

# Construction Industry Snapshot

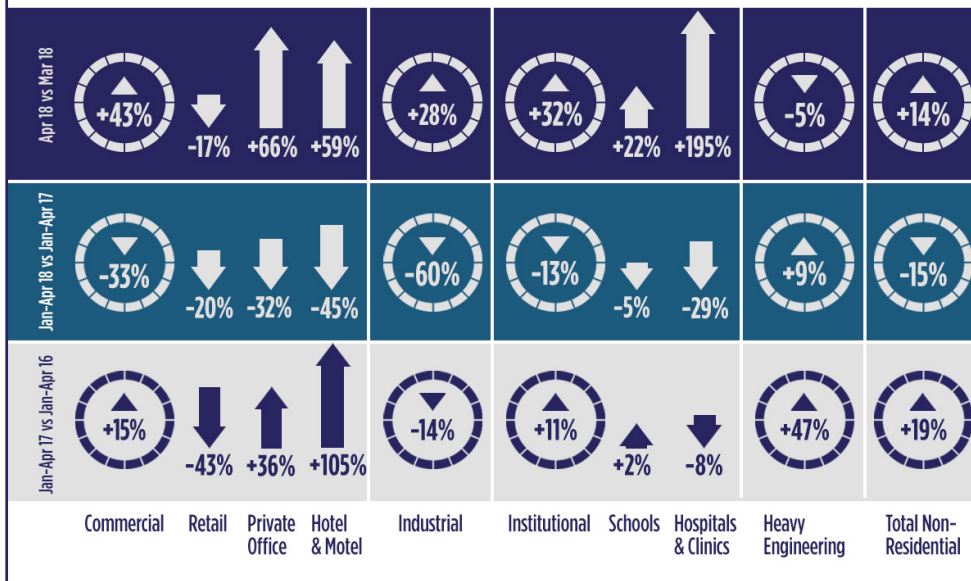
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(based on April Starts Stats)



Marketing Analytics Team

## ConstructConnect's April Starts +14%, a Bit Better than Usual Seasonal Uptick

ConstructConnect announced today that April's volume of construction starts, excluding residential activity, was \$42.5 billion. The latest month-to-month change was +14.3%. Moving from March to April usually accounts for the biggest gain due to seasonality. The long-term average increase in starts between the third and fourth months of the year has been +12.0%.



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## April's Notable Points

- The +14.3% rise in total non-residential starts month to month (m/m) in April was thanks to a groundswell of commercial work (+43.3%), with institutional (+32.4%) and industrial (+28.3%) also making solid contributions. But heavy engineering projects failed to make headway (-5.4%).
- The -5.0% figure for total non-residential starts in April 2018 relative to April 2017 (y/y) resulted from declines in industrial (-51.2%), commercial (-24.9%) and institutional (-11.0%) that could not be overcome by a more than one-quarter burst in heavy engineering (+26.3%).

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## ConstructConnect's April Starts +14%, A Bit Better than Usual Seasonal Uptick

ConstructConnect announced today that April's volume of construction starts, excluding residential activity, was \$42.5 billion. The latest month-to-month change was +14.3%. Moving from March to April usually accounts for the biggest gain due to seasonality. The long-term average increase in starts between the third and fourth months of the year has been +12.0%.

April of this year versus the same month of last year was -5.0%. April of this year versus the five-year average for April, from 2013 through 2017, however, was a much better +28.8%.

April 2018's year-to-date performance was -15%. Still, that was an improvement over March's first-reported pull-back of -22%. The year-to-date percentage changes early in 2018 are being held down by Q1 2017's exceptional strength in starts. This effect will gradually dissipate.

The starts figures throughout this report are not seasonally adjusted (NSA). Nor are they altered for inflation. They are expressed in what are termed 'current' as opposed to 'constant' dollars.

'Non-residential building' plus 'engineering/civil' work accounts for a larger share of total construction than residential activity. The former's combined proportion of total put-in-place construction in the Census Bureau's February report was 56%; the latter's share was 44%.

ConstructConnect's construction starts are leading indicators for the Census Bureau's capital investment or put-in-place series. Also, the reporting period for starts (i.e., April 2018) is one month ahead of the reporting period for the investment series (i.e., March 2018.)

Total employment in the U.S. construction sector improved by +17,000 jobs in April, according to the latest *Employment Situation* report from the Bureau of Labor Statistics (BLS). The average monthly climb in hiring in construction to date this year has been +26,000, slightly faster than the +24,000 increase that was realized from January through April of last year. As for the jobless rate in the sector, it was April 2017 with the better (i.e., lower) level of 6.3% than April 2018, 6.5%.

While total employment in the U.S. is presently +1.6% year over year, construction firms are hiring at a rate that is more than twice as speedy, +3.7%. No other industry in the economy is adding to payrolls as quickly. Transportation and warehousing is in second place, at +3.0%.

Within overall construction, the year-over-year number of jobs undertaking residential work is currently +5.1%. The comparable figures for non-residential building and heavy engineering are +3.1% and +1.2%. The *Employment Situation* report provides jobs data on three other industrial sub-sectors with close ties to construction. Year-over-year staffing is +3.6% at building material supply stores, +2.1% in real estate and +2.7% with architectural and engineering services firms.

The +14.3% rise in total non-residential starts month to month (m/m) in April was thanks to a groundswell of commercial work (+43.3%), with institutional (+32.4%) and industrial (+28.3%) also making solid contributions. But heavy engineering projects failed to make headway (-5.4%). There were groundbreakings on several large engineering projects in the latest month (see Top 10, page 4). But collectively, they could not match March's \$5.5 billion Atlantic Coast Pipeline.

The -5.0% figure for total non-residential starts in April 2018 relative to April 2017 (y/y) resulted from declines in industrial (-51.2%), commercial (-24.9%) and institutional (-11.0%) that could not be overcome by a more than one-quarter burst in heavy engineering (+26.3%).

The sources of the -15.4% year-to-date (i.e., ytd = Jan-Apr 2018 vs Jan-Apr 2017) decline in total non-residential starts were industrial (-60.1%), commercial (-32.9%) and institutional (-13.3%). The only construction sub-category to fight back was heavy engineering/civil (+9.0%).

The major contributors to heavy engineering starts so far in 2018 have been the 'road/highway' and 'miscellaneous civil' sub-categories, with shares of 35% and 28% respectively. The former in April was -0.3% m/m, +20.0% y/y and +5.9% ytd while the latter was -34.2% m/m, +72.8% y/y and +111.1% ytd. April's Top 10 had the Mountain Valley Pipeline start for \$3.5 billion.

The 'school/college' sub-category has accounted for more than half (a 58% slice) of total institutional starts to date in 2018. Such educational facility starts in April were +21.8% m/m; +3.8% y/y; but -4.9% ytd. The 'hospital/clinic' and 'nursing/assisted living' sub-categories, with shares of 13% and 10%, have accounted for the next largest portions of institutional through April of this year. In the latest month, 'hospital/clinic' starts impressed at +195.4% m/m, but were -33.5% y/y and -28.7% ytd. 'Nursing/assisted living' starts fluctuated from +33.9% m/m to -32.9% y/y, but on a ytd basis, they settled on neutrality, with virtually no change, -0.4%.

The largest shares of total commercial in the first third of this year were provided by the 'private office' (a 24% or nearly one-quarter slice), 'hotel/motel' (an 18% slice) and 'retail/shopping' (a 15% slice) sub-categories (15%). 'Private office' starts in April were upbeat m/m (+66.2%), but were considerably less rosy both y/y (-13.6%) and ytd (-32.1%). 'Hotel/motel' starts displayed a similar pattern: +59.3% m/m, but -45.5% y/y and -45.2%

**TABLE 1: VALUE OF UNITED STATES  
CONSTRUCTION STARTS — APRIL 2018  
(ConstructConnect™)**

	Jan - Apr 18 (\$ billions)	% Change Jan-Apr 18 vs Jan-Apr 17	% Change Apr 18 vs Apr 17	% Change Apr 18 vs Mar 18
Hotel/Motel	6.710	-45.2%	-45.5%	59.3%
Retail/Shopping	5.617	-20.4%	-23.3%	-16.7%
Parking Garage	0.701	-45.7%	-56.6%	54.8%
Amusement	2.414	3.1%	-7.2%	11.9%
Private Office	9.048	-32.1%	-13.6%	66.2%
Government Office	2.916	-18.9%	5.9%	69.4%
Laboratory	0.701	-22.8%	-31.6%	-19.1%
Warehouse	4.575	-37.9%	-38.2%	15.1%
Miscellaneous Commercial *	4.453	-38.0%	-4.6%	155.6%
<b>COMMERCIAL (big subset)</b>	<b>37.135</b>	<b>-32.9%</b>	<b>-24.9%</b>	<b>43.3%</b>
<b>INDUSTRIAL (Manufacturing)</b>	<b>4.069</b>	<b>-60.1%</b>	<b>-51.2%</b>	<b>28.3%</b>
Religious	0.545	-29.4%	-53.6%	-17.3%
Hospital/Clinic	4.760	-28.7%	-33.5%	195.4%
Nursing/Assisted Living	3.605	-0.4%	-32.9%	33.9%
Library/Museum	0.852	-31.8%	-38.6%	27.7%
Fire/Police/Courthouse/Prison	2.257	-39.0%	-2.6%	87.8%
Military	1.118	25.5%	-30.8%	-21.3%
School/College	21.433	-4.9%	3.8%	21.8%
Miscellaneous Medical	2.630	-24.3%	-22.4%	15.8%
<b>INSTITUTIONAL</b>	<b>37.201</b>	<b>-13.3%</b>	<b>-11.0%</b>	<b>32.4%</b>
Miscellaneous Non-residential	2.172	-0.8%	-4.7%	5.9%
<b>NON-RESIDENTIAL BUILDING</b>	<b>80.577</b>	<b>-27.2%</b>	<b>-20.2%</b>	<b>36.0%</b>
Airport	2.690	-26.3%	-3.0%	-39.3%
Road/Highway	20.186	5.9%	20.0%	-0.3%
Bridge	7.458	-9.0%	-3.7%	27.5%
Dam/Marine	1.586	16.2%	-3.7%	96.7%
Water/Sewage	10.234	-24.5%	24.6%	59.4%
Miscellaneous Civil (power, etc.)	16.099	111.1%	72.8%	-34.2%
<b>HEAVY ENGINEERING (Civil)</b>	<b>58.254</b>	<b>9.0%</b>	<b>26.3%</b>	<b>-5.4%</b>
<b>TOTAL NON-RESIDENTIAL</b>	<b>138.831</b>	<b>-15.4%</b>	<b>-5.0%</b>	<b>14.3%</b>

\* Includes transportation terminals and sports arenas.

Source: ConstructConnect Research Group/Table: ConstructConnect.

ytd. As for 'retail/shopping' starts in April, they were uniformly beleaguered: -16.7% m/m; -23.3% y/y; and -20.4% ytd.

The six graphs on page 5 show 12-month moving-average trend lines of starts for many of the major type-of-construction sub-categories. Except for 'schools/colleges', the curves for all the non-residential building sub-categories have been sloping downwards for a while. The tale has been different for the engineering sub-categories, however, with 'roads/highways' and 'bridges' appearing more robust, and the trend line for 'miscellaneous civil' launching into orbit.

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 April in both tables, and across all industries, average hourly wages were +2.6% y/y and average weekly wages were +2.9%. Beating the +3.0% benchmark stayed just out of reach.

Compensation rates for construction workers, though, were much better. From Table B-3, the gains were +3.5% for average hourly earnings and +4.1% for average weekly earnings. From Table B-8 (excluding supervisors), they were even healthier at +3.9% hourly and +4.7% weekly.

The value of construction starts each month is summarized 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 ultra-large, has a history of being more volatile than many other leading indicators for the economy. ♦

Alex Carrick

ConstructConnect has now 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 49,000 followers.

**TABLE 2: VALUE OF UNITED STATES CONSTRUCTION STARTS —**  
**ConstructConnect® INSIGHT VERSION — APRIL 2018**  
**ARRANGED TO MATCH THE ALPHABETICAL CATEGORY DROP-DOWN MENUS IN INSIGHT**

	Jan - Apr 18 (\$ billions)	% Change Jan-Apr 18 vs Jan-Apr 17	% Change Apr 18 vs Apr 17	% Change Apr 18 vs Mar 18
<b>Summary</b>				
CIVIL	58.254	9.0%	26.3%	-5.4%
NON-RESIDENTIAL BUILDING	80.577	-27.2%	-20.2%	36.0%
RESIDENTIAL	88.524	-14.8%	-11.1%	16.1%
GRAND TOTAL	227.356	-15.2%	-7.4%	14.9%
<b>Verticals</b>				
Airport	2.690	-26.3%	-3.0%	-39.3%
All Other Civil	12.308	208.4%	121.4%	-19.6%
Bridges	7.458	-9.0%	-3.7%	27.5%
Dams / Canals / Marine Work	1.586	16.2%	-3.7%	96.7%
Power Infrastructure	3.791	4.2%	-61.3%	-82.9%
Roads	20.186	5.9%	20.0%	-0.3%
Water and Sewage Treatment	10.234	-24.5%	24.6%	59.4%
<b>CIVIL</b>	58.254	9.0%	26.3%	-5.4%
Offices (private)	9.048	-32.1%	-13.6%	66.2%
Parking Garages	0.701	-45.7%	-56.6%	54.8%
Transportation Terminals	3.008	62.6%	46.4%	313.2%
<b>Commercial (small subset)</b>	12.757	-22.6%	0.5%	132.5%
Amusement	2.414	3.1%	-7.2%	11.9%
Libraries / Museums	0.852	-31.8%	-38.6%	27.7%
Religious	0.545	-29.4%	-53.6%	-17.3%
Sports Arenas / Convention Centers	1.445	-72.9%	-73.0%	-32.4%
<b>Community</b>	5.255	-45.8%	-47.1%	-4.4%
College / University	6.178	-26.4%	-34.1%	30.6%
Elementary / Pre School	6.045	10.3%	37.0%	37.1%
Jr / Sr High School	8.667	5.9%	28.8%	7.7%
Special / Vocational	0.544	12.7%	-37.6%	34.4%
<b>Educational</b>	21.433	-4.9%	3.8%	21.8%
Courthouses	0.273	-85.2%	-76.1%	30.7%
Fire and Police Stations	0.865	14.2%	1.4%	43.9%
Government Offices	2.916	-18.9%	5.9%	69.4%
Prisons	1.119	2.0%	134.2%	155.5%
<b>Government</b>	5.174	-29.1%	1.7%	77.6%
Industrial Labs / Labs / School Labs	0.701	-22.8%	-31.6%	-19.1%
Manufacturing	4.069	-60.1%	-51.2%	28.3%
Warehouses	4.575	-37.9%	-38.2%	15.1%
<b>Industrial</b>	9.345	-49.4%	-43.8%	14.4%
Hospitals / Clinics	4.760	-28.7%	-33.5%	195.4%
Medical Misc.	2.630	-24.3%	-22.4%	15.8%
Nursing Homes	3.605	-0.4%	-32.9%	33.9%
<b>Medical</b>	10.995	-20.1%	-31.0%	69.5%
<b>Military</b>	1.118	25.5%	-30.8%	-21.3%
Hotels	6.710	-45.2%	-45.5%	59.3%
Retail Misc.	2.172	-0.8%	-4.7%	5.9%
Shopping	5.617	-20.4%	-23.3%	-16.7%
<b>Retail</b>	14.498	-32.5%	-34.5%	14.0%
<b>NON-RESIDENTIAL BUILDING</b>	80.577	-27.2%	-20.2%	36.0%
Multi-Family	24.283	-42.3%	-38.4%	14.5%
Single-Family	64.241	3.9%	4.3%	16.6%
<b>RESIDENTIAL</b>	88.524	-14.8%	-11.1%	16.1%
<b>NON-RESIDENTIAL</b>	138.831	-15.4%	-5.0%	14.3%
<b>GRAND TOTAL</b>	227.356	-15.2%	-7.4%	14.9%

Table 1 conforms to the type-of-structure ordering adopted by many firms and organizations in the industry. Specifically, it breaks non-residential 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.

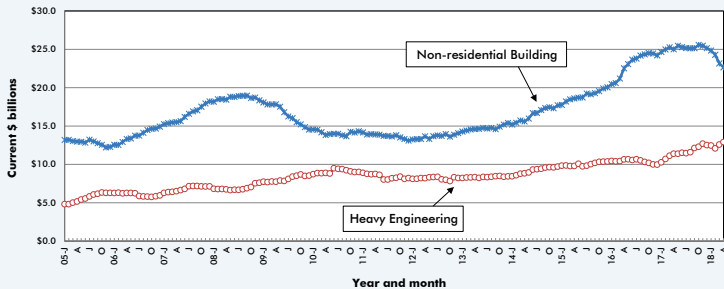
**TABLE 3: ConstructConnect's TOP 10 PROJECT STARTS IN APRIL 2018**

LOCATION (EAST TO WEST)	TYPE OF CONSTRUCTION	DESCRIPTION	SQUARE FEET 000S*	DOLLARS 000,000S
<b>New York</b> Long Island City	Commercial	Toyoko Inn / Long Island City (3 structures; 50 stories; 1265 rooms) 24-09 Jackson Ave Toyoko Inn New York, LLC	260	\$315
<b>New Jersey</b> Newark	Commercial	Newark Liberty International Airport - Terminal 1 (2 structures; 2 stories) 3 Brewster Rd Port Authority of New York and New Jersey - Procurement (PANYNJ)	1,000	\$1,400
Brooklyn	Engineering/Civil	C-34836, Coney Island Yard Complex Long Term Flood Mitigation in the Borough of Brooklyn (1 structure) Multiple Locations New York City Transit Bid Reception Desk	*	\$310
<b>District of Columbia</b> Washington	Engineering/Civil	Construction Management Services DC Clean Rivers Project Division J - Northeast Boundary Tunnel (1 structure) Northeast Boundary Tunnel District of Columbia Water and Sewer Authority	*	\$580
Washington	Institutional	MedStar Georgetown University Hospital Expansion (3 structures; 12 stories) 3800 Reservoir Rd NW Trammell Crow Co - Washington	400	\$567
<b>Virginia</b> Salem	Engineering/Civil	Mountain Valley Pipeline (1 structure) Multiple Locations NextEra Energy Resources LLC/NextEra Energy Inc	*	\$3,500
<b>Georgia</b> Social Circle (Walton County - East Atlanta)	Commercial	Facebook Social Circle Data Center Campus Phase 1 (1 structure) 240 Shire Parkway Facebook Inc - Corporate Headquarters	970	\$750
<b>Kansas</b> Lansing	Institutional	Lansing Correctional Facility Reconstruction - State of Kansas (1 structure) 301 E Kansas St Kansas Department of Corrections	401	\$362
Leawood	Engineering/Civil	Tomahawk Creek Wastewater Treatment Facility Improvements 10701 Lee Blvd Johnson County - Purchasing Division	*	\$335
<b>California</b> San Francisco	Residential	1500 Mission (aka Goodwill Site) (4 structures; 55 stories; 860 units) S Van Ness Ave and borders 11th St and Mission St Goodwill Urban Housing	1,268	\$300
<b>TOTALS:</b>			<b>4,299</b>	<b>\$8,419</b>

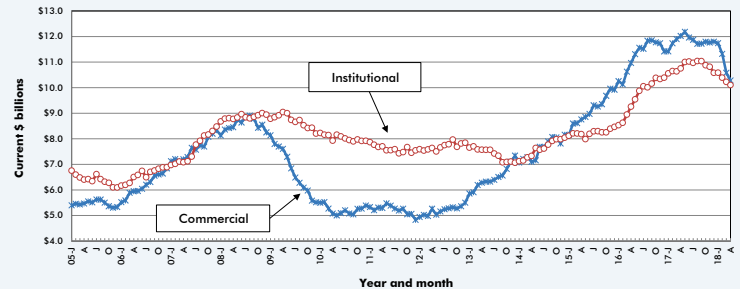
\*A square footage measure does not apply for alteration, some forms of industrial (e.g., petrochemical) and most engineering/civil work.

Source: ConstructConnect/Table: ConstructConnect.

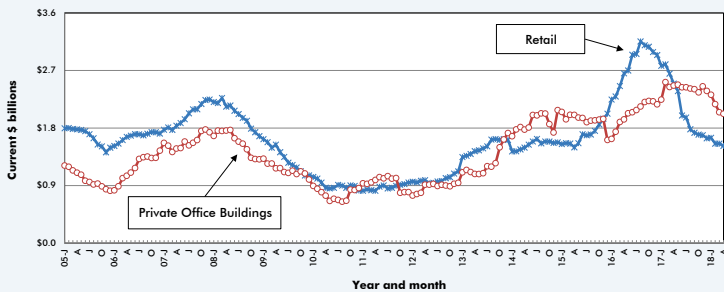
**GRAPH 1: U.S. NON-RESIDENTIAL CONSTRUCTION STARTS — ConstructConnect<sup>®</sup> (12-MONTH MOVING AVERAGES)**



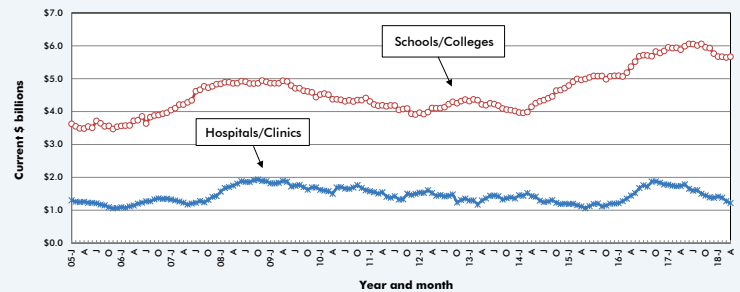
**GRAPH 2: U.S. COMMERCIAL AND INSTITUTIONAL CONSTRUCTION STARTS — ConstructConnect<sup>®</sup> (12-MONTH MOVING AVERAGES)**



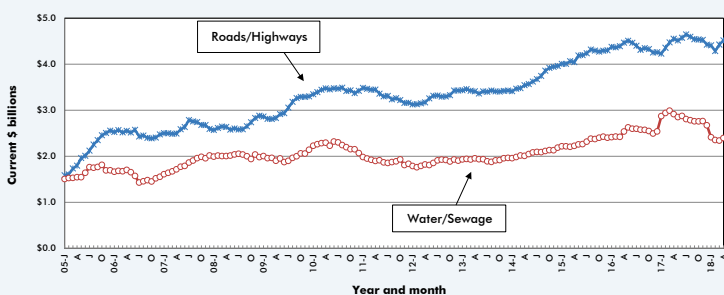
**GRAPH 3: U.S. RETAIL AND PRIVATE OFFICE BUILDING CONSTRUCTION STARTS — ConstructConnect<sup>®</sup> (12-MONTH MOVING AVERAGES)**



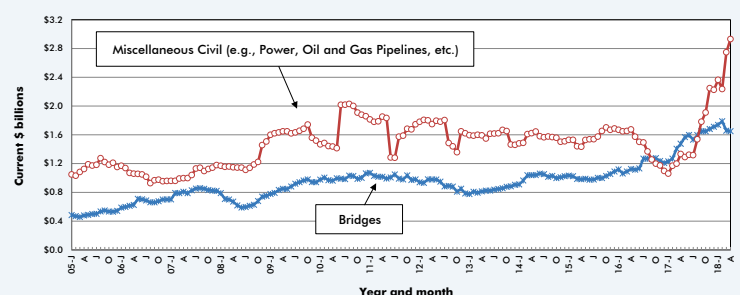
**GRAPH 4: U.S. HOSPITAL/CLINIC AND SCHOOL/COLLEGE CONSTRUCTION STARTS — ConstructConnect<sup>®</sup> (12-MONTH MOVING AVERAGES)**



**GRAPH 5: U.S. ROAD/HIGHWAY AND WATER/SEWAGE CONSTRUCTION STARTS — ConstructConnect<sup>®</sup> (12-MONTH MOVING AVERAGES)**



**GRAPH 6: U.S. BRIDGES AND MISCELLANEOUS CIVIL CONSTRUCTION STARTS — ConstructConnect<sup>®</sup> (12-MONTH MOVING AVERAGES)**



The last data points in all the graphs are for April, 2018.

Source: ConstructConnect/Charts: ConstructConnect.



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

	Jan-Apr 2017	Jan-Apr 2018	% Change
Connecticut	\$1,749,689,466	\$896,594,064	-48.8%
Maine	\$272,318,148	\$263,843,864	-3.1%
Massachusetts	\$3,596,096,412	\$1,920,789,910	-46.6%
New Hampshire	\$419,222,514	\$367,136,132	-12.4%
Rhode Island	\$374,157,944	\$494,002,117	32.0%
Vermont	\$230,429,571	\$197,885,581	-14.1%
<b>Total New England</b>	<b>\$6,641,914,055</b>	<b>\$4,140,251,668</b>	<b>-37.7%</b>
New Jersey	\$3,926,571,335	\$3,195,240,308	-18.6%
New York	\$14,109,801,141	\$6,740,750,525	-52.2%
Pennsylvania	\$4,334,286,884	\$3,578,617,044	-17.4%
<b>Total Middle Atlantic</b>	<b>\$22,370,659,360</b>	<b>\$13,514,607,877</b>	<b>-39.6%</b>
<b>TOTAL NORTHEAST</b>	<b>\$29,012,573,415</b>	<b>\$17,654,859,545</b>	<b>-39.1%</b>
Illinois	\$4,756,680,593	\$3,533,795,380	-25.7%
Indiana	\$2,038,289,503	\$2,489,197,233	22.1%
Michigan	\$8,245,803,747	\$2,480,106,848	-69.9%
Ohio	\$4,723,996,662	\$4,201,384,162	-11.1%
Wisconsin	\$3,350,977,759	\$2,800,554,638	-16.4%
<b>Total East North Central</b>	<b>\$23,115,748,264</b>	<b>\$15,505,038,261</b>	<b>-32.9%</b>
Iowa	\$1,842,061,902	\$1,754,107,461	-4.8%
Kansas	\$1,371,333,941	\$2,111,565,179	54.0%
Minnesota	\$2,267,400,628	\$1,976,633,175	-12.8%
Missouri	\$2,534,977,248	\$2,791,003,784	10.1%
Nebraska	\$1,387,785,653	\$796,872,930	-42.6%
North Dakota	\$590,945,525	\$681,480,563	15.3%
South Dakota	\$716,268,079	\$570,344,392	-20.4%
<b>Total West North Central</b>	<b>\$10,710,772,976</b>	<b>\$10,682,007,484</b>	<b>-0.3%</b>
<b>TOTAL MIDWEST</b>	<b>\$33,826,521,240</b>	<b>\$26,187,045,745</b>	<b>-22.6%</b>
Delaware	\$854,509,518	\$272,736,861	-68.1%
District of Columbia	\$730,892,490	\$2,050,699,763	180.6%
Florida	\$12,902,524,476	\$8,431,156,107	-34.7%
Georgia	\$5,366,776,107	\$3,687,305,422	-31.3%
Maryland	\$2,461,176,191	\$2,718,588,677	10.5%
North Carolina	\$4,584,673,673	\$4,146,038,279	-9.6%
South Carolina	\$3,123,536,302	\$2,028,501,897	-35.1%
Virginia	\$4,451,283,786	\$7,503,924,227	68.6%
West Virginia	\$332,592,920	\$5,746,331,921	1627.7%
<b>Total South Atlantic</b>	<b>\$34,807,965,463</b>	<b>\$36,585,283,154</b>	<b>5.1%</b>
Alabama	\$1,916,574,674	\$2,142,673,072	11.8%
Kentucky	\$1,197,477,340	\$1,298,869,207	8.5%
Mississippi	\$1,093,538,326	\$821,857,448	-24.8%
Tennessee	\$1,919,540,369	\$2,237,015,131	16.5%
<b>Total East South Central</b>	<b>\$6,127,130,709</b>	<b>\$6,500,414,858</b>	<b>6.1%</b>
Arkansas	\$1,042,345,697	\$955,900,476	-8.3%
Louisiana	\$2,715,615,323	\$2,073,223,861	-23.7%
Oklahoma	\$2,608,728,264	\$1,880,120,634	-27.9%
Texas	\$18,323,758,745	\$14,418,655,173	-21.3%
<b>Total West South Central</b>	<b>\$24,690,448,029</b>	<b>\$19,327,900,144</b>	<b>-21.7%</b>
<b>TOTAL SOUTH</b>	<b>\$65,625,544,201</b>	<b>\$62,413,598,156</b>	<b>-4.9%</b>
Arizona	\$2,852,399,285	\$2,791,823,696	-2.1%
Colorado	\$1,836,411,990	\$2,156,731,555	17.4%
Idaho	\$392,302,292	\$779,311,800	98.7%
Montana	\$322,868,819	\$405,844,879	25.7%
Nevada	\$763,550,113	\$2,124,923,538	178.3%
New Mexico	\$774,248,603	\$660,755,269	-14.7%
Utah	\$2,886,062,616	\$2,095,235,366	-27.4%
Wyoming	\$400,896,447	\$449,799,186	12.2%
<b>Total Mountain</b>	<b>\$10,228,740,165</b>	<b>\$11,464,425,289</b>	<b>12.1%</b>
Alaska	\$413,004,201	\$528,330,643	27.9%
California	\$18,699,069,697	\$14,259,446,809	-23.7%
Hawaii	\$385,205,753	\$728,584,076	89.1%
Oregon	\$2,423,113,282	\$2,215,973,110	-8.5%
Washington	\$3,478,077,609	\$3,379,011,446	-2.8%
<b>Total Pacific</b>	<b>\$25,398,470,542</b>	<b>\$21,111,346,084</b>	<b>-16.9%</b>
<b>TOTAL WEST</b>	<b>\$35,627,210,707</b>	<b>\$32,575,771,373</b>	<b>-8.6%</b>
<b>TOTAL U.S.</b>	<b>\$164,091,849,563</b>	<b>\$138,831,274,819</b>	<b>-15.4%</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 2018 — ConstructConnect®**  
**BILLIONS OF CURRENT \$\$, NOT SEASONALLY ADJUSTED (NSA)**

	Latest month actuals			Moving averages (placed in end month)			12-months			Year to Date	
	Feb 18	Mar 18	Apr 18	Feb 18	Mar 18	Apr 18	Feb 18	Mar 18	Apr 18	Jan-Apr 2017	Jan-Apr 2018
Single Family	14,580	16,475	19,212	13,832	15,010	16,756	16,806	16,797	16,863	61,824	64,241
month-over-month % change	4.3%	13.0%	16.6%	-3.3%	8.5%	11.6%	0.3%	-0.1%	0.4%	5.3%	3.9%
year-over-year % change	3.6%	-0.6%	4.3%	4.8%	3.7%	2.4%	7.7%	6.8%	6.6%		
Apartment	4,924	5,581	6,389	6,028	5,965	5,631	9,077	8,499	8,166	42,097	24,283
month-over-month % change	-33.4%	13.3%	14.5%	-17.8%	-1.1%	-5.6%	-4.0%	-6.4%	-3.9%	-2.1%	-42.3%
year-over-year % change	-47.9%	-55.4%	-38.4%	-30.6%	-43.6%	-47.8%	17.6%	3.4%	-2.1%	45.4%	-42.3%
TOTAL RESIDENTIAL	19,504	22,056	25,601	19,860	20,974	22,387	25,883	25,296	25,030	103,921	88,524
month-over-month % change	-8.7%	13.1%	16.1%	-8.2%	5.6%	6.7%	-1.3%	-2.3%	-1.1%	18.5%	-14.8%
year-over-year % change	-17.1%	-24.2%	-11.1%	-9.2%	-16.2%	-17.5%	11.0%	5.6%	3.6%		
Hotel/Motel	1,484	1,193	1,901	1,601	1,603	1,526	2,320	2,047	1,915	12,241	6,710
month-over-month % change	-30.4%	-19.6%	59.3%	-9.8%	0.1%	-4.8%	-4.2%	-11.8%	-6.5%	102.8%	-45.2%
year-over-year % change	-44.8%	-73.3%	-45.5%	-15.4%	-45.1%	-57.0%	25.8%	-2.1%	-13.3%		
Retail/Shopping	0,992	1,614	1,345	1,248	1,424	1,317	1,556	1,555	1,521	7,055	5,617
month-over-month % change	-40.4%	62.7%	-16.7%	-5.1%	14.1%	-7.5%	-5.6%	0.0%	-2.2%	-43.2%	-20.4%
year-over-year % change	-52.7%	-0.4%	-23.3%	-29.8%	-19.4%	-27.8%	-44.3%	-41.3%	-39.0%		
Parking Garages	0,074	0,159	0,246	0,282	0,152	0,160	0,294	0,268	0,241	1,291	0,701
month-over-month % change	-66.6%	114.7%	54.8%	9.6%	-46.3%	5.4%	0.5%	-8.9%	-10.0%	-4.7%	-45.7%
year-over-year % change	-18.6%	-66.3%	-56.6%	82.3%	-37.1%	-57.6%	-23.3%	-35.2%	-35.5%		
Amusement	0,483	0,539	0,603	0,712	0,604	0,542	0,652	0,656	0,652	2,342	2,414
month-over-month % change	-38.8%	11.6%	11.9%	6.1%	-15.3%	-10.3%	-1.2%	-0.9%	-0.6%	16.3%	3.1%
year-over-year % change	-17.1%	-11.3%	-7.2%	37.9%	7.0%	-11.7%	19.4%	17.3%	15.2%		
Office	3,951	1,150	1,911	2,342	2,379	2,337	2,174	2,048	2,023	13,335	9,048
month-over-month % change	94.0%	-70.9%	66.2%	30.4%	1.6%	-1.8%	-6.3%	-5.8%	-1.2%	36.0%	-32.1%
year-over-year % change	-30.8%	-56.8%	-13.6%	-32.2%	-35.8%	-33.7%	-13.7%	-16.1%	-17.9%		
Governmental Offices	0,841	0,562	0,953	0,824	0,655	0,785	0,876	0,814	0,818	3,598	2,916
month-over-month % change	50.3%	-33.2%	69.4%	11.2%	-4.8%	20.0%	3.8%	-7.6%	0.5%	-16.7%	-18.9%
year-over-year % change	84.6%	-56.8%	5.9%	-33.0%	-27.2%	-11.3%	-16.6%	-22.4%	-20.7%		
Laboratories	0,032	0,347	0,281	0,123	0,140	0,220	0,224	0,236	0,225	0,909	0,701
month-over-month % change	-21.9%	977.6%	-19.1%	-19.6%	13.9%	56.9%	-5.1%	5.3%	-4.6%	-65.2%	-22.8%
year-over-year % change	-81.7%	70.5%	-31.6%	-17.3%	-15.6%	-16.4%	-28.3%	48.5%	22.1%		
Warehouse	1,161	0,977	1,124	1,173	1,150	1,087	1,685	1,569	1,511	7,368	4,575
month-over-month % change	-11.5%	-15.9%	15.1%	-2.7%	-1.9%	-5.5%	-2.7%	-6.9%	-3.7%	86.7%	-37.9%
year-over-year % change	-32.5%	-58.8%	-38.2%	-16.7%	-37.8%	-44.8%	25.2%	7.9%	-0.4%		
Misc Commercial	0,171	0,902	2,306	1,296	0,716	1,126	1,534	1,388	1,378	7,183	4,453
month-over-month % change	-84.1%	428.3%	155.6%	-12.8%	-44.8%	57.4%	-2.7%	-9.6%	-0.7%	27.8%	-38.0%
year-over-year % change	-75.1%	-66.1%	-4.6%	45.1%	-55.0%	-41.4%	64.1%	27.8%	16.6%		
TOTAL COMMERCIAL	9,190	7,444	10,669	9,402	8,822	9,101	11,325	10,581	10,285	55,321	37,135
month-over-month % change	-6.5%	-19.0%	43.3%	1.4%	-6.2%	3.2%	-3.6%	-6.6%	-2.8%	15.1%	-32.9%
year-over-year % change	-35.3%	-54.5%	-24.9%	-15.9%	-35.6%	-39.0%	-3.5%	-11.1%	-14.5%		
TOTAL INDUSTRIAL (Manufacturing)	1,450	0,788	1,012	0,907	1,019	1,083	1,932	1,718	1,629	10,207	4,069
month-over-month % change	77.1%	-45.6%	28.3%	46.2%	12.4%	6.3%	2.6%	-11.1%	-5.2%	-14.2%	-60.1%
year-over-year % change	69.6%	-76.5%	-51.2%	-57.0%	-62.4%	-48.3%	2.4%	1.6%	5.6%		
Religious	0,101	0,175	0,145	0,122	0,133	0,140	0,177	0,180	0,166	0,771	0,545
month-over-month % change	-18.6%	73.6%	-17.3%	0.7%	9.4%	5.2%	-1.9%	1.5%	-7.7%	45.4%	-29.4%
year-over-year % change	-28.9%	22.6%	-53.6%	-22.1%	-13.0%	-29.5%	20.5%	19.4%	0.7%		
Hospitals/Clinics	0,960	0,448	1,323	1,216	1,146	0,910	1,382	1,275	1,219	6,673	4,760
month-over-month % change	-52.7%	-53.3%	195.4%	1.3%	-5.8%	-20.6%	-2.4%	-7.7%	-4.3%	-7.7%	-28.7%
year-over-year % change	-30.0%	-74.2%	-33.5%	-3.4%	-26.6%	-46.4%	-20.9%	-26.2%	-29.9%		
Nursing/Assisted Living	0,710	0,683	0,915	0,903	0,897	0,769	1,001	0,999	0,962	3,621	3,605
month-over-month % change	-45.2%	-3.8%	33.9%	-14.3%	-0.7%	-14.2%	-2.9%	-0.1%	-3.7%	13.5%	-0.4%
year-over-year % change	-33.6%	-2.0%	-32.9%	13.7%	19.2%	-26.3%	25.3%	23.8%	13.5%		
Libraries/Museums	0,142	0,155	0,198	0,219	0,218	0,165	0,300	0,275	0,265	1,249	0,852
month-over-month % change	-60.2%	9.2%	27.7%	-0.1%	-0.5%	-24.3%	2.1%	-8.3%	-3.8%	33.8%	-31.8%
year-over-year % change	106.4%	-65.9%	-38.6%	-32.1%	-29.4%	-41.4%	5.9%	-3.7%	-10.0%		
Fire/Police/Courthouse/Prison	0,273	0,452	0,849	0,484	0,469	0,525	0,579	0,581	0,579	3,699	2,257
month-over-month % change	-60.0%	65.4%	87.8%	-7.4%	-3.1%	11.8%	-14.9%	0.3%	-0.3%	132.7%	-39.0%
year-over-year % change	-81.7%	4.5%	-2.6%	-49.1%	-50.2%	-43.7%	-11.4%	-8.7%	-14.3%		
Military	0,333	0,289	0,227	0,261	0,297	0,283	0,413	0,421	0,413	0,891	1,118
month-over-month % change	23.4%	-13.2%	-21.3%	19.4%	13.8%	-4.8%	5.2%	2.1%	-2.0%	-3.3%	25.5%
year-over-year % change	276.7%	56.5%	-30.8%	59.6%	58.3%	41.1%	11.4%	14.8%	6.6%		
Schools/Colleges	3,493	6,059	7,383	3,742	4,684	5,712	5,670	5,647	5,670	22,544	21,433
month-over-month % change	-14.1%	64.1%	21.8%	1.1%	25.2%	21.9%	0.0%	-0.4%	0.4%	2.1%	-4.9%
year-over-year % change	-0.8%	-4.3%	3.8%	-21.9%	-9.0%	-0.2%	-4.4%	-4.9%	-3.6%		
Misc Medical	0,373	0,595	0,689	0,612	0,647	0,552	0,871	0,849	0,833	3,476	2,630
month-over-month % change	-61.7%	59.7%	15.8%	-17.4%	5.7%	-14.6%	-5.2%	-2.5%	-1.9%	62.6%	-24.3%
year-over-year % change	-60.7%	-30.2%	-22.4%	-25.4%	-25.0%	-38.4%	21.1%	17.3%	9.1%		
TOTAL INSTITUTIONAL	6,585	8,856	11,728	7,559	8,491	9,056	10,392	10,228	10,106	42,924	37,201
month-over-month % change	-34.4%	34.5%	32.4%	-4.1%	12.3%	6.7%	-1.8%	-1.6%	-1.2%	11.2%	-13.3%
year-over-year % change	-26.0%	-18.2%	-11.0%	-18.3%	-14.3%	-17.5%	-2.4%	-3.9%	-6.0%		
Misc Non Residential	0,422	0,573	0,607	0,448	0,522	0,534	0,635	0,633	0,631	2,189	2,172
month-over-month % change	-25.7%	35.7%	5.9%	-7.5%	11.3%	2.4%	-0.5%	-0.3%	-0.4%	-16.3%	-0.8%
year-over-year % change	-8.3%	-4.3%	-4.7%	-11.3%	0.8%	-5.5%	-9.7%	-7.9%	-8.0%		
TOTAL NON-RES BUILDING	17,648	17,662	24,016	18,337	18,854	19,775	24,283	23,160	22,652	110,641	80,577
month-over-month % change	-17.0%	0.1%	36.0%	0.3%	2.8%	4.9%	-2.3%	-4.6%	-2.2%	9.3%	-27.2%
year-over-year % change	-27.7%	-43.3%	-20.2%	-20.5%	-29.8%	-30.8%	-2.8%	-8.4%	-9.4%		
Airports	0,314	0,858	0,521	0,507	0,723	0,564	0,987	0,971	0,969	3,651	2,690
month-over-month % change	-68.5%	172.7%	-39.3%	-4.6%	42.6%	-22.0%	-11.3%	-1.7%	-0.1%	239.0%	-26.3%
year-over-year % change	-82.8%	-18.9%	-3.0%	-39.0%	-30.3%	-50.5%	50.4%	32.6%	26.0%		
Roads/Highways	2,940	6,723	6,703	3,058	4,494	5,456	4,285	4,425	4,519	19,061	20,186
month-over-month % change	-23.0%	128.7%	-0.3%	3.4%	46.9%	21.4%	-2.9%	3.3%	2.1%	22.5%	5.9%
year-over-year % change	-33.9%	33.6%	20.0%	-24.2%	0.1%	8.6%	-1.6%	-1.1%	-0.7%		
Bridges	1,833	1,646	2,099	1,778	1,786	1,859	1,789	1,657	1,651	8,194	7,458
month-over-month % change	-2.5%	-10.2%	27.5%	12.9%	0.5%	4.1%	2.9%	-7.4%	-0.4%	64.2%	-9.0%
year-over-year % change	48.7%	-49.0%	-3.7%	32.2%	-10.9%	-16.0%	40.9%	17.8%	11.9%		
Dams/More	0,333	0,312	0,613	0,377	0,324	0,419	0,442	0,445	0,443	1,365	1,586
month-over-month % change	1.5%	-6.4%	96.7%	-21.3%	-13.9%	29.3%	3.6%	0.7%	-0.4%	37.8%	16.2%
year-over-year % change	122.2%	14.5%	-3.7%	44.0%	33.6%	18.8%	41.8%	37.3%	29.2%		
Water/Sewage	1,795	2,115	3,372	2,153	2,287	2,428	2,353	2,341	2,396	13,552	10,234
month-over-month % change	-39.2%	17.8%	59.4%	0.2%	6.2%	6.1%	-2.5%	-0.5%	2.4%	50.0%	-24.5%
year-over-year % change	-28.6%	-6.6%	24.6%	-43.2%	-36.7%	-2.7%	-20.0%	-21.7%	-17.8%		
Misc Civil (Power, etc.)	0,526	7,918	5,214	1,185	3,628	4,553	2,237	2,748	2,931	7,628	16,099
month-over-month % change	-78.4%	1404.4%	-34.2%	-56.3%	206.1%	25.5%	-5.4%	22.8%	6.7%	59.0%	111.1%
year-over-year % change	-74.3%	343.6%	72.8%	-3.6%	136.1%	99.4%	91.3%	129.1%	119.8%		
TOTAL ENGINEERING (Civil)	7,742	19,572	18,525	9,058	13,243	15,280	12,093	12,587	12,909	53,451	58,254
month-over-month % change	-37.6%	152.8%	-5.4%	-13.0%	46.2%	15.4%	-3.0%	4.1%	2.6%	19.0%	-15.2%
year-over-year % change	-36.7%	43.5%	26.3%	-21.2%	2.4%	13.1%	13.0%	13.1%	13.4%		
GRAND TOTAL	44,894	59,289	68,142	47,255	53,071						