1.2%</b>

\* Includes transportation terminals and sports arenas.

Source: ConstructConnect Research Group/Table: ConstructConnect.

booming stock market), 'government' (the epitome of job security) and 'retail trade' (thanks to online purchases and grocery store sales).

No doubt, though, the most alarming employment performance continues to be in the 'leisure and hospitality' sector, where jobs are -23.2% year over year. The word now being used most often to describe the recovery, as the economy's various sub-sector components proceed along their individual paths, is 'uneven'.

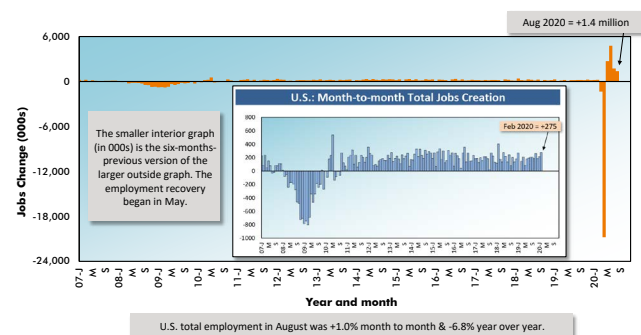
The Census Bureau's total put-in-place (PIP) construction spending dollars in July were +4.2% year to date. The seeming strength in the PIP results are an illusion. PIP numbers essentially capture work-in-process payments. They include a lot of carryover work that was initiated at least a year ago (i.e., the heightened mega project activity in 2019 that was alluded to earlier.)

Total PIP construction spending in the latest three reported months (i.e., to July), versus the preceding three months, annualized (projected for a full year), was -14.9%.

Also sounding a note of caution, total employment in the U.S. economy rose by 1.4 million jobs in August, but the construction sector's latest month-to-month employment climb was only +16,000. There's a looming threat that builders may soon burn their way through their backlogs. Much hope is being placed in the notion that an upsurge in housing starts will come to the rescue.

Continued on page 3

GRAPH 1: U.S. MONTH-TO-MONTH TOTAL EMPLOYMENT CHANGE



Latest data point is for August, 2020.

Data source: Payroll Survey, U.S. Bureau of Labor Statistics (BLS)/Chart: ConstructConnect.

TABLE 2: MONITORING THE U.S. EMPLOYMENT RECOVERY — AUGUST 2020

The Big Drop (as originally reported) April 2020 vs Feb 2020 (Feb was the last month unaffected by COVID-19)	Change in Number of Jobs (Millions)		% Change		Jobs Recovery (since April)	Claw Back (since April)
	Aug vs Feb 2020 (Feb was the last month unaffected by COVID-19)	Aug vs Jul 2020 (i.e., vs previous month)	Aug vs Feb 2020 (Feb was the last month unaffected by COVID-19)	Aug vs Jul 2020 (i.e., vs previous month)		
-20.500 -13.5%	Grand Total	-11.528 1.371	-7.6%	1.0%	8.972	43.8%
-17.200 -15.9%	Private Services-Providing	-9.455 0.984	-8.7%	1.0%	7.745	45.0%
-1.330 -10.4%	Manufacturing	-0.720 0.029	-5.6%	0.2%	0.610	45.9%
-0.975 -12.8%	Construction	-0.425 0.016	-5.6%	0.2%	0.550	56.4%
-2.107 -13.5%	Retail Trade	-0.655 0.249	-4.2%	1.7%	1.452	68.9%
-0.584 -10.3%	Transportation & Warehouse	-0.381 0.078	-6.7%	1.5%	0.203	34.8%
-0.262 -3.0%	Financial Activities	-0.191 0.036	-2.2%	0.4%	0.071	27.1%
-2.128 -9.9%	Professional & Business	-1.454 0.197	-6.8%	1.0%	0.674	31.7%
-0.254 -8.8%	Information Services	-0.312 0.015	-10.8%	0.6%	-0.058	n/a
-2.544 -10.4%	Education and Health	-1.457 0.147	-5.9%	0.6%	1.087	42.7%
-7.653 -46.8%	Leisure & Hospitality	-4.139 0.174	-24.5%	1.4%	3.514	45.9%
-0.980 -4.3%	Government	-0.831 0.344	-3.7%	1.6%	0.149	15.2%

Data source: Bureau of Labor Statistics (BLS)/Table: ConstructConnect.

Continued from page 2

## All Major Types of Nonresidential Construction being Challenged

August's +1.2% month-to-month (m/m) minor increase in total nonresidential starts resulted from gains in industrial (+179.1%) and commercial (+18.5%) that offset a sizable drop in heavy engineering/civil (-17.0%) and a small pullback in institutional (-2.5%). Industrial's big jump was due to the month's one mega project, a GM battery manufacturing plant, tied to electric vehicle sales, in Ohio (see page 5).

August 2020's dismal -43.3% record in total nonresidential starts versus August 2019 (y/y) originated in all the major type-of-structure sub-categories: industrial, -76.4% (there was a \$10 billion ethane cracker for ExxonMobil in Texas last year); engineering, -38.7%; commercial, -32.9%; and institutional, -25.4%.

The slightly more than one-quarter (-26.9%) year-to-date (ytd) decline in the latest month's total nonresidential starts was also widely dispersed: industrial, -76.6%; commercial, -32.8%; institutional, -14.9%; and engineering/civil, -12.9%.

## 'Water/Sewage' and 'Warehouse' Starts Draw Attention

The two nonresidential type-of-structure sub-categories with the highest dollar volumes of starts so far this year have been 'school/college' (\$48.7 billion) and 'road/highway' (\$45.8 billion). The former has accounted for 62% of institutional starts ytd; the latter, for 41% of engineering.

The three metrics for educational facility starts in August were -11.2% m/m, -16.2% y/y and -14.3% ytd. Street starts were also negative according to the three percentage-change measures, — -14.6% m/m, -7.4% y/y and -2.8% ytd, — although -2.8% for year to date, given the steep declines in many other sub-categories, hasn't been too bad. 'Water/sewage' starts (\$21.6 billion) have been the second biggest component of engineering work to date this year and its percentage changes have been relatively upbeat: -3.3% m/m, but +31.1% y/y and +3.6% ytd.

Within institutional, 'hospital/clinic' starts have been disappointing in the extreme: -23.4% m/m; -82.5% y/y; and -46.1% ytd. 'Nursing/assisted living' starts have also been down significantly ytd (-36.6%). But, in August, they did deliver good news m/m (+82.0%) and y/y (+43.8%). Before leaving institutional, it should be reported that military starts are +138.0% ytd.

One amazing feature of commercial starts to date this year has been the rising share (23%) taken by 'warehouse' work (+45.1% m/m; -37.6% y/y; and -2.7% ytd). 'Private offices' (+79.0% m/m, but -22.0% y/y and -35.4% ytd) have been relegated, although just barely, to second spot. Combined, those two sub-categories have accounted for 46% of commercial starts ytd.

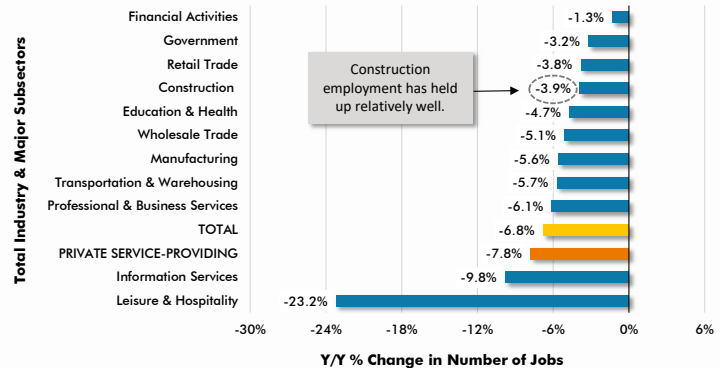
## Trend Graphs have taken a Nasty Turn

With only one exception ('water/sewage'), the twelve-month moving average trend-line curves on page 6 are moving downwards, some markedly so more than others. The type-of-structure sub-categories where 'starts' presently appear to be in most distress are 'retail', 'private office buildings' and 'miscellaneous civil'. 'Schools/colleges' and 'hospitals/clinics' are also clearly moving in the wrong direction. The recent dips in 'roads/highways' and 'bridges' are little more than hiccups for now, with possibly more momentous movements still to be revealed.

## Construction Workers left off Compensation 'Bullet Train'

Tables B-3 and B-8 of the monthly *Employment Situation* report record average hourly and average weekly wages for industry sectors. B-3 is for all employees (i.e., including bosses) on non-farm payrolls. B-8 is for 'production and non-supervisory personnel' only (i.e.,

GRAPH 2: Y/Y JOBS CHANGE, U.S. TOTAL INDUSTRY & MAJOR SUBSECTORS – AUGUST 2020 (BASED ON SEASONALLY ADJUSTED PAYROLL DATA)



Within the hardest-hit sector, 'leisure & hospitality' (-23.2% y/y), 'hotels/motels' was -37.0%, 'restaurants & bars', -18.7%, and 'amusements/gambling', -30.9%.

Data source: Payroll Survey, U.S. Bureau of Labor Statistics (Dept of Labor)/Chart: ConstructConnect.

it excludes bosses). For 'all jobs' and construction, there are eight relevant percentage changes to consider.

From Table B-3 (including supervisory personnel), 'all-jobs' earnings y/y in August were +4.7% hourly and +5.3% weekly. Construction workers missed some of the bounty at +3.3% hourly and +2.0% weekly. From Table B-8 (excluding bosses), the 'all jobs' pay increases were +4.9% hourly and +6.2% weekly. Again, at +3.0% hourly and a mere +1.4% weekly, construction workers were left off the 'bullet train'.

## 3 PPI Construction Costing Series — 2 on the March; 1 Tighter

August 2020's y/y results for three BLS Producer Price Index (PPI) series were as follows: 'construction materials special index', +2.0% (up from July's +0.2%); 'inputs to new construction index, excluding capital investment, labor and imports', +1.3% (compared with -0.3% in July); and 'final demand construction', +1.8% (down from +2.1% in July). While material costs may be on the march, it would seem fewer projects are driving tighter bidding.

The value of construction starts each month is derived from ConstructConnect's database of all active construction projects in the U.S. Missing project values are estimated with the help of RSMeans' building cost models. ConstructConnect's non-residential construction starts series, because it is comprised of total-value estimates for individual projects, some of which are super-large, has a history of being more volatile than many other leading indicators for the economy.

## 'Grand Total' Starts -20.4% Ytd

From Table 6 on page 8 of this report, ConstructConnect's total residential starts in August were -12.4% m/m, -20.3% y/y and -7.9% ytd. The latest month's multi-unit starts were -20.4% m/m, -53.1% y/y and -22.4% ytd. Single-family starts were -10.1% m/m, -2.6% y/y, and -1.4% ytd. (Based on a recent upsurge in housing starts, there was a substantial positive revision to ConstructConnect's July single-family starts value.) Combining residential and nonresidential, 'Grand Total' construction starts in August 2020 were -4.9% m/m, -35.7% y/y and -20.4% ytd. ♦

Alex Carrick

ConstructConnect has moved to a better-targeted and research-assigned 'start' date. (Prior to January 2017, the 'start' date was recorded as occurring within 30 to 60 days of the announced bid date.) In concept, a 'start' is equivalent to ground being broken for a project to proceed. If work is abandoned or re-bid, the 'start' date is revised to reflect the new information.

Alex Carrick is Chief Economist for ConstructConnect. He has delivered presentations throughout North America on the U.S., Canadian and world construction outlooks. Mr. Carrick has been with the company since 1985. Links to his numerous articles are featured on [Twitter @ConstructConnx](#), which has 50,000 followers.

# INSIGHT view of starts statistics

TABLE 3: VALUE OF UNITED STATES CONSTRUCTION STARTS  
ConstructConnect® INSIGHT VERSION — AUGUST 2020  
ARRANGED TO MATCH THE ALPHABETICAL CATEGORY DROP-DOWN MENUS IN INSIGHT

	Jan-Aug 2020 (\$ billions)	% Change Jan-Aug 20 vs Jan-Aug 19	% Change Aug 20 vs Aug 19	% Change Aug 20 vs Jul 20
<b>Summary</b>				
CIVIL	111.059	-12.9%	-38.7%	-17.0%
NONRESIDENTIAL BUILDING	157.740	-34.4%	-46.0%	18.4%
RESIDENTIAL	178.168	-7.9%	-20.3%	-12.4%
GRAND TOTAL	446.966	-20.4%	-35.7%	-4.9%
<b>Verticals</b>				
Airport	4.176	-17.4%	10.7%	-6.5%
All Other Civil	14.135	-21.3%	-74.1%	-14.8%
Bridges	16.957	-21.4%	-43.7%	-46.4%
Dams / Canals / Marine Work	5.818	5.5%	83.9%	-0.4%
Power Infrastructure	2.652	-72.3%	-94.0%	-59.3%
Roads	45.768	-2.8%	-7.4%	-14.6%
Water and Sewage Treatment	21.554	3.6%	31.1%	-3.3%
<b>CIVIL</b>	111.059	-12.9%	-38.7%	-17.0%
Offices (private)	14.520	-35.4%	-22.0%	79.0%
Parking Garages	1.222	-49.0%	-54.6%	-3.3%
Transportation Terminals	1.505	-82.7%	-73.4%	22.4%
<b>Commercial (small subset)</b>	17.247	-48.6%	-33.0%	67.3%
Amusement	4.071	-20.8%	-24.3%	15.8%
Libraries / Museums	2.969	20.3%	75.1%	-10.4%
Religious	1.020	-22.5%	-23.1%	34.3%
Sports Arenas / Convention Centers	3.664	-29.8%	26.7%	-36.1%
<b>Community</b>	11.725	-17.1%	3.4%	-16.4%
College / University	11.589	-13.9%	-20.7%	-35.9%
Elementary / Pre School	15.420	-8.0%	-3.4%	9.7%
Jr / Sr High School	20.431	-19.0%	-24.5%	-10.3%
Special / Vocational	1.280	-9.0%	38.5%	61.9%
<b>Educational</b>	48.721	-14.3%	-16.2%	-11.2%
Courthouses	1.226	51.5%	-1.2%	125.2%
Fire and Police Stations	2.147	3.8%	35.8%	12.2%
Government Offices	6.670	-15.3%	-19.7%	1.1%
Prisons	1.526	26.6%	59.4%	58.1%
<b>Government</b>	11.569	-3.2%	-2.5%	17.7%
Industrial Labs / Labs / School Labs	1.419	-5.6%	-66.1%	-17.2%
Manufacturing	11.118	-76.6%	-76.4%	179.1%
Warehouses	14.778	-2.7%	-37.6%	45.1%
<b>Industrial</b>	27.314	-57.4%	-69.6%	100.7%
Hospitals / Clinics	7.008	-46.1%	-82.5%	-23.4%
Medical Misc.	4.647	-27.9%	-55.5%	20.1%
Nursing Homes	4.094	-36.6%	43.8%	82.0%
<b>Medical</b>	15.749	-39.2%	-62.3%	16.6%
<b>Military</b>	5.787	138.0%	71.1%	-7.3%
Hotels	7.694	-47.4%	-62.1%	-28.6%
Retail Misc.	3.555	-23.9%	-26.1%	22.4%
Shopping	8.378	-30.4%	-16.3%	28.5%
<b>Retail</b>	19.627	-37.4%	-37.4%	5.7%
<b>NONRESIDENTIAL BUILDING</b>	157.740	-34.4%	-46.0%	18.4%
Multi-Family	46.665	-22.4%	-53.1%	-20.4%
Single-Family	131.502	-1.4%	-2.6%	-10.1%
<b>RESIDENTIAL</b>	178.168	-7.9%	-20.3%	-12.4%
<b>NONRESIDENTIAL</b>	268.798	-26.9%	-43.3%	1.2%
<b>GRAND TOTAL</b>	446.966	-20.4%	-35.7%	-4.9%

Table 1 conforms to the type-of-structure ordering adopted by many firms and organizations in the industry. Specifically, it breaks nonresidential building into ICI work (i.e., industrial, commercial and institutional), since each has its own set of economic and demographic drivers.

Table 3 presents an alternative, perhaps more user-friendly and intuitive type-of-structure ordering that matches how the data appears in ConstructConnect's on-line product 'Insight'.

Source: ConstructConnect/Table: ConstructConnect.



## “Top Ten” projects of the month

TABLE 4: ConstructConnect's TOP 10 PROJECT STARTS IN AUGUST 2020

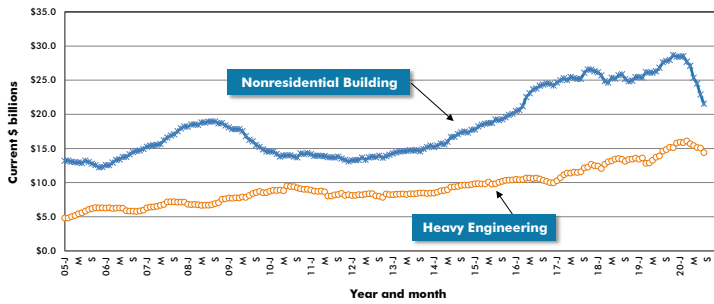
LOCATION (EAST TO WEST)	TYPE OF CONSTRUCTION	DESCRIPTION	SQUARE FEET 000S*	DOLLARS 000,000S
<b>Massachusetts</b> Boston	Commercial	Massachusetts Turnpike Office and Hotel Complex (4 structures; 33 stories) Boylston St and Massachusetts Ave Samuels & Associates	657	\$700
<b>Ohio</b> Warren	Industrial	Ultium Cells Manufacturing Campus (1 structure; 2 stories) 7400 Tod Ave SW General Motors Corp.	2,800	\$2,300
<b>Tennessee</b> Gallatin	Commercial	Project Woolhawk / Facebook Data Center (1 structure; 1 story) Gateway Dr Facebook Inc. - Corporate Headquarters	982	\$800
<b>Wisconsin</b> Milwaukee	Industrial	Komatsu Corporate Campus - Milwaukee Harbor District (5 structures; 3 stories) W Kinnickinnic River and S Greenfield Ave Komatsu Mining Corp	700	\$285
<b>Texas</b> Mission	Civil/Engineering	I-2 and I-69C Interchange (Pharr Interchange Project) - Texas Department of Transportation (2 structures) Multiple Locations Texas Department of Transportation - Pharr District Office	*	\$303
<b>Arizona</b> Phoenix	Civil/Engineering	Northwest Phase II Light Rail Extension (1 structure) Multiple Locations Valley Metro	*	\$401
<b>Washington</b> Redmond	Civil/Engineering	Downtown Redmond Link Extension Design-Build (3 structures) 166th Ave NE Sound Transit	*	\$731
Seattle	Residential	3rd Avenue First Light Mixed-Use Tower (5 structures; 48 stories; 459 units) 2000 3rd Ave Westbank Project Corp.	681	\$450
<b>California</b> San Diego	Commercial	San Diego State University (SDSU) Aztec Stadium (1 structure; 35,000 seats) 5500 Campanile Dr JMI Sports, LLC	1,000	\$310
San Jose	Institutional	Agnews Campus High School - Increment 1 - Group 1 (6 structures; 11 stories) 3500 Zanker Rd Santa Clara Unified School District	245	\$250
<b>TOTALS:</b>			<b>7,065</b>	<b>\$6,530</b>

\*A square footage measure does not apply for alteration, some forms of industrial (e.g., petrochemical) and most engineering/civil work.

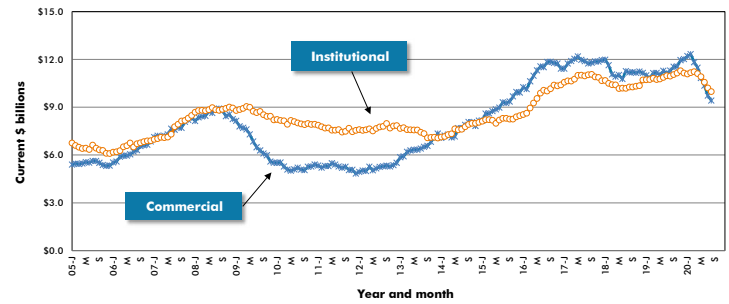
Source: ConstructConnect/Table: ConstructConnect.

## Trend graphs for 12 key categories

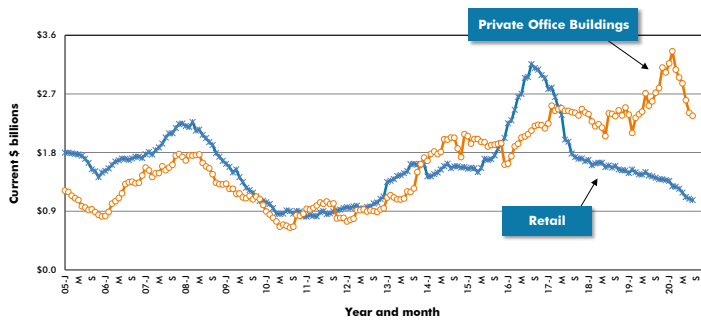
**GRAPH 3: U.S. NONRESIDENTIAL CONSTRUCTION STARTS — ConstructConnect® (12-MONTH MOVING AVERAGES)**



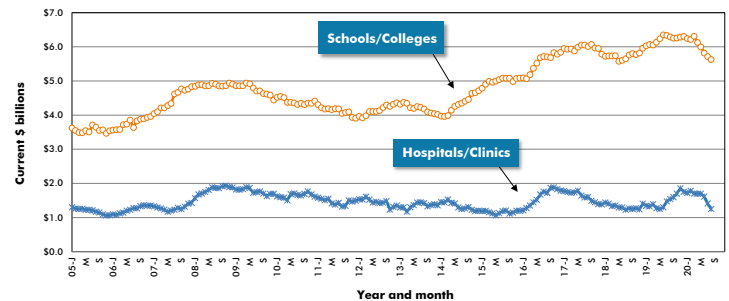
**GRAPH 4: U.S. COMMERCIAL AND INSTITUTIONAL CONSTRUCTION STARTS — ConstructConnect® (12-MONTH MOVING AVERAGES)**



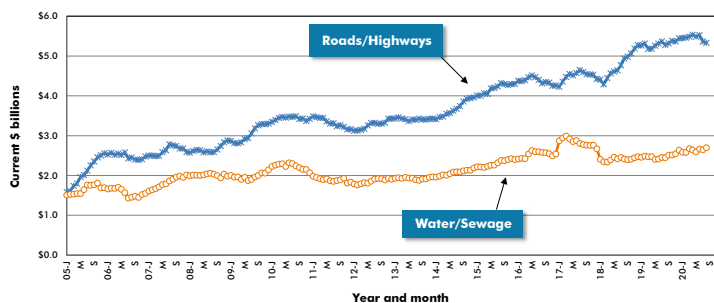
**GRAPH 5: U.S. RETAIL AND PRIVATE OFFICE BUILDING CONSTRUCTION STARTS — ConstructConnect® (12-MONTH MOVING AVERAGES)**



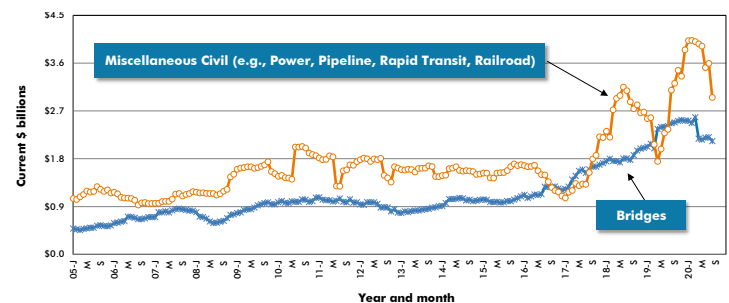
**GRAPH 6: U.S. HOSPITAL/CLINIC AND SCHOOL/COLLEGE CONSTRUCTION STARTS — ConstructConnect® (12-MONTH MOVING AVERAGES)**



**GRAPH 7: U.S. ROAD/HIGHWAY AND WATER/SEWAGE CONSTRUCTION STARTS — ConstructConnect® (12-MONTH MOVING AVERAGES)**



**GRAPH 8: U.S. BRIDGES AND MISCELLANEOUS CIVIL CONSTRUCTION STARTS — ConstructConnect® (12-MONTH MOVING AVERAGES)**



The last data points in all the graphs on this page are for August, 2020.

Source: ConstructConnect/Charts: ConstructConnect.

## Regional starts table

TABLE 5: U.S. YEAR-TO-DATE REGIONAL STARTS NONRESIDENTIAL CONSTRUCTION\* — ConstructConnect®

	Jan-Aug 2019	Jan-Aug 2020	% Change
Connecticut	\$3,955,008,101	\$2,618,882,223	-33.8%
Maine	\$1,399,195,080	\$1,152,462,614	-17.6%
Massachusetts	\$9,790,521,098	\$6,336,329,947	-35.3%
New Hampshire	\$1,230,364,376	\$657,598,791	-46.6%
Rhode Island	\$678,643,448	\$566,455,565	-16.5%
Vermont	\$302,653,264	\$445,224,948	47.1%
<b>Total New England</b>	<b>\$17,356,385,367</b>	<b>\$11,776,954,088</b>	<b>-32.1%</b>
New Jersey	\$4,872,641,070	\$4,598,865,277	-5.6%
New York	\$16,920,037,375	\$12,844,607,744	-24.1%
Pennsylvania	\$11,387,084,448	\$6,868,150,756	-39.7%
<b>Total Middle Atlantic</b>	<b>\$33,179,762,893</b>	<b>\$24,311,623,777</b>	<b>-26.7%</b>
<b>TOTAL NORTHEAST</b>	<b>\$50,536,148,260</b>	<b>\$36,088,577,865</b>	<b>-28.6%</b>
Illinois	\$12,149,452,658	\$10,462,636,562	-13.9%
Indiana	\$5,412,298,882	\$5,531,810,017	2.2%
Michigan	\$9,900,456,174	\$5,197,595,980	-47.5%
Ohio	\$10,358,212,760	\$10,113,237,365	-2.4%
Wisconsin	\$7,876,556,894	\$6,412,864,577	-18.6%
<b>Total East North Central</b>	<b>\$45,696,977,368</b>	<b>\$37,718,144,501</b>	<b>-17.5%</b>
Iowa	\$4,766,788,913	\$3,871,444,240	-18.8%
Kansas	\$3,572,920,605	\$2,962,396,274	-17.1%
Minnesota	\$8,172,073,769	\$5,999,876,580	-26.6%
Missouri	\$6,062,903,767	\$7,550,586,497	24.5%
Nebraska	\$2,789,775,243	\$3,325,940,128	19.2%
North Dakota	\$1,636,942,298	\$2,036,309,175	24.4%
South Dakota	\$1,422,836,028	\$893,879,975	-37.2%
<b>Total West North Central</b>	<b>\$28,424,240,623</b>	<b>\$26,640,432,869</b>	<b>-6.3%</b>
<b>TOTAL MIDWEST</b>	<b>\$74,121,217,991</b>	<b>\$64,358,577,370</b>	<b>-13.2%</b>
Delaware	\$873,368,556	\$997,339,256	14.2%
District of Columbia	\$1,446,931,991	\$687,970,030	-52.5%
Florida	\$24,691,334,883	\$15,232,229,545	-38.3%
Georgia	\$13,868,481,930	\$7,607,358,967	-45.1%
Maryland	\$5,129,644,259	\$5,002,798,566	-2.5%
North Carolina	\$9,848,958,427	\$6,810,659,864	-30.8%
South Carolina	\$4,897,617,883	\$3,567,774,441	-27.2%
Virginia	\$11,093,929,062	\$7,357,592,331	-33.7%
West Virginia	\$1,216,012,457	\$1,797,915,540	47.9%
<b>Total South Atlantic</b>	<b>\$73,066,279,448</b>	<b>\$49,061,638,540</b>	<b>-32.9%</b>
Alabama	\$6,745,036,808	\$3,445,570,809	-48.9%
Kentucky	\$4,720,189,168	\$2,199,415,071	-53.4%
Mississippi	\$1,852,417,856	\$2,092,550,228	13.0%
Tennessee	\$6,074,970,282	\$5,875,718,743	-3.3%
<b>Total East South Central</b>	<b>\$19,392,614,114</b>	<b>\$13,613,254,851</b>	<b>-29.8%</b>
Arkansas	\$2,276,891,550	\$2,720,368,148	19.5%
Louisiana	\$7,323,614,768	\$3,236,223,808	-55.8%
Oklahoma	\$3,602,235,106	\$2,724,467,639	-24.4%
Texas	\$62,807,884,332	\$30,689,751,226	-51.1%
<b>Total West South Central</b>	<b>\$76,010,625,756</b>	<b>\$39,370,810,821</b>	<b>-48.2%</b>
<b>TOTAL SOUTH</b>	<b>\$168,469,519,318</b>	<b>\$102,045,704,212</b>	<b>-39.4%</b>
Arizona	\$6,094,694,866	\$5,692,886,282	-6.6%
Colorado	\$6,412,743,175	\$5,460,690,197	-14.8%
Idaho	\$1,660,374,939	\$1,016,334,154	-38.8%
Montana	\$969,982,085	\$1,152,142,870	18.8%
Nevada	\$4,966,290,154	\$2,716,968,409	-45.3%
New Mexico	\$1,243,830,468	\$1,710,921,904	37.6%
Utah	\$3,837,047,797	\$4,663,432,170	21.5%
Wyoming	\$3,864,638,596	\$796,819,300	-79.4%
<b>Total Mountain</b>	<b>\$29,049,602,080</b>	<b>\$23,210,195,286</b>	<b>-20.1%</b>
Alaska	\$793,415,818	\$961,720,467	21.2%
California	\$27,149,975,836	\$26,771,693,825	-1.4%
Hawaii	\$1,686,977,803	\$1,425,831,397	-15.5%
Oregon	\$4,169,003,628	\$3,148,426,359	-24.5%
Washington	\$11,936,557,304	\$10,787,646,410	-9.6%
<b>Total Pacific</b>	<b>\$45,735,930,389</b>	<b>\$43,095,318,458</b>	<b>-5.8%</b>
<b>TOTAL WEST</b>	<b>\$74,785,532,469</b>	<b>\$66,305,513,744</b>	<b>-11.3%</b>
<b>TOTAL U.S.</b>	<b>\$367,912,418,038</b>	<b>\$268,798,373,191</b>	<b>-26.9%</b>

\*Figures above are comprised of non-res building and engineering (i.e., residential is omitted).

Source: ConstructConnect/Table: ConstructConnect.

## Detailed national table

TABLE 6: VALUE OF U.S. NATIONAL CONSTRUCTION STARTS — AUGUST 2020 — ConstructConnect®  
BILLIONS OF CURRENT \$\$, NOT SEASONALLY ADJUSTED (NSA)

	Latest month actuals			Moving averages (placed in end month)						Year to Date	
	Jun 20	Jul 20	Aug 20	Jun 20	3-months Jul 20	Aug 20	Jun 20	12-months Jul 20	Aug 20	Jan-Aug 2019	Jan-Aug 2020
Single Family	18,181	19,215	17,280	15,646	17,391	18,225	16,370	16,443	16,405	133,429	131,502
month-over-month % change	23.0%	5.7%	-10.1%	3.6%	11.2%	4.8%	0.0%	0.4%	-0.2%		
year-over-year % change	0.3%	4.8%	-2.6%	-12.1%	-2.6%	0.9%	1.5%	1.9%	1.8%	-6.3%	-1.4%
Apartment	6,123	5,636	4,484	5,529	5,749	5,414	7,583	7,509	7,086	60,116	46,665
month-over-month % change	11.6%	-8.0%	-20.4%	-2.8%	4.0%	-5.8%	-2.0%	-1.0%	-5.6%		
year-over-year % change	-23.4%	-13.6%	-53.1%	-23.6%	-1.4%	-39.5%	-1.6%	-2.4%	-22.4%		
<b>TOTAL RESIDENTIAL</b>	<b>24,305</b>	<b>24,851</b>	<b>21,764</b>	<b>21,174</b>	<b>23,140</b>	<b>23,640</b>	<b>23,953</b>	<b>23,953</b>	<b>23,491</b>	<b>193,545</b>	<b>178,168</b>
month-over-month % change	19.9%	2.2%	-12.4%	1.8%	9.3%	2.2%	-0.6%	0.0%	-1.9%		
year-over-year % change	-6.9%	0.0%	-20.3%	-15.4%	-5.8%	-9.4%	0.5%	0.8%	-1.5%	-5.1%	-7.9%
Hotel/Motel	0,492	0,764	0,545	0,627	0,559	0,600	1,516	1,452	1,378	14,613	7,694
month-over-month % change	17.1%	55.3%	-28.6%	-23.8%	-10.9%	7.5%	-7.1%	-4.2%	-5.1%		
year-over-year % change	-73.8%	-50.2%	-62.1%	-65.8%	-67.1%	-62.8%	-21.3%	-23.9%	-27.2%	-19.5%	-47.4%
Retail/Shopping	0,958	0,886	1,138	1,025	0,930	0,994	1,116	1,090	1,072	12,042	8,378
month-over-month % change	1.3%	-7.5%	28.5%	-9.4%	-9.3%	6.9%	-5.8%	-2.3%	-1.7%		
year-over-year % change	-46.2%	-26.1%	-16.3%	-38.1%	-39.9%	-31.3%	-25.5%	-24.8%	-25.3%	-8.4%	-30.4%
Parking Garages	0,164	0,106	0,103	0,149	0,164	0,124	0,196	0,176	0,165	2,396	1,222
month-over-month % change	-25.7%	-35.5%	-3.3%	5.3%	9.9%	-24.1%	-6.9%	-10.6%	-5.9%		
year-over-year % change	-51.3%	-70.1%	-54.6%	-56.6%	-54.0%	-59.4%	-28.0%	-38.0%	-42.6%	32.5%	-49.0%
Amusement	0,506	0,323	0,375	0,511	0,395	0,401	0,627	0,552	0,542	5,142	4,071
month-over-month % change	42.4%	-36.1%	15.8%	-5.8%	-22.8%	1.6%	-3.0%	-11.9%	-1.8%		
year-over-year % change	-31.1%	-73.5%	-24.3%	-17.1%	-51.9%	-50.8%	-2.4%	-21.7%	-23.6%	-0.8%	-20.8%
Office	1,544	1,112	1,991	1,409	1,182	1,549	2,602	2,411	2,364	22,477	14,520
month-over-month % change	73.5%	-27.9%	79.0%	11.4%	-16.1%	31.1%	-9.0%	-7.4%	-1.9%		
year-over-year % change	-66.8%	-67.4%	-22.0%	-57.1%	-64.6%	-56.2%	-4.0%	-4.3%	-8.5%	5.2%	-35.4%
Governmental Offices	0,857	0,935	0,946	0,843	0,857	0,913	0,962	0,897	0,877	7,871	6,670
month-over-month % change	10.0%	9.1%	1.1%	-3.1%	1.7%	6.2%	-1.8%	-6.8%	-2.2%		
year-over-year % change	-19.8%	-45.8%	-19.7%	-13.2%	-30.4%	-31.0%	-4.6%	-9.8%	-12.1%	14.0%	-15.3%
Laboratories	0,231	0,163	0,135	0,125	0,157	0,176	0,210	0,215	0,193	1,503	1,419
month-over-month % change	204.6%	-29.5%	-17.2%	23.7%	25.1%	12.5%	5.3%	2.5%	-10.2%		
year-over-year % change	121.9%	61.5%	-66.1%	24.7%	16.0%	-12.3%	-3.8%	19.6%	-1.6%	-26.9%	-5.6%
Warehouse	2,117	1,129	1,638	2,155	1,737	1,628	1,963	1,929	1,847	15,187	14,778
month-over-month % change	7.7%	-46.7%	45.1%	12.0%	-19.4%	-6.3%	-0.4%	-1.7%	-4.3%		
year-over-year % change	-4.8%	-26.5%	-37.6%	-5.9%	-2.7%	-23.5%	5.8%	7.5%	0.0%	2.8%	-2.7%
Misc Commercial	0,653	0,955	0,683	0,502	0,674	0,764	1,157	1,005	0,980	13,915	5,169
month-over-month % change	57.7%	46.3%	-28.5%	-0.7%	34.3%	13.3%	1.0%	-13.1%	-2.6%		
year-over-year % change	27.7%	-65.6%	-31.1%	-76.0%	-75.5%	-46.5%	-2.8%	-22.5%	-27.4%	39.1%	-62.9%
<b>TOTAL COMMERCIAL</b>	<b>7,522</b>	<b>6,374</b>	<b>7,553</b>	<b>7,547</b>	<b>6,654</b>	<b>7,150</b>	<b>10,350</b>	<b>9,726</b>	<b>9,417</b>	<b>95,147</b>	<b>63,920</b>
month-over-month % change	24.0%	-15.3%	18.5%	0.6%	9.4%	7.4%	-4.4%	-6.0%	-3.2%		
year-over-year % change	-43.4%	-54.0%	-32.9%	-44.5%	-51.3%	-44.1%	-8.3%	-12.6%	-16.6%	1.9%	-32.8%
<b>TOTAL INDUSTRIAL (Manufacturing)</b>	<b>0,535</b>	<b>1,048</b>	<b>2,923</b>	<b>1,116</b>	<b>1,247</b>	<b>1,502</b>	<b>2,978</b>	<b>2,393</b>	<b>1,602</b>	<b>47,467</b>	<b>11,118</b>
month-over-month % change	-75.2%	95.6%	179.1%	-6.3%	11.8%	20.4%	-1.2%	-19.7%	-33.0%		
year-over-year % change	-45.2%	-87.0%	-76.4%	-78.5%	-82.7%	-79.0%	-16.7%	-42.2%	-66.5%	83.8%	-76.6%
Religious	0,096	0,091	0,123	0,096	0,103	0,103	0,140	0,136	0,133	1,317	1,020
month-over-month % change	-22.0%	-4.8%	34.3%	-38.2%	7.6%	-0.1%	-6.3%	-3.0%	-2.3%		
year-over-year % change	-54.1%	-35.4%	-23.1%	-47.6%	-43.0%	-39.2%	-18.3%	-20.9%	-22.1%	-10.1%	-22.5%
Hospitals/Clinics	0,942	0,532	0,408	0,942	0,870	0,627	1,616	1,413	1,252	13,014	7,008
month-over-month % change	-17.1%	-43.5%	-23.4%	-8.2%	-7.6%	-27.9%	-4.9%	-12.4%	-11.4%		
year-over-year % change	-51.3%	-82.1%	-62.5%	-27.2%	-56.7%	-74.0%	24.1%	-4.2%	-18.8%	14.1%	-46.1%
Nursing/Assisted Living	0,388	0,310	0,565	0,498	0,397	0,421	0,620	0,589	0,603	6,453	4,094
month-over-month % change	-21.4%	-19.9%	82.0%	-9.7%	-20.3%	6.0%	-3.0%	-4.9%	2.4%		
year-over-year % change	-37.1%	-54.3%	43.8%	-38.1%	-46.8%	-25.2%	-27.9%	-30.7%	-27.9%	-8.1%	-36.6%
Libraries/Museums	0,296	0,223	0,200	0,301	0,289	0,240	0,392	0,371	0,378	2,468	2,969
month-over-month % change	-14.8%	-24.8%	-10.4%	14.0%	-4.1%	-17.1%	-1.2%	-5.3%	1.9%		
year-over-year % change	-16.4%	-52.6%	75.1%	-24.4%	-35.5%	-23.4%	43.9%	25.2%	30.0%	43.1%	20.3%
Fire/Police/Courthouse/Prison	0,540	0,547	0,799	0,501	0,512	0,629	0,621	0,631	0,647	4,084	4,900
month-over-month % change	20.4%	1.4%	46.0%	-8.2%	2.2%	22.9%	-1.0%	1.7%	2.5%		
year-over-year % change	-11.8%	30.4%	30.9%	-3.6%	-3.5%	4.9%	-5.0%	11.8%	5.0%	-22.2%	20.0%
Military	0,536	0,608	0,554	0,993	0,544	0,570	0,668	0,689	0,709	2,431	5,787
month-over-month % change	10.0%	13.4%	-7.3%	4.9%	-45.2%	4.7%	2.3%	3.1%	2.8%		
year-over-year % change	49.5%	70.1%	71.1%	244.7%	64.2%	63.3%	60.4%	66.0%	75.7%	-13.8%	138.0%
Schools/Colleges	9,329	5,502	4,888	7,444	7,299	6,573	5,820	5,710	5,631	56,846	48,721
month-over-month % change	32.0%	-41.0%	-11.2%	10.0%	-1.9%	-9.9%	-3.0%	-1.9%	-1.4%		
year-over-year % change	-18.8%	-19.3%	-16.2%	-20.9%	-18.6%	-18.3%	-8.3%	-9.8%	-10.5%	7.5%	-14.3%
Misc Medical	0,413	0,305	0,366	0,593	0,498	0,361	0,693	0,667	0,629	6,442	4,647
month-over-month % change	-46.7%	-26.3%	20.1%	-30.3%	-16.1%	-27.4%	-7.3%	-3.8%	-5.7%		
year-over-year % change	-61.2%	-50.7%	-55.5%	-42.0%	-45.6%	-56.8%	-19.3%	-20.0%	-25.2%	-15.2%	-27.9%
<b>TOTAL INSTITUTIONAL</b>	<b>12,540</b>	<b>8,119</b>	<b>7,912</b>	<b>11,368</b>	<b>10,512</b>	<b>9,523</b>	<b>10,569</b>	<b>10,206</b>	<b>9,982</b>	<b>93,055</b>	<b>79,146</b>
month-over-month % change	-15.3%	-35.3%	-2.5%	13.2%	-7.5%	-9.4%	-3.1%	-3.4%	-2.2%		
year-over-year % change	-24.6%	-34.9%	-25.4%	-18.7%	-25.6%	-28.1%	-2.8%	-7.0%	-8.9%	3.2%	-14.9%
Misc Non Residential	0,485	0,366	0,448	0,426	0,409	0,433	0,577	0,557	0,544	4,673	3,555
month-over-month % change	28.6%	-24.5%	22.4%	1.1%	-4.0%	5.8%	-1.8%	-3.4%	-2.4%		
year-over-year % change	-21.2%	-39.1%	-26.1%	-32.4%	-32.3%	-28.7%	-0.8%	-1.3%	-5.0%	-6.7%	-23.9%
<b>TOTAL NON-RES BUILDING</b>	<b>21,082</b>	<b>15,906</b>	<b>18,836</b>	<b>20,257</b>	<b>18,823</b>	<b>18,608</b>	<b>24,474</b>	<b>22,883</b>	<b>21,546</b>	<b>240,343</b>	<b>157,740</b>
month-over-month % change	8.2%	-24.6%	18.4%	1.6%	-7.1%	-1.1%	-3.4%	-6.5%	-5.8%		
year-over-year % change	-33.1%	-54.6%	-46.0%	-38.7%	-47.2%	-44.9%	-7.0%	-14.6%	-22.0%	12.1%	-34.4%
Airports	0,882	0,810	0,757	0,576	0,742	0,816	0,556	0,536	0,542	5,053	4,176
month-over-month % change	64.9%	-8.2%	-6.5%	25.1%	29.0%	10.0%	4.6%	-3.5%	1.1%		
year-over-year % change	49.3%	-22.3%	10.7%	-4.6%	-3.7%	5.7%	-3.7%	-12.4%	-12.2%	2.9%	-17.4%
Roads/Highways	7,137	5,959	5,088	7,199	6,630	6,061	5,524	5,364	5,330	47,097	45,768
month-over-month % change	5.1%	-16.5%	-14.6%	7.9%	-7.9%	-8.6%	0.7%	-2.9%	-0.6%		
year-over-year % change	6.7%	-24.3%	-7.4%	2.1%	-9.2%	-9.3%	4.0%	0.0%	1.0%	0.2%	-2.8%
Bridges	2,716	2,158	1,157	2,172	2,293	2,010	2,193	2,206	2,131	21,566	16,957
month-over-month % change	35.4%	-20.5%	-46.4%	-3.8%	5.6%	-12.3%	1.7%	0.6%	-3.4%		
year-over-year % change	18.9%	7.9%	-43.7%	-41.6%	5.1%	-4.9%	-8.6%	-8.5%	-13.7%	35.0%	-21.4%
Dams/Marine	0,663	0,825	0,822	0,754	0,789	0,770	0,684	0,707	0,738	5,516	5,818
month-over-month % change	-24.4%	24.5%	-0.4%	0.6%	4.5%	-2.3%	-5.1%	3.3%	4.4%		
year-over-year % change	-40.0%	49.0%	83.9%	-35.9%	-36.4%	9.8%	-4.2%	-1.4%	5.2%	47.4%	5.5%
Water/Sewage	3,428	2,815	2,741	2,890	2,851	3,001	2,661	2,644	2,698	20,806	21,554
month-over-month % change	49.7%	-17.3%	-2.3%	2.9%	-1.3%	5.3%	2.8%	-0.6%	2.0%		
year-over-year % change	33.6%	-6.8%	31.1%	-1.8%	0.4%	17.0%	10.2%	7.9%	10.2%	-1.3%	3.6%
Misc Civil (Power, etc.)	1,796	2,515	1,965	2,284	2,706	2,092	3,515	3,596	2,954	27,534	16,787
month-over-month % change	-52.8%	40.1%	-21.9%	2.4%	18.5%	-22.7%	-10.3%	2.3%	-17.9%		
year-over-year % change	-73.0%	63.8%	-79.7%	-46.1%	-35.1%	-64.9%	53.9%	52.8%	-4.5%	22.0%	-39.0%
<b>TOTAL ENGINEERING (Civil)</b>	<b>16,622</b>	<b>15,102</b>	<b>12,530</b>	<b>15,875</b>	<b>16,011</b>	<b>14,751</b>	<b>15,132</b>	<b>15,053</b>	<b>14,393</b>	<b>127,570</b>	<b>111,059</b>
month-over-month % change	1.9%	-9.1%	-17.0%	4.6%	0.9%	-7.9%	-1.8%	-0.5%	-4.4%		
year-over-year % change	-16.4%	-5.9%	-38.7%	-19.6%	-13.5%	-21.5%	10.5%	8.2%	-1.5%	10.7%	-12.9%
<b>GRAND TOTAL</b>	<b>62,009</b>	<b>55,859</b>	<b>53,129</b>	<b>57,306</b>	<b>57,973</b>	<b>56,999</b>	<b>63,559</b>	<b>61,889</b>	<b>59,430</b>	<b>561,457</b>	<b>446,966</b>
month-over-month % change	-10.6%	-9.9%	-4.9%	2.0%	1.2%	-1.7%	-2.0%	-2.6%	-1.1%		
year-over-year % change	-20.0%	-26.4%	-35.7%	-26.4%	-27.6%	-27.6%	-0.4%	-4.0%	-10.0%	5.2%	-20.4%
<b>NON-RES BLDG + ENGINEERING</b>	<b>37,704</b>	<b>31,008</b>	<b>31,365</b>	<b>36,132</b>	<b>34,833</b>	<b>33,359</b>	<b>39,606</b>	<b>37,936</b>	<b>35,939</b>	<b>367,912</b>	<b>268,798</b>
month-over-month % change	5.4%	-17.8%	1.2%	2.9%	-3.6%	-4.2%	-2.8%	-4.2%	-5.3%		
year-over-year % change	-26.6%	-39.3%	-43.3%	-31.6%	-35.6%	-36.6%	-1.0%	-6.8%	-14.9%	11.6%	-26.9%