



AGC
THE CONSTRUCTION
ASSOCIATION

Data Digest

WWW.AGC.ORG

Vol. 25, No. 9

March 17-21, 2025

Two-thirds of states, half of metros add construction jobs in January; flurry of tariffs causes confusion

Seasonally adjusted **construction employment** rose year-over-year (y/y) from January 2024 to January 2025 in 34 states and the District of Columbia, declined in 15 states, and was unchanged in Maine, according to AGC's [analysis](#) of Bureau of Labor Statistics data [posted](#) on Monday. Texas added the most construction jobs (19,800 or 2.4%), followed by Florida (10,700, 1.7%), Ohio (8,400, 3.5%), South Carolina (8,100, 7.0%), and Idaho (7,700, 11%). Idaho had the largest percentage increase, followed by Kansas (8.5%, 5,700 jobs), South Carolina, and Mississippi (6.7%, 3,300). California lost the most jobs (-27,600, -3.9%), followed by New York (-11,700, -3.0%), Arizona (-7,700, -3.4%), Massachusetts (-6,700, -3.9%), and Maryland (-6,000, -3.0%). Maryland had the largest percentage loss, followed by Massachusetts, Arizona, West Virginia (-3.2%, -1,100), and Iowa (-3.2%, -2,700). **For the month**, 23 states added construction jobs, 21 states lost jobs, and there was no change in six states and D.C. Utah added the most jobs (3,300 or 2.4%), followed by Idaho (3,000, 4.0%), South Carolina (1,800, 1.5%), and Mississippi (1,800, 3.6%). Idaho had the largest percentage gain, followed by Mississippi and Utah. Florida lost the most jobs for the month (-5,100 jobs or -0.8%), followed by Virginia (-2,900, -1.3%), Colorado (-2,400, -0.3%), and New York (-2,400, -0.6%). Arkansas had the largest percentage job loss (-1.6%, -1,100), followed by 1.3% losses in Virginia, Colorado, Rhode Island (-300 jobs), and Connecticut (-800). (For D.C., Delaware, and Hawaii, BLS posts combined totals for mining, logging, and construction; AGC treats the changes as all from construction.)

Construction employment, not seasonally adjusted, rose y/y from January 2024 to January 2025 in 189 (53%) of the 360 **metro areas** (including divisions of larger metros) for which BLS [posts](#) construction employment data, fell in 104 (29%), and was unchanged in 67, according to an [analysis](#) AGC released today. (For most metros, BLS posts only combined totals for mining, logging, and construction; AGC treats these totals as construction-only.) The largest job gains were in Boise, Idaho (4,400 combined jobs, 13%), followed by Dallas-Plano-Irving (4,300 construction jobs, 3%) and Houston-Pasadena-The Woodlands (4,000 construction jobs, 2%). Kokomo, Ind. had the largest percentage gain (38%, 600 combined jobs), followed by Battle Creek, Mich. (19%, 300 combined jobs) and Anniston-Oxford, Ala (17%, 200 combined jobs). The largest losses occurred in the Los Angeles-Long Beach-Glendale division (-7,800 combined jobs, -5%), followed by Riverside-San Bernardino-Ontario, Calif. (-6,500 construction jobs, -6%) and New York City (-4,700 combined jobs, -3%). The largest percentage loss was in Elizabethtown, Ky. (-39%, -1,200 combined jobs), followed by Cleveland, Tenn. (-15%, -400 combined jobs). BLS made annual benchmarking revisions to past state and metro data but also added, renamed, or reclassified some metro areas and removed some from publication.

There is confusion and uncertainty over items, parts, and derivative products subject to recently imposed **tariffs** of 10% on all imports from China (effective March 4, following earlier 10% tariffs on February 4); 25% on many items from Canada and Mexico (March 4, 10% on oil and gas); and 25% on all steel and aluminum (March 12). Readers are invited to send examples of **tariff-related costs or delays** to ken.simonson@agc.org and to [view](#) AGC's **Tariff Resource Center**.

The **value of construction starts**, not seasonally adjusted, fell 19% y/y in February and 24% year-to-date (YTD) in the first two months of 2025 compared to January-February 2024, construction data provider ConstructConnect [reported](#) today. **Nonresidential building starts** fell 24% y/y and 30% YTD, with commercial down 27% YTD, institutional down 13%, and industrial (manufacturing) down 79%. **Heavy engineering (civil) starts** rose 11.5% y/y but declined 6.1% YTD, with roads/highways up 0.4% YTD, water/sewage up 7.0%, bridges up 42%, and power and miscellaneous civil down 53%. **Residential starts** plunged 31% y/y and 33% YTD, with single-family down 9.4% YTD and multifamily down 62%.

Housing starts (units) in February jumped 11% for the month at a seasonally adjusted annual rate, reversing a similar decline in January, the Census Bureau [reported](#) on Tuesday. Starts slipped 2.9% y/y. Single-family starts rose 11% for the month but fell 2.3% y/y. Multifamily (five or more units) starts rose 12% for the month but fell 6.6% y/y. **Residential permits** slid 1.2% for the month and 6.8% y/y. Single-family permits declined 0.2% and 4.3%, respectively. Multifamily permits slumped 4.3% and 16%, respectively.

The **Architecture Billings Index (ABI)** dipped from 45.6 in January, seasonally adjusted, to 45.5 in February, the American Institute of Architects [posted](#) on Wednesday. The index is "a leading economic indicator of construction activity, providing an approximately 9- to 12-month glimpse into the future of nonresidential construction spending activity." The ABI is derived from the share of responding architecture firms that report a gain in billings compared to the previous month less the share reporting a decline in billings, presented on a 0-to-100 scale, with. Any score below 50.0 indicates decreasing business conditions. An index tracking **new design contracts** registered 42.0, the 12th-straight reading below 50.

Data DIGest is a weekly summary of economic news. Sign up [here](#). Editor: Ken.Simonson@agc.org, Chief Economist, AGC. Go here for [Ken's PPT](#) or [more construction data](#).

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