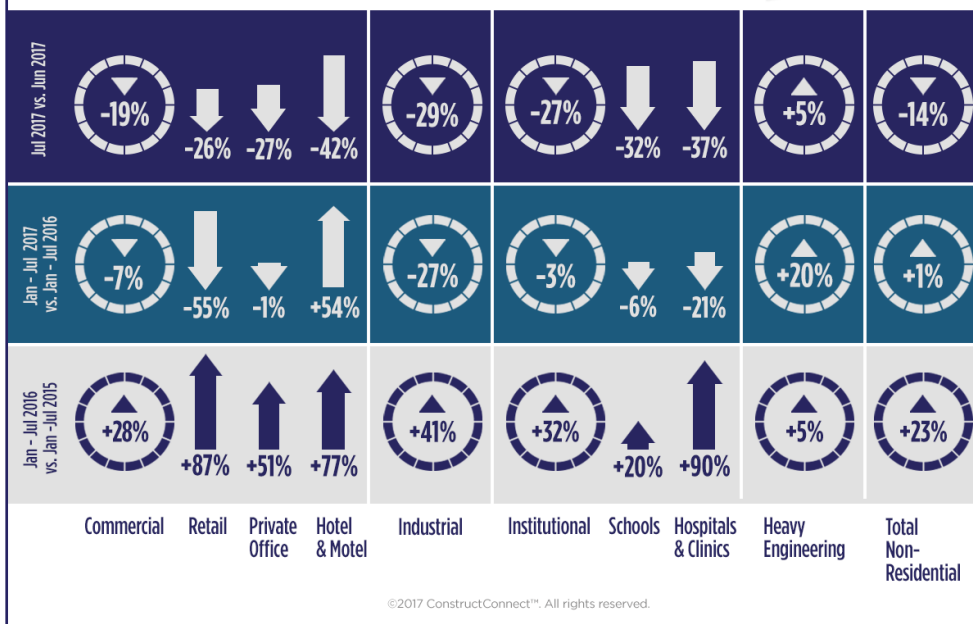


# Construction Industry Snapshot

Issued: August 2017  
(based on July Starts Stats)

## ConstructConnect's Ytd Starts +1% after July's Retreat of -14%

ConstructConnect announced today that July construction starts, excluding residential activity, fell -13.8% versus June. The usual June-to-July change, due to seasonality, is +3.5%. Year-to-date starts stayed barely positive at +0.5%.



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## July's Notable Points

- Month-to-month (m/m) starts overall (-13.8%) were led downwards by the industrial (-29.1%) and institutional (-27.4%) sub-categories, with commercial (-18.8%) also significantly failing to match its previous level. Only heavy engineering/civil successfully pulled off a gain (+4.7%).
- As for the non-residential decline (-17.6%) in this year's July versus last year's July (y/y), the major sub-categories of work again fell short, with industrial -27.6%, commercial -26.5% and institutional -21.1%. To say engineering, at -6.1%, wasn't quite as bad is faint praise.

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## ConstructConnect's Ytd Starts +1% after July's Retreat of -14%

ConstructConnect™ today announced a July volume of construction starts, excluding homebuilding activity, that amounted to \$30.8 billion. July's non-residential total was -13.8% versus the comparable sum in June. The usual June-to-July change, due to seasonality, is +3.5%.

July of this year versus July of last year was also weak, -17.6%. Standalone July of this year versus July's average level over the past five years (2012-2016 inclusive) was +0.7%.

Year-to-date starts through the first seven months of this year are now almost exactly the same as they were from January-to-July of last year. They are barely positive, at +0.5%.

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 considerably larger share of total construction than residential activity. The former's combined proportion of total put-in-place construction in the Census Bureau's June report was 58%; the latter's was 42%.

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., July 2017) is one month ahead of the reporting period for the investment series (i.e., June 2017.)

The total number of jobs in construction in the U.S. rose by +6,000 in July according to the latest *Employment Situation* report from the Bureau of Labor Statistics (BLS). Thanks to strong hiring in the on-site sector in January (+34,000) and February (+54,000), the monthly average increase through July of 2017 has been +17,000, a solid improvement versus the +11,000 figure on average through the same time frame in 2016. The year-over-year climb in 'hard hat' jobs is presently +2.8%, which is nearly double the increase for all jobs economy-wide (+1.5%).

The not seasonally adjusted (NSA) unemployment rate in construction in July of this year was 4.9%. For the same seventh month of last year, it had been a little tighter, at 4.5%.

Jobs with architectural and engineering firms climbed by +3.6% year over year in July. Healthy hiring by the design professions is an encouraging 'leading indicator' for construction. In other fields of employment with ties to construction, 'building material and supplies dealers' have raised payrolls by a mere +0.4% year over year. The 'oil and gas extraction' sector, though, has turned an important corner. After 26 months in a row of negative year-over-year jobs results, it has finally achieved increases in the latest two months, June (+0.1%) and July (+0.2%).

Month-to-month (m/m) starts overall (-13.8%) were led downwards by the industrial (-29.1%) and institutional (-27.4%) sub-categories, with commercial (-18.8%) also significantly failing to match its previous level. Only heavy engineering/civil successfully pulled off a gain (+4.7%).

As for the non-residential decline (-17.6%) in this year's July versus last year's July (y/y), the major sub-categories of work again fell short, with industrial -27.6%, commercial -26.5% and institutional -21.1%. To say engineering, at -6.1%, wasn't quite as bad is faint praise.

The year-to-date (ytd) total starts performance of +0.5% has resulted from an uplift in engineering (+19.9%) that has been almost exactly counterbalanced by combined downshifts in industrial (-27.2%), commercial (-7.1%) and institutional (-2.6%).

'Road/highway' work (with a 43% share) is the largest sub-category within engineering and in July its level of starts was -5.2% m/m; but +13.4% y/y; and +17.3% ytd. The second biggest component of civil, 'water/sewage' work (with a 21% slice), had starts that were down across the board: -17.6% m/m; -21.1% y/y; and -2.3% ytd. 'Bridge' work (with a current share of 16%) also plays a key role in civil. In July, its starts were +32.7% m/m and +40.9% ytd, but -26.6% y/y.

So far this year, 'hotel/motel' work has accounted for the largest proportion (22%) of commercial. Accommodation starts in July may have been -42.0% m/m and -48.8% y/y, but they were an impressive +53.7% ytd. The 'private office buildings' designation is next biggest within commercial (20%) and it was -27.4% m/m; -8.4% y/y; but an almost even -1.1% ytd.

'Retail/shopping' (14% of commercial) turned in a disastrous record in the latest month. 'Bricks and mortar' starts were -25.5% m/m; -32.0% y/y; and -54.7% ytd. Warehouses (12% of commercial), however, did exceptionally well: +61.7% m/m; +31.0% y/y; and +32.2% ytd.

The 'school/college' component has yielded 56% of total institutional starts in the first seven months of this year. In July, educational starts were -32.3% m/m; -14.4% y/y; and -6.3% ytd. 'Hospital/clinic' starts (with a 15% share) are next most significant within institutional. The health care segment also had a disappointing July: -37.2% m/m; -70.3% y/y; and -21.3% ytd.

There are four types-of-structures embedded within other categories that have been managing upbeat performances worthy of mention: 'sports stadiums/convention centers', +89.3% ytd; 'courthouses', +146.8% ytd; 'prisons', +35.0% ytd; and 'junior/senior high schools', +9.4% ytd.

### TABLE 1: VALUE OF UNITED STATES CONSTRUCTION STARTS — JULY 2017 (ConstructConnect™)

	Jan-Jul 17 (\$ billions)	% Change Jan-Jul 17 vs Jan-Jul 16	% Change Jul 17 vs Jul 16	% Change Jul 17 vs Jun 17
Hotel/Motel	18.120	53.7%	-48.8%	-42.0%
Retail/Shopping	10.924	-54.7%	-32.0%	-25.5%
Parking Garage	1.472	-53.3%	-82.2%	47.3%
Amusement	4.098	9.7%	-15.7%	-13.7%
Private Office	16.362	-1.1%	-8.4%	-27.4%
Government Office	6.470	-19.2%	-29.9%	13.3%
Laboratory	1.181	-64.0%	111.1%	-0.3%
Warehouse	10.029	32.2%	31.0%	61.7%
Miscellaneous Commercial *	11.957	39.8%	-27.7%	-47.7%
<b>COMMERCIAL (big subset)</b>	<b>80.612</b>	<b>-7.1%</b>	<b>-26.5%</b>	<b>-18.8%</b>
<b>INDUSTRIAL (Manufacturing)</b>	<b>10.708</b>	<b>-27.2%</b>	<b>-27.6%</b>	<b>-29.1%</b>
Religious	1.339	31.5%	42.3%	-26.0%
Hospital/Clinic	11.138	-21.3%	-70.3%	-37.2%
Nursing/Assisted Living	5.342	-5.1%	21.9%	-21.0%
Library/Museum	2.036	1.0%	117.0%	-2.2%
Fire/Police/Courthouse/Prison	5.329	51.5%	-19.6%	-24.4%
Military	2.567	12.8%	-16.7%	32.5%
School/College	42.827	-6.3%	-14.4%	-32.3%
Miscellaneous Medical	5.575	42.4%	-19.0%	-20.0%
<b>INSTITUTIONAL</b>	<b>76.152</b>	<b>-2.6%</b>	<b>-21.1%</b>	<b>-27.4%</b>
Miscellaneous Non-residential	3.905	-22.6%	-24.0%	17.5%
<b>NON-RESIDENTIAL BUILDING</b>	<b>171.377</b>	<b>-7.2%</b>	<b>-23.8%</b>	<b>-22.9%</b>
Airport	5.519	117.8%	-3.0%	66.6%
Road/Highway	37.191	17.3%	13.4%	-5.2%
Bridge	13.590	40.9%	-26.6%	32.7%
Dam/Marine	2.761	26.3%	71.9%	172.5%
Water/Sewage	17.956	-2.3%	-21.1%	-17.6%
Miscellaneous Civil (power, etc.)	10.444	23.0%	-25.0%	19.8%
<b>HEAVY ENGINEERING (Civil)</b>	<b>87.461</b>	<b>19.9%</b>	<b>-6.1%</b>	<b>4.7%</b>
<b>TOTAL NON-RESIDENTIAL</b>	<b>258.839</b>	<b>0.5%</b>	<b>-17.6%</b>	<b>-13.8%</b>

\* Includes transportation terminals and sports arenas.

Source: ConstructConnect Research Group/Table: ConstructConnect.

Table 2 on page three of this report re-orders and provides more detail on some of the type-of-structure categories in Table 1. The reasons for this 'second view' are set out in the footnote.

The six graphs on page five show 12-month moving average trend lines for major type-of-structure categories. While 'private office buildings', 'schools/colleges' and 'hospitals/clinics' all display curves that have recently been descending, the most severe pullback has been in 'retail'. On the flip side, only 'roads/highways' is sustaining a long-term pattern of moving upwards, as the past-couple-of-years' positive trend for 'bridges' has run into a snag of late.

As for compensation increases in the latest month, Table B-3 (which includes supervisory personnel) of the latest *Employment Situation* report from the BLS records a +2.4% y/y gain for both average hourly and average weekly earnings in the construction sector. The all-jobs hikes were a little better at +2.5% and +2.8% respectively. Table B-8 of the BLS report (which omits bosses), has construction workers' earnings at +2.5% y/y both hourly and weekly, while the national all-jobs increases weren't quite as 'meaty', at +2.4% both hourly and 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 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 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 46,000 followers.

**TABLE 2: VALUE OF UNITED STATES CONSTRUCTION STARTS —  
ConstructConnect™ INSIGHT VERSION — JULY 2017  
ARRANGED TO MATCH THE ALPHABETICAL CATEGORY DROP-DOWN MENUS IN INSIGHT**

	Jan-Jul 17 (\$ billions)	% Change Jan-Jul 17 vs Jan-Jul 16	% Change Jul 17 vs Jul 16	% Change Jul 17 vs Jun 17
<b>Summary</b>				
CIVIL	87.461	19.9%	-6.1%	4.7%
NON-RESIDENTIAL BUILDING	171.377	-7.2%	-23.8%	-22.9%
RESIDENTIAL	176.103	8.3%	-4.3%	-21.8%
<b>GRAND TOTAL</b>	<b>434.942</b>	<b>3.5%</b>	<b>-12.3%</b>	<b>-17.5%</b>
<b>Verticals</b>				
Airport	5.519	117.8%	-3.0%	66.6%
All Other Civil	6.392	-16.4%	-26.4%	50.6%
Bridges	13.590	40.9%	-26.6%	32.7%
Dams / Canals / Marine Work	2.761	26.3%	71.9%	172.5%
Power Infrastructure	4.053	379.7%	2.2%	-70.2%
Roads	37.191	17.3%	13.4%	-5.2%
Water and Sewage Treatment	17.956	-2.3%	-21.1%	-17.6%
<b>CIVIL</b>	<b>87.461</b>	<b>19.9%</b>	<b>-6.1%</b>	<b>4.7%</b>
Offices (private)	16.362	-1.1%	-8.4%	-27.4%
Parking Garages	1.472	-53.3%	-82.2%	47.3%
Transportation Terminals	2.609	-27.8%	-34.9%	-11.0%
<b>Commercial (small subset)</b>	<b>20.443</b>	<b>-12.3%</b>	<b>-29.5%</b>	<b>-23.0%</b>
Amusement	4.098	9.7%	-15.7%	-13.7%
Libraries / Museums	2.036	1.0%	117.0%	-2.2%
Religious	1.339	31.5%	42.3%	-26.0%
Sports Arenas / Convention Centers	9.348	89.3%	-19.7%	-61.8%
<b>Community</b>	<b>16.820</b>	<b>43.7%</b>	<b>5.6%</b>	<b>-30.9%</b>
College / University	12.515	-16.7%	-47.1%	-39.8%
Elementary / Pre School	12.840	-11.3%	-5.6%	-30.1%
Jr / Sr High School	16.595	9.4%	2.2%	-29.3%
Special / Vocational	0.876	-13.8%	-9.6%	-56.0%
<b>Educational</b>	<b>42.827</b>	<b>-6.3%</b>	<b>-14.4%</b>	<b>-32.3%</b>
Courthouses	2.079	146.8%	-76.4%	-62.2%
Fire and Police Stations	1.624	10.4%	3.5%	-6.6%
Government Offices	6.470	-19.2%	-29.9%	13.3%
Prisons	1.626	35.0%	25.8%	-22.6%
<b>Government</b>	<b>11.799</b>	<b>2.4%</b>	<b>-27.1%</b>	<b>-1.2%</b>
Industrial Labs / Labs / School Labs	1.181	-64.0%	111.1%	-0.3%
Manufacturing	10.708	-27.2%	-27.6%	-29.1%
Warehouses	10.029	32.2%	31.0%	61.7%
<b>Industrial</b>	<b>21.918</b>	<b>-14.3%</b>	<b>10.9%</b>	<b>16.3%</b>
Hospitals / Clinics	11.138	-21.3%	-70.3%	-37.2%
Medical Misc.	5.575	42.4%	-19.0%	-20.0%
Nursing Homes	5.342	-5.1%	21.9%	-21.0%
<b>Medical</b>	<b>22.055</b>	<b>-7.0%</b>	<b>-42.4%</b>	<b>-26.8%</b>
<b>Military</b>	<b>2.567</b>	<b>12.8%</b>	<b>-16.7%</b>	<b>32.5%</b>
Hotels	18.120	53.7%	-48.8%	-42.0%
Retail Misc.	3.905	-22.6%	-24.0%	17.5%
Shopping	10.924	-54.7%	-32.0%	-25.5%
<b>Retail</b>	<b>32.949</b>	<b>-19.6%</b>	<b>-38.6%</b>	<b>-28.1%</b>
<b>NON-RESIDENTIAL BUILDING</b>	<b>171.377</b>	<b>-7.2%</b>	<b>-23.8%</b>	<b>-22.9%</b>
Multi-Family	59.538	13.5%	-28.1%	-49.8%
Single-Family	116.565	5.8%	6.9%	-4.9%
<b>RESIDENTIAL</b>	<b>176.103</b>	<b>8.3%</b>	<b>-4.3%</b>	<b>-21.8%</b>
<b>NON-RESIDENTIAL</b>	<b>258.839</b>	<b>0.5%</b>	<b>-17.6%</b>	<b>-13.8%</b>
<b>GRAND TOTAL</b>	<b>434.942</b>	<b>3.5%</b>	<b>-12.3%</b>	<b>-17.5%</b>

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.

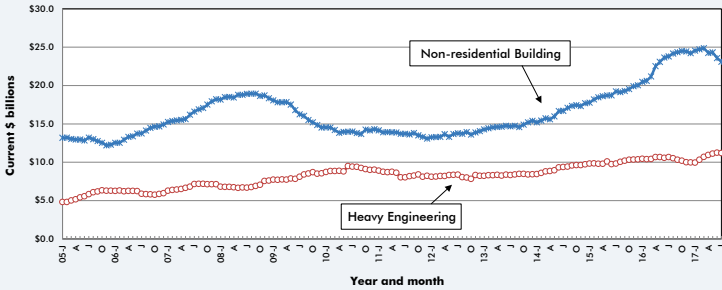
**TABLE 3: ConstructConnect's TOP 10 PROJECT STARTS IN JULY 2017**

LOCATION (EAST TO WEST)	TYPE OF CONSTRUCTION	DESCRIPTION	SQUARE FEET 000S*	DOLLARS 000,000S
<b>Connecticut</b> Hartford	Commercial	State Office Building Renovation and New Parking Garage (2 structures) 165 Capital Ave State of Connecticut - Department of Administrative Services	350	\$205
<b>New Jersey</b> Kearny	Engineering/Civil	Route 7 Hackensack River Wittpenn Bridge Contract 4 (4 structures) Route 7 New Jersey Department of Transportation (NJDOT)	*	\$195
<b>North Carolina</b> Charlotte	Commercial	Riverboat - Division 10 (1 structure; 30 stories) 620 South Tyrone Lincoln Harris - Charlotte	1,008	\$210
<b>Florida</b> Jacksonville	Industrial	UPS - Jacksonville Expansion (1 structure) 4420 Imeson Rd UPS - Corporate HQ	260	\$196
Miami	Institutional	Christine E. Lynn Rehabilitation Center for The Miami Project to Cure Paralysis - Jackson Memorial Hospital (1 structure) 1611 NW 12th Ave Jackson Memorial Hospital	225	\$173
<b>Tennessee</b> Charleston	Industrial	Wacker Pyrogenic Silica Production Plant / Charleston (1 structure) 553 McBryant Rd NW Wacker Polysilicon North America LLC	1,046	\$150
<b>Iowa</b> Bettendorf	Engineering/Civil	Bridge Replacement - Steel Girder I-74 Approaches to Arch Bridge over Mississippi River (4 structures) I-74 Iowa Department of Transportation (DOT)	*	\$322
<b>Texas</b> Arlington	Industrial	United Parcel Service Package Operations Facility / Arlington (2 structures) Bardin Rd and SH 360 UPS - Corporate HQ	1,200	\$200
<b>California</b> Sacramento	Engineering/Civil	Mather Dam Improvement Project (1 structure) Multiple Locations Sacramento Co-Water Resources Dept	*	\$188
Milpitas	Residential	Capitol Avenue Mixed-Use (2 structures; 5 stories; 582 units) 730-750 E Capitol Ave Architects Orange (Owner's Rep)	1,343	\$175
<b>TOTALS:</b>			<b>5,432</b>	<b>\$2,014</b>

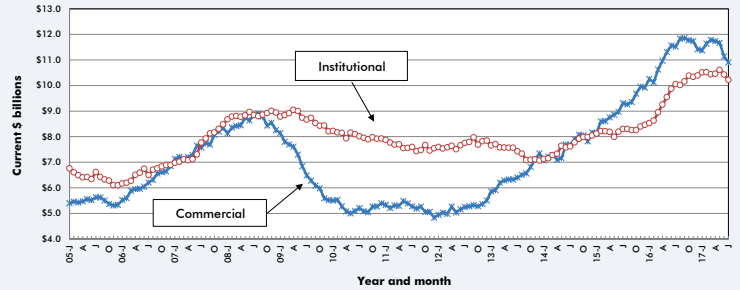
\*A square footage measure does not apply for alteration and most engineering/civil work.

Source: ConstructConnect/Table: ConstructConnect.

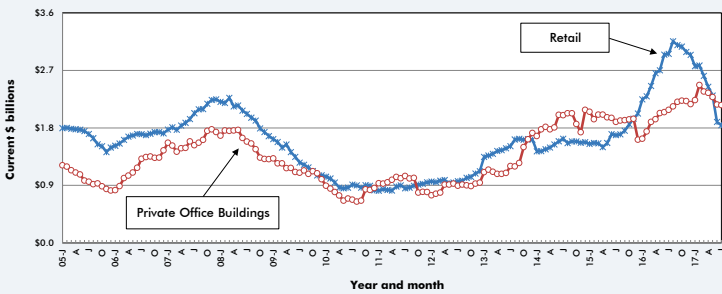
**GRAPH 1: U.S. NON-RESIDENTIAL CONSTRUCTION STARTS — ConstructConnect™ (12-MONTH MOVING AVERAGES)**



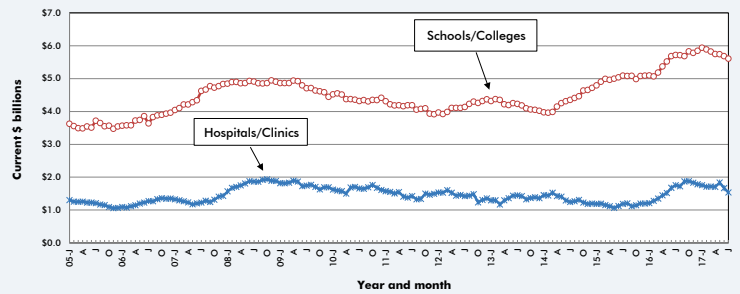
**GRAPH 2: U.S. COMMERCIAL AND INSTITUTIONAL CONSTRUCTION STARTS — ConstructConnect™ (12-MONTH MOVING AVERAGES)**



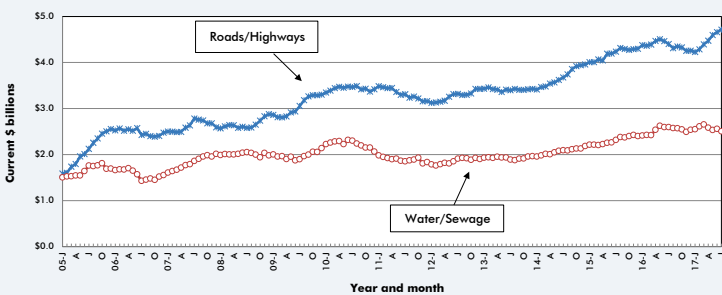
**GRAPH 3: U.S. RETAIL AND PRIVATE OFFICE BUILDING CONSTRUCTION STARTS — ConstructConnect™ (12-MONTH MOVING AVERAGES)**



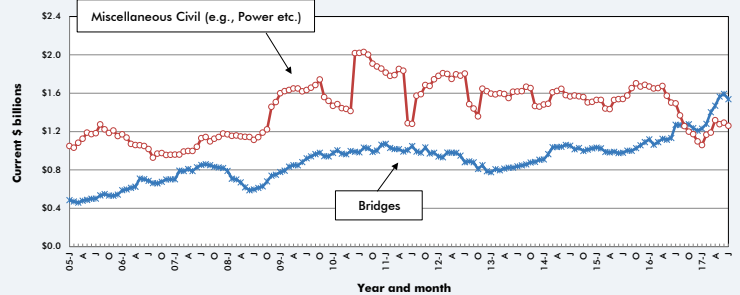
**GRAPH 4: U.S. HOSPITAL/CLINIC AND SCHOOL/COLLEGE CONSTRUCTION STARTS — ConstructConnect™ (12-MONTH MOVING AVERAGES)**



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



**GRAPH 6: U.S. BRIDGES AND MISCELLANEOUS CIVIL CONSTRUCTION STARTS — ConstructConnect™ (12-MONTH MOVING AVERAGES)**



Source: ConstructConnect/Charts: ConstructConnect.

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

	Jan-Jul 2016	Jan-Jul 2017	% Change
Connecticut	\$1,872,279,335	\$3,617,923,474	93.2%
Maine	\$718,661,235	\$709,588,670	-1.3%
Massachusetts	\$6,249,654,537	\$5,968,843,084	-4.5%
New Hampshire	\$914,185,488	\$684,334,064	-25.1%
Rhode Island	\$452,661,779	\$662,987,695	46.5%
Vermont	\$542,965,652	\$440,211,712	-18.9%
<b>Total New England</b>	<b>\$10,750,408,026</b>	<b>\$12,083,888,699</b>	<b>12.4%</b>
New Jersey	\$6,806,290,053	\$6,499,451,632	-4.5%
New York	\$14,711,156,982	\$20,668,687,199	40.5%
Pennsylvania	\$8,612,909,418	\$9,249,568,116	7.4%
<b>Total Middle Atlantic</b>	<b>\$30,130,356,453</b>	<b>\$36,417,706,947</b>	<b>20.9%</b>
<b>TOTAL NORTHEAST</b>	<b>\$40,880,764,479</b>	<b>\$48,501,595,646</b>	<b>18.6%</b>
Illinois	\$7,714,029,487	\$8,742,528,726	13.3%
Indiana	\$3,963,314,331	\$4,133,764,756	4.3%
Michigan	\$6,211,977,579	\$6,704,170,913	7.9%
Ohio	\$7,733,592,017	\$7,625,470,044	-1.4%
Wisconsin	\$5,317,727,996	\$5,663,574,241	6.5%
<b>Total East North Central</b>	<b>\$30,940,641,410</b>	<b>\$32,869,508,680</b>	<b>6.2%</b>
Iowa	\$3,377,473,985	\$3,019,555,805	-10.6%
Kansas	\$2,525,630,161	\$1,826,002,485	-27.7%
Minnesota	\$5,318,558,492	\$5,084,287,189	-4.4%
Missouri	\$4,874,499,027	\$4,529,964,177	-7.1%
Nebraska	\$1,951,011,316	\$2,362,297,738	21.1%
North Dakota	\$1,595,650,788	\$1,132,122,419	-29.0%
South Dakota	\$970,305,098	\$964,863,467	-0.6%
<b>Total West North Central</b>	<b>\$20,613,128,867</b>	<b>\$18,919,093,280</b>	<b>-8.2%</b>
<b>TOTAL MIDWEST</b>	<b>\$51,553,770,277</b>	<b>\$51,788,601,960</b>	<b>0.5%</b>
Delaware	\$656,602,958	\$960,451,078	46.3%
District of Columbia	\$1,559,821,860	\$1,641,424,454	5.2%
Florida	\$13,989,125,892	\$17,880,150,817	27.8%
Georgia	\$8,273,472,063	\$6,781,997,267	-18.0%
Maryland	\$7,067,160,522	\$3,838,156,630	-45.7%
North Carolina	\$8,783,109,508	\$7,365,061,617	-16.1%
South Carolina	\$4,045,631,823	\$4,859,011,877	20.1%
Virginia	\$6,147,778,004	\$6,684,075,381	8.7%
West Virginia	\$575,382,941	\$704,442,784	22.4%
<b>Total South Atlantic</b>	<b>\$51,098,085,571</b>	<b>\$50,714,771,905</b>	<b>-0.8%</b>
Alabama	\$2,852,647,510	\$2,842,778,016	-0.3%
Kentucky	\$4,506,656,151	\$2,141,130,480	-52.5%
Mississippi	\$1,831,332,492	\$1,490,268,402	-18.6%
Tennessee	\$5,135,301,620	\$3,556,874,618	-30.7%
<b>Total East South Central</b>	<b>\$14,325,937,773</b>	<b>\$10,031,051,516</b>	<b>-30.0%</b>
Arkansas	\$1,579,591,069	\$1,604,134,076	1.6%
Louisiana	\$5,565,394,291	\$3,716,095,336	-33.2%
Oklahoma	\$3,091,218,243	\$3,979,313,477	28.7%
Texas	\$32,346,761,816	\$27,440,339,113	-15.2%
<b>Total West South Central</b>	<b>\$42,582,965,419</b>	<b>\$36,739,882,002</b>	<b>-13.7%</b>
<b>TOTAL SOUTH</b>	<b>\$108,006,988,763</b>	<b>\$97,485,705,423</b>	<b>-9.7%</b>
Arizona	\$4,239,899,967	\$3,994,068,598	-5.8%
Colorado	\$4,183,594,922	\$3,993,594,780	-4.5%
Idaho	\$935,648,801	\$860,407,662	-8.0%
Montana	\$762,561,475	\$640,785,527	-16.0%
Nevada	\$2,808,324,616	\$1,960,241,200	-30.2%
New Mexico	\$937,167,412	\$1,217,627,732	29.9%
Utah	\$3,867,262,997	\$3,746,289,627	-3.1%
Wyoming	\$1,075,515,694	\$715,033,475	-33.5%
<b>Total Mountain</b>	<b>\$18,809,975,884</b>	<b>\$17,128,048,601</b>	<b>-8.9%</b>
Alaska	\$1,063,259,843	\$1,224,415,382	15.2%
California	\$25,395,092,214	\$31,409,789,856	23.7%
Hawaii	\$1,993,331,851	\$1,061,330,937	-46.8%
Oregon	\$3,455,929,213	\$3,755,731,069	8.7%
Washington	\$6,507,844,869	\$6,483,529,741	-0.4%
<b>Total Pacific</b>	<b>\$38,415,457,990</b>	<b>\$43,934,796,985</b>	<b>14.4%</b>
<b>TOTAL WEST</b>	<b>\$57,225,433,874</b>	<b>\$61,062,845,586</b>	<b>6.7%</b>
<b>TOTAL U.S.</b>	<b>\$257,666,957,393</b>	<b>\$258,838,748,615</b>	<b>0.5%</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 — JULY 2017 — ConstructConnect™**  
**BILLIONS OF CURRENT \$\$, NOT SEASONALLY ADJUSTED (NSA)**

	Latest month actuals			Moving averages (placed in end month)						Year to Date	
	May 17	Jun 17	Jul 17	May 17	3-months Jun 17	Jul 17	May 17	12-months Jun 17	Jul 17	Jan-Jul 2016	Jan-Jul 2017
Single Family	17.895	19.169	18.223	17.402	18.336	18.429	15.876	15.994	16.092	110.222	116.565
month-over-month % change	-0.3%	7.1%	-4.9%	7.8%	5.4%	0.5%	0.6%	0.7%	0.6%	8.7%	5.8%
year-over-year % change	7.1%	8.0%	6.9%	6.4%	6.2%	7.3%	5.2%	5.5%	6.1%		
Apartment	6.619	11.545	5.798	8.664	9.000	7.987	7.717	7.717	8.024	7.835	52.440
month-over-month % change	-25.1%	74.4%	-49.8%	-5.5%	3.9%	-11.3%	-1.0%	4.0%	-2.4%		
year-over-year % change	-12.5%	46.9%	-28.1%	13.1%	10.8%	2.0%	18.5%	19.6%	14.2%	45.8%	13.5%
<b>TOTAL RESIDENTIAL</b>	24.514	30.714	24.020	26.066	27.336	26.416	23.593	24.018	23.927	162.663	176.103
month-over-month % change	-8.5%	25.3%	-21.8%	3.0%	4.9%	-3.4%	0.1%	1.8%	-0.4%		
year-over-year % change	1.0%	19.9%	-4.3%	8.6%	7.7%	5.7%	9.2%	9.8%	8.6%	18.4%	8.3%
Hotel/Motel	1.825	2.227	1.291	3.461	2.429	1.781	2.263	2.317	2.214	11.788	18.120
month-over-month % change	-43.6%	22.0%	-42.0%	-7.8%	-29.8%	-26.7%	0.4%	2.4%	-4.4%		
year-over-year % change	6.8%	40.6%	-48.8%	96.6%	36.1%	-8.1%	50.2%	50.5%	32.7%	76.6%	53.7%
Retail/Shopping	1.483	1.724	1.285	1.489	1.589	1.497	2.307	1.892	1.841	24.134	10.924
month-over-month % change	-4.9%	16.3%	-25.5%	-9.4%	6.7%	-5.7%	-4.1%	0.3%	-2.7%		
year-over-year % change	-52.2%	-74.3%	-32.0%	-55.7%	-64.6%	-61.6%	-14.6%	-35.8%	-37.8%	86.8%	-54.7%
Parking Garages	0.354	0.068	0.099	0.380	0.319	0.174	0.310	0.277	0.239	3.151	1.472
month-over-month % change	-33.9%	-80.9%	47.3%	36.2%	-16.1%	-45.6%	-10.1%	-10.6%	-13.8%		
year-over-year % change	-54.2%	-85.4%	-82.2%	-41.0%	-58.0%	-71.0%	-15.4%	-27.7%	-25.6%	23.7%	-53.3%
Amusement	0.673	0.667	0.575	0.617	0.650	0.638	0.564	0.578	0.569	3.736	4.098
month-over-month % change	10.3%	-0.9%	-13.7%	6.3%	5.3%	-1.8%	2.0%	2.5%	-1.5%		
year-over-year % change	24.4%	33.8%	-15.7%	11.8%	21.3%	11.3%	-4.1%	13.4%	4.1%	-60.5%	9.7%
Office	1.172	1.893	1.375	1.732	1.575	1.480	2.282	2.167	2.154	16.538	16.362
month-over-month % change	-29.3%	61.5%	-27.4%	-44.1%	-9.1%	-6.0%	-2.8%	-5.0%	-0.5%		
year-over-year % change	-40.0%	-42.2%	-8.4%	-30.4%	-34.0%	-34.0%	12.4%	5.9%	3.6%	51.3%	-1.1%
Governmental Offices	0.855	0.996	1.129	0.970	0.931	0.993	1.017	1.004	0.964	8.004	6.470
month-over-month % change	-9.1%	16.6%	13.3%	13.8%	-4.1%	6.8%	-0.6%	-1.2%	-4.0%		
year-over-year % change	-8.1%	-13.1%	-29.9%	-12.9%	-12.1%	-19.2%	1.9%	-2.1%	-5.9%	28.5%	-19.2%
Laboratories	0.327	0.175	0.174	0.184	0.196	0.225	0.143	0.144	0.152	3.278	1.181
month-over-month % change	282.4%	-46.6%	-23.5%	163.8%	91.9%	72.4%	-4.3%	8.5%	9.6%		
year-over-year % change	-22.5%	8.2%	111.1%	-78.5%	-14.5%	1.5%	-58.3%	-58.8%	-56.5%	130.5%	-64.0%
Warehouse	1.146	0.826	1.335	1.617	1.164	1.102	1.424	1.409	1.436	7.586	10.029
month-over-month % change	-24.6%	-27.9%	61.7%	-9.4%	-28.0%	-5.3%	-2.7%	-1.0%	1.9%		
year-over-year % change	-29.1%	-17.8%	31.0%	29.4%	-5.1%	-9.2%	-3.2%	-2.7%	9.8%	6.4%	32.2%
Misc Commercial	3.445	1.055	0.552	2.757	2.188	1.684	1.361	1.354	1.336	8.553	11.957
month-over-month % change	67.0%	-69.4%	-47.7%	51.6%	-20.6%	-23.0%	17.4%	-0.5%	-1.3%		
year-over-year % change	235.6%	-7.4%	-27.8%	163.8%	91.9%	72.4%	-4.3%	8.5%	9.6%	-16.7%	39.8%
<b>TOTAL COMMERCIAL</b>	11.280	9.631	7.817	13.207	11.040	9.574	11.672	11.142	10.930	86.766	80.612
month-over-month % change	-7.6%	-14.6%	-18.8%	-5.3%	-16.4%	-13.3%	-0.6%	-4.5%	-2.1%		
year-over-year % change	-6.6%	-39.7%	-26.5%	1.0%	-18.9%	-25.7%	3.2%	-3.6%	-2.5%	22.4%	-7.1%
<b>TOTAL INDUSTRIAL (Manufacturing)</b>	1.044	0.761	0.539	1.567	0.904	0.781	1.376	1.368	1.351	14.702	10.708
month-over-month % change	15.3%	-27.1%	-29.1%	5.1%	-42.4%	-13.5%	-1.0%	-0.6%	-1.3%		
year-over-year % change	-13.2%	-11.7%	-27.6%	-56.3%	-73.3%	-16.6%	-18.0%	-16.4%	-16.0%	40.7%	-27.2%
Religious	0.187	0.253	0.187	0.198	0.249	0.209	0.160	0.167	0.172	1.018	1.339
month-over-month % change	-38.9%	35.2%	-28.0%	8.7%	25.5%	-16.0%	-0.2%	4.7%	2.8%		
year-over-year % change	-2.4%	54.4%	42.3%	37.1%	49.6%	28.8%	7.2%	20.0%	23.5%	-2.8%	31.5%
Hospitals/Clinics	3.074	1.101	0.691	2.266	1.962	1.622	1.836	1.671	1.534	14.157	11.138
month-over-month % change	79.7%	-64.2%	-37.2%	39.2%	-13.4%	-17.3%	7.6%	-9.0%	-8.2%		
year-over-year % change	103.5%	-64.3%	-70.3%	27.7%	-8.7%	-29.7%	20.7%	-0.3%	-12.8%	89.9%	-21.3%
Nursing/Assisted Living	0.839	1.185	0.936	0.803	0.989	0.987	0.727	0.773	0.787	5.630	5.342
month-over-month % change	-11.1%	41.3%	-21.0%	17.8%	23.1%	-0.3%	-2.3%	6.3%	1.8%		
year-over-year % change	-19.8%	85.6%	21.5%	-4.3%	15.7%	20.7%	12.2%	16.1%	12.2%	95.6%	-5.1%
Libraries/Museums	0.162	0.376	0.368	0.271	0.268	0.302	0.271	0.253	0.269	2.016	2.036
month-over-month % change	-38.9%	131.9%	-2.2%	12.1%	-8.3%	12.8%	-4.8%	-6.6%	6.5%		
year-over-year % change	-50.0%	-36.3%	117.0%	-9.9%	-29.4%	-16.4%	-2.3%	-17.8%	-13.7%	58.1%	1.0%
Fire/Police/Courthouse/Prison	0.629	0.626	0.474	0.623	0.711	0.576	0.666	0.660	0.651	3.518	5.329
month-over-month % change	-28.4%	-0.4%	-24.4%	-31.0%	14.2%	-19.0%	-0.3%	-0.8%	-1.5%		
year-over-year % change	-3.3%	-9.1%	-19.6%	10.6%	22.9%	-10.3%	29.1%	26.7%	34.8%	-7.5%	51.5%
Military	0.664	0.458	0.606	0.360	0.461	0.576	0.417	0.424	0.414	2.276	2.567
month-over-month % change	153.5%	-31.1%	32.5%	112.2%	28.3%	24.9%	8.8%	1.8%	-2.4%		
year-over-year % change	156.2%	24.6%	-31.6%	89.2%	95.2%	27.6%	-14.1%	-5.5%	-17.6%	-2.3%	12.8%
Schools/Colleges	7.980	8.291	5.613	6.792	7.739	7.295	5.741	5.683	5.605	45.684	42.827
month-over-month % change	14.9%	3.9%	-32.3%	29.4%	13.9%	-5.7%	-0.1%	-1.0%	-1.4%		
year-over-year % change	-1.0%	-7.7%	-14.4%	-7.8%	-6.6%	-7.3%	4.0%	0.0%	-1.9%	19.7%	-6.3%
Misc Medical	0.835	0.670	0.535	0.806	0.765	0.630	0.795	0.800	0.790	3.916	5.575
month-over-month % change	5.6%	-19.8%	-20.0%	-12.0%	-5.1%	-11.1%	3.6%	0.6%	-1.3%		
year-over-year % change	64.9%	9.6%	-19.0%	41.1%	-19.0%	10.7%	85.2%	83.6%	66.0%	77.6%	42.4%
<b>TOTAL INSTITUTIONAL</b>	14.371	12.959	9.411	21.140	13.144	12.247	10.612	10.432	10.222	78.215	76.152
month-over-month % change	18.7%	-9.8%	-27.4%	12.1%	8.3%	-6.8%	1.4%	-1.7%	-2.0%		
year-over-year % change	14.5%	-14.3%	-21.1%	3.1%	-0.1%	-7.2%	11.2%	5.6%	1.6%	32.2%	-7.6%
Misc Non Residential	0.603	0.578	0.680	0.607	0.623	0.620	0.660	0.644	0.626	5.047	3.905
month-over-month % change	-12.3%	-4.0%	17.5%	11.1%	2.6%	-0.4%	-2.1%	-2.4%	-2.8%		
year-over-year % change	-21.8%	-24.7%	-24.0%	-18.1%	-14.9%	-23.5%	20.2%	12.0%	1.9%	97.5%	-22.6%
<b>TOTAL NON-RES BUILDING</b>	27.297	23.929	18.447	27.521	25.710	23.224	24.320	23.586	23.106	184.730	171.377
month-over-month % change	5.4%	-12.3%	-22.9%	6.0%	6.7%	-9.7%	0.2%	-3.0%	-2.0%		
year-over-year % change	2.6%	-26.9%	-23.8%	5.7%	-16.7%	-16.6%	5.4%	-0.3%	-2.9%	32.2%	-7.2%
Airports	0.753	0.430	0.717	0.774	0.545	0.634	0.805	0.805	0.804	2.534	5.519
month-over-month % change	66.7%	-42.8%	66.6%	-31.5%	-29.5%	16.2%	5.0%	0.1%	-0.2%		
year-over-year % change	153.8%	2.1%	-3.0%	333.7%	102.0%	30.4%	85.9%	83.3%	68.6%	91.8%	117.8%
Roads/Highways	7.781	5.797	5.493	6.096	6.388	6.357	4.598	4.663	4.717	31.705	37.191
month-over-month % change	39.3%	-25.5%	-5.2%	29.3%	4.8%	-0.5%	2.8%	1.4%	1.2%		
year-over-year % change	24.0%	15.4%	13.8%	25.6%	20.1%	18.2%	2.0%	4.4%	7.1%	4.0%	17.3%
Bridges	2.157	1.419	1.882	2.454	1.921	1.819	1.564	1.594	1.537	9.648	13.590
month-over-month % change	-1.4%	-34.2%	32.7%	12.0%	-21.7%	-5.3%	6.4%	1.9%	-3.6%		
year-over-year % change	109.4%	33.3%	-26.6%	85.9%	67.2%	17.2%	40.2%	40.7%	21.1%	28.7%	40.9%
Dams/Marine	0.530	0.245	0.667	0.465	0.458	0.480	0.353	0.336	0.360	2.186	2.761
month-over-month % change	-11.5%	-53.8%	172.5%	37.9%	-1.7%	5.0%	4.1%	-4.8%	6.9%		
year-over-year % change	46.7%	-45.4%	71.9%	56.5%	14.0%	20.4%	-15.2%	-22.2%	-16.9%	-32.9%	26.3%
Water/Sewage	3.056	2.908	2.396	2.663	2.921	2.787	2.533	2.558	2.504	18.370	17.956
month-over-month % change	9.1%	-4.8%	-17.6%	6.6%	9.7%	-4.6%	-2.1%	1.0%	-2.1%		
year-over-year % change	-17.3%	11.7%	-21.3%	-10.8%	-11.5%	-10.5%	-3.8%	-1.3%	-3.6%	14.7%	-2.3%
Misc Civil (Power, etc.)	0.866	0.972	1.165	1.839	1.601	1.001	1.277	1.293	1.260	8.494	10.444
month-over-month % change	-70.8%	12.2%	19.8%	-17.3%	-13.0%	-37.5%	-3.1%	1.2%	-2.5%		
year-over-year % change	-36.4%	24.5%	-25.0%	31.4%	35.2%	-18.8%	-18.8%	-13.9%	-15.6%	-21.5%	23.0%
<b>TOTAL ENGINEERING (Civil)</b>	15.143	11.771	12.320	14.292	13.834	13.078	11.130	11.249	11.182	72.937	87.461
month-over-month % change	3.8%	-22.3%	4.7%	9.5%	-3.2%	-					