

# Construction Industry Snapshot

Issued: May 2020  
(based on April 2020 Starts Stats)



Marketing Analytics Team

## April Nonresidential Construction Starts Sink Lower Ytd, -16.7%

ConstructConnect announced today that the latest month's volume of construction starts, excluding residential work, was \$32.6 billion, an increase of +2.3% versus March's figure of \$31.8 billion.

Other time comparisons, however, provide less comfort. April 2020's nonresidential starts level was -30.7% versus April 2019. Year-to-date nonresidential starts in the latest month were -16.7% when held up against January-April 2019.



Comparison	Commercial	Retail	Private Office	Hotel & Motel	Industrial	Institutional	Schools	Hospitals & Clinics	Heavy Engineering	Total Non-Residential
Apr 20 vs Mar 20	+7%	-1%	+70%	-9%	-40%	+4%	-9%	-22%	0%	+2%
Jan-Apr 20 vs Jan-Apr 19	-22%	-31%	-17%	-35%	-80%	-7%	-12%	-27%	-3%	-17%
Jan-Apr 19 vs Jan-Apr 18	0%	-11%	-11%	+9%	+143%	+1%	+10%	-26%	-14%	0%

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## April's Notable Points

- On an April 2020 over April 2019 basis, with total nonresidential starts at -30.7%, industrial was down the most (-92.5%), but none of the other major type-of-structure sub-categories had any reason to boast either. Commercial was -42.5%; heavy engineering/civil, -27.1%; and institutional, -13.6%.
- As for total nonresidential starts being -16.7% year to date in the latest month, engineering was nearly level, -3.2%, and institutional was off, but not by that much, -6.8%. Commercial, though, was -22.4%, and industrial, -79.6%.

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## April Nonresidential Construction Starts Sink Lower Ytd, -16.7%

### M/M Fine, but Other Time Comparisons Grim

ConstructConnect announced today that the latest month's volume of construction starts, excluding residential work, was \$32.6 billion (green shaded box, Table 5, page 8), an increase of +2.3% versus March's figure of \$31.8 billion (originally reported as \$30.8 billion).

Amidst so much bad economic news, arising from the coronavirus pandemic, the slight increase in nonresidential starts month-to-month strikes a sweet chord. With winter being left behind, April is the time of year when onsite building activity normally perks up nicely. Some of that usual springier step was apparent even in the current extraordinary circumstances.

Other time comparisons, however, provide less comfort. April 2020's nonresidential starts level was -30.7% versus April 2019. April 2020 relative to the five-year average for April from 2015 to 2019 inclusive was -22.3%. And year-to-date nonresidential starts in the latest month were -16.7% when held up against January-April 2019. (Year to date in March, they had been -13.3%.)

### Repercussions from Shutting Down the Economy

In April, the severe repercussions from shutting down the economy became glaringly apparent in the nation's labor market statistics. A never-before-seen slide in jobs of 20.5 million made previous charts on month-to-month change worthless. Graph 1 shows an old graph inside a new one, where the vertical scale has needed a many-fold expansion.

In a single month, the seasonally adjusted unemployment rate deteriorated from a quite healthy 4.4% to a deeply distressed 14.7%. It would have been 18.0%, if the participation rate hadn't retreated, month to month, from 62.7% to 60.2%. Close to 7 million individuals stopped looking for work in April, since they had no expectation of success, and were removed from the labor market roster.

The slide in U.S. construction employment in April was one million jobs. From Graph 2, the decline in total U.S. employment in the latest month took away 95% of the increase that occurred from the depths of the 2008-09 recession through the first quarter of this year. The construction sector, as a subset of total jobs, also recorded a huge decline in April, but to a degree that was a bit less than half the climb subsequent to the Great Recession.

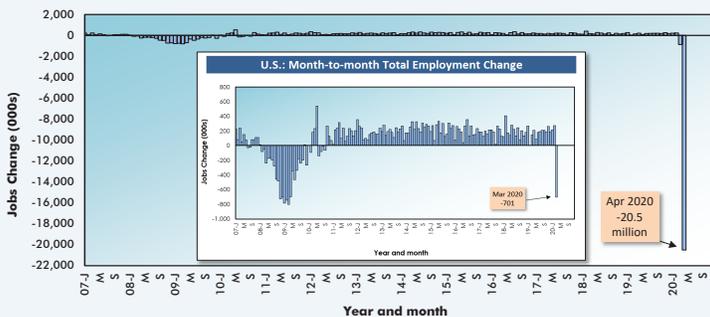
**TABLE 1: VALUE OF UNITED STATES CONSTRUCTION STARTS — APRIL 2020 (ConstructConnect®)**

	Jan-Apr 2020 (\$ billions)	% Change Jan-Apr 20 vs Jan-Apr 19	% Change Apr 20 vs Apr 19	% Change Apr 20 vs Mar 20
Hotel/Motel	5.236	-35.1%	-49.5%	-9.0%
Retail/Shopping	4.193	-30.6%	-19.2%	-1.4%
Parking Garage	0.699	-36.5%	-76.3%	-57.6%
Amusement	2.148	-1.7%	-6.4%	16.8%
Private Office	8.256	-16.7%	-52.2%	69.6%
Government Office	3.422	14.0%	-1.9%	-11.9%
Laboratory	0.833	19.1%	-45.8%	-45.1%
Warehouse	6.076	-15.7%	-54.9%	42.5%
Miscellaneous Commercial*	2.411	-48.2%	-43.9%	-33.1%
<b>COMMERCIAL (big subset)</b>	<b>33.273</b>	<b>-22.4%</b>	<b>-42.5%</b>	<b>7.2%</b>
<b>INDUSTRIAL (Manufacturing)</b>	<b>2.741</b>	<b>-79.6%</b>	<b>-92.5%</b>	<b>-39.9%</b>
Religious	0.606	-1.2%	-16.7%	-52.8%
Hospital/Clinic	3.415	-26.5%	-51.5%	-21.5%
Nursing/Assisted Living	2.034	-46.8%	-35.3%	58.5%
Library/Museum	1.934	91.4%	-11.8%	50.3%
Fire/Police/Courthouse/Prison	2.502	34.6%	-0.3%	-14.7%
Military	3.673	231.7%	777.6%	174.6%
School/College	21.234	-11.9%	-25.7%	-8.7%
Miscellaneous Medical	1.940	-32.6%	-55.6%	-33.9%
<b>INSTITUTIONAL</b>	<b>37.338</b>	<b>-6.8%</b>	<b>-13.6%</b>	<b>4.4%</b>
Miscellaneous Non-residential	1.837	-18.5%	-38.0%	-8.2%
<b>NONRESIDENTIAL BUILDING</b>	<b>75.188</b>	<b>-23.7%</b>	<b>-33.3%</b>	<b>4.5%</b>
Airport	1.165	-43.4%	-44.4%	-40.3%
Road/Highway	20.504	4.1%	7.6%	42.2%
Bridge	8.885	-31.5%	-73.8%	-42.4%
Dam/Marine	2.761	104.5%	126.1%	19.4%
Water/Sewage	10.331	1.3%	-11.0%	-7.8%
Miscellaneous Civil (power, pipelines, etc.)	6.301	17.7%	-49.9%	-45.5%
<b>HEAVY ENGINEERING (Civil)</b>	<b>49.947</b>	<b>-3.2%</b>	<b>-27.1%</b>	<b>-0.4%</b>
<b>TOTAL NONRESIDENTIAL</b>	<b>125.135</b>	<b>-16.7%</b>	<b>-30.7%</b>	<b>2.3%</b>

\* Includes transportation terminals and sports arenas.

Source: ConstructConnect Research Group/Table: ConstructConnect.

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

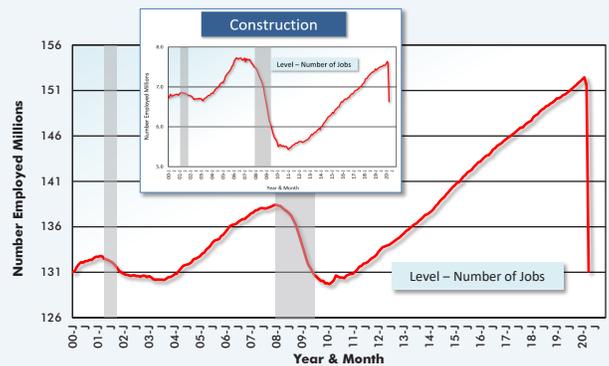


The smaller interior graph is the one-month-before version of the larger outside graph. The U.S. unemployment rate has soared from 4.4% to 14.7%.

Latest data point is for April, 2020.

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

**GRAPH 2: U.S. TOTAL EMPLOYMENT**



In the single month of April, 'total' jobs lost almost all their gains since 2008-09 (-20.5 million). Construction's decline was -924,000. 'Leisure & hospitality' took the biggest hit, -7.7 million.

Gray shadings denote recessions, Q2-Q3 2001 ('dot.com' collapse) & Q1 2008-Q2 2009 ('Great' Recession). Latest data points are for April, 2020 / Based on seasonally adjusted (SA) data.

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

Continued from page 2

## Construction's Unemployment Rate at 16.6%

Construction's not seasonally adjusted (NSA) unemployment rate in April shot up to 16.6% from 6.9% in March and a tight-for-the-sector 4.7% in April 2019. Construction activity has been judged 'essential' in almost all states since the onset of the health crisis two months ago. Instances of site-work shutdowns have proven relatively temporary. Also, construction appears prominently among lists of industries considered okay for Phase 1 economy re-openings.

Graph 3 highlights where layoff pain has been most wretched in the early days of the pandemic. Employment in the 'leisure and hospitality' sector (hotels/motels, restaurants and bars) plummeted -47.2% year over year in April. No other sector has come even close to that kind of jobs contraction. Young adults, especially, in hospitality and accommodation services have felt the lash of forced closures to halt COVID-19's rampant advance. Construction's jobs shrinkage of -11.2% y/y has been better than the 'total jobs' decline of -12.9%. Worth noting, also, is that construction has done comparatively better than the private services-providing portion of the overall economy (-15.3% y/y).

## Ytd Type-of-Structure Increases Tied to Large Projects

April 2020's month-to-month increase of +2.3% in total nonresidential starts received support from both commercial and institutional work, +7.2% and +4.4% respectively. The commercial sub-categories with particular lift were 'private office buildings', +69.6%, and warehouses, +42.5%. Among the Top 10 projects for the month appearing on page 5 are a Salesforce office tower in Chicago and two enormous (by square footage) distribution centers, one in Texas (for Amazon) and the other in New York (Project Eagle).

On an April 2020 over April 2019 basis, with total nonresidential starts at -30.7%, industrial was down the most (-92.5%), but none of the other major type-of-structure sub-categories had any reason to boast either. Commercial was -42.5%; heavy engineering/civil, -27.1%; and institutional, -13.6%.

As for total nonresidential starts being -16.7% year to date in the latest month, engineering was nearly level, -3.2%, and institutional was off, but not by that much, -6.8%. Commercial, though, was -22.4%, and industrial, -79.6%.

There have been several type-of-structure sub-categories that have managed to achieve year-to-date increases in starts. Reading from top to bottom in Table 1, those with significant dollar volumes include: 'government office buildings', +14.0%; 'fire/police/courthouse/prisons', +34.6%; 'military', +231.7% (Geospatial Intelligence Agency Headquarters; see page 5); 'road/highway', +4.1%; 'dam/marine', +104.5%; and 'miscellaneous civil', +17.7%.

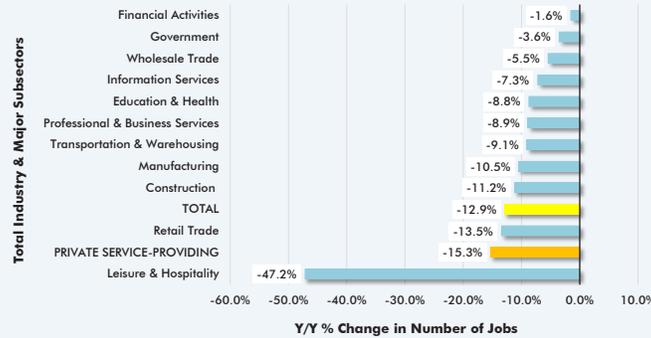
## A Deep Dive Starts Forecast in 2020; Better Prospects in 2021

From 2007 through 2009, during the last recession, ConstructConnect's grand total starts, in dollar volume, experienced a combined decline of slightly more than -30%. For 2020 versus 2019, the company's current forecast is for total starts to be -27.4%, with a good-sized uptick in 2021 versus 2020, +20.8%.

The problems for construction this year will come from many sources: widespread job and income losses throughout the economy that will cut into retail spending and office occupancy; manufacturing shutdowns and capacity utilization rate reductions that will eliminate the need for square footage additions; demand and pricing setbacks for commodities that assure fewer mega project initiations; and government revenue shortfalls that will put a question mark beside infrastructure build-out plans.

Governments are running up enormous debt at the same time as inflow taps are being tightened on income, corporate, property and sales taxes. Plus, there are other sources of government revenue now being strained. For example, it's hard to ring up decent fuel tax receipts when so many cars, trucks and buses are

**GRAPH 3: Y/Y JOBS CHANGE, U.S. TOTAL INDUSTRY & MAJOR SUBSECTORS – APRIL 2020 (BASED ON SEASONALLY ADJUSTED PAYROLL DATA)**



Within the hardest-hit sector, 'leisure & hospitality' (-47.2% y/y), 'accommodation' was -41.6%, 'food services & drinking places', -46.9%, and 'amusements gambling', -58.7%.

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

staying parked in warehouses, garages and driveways.

## Moving Average Graphs Heavily Influenced by Pre-COVID Euphoria

Page 6 showcases six graphs featuring 12-month moving averages for a dozen type-of-structure categories. The lines in all the graphs, except for 'roads/highways' and 'water/sewage', are either continuing to trend along downward pathways or have recently turned in that direction.

Caution must be exercised in interpreting the graphs. Economic circumstances have changed overnight. April results comprise only one-twelfth of the latest moving average calculations. The graphs on page six will be heavily influenced by pre-COVID-crisis conditions for some time.

## Incentive, Bonus and Danger Pay

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

In April, from BLS Table B-3 (including supervisory personnel), 'all-jobs' y/y earnings more than doubled versus March, reaching +7.9% hourly and +7.3% weekly. The surge was facilitated by the disappearance of many lower-paying jobs. Plus, many workers who remained in key positions providing essential services received incentive, bonus and danger pay supplements. Construction workers (from Table B-3) received +2.4% hourly, but -1.2% weekly.

From Table B-8 (leaving out bosses), the 'all jobs' y/y pay increases were +7.7% hourly and +7.0% weekly. Construction workers saw none of that. They were compensated +1.0% hourly and -3.0% weekly.

## Construction Costing — 3 PPI Series in Decline

April 2020's y/y results for three BLS Producer Price Index (PPI) series were as follows: 'construction materials special index', -1.1% (more negative than March's -0.8%); 'inputs to new construction index, excluding capital investment, labor and imports', -4.0% (a minus after March's 0.0%); and 'final demand construction', +2.8% (retreating from the previous month's +3.7%).

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 RSMMeans' 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 -14.6% Ytd

From Table 5 on page 8 of this report, ConstructConnect's total residential starts in April were -22.3% m/m, -35.8% y/y and -11.1% ytd. The latest month's multi-unit starts were -31.6% m/m, -52.3% y/y and -30.5% ytd. Single-family starts were -19.0% m/m and -28.4% y/y, but only -1.6% ytd. Combining residential and nonresidential, 'Grand Total' construction starts in April 2020 were -7.7% m/m, -32.5% y/y and -14.6% 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.

**TABLE 2: VALUE OF UNITED STATES CONSTRUCTION STARTS —  
ConstructConnect® INSIGHT VERSION — APRIL 2020  
ARRANGED TO MATCH THE ALPHABETICAL CATEGORY DROP-DOWN MENUS IN INSIGHT**

	Jan-Apr 2020 (\$ billions)	% Change Jan-Apr 20 vs Jan-Apr 19	% Change Apr 20 vs Apr 19	% Change Apr 20 vs Mar 20
<b>Summary</b>				
CIVIL	49.947	-3.2%	-27.1%	-0.4%
NONRESIDENTIAL BUILDING	75.188	-23.7%	-33.3%	4.5%
RESIDENTIAL	82.256	-11.1%	-35.8%	-22.3%
<b>GRAND TOTAL</b>	<b>207.391</b>	<b>-14.6%</b>	<b>-32.5%</b>	<b>-7.7%</b>
<b>Verticals</b>				
Airport	1.165	-43.4%	-44.4%	-40.3%
All Other Civil	5.321	27.0%	-46.4%	-21.8%
Bridges	8.885	-31.5%	-73.8%	-42.4%
Dams / Canals / Marine Work	2.761	104.5%	126.1%	19.4%
Power Infrastructure	0.980	-15.8%	-67.5%	-84.3%
Roads	20.504	4.1%	7.6%	42.2%
Water and Sewage Treatment	10.331	1.3%	-11.0%	-7.8%
<b>CIVIL</b>	<b>49.947</b>	<b>-3.2%</b>	<b>-27.1%</b>	<b>-0.4%</b>
Offices (private)	8.256	-16.7%	-52.2%	69.6%
Parking Garages	0.699	-36.5%	-76.3%	-57.6%
Transportation Terminals	0.730	-60.3%	-62.1%	-33.2%
<b>Commercial (small subset)</b>	<b>9.685</b>	<b>-24.6%</b>	<b>-55.1%</b>	<b>35.8%</b>
Amusement	2.148	-1.7%	-6.4%	16.8%
Libraries / Museums	1.934	91.4%	-11.8%	50.3%
Religious	0.606	-1.2%	-16.7%	-52.8%
Sports Arenas / Convention Centers	1.681	-40.3%	-27.2%	-33.1%
<b>Community</b>	<b>6.369</b>	<b>-3.9%</b>	<b>-14.3%</b>	<b>-7.6%</b>
College / University	5.354	-22.4%	-45.2%	-40.3%
Elementary / Pre School	6.173	-8.2%	-27.3%	-14.6%
Jr / Sr High School	9.304	-5.0%	-12.4%	14.9%
Special / Vocational	0.403	-42.0%	-57.1%	13.7%
<b>Educational</b>	<b>21.234</b>	<b>-11.9%</b>	<b>-25.7%</b>	<b>-8.7%</b>
Courthouses	0.756	106.4%	-57.0%	-59.3%
Fire and Police Stations	1.088	21.2%	-26.7%	-12.2%
Government Offices	3.422	14.0%	-1.9%	-11.9%
Prisons	0.658	10.5%	171.6%	14.3%
<b>Government</b>	<b>5.924</b>	<b>21.9%</b>	<b>-1.3%</b>	<b>-13.0%</b>
Industrial Labs / Labs / School Labs	0.833	19.1%	-45.8%	-45.1%
Manufacturing	2.741	-79.6%	-92.5%	-39.9%
Warehouses	6.076	-15.7%	-54.9%	42.5%
<b>Industrial</b>	<b>9.649</b>	<b>-54.7%</b>	<b>-69.0%</b>	<b>15.9%</b>
Hospitals / Clinics	3.415	-26.5%	-51.5%	-21.5%
Medical Misc.	1.940	-32.6%	-55.6%	-33.9%
Nursing Homes	2.034	-46.8%	-35.3%	58.5%
<b>Medical</b>	<b>7.389</b>	<b>-34.9%</b>	<b>-47.7%</b>	<b>-8.0%</b>
<b>Military</b>	<b>3.673</b>	<b>231.7%</b>	<b>777.6%</b>	<b>174.6%</b>
Hotels	5.236	-35.1%	-49.5%	-9.0%
Retail Misc.	1.837	-18.5%	-38.0%	-8.2%
Shopping	4.193	-30.6%	-19.2%	-1.4%
<b>Retail</b>	<b>11.265</b>	<b>-31.2%</b>	<b>-36.5%</b>	<b>-5.5%</b>
<b>NONRESIDENTIAL BUILDING</b>	<b>75.188</b>	<b>-23.7%</b>	<b>-33.3%</b>	<b>4.5%</b>
Multi-Family	21.154	-30.5%	-52.3%	-31.6%
Single-Family	61.102	-1.6%	-28.4%	-19.0%
<b>RESIDENTIAL</b>	<b>82.256</b>	<b>-11.1%</b>	<b>-35.8%</b>	<b>-22.3%</b>
<b>NONRESIDENTIAL</b>	<b>125.135</b>	<b>-16.7%</b>	<b>-30.7%</b>	<b>2.3%</b>
<b>GRAND TOTAL</b>	<b>207.391</b>	<b>-14.6%</b>	<b>-32.5%</b>	<b>-7.7%</b>

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 2 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.

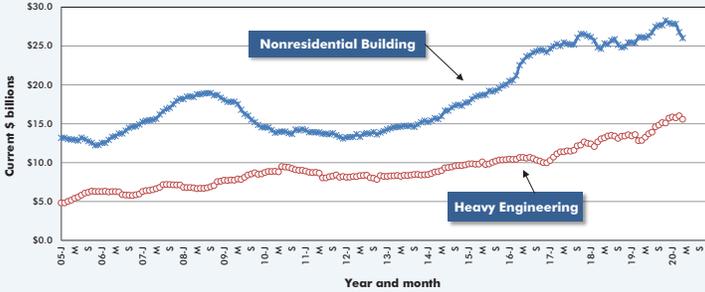
**TABLE 3: ConstructConnect's TOP 10 PROJECT STARTS IN APRIL 2020**

LOCATION (EAST TO WEST)	TYPE OF CONSTRUCTION	DESCRIPTION	SQUARE FEET 000S*	DOLLARS 000,000S
<b>Massachusetts</b> Arlington	Institutional	Arlington High School - Town of Arlington (3 structures; 5 stories) 869 Massachusetts Ave Town of Arlington	415	\$291
<b>New York</b> Bayberry	Industrial	Project Eagle Distribution Facility / Clay (1 structure; 5 stories) Morgan Rd Trammell Crow - Northeast Metro	3,783	\$350
<b>South Carolina</b> Anderson	Industrial	Enterprise Logistics Park Phase I (2 structures) Hwy 86 and Blackman Rd VanTrust Real Estate, LLC	289	\$155
<b>West Virginia</b> Hinton	Civil/Engineering	Bluestone Dam Safety Assurance Project, Phase 5 (1 structure) 701 Miller Ave US Army Corps of Engineers - Huntington District	*	\$320
Winfield	Civil/Engineering	Upgrade to 4 Lane Road - US 35/i-64 I/C - Nitro I/C - US35 I64 to St. Albans IC (2 structures) US-35 West Virginia Department of Transportation (WVDOT)	*	\$224
<b>Illinois</b> Chicago	Commercial	Salesforce Tower Chicago (Wolf Point South Tower) (1 structure; 60 stories) 333 W Wolf Point Plaza Hines Midwest Regional Office	1,510	\$800
<b>Missouri</b> Saint Louis	Institutional	Next NGA West (New Western Headquarters/National Geospatial- Intelligence Agency (1 structure) Jefferson Ave & Cass Ave U.S. Army Corps of Engineers - Kansas City District	1,854	\$1,750
Creve Coeur	Civil/Engineering	MoDOT I-270 North Design-Build project (2 structures) I-270 Missouri Department of Transportation (MoDOT) - St. Louis District	*	\$246
<b>Texas</b> Pflugerville	Industrial	Amazon Fulfillment Center - Project Charm / Pflugerville (1 structure; 4 stories) 2000 E Pecan St Seefried Industrial Properties	3,800	\$410
Wharton	Civil/Engineering	US 59 - Upgrade to Rural Freeway (2 structures) US-59 Texas Department of Transportation / Austin	*	\$169
<b>TOTALS:</b>			<b>11,651</b>	<b>\$4,715</b>

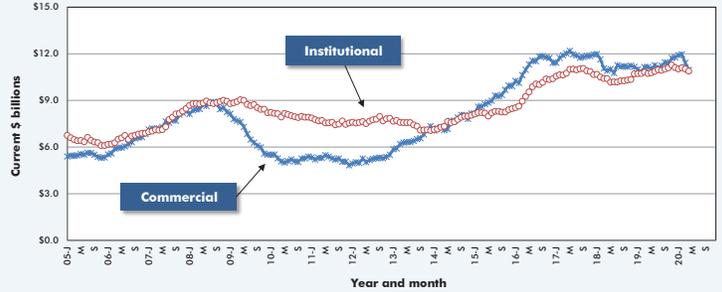
\*A square footage measure does not apply for alteration, some forms of industrial (e.g., petrochemical) and most engineering/civil work.

Source: ConstructConnect/Table: ConstructConnect.

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



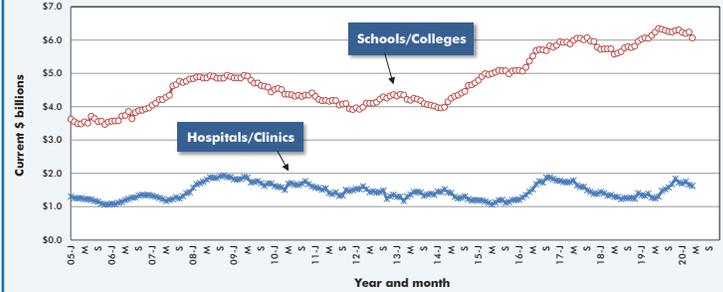
**GRAPH 5: U.S. COMMERCIAL AND INSTITUTIONAL CONSTRUCTION STARTS — ConstructConnect® (12-MONTH MOVING AVERAGES)**



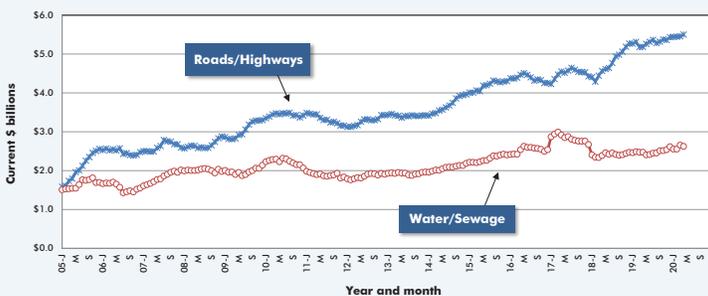
**GRAPH 6: U.S. RETAIL AND PRIVATE OFFICE BUILDING CONSTRUCTION STARTS — ConstructConnect® (12-MONTH MOVING AVERAGES)**



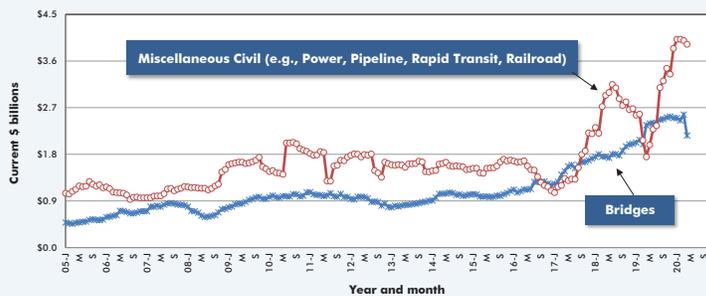
**GRAPH 7: U.S. HOSPITAL/CLINIC AND SCHOOL/COLLEGE CONSTRUCTION STARTS — ConstructConnect® (12-MONTH MOVING AVERAGES)**



**GRAPH 8: U.S. ROAD/HIGHWAY AND WATER/SEWAGE CONSTRUCTION STARTS — ConstructConnect® (12-MONTH MOVING AVERAGES)**



**GRAPH 9: 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 April, 2020.

Source: ConstructConnect/Charts: ConstructConnect.

**TABLE 4: U.S. YEAR-TO-DATE REGIONAL STARTS  
NONRESIDENTIAL CONSTRUCTION\* — ConstructConnect®**

	Jan-Apr 2019	Jan-Apr 2020	% Change
Connecticut	\$2,187,577,639	\$1,074,907,383	-50.9%
Maine	\$540,297,468	\$518,170,920	-4.1%
Massachusetts	\$3,483,454,647	\$2,629,980,512	-24.5%
New Hampshire	\$584,932,158	\$227,236,762	-61.2%
Rhode Island	\$363,605,880	\$257,317,552	-29.2%
Vermont	\$123,909,194	\$237,723,394	91.9%
<b>Total New England</b>	<b>\$7,283,776,986</b>	<b>\$4,945,336,523</b>	<b>-32.1%</b>
New Jersey	\$2,092,229,794	\$2,430,877,140	16.2%
New York	\$7,483,002,971	\$6,973,653,900	-6.8%
Pennsylvania	\$5,015,692,695	\$3,644,752,637	-27.3%
<b>Total Middle Atlantic</b>	<b>\$14,590,925,460</b>	<b>\$13,049,283,677</b>	<b>-10.6%</b>
<b>TOTAL NORTHEAST</b>	<b>\$21,874,702,446</b>	<b>\$17,994,620,200</b>	<b>-17.7%</b>
Illinois	\$3,818,102,954	\$4,659,517,055	22.0%
Indiana	\$2,373,162,019	\$2,674,814,508	12.7%
Michigan	\$2,657,920,459	\$2,314,421,216	-12.9%
Ohio	\$4,147,664,031	\$3,031,428,993	-26.9%
Wisconsin	\$3,390,580,834	\$2,747,125,337	-19.0%
<b>Total East North Central</b>	<b>\$16,387,430,297</b>	<b>\$15,427,307,109</b>	<b>-5.9%</b>
Iowa	\$1,654,016,635	\$1,937,567,272	17.1%
Kansas	\$1,622,027,355	\$987,585,224	-39.1%
Minnesota	\$2,168,428,057	\$2,239,790,350	3.3%
Missouri	\$2,287,199,440	\$5,052,581,059	120.9%
Nebraska	\$1,525,628,835	\$1,813,024,013	18.8%
North Dakota	\$376,887,208	\$470,074,662	24.7%
South Dakota	\$583,323,410	\$504,137,398	-13.6%
<b>Total West North Central</b>	<b>\$10,217,510,940</b>	<b>\$13,004,759,978</b>	<b>27.3%</b>
<b>TOTAL MIDWEST</b>	<b>\$26,604,941,237</b>	<b>\$28,432,067,087</b>	<b>6.9%</b>
Delaware	\$471,326,917	\$402,256,199	-14.7%
District of Columbia	\$603,435,109	\$217,147,319	-64.0%
Florida	\$9,521,586,370	\$7,348,783,822	-22.8%
Georgia	\$6,125,161,208	\$3,857,531,409	-37.0%
Maryland	\$3,044,004,951	\$2,687,817,591	-11.7%
North Carolina	\$4,547,553,917	\$3,228,634,648	-29.0%
South Carolina	\$2,750,892,808	\$1,804,949,164	-34.4%
Virginia	\$7,043,141,231	\$3,850,302,725	-45.3%
West Virginia	\$690,669,574	\$1,020,801,875	47.8%
<b>Total South Atlantic</b>	<b>\$34,797,772,085</b>	<b>\$24,418,224,752</b>	<b>-29.8%</b>
Alabama	\$5,014,626,785	\$1,686,812,266	-66.4%
Kentucky	\$2,818,319,868	\$928,827,558	-67.0%
Mississippi	\$1,004,753,594	\$1,119,099,409	11.4%
Tennessee	\$2,779,546,930	\$2,806,290,814	1.0%
<b>Total East South Central</b>	<b>\$11,617,247,177</b>	<b>\$6,541,030,047</b>	<b>-43.7%</b>
Arkansas	\$997,403,355	\$1,542,426,597	54.6%
Louisiana	\$1,551,064,219	\$1,532,238,359	-1.2%
Oklahoma	\$2,153,705,612	\$1,350,143,712	-37.3%
Texas	\$19,683,986,699	\$13,298,339,658	-32.4%
<b>Total West South Central</b>	<b>\$24,386,159,885</b>	<b>\$17,723,148,326</b>	<b>-27.3%</b>
<b>TOTAL SOUTH</b>	<b>\$70,801,179,147</b>	<b>\$48,682,403,125</b>	<b>-31.2%</b>
Arizona	\$2,579,524,609	\$3,689,469,183	43.0%
Colorado	\$3,823,516,343	\$2,569,928,415	-32.8%
Idaho	\$750,066,391	\$524,549,913	-30.1%
Montana	\$362,765,854	\$469,635,470	29.5%
Nevada	\$2,451,195,798	\$1,251,488,779	-48.9%
New Mexico	\$451,776,317	\$476,339,517	5.4%
Utah	\$1,885,421,459	\$2,875,321,892	52.5%
Wyoming	\$245,125,060	\$332,352,554	35.6%
<b>Total Mountain</b>	<b>\$12,549,391,831</b>	<b>\$12,189,085,723</b>	<b>-2.9%</b>
Alaska	\$294,590,622	\$287,951,090	-2.3%
California	\$12,951,264,365	\$12,717,483,749	-1.8%
Hawaii	\$869,615,405	\$304,933,989	-64.9%
Oregon	\$1,478,547,889	\$1,140,255,947	-22.9%
Washington	\$2,774,920,410	\$3,386,342,466	22.0%
<b>Total Pacific</b>	<b>\$18,368,938,691</b>	<b>\$17,836,967,241</b>	<b>-2.9%</b>
<b>TOTAL WEST</b>	<b>\$30,918,330,522</b>	<b>\$30,026,052,964</b>	<b>-2.9%</b>
<b>TOTAL U.S.</b>	<b>\$150,199,153,352</b>	<b>\$125,135,143,376</b>	<b>-16.7%</b>

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

Source: ConstructConnect/Table: ConstructConnect.

**TABLE 5: VALUE OF U.S. NATIONAL CONSTRUCTION STARTS — APRIL 2020 — ConstructConnect®**  
**BILLIONS OF CURRENT \$\$, NOT SEASONALLY ADJUSTED (NSA)**

	Latest month actuals			Moving averages (placed in end month)					Year to Date		
	Feb 20	Mar 20	Apr 20	Feb 20	3-months Mar 20	Apr 20	Feb 20	12-months Mar 20	Apr 20	Jan-Apr 2019	Jan-Apr 2020
Single Family	16.643	16.057	13.008	15.934	16.031	15.236	16.918	16.916	16.485	62.104	61.102
month-over-month % change	8.1%	-3.5%	-19.0%	3.0%	0.6%	-5.0%	2.0%	0.0%	-2.5%	-7.3%	-1.6%
year-over-year % change	30.7%	-0.2%	-28.6%	18.9%	9.5%	-2.7%	1.2%	1.9%	0.1%		
Apartment	5.176	5.648	3.844	6.550	5.763	4.894	7.862	7.690	7.338	30.416	21.154
month-over-month % change	-20.0%	9.1%	-31.6%	-15.8%	-12.0%	-15.1%	-2.6%	-2.2%	-4.6%		
year-over-year % change	-32.8%	-26.7%	-52.3%	-13.6%	-22.5%	-37.5%	-0.4%	-3.3%	-7.8%	4.4%	-30.5%
<b>TOTAL RESIDENTIAL</b>	<b>21.819</b>	<b>21.705</b>	<b>16.872</b>	<b>22.484</b>	<b>21.795</b>	<b>20.132</b>	<b>24.779</b>	<b>24.606</b>	<b>23.823</b>	<b>92.520</b>	<b>82.256</b>
month-over-month % change	-0.2%	-0.5%	-22.3%	-3.3%	-3.1%	-7.6%	0.5%	-0.7%	-3.2%		
year-over-year % change	6.8%	-8.7%	-35.8%	7.1%	-1.3%	-14.3%	0.7%	0.2%	-2.4%	-3.7%	-11.1%
Hotel/Motel	1.733	1.070	0.973	1.695	1.421	1.259	1.889	1.743	1.664	8.073	5.236
month-over-month % change	18.8%	-38.3%	-9.0%	-17.2%	-16.2%	-11.4%	-0.1%	-7.7%	-4.6%		
year-over-year % change	-1.0%	-62.1%	-49.5%	0.3%	-30.6%	-41.9%	-12.4%	-22.7%	-25.9%	9.2%	-35.1%
Retail/Shopping	0.734	1.250	1.233	0.884	0.987	1.072	1.244	1.233	1.209	6.040	4.193
month-over-month % change	-24.8%	70.2%	-1.4%	-14.0%	11.6%	8.7%	-6.7%	-0.9%	-2.0%		
year-over-year % change	-59.3%	-9.3%	-19.2%	-37.3%	-37.3%	-34.4%	-19.2%	-17.6%	-17.4%	-11.0%	-30.6%
Parking Garages	0.098	0.177	0.075	0.189	0.208	0.117	0.263	0.247	0.227	1.101	0.699
month-over-month % change	-72.0%	80.4%	-57.6%	-24.3%	10.1%	-44.0%	-0.3%	-5.9%	-8.1%		
year-over-year % change	-7.8%	-51.2%	-76.3%	-25.3%	-20.5%	-55.4%	6.8%	-6.0%	-14.6%	41.8%	-36.5%
Amusement	0.417	0.487	0.569	0.555	0.526	0.491	0.631	0.623	0.620	2.186	2.148
month-over-month % change	-38.2%	16.9%	16.8%	-1.2%	-5.1%	-6.7%	0.1%	-1.4%	-0.5%		
year-over-year % change	2.1%	-17.6%	-6.4%	3.0%	0.1%	-8.4%	-7.2%	-8.4%	-8.3%	-17.0%	-1.7%
Office	3.099	0.914	1.550	2.514	2.235	1.854	3.269	2.970	2.828	9.912	8.256
month-over-month % change	15.0%	-70.5%	69.6%	-20.3%	-11.1%	-17.1%	5.6%	-9.2%	-4.8%		
year-over-year % change	23.8%	-79.7%	-52.2%	-54.4%	-6.6%	-26.7%	55.5%	27.5%	18.5%	-11.1%	-16.7%
Governmental Offices	0.738	1.052	0.926	0.729	0.832	0.908	0.967	0.998	0.994	3.001	3.422
month-over-month % change	4.6%	42.5%	-11.9%	-14.2%	14.1%	8.9%	0.7%	3.2%	0.1%		
year-over-year % change	12.3%	53.6%	-1.9%	7.8%	21.3%	18.8%	5.7%	7.4%	7.3%	4.2%	14.0%
Laboratories	0.098	0.192	0.105	0.280	0.243	0.132	0.218	0.215	0.207	0.700	0.833
month-over-month % change	-77.6%	95.1%	-45.1%	-7.8%	-13.4%	-45.7%	1.1%	-1.6%	-3.5%		
year-over-year % change	38.3%	-17.6%	-45.8%	61.9%	44.0%	-20.6%	-15.7%	-14.0%	-14.9%	1.9%	19.1%
Warehouse	0.961	0.964	1.373	1.944	1.567	1.099	1.890	1.852	1.713	7.204	6.076
month-over-month % change	-65.4%	0.4%	42.5%	-9.7%	-19.4%	-29.9%	-1.6%	-2.0%	-7.5%		
year-over-year % change	-27.8%	-31.7%	-54.9%	62.8%	13.1%	-43.0%	5.3%	4.0%	-10.0%	17.8%	-15.7%
Misc Commercial	0.576	0.647	0.433	0.733	0.659	0.552	1.597	1.534	1.506	4.656	2.411
month-over-month % change	-23.8%	12.4%	-33.1%	-29.7%	-10.1%	-16.3%	-0.2%	-3.9%	-1.8%		
year-over-year % change	-6.6%	-53.7%	-43.9%	-27.3%	-49.1%	-40.5%	42.0%	32.2%	44.7%	4.6%	-48.3%
<b>TOTAL COMMERCIAL</b>	<b>8.454</b>	<b>6.753</b>	<b>7.238</b>	<b>9.523</b>	<b>8.678</b>	<b>7.481</b>	<b>11.968</b>	<b>11.415</b>	<b>10.970</b>	<b>42.872</b>	<b>33.273</b>
month-over-month % change	-21.9%	-20.1%	7.2%	-16.4%	-8.9%	-13.8%	0.5%	-4.6%	-3.9%		
year-over-year % change	8.8%	-49.6%	-42.5%	11.1%	-14.1%	-33.5%	10.6%	2.4%	-1.6%	0.0%	-22.4%
<b>TOTAL INDUSTRIAL (Manufacturing)</b>	<b>1.369</b>	<b>0.249</b>	<b>0.150</b>	<b>1.197</b>	<b>0.864</b>	<b>0.589</b>	<b>4.151</b>	<b>3.719</b>	<b>3.565</b>	<b>13.407</b>	<b>2.741</b>
month-over-month % change	40.9%	-81.8%	-39.9%	-10.4%	-27.9%	-31.7%	-2.8%	-10.4%	-4.2%		
year-over-year % change	-51.2%	-95.4%	-92.5%	-62.3%	-77.3%	-82.7%	27.8%	3.5%	-2.1%	143.3%	-79.6%
Religious	0.094	0.259	0.122	0.118	0.161	0.158	0.151	0.160	0.158	0.613	0.606
month-over-month % change	-27.8%	174.2%	-52.8%	-25.6%	36.2%	-1.8%	-0.5%	5.5%	-1.3%		
year-over-year % change	-9.2%	62.7%	-16.7%	-34.3%	6.6%	16.0%	-20.2%	-14.6%	-13.1%	-2.4%	-1.2%
Hospitals/Clinics	1.386	0.505	0.394	1.300	1.006	0.763	1.748	1.658	1.623	4.649	3.415
month-over-month % change	22.9%	-63.6%	-21.5%	-23.1%	-22.6%	-24.2%	3.3%	-5.1%	-2.1%		
year-over-year % change	91.9%	-68.1%	-51.5%	-21.2%	-21.2%	-26.8%	31.7%	19.4%	27.7%	-26.0%	-26.5%
Nursing/Assisted Living	0.419	0.350	0.555	0.516	0.493	0.441	0.738	0.680	0.655	3.824	2.034
month-over-month % change	-41.0%	-16.5%	58.5%	-20.9%	-4.5%	-10.5%	-4.2%	-7.8%	-3.7%		
year-over-year % change	-48.1%	-66.4%	-35.3%	-46.8%	-50.1%	-51.1%	-16.2%	-24.8%	-26.8%	3.2%	-46.8%
Libraries/Museums	0.744	0.188	0.283	0.547	0.550	0.405	0.419	0.404	0.401	1.010	1.934
month-over-month % change	3.4%	-74.7%	50.3%	34.9%	0.7%	-26.4%	14.6%	-3.6%	-0.8%		
year-over-year % change	625.9%	-48.8%	-11.8%	237.2%	139.5%	53.6%	83.2%	63.9%	55.4%	52.0%	91.4%
Fire/Police/Courthouse/Prison	0.416	0.635	0.542	0.613	0.654	0.531	0.623	0.635	0.635	1.860	2.502
month-over-month % change	-54.3%	52.7%	-14.7%	-8.5%	6.7%	-18.8%	1.5%	2.0%	0.0%		
year-over-year % change	34.8%	30.5%	-44.4%	-48.7%	-43.0%	-49.8%	-8.1%	-7.8%	-19.3%	-8.9%	-34.6%
Military	0.304	0.728	2.000	0.425	0.558	1.011	0.481	0.506	0.654	1.107	3.673
month-over-month % change	-52.5%	139.2%	174.6%	-26.6%	31.3%	81.2%	2.3%	5.2%	29.2%		
year-over-year % change	77.1%	69.2%	777.6%	46.2%	90.3%	265.3%	11.5%	14.1%	46.0%	14.7%	231.7%
Schools/Colleges	3.994	6.637	6.062	4.551	5.057	5.565	6.199	6.240	6.065	24.108	21.234
month-over-month % change	-12.0%	66.2%	-8.7%	-5.3%	11.1%	10.0%	-0.5%	0.7%	-2.8%		
year-over-year % change	-8.3%	8.1%	-25.7%	-7.4%	-4.9%	-10.5%	2.2%	3.1%	-1.2%	9.8%	-11.9%
Misc Medical	0.403	0.635	0.420	0.564	0.507	0.486	0.739	0.741	0.697	2.878	1.940
month-over-month % change	-16.4%	57.7%	-33.9%	-0.3%	-10.1%	-4.1%	1.4%	0.2%	-5.9%		
year-over-year % change	43.1%	6.3%	-55.6%	-16.4%	-21.4%	-20.8%	-20.2%	-18.9%	-20.9%	-18.8%	-32.6%
<b>TOTAL INSTITUTIONAL</b>	<b>7.761</b>	<b>9.938</b>	<b>10.379</b>	<b>8.633</b>	<b>8.986</b>	<b>9.360</b>	<b>11.098</b>	<b>11.024</b>	<b>10.888</b>	<b>40.050</b>	<b>37.338</b>
month-over-month % change	-16.2%	28.1%	4.4%	-9.4%	-4.1%	4.2%	0.7%	-0.7%	-1.2%		
year-over-year % change	13.2%	-8.2%	-13.6%	-7.7%	-3.8%	-5.5%	3.4%	1.9%	1.4%	0.6%	-6.8%
Misc Non Residential	0.416	0.460	0.422	0.463	0.472	0.433	0.626	0.618	0.596	2.255	1.837
month-over-month % change	-22.9%	10.7%	-8.2%	-24.1%	1.9%	-8.3%	-2.3%	-1.2%	-3.5%		
year-over-year % change	-29.4%	-16.7%	-38.0%	-1.8%	-10.1%	-28.8%	4.7%	4.2%	0.0%	-2.5%	-18.5%
<b>TOTAL NON-RES BUILDING</b>	<b>18.000</b>	<b>17.400</b>	<b>18.190</b>	<b>19.817</b>	<b>19.000</b>	<b>17.863</b>	<b>27.843</b>	<b>26.777</b>	<b>26.019</b>	<b>98.584</b>	<b>75.188</b>
month-over-month % change	-16.7%	-3.3%	4.5%	-13.3%	-4.1%	-6.0%	0.0%	-3.8%	-2.8%		
year-over-year % change	-0.1%	-42.4%	-33.3%	-8.1%	-20.1%	-29.0%	9.6%	2.4%	-0.4%	8.9%	-23.7%
Airports	0.188	0.503	0.300	0.266	0.288	0.330	0.543	0.559	0.539	2.057	1.165
month-over-month % change	8.4%	167.1%	-40.3%	-16.5%	8.2%	14.6%	-7.3%	2.9%	-3.6%		
year-over-year % change	-73.1%	59.4%	-44.4%	-48.7%	-43.0%	-36.3%	-8.7%	1.8%	-2.0%	-24.7%	-43.4%
Roads/Highways	3.691	5.387	7.650	3.929	4.281	5.579	5.445	5.457	5.502	19.691	20.504
month-over-month % change	-2.0%	46.0%	42.2%	-2.1%	9.0%	30.3%	0.1%	0.2%	0.8%		
year-over-year % change	1.6%	2.7%	7.6%	9.4%	2.1%	4.7%	2.5%	5.4%	6.1%	-5.0%	4.1%
Bridges	1.928	3.009	1.734	1.862	2.384	2.223	2.455	2.567	2.161	12.965	8.885
month-over-month % change	-13.0%	56.1%	-42.4%	0.1%	28.0%	-6.7%	-1.8%	4.6%	-15.8%		
year-over-year % change	-22.2%	81.4%	-73.8%	-13.7%	12.5%	-37.9%	18.1%	28.7%	-8.5%	49.8%	-31.5%
Dams/Marine	0.277	0.696	0.830	0.539	0.643	0.601	0.756	0.791	0.830	1.350	2.761
month-over-month % change	-71.1%	151.4%	19.4%	-33.1%	19.4%	-6.6%	-0.6%	4.7%	4.9%		
year-over-year % change	-17.0%	156.5%	126.1%	34.7%	96.5%	85.5%	35.1%	42.4%	54.5%	-12.8%	104.5%
Water/Sewage	2.091	3.241	2.989	2.362	2.447	2.774	2.552	2.656	2.625	10.199	10.331
month-over-month % change	4.1%	55.0%	-7.8%	-4.8%	3.6%	13.3%	-0.1%	4.1%	-1.2%		
year-over-year % change	-0.9%	62.2%	-11.0%	2.4%	7.3%	11.5%	2.6%	7.5%	6.1%	0.4%	1.3%
Misc Civil (Power, etc.)	0.959	1.608	0.877	3.551	1.808	1.148	4.020	3.995	3.922	5.354	6.301
month-over-month % change	-66.5%	67.7%	-45.5%	-9.3%	-49.1%	-36.5%	0.0%	-0.6%	-1.8%		
year-over-year % change	1.0%	-15.9%	-49.9%	31							