

# Construction Industry Snapshot

Issued: January 2019  
(based on December 2018 Starts Stats)

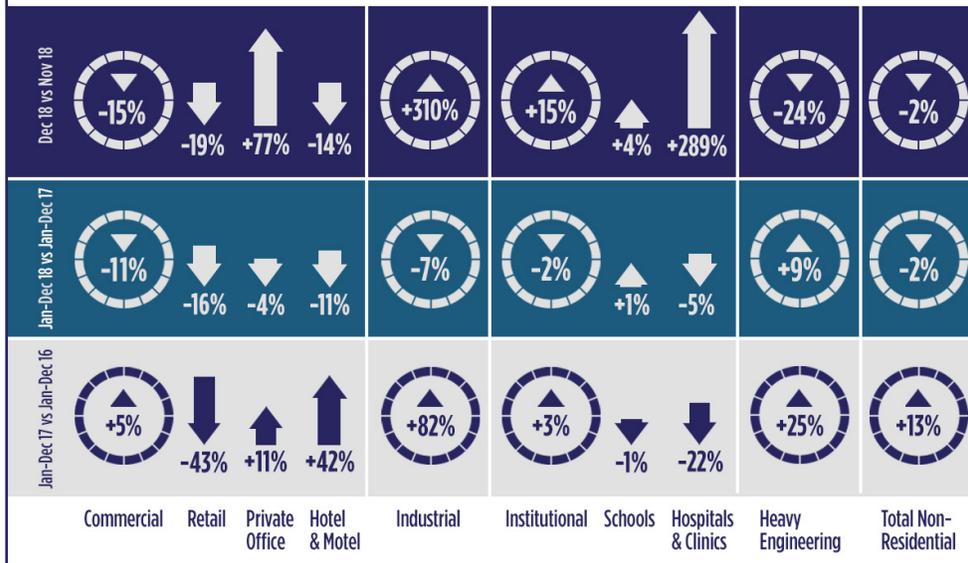


Marketing Analytics Team

## Nonresidential Construction Starts Ended 2018 Almost Level with 2017

ConstructConnect announced today that December's volume of construction starts, excluding residential work, was \$28.6 billion, a minor pullback of -1.7% compared with the level achieved in the preceding month of November.

Full-year 2018 nonresidential starts versus full-year 2017 were -2.0%.



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## December’s Notable Points

- The slight dip of -1.7% month-to-month (m/m) in total nonresidential starts in December resulted from commercial (-15.2%) and engineering (-23.9%) downturns that weren't quite matched by an improvement in institutional (+14.9%) and a big jump in industrial (+310.4%).
- The December-2018-versus-December-2017 (y/y) rise in total nonresidential starts of +16.9% was based in the industrial (+510.3%), institutional (+38.7%) and heavy engineering/civil (+25.7%) type-of-structure categories. Commercial (-29.5%), however, fell into retreat.

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## Nonresidential Construction Starts Ended 2018 Almost Level with 2017

ConstructConnect announced today that December's volume of construction starts, excluding residential work, was \$28.6 billion, a minor pullback of -1.7% compared with the level achieved in the preceding month of November. The long-term history of change in starts volumes between November and December, due to seasonality (i.e., worsening weather conditions), has been -5.0%. Non-residential starts in December 2018 relative to December 2017 were +16.9%.

December 2018 versus the previous five-year average for December, - i.e., from 2013 through 2017, - was +1.6%. Full-year 2018 nonresidential starts versus full-year 2017 were -2.0%.

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 latest report, for October, was 59%; the latter's was 41%.

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 is usually one month ahead of the reporting period for the investment series. At present, however, that one-month gap has been extended due to an extraordinary circumstance. One fallout from the partial federal government shutdown has been an absence of Census Bureau workers to process the November put-in-place numbers. With respect to some other key data releases, the Bureau of Labor Statistics (BLS) is still managing to keep tabs on jobs growth, unemployment and inflation.

According to December's *Employment Situation* report from the BLS, the U.S. construction sector took on an additional 38,000 workers in the final month of 2018. The average monthly climb in 'hard hat' jobs in 2018 was +23,000, a gain of +12.0% compared with 2017's comparable figure of +21,000. The NSA unemployment rate in construction in 2018's final month was 5.1%, up somewhat from November's 3.9%, but better than December 2017's 5.9%.

On a percentage-change basis, U.S. construction sector employment in December was +4.0% year over year. The latest annual staffing changes in other pockets of the economy important to construction were: 'machinery and equipment rental', +9.2%; 'oil and gas extraction', +7.1%; 'architectural and engineering services', +3.0%; 'real estate firms', +2.5%; 'building material and supplies dealers', +0.4%; and 'cement and concrete product manufacturing', +0.2%.

The slight dip of -1.7% month-to-month (m/m) in total nonresidential starts in December resulted from commercial (-15.2%) and engineering (-23.9%) downturns that weren't quite matched by an improvement in institutional (+14.9%) and a big jump in industrial (+310.4%) (see Top 10 projects, page 4). Industrial can display a big swing depending on the timing of a mega project.

The December-2018-versus-December-2017 (y/y) rise in total nonresidential starts of +16.9% was based in the industrial (+510.3%), institutional (+38.7%) and heavy engineering/civil (+25.7%) type-of-structure categories. Commercial (-29.5%), however, fell into retreat.

The small easing (-2.0%) of full-year total nonresidential starts in 2018 versus full-year 2017 came about because commercial (-11.2%), industrial (-6.8%) and institutional (-2.4%) combined for a degree of decline that engineering (+8.8%) tried valiantly, but failed, to completely offset.

'Roads/highways' made up the largest portion of engineering's 2018 initiations (39%, up from 37% in 2017). Such street starts in December 2018 were -10.8% m/m, but +46.3% y/y and +19.7% ytd. 'Miscellaneous civil' was the next biggest slice of engineering in 2018 (19%, up from 17% in 2017) and, in December, it was also down m/m (-72.0%), but up y/y (+24.6%) and ytd (+19.6%). (In December, ytd was full-year 2018 versus full-year 2017.) The next most important player within civil, 'water/sewer', suffered a significant share decline in 2018 (to 18% from 21%). Its December starts numbers were +2.8% m/m and +20.2% y/y, but -6.9% ytd.

Within commercial starts in full-year 2018 versus full-year 2017, the slices taken by 'private offices' (22%, up from 19%) and 'warehouses' (16%, up from 14%) widened. In December, the percentage changes for the former were +76.9% m/m and +62.0% y/y, but -3.8% ytd; for the latter, they were -70.9% m/m, -59.2% y/y and -7.3% ytd. Two commercial sub-categories with slightly smaller bites in 2018 were 'hotels/motels' (20%, down from 21%) and 'retail/shopping' (13%, down from 14%). 'Hotels/motels' ended 2018 -10.9% ytd; 'retail/shopping', -15.8% ytd.

'School/college' groundbreakings were even more dominant within institutional starts in 2018 than in 2017 (a 56% share, up from 54%). Educational facility starts in December were +3.5% m/m, +29.3% y/y and +0.9% ytd. The addition of 'hospital/clinic', 'nursing/assisted living' and 'miscellaneous medical' starts to form an overall medical facility sub-category accounted for the next biggest chunk of institutional starts in 2018 (29%, but down from 31% in 2017). Such combined medical facility starts in December were +70.2% m/m and +52.4% y/y, but -8.0% ytd.

Page 5 sets out 12-month moving average trend graphs for many of the key type-of-structure sub-categories. 'Retail' is tapering off badly, as shopkeepers continue to replace bricks-and-mortar locations with web-based selling platforms. 'Miscellaneous civil' has also been diving

### TABLE 1: VALUE OF UNITED STATES CONSTRUCTION STARTS — DECEMBER 2018 (ConstructConnect®)

	Jan - Dec 18 (\$ billions)	% Change Jan-Dec 18 vs Jan-Dec 17	% Change Dec 18 vs Dec 17	% Change Dec 18 vs Nov 18
Hotel/Motel	25.524	-10.9%	12.9%	-13.8%
Retail/Shopping	16.835	-15.8%	-34.0%	-19.3%
Parking Garage	2.785	-20.7%	-40.6%	-13.8%
Amusement	8.214	4.6%	-32.2%	9.4%
Private Office	27.874	-3.8%	62.0%	76.9%
Government Office	10.833	2.5%	35.2%	-19.9%
Laboratory	3.066	2.4%	-29.2%	33.7%
Warehouse	19.983	-7.3%	-59.2%	-70.9%
Miscellaneous Commercial *	12.208	-36.9%	-89.9%	-59.3%
<b>COMMERCIAL (big subset)</b>	<b>127.322</b>	<b>-11.2%</b>	<b>-29.5%</b>	<b>-15.2%</b>
<b>INDUSTRIAL (Manufacturing)</b>	<b>34.263</b>	<b>-6.8%</b>	<b>510.3%</b>	<b>310.4%</b>
Religious	2.059	-8.3%	25.5%	22.8%
Hospital/Clinic	15.787	-5.1%	197.4%	288.5%
Nursing/Assisted Living	10.181	-14.5%	-24.6%	2.5%
Library/Museum	2.746	-23.3%	-5.6%	-40.6%
Fire/Police/Courthouse/Prison	8.124	-3.8%	39.0%	-7.6%
Military	5.571	16.6%	75.4%	-29.4%
School/College	70.063	0.9%	29.3%	3.5%
Miscellaneous Medical	10.337	-5.2%	-12.9%	-34.8%
<b>INSTITUTIONAL</b>	<b>124.868</b>	<b>-2.4%</b>	<b>38.7%</b>	<b>14.9%</b>
Miscellaneous Non-residential	6.981	-8.9%	-26.2%	-33.1%
<b>NONRESIDENTIAL BUILDING</b>	<b>293.434</b>	<b>-7.1%</b>	<b>13.3%</b>	<b>13.4%</b>
Airport	7.166	-42.9%	9.9%	-42.0%
Road/Highway	63.579	19.7%	46.3%	-10.8%
Bridge	23.955	16.2%	9.4%	-0.1%
Dam/Marine	6.874	35.1%	3.7%	-17.4%
Water/Sewage	29.836	-6.9%	20.2%	2.8%
Miscellaneous Civil (power, pipelines, etc.)	31.532	19.6%	24.6%	-72.0%
<b>HEAVY ENGINEERING (Civil)</b>	<b>162.942</b>	<b>8.8%</b>	<b>25.7%</b>	<b>-23.9%</b>
<b>TOTAL NONRESIDENTIAL</b>	<b>456.376</b>	<b>-2.0%</b>	<b>16.9%</b>	<b>-1.7%</b>

\* Includes transportation terminals and sports arenas.

Source: ConstructConnect Research Group/Table: ConstructConnect.

of late, but that's after skyrocketing higher in 2017 and first-half 2018. Its present lower perch is still well above historical norms. 'Roads' and 'bridges' are maintaining their upward treks.

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 December, the economy-wide compensation increases were all in a range of +3.0% to +3.5%. Including bosses (Table B-3), both average hourly and average weekly pay hikes were +3.2%. Excluding bosses (Table B-8), average hourly earnings were +3.3% and average weekly earnings, +3.0%. For construction workers alone (i.e., as a subset of all workers), the earnings advances in December lay between +3.9% y/y and +4.5% y/y. Including supervisory personnel, average hourly and weekly pay raises for on-site employees were +3.9%. Excluding supervisory personnel, construction paycheck flows were even frothier, at +4.2% hourly and +4.5% weekly.

Further on costing, November's results (y/y) for three key BLS Producer Price Index (PPI) series were: 'construction materials special index', +6.7%; 'inputs to new construction index, excluding capital investment, labor and imports', +4.9%; and 'final demand construction', +5.1%.

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 nonresidential 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.

ConstructConnect's single-family plus multi-family residential starts in December were -6.7% m/m; -7.3% y/y; and -9.5% ytd. 'Grand total' starts were -3.7% m/m; +6.3% y/y; and -5.0% ytd. ♦

Alex Carrick

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

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

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

	Jan - Dec 18 (\$ billions)	% Change Jan-Dec 18 vs Jan-Dec 17	% Change Dec 18 vs Dec 17	% Change Dec 18 vs Nov 18
<b>Summary</b>				
CIVIL	162.942	8.8%	25.7%	-23.9%
NONRESIDENTIAL BUILDING	293.434	-7.1%	13.3%	13.4%
RESIDENTIAL	287.727	-9.5%	-7.3%	-6.7%
<b>GRAND TOTAL</b>	<b>744.104</b>	<b>-5.0%</b>	<b>6.3%</b>	<b>-3.7%</b>
<b>Verticals</b>				
Airport	7.166	-42.9%	9.9%	-42.0%
All Other Civil	24.096	54.2%	27.8%	-78.8%
Bridges	23.955	16.2%	9.4%	-0.1%
Dams / Canals / Marine Work	6.874	35.1%	3.7%	-17.4%
Power Infrastructure	7.436	-30.7%	16.6%	103.9%
Roads	63.579	19.7%	46.3%	-10.8%
Water and Sewage Treatment	29.836	-6.9%	20.2%	2.8%
<b>CIVIL</b>	<b>162.942</b>	<b>8.8%</b>	<b>25.7%</b>	<b>-23.9%</b>
Offices (private)	27.874	-3.8%	62.0%	76.9%
Parking Garages	2.785	-20.7%	-40.6%	-13.8%
Transportation Terminals	5.207	35.6%	-68.3%	9.0%
<b>Commercial (small subset)</b>	<b>35.865</b>	<b>-1.3%</b>	<b>14.7%</b>	<b>51.6%</b>
Amusement	8.214	4.6%	-32.2%	9.4%
Libraries / Museums	2.746	-23.3%	-5.6%	-40.6%
Religious	2.059	-8.3%	25.5%	22.8%
Sports Arenas / Convention Centers	7.001	-54.8%	-93.2%	-72.0%
<b>Community</b>	<b>20.020</b>	<b>-31.4%</b>	<b>-68.8%</b>	<b>-28.0%</b>
College / University	18.824	-15.5%	46.2%	-21.8%
Elementary / Pre School	19.233	1.8%	10.2%	27.4%
Jr / Sr High School	30.287	14.1%	33.1%	19.6%
Special / Vocational	1.718	-1.8%	-27.6%	-29.6%
<b>Educational</b>	<b>70.063</b>	<b>0.9%</b>	<b>29.3%</b>	<b>3.5%</b>
Courthouses	1.833	-32.1%	27.0%	56.0%
Fire and Police Stations	3.048	6.7%	27.5%	-10.6%
Government Offices	10.833	2.5%	35.2%	-19.9%
Prisons	3.243	12.4%	96.1%	-47.0%
<b>Government</b>	<b>18.957</b>	<b>-0.3%</b>	<b>37.0%</b>	<b>-14.4%</b>
Industrial Labs / Labs / School Labs	3.066	2.4%	-29.2%	33.7%
Manufacturing	34.263	-6.8%	510.3%	310.4%
Warehouses	19.983	-7.3%	-59.2%	-70.9%
<b>Industrial</b>	<b>57.312</b>	<b>-6.5%</b>	<b>96.3%</b>	<b>52.4%</b>
Hospitals / Clinics	15.787	-5.1%	197.4%	288.5%
Medical Misc.	10.337	-5.2%	-12.9%	-34.8%
Nursing Homes	10.181	-14.5%	-24.6%	2.5%
<b>Medical</b>	<b>36.305</b>	<b>-8.0%</b>	<b>52.4%</b>	<b>70.2%</b>
<b>Military</b>	<b>5.571</b>	<b>16.6%</b>	<b>75.4%</b>	<b>-29.4%</b>
Hotels	25.524	-10.9%	12.9%	-13.8%
Retail Misc.	6.981	-8.9%	-26.2%	-33.1%
Shopping	16.835	-15.8%	-34.0%	-19.3%
<b>Retail</b>	<b>49.341</b>	<b>-12.4%</b>	<b>-11.2%</b>	<b>-18.3%</b>
<b>NONRESIDENTIAL BUILDING</b>	<b>293.434</b>	<b>-7.1%</b>	<b>13.3%</b>	<b>13.4%</b>
Multi-Family	86.532	-26.7%	-8.7%	-0.8%
Single-Family	201.195	0.6%	-6.6%	-9.3%
<b>RESIDENTIAL</b>	<b>287.727</b>	<b>-9.5%</b>	<b>-7.3%</b>	<b>-6.7%</b>
<b>NONRESIDENTIAL</b>	<b>456.376</b>	<b>-2.0%</b>	<b>16.9%</b>	<b>-1.7%</b>
<b>GRAND TOTAL</b>	<b>744.104</b>	<b>-5.0%</b>	<b>6.3%</b>	<b>-3.7%</b>

Table 1 conforms to the type-of-structure ordering adopted by many firms and organizations in the industry. Specifically, it breaks nonresidential building into ICI work (i.e., industrial, commercial and institutional), since each has its own set of economic and demographic drivers. Table 2 presents an alternative, perhaps more user-friendly and intuitive type-of-structure ordering that matches how the data appears in ConstructConnect's on-line product 'Insight'.

Source: ConstructConnect/Table: ConstructConnect.

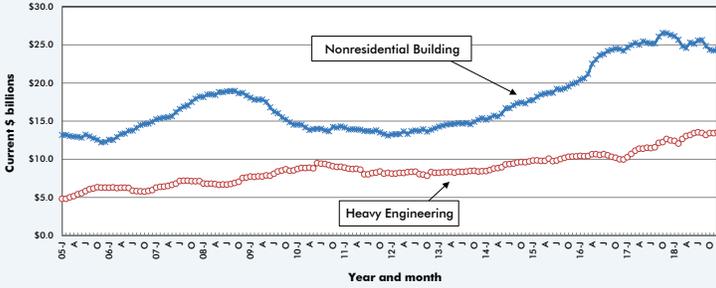
**TABLE 3: ConstructConnect's TOP 10 PROJECT STARTS IN DECEMBER 2018**

LOCATION (EAST TO WEST)	TYPE OF CONSTRUCTION	DESCRIPTION	SQUARE FEET 000S*	DOLLARS 000,000S
<b>Massachusetts</b> Boston	Engineering/Civil	Bridge Replacement Br. No. B-16-016 (Concrete) North Washington Street over the Boston Inner Harbor (4 structures) N Washington St Massachusetts Department of Transportation - Highway Division (DOT)	*	\$177
<b>Pennsylvania</b> Philadelphia	Institutional	College House West Residential Dorm/ The University of Pennsylvania (1 structure; 5 stories; 450 units) 40th St and Walnut St University of Pennsylvania - Design and Construction	250	\$163
<b>Virginia</b> Manassas	Industrial	Micron Technology Inc Manassas Plant Expansion "Clean Room" for microchip production (2 structures) 9600 Godwin Dr Micron Technology Inc / Manassas	100	\$3,000
Boydton	Commercial	Microsoft-BN09-13 (Data Center Expansion) (1 structure; 1 story) 101 Herbert Dr Microsoft Corp	450	\$347
<b>Florida</b> Boca Raton	Residential	Alina Residences Boca Raton (2 structures; 11 stories; 793 units) 210-398 SE Mizner Blvd ELAD National Properties	1,342	\$500
<b>Ohio</b> Cleveland	Institutional	MetroHealth Tower (3 structures; 12 stories; 270 beds) 2500 MetroHealth Dr Hammes Company	707	\$1,000
<b>Michigan</b> Detroit	Commercial	Monroe Block Mixed-Use - Block A / Detroit (5 structures; 50 stories) 118 Monroe Ave Rock Ventures LLC	988	\$830
Lansing	Institutional	McLaren Greater Lansing Regional Medical Center (1 structure; 240 beds) Collins Rd and US 127 McLaren Regional Medical Center Greater Lansing	500	\$450
<b>California</b> Los Angeles	Residential	The Grand - Parcel Q (6 structures; 59 stories; 2241 units) 100 S Grand Ave Related California	1,700	\$1,000
Redding	Institutional	Shasta County New Redding Courthouse Project (2 structures; 6 stories) 1500 Court St State of California - Office of Court Construction and Management	177	\$155
<b>TOTALS:</b>			<b>6,214</b>	<b>\$7,622</b>

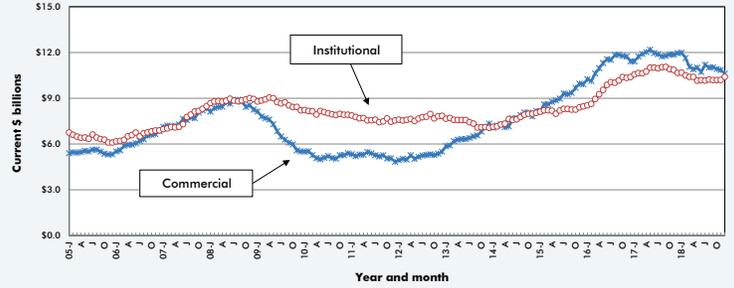
\*A square footage measure does not apply for alteration, some forms of industrial (e.g., petrochemical) and most engineering/civil work.

Source: ConstructConnect/Table: ConstructConnect.

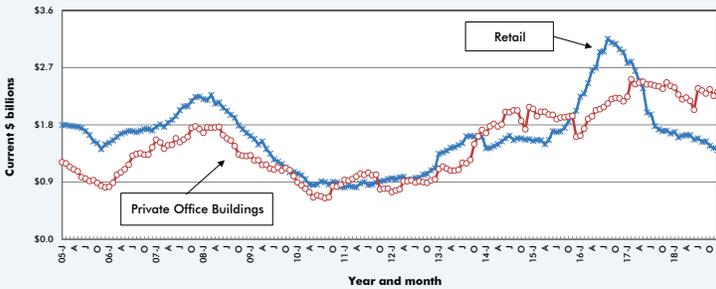
**GRAPH 1: U.S. NONRESIDENTIAL CONSTRUCTION STARTS — ConstructConnect® (12-MONTH MOVING AVERAGES)**



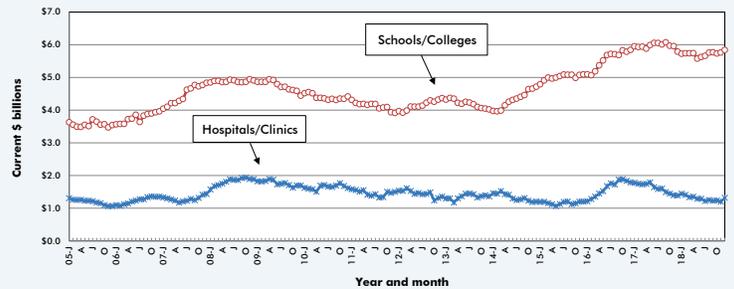
**GRAPH 2: U.S. COMMERCIAL AND INSTITUTIONAL CONSTRUCTION STARTS — ConstructConnect® (12-MONTH MOVING AVERAGES)**



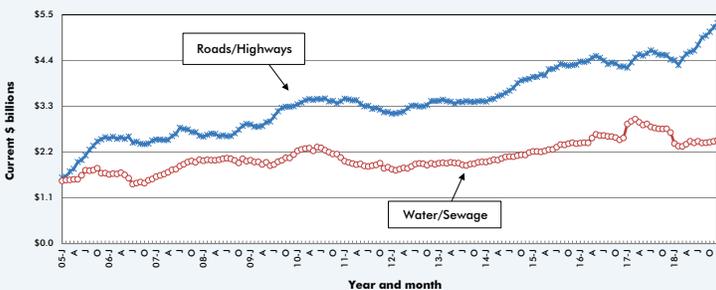
**GRAPH 3: U.S. RETAIL AND PRIVATE OFFICE BUILDING CONSTRUCTION STARTS — ConstructConnect® (12-MONTH MOVING AVERAGES)**



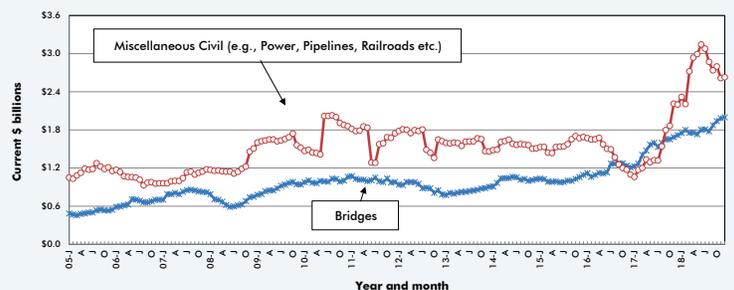
**GRAPH 4: U.S. HOSPITAL/CLINIC AND SCHOOL/COLLEGE CONSTRUCTION STARTS — ConstructConnect® (12-MONTH MOVING AVERAGES)**



**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)**



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

Source: ConstructConnect/Charts: ConstructConnect.

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

	Jan-Dec 2017	Jan-Dec 2018	% Change
Connecticut	\$5,135,560,001	\$3,700,102,931	-28.0%
Maine	\$1,648,950,487	\$2,051,230,061	24.4%
Massachusetts	\$10,230,114,661	\$9,715,649,212	-5.0%
New Hampshire	\$1,348,484,016	\$1,404,471,432	4.2%
Rhode Island	\$1,244,989,344	\$2,646,646,648	112.6%
Vermont	\$741,034,630	\$443,228,351	-40.2%
<b>Total New England</b>	<b>\$20,349,133,139</b>	<b>\$19,961,328,635</b>	<b>-1.9%</b>
New Jersey	\$9,674,408,184	\$7,870,968,568	-18.6%
New York	\$34,883,124,000	\$27,955,760,486	-19.9%
Pennsylvania	\$21,617,241,359	\$13,489,533,515	-37.6%
<b>Total Middle Atlantic</b>	<b>\$66,174,773,543</b>	<b>\$49,316,262,569</b>	<b>-25.5%</b>
<b>TOTAL NORTHEAST</b>	<b>\$86,523,906,682</b>	<b>\$69,277,591,204</b>	<b>-19.9%</b>
Illinois	\$13,094,365,358	\$12,656,831,762	-3.3%
Indiana	\$6,829,555,050	\$8,237,514,089	20.6%
Michigan	\$15,701,290,443	\$10,796,169,190	-31.2%
Ohio	\$14,533,790,619	\$15,935,327,356	9.6%
Wisconsin	\$9,890,263,383	\$19,531,427,745	97.5%
<b>Total East North Central</b>	<b>\$60,049,264,853</b>	<b>\$67,157,270,142</b>	<b>11.8%</b>
Iowa	\$5,310,165,332	\$4,924,365,990	-7.3%
Kansas	\$3,838,378,647	\$5,143,030,952	34.0%
Minnesota	\$9,056,011,008	\$8,241,651,940	-9.0%
Missouri	\$8,184,207,405	\$7,562,307,595	-7.6%
Nebraska	\$3,127,046,157	\$2,584,979,189	-17.3%
North Dakota	\$1,928,267,725	\$3,169,191,308	64.4%
South Dakota	\$2,275,666,955	\$1,537,375,215	-32.4%
<b>Total West North Central</b>	<b>\$33,719,743,229</b>	<b>\$33,162,902,189</b>	<b>-1.7%</b>
<b>TOTAL MIDWEST</b>	<b>\$93,769,008,082</b>	<b>\$100,320,172,331</b>	<b>7.0%</b>
Delaware	\$1,510,913,661	\$1,206,065,559	-20.2%
District of Columbia	\$2,471,008,245	\$3,241,990,845	31.2%
Florida	\$30,053,583,483	\$27,715,771,454	-7.8%
Georgia	\$12,446,268,586	\$11,602,149,629	-6.8%
Maryland	\$7,441,112,245	\$7,158,361,031	-3.8%
North Carolina	\$14,343,410,587	\$14,752,153,434	2.8%
South Carolina	\$7,920,527,637	\$6,117,411,400	-22.8%
Virginia	\$12,003,139,818	\$17,181,904,260	43.1%
West Virginia	\$1,591,348,152	\$7,361,541,142	362.6%
<b>Total South Atlantic</b>	<b>\$89,781,312,414</b>	<b>\$96,337,348,754</b>	<b>7.3%</b>
Alabama	\$5,522,205,098	\$5,599,650,867	1.4%
Kentucky	\$4,259,911,087	\$6,284,720,759	47.5%
Mississippi	\$2,647,946,340	\$2,266,842,810	-14.4%
Tennessee	\$7,657,531,674	\$8,452,544,604	10.4%
<b>Total East South Central</b>	<b>\$20,087,594,199</b>	<b>\$22,603,759,040</b>	<b>12.5%</b>
Arkansas	\$2,908,585,235	\$3,349,954,782	15.2%
Louisiana	\$5,999,849,449	\$4,839,105,034	-19.3%
Oklahoma	\$6,336,210,925	\$5,910,295,614	-6.7%
Texas	\$59,768,251,909	\$52,980,023,748	-11.4%
<b>Total West South Central</b>	<b>\$75,012,897,518</b>	<b>\$67,079,379,178</b>	<b>-10.6%</b>
<b>TOTAL SOUTH</b>	<b>\$184,881,804,131</b>	<b>\$186,020,486,972</b>	<b>0.6%</b>
Arizona	\$6,800,538,734	\$8,855,704,278	30.2%
Colorado	\$8,850,793,200	\$8,381,834,620	-5.3%
Idaho	\$1,468,091,005	\$1,966,929,055	34.0%
Montana	\$1,067,537,645	\$1,463,941,155	37.1%
Nevada	\$5,020,189,535	\$5,422,006,665	8.0%
New Mexico	\$1,983,466,515	\$2,116,447,640	6.7%
Utah	\$5,398,101,318	\$6,270,421,088	16.2%
Wyoming	\$1,099,712,439	\$1,168,897,863	6.3%
<b>Total Mountain</b>	<b>\$31,688,430,391</b>	<b>\$35,646,182,364</b>	<b>12.5%</b>
Alaska	\$1,681,946,597	\$1,558,762,035	-7.3%
California	\$48,322,432,808	\$42,874,313,539	-11.3%
Hawaii	\$2,011,570,774	\$2,299,362,360	14.3%
Oregon	\$5,649,433,042	\$5,926,782,013	4.9%
Washington	\$11,015,392,733	\$12,452,445,632	13.0%
<b>Total Pacific</b>	<b>\$68,680,775,954</b>	<b>\$65,111,665,579</b>	<b>-5.2%</b>
<b>TOTAL WEST</b>	<b>\$100,369,206,345</b>	<b>\$100,757,847,943</b>	<b>0.4%</b>
<b>TOTAL U.S.</b>	<b>\$465,543,925,240</b>	<b>\$456,376,098,450</b>	<b>-2.0%</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 — DECEMBER 2018 — ConstructConnect®**  
**BILLIONS OF CURRENT \$\$, NOT SEASONALLY ADJUSTED (NSA)**

	Latest month actuals			Moving averages (placed in end month)						Year to Date	
	Oct 18	Nov 18	Dec 18	Oct 18	3-months Nov 18	Dec 18	Oct 18	12-months Nov 18	Dec 18	Jan-Dec 2017	Jan-Dec 2018
Single Family	16,497	13,356	12,110	17,071	15,514	13,987	17,059	16,837	16,766	199,943	201,195
month-over-month % change	-1.2%	-19.0%	-9.3%	-3.5%	-9.1%	-9.8%	-0.5%	-1.3%	-0.4%		
year-over-year % change	-5.5%	-16.6%	-6.6%	-2.1%	-7.2%	-9.6%	3.2%	1.1%	0.6%	7.1%	0.6%
Apartment	7,850	5,809	5,763	7,498	6,863	6,474	7,560	7,257	7,211	117,978	86,532
month-over-month % change	13.3%	-26.0%	-0.8%	2.8%	-8.5%	-5.7%	-2.6%	-4.0%	-0.6%		
year-over-year % change	-23.4%	-38.5%	-8.7%	-22.3%	-27.8%	-25.3%	-21.9%	-26.5%	-21.9%	35.7%	-26.7%
<b>TOTAL RESIDENTIAL</b>	<b>24,347</b>	<b>19,164</b>	<b>17,873</b>	<b>24,570</b>	<b>22,377</b>	<b>20,461</b>	<b>24,619</b>	<b>24,094</b>	<b>23,977</b>	<b>317,921</b>	<b>287,727</b>
month-over-month % change	3.1%	-21.3%	-6.7%	-1.6%	-8.9%	-8.6%	-1.1%	-2.1%	-0.5%		
year-over-year % change	-12.1%	-24.7%	-7.3%	-9.3%	-14.6%	-15.3%	-6.1%	-9.2%	-9.5%	16.2%	-9.5%
Hotel/Motel	2,183	1,755	1,514	1,984	2,046	1,817	2,122	2,113	2,127	28,645	25,524
month-over-month % change	-0.8%	-19.6%	-13.8%	10.4%	3.1%	-11.2%	-0.7%	-0.5%	0.7%		
year-over-year % change	-7.2%	-6.2%	12.9%	-12.8%	-7.1%	-2.0%	-10.6%	-11.7%	-10.9%	41.5%	-10.9%
Retail/Shopping	1,047	0,931	0,752	1,230	1,113	0,910	1,472	1,435	1,403	19,999	16,835
month-over-month % change	-23.0%	-11.1%	-19.3%	-15.5%	-9.5%	-18.2%	-4.4%	-2.5%	-2.2%		
year-over-year % change	-43.5%	-32.2%	-34.0%	-27.3%	-26.7%	-37.5%	-13.6%	-16.1%	-15.8%	-43.4%	-15.8%
Parking Garages	0,167	0,380	0,328	0,160	0,230	0,292	0,233	0,251	0,232	3,514	2,785
month-over-month % change	18.3%	127.2%	-13.8%	-11.3%	43.8%	27.1%	-11.3%	7.8%	-7.5%		
year-over-year % change	-68.1%	132.5%	-40.6%	-45.4%	-21.9%	-29.4%	-18.0%	-5.3%	-20.7%	-22.8%	-20.7%
Amusement	1,181	0,539	0,590	0,798	0,827	0,770	0,693	0,708	0,684	7,854	8,214
month-over-month % change	55.3%	-54.3%	9.4%	41.2%	3.6%	-6.9%	6.5%	2.1%	-3.3%		
year-over-year % change	76.1%	46.9%	-32.2%	28.7%	52.5%	21.1%	6.8%	14.0%	4.6%	21.4%	4.6%
Office	2,410	1,157	2,046	1,804	1,701	1,871	2,360	2,258	2,323	28,974	27,874
month-over-month % change	56.9%	-52.0%	76.9%	-36.6%	-5.7%	10.0%	2.9%	-4.3%	2.9%		
year-over-year % change	48.6%	-51.6%	62.0%	-3.1%	-16.2%	6.4%	-0.3%	-8.5%	-3.8%	11.2%	-3.8%
Governmental Offices	0,958	0,914	0,732	1,096	1,045	0,868	0,863	0,887	0,903	10,572	10,833
month-over-month % change	-24.2%	-4.6%	-20.3%	3.4%	-4.7%	-16.8%	1.7%	2.8%	1.8%		
year-over-year % change	22.8%	45.6%	35.2%	41.0%	46.8%	33.6%	-10.0%	-6.9%	2.5%	-19.3%	2.5%
Laboratories	0,203	0,175	0,234	0,255	0,242	0,204	0,263	0,264	0,255	2,994	3,066
month-over-month % change	-41.8%	-13.7%	33.7%	-33.7%	-5.2%	-15.7%	-0.7%	0.1%	-3.1%		
year-over-year % change	-10.0%	1.7%	-29.2%	52.5%	19.2%	-16.0%	12.3%	12.4%	2.4%	-23.6%	2.4%
Warehouse	1,620	1,698	0,493	1,756	1,789	1,271	1,694	1,725	1,665	21,567	19,983
month-over-month % change	-21.0%	4.8%	-70.9%	-8.6%	1.9%	-29.0%	-0.3%	1.8%	-3.5%		
year-over-year % change	-4.1%	28.1%	-59.2%	9.3%	10.3%	-9.8%	-5.1%	-3.3%	-7.3%	45.9%	-7.3%
Misc Commercial	0,423	0,654	0,266	0,542	0,639	0,516	1,217	1,214	1,017	19,332	12,208
month-over-month % change	-0.8%	4.0%	-59.3%	-47.7%	17.8%	-19.2%	-9.0%	-0.3%	-16.2%		
year-over-year % change	-69.6%	-5.5%	-89.9%	-51.4%	-44.3%	-71.2%	-19.8%	-15.7%	-36.9%	53.1%	-36.9%
<b>TOTAL COMMERCIAL</b>	<b>10,397</b>	<b>8,204</b>	<b>6,955</b>	<b>9,626</b>	<b>9,631</b>	<b>8,519</b>	<b>10,918</b>	<b>10,853</b>	<b>10,610</b>	<b>143,452</b>	<b>127,322</b>
month-over-month % change	1.0%	-21.1%	-15.2%	-14.4%	0.1%	-11.5%	-1.0%	-0.6%	-2.2%		
year-over-year % change	-11.8%	-8.7%	-29.5%	-10.4%	-6.2%	-16.6%	-8.1%	-8.5%	-11.2%	4.7%	-11.2%
<b>TOTAL INDUSTRIAL (Manufacturing)</b>	<b>2,575</b>	<b>0,825</b>	<b>3,385</b>	<b>3,097</b>	<b>1,828</b>	<b>2,261</b>	<b>2,653</b>	<b>2,619</b>	<b>2,855</b>	<b>36,748</b>	<b>34,263</b>
month-over-month % change	23.4%	-68.0%	310.4%	18.1%	-41.0%	23.7%	-13.1%	-1.3%	9.0%		
year-over-year % change	-65.1%	-32.6%	510.3%	-55.0%	-71.9%	-25.8%	-14.8%	-16.7%	-6.8%	81.9%	-6.8%
Religious	0,113	0,144	0,177	0,159	0,149	0,145	0,166	0,169	0,172	2,246	2,059
month-over-month % change	-39.4%	25.2%	22.8%	-2.1%	-6.1%	2.9%	-4.7%	1.6%	1.8%		
year-over-year % change	-46.4%	27.4%	25.5%	-6.9%	-2.6%	-6.9%	-12.8%	-10.4%	-8.3%	29.2%	-8.3%
Hospitals/Clinics	1,059	0,548	2,129	1,121	0,809	1,245	1,234	1,198	1,316	16,628	15,787
month-over-month % change	29.1%	-48.2%	288.5%	6.6%	-27.8%	53.9%	0.6%	-2.9%	9.8%		
year-over-year % change	9.3%	-44.1%	197.4%	6.7%	-20.6%	40.2%	-14.6%	-14.1%	-5.1%	-22.4%	-5.1%
Nursing/Assisted Living	1,082	0,657	0,673	0,821	0,836	0,804	0,910	0,867	0,848	11,906	10,181
month-over-month % change	40.7%	-39.3%	2.5%	17.1%	1.8%	-3.8%	0.4%	-4.7%	-2.1%		
year-over-year % change	4.6%	-43.9%	-24.6%	-13.2%	20.3%	-22.1%	-5.5%	-12.1%	-14.5%	22.4%	-14.5%
Libraries/Museums	0,389	0,254	0,151	0,279	0,304	0,244	0,221	0,236	0,229	3,582	2,746
month-over-month % change	43.7%	-34.7%	-40.6%	34.0%	8.9%	-13.1%	7.0%	4.0%	-0.3%		
year-over-year % change	81.1%	70.3%	-5.6%	-9.2%	33.9%	51.6%	-31.3%	-29.7%	-23.3%	11.5%	-23.3%
Fire/Police/Courthouse/Prison	1,034	0,747	0,690	0,770	0,725	0,824	0,637	0,661	0,677	8,441	8,124
month-over-month % change	161.1%	-27.7%	-7.6%	6.8%	-5.8%	13.5%	4.1%	3.8%	2.4%		
year-over-year % change	41.4%	62.6%	39.0%	12.8%	18.3%	46.5%	-9.0%	-5.7%	-3.8%	40.8%	-3.8%
Military	0,837	0,685	0,484	0,626	0,694	0,669	0,430	0,447	0,464	4,776	5,571
month-over-month % change	49.4%	-18.1%	-29.4%	33.0%	10.9%	-3.7%	2.1%	3.9%	3.9%		
year-over-year % change	14.2%	41.3%	75.4%	10.3%	9.9%	34.3%	7.8%	16.3%	16.3%	2.1%	16.6%
Schools/Colleges	4,388	4,062	4,203	5,055	4,357	4,218	5,731	5,759	5,839	69,453	70,063
month-over-month % change	-5.0%	-7.4%	3.5%	14.4%	-13.8%	-3.2%	-0.6%	0.5%	1.4%		
year-over-year % change	-8.9%	9.2%	29.3%	6.1%	0.2%	7.4%	-3.9%	-3.3%	0.9%	-10.9%	0.9%
Misc Medical	0,646	0,716	0,467	0,859	0,854	0,610	0,867	0,867	0,861	10,909	10,337
month-over-month % change	-46.1%	10.8%	-34.8%	-9.3%	-0.6%	-28.6%	-1.5%	0.1%	-0.7%		
year-over-year % change	-19.4%	0.8%	-12.9%	-17.7%	6.7%	-10.7%	-5.7%	-6.3%	-5.2%	39.5%	-5.2%
<b>TOTAL INSTITUTIONAL</b>	<b>9,549</b>	<b>7,813</b>	<b>8,974</b>	<b>9,690</b>	<b>8,729</b>	<b>8,779</b>	<b>10,195</b>	<b>10,197</b>	<b>10,406</b>	<b>127,941</b>	<b>124,868</b>
month-over-month % change	8.2%	-18.2%	14.9%	-4.7%	-9.9%	0.6%	0.0%	0.0%	2.0%		
year-over-year % change	0.4%	0.3%	33.7%	1.6%	-1.4%	10.8%	-6.5%	-6.1%	2.4%	2.6%	-2.4%
Misc Non Residential	0,646	0,473	0,316	0,577	0,569	0,478	0,598	0,591	0,562	7,661	6,981
month-over-month % change	9.9%	-26.8%	-33.1%	-8.2%	-1.5%	-15.9%	0.7%	-1.1%	-1.6%		
year-over-year % change	7.9%	-14.5%	-26.2%	-17.5%	-10.2%	-9.2%	-10.0%	-9.8%	-8.9%	-11.5%	-8.9%
<b>TOTAL NON-RES BUILDING</b>	<b>23,167</b>	<b>17,314</b>	<b>19,630</b>	<b>22,990</b>	<b>20,758</b>	<b>20,037</b>	<b>24,363</b>	<b>24,260</b>	<b>24,453</b>	<b>315,802</b>	<b>293,434</b>
month-over-month % change	6.3%	-25.3%	13.4%	-6.8%	-9.7%	-3.5%	-2.0%	-0.4%	0.8%		
year-over-year % change	-20.8%	-6.6%	13.3%	-17.5%	-20.9%	-7.7%	-8.3%	-8.4%	-7.1%	8.7%	-7.1%
Airports	1,012	0,404	0,235	0,737	0,658	0,550	0,594	0,595	0,597	12,541	7,166
month-over-month % change	81.8%	-60.1%	-42.0%	20.3%	-10.7%	-16.3%	-3.8%	0.2%	0.3%		
year-over-year % change	-21.7%	4.4%	9.9%	-65.6%	-67.7%	-12.8%	-44.1%	-44.0%	-42.9%	88.3%	-42.9%
Roads/Highways	4,412	3,982	3,552	5,156	4,296	3,982	5,093	5,205	5,299	53,103	63,579
month-over-month % change	-1.8%	-9.7%	-10.8%	16.0%	-16.7%	-7.3%	1.9%	2.2%	1.8%		
year-over-year % change	34.6%	50.8%	46.3%	32.2%	31.0%	43.1%	12.3%	14.9%	19.7%	3.9%	19.7%
Bridges	1,714	1,785	1,783	1,927	2,060	1,761	1,939	1,996	2,010	20,610	23,953
month-over-month % change	-36.1%	4.2%	-0.1%	-2.2%	6.9%	-14.5%	3.5%	2.3%	0.6%		
year-over-year % change	84.8%	42.7%	9.4%	37.5%	66.4%	38.7%	17.4%	17.7%	16.2%	42.1%	16.2%
Dams/Marine	1,087	0,585	0,483	0,825	0,818	0,718	0,676	0,571	0,573	5,089	6,874
month-over-month % change	39.1%	-46.2%	-17.4%	29.4%	-0.8%	-12.2%	8.0%	-0.8%	0.3%		
year-over-year % change	89.7%	-49.5%	-25.7%	108.0%	64.8%	28.4%	49.8%	38.5%	35.1%	36.1%	35.1%
Water/Sewage	2,434	2,023	2,080	2,241	2,213	2,179	2,435	2,457	2,484	32,041	29,836
month-over-month % change	11.4%	-16.9%	2.8%	-3.0%	-1.2%	-1.6%	0.5%	0.9%	1.2%		
year-over-year % change	6.6%	14.9%	20.2%	-3.9%	7.8%	13.2%	-11.6%	-10.9%	-6.9%	5.2%	-6.9%
Misc Civil (Power, etc.)	2,558	3,022	0,846	1,986	2,717	2,142	2,797	2,614	2,628	26,358	31,532
month-over-month % change	-0.5%	18.1%	-72.0%	45.0%	36.8%	-21.2%	2.2%	-6.6%	0.5%		
year-over-year % change	39.8%	-42.1%	24.6%	-36.1%	-27.3%	-16.9%	50.0%	18.2%	19.6%	100.1%	19.6%
<b>TOTAL ENGINEERING (Civil)</b>	<b>13,2</b>										