

# Construction Industry Snapshot

Issued: February 2019  
(based on January 2019 Starts Stats)

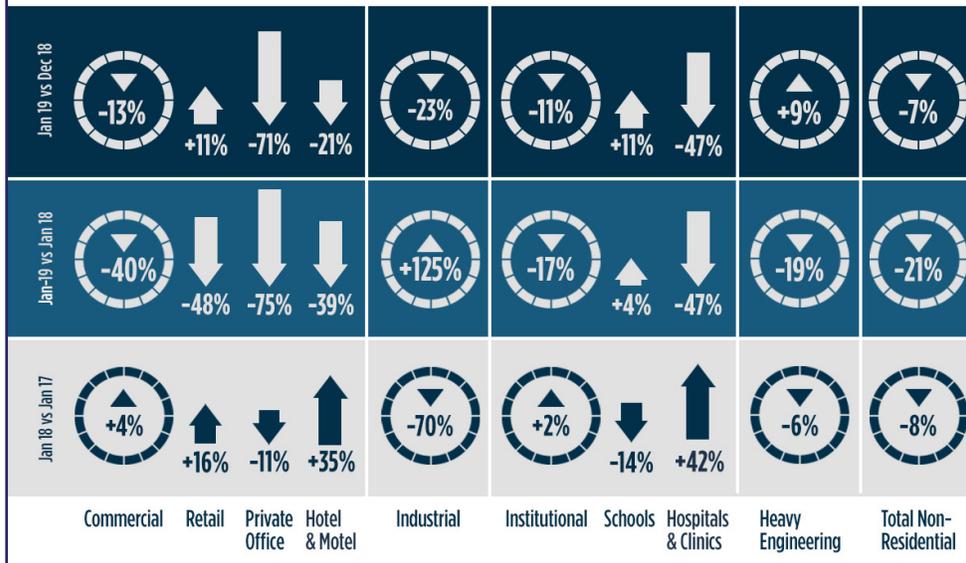
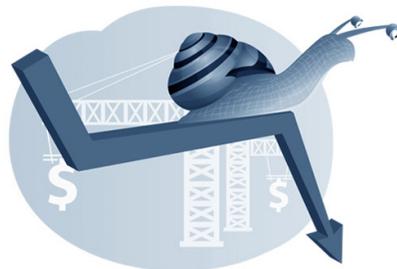


Marketing Analytics Team

## A Slow Beginning for 2019 Construction Starts

ConstructConnect announced today that January's volume of construction starts, excluding residential work, was \$27.8 billion, a change of -6.7% compared with December 2018.

The latest month-to-month adjustment was in close alignment with the usual shift in starts volumes between December and January, due to seasonality, of -8.5%. January 2019 compared with January 2018, however, was -20.6%.



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## January's Notable Points

- The month-to-month decline (-6.7%) in total nonresidential starts in January was caused by a fall in industrial (-23.3%) and similar-sized drops in institutional (-11.0%) and commercial (-13.3%). Only the heavy engineering type-of-structure category (+9.3%) managed a gain.
- The more substantial year-over-year (y/y) decrease (-20.6%) in total non-residential starts in the latest month (i.e., January 2018 versus January 2017) was due to severe shortfalls in commercial (-39.7%), heavy engineering (-19.2%) and institutional (-17.3%).

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## A Slow Beginning for 2019 Construction Starts

ConstructConnect announced today that January's volume of construction starts, excluding residential work, was \$27.8 billion, a change of -6.7% compared with December 2018's level of \$29.7 billion. The latest month-to-month adjustment was in close alignment with the usual shift in starts volumes between December and January, due to seasonality, of -8.5%.

Non-residential starts in January 2019 relative to the previous five-year average for January, — i.e., from 2014 through 2018, — were -4.5%. January 2019 compared with January 2018 was -20.6%. At \$35.0 billion, January 2018 managed an abnormally high volume of starts activity.

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 November, 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. The normal one-month lag in the timing of data releases has currently been stretched out. Census Bureau workers were off the job for 35 days due to the partial shutdown. Now that they have returned to work, the put-in-place numbers have been updated through November, which leaves them two months behind the starts data.

The U.S. construction sector (+52,000 jobs) undertook exceptionally strong hiring in January, according to the latest *Employment Situation* report from the BLS. The year-over-year change in construction jobs was +4.7%, a faster pace of gain than for any other major industrial sub-sector. "Transportation and warehousing" (+4.1%) firms were next quickest to add staff. By sub-categories of construction work, the year-over-year climb in jobs was +7.2% for both residential and heavy/civil engineering concerns. Nonresidential builders were more restrained, at +2.9%.

Construction's NSA unemployment rate in January was 6.4%, which marked a continuation of tightening (i.e., improvement) versus January 2018's figure of 7.3% and January 2017's 9.4%.

January 2019's year-over-year payroll changes in other pockets of the economy important to construction were as follows: 'machinery and equipment rental', +6.9%; 'oil and gas extraction', +6.2%; 'real estate firms',

+3.3%; 'architectural and engineering services', +2.5%; 'cement and concrete product manufacturing', +0.9%; and 'building material and supplies dealers', -0.3%.

The month-to-month decline (-6.7%) in total nonresidential starts in January was caused by a fall in industrial (-23.3%) and similar-sized drops in institutional (-11.0%) and commercial (-13.3%). Only the heavy engineering type-of-structure category (+9.3%) managed a gain.

The more substantial year-over-year (y/y) decrease (-20.6%) in total non-residential starts in the latest month (i.e., January 2018 versus January 2017) was due to severe shortfalls in commercial (-39.7%), heavy engineering (-19.2%) and institutional (-17.3%). Industrial (+125.3%), on the other hand, chose to dance to a different drumbeat and more than doubled.

For every month of the year except January, the narrative in this Industry Snapshot report would now move along to a discussion about year-to-date results. But January is unique in that its individual monthly numbers and its year-to-date (ytd) statistics are exactly the same.

The -23.3% drop in industrial starts m/m in January 2019 was due to the absence of a project as large as Micron Technology's plant expansion in Virginia, estimated at \$3.0 billion, which appeared in December 2018's starts. January 2019 groundbreakings did, however, include several notable industrial projects (see Top 10 list on page 4), led by an ethane exporting facility in Texas, valued at \$1.5 billion. On a y/y basis, January 2019 industrial starts were +125.3%.

The two primary contributors to 'heavy engineering/civil' stars in January 2019 were 'roads and highways' (a 38% share) and 'water and sewer' works (a 28% slice). Groundbreakings on the former in the latest month were +6.1% m/m, but -1.1% y/y; on the latter, they were a more robust +36.5% m/m, but faltered as well y/y, at -4.7%. Bridge starts, which have been setting a torrid pace over the past couple of years, cooled a bit in the latest month: -4.4% m/m and -12.3% y/y.

By a wide margin, the front-ranking share (57%) among institutional sub-categories in January belonged to 'schools/colleges'. Furthermore, the dollar volume of educational facility starts-ups in the latest month was notably positive: +10.6% m/m and +4.1% y/y. The dollar-volume starts performance of a combined medical facility sub-category, — i.e., embracing 'hospitals/clinics', 'nursing/assisted living' and 'medical miscellaneous' (and jointly accounting for 31% of institutional in January 2019) — was deeply negative: -26.0% m/m and -43.4% y/y.

Under the commercial umbrella in January 2019, there were numerous sub-categories with starts shortcomings. 'Hotel/motel' groundbreakings (20% of commercial in January) were -21.2% m/m and -38.9% y/y. 'Retail/shopping' starts (15% share) were

### TABLE 1: VALUE OF UNITED STATES CONSTRUCTION STARTS — JANUARY 2019 — ConstructConnect®

	Previous Annual		Latest Month		
	2018 (\$ billions)	% Change (18 vs 17)	Jan 2019 (\$ billions)	% Change Jan 19 vs Jan 18	% Change Jan 19 vs Dec 18
Hotel/Motel	25,797	-9.9%	1,319	-38.9%	-21.2%
Retail/Shopping	17,618	-11.9%	9,958	-47.7%	11.0%
Parking Garage	2,763	-21.4%	0,231	-7.9%	-24.3%
Amusement	8,373	6.6%	0,475	-42.9%	-25.1%
Private Office	28,514	-1.6%	0,618	-74.6%	-71.2%
Government Office	10,837	2.5%	0,787	35.5%	10.8%
Laboratory	3,033	1.3%	0,201	358.8%	-13.7%
Warehouse	20,209	-6.3%	0,849	-48.9%	40.6%
Misc. Commercial *	12,336	-36.2%	1,143	-0.6%	174.4%
<b>COMMERCIAL (big subset)</b>	<b>129,480</b>	<b>-9.7%</b>	<b>6,581</b>	<b>-39.7%</b>	<b>-13.3%</b>
<b>INDUSTRIAL (Manufacturing)</b>	<b>34,886</b>	<b>-5.1%</b>	<b>2,627</b>	<b>125.3%</b>	<b>-23.3%</b>
Religious	2,122	-5.5%	0,163	26.9%	-26.0%
Hospital/Clinic	16,009	-3.7%	1,182	-47.2%	-46.9%
Nursing/Assisted Living	10,319	-13.3%	0,930	-28.9%	23.0%
Library/Museum	2,751	-23.2%	0,125	-39.2%	-20.9%
Fire/Police/Courthouse/Prison	8,182	-3.1%	0,504	-1.7%	-34.9%
Military	5,562	16.5%	0,257	53.0%	-46.9%
School/College	70,131	1.0%	4,795	-4.1%	10.6%
Miscellaneous Medical	10,666	-2.2%	0,490	-53.3%	-7.8%
<b>INSTITUTIONAL</b>	<b>125,742</b>	<b>-1.7%</b>	<b>8,446</b>	<b>-17.3%</b>	<b>-11.0%</b>
Misc. Non-residential	6,972	-9.0%	0,375	-38.6%	8.2%
<b>NON-RES. BUILDING</b>	<b>297,080</b>	<b>-5.9%</b>	<b>18,030</b>	<b>-21.3%</b>	<b>-13.5%</b>
Airport	7,227	-42.4%	0,499	-49.0%	53.0%
Road/Highway	63,584	19.7%	3,734	-1.1%	6.1%
Bridge	24,040	16.6%	1,702	-12.3%	-4.4%
Dam/Marine	6,250	34.6%	0,381	22.0%	-21.7%
Water/Sewage	29,453	-8.1%	2,732	-4.7%	36.5%
Miscellaneous Civil (power, etc.)	31,622	20.0%	0,736	-67.1%	-11.8%
<b>HEAVY ENGINEERING (Civil)</b>	<b>162,777</b>	<b>8.7%</b>	<b>9,784</b>	<b>-19.2%</b>	<b>9.3%</b>
<b>TOTAL</b>	<b>459,856</b>	<b>-1.2%</b>	<b>27,814</b>	<b>-20.6%</b>	<b>-6.7%</b>

\* Includes transportation terminals and sports arenas.

Source: ConstructConnect Research Group/Table: ConstructConnect.

+11.0% m/m, but -47.7% y/y. Warehouse starts (13%) were +40.6% m/m, but -48.9% y/y. 'Private office building' starts were -71.2% m/m and -74.6% y/y. The private-office dollar volume dipped below government offices.

Page 5 sets out 12-month moving average trend graphs for key type-of-structure categories. In Graph 1, the nonresidential building curve is gently descending while heavy engineering is gradually ascending. In Graph 2, the commercial and institutional lines are almost on top of one another, with mild weakness developing in 2018. In Graphs 3 through 6, the structure types showing the most uplift of late have been roads/highways and bridges. Those demonstrating a tendency to retreat have been retail and hospitals/clinics. 'Miscellaneous civil' in Graph 6 is coming back down to earth but remains one-third higher than its best levels from 2010 to 2015.

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.

From January's Table B-3, the 'all jobs' pay increases were +3.2% hourly and +3.5% weekly. Construction workers did worse hourly, +2.8%, but considerably better weekly, +4.9%. From Table B-8, which omits supervisory personnel, the economy-wide compensation increases were +3.4% hourly and +3.7% weekly. Again, construction workers, as a subset, fell behind (but only slightly) in their hourly earnings, +3.3%, but

they more than made up for it weekly, +5.6%.

Further on costing, December 2018's y/y results for three BLS Producer Price Index (PPI) series were: 'construction materials special index', +6.3%; 'inputs to new construction index, excluding capital investment, labor and imports', +3.8%; 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 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.

ConstructConnect's single-family plus multi-family residential starts in January were -3.4% m/m; and -20.3% y/y. 'Grand total' starts were -5.4% m/m; and -20.5% ytd. With respect to single-family housing starts during the last couple of months, Census Bureau statisticians, who were sidelined for 35 days by the 'shutdown', have not been able to provide in-depth guidance. ConstructConnect's single-family starts numbers for December and January are best estimates. ♦

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 — JANUARY 2019  
ARRANGED TO MATCH THE ALPHABETICAL CATEGORY DROP-DOWN MENUS IN INSIGHT**

	Previous Annual		Latest Month		
	2018 (\$ billions)	% Change (18 vs 17)	Jan 2019 (\$ billions)	% Change Jan 19 vs Jan 18	% Change Jan 19 vs Dec 18
<b>Summary</b>					
CIVIL	162.777	8.7%	9.784	-19.2%	9.3%
NON-RESIDENTIAL BUILDING	297.080	-5.9%	18.030	-21.3%	-13.5%
RESIDENTIAL	289.770	-8.9%	17.935	-20.3%	-3.4%
<b>GRAND TOTAL</b>	<b>749.626</b>	<b>-4.3%</b>	<b>45.749</b>	<b>-20.5%</b>	<b>-5.4%</b>
<b>Verticals</b>					
Airport	7.227	-42.4%	0.499	-49.0%	53.0%
All Other Civil	24.199	54.9%	0.600	-16.5%	-3.2%
Bridges	24.040	16.6%	1.702	-12.3%	-4.4%
Dams / Canals / Marine Work	6.850	34.6%	0.381	22.0%	-21.7%
Power Infrastructure	7.423	-30.8%	0.135	-91.1%	-36.6%
Roads	63.584	19.7%	3.734	-1.1%	6.1%
Water and Sewage Treatment	29.453	-8.1%	2.732	-4.7%	36.5%
<b>CIVIL</b>	<b>162.777</b>	<b>8.7%</b>	<b>9.784</b>	<b>-19.2%</b>	<b>9.3%</b>
Offices (private)	28.514	-1.6%	0.618	-74.6%	-71.2%
Parking Garages	2.763	-21.4%	0.231	7.9%	-24.3%
Transportation Terminals	5.111	33.1%	0.227	-49.2%	136.8%
<b>Commercial (small subset)</b>	<b>36.388</b>	<b>0.2%</b>	<b>1.076</b>	<b>-65.3%</b>	<b>-57.8%</b>
Amusement	8.373	6.6%	0.475	-42.9%	-25.1%
Libraries / Museums	2.751	-23.2%	0.125	-39.2%	-20.9%
Religious	2.122	-5.5%	0.163	26.9%	-26.0%
Sports Arenas / Convention Centers	7.225	-53.4%	0.916	30.3%	185.6%
<b>Community</b>	<b>20.471</b>	<b>-29.8%</b>	<b>1.679</b>	<b>-10.2%</b>	<b>26.0%</b>
College / University	18.982	-14.8%	1.575	-5.0%	15.5%
Elementary / Pre School	19.201	1.7%	0.982	-13.4%	22.7%
Jr / Sr High School	30.221	13.8%	2.052	26.9%	-2.3%
Special / Vocational	1.727	-1.3%	0.185	-5.6%	157.1%
<b>Educational</b>	<b>70.131</b>	<b>1.0%</b>	<b>4.795</b>	<b>4.1%</b>	<b>10.6%</b>
Courthouses	1.904	-29.4%	0.091	235.5%	-76.7%
Fire and Police Stations	3.047	6.6%	0.209	1.2%	-1.1%
Government Offices	10.837	2.5%	0.787	35.5%	10.8%
Prisons	3.231	12.0%	0.204	-27.0%	19.4%
<b>Government</b>	<b>19.019</b>	<b>0.0%</b>	<b>1.292</b>	<b>18.1%</b>	<b>-13.0%</b>
Industrial Labs / Labs / School Labs	3.033	1.3%	0.201	358.8%	-13.7%
Manufacturing	34.886	-5.1%	2.627	125.3%	-23.3%
Warehouses	20.209	-6.3%	0.849	-48.9%	40.6%
<b>Industrial</b>	<b>58.128</b>	<b>-5.2%</b>	<b>3.677</b>	<b>28.1%</b>	<b>-13.7%</b>
Hospitals / Clinics	16.009	-3.7%	1.182	-47.2%	-46.9%
Medical Misc.	10.666	-2.2%	0.490	-53.3%	-7.8%
Nursing Homes	10.319	-13.3%	0.930	-28.9%	23.0%
<b>Medical</b>	<b>36.994</b>	<b>-6.2%</b>	<b>2.602</b>	<b>-43.4%</b>	<b>-26.0%</b>
<b>Military</b>	<b>5.562</b>	<b>16.5%</b>	<b>0.257</b>	<b>53.0%</b>	<b>-46.9%</b>
Hotels	25.797	-9.9%	1.319	-38.9%	-21.2%
Retail Misc.	6.972	-9.0%	0.375	-38.6%	8.2%
Shopping	17.618	-11.9%	0.958	-47.7%	11.0%
<b>Retail</b>	<b>50.387</b>	<b>-10.5%</b>	<b>2.652</b>	<b>-42.4%</b>	<b>-8.0%</b>
<b>NON-RESIDENTIAL BUILDING</b>	<b>297.080</b>	<b>-5.9%</b>	<b>18.030</b>	<b>-21.3%</b>	<b>-13.5%</b>
Multi-Family	88.710	-24.8%	4.845	-39.3%	-25.5%
Single-Family	201.060	0.6%	13.090	-9.8%	8.6%
<b>RESIDENTIAL</b>	<b>289.770</b>	<b>-8.9%</b>	<b>17.935</b>	<b>-20.3%</b>	<b>-3.4%</b>
<b>NON-RESIDENTIAL</b>	<b>459.856</b>	<b>-1.2%</b>	<b>27.814</b>	<b>-20.6%</b>	<b>-6.7%</b>
<b>GRAND TOTAL</b>	<b>749.626</b>	<b>-4.3%</b>	<b>45.749</b>	<b>-20.5%</b>	<b>-5.4%</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.

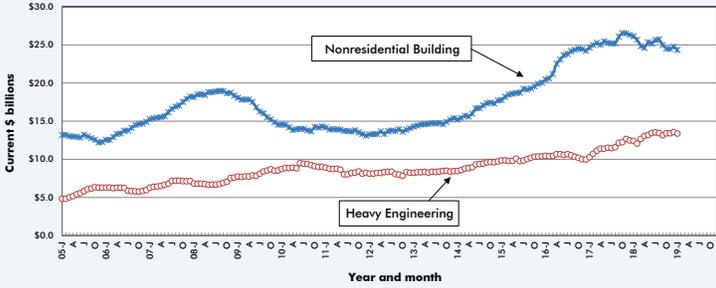
**TABLE 3: ConstructConnect's TOP 10 PROJECT STARTS IN JANUARY 2019**

LOCATION (EAST TO WEST)	TYPE OF CONSTRUCTION	DESCRIPTION	SQUARE FEET 000S*	DOLLARS 000,000S
<b>New Hampshire</b> Hanover	Institutional	Thayer School of Engineering & Department of Computer Science Expansion - Dartmouth College (2 structures; 4 stories) 14 Engineering Dr Dartmouth College Office of Planning, Design & Construction	180	\$200
<b>New York</b> Brooklyn	Institutional	Coney Island Hospital Complex Renovation & Addition (2 structures; 11 stories; 467 beds) 2619 Ocean Pkwy Coney Island Hospital	903	\$738
<b>New Jersey</b> Montclair	Residential	Bloomfield Avenue Mixed-Use Development (5 structures; 6 stories; 200 units) Bloomfield Ave Ironstate Development	1,002	\$135
<b>Pennsylvania</b> Philadelphia	Commercial	Live! Hotel & Casino (3 structures; 13 stories; 2820 units) 900 Packer Ave The Cordish Company	1,500	\$700
Hershey	Commercial	Hershey's Chocolatetown at Hersheypark (3 structures) 100 Hersheypark Dr Hershey Entertainment & Resorts	*	\$150
<b>Alabama</b> Huntsville	Industrial	Blue Origin Manufacturing Plant - Cummings Research Park / Huntsville (1 structure) 1100 Explorer Blvd Blue Origin LLC	200	\$200
<b>Wisconsin</b> Milwaukee	Industrial	Caterpillar Office Campus Redevelopment / Milwaukee (1 structure) 1118 E Rawson Ave Reich Brothers - Headquarters	750	\$403
<b>Texas</b> Beaumont	Industrial	Ethane Export Facility - Martin Midstream Facility (1 structure) 1 Gulf States Rd Martin Midstream Partners	*	\$1,500
Laredo	Industrial	Port Grande Logistics Port / Laredo (2 structures; 450 units) 1402 Carriers Dr Majestic Realty Co. - Los Angeles	423	\$230
<b>Hawaii</b> Ewa Beach	Civil/Engineering	Honouliuli Wastewater Treatment Plant Secondary Treatment Phase 1B - Secondary Compliance Facilities (1 structure) 96-1000 Geiger Rd City and County of Honolulu - Purchasing	*	\$267
<b>TOTALS:</b>			<b>4,958</b>	<b>\$4,523</b>

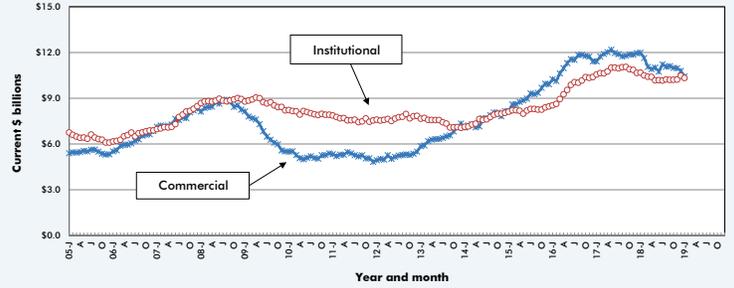
\*A square footage measure does not apply for alteration, some forms of industrial (e.g., petrochemical) and most engineering/civil work.

Source: ConstructConnect/Table: ConstructConnect.

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



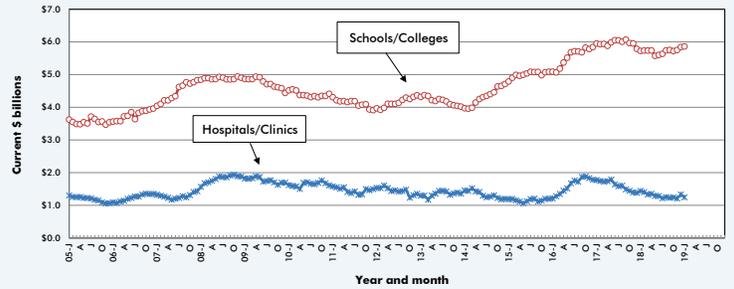
**GRAPH 2: U.S. COMMERCIAL AND INSTITUTIONAL CONSTRUCTION STARTS — ConstructConnect® (12-MONTH MOVING AVERAGES)**



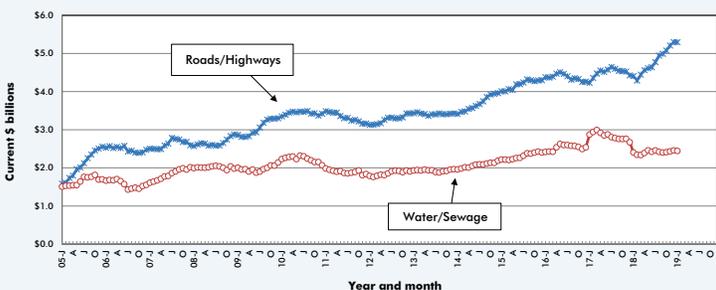
**GRAPH 3: U.S. RETAIL AND PRIVATE OFFICE BUILDING CONSTRUCTION STARTS — ConstructConnect® (12-MONTH MOVING AVERAGES)**



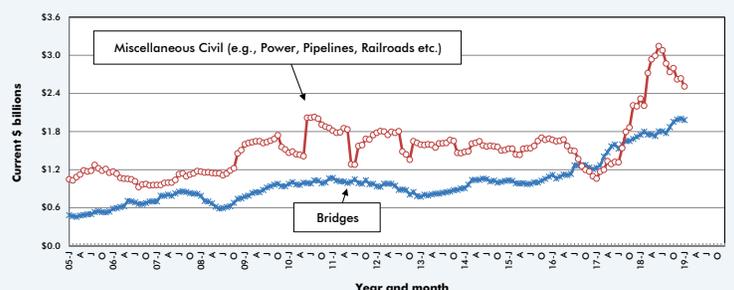
**GRAPH 4: U.S. HOSPITAL/CLINIC AND SCHOOL/COLLEGE CONSTRUCTION STARTS — ConstructConnect® (12-MONTH MOVING AVERAGES)**



**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 January, 2019.

Source: ConstructConnect/Charts: ConstructConnect.

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

	Jan 2018	Jan 2019	% Change
Connecticut	\$111,685,191	\$167,001,580	49.5%
Maine	\$54,130,318	\$103,952,716	92.0%
Massachusetts	\$645,056,508	\$494,552,456	-23.3%
New Hampshire	\$57,970,064	\$224,415,510	287.1%
Rhode Island	\$170,045,775	\$39,531,624	-76.8%
Vermont	\$45,258,756	\$10,943,092	-75.8%
<b>Total New England</b>	<b>\$1,084,146,612</b>	<b>\$1,040,396,978</b>	<b>-4.0%</b>
New Jersey	\$448,468,365	\$394,786,321	-12.0%
New York	\$1,591,843,326	\$1,697,721,272	6.7%
Pennsylvania	\$1,147,550,728	\$1,511,454,582	31.7%
<b>Total Middle Atlantic</b>	<b>\$3,187,862,419</b>	<b>\$3,603,962,175</b>	<b>13.1%</b>
<b>TOTAL NORTHEAST</b>	<b>\$4,272,009,031</b>	<b>\$4,644,359,153</b>	<b>8.7%</b>
Illinois	\$573,659,582	\$609,382,121	6.2%
Indiana	\$310,767,130	\$458,178,905	47.4%
Michigan	\$457,723,631	\$346,312,777	-24.3%
Ohio	\$1,802,892,324	\$463,056,718	-74.3%
Wisconsin	\$618,979,587	\$853,739,308	37.9%
<b>Total East North Central</b>	<b>\$3,764,022,254</b>	<b>\$2,730,669,829</b>	<b>-27.5%</b>
Iowa	\$245,717,021	\$165,123,383	-32.8%
Kansas	\$711,501,707	\$305,068,664	-57.1%
Minnesota	\$497,572,387	\$255,744,757	-48.6%
Missouri	\$932,454,273	\$368,828,123	-60.4%
Nebraska	\$107,734,180	\$348,077,760	223.1%
North Dakota	\$360,319,133	\$49,950,482	-86.1%
South Dakota	\$176,802,417	\$65,425,998	-63.0%
<b>Total West North Central</b>	<b>\$3,032,101,118</b>	<b>\$1,558,219,167</b>	<b>-48.6%</b>
<b>TOTAL MIDWEST</b>	<b>\$6,796,123,372</b>	<b>\$4,288,888,996</b>	<b>-36.9%</b>
Delaware	\$25,820,142	\$54,124,635	109.6%
District of Columbia	\$55,708,656	\$70,000,000	25.7%
Florida	\$2,146,860,485	\$1,699,694,686	-20.8%
Georgia	\$900,822,278	\$500,524,409	-44.4%
Maryland	\$1,082,831,503	\$519,887,918	-52.0%
North Carolina	\$1,063,437,620	\$885,084,880	-16.8%
South Carolina	\$717,370,481	\$320,692,522	-55.3%
Virginia	\$513,404,778	\$780,745,768	52.1%
West Virginia	\$75,171,168	\$78,533,096	4.5%
<b>Total South Atlantic</b>	<b>\$6,581,427,111</b>	<b>\$4,909,287,914</b>	<b>-25.4%</b>
Alabama	\$1,168,772,390	\$656,240,853	-43.9%
Kentucky	\$320,424,952	\$217,137,473	-32.2%
Mississippi	\$184,175,850	\$142,291,150	-22.7%
Tennessee	\$703,702,026	\$648,066,523	-7.9%
<b>Total East South Central</b>	<b>\$2,377,075,218</b>	<b>\$1,663,735,999</b>	<b>-30.0%</b>
Arkansas	\$333,283,458	\$186,342,364	-44.1%
Louisiana	\$1,349,697,549	\$448,503,215	-66.8%
Oklahoma	\$1,050,572,989	\$341,921,410	-67.5%
Texas	\$4,264,371,996	\$4,987,835,018	17.0%
<b>Total West South Central</b>	<b>\$6,997,925,992</b>	<b>\$5,964,602,007</b>	<b>-14.8%</b>
<b>TOTAL SOUTH</b>	<b>\$15,956,428,321</b>	<b>\$12,537,625,920</b>	<b>-21.4%</b>
Arizona	\$1,081,820,008	\$552,853,291	-48.9%
Colorado	\$443,230,507	\$860,848,117	94.2%
Idaho	\$90,735,740	\$104,520,107	15.2%
Montana	\$36,374,884	\$26,061,358	-28.4%
Nevada	\$333,055,485	\$434,514,825	30.5%
New Mexico	\$234,917,433	\$93,997,856	-60.0%
Utah	\$1,008,772,483	\$160,750,818	-84.1%
Wyoming	\$29,828,812	\$35,641,119	19.5%
<b>Total Mountain</b>	<b>\$3,258,735,352</b>	<b>\$2,269,187,491</b>	<b>-30.4%</b>
Alaska	\$143,734,449	\$53,230,560	-63.0%
California	\$3,375,677,020	\$2,660,676,857	-21.2%
Hawaii	\$199,122,291	\$605,887,581	204.3%
Oregon	\$301,362,568	\$240,084,271	-20.3%
Washington	\$716,186,770	\$514,234,913	-28.2%
<b>Total Pacific</b>	<b>\$4,736,083,098</b>	<b>\$4,074,114,182</b>	<b>-14.0%</b>
<b>TOTAL WEST</b>	<b>\$7,994,818,450</b>	<b>\$6,343,301,673</b>	<b>-20.7%</b>
<b>TOTAL U.S.</b>	<b>\$35,019,379,174</b>	<b>\$27,814,175,742</b>	<b>-20.6%</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 — JANUARY 2019 — ConstructConnect®**  
**BILLIONS OF CURRENT \$\$, NOT SEASONALLY ADJUSTED (NSA)**

	Latest month actuals			Moving averages (placed in end month)						Year to Date	
	Nov 18	Dec 18	Jan 19	Nov 18	Dec 18	Jan 19	Nov 18	Dec 18	Jan 19	2018	2019
<b>Single Family</b>	13,276	12,054	13,090	15,488	13,942	12,807	16,831	16,755	16,637	14,509	13,090
month-over-month % change	-19.5%	-9.2%	8.6%	-9.3%	-10.0%	-8.1%	-1.3%	-0.4%	-0.7%	13.8%	-9.8%
year-over-year % change	-17.1%	-7.0%	-9.8%	-7.3%	-9.9%	-11.6%	1.1%	0.6%	-1.0%	13.8%	-9.8%
<b>Apartment</b>	6,311	6,504	4,845	7,218	6,982	5,887	7,376	7,392	7,131	7,984	4,845
month-over-month % change	-22.4%	3.1%	-25.5%	-6.6%	-3.3%	-15.7%	-3.4%	0.2%	-3.5%	15.8%	-39.3%
year-over-year % change	-33.2%	3.1%	-39.3%	-24.0%	-19.5%	-25.6%	-25.3%	-24.8%	-25.6%	15.8%	-39.3%
<b>TOTAL RESIDENTIAL</b>	19,587	18,559	17,935	22,706	20,924	18,694	24,207	24,147	23,768	22,494	17,935
month-over-month % change	-20.5%	-5.2%	-3.4%	-8.4%	-7.8%	-10.7%	-2.0%	-0.2%	-1.6%	14.5%	-12.6%
year-over-year % change	-23.1%	-3.7%	-20.3%	-13.4%	-13.3%	-16.6%	-8.7%	-8.9%	-10.3%	0.0%	-20.3%
<b>Hotel/Motel</b>	1,800	1,674	1,319	2,055	1,869	1,598	2,122	2,150	2,080	2,150	1,319
month-over-month % change	-15.6%	-7.0%	-21.2%	4.3%	-9.0%	-14.5%	-0.3%	1.3%	-3.3%	35.2%	-38.9%
year-over-year % change	-3.8%	24.8%	-38.9%	-6.7%	0.8%	-10.8%	-11.3%	-9.9%	-14.6%	35.2%	-38.9%
<b>Retail/Shopping</b>	1,066	0,863	0,958	1,251	1,003	0,962	1,491	1,468	1,395	1,832	0,958
month-over-month % change	-1.1%	-19.1%	11.0%	-10.1%	-19.9%	-4.0%	-1.7%	-1.5%	-5.0%	15.8%	-47.7%
year-over-year % change	-22.3%	-24.2%	-47.7%	-17.6%	-31.1%	-33.5%	-12.8%	-11.9%	-17.3%	15.8%	-47.7%
<b>Parking Garages</b>	0,381	0,305	0,231	0,221	0,285	0,306	0,251	0,230	0,232	0,214	0,231
month-over-month % change	124.6%	-19.8%	-24.3%	46.6%	29.3%	7.2%	7.8%	-8.2%	0.6%	13.1%	0.6%
year-over-year % change	132.6%	-44.7%	7.9%	-25.0%	-31.0%	-1.4%	-5.2%	-21.4%	-22.1%	34.1%	7.9%
<b>Amusement</b>	0,648	0,634	0,475	0,865	0,823	0,585	0,717	0,698	0,668	0,832	0,475
month-over-month % change	-45.4%	-2.2%	-25.1%	8.5%	-4.9%	-28.8%	3.4%	-2.8%	-4.3%	65.8%	-42.9%
year-over-year % change	76.4%	-27.2%	-42.9%	59.5%	29.3%	-15.1%	15.6%	6.6%	-2.1%	65.8%	-42.9%
<b>Office</b>	1,342	2,150	0,618	1,796	2,005	1,370	2,302	2,376	2,224	2,438	0,618
month-over-month % change	-46.8%	60.2%	-71.2%	-5.2%	11.6%	-31.7%	-3.6%	3.2%	-6.4%	11.5%	-74.6%
year-over-year % change	-43.8%	70.2%	-74.6%	-11.5%	14.1%	-32.5%	-6.7%	-1.6%	-6.9%	11.5%	-74.6%
<b>Governmental Offices</b>	0,907	0,710	0,787	1,043	0,856	0,802	0,889	0,903	0,920	0,581	0,787
month-over-month % change	-4.7%	-21.7%	10.8%	5.7%	-17.9%	-6.4%	2.7%	1.6%	1.9%	1.1%	1.143
year-over-year % change	44.5%	31.2%	35.5%	46.5%	31.9%	37.4%	-6.7%	2.5%	8.1%	-38.2%	35.5%
<b>Laboratories</b>	0,175	0,233	0,201	0,242	0,204	0,203	0,261	0,253	0,266	0,044	0,201
month-over-month % change	-13.6%	33.1%	-13.7%	-5.1%	-15.8%	-0.2%	0.1%	-3.1%	5.2%	1.8%	358.8%
year-over-year % change	1.8%	-29.5%	358.8%	19.2%	-16.1%	11.5%	11.2%	1.3%	9.3%	-63.2%	358.8%
<b>Warehouse</b>	1,822	0,604	0,849	1,804	1,361	1,091	1,735	1,684	1,616	1,660	0,849
month-over-month % change	9.8%	-66.9%	40.6%	3.8%	-24.5%	-19.8%	2.4%	-2.9%	-4.0%	13.7%	-48.9%
year-over-year % change	37.5%	-50.1%	-48.9%	11.2%	-3.3%	-21.9%	-2.7%	-6.3%	-10.9%	13.7%	-48.9%
<b>Misc Commercial</b>	0,710	0,416	1,143	0,542	0,560	0,756	0,712	1,028	1,027	1,149	1,143
month-over-month % change	28.2%	-41.3%	174.9%	22.3%	11.4%	35.1%	0.1%	15.2%	0.1%	1.2%	0.163
year-over-year % change	2.5%	-84.1%	-0.6%	-45.0%	-68.8%	-49.2%	-15.9%	-36.2%	-35.3%	-19.0%	-0.6%
<b>TOTAL COMMERCIAL</b>	8,851	7,589	6,581	9,908	8,966	7,674	10,980	10,790	10,429	10,911	6,581
month-over-month % change	-15.4%	-14.3%	-13.3%	0.9%	-9.5%	-14.4%	-0.1%	-1.7%	-3.3%	3.6%	-39.7%
year-over-year % change	-1.5%	-23.1%	-39.7%	-3.5%	-12.2%	-22.6%	-7.5%	-9.7%	-13.0%	3.6%	-39.7%
<b>TOTAL INDUSTRIAL (Manufacturing)</b>	0,905	3,427	2,627	1,911	2,344	2,319	2,668	2,907	3,029	1,166	2,627
month-over-month % change	-66.5%	278.8%	-23.3%	-40.1%	22.7%	-1.1%	-1.0%	9.0%	4.2%	-70.3%	125.3%
year-over-year % change	-26.0%	517.9%	125.3%	-70.6%	-23.1%	136.6%	-15.2%	15.2%	6.9%	-70.3%	125.3%
<b>Religious</b>	0,161	0,220	0,153	0,155	0,166	0,181	0,170	0,177	0,180	0,128	0,163
month-over-month % change	39.2%	37.0%	-26.0%	-2.6%	6.6%	9.6%	2.4%	3.9%	1.6%	1.6%	26.9%
year-over-year % change	42.4%	56.6%	26.9%	1.2%	6.1%	42.4%	-9.5%	-5.5%	-2.0%	26.9%	26.9%
<b>Hospitals/Clinics</b>	0,548	2,227	1,182	0,843	1,296	1,319	1,208	1,334	1,246	2,238	1,182
month-over-month % change	-50.7%	306.3%	-46.9%	-27.0%	53.6%	1.8%	-2.9%	10.4%	-6.6%	41.6%	-47.2%
year-over-year % change	-44.1%	211.0%	-47.2%	-17.3%	45.9%	0.6%	-13.4%	-3.7%	-13.5%	41.6%	-47.2%
<b>Nursing/Assisted Living</b>	0,759	0,756	0,930	0,863	0,852	0,815	0,871	0,860	0,828	1,307	0,930
month-over-month % change	-27.1%	-0.4%	23.0%	8.1%	-1.3%	-4.3%	-3.8%	-1.3%	-3.7%	166.3%	-28.9%
year-over-year % change	-35.2%	-15.4%	-28.9%	-17.8%	-17.5%	-27.5%	-11.6%	-13.3%	-21.9%	166.3%	-28.9%
<b>Libraries/Museums</b>	0,254	0,158	0,123	0,208	0,248	0,179	0,229	0,228	0,223	0,206	0,123
month-over-month % change	-35.3%	-37.8%	-20.9%	8.8%	12.1%	-33.3%	4.0%	-0.1%	-2.9%	1.2%	-39.2%
year-over-year % change	70.5%	-1.1%	-39.2%	34.3%	53.8%	4.4%	-29.8%	-23.2%	-21.1%	-48.9%	-39.2%
<b>Fire/Police/Courthouse/Prison</b>	0,743	0,775	0,504	0,716	0,843	0,674	0,659	0,682	0,681	0,513	0,504
month-over-month % change	-26.4%	4.3%	-34.9%	-6.1%	17.6%	-20.0%	3.7%	3.5%	-0.1%	-43.1%	-1.7%
year-over-year % change	61.7%	55.9%	-1.7%	16.7%	49.8%	37.6%	-6.0%	-3.1%	1.5%	-43.1%	-1.7%
<b>Military</b>	0,682	0,483	0,257	0,691	0,666	0,474	0,446	0,463	0,471	0,168	0,257
month-over-month % change	-18.1%	-29.2%	-46.9%	10.7%	-3.5%	-28.8%	3.8%	3.9%	1.6%	1.6%	53.0%
year-over-year % change	40.7%	75.3%	53.0%	8.4%	33.8%	53.2%	16.1%	16.5%	21.4%	-42.1%	53.0%
<b>Schools/Colleges</b>	4,117	4,335	1,795	4,392	4,289	4,414	5,754	5,844	5,860	4,604	4,795
month-over-month % change	-6.7%	5.3%	-10.6%	-13.9%	-2.4%	3.0%	0.6%	1.6%	0.3%	1.2%	4.1%
year-over-year % change	10.7%	33.4%	4.1%	1.0%	9.2%	14.5%	-3.4%	1.0%	2.4%	-14.4%	4.1%
<b>Misc Medical</b>	0,675	0,532	0,490	0,866	0,634	0,566	0,889	0,889	0,842	1,051	0,490
month-over-month % change	-2.6%	-21.2%	-7.8%	-2.1%	-26.8%	-10.7%	-0.3%	0.0%	-5.3%	33.4%	-53.3%
year-over-year % change	-4.9%	-0.7%	-53.3%	8.2%	-7.2%	-26.1%	-3.9%	-2.2%	-9.5%	33.4%	-53.3%
<b>TOTAL INSTITUTIONAL</b>	7,939	9,487	8,446	8,831	9,013	8,624	10,227	10,478	10,331	10,216	8,446
month-over-month % change	-17.4%	19.5%	-11.0%	-9.5%	2.1%	-4.3%	0.1%	2.5%	-1.4%	2.1%	-17.3%
year-over-year % change	2.0%	46.7%	-17.3%	-0.2%	13.7%	5.7%	-5.8%	-1.7%	-3.3%	2.1%	-17.3%
<b>Misc Non Residential</b>	0,488	0,347	0,375	0,563	0,496	0,403	0,588	0,581	0,561	0,611	0,375
month-over-month % change	-25.3%	-29.0%	8.2%	-0.7%	-11.9%	-18.7%	-0.9%	-1.2%	-3.4%	24.0%	-38.6%
year-over-year % change	-11.7%	-19.1%	-38.6%	-11.0%	-5.8%	-24.0%	-10.3%	-9.0%	-13.4%	24.0%	-38.6%
<b>TOTAL NON-RES BUILDING</b>	18,183	20,849	18,030	21,213	20,819	19,021	24,462	24,757	24,351	22,904	18,030
month-over-month % change	-22.4%	14.7%	-13.5%	-9.1%	-1.9%	-8.6%	-0.1%	1.2%	-1.6%	-8.2%	-21.3%
year-over-year % change	-1.9%	20.4%	-21.3%	-19.2%	-4.1%	-2.9%	-7.8%	-5.9%	-6.9%	-8.2%	-21.3%
<b>Airports</b>	0,385	0,326	0,499	0,658	0,570	0,403	0,593	0,602	0,562	0,978	0,499
month-over-month % change	-61.5%	-15.3%	53.0%	-10.9%	-13.4%	-29.2%	0.0%	1.6%	-6.6%	326.7%	-49.0%
year-over-year % change	-0.6%	52.8%	-49.0%	-67.7%	-9.7%	-23.3%	-44.3%	-42.4%	-49.2%	326.7%	-49.0%
<b>Roads/Highways</b>	4,200	3,519	3,734	4,338	4,021	3,818	5,208	5,299	5,295	3,778	3,734
month-over-month % change	-3.3%	-16.2%	6.1%	-15.3%	-7.3%	-5.0%	2.6%	1.7%	0.1%	-5.3%	-1.1%
year-over-year % change	59.0%	45.0%	-1.1%	32.2%	44.5%	29.5%	15.0%	19.7%	20.1%	-5.3%	-1.1%
<b>Bridges</b>	1,696	1,781	1,702	2,093	1,801	1,726	1,991	2,003	1,983	1,942	1,702
month-over-month % change	-12.0%	5.0%	-4.4%	5.2%	-14.0%	-4.1%	1.9%	0.6%	-1.0%	24.8%	-12.3%
year-over-year % change	35.6%	9.3%	-12.3%	69.1%	41.9%	7.4%	18.1%	16.6%	13.4%	24.8%	-12.3%
<b>Dams/Marine</b>	0,587	0,486	0,381	0,809	0,718	0,485	0,569	0,571	0,577	0,312	0,381
month-over-month % change	-45.7%	-17.3%	-21.7%	-0.7%	-11.2%	-32.6%	-0.7%	0.3%	1.0%	1.8%	22.0%
year-over-year % change	-8.1%	-4.4%	-22.0%	62.2%	28.5%	2.6%	37.9%	34.6%	35.8%	1.8%	22.0%
<b>Water/Sewage</b>	2,008	2,002	2,732	2,111	2,137	2,247	2,432	2,454	2,443	2,866	2,732
month-over-month % change	-16.4%	-0.3%	36.5%	-1.9%	1.2%	5.2%	0.9%	0.9%	-0.5%	52.8%	-4.7%
year-over-year % change	14.1%	15.7%	-4.7%	2.8%	11.0%	6.0%	-11.9%	-8.1%	1.7%	-52.8%	-4.7%
<b>Misc Civil (Power, etc.)</b>	3,124	0,834	0,736	2,748	2,168	1,565	2,622	2,635	2,510	2,240	0,736
month-over-month % change	22.7%	-73.3%	-11.8%	38.6%	-21.1%	-27.8%	-6.3%	0.5%	-4.8%	187.6%	-67.1%
year-over-year % change	-40.2%</										