

This biennial report presents a summary of union and non-union employment trends for craft workers in the construction industry. The previous report made the following conclusions:

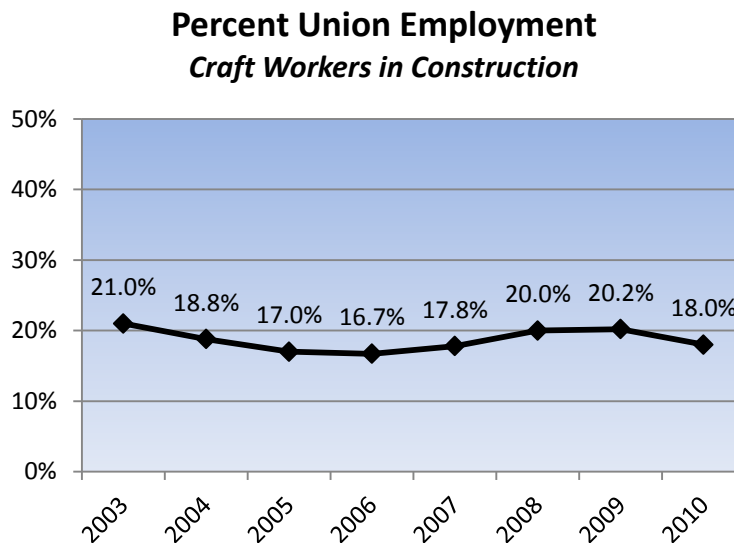
- Rate of unionization increased in all regions
- Number of union workers increased in all regions
- Total construction employment declined in all regions but one

Only one of those statements remains true today: the decline in total construction employment. This report shows that while the percent of employees represented by unions (market share) declined modestly since 2008, the number of union workers has declined substantially since then. Both the market share and number of union workers were significantly higher in the 1970's and earlier.

Market Share

Among craft workers in the construction industry, the market share was 18.0 percent in 2010, a decline of 2.0 percent from 2008 (but about the same as the 17.8 percent rate in 2007). However, in order to better understand market share, it is useful to consider the employment figures that are used to comprise these percentages: total number employed and union represented.

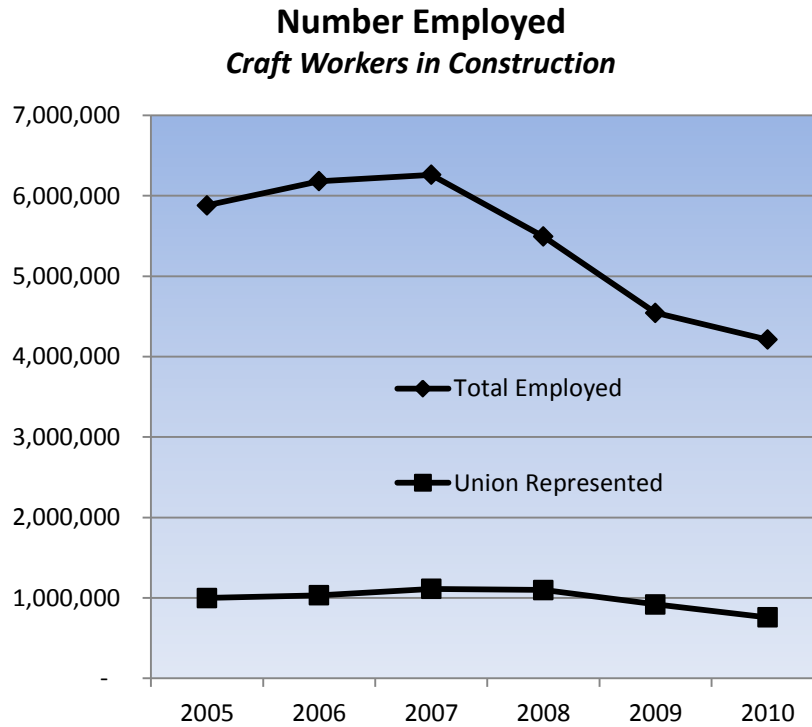
Chart 1



Looking Beyond Market Share

Chart 2 shows that although the *percent* of union represented craft workers in the construction industry has remained relatively stable over time, since 2008 the total *number* of workers declined by 23 percent, or 1.3 million. Moreover, the union represented worker count declined by 31 percent or 342,000 during this time frame. Thus, although union market share is about the same as it was four year ago, the number of union workers has declined, and has declined substantially during this time.

Chart 2



Regional Variation

Charts 3 through 6 show the regional variation in union market share for craft workers in the construction industry. From 2008 to 2010, market share declined in every region except the Middle Atlantic.

Chart 3

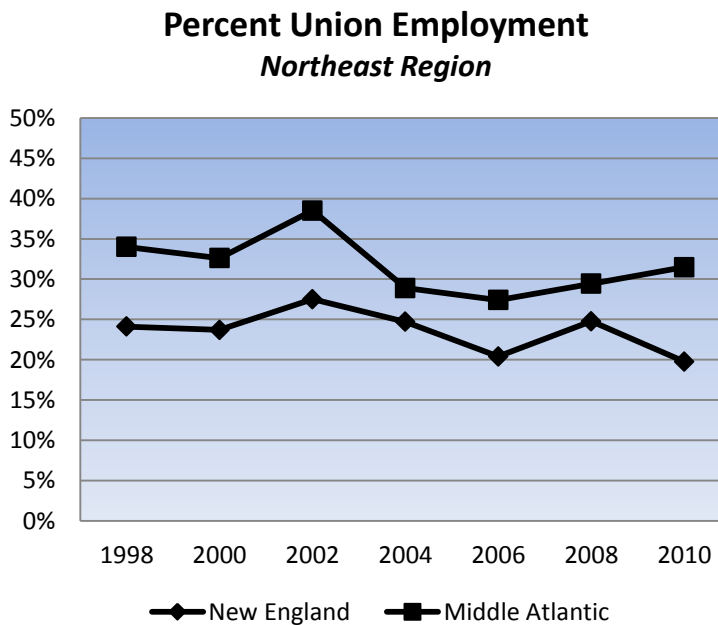


Chart 4

Percent Union Employment South Region

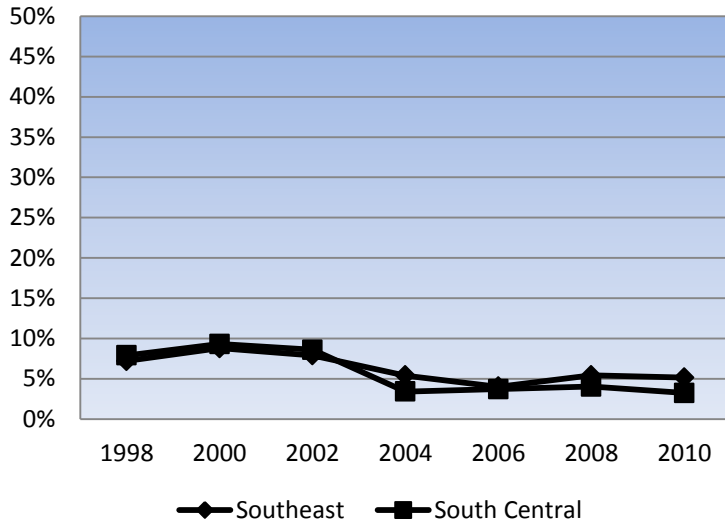


Chart 5

Percent Union Employment North Central Region

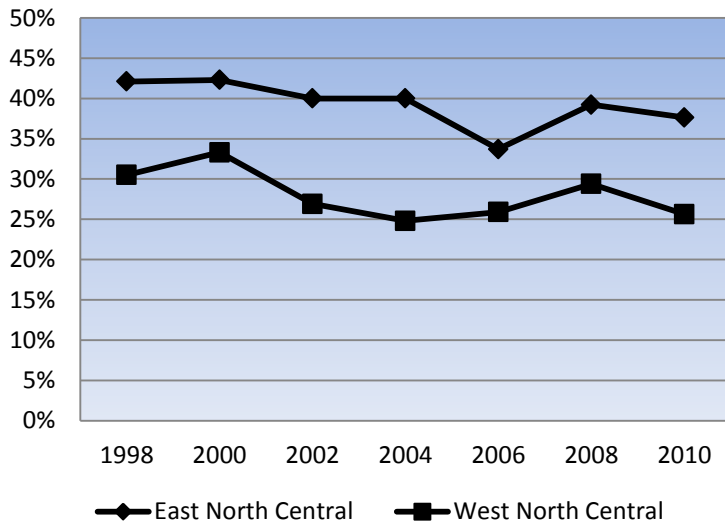


Chart 6

Percent Union Employment *West Region*

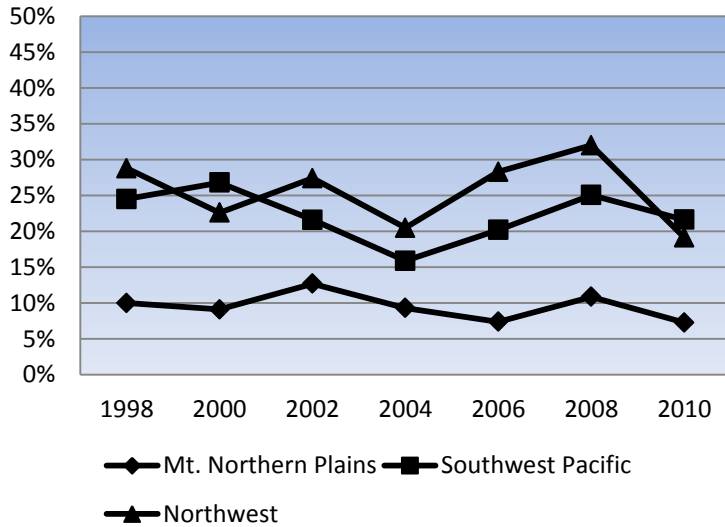
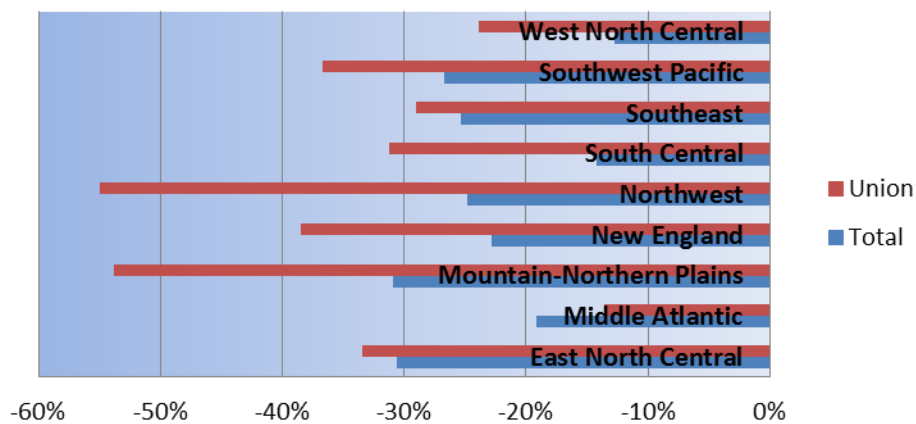


Chart 7 shows greater detail behind these regional market share numbers. It shows the change in total employment and union employment from 2008 to 2010. Not only did union employment decline, it declined at a faster rate than the total employment for every region except the Middle Atlantic.

Chart 7

Percent Change in Employment by Region: 2008 to 2010



Summary

In order to evaluate union/non-union employment it is important to look at both market share and actual employment numbers to gain an understanding of market forces. The recession that began in 2008 and the ensuing downturn in the construction industry are reflected poignantly in these employment figures. Both union and non-union craft workforces in construction have sustained substantial losses, with the union sector bearing the largest brunt of this decline.

Regions

New England

Connecticut
Maine
Massachusetts
New Hampshire
Rhode Island
Vermont

East North Central

Illinois
Indiana
Michigan
Minnesota
Ohio
West Virginia
Wisconsin

Mountain-Northern Plains

Colorado
Montana
North Dakota
South Dakota
Utah
Wyoming

Middle Atlantic

District of Columbia
Delaware
Maryland
New Jersey
New York
Pennsylvania

West North Central

Iowa
Kansas
Missouri
Nebraska

Southwest Pacific

Arizona
California
Hawaii
Nevada

Southeast

Alabama
Florida
Georgia
Kentucky
Mississippi
North Carolina
South Carolina
Tennessee
Virginia

South Central

Arkansas
Louisiana
New Mexico
Oklahoma
Texas

Northwest

Alaska
Idaho
Oregon
Washington

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