

# Construction Industry Snapshot

Issued: July 2020  
(based on June 2020 Starts Stats)

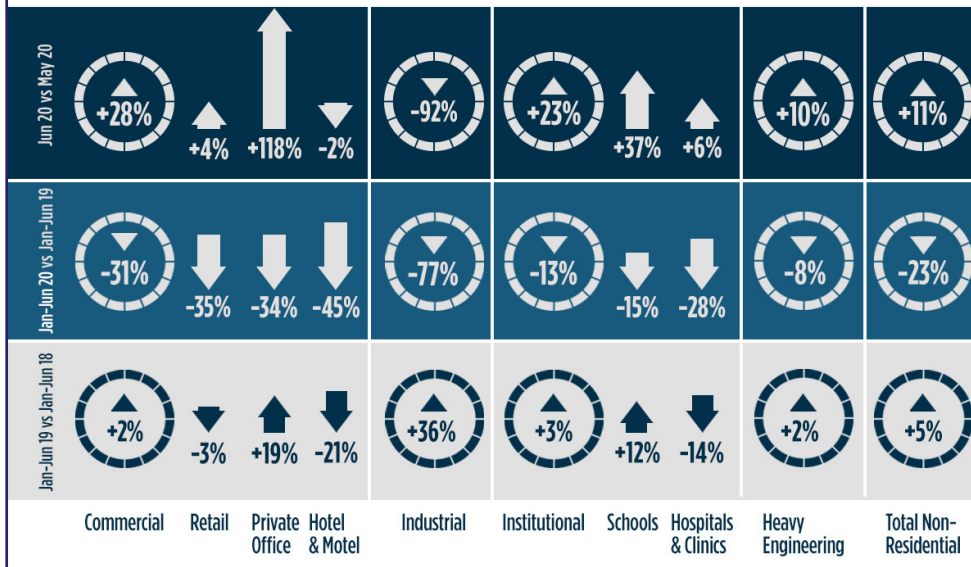


Marketing Analytics Team

## 2020's H1 Nonresidential Construction Starts Down by Nearly a Quarter

ConstructConnect announced today that the latest month's volume of construction starts, excluding residential work, was \$37.6 billion, an increase of 10.5% versus May's figure of \$34.1 billion.

June 2020 versus June 2019, though, was -26.8% and June 2020 year to date has been -22.9%. Due to the onset of the coronavirus health crisis in the spring, the normal seasonality in construction starts has been almost absent.



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## June's Notable Points

- June 2020's month to month (m/m) increase in total nonresidential construction starts of +10.5% was broadly-based, with commercial at +28.3%; institutional, +23.0%; and heavy engineering/civil, +9.9%. Industrial, though, fell on the rocks, -91.7%.
- The -26.8% performance of June 2020 versus June 2019 (y/y) total nonresidential starts resulted from declines in all four major type-of-structure categories. Striking the sourest note was industrial, -81.7%, followed by commercial, -46.5%; institutional, -26.1%; and engineering, -11.6%.

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## 2020's H1 Nonresidential Construction Starts Down by Nearly a Quarter

ConstructConnect announced today that the latest month's volume of construction starts, excluding residential work, was \$37.6 billion (*green shaded box*, Table 6, page 8), an increase of 10.5% versus May's figure of \$34.1 billion (originally reported as \$32.1 billion).

This year's June compared with last year's June, though, was -26.8%. And year-to-date starts through the first half of 2019 have been -22.9% (a drop of nearly a quarter) relative to January-June of 2019.

Due to the onset of the coronavirus health crisis in the spring of this year, the normal seasonality in construction starts has been almost absent. Last year, nonresidential starts in the second quarter were slightly more than 50% higher than in the first quarter. This year, Q2 has seen a nonresidential dollar volume increase of just 11% compared with Q1.

Also, this year to date has not seen the depth of mega project activity (i.e., projects valued at \$1 billion or more each) realized last year. For example, June 2019 starts featured three mega projects (a natural gas pipeline in Texas; a wind power project in Wyoming; and a Microsoft campus expansion in Washington state) that summed to \$7.1 billion. June 2020 starts included a single mega project (a rapid transit project in Seattle — see page 5) for \$1.4 billion.

'Shelter at home' directives meant wide-ranging negative implications for economic and construction activity beginning in late March and extending through mid-June. Recent state and city re-openings, however, do point to better news concerning construction starts from now on provided further COVID-19 incursions don't necessitate extreme retrenching.

Through the first half of 2020, industrial (-77% year to date) and commercial (-31%) starts have fallen into deeper pits than institutional (-13%) and heavy engineering/civil (-8%). Decisions concerning most industrial and commercial groundbreakings are made by the private sector. Much (but by no means all) of institutional and engineering work is determined by the public sector. Government capital spending, geared towards fulfilling social needs, is relatively more stable.

## Construction Manages Second Lowest Y/Y Jobs Loss

According to the Bureau of Labor Statistics (BLS), and as set out in Graph 1, no major U.S. industrial sub-sector has escaped being touched by the pandemic's jobs-reduction wand. Some, though, have skipped away with minimal discomfort. First among these has been 'financial activities', where staffing in June was down by only -1.4% year over year. Stock market indices have been performing admirably, with occasional new record highs being set.

Construction activity, which was judged essential and, therefore, allowed to continue nearly everywhere in April-May, even as most other segments of the economy were closing shop or relocating into private residences, has sustained employment surprisingly well. The percentage-change loss of total jobs in the sector was just -4.4% year over year in June, second lowest among all industries.

## Construction's Unemployment Rate Eases to 10.1%

The not seasonally adjusted (NSA) unemployment rate economy-wide in America in June was 11.1%. (Seasonally adjusted, it was 11.2%.) Construction, at 10.1% NSA in June, beat the 11.1% figure. Construction's worst unemployment rate in these difficult times was 16.6% in April. A year ago, in June 2019, construction's NSA unemployment rate was 4.0%.

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

	Jan-Jun 2020 (\$ billions)	% Change Jan-Jun 20 vs Jan-Jun 19	% Change Jun 20 vs Jun 19	% Change Jun 20 vs May 20
Hotel/Motel	6.450	-44.6%	-73.7%	-2.0%
Retail/Shopping	6.202	-34.6%	-45.1%	4.1%
Parking Garage	0.972	-46.5%	-57.2%	-23.8%
Amusement	3.222	-6.0%	-33.8%	51.3%
Private Office	10.914	-33.9%	-68.7%	117.7%
Government Office	4.939	-0.6%	-19.9%	9.2%
Laboratory	1.114	11.0%	78.0%	114.3%
Warehouse	10.732	-2.7%	-16.2%	14.6%
Miscellaneous Commercial *	3.545	-65.1%	27.3%	53.9%
<b>COMMERCIAL (big subset)</b>	<b>48.091</b>	<b>-31.3%</b>	<b>-46.5%</b>	<b>28.3%</b>
<b>INDUSTRIAL (Manufacturing)</b>	<b>6.121</b>	<b>-77.3%</b>	<b>-81.7%</b>	<b>-91.7%</b>
Religious	0.766	-24.6%	-62.6%	-41.0%
Hospital/Clinic	5.553	-28.0%	-57.2%	6.2%
Nursing/Assisted Living	3.132	-41.8%	-36.7%	-17.6%
Library/Museum	2.414	28.1%	-16.8%	43.6%
Fire/Police/Courthouse/Prison	3.457	13.2%	-25.2%	8.5%
Military	4.730	171.3%	76.4%	29.7%
School/College	37.393	-15.4%	-19.7%	36.7%
Miscellaneous Medical	3.337	-33.3%	-63.2%	-47.8%
<b>INSTITUTIONAL</b>	<b>60.783</b>	<b>-13.1%</b>	<b>-26.1%</b>	<b>23.0%</b>
Miscellaneous Non-residential	2.719	-21.6%	-22.4%	25.7%
<b>NONRESIDENTIAL BUILDING</b>	<b>117.714</b>	<b>-30.9%</b>	<b>-36.3%</b>	<b>11.0%</b>
Airport	2.594	-22.0%	44.0%	57.6%
Road/Highway	34.602	2.6%	7.5%	6.5%
Bridge	13.399	-23.5%	18.4%	45.4%
Dam/Marine	4.151	-8.0%	-36.9%	0.5%
Water/Sewage	15.556	-0.7%	16.5%	29.9%
Miscellaneous Civil (power, pipelines, etc.)	13.654	-16.4%	-52.7%	-18.2%
<b>HEAVY ENGINEERING (Civil)</b>	<b>83.957</b>	<b>-7.8%</b>	<b>-11.6%</b>	<b>9.9%</b>
<b>TOTAL NONRESIDENTIAL</b>	<b>201.671</b>	<b>-22.9%</b>	<b>-26.8%</b>	<b>10.5%</b>

\* Includes transportation terminals and sports arenas.

Source: ConstructConnect Research Group/Table: ConstructConnect.

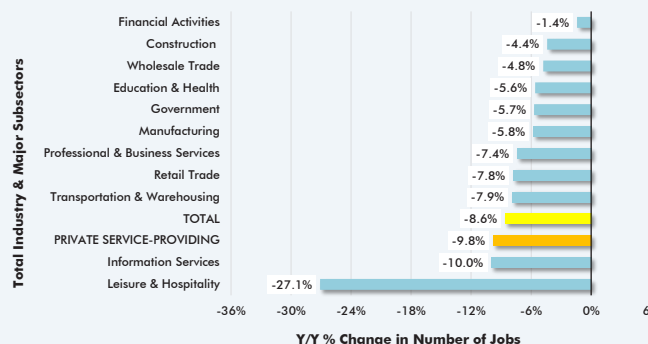
The sector suffering the most is 'leisure and hospitality'. Year-over-year employment at hotels and motels and in restaurants and bars is -27.1% year over year. The unemployment rate in the sector is 28.9% NSA (but know that in April, it peaked at 39.3%). It's no shock that hotel/motel construction starts to date this year are -44.6% compared with January-June 2019. The weakness in the accommodation and food services sector explains why part-time jobs have been devastated more than full-time jobs in this current (and hopefully brief) recession and why young adults have been subjected to an inordinately large share of the layoffs.

## Construction the Only Sector with a Jobs Claw-back Rate over 50%

Table 2 highlights the degree to which employment in each sector has rebounded after 'taking it on the chin' in April-May. The methodology compares two gaps in jobs levels — June-versus-February's deficit (since February was the last 'normal' month before COVID came calling) divided by April-versus-February's deficit (the 'Big Drop'). Subtracting the resulting ratio from one yields a 'claw-back' figure.

Total jobs are now -14.6 million whereas they were -20.5 million in the 'Big Drop'. The shortfall is still 71.2% (-14.6/-20.5 = 71.2%), meaning the claw-back percentage is 28.6% (1.000-0.712).

**GRAPH 1: Y/Y JOBS CHANGE, U.S. TOTAL INDUSTRY &  
MAJOR SUBSECTORS — JUNE 2020**  
(BASED ON SEASONALLY ADJUSTED PAYROLL DATA)



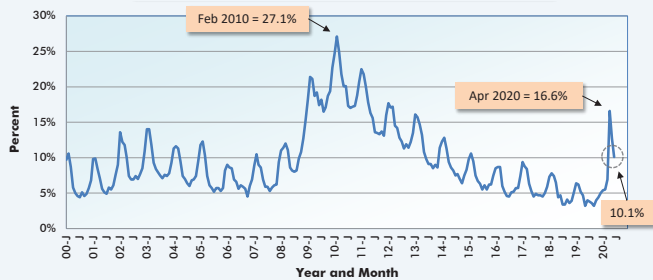
Within the hardest-hit sector, 'leisure & hospitality' (-27.1% y/y), 'hotels/motels' was -37.4%, 'restaurants & bars', -23.7%, and 'amusements/gambling', -32.2%.

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

Continued on page 3

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**GRAPH 2: U.S. CONSTRUCTION UNEMPLOYMENT RATE (NOT SEASONALLY ADJUSTED - NSA)**



Current through June, 2020. Data source: Bureau of Labor Statistics (BLS)/Chart: ConstructConnect.

Among industrial sub-sectors, construction has clawed back the largest proportion of its earlier jobs loss, 51.6%. Whereas construction's jobs deficit in April was -975,000, it is now only -472,000. And the percentage change decline in the sector has shifted from -12.8% to -6.2%.

The economy won't truly return to great health until the total jobs claw-back reaches 100%.

## Engineering Starts have been Most Tenacious

June 2020's month to month (m/m) increase in total nonresidential construction starts of +10.5% was broadly-based, with commercial at +28.3%; institutional, +23.0%; and heavy engineering/civil, +9.9%. Industrial, though, fell on the rocks, -91.7%.

The -26.8% performance of June 2020 versus June 2019 (y/y) total nonresidential starts resulted from declines in all four major type-of-structure categories. Striking the sourest note was industrial, -81.7%, followed by commercial, -46.5%; institutional, -26.1%; and engineering, -11.6%.

Year-to-date total nonresidential starts (-22.9%) in the latest month also offered slim pickings as every major sub-category was in deficit: industrial, -77.3%; commercial, -31.3%; institutional, -13.1%; and engineering, -7.8%.

## 3 Sub-categories with Across the Board Gains: Roads, Military & Laboratories

Year to date, the two sub-categories of construction types accounting for the largest dollar volumes have been 'schools/colleges' (\$37.4 billion) and 'roads/highways' (\$34.6 billion). Far back, in third position, has been 'water/sewage' (\$15.6 billion).

Year to date, 'schools/colleges' have claimed a 62% share of institutional work and 'roads/highways', a 41% share of engineering.

June's educational facility starts were +36.7% m/m, but -19.7% y/y and -15.4% ytd. Street starts, though, were uniformly positive: +6.5% m/m; +7.5% y/y; and +2.6% ytd.

Among all sub-categories of construction, only two others were on the plus side across the board in June: 'military' (+29.7% m/m; +76.4% y/y; and +171.3% ytd) and 'laboratories' (+114.3% m/m; +78.0% y/y; and +111.0% ytd).

Appearing under engineering, as well, 'water/sewage' starts have faltered only slightly (+29.9% m/m and +16.5% y/y, but -0.7% ytd). 'Bridge' starts have been +45.4% m/m and +18.4% y/y, but -23.5% ytd. And 'miscellaneous civil' (pipelines, rapid transit, etc.) has a record of -18.2% m/m, -52.7% y/y and -16.4% ytd.

Through first half 2020, 'private office buildings' and 'warehouses' have been competing for largest share of commercial starts, at 23% and 22% respectively. The former in the latest month was +117.7% m/m, but -68.7% y/y and -33.9% ytd. The latter was +14.6% m/m, but -16.2% y/y and -2.7% ytd.

Within institutional, combining the three sub-categories 'hospital/clinic', 'nursing/assisted living' and 'miscellaneous medical' provides a 'health care facility' summation that has been -19.7% m/m, -55.5% y/y and -33.6% ytd.

## Trend Graphs Begin to Capture Lost Momentum

Most of the 12-month moving-average trend graphs on page 6 continue to derive momentum from pre-coronavirus activity levels. Only during the latest three months (out of 12 months) has COVID-19 emphatically asserted its negative presence. Nevertheless, almost all the curves have been turning down lately.

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

The Big Drop		Change in Number of Jobs (Millions)		% Change		Claw Back
April 2020 vs Feb 2020 (Feb was the last month unaffected by COVID-19)		Versus Feb 2020 (Feb was the last month unaffected by COVID-19)	Vs. May 2020 (i.e., Previous month)	Versus Feb 2020 (Feb was the last month unaffected by COVID-19)	Vs. May 2020 (i.e., Previous month)	
-20,500	-13.5%	Grand Total	-14,640	4,800	-5.6%	28.6%
-17,200	-15.9%	Private Services-Providing	-11,852	4,263	-10.9%	31.1%
-1,330	-10.4%	Manufacturing	-0,757	0,356	-5.9%	43.1%
-975	-12.8%	Construction	-0,472	0,158	-6.2%	51.6%
-2,107	-13.5%	Retail Trade	-1,273	0,740	-8.1%	39.6%
-0,584	-10.3%	Transportation & Warehouse	-0,499	0,099	-8.8%	14.6%
-0,262	-3.0%	Financial Activities	-0,237	0,032	-2.7%	9.5%
-2,128	-9.9%	Professional & Business	-1,809	0,306	-8.4%	15.0%
-0,254	-8.8%	Information Services	-0,315	0,009	-10.9%	n/a
-2,544	-10.4%	Education and Health	-1,814	0,568	-7.4%	28.7%
-7,653	-46.8%	Leisure & Hospitality	-4,827	2,088	-28.6%	36.9%
-980	-4.3%	Government	-1,469	0,033	-6.5%	0.2%

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

There are three notable outliers. 'Retail' has been descending for years. And 'roads/highways' and 'water/sewage' are showing no ill effects whatsoever, so far.

## Compensation Rates Vault Higher, but not for Construction

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 what follows, keep in mind that the recent employment devastation has particularly sideswiped lower-paying jobs. Therefore, average compensation rates for jobs remaining have risen. Also, for many 'essential' workers, there have been bonuses and hazard pay.

From Table B-3 (including supervisory personnel) 'all-jobs' earnings y/y in June were +5.0% hourly and +5.3% weekly. Construction workers were left in the dust, at +2.9% hourly and +1.8% weekly. From Table B-8 (excluding bosses), the 'all jobs' pay increases were +5.4% hourly and +6.4% weekly. Construction workers received +3.0% hourly and +2.2% weekly.

## 3 PPI Construction Costing Series — 1 Advance; 2 Retreats

At the time of writing, June's PPI results are not yet available. Consequently, the following is a repeat of what appeared in last month's *Industry Snapshot*. May 2020's y/y results for three BLS Producer Price Index (PPI) series were as follows: 'construction materials special index', -1.8% (more negative than April's -1.1%); 'inputs to new construction index, excluding capital investment, labor and imports', -3.2% (less negative than April's -4.0%); and 'final demand construction', +2.5% (smaller than April's +2.8%).

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 -19.3% Ytd

From Table 5 on page 8 of this report, ConstructConnect's total residential starts in June were +11.6% m/m, -23.4% y/y and -12.7% ytd. The latest month's multi-unit starts were +1.3% m/m, -41.6% y/y and -25.0% ytd. Single-family starts were +15.2% m/m, -15.4% y/y, and -7.1% ytd. Combining residential and nonresidential, 'Grand Total' construction starts in June 2020 were +10.9% m/m, -25.6% y/y and -19.3% 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 3: VALUE OF UNITED STATES CONSTRUCTION STARTS —**  
**ConstructConnect® INSIGHT VERSION — JUNE 2020**  
**ARRANGED TO MATCH THE ALPHABETICAL CATEGORY DROP-DOWN MENUS IN INSIGHT**

	Jan-Jun 2020 (\$ billions)	% Change Jan-Jun 20 vs Jan-Jun 19	% Change Jun 20 vs Jun 19	% Change Jun 20 vs May 20
<b>Summary</b>				
CIVIL	83.957	-7.8%	-11.6%	9.9%
NONRESIDENTIAL BUILDING	117.714	-30.9%	-36.3%	11.0%
RESIDENTIAL	123.432	-12.7%	-23.4%	11.6%
GRAND TOTAL	325.103	-19.3%	-25.6%	10.9%
<b>Verticals</b>				
Airport	2.594	-22.0%	44.0%	57.6%
All Other Civil	11.607	14.8%	-5.9%	-12.3%
Bridges	13.399	-23.5%	18.4%	45.4%
Dams / Canals / Marine Work	4.151	-8.0%	-36.9%	0.5%
Power Infrastructure	2.047	-67.0%	-93.2%	-54.6%
Roads	34.602	2.6%	7.5%	6.5%
Water and Sewage Treatment	15.556	-0.7%	16.5%	29.9%
<b>CIVIL</b>	83.957	-7.8%	-11.6%	9.9%
Offices (private)	10.914	-33.9%	-68.7%	117.7%
Parking Garages	0.972	-46.5%	-57.2%	-23.8%
Transportation Terminals	1.238	-80.8%	54.9%	-17.4%
<b>Commercial (small subset)</b>	13.124	-47.0%	-64.4%	60.9%
Amusement	3.222	-6.0%	-33.8%	51.3%
Libraries / Museums	2.414	28.1%	-16.8%	43.6%
Religious	0.766	-24.6%	-62.6%	-41.0%
Sports Arenas / Convention Centers	2.307	-37.8%	16.0%	191.7%
<b>Community</b>	8.710	-13.2%	-22.9%	59.4%
College / University	8.900	-17.4%	8.5%	55.9%
Elementary / Pre School	12.096	-7.3%	4.1%	32.9%
Jr / Sr High School	15.433	-20.2%	-44.1%	26.4%
Special / Vocational	0.965	-6.8%	98.8%	135.7%
<b>Educational</b>	37.393	-15.4%	-19.7%	36.7%
Courthouses	0.886	80.0%	34.7%	-16.1%
Fire and Police Stations	1.536	-8.0%	-55.1%	-9.7%
Government Offices	4.939	-0.6%	-19.9%	9.2%
Prisons	1.036	16.1%	41.5%	45.7%
<b>Government</b>	8.397	4.7%	-21.8%	9.0%
Industrial Labs / Labs / School Labs	1.114	11.0%	78.0%	114.3%
Manufacturing	6.121	-77.3%	-81.7%	-91.7%
Warehouses	10.732	-2.7%	-16.2%	14.6%
<b>Industrial</b>	17.967	-53.9%	-32.6%	-42.4%
Hospitals / Clinics	5.553	-28.0%	-57.2%	6.2%
Medical Misc.	3.337	-33.3%	-63.2%	-47.8%
Nursing Homes	3.132	-41.8%	-36.7%	-17.6%
<b>Medical</b>	12.022	-33.6%	-55.5%	-19.7%
<b>Military</b>	4.730	171.3%	76.4%	29.7%
Hotels	6.450	-44.6%	-73.7%	-2.0%
Retail Misc.	2.719	-21.6%	-22.4%	25.7%
Shopping	6.202	-34.6%	-45.1%	4.1%
<b>Retail</b>	15.371	-37.5%	-54.4%	6.9%
<b>NONRESIDENTIAL BUILDING</b>	117.714	-30.9%	-36.3%	11.0%
Multi-Family	33.030	-25.0%	-41.6%	1.3%
Single-Family	90.402	-7.1%	-15.4%	15.2%
<b>RESIDENTIAL</b>	123.432	-12.7%	-23.4%	11.6%
<b>NONRESIDENTIAL</b>	201.671	-22.9%	-26.8%	10.5%
<b>GRAND TOTAL</b>	325.103	-19.3%	-25.6%	10.9%

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.



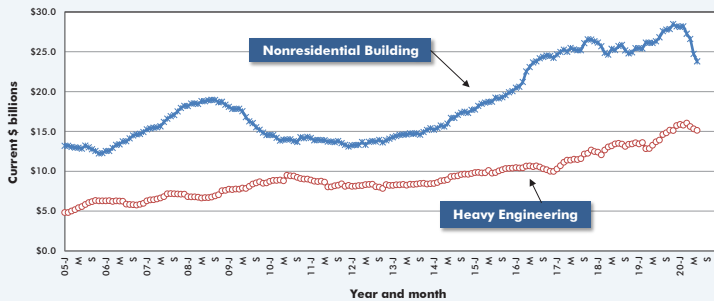
**TABLE 4: ConstructConnect's TOP 10 PROJECT STARTS IN JUNE 2020**

LOCATION (EAST TO WEST)	TYPE OF CONSTRUCTION	DESCRIPTION	SQUARE FEET 000S*	DOLLARS 000,000S
<b>Connecticut</b> New Haven	Institutional	Peabody Museum Of Natural History - Museum Renovation and Addition (2 structures; 4 stories) 170 Whitney Ave Yale Peabody Museum of Natural History	45	\$200
<b>New York</b> Liverpool	Industrial	Amazon Distribution Center / Liverpool (1 structure; 5 stories) 7209 Morgan Rd Trammell Crow - Northeast Metro	3,700	\$280
<b>Maryland</b> Silver Spring	Residential	Ripley II (3 structures; 30 stories; 440 units) 8210 Dixon Ave Washington Property Company	437	\$150
<b>Florida</b> Lake City	Civil/Engineering	I-10 Widening (3 structures) I-10 FDOT - District 2 - Asset Maintenance Lettings	*	\$176
<b>Ohio</b> Columbus	Civil/Engineering	Buckeye XPress Project (2 structures) Multiple Locations TC Energy	*	\$709
<b>Texas</b> Richmond	Industrial	Project Miriam - Amazon Fulfillment Center (1 structure) 10507 Harlem Rd Panattoni Development Co.	3,402	\$221
<b>New Mexico</b> Albuquerque	Institutional	UNMH New Hospital Tower (2 structures; 96 beds) 2211 Lomas Blvd NE University of New Mexico - Purchasing	570	\$330
<b>Washington</b> Seattle	Civil/Engineering	Seattle Light Rail Development - Federal Way Link - Sound Transit (2 structures) Multiple Locations Sound Transit	*	\$1,400
Renton	Civil/Engineering	I-405/Renton to Bellevue - Corridor Widening and Electronic Toll Lane (5 structures) I-405 Washington State Department of Transportation (WSDOT)	*	\$705
<b>California</b> San Bernardino	Civil/Engineering	Design and Build the I-10 Corridor Contract 1 Project (2 structures) I-10 San Bernardino County Transportation Authority (SBCTA)	*	\$673
<b>TOTALS:</b>			<b>8,154</b>	<b>\$4,844</b>

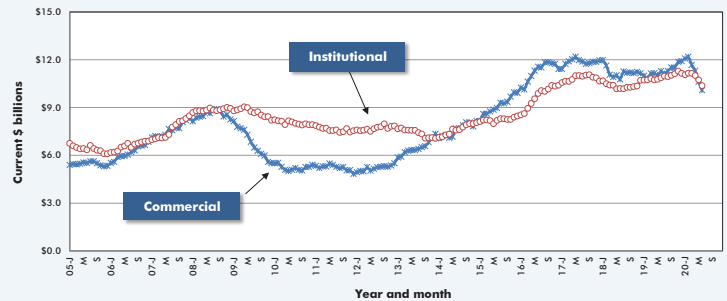
\*A square footage measure does not apply for alteration, some forms of industrial (e.g., petrochemical) and most engineering/civil work.

Source: ConstructConnect/Table: ConstructConnect.

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



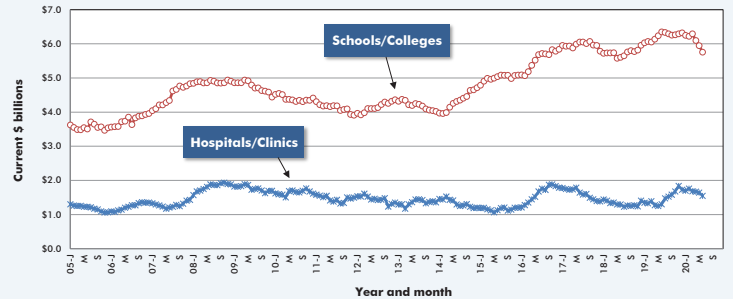
**GRAPH 4: U.S. COMMERCIAL AND INSTITUTIONAL CONSTRUCTION STARTS — ConstructConnect® (12-MONTH MOVING AVERAGES)**



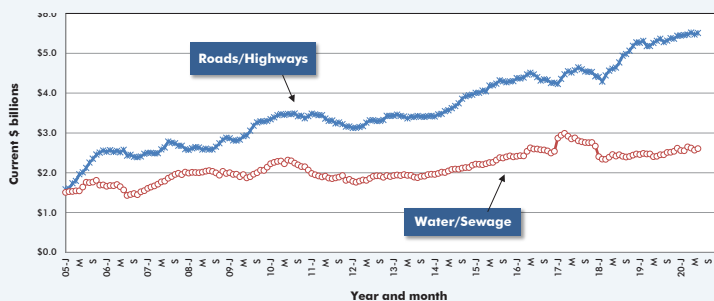
**GRAPH 5: U.S. RETAIL AND PRIVATE OFFICE BUILDING CONSTRUCTION STARTS — ConstructConnect® (12-MONTH MOVING AVERAGES)**



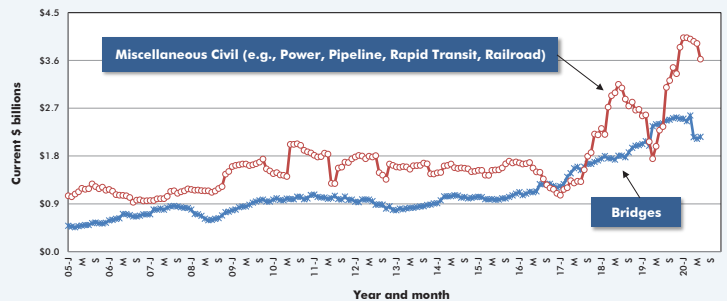
**GRAPH 6: U.S. HOSPITAL/CLINIC AND SCHOOL/COLLEGE CONSTRUCTION STARTS — ConstructConnect® (12-MONTH MOVING AVERAGES)**



**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 June, 2020.

Source: ConstructConnect/Charts: ConstructConnect.

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

	Jan-Jun 2019	Jan-Jun 2020	% Change
Connecticut	\$3,191,782,512	\$1,911,130,912	-40.1%
Maine	\$987,247,035	\$864,597,328	-12.4%
Massachusetts	\$6,695,195,799	\$4,257,977,179	-36.4%
New Hampshire	\$883,096,181	\$465,285,440	-47.3%
Rhode Island	\$531,424,037	\$393,227,423	-26.0%
Vermont	\$233,288,381	\$382,429,309	63.9%
<b>Total New England</b>	<b>\$12,522,033,945</b>	<b>\$8,274,647,591</b>	<b>-33.9%</b>
New Jersey	\$3,656,351,908	\$3,620,801,324	-1.0%
New York	\$11,999,247,967	\$10,673,137,279	-11.1%
Pennsylvania	\$9,280,996,632	\$5,182,619,580	-44.2%
<b>Total Middle Atlantic</b>	<b>\$24,936,596,507</b>	<b>\$19,476,558,183</b>	<b>-21.9%</b>
<b>TOTAL NORTHEAST</b>	<b>\$37,458,630,452</b>	<b>\$27,751,205,774</b>	<b>-25.9%</b>
Illinois	\$7,586,974,607	\$7,927,951,052	4.5%
Indiana	\$4,147,093,158	\$4,207,605,066	1.5%
Michigan	\$4,389,443,168	\$3,817,314,235	-13.0%
Ohio	\$7,849,185,135	\$5,855,104,310	-25.4%
Wisconsin	\$5,878,506,605	\$4,785,054,352	-18.6%
<b>Total East North Central</b>	<b>\$29,851,202,673</b>	<b>\$26,593,029,015</b>	<b>-10.9%</b>
Iowa	\$2,894,076,408	\$3,173,905,221	9.7%
Kansas	\$2,969,986,990	\$1,743,837,232	-41.3%
Minnesota	\$6,653,503,043	\$4,333,700,710	-34.9%
Missouri	\$3,445,683,220	\$6,048,583,217	75.5%
Nebraska	\$2,286,485,831	\$2,665,062,394	16.6%
North Dakota	\$1,170,485,283	\$1,090,498,017	-6.8%
South Dakota	\$1,149,270,478	\$799,752,442	-30.4%
<b>Total West North Central</b>	<b>\$20,569,491,253</b>	<b>\$19,855,339,233</b>	<b>-3.5%</b>
<b>TOTAL MIDWEST</b>	<b>\$50,420,693,926</b>	<b>\$46,448,368,248</b>	<b>-7.9%</b>
Delaware	\$712,617,195	\$527,555,158	-26.0%
District of Columbia	\$1,073,272,530	\$451,721,684	-57.9%
Florida	\$15,134,358,440	\$11,439,110,972	-24.4%
Georgia	\$10,501,405,708	\$5,404,749,997	-48.5%
Maryland	\$4,172,619,504	\$3,771,382,012	-9.6%
North Carolina	\$7,103,298,075	\$5,335,766,361	-24.9%
South Carolina	\$3,801,437,432	\$2,658,707,083	-30.1%
Virginia	\$8,748,770,615	\$5,612,927,637	-35.8%
West Virginia	\$895,521,480	\$1,528,850,984	70.7%
<b>Total South Atlantic</b>	<b>\$52,143,300,979</b>	<b>\$36,730,771,888</b>	<b>-29.6%</b>
Alabama	\$5,995,387,631	\$2,739,295,230	-54.3%
Kentucky	\$3,588,036,309	\$1,616,454,812	-54.9%
Mississippi	\$1,446,378,697	\$1,671,750,401	15.6%
Tennessee	\$4,275,621,180	\$3,972,192,484	-7.1%
<b>Total East South Central</b>	<b>\$15,305,423,817</b>	<b>\$9,999,692,927</b>	<b>-34.7%</b>
Arkansas	\$1,440,994,963	\$2,059,076,739	42.9%
Louisiana	\$2,058,840,040	\$2,195,588,608	6.6%
Oklahoma	\$2,911,608,327	\$1,972,570,041	-32.3%
Texas	\$42,598,519,436	\$23,218,069,389	-45.5%
<b>Total West South Central</b>	<b>\$49,009,962,766</b>	<b>\$29,445,304,777</b>	<b>-39.9%</b>
<b>TOTAL SOUTH</b>	<b>\$116,458,687,562</b>	<b>\$76,175,769,592</b>	<b>-34.6%</b>
Arizona	\$4,650,745,249	\$4,352,769,967	-6.4%
Colorado	\$5,249,114,724	\$3,753,456,792	-28.5%
Idaho	\$1,262,320,034	\$770,449,988	-39.0%
Montana	\$725,901,973	\$786,759,865	8.4%
Nevada	\$3,206,889,910	\$2,204,648,598	-31.3%
New Mexico	\$776,793,231	\$1,339,128,393	72.4%
Utah	\$2,880,266,336	\$4,114,250,239	42.8%
Wyoming	\$3,623,043,886	\$595,389,006	-83.6%
<b>Total Mountain</b>	<b>\$22,375,075,343</b>	<b>\$17,916,852,848</b>	<b>-19.9%</b>
Alaska	\$546,034,168	\$550,163,682	0.8%
California	\$20,175,462,374	\$19,476,895,344	-3.5%
Hawaii	\$1,353,680,846	\$786,777,322	-41.9%
Oregon	\$2,798,914,438	\$2,295,435,862	-18.0%
Washington	\$9,948,087,363	\$10,269,510,533	3.2%
<b>Total Pacific</b>	<b>\$34,822,179,189</b>	<b>\$33,378,782,743</b>	<b>-4.1%</b>
<b>TOTAL WEST</b>	<b>\$57,197,254,532</b>	<b>\$51,295,635,591</b>	<b>-10.3%</b>
<b>TOTAL U.S.</b>	<b>\$261,535,266,472</b>	<b>\$201,670,979,205</b>	<b>-22.9%</b>

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

Source: ConstructConnect/Table: ConstructConnect.

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

	Latest month actuals			Moving averages (placed in end month)						Year to Date	
	Apr 20	May 20	Jun 20	Apr 20	May 20	Jun 20	Apr 20	May 20	Jun 20	Jan-Jun 2019	Jan-Jun 2020
Single Family	13,426	13,318	15,340	15,494	14,456	14,028	16,535	16,219	15,987	97,344	90,402
month-over-month % change	-19.2%	-0.8%	15.2%	-3.8%	-6.7%	-3.0%	-1.4%	-1.9%	-1.4%	-1.4%	-7.1%
year-over-year % change	-26.1%	-22.2%	-15.4%	-1.1%	-15.6%	-21.2%	0.4%	0.1%	-0.9%	-8.3%	-21.1%
Apartment	4,493	4,610	4,669	5,542	5,129	4,591	7,641	7,556	7,279	44,037	33,030
month-over-month % change	-28.5%	2.6%	1.3%	-13.7%	-7.4%	-10.5%	-3.8%	-1.1%	-3.7%	-3.8%	-25.0%
year-over-year % change	-44.5%	-18.1%	-41.6%	-29.2%	-28.2%	-36.6%	-4.0%	-2.9%	-5.5%	-3.8%	-25.0%
<b>TOTAL RESIDENTIAL</b>	17,918	17,928	20,009	21,035	19,586	18,618	24,176	23,775	23,266	141,380	123,432
month-over-month % change	-21.8%	0.1%	11.6%	-6.6%	-6.9%	-4.9%	-2.8%	-1.7%	-2.1%	-7.0%	-12.7%
year-over-year % change	-31.8%	-21.2%	-23.4%	-10.5%	-19.3%	-25.7%	-1.0%	-0.8%	-2.4%	-7.0%	-12.7%
Hotel/Motel	0,998	0,503	0,493	1,324	0,867	0,665	1,728	1,629	1,514	11,641	6,450
month-over-month % change	-9.4%	-49.2%	-2.0%	-10.8%	-34.5%	-23.4%	-4.3%	-5.7%	-7.1%	-21.3%	-44.6%
year-over-year % change	-48.3%	-70.3%	-73.7%	-38.9%	-59.6%	-63.7%	-23.0%	-14.8%	-21.4%	-21.3%	-44.6%
Retail/Shopping	1,171	0,939	0,977	1,072	1,129	1,029	1,224	1,163	1,096	9,484	6,202
month-over-month % change	-8.2%	-19.9%	4.1%	3.2%	5.3%	-8.8%	-2.4%	-4.9%	-5.8%	-3.4%	-34.6%
year-over-year % change	-23.2%	-43.6%	-45.1%	-31.7%	-25.9%	-37.9%	-16.4%	-20.5%	-26.8%	-3.4%	-34.6%
Parking Garages	0,071	0,190	0,145	0,096	0,134	0,135	0,225	0,209	0,193	1,815	0,972
month-over-month % change	-49.6%	166.2%	-23.8%	-49.1%	39.9%	0.8%	-8.3%	-6.9%	-7.7%	28.7%	-46.5%
year-over-year % change	-77.4%	-49.6%	-57.2%	-63.3%	-61.8%	-60.6%	-15.6%	-19.0%	-29.3%	28.7%	-46.5%
Amusement	0,623	0,321	0,486	0,571	0,511	0,477	0,646	0,630	0,609	3,428	3,222
month-over-month % change	5.8%	-48.4%	51.3%	-4.4%	-10.5%	-6.7%	0.2%	-2.4%	-3.3%	3.5%	-6.0%
year-over-year % change	2.4%	-36.7%	-33.8%	6.5%	-10.2%	-22.7%	-4.4%	-5.0%	-4.0%	-19.8%	-6.0%
Office	1,707	0,668	1,454	2,005	1,127	1,276	2,905	2,798	2,532	16,516	10,914
month-over-month % change	69.5%	-60.9%	117.7%	-15.1%	-43.8%	13.2%	-4.2%	-3.7%	-9.5%	18.9%	-33.9%
year-over-year % change	-47.4%	-65.8%	-68.7%	-31.5%	-65.2%	-61.1%	21.7%	15.4%	-6.6%	18.9%	-33.9%
Governmental Offices	0,909	0,783	0,856	0,869	0,908	0,849	0,992	0,982	0,964	4,968	4,939
month-over-month % change	-11.7%	-13.9%	9.2%	9.0%	4.4%	-6.4%	-0.3%	-1.0%	-1.8%	0.5%	-0.6%
year-over-year % change	-3.6%	-12.9%	-19.9%	14.1%	7.7%	-12.5%	6.8%	6.7%	4.8%	0.5%	-0.6%
Laboratories	0,070	0,087	0,186	0,135	0,115	0,114	0,205	0,195	0,202	1,004	1,114
month-over-month % change	-62.8%	24.0%	114.3%	-47.6%	-14.9%	-0.7%	-4.8%	-4.6%	3.5%	-22.4%	11.0%
year-over-year % change	-64.1%	-56.7%	78.0%	-18.8%	-45.1%	-31.4%	-16.0%	-14.2%	-7.5%	-22.4%	11.0%
Warehouse	2,035	1,626	1,862	1,475	1,649	1,841	1,850	1,852	1,822	11,027	10,732
month-over-month % change	58.3%	-20.1%	14.6%	-15.0%	11.8%	11.7%	-4.4%	0.1%	-1.6%	4.8%	-2.7%
year-over-year % change	-33.2%	1.6%	-16.2%	-23.5%	-18.3%	-19.6%	-2.8%	2.7%	-1.8%	4.8%	-2.7%
Misc Commercial	0,462	0,423	0,651	0,573	0,517	0,512	1,523	1,144	1,155	10,144	3,545
month-over-month % change	-30.4%	-8.5%	53.9%	-14.4%	-9.8%	-0.9%	-1.7%	-24.9%	1.0%	34.9%	-65.1%
year-over-year % change	-40.1%	-91.5%	27.3%	-38.3%	-78.3%	-75.5%	46.4%	-16.9%	-7.0%	34.9%	-65.1%
<b>TOTAL COMMERCIAL</b>	8,047	5,540	7,110	8,120	6,956	6,899	11,296	10,602	10,087	70,029	48,091
month-over-month % change	10.5%	-31.2%	28.3%	-11.1%	-14.3%	-0.8%	-6.1%	-6.2%	-4.9%	6.1%	-31.3%
year-over-year % change	-36.0%	-60.1%	-46.5%	-27.8%	-47.6%	-47.9%	1.3%	-4.0%	-10.6%	2.3%	-31.3%
<b>TOTAL INDUSTRIAL (Manufacturing)</b>	0,567	2,153	0,179	0,880	1,121	0,967	3,695	2,825	2,758	26,981	6,121
month-over-month % change	-11.6%	279.6%	-91.7%	-18.0%	27.3%	-13.7%	-3.1%	-23.6%	-2.4%	35.7%	-77.3%
year-over-year % change	-71.7%	-82.9%	-81.7%	-74.2%	-83.2%	-81.4%	1.5%	-23.2%	-22.9%	35.7%	-77.3%
Religious	0,052	0,132	0,078	0,141	0,148	0,087	0,154	0,149	0,138	1,016	0,766
month-over-month % change	-80.0%	153.7%	-41.0%	16.3%	5.5%	-41.1%	-4.8%	-3.3%	-7.3%	-11.9%	-24.6%
year-over-year % change	-64.4%	-31.9%	-62.6%	3.1%	-10.9%	-52.3%	-14.8%	-16.3%	-19.1%	-11.9%	-24.6%
Hospitals/Clinics	0,691	0,780	0,828	0,936	0,703	0,766	1,670	1,641	1,548	7,710	5,553
month-over-month % change	8.1%	12.9%	6.2%	13.7%	-24.8%	9.0%	-0.6%	-1.7%	-5.6%	14.1%	-28.0%
year-over-year % change	-15.4%	-30.7%	-57.3%	-10.2%	-40.2%	-40.7%	31.4%	31.2%	19.0%	14.1%	-28.0%
Nursing/Assisted Living	0,595	0,473	0,390	0,500	0,526	0,486	0,675	0,635	0,617	5,382	3,132
month-over-month % change	16.8%	-20.5%	-17.6%	-10.5%	5.2%	-7.6%	-3.1%	-5.8%	-3.0%	-5.2%	-41.8%
year-over-year % change	-30.6%	-49.8%	-36.7%	-44.7%	-44.5%	-39.7%	-24.6%	-28.4%	-28.3%	-5.2%	-41.8%
Libraries/Museums	0,269	0,205	0,295	0,398	0,221	0,256	0,411	0,384	0,379	1,884	2,414
month-over-month % change	43.3%	-23.8%	43.6%	-27.4%	-44.5%	16.1%	-1.0%	-6.4%	-1.3%	38.1%	28.1%
year-over-year % change	-16.1%	-60.5%	-16.8%	51.0%	-45.2%	-35.6%	59.3%	45.5%	39.3%	38.1%	28.1%
Fire/Police/Courthouse/Prison	0,523	0,422	0,458	0,549	0,545	0,468	0,638	0,624	0,611	3,053	3,457
month-over-month % change	-24.2%	-19.4%	8.5%	16.8%	-0.8%	-14.2%	-2.1%	-2.1%	-2.1%	-12.4%	13.2%
year-over-year % change	-3.7%	-27.5%	-25.2%	23.1%	1.4%	-19.2%	-3.5%	-4.2%	-4.4%	-12.4%	13.2%
Military	1,974	0,488	0,633	0,990	1,051	1,031	0,639	0,656	0,679	1,744	4,730
month-over-month % change	185.4%	-75.3%	29.7%	81.5%	6.2%	-1.9%	29.5%	2.7%	3.5%	-11.6%	171.3%
year-over-year % change	766.2%	75.6%	76.4%	257.7%	236.8%	257.9%	42.6%	57.4%	62.9%	-11.6%	171.3%
Schools/Colleges	5,828	6,751	9,227	5,623	6,518	7,269	6,099	5,945	5,757	44,191	37,393
month-over-month % change	-16.4%	15.9%	36.7%	8.2%	15.9%	11.5%	-3.1%	-2.5%	-3.2%	11.8%	-15.4%
year-over-year % change	-28.6%	-21.5%	-19.7%	-9.6%	-14.6%	-22.8%	-0.6%	-4.7%	-9.3%	11.8%	-15.4%
Misc Medical	0,522	0,751	0,392	0,537	0,650	0,555	0,722	0,697	0,640	5,003	3,337
month-over-month % change	-22.7%	43.7%	-47.8%	3.9%	20.9%	-14.8%	3.5%	-3.5%	-8.1%	-15.8%	-33.3%
year-over-year % change	-44.7%	-29.1%	-63.2%	-12.5%	-25.6%	-45.8%	-18.1%	-21.5%	-25.4%	-15.8%	-33.3%
<b>TOTAL INSTITUTIONAL</b>	10,454	10,002	12,300	9,673	10,362	10,919	11,007	10,732	10,371	69,983	60,783
month-over-month % change	-1.6%	-4.3%	23.0%	3.5%	7.1%	5.4%	-1.2%	-2.5%	-3.4%	2.8%	-13.1%
year-over-year % change	-13.0%	-24.8%	-26.1%	-2.3%	-14.0%	-21.9%	2.6%	-0.4%	-4.6%	2.8%	-13.1%
Misc Non Residential	0,407	0,379	0,477	0,433	0,413	0,421	0,602	0,584	0,572	3,466	2,719
month-over-month % change	-10.0%	-6.9%	25.7%	-10.7%	-4.5%	1.9%	-3.6%	-3.0%	-2.0%	-6.3%	-21.6%
year-over-year % change	-40.1%	-36.5%	-22.4%	-28.7%	-33.3%	-33.2%	0.9%	-2.5%	-1.6%	-6.3%	-21.6%
<b>TOTAL NON-RES BUILDING</b>	19,475	18,074	20,066	19,106	18,852	19,205	26,599	24,742	23,788	170,459	117,714
month-over-month % change	2.5%	-7.2%	11.0%	-2.6%	-1.3%	1.9%	2.4%	-7.0%	-3.9%	6.5%	-30.9%
year-over-year % change	-28.6%	-55.2%	-36.3%	-24.1%	-42.2%	-41.9%	1.8%	-5.2%	-9.6%	6.5%	-30.9%
Airports	0,308	0,540	0,851	0,343	0,461	0,566	0,542	0,530	0,552	3,327	2,594
month-over-month % change	-42.5%	75.2%	57.6%	15.0%	34.6%	22.7%	-3.4%	-2.1%	4.1%	-9.4%	-22.0%
year-over-year % change	-42.9%	-20.5%	44.0%	-33.9%	-9.8%	-6.1%	-1.4%	-5.6%	-4.3%	-9.4%	-22.0%
Roads/Highways	7,685	6,749	7,189	5,618	6,630	7,208	5,519	5,469	5,511	33,729	34,602
month-over-month % change	40.9%	-12.2%	6.5%	29.9%	18.0%	8.7%	0.9%	-0.9%	0.8%	1.5%	2.6%
year-over-year % change	8.0%	-8.2%	7.5%	5.4%	0.9%	2.2%	6.5%	4.0%	3.7%	1.5%	2.6%
Bridges	1,724	1,861	2,706	2,206	2,186	2,097	2,155	2,122	2,157	17,509	13,399
month-over-month % change	-42.0%	7.9%	45.4%	-6.9%	-0.9%	-4.1%	15.9%	-1.7%	1.7%	-0.5%	-23.5%
year-over-year % change	-73.9%	-17.6%	18.4%	-38.4%	-37.7%	-43.6%	-8.7%	-11.4%	-10.0%	37.2%	-23.5%
Dams/Marine	0,807	0,693	0,697	0,601	0,732	0,732	0,829	0,715	0,681	4,514	4,151
month-over-month % change	15.9%	-14.1%	0.5%	-7.7%	21.7%	0.0%	4.6%	-13.7%	-4.7%	74.3%	-8.0%
year-over-year % change	119.7%	-66.4%	-36.9%	85.6%	-18.6%	-37.8%	54.3%	9.1%	-4.6%	74.3%	-8.0%
Water/Sewage	2,974	2,302	2,989	2,732	2,818	2,755	2,619	2,568	2,603	15,673	15,556
month-over-month % change	-6.5%	-22.6%	29.9%	12.4%	3.2%	-2.2%	-1.2%	-1.9%	1.4%	-4.2%	-0.7%
year-over-year % change	-11.4%	-20.9%	16.5%	9.8%	2.3%	-6.4%	5.9%	6.9%	7.9%	-4.2%	-0.7%
Misc Civil (Power, etc.)	3,100	3,843	3,145	1,246	2,220	2,729	3,957	3,917	3,825	16,324	13,654
month-over-month % change	-25.8%	220.3%	-18.3%	-30.5%	75.4%	22.9%	1.1%	-1.0%	-2.3%	22.5%	-16.4%
year-over-year % change	-31.4%	-11.0%	-52.7%	-17.7%	-16.5%	-35.6%	126.1%	97.6%	58.8%	22.5%	-16.4%
<b>TOTAL ENGINEERING (Civil)</b>	14,698	15,987	17,577	12,766	15,048	16,087	15,621	15,322	15,129	91,076	83,957
month-over-month % change	1.7%	8.8%	9.9%	7.3%	17.9%	6.9%	-2.6%	-1.9%	-1.3%	1.6%	-7.8%
year-over-year % change	-25.5%	-18.3%	-11.6%	-7.4%	-11.0%	-18.5%	21.5%	15.6%	10.4%	1.6%	-7.8%
<b>GRAND TOTAL</b>	52,092	51,990	57,651	52,907	53,485	53,911	66,396	63,839	62,183	402,915	325,103
month-over-month % change	-7.6%	-0.2%	10.9%	-2.8%	1.1%	0.8%	-2.6%	-3.9%	-2.6%	0.3%	-19.3%
year-over-year % change	-28.9%	-37.1%	-25.0%	-15.3%	-27.9%	-30.7%	0.8%	-2.6%	-2.6%	0.3%	-19.3%
<b>NON-RES BLDG + ENGINEERING</b>	34,174	34,042	37,440	31,872	33,099	35,293	42,220	40,064	38,917	261,535	201,671
month-over-month % change	2.1%	-0.3%	10.5%	-0.2%	3.4%	4.1%	-2.5%	-5.1%	-2.9%	4.7%	-22.9%
year-over-year % change	-27.5%	-43.2%	-26.8%	-18.2%	-31.5%	-33.1%	8.3%	1.8%	-2.7%	4.7%	-22.9%