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Construction jobs shrink in 26 states and D.C. in June; PPI accelerates; Fed notes tariff impacts

Seasonally adjusted **construction employment** fell from May to June in 26 states and the District of Columbia, rose in 21 states, and was flat in Hawaii, Mississippi, and New Hampshire, according to AGC's [analysis](#) of Bureau of Labor Statistics (BLS) data [posted](#) today. It was the first time since April 2024 that a majority of states shed construction jobs. Texas lost the most construction jobs (-4,100 or -0.5%), followed by Maryland (-2,400, -1.5%), Florida (-1,600, -0.2%), and Nevada (-1,500, -1.4%). South Dakota lost the highest percentage (-1.6%, -500), followed by Maryland and Nevada. California added the most (3,800 jobs or 0.4%), followed by North Carolina (2,300, 0.8%), Minnesota (2,200, 1.6%), and Wisconsin (2,100, 1.5%). Montana had the largest percentage gain (1.9%, 700), followed by Minnesota and Wisconsin. **Over 12 months** 33 states and D.C. added construction jobs, while 17 states shed jobs. Texas added the most (20,900 or 2.4%), followed by Ohio (17,700, 7.2%) and Michigan (11,000, 5.6%). New Mexico had the largest percentage gain (14.8%, 7,900), followed by West Virginia (8.6%, 2,900), Idaho (8.1%, 5,800), and Ohio. Washington lost the most (-11,300, -5.0%), followed by California (-9,700, -1.1%) and New York (-8,500, -2.2%). Washington had the largest percentage loss, followed by New Jersey (-4.8%, -6,300) and Nevada (-3.5%, -3,900). (For D.C., Delaware, and Hawaii, BLS posts combined totals for mining, logging, and construction; AGC treats the changes as all from construction.)

Input prices for new nonresidential construction rose 0.2% in June, not seasonally adjusted, and 2.3% year-over-year (y/y), according to producer price index (PPI) data BLS [posted](#) on Wednesday. AGC posted [tables](#) and [charts](#) of PPI changes relevant to construction. The y/y change was the largest since February 2023. There were notable y/y increases in the PPIs for aluminum mill shapes (6.3%) and steel mill products (5.1%, including jumps of 22.5% for fabricated structural metal for bridges and 8.3% for bar joists and rebar). PPIs are based on domestic producers' prices but these increases likely reflected reactions to the 50% **tariffs** on imported steel and aluminum that took effect on June 4. Numerous tariff increases for countries that supply construction materials and equipment have been announced to take effect on August 1: Brazil, 50%; Canada, 35%; European Union and Mexico, 30%; Japan and Korea, 25%; and copper from all countries, 50%. **Readers are invited to consult AGC's Tariff Resource [Center](#) for the latest details and to send information about project timing, materials price changes, and supply chains to ken.simonson@agc.org.**

"**Economic activity** increased slightly from late May through early July," the Federal Reserve [reported](#) on Wednesday in its latest Beige Book, which "characterizes regional economic conditions and prospects based on a variety of mostly qualitative information, gathered directly from" sources in the 12 Fed districts. "**Construction activity** slowed somewhat, constrained by rising costs in some districts.... In all 12 districts, businesses reported experiencing modest to pronounced input **cost pressures related to tariffs, especially** for raw materials used in manufacturing and **construction.**" AGC [posted](#) construction-related excerpts from each district.

"The first year of **new settlements** [wages, health and welfare, retirement, apprentice, and other employer payments] reached from January through June of 2025...**for union craft workers in the construction** industry had an average [mean] increase of 4.7%," the Construction Labor Research Council (CLRC) [reported](#) on Tuesday. "From 2020 to 2023, increases rose sharply...going from 2.8 to 4.7% in just three years. In the two years following 2023, the average percentage increase for settlements remained consistent at 4.6/4.7%." Among six regions, the median increase ranged from 4.3% in the East North Central region to 5.7% in the Northwest. Among 15 crafts, the median increase ranged from 3.7% for iron workers to 5.8% for insulators. "The average **total package increase...for all contract years** for union crafts in construction was 3.9%. CLRC projects increases to reach approximately 4.1% by 2027. These results include those from all years of active settlements (e.g., previous years such as 2023 and 2024 as well as future years)."

Housing starts (units) in June rose 4.6% for the month at a seasonally adjusted annual rate but dipped 1.0% for the first six months of 2025 year-to-date (YTD) compared to January-June 2024, the Census Bureau [reported](#) today. Single-family starts fell 4.6% for the month and 6.9% YTD. Multifamily (five or more units) starts soared 31% from May and 16% YTD. **Residential permits** edged up 0.2% for the month but fell 3.2% YTD. Single-family permits declined 3.7% and 5.5%, respectively. Multifamily permits climbed for the third-straight month, by 8.1% from May and 1.0% YTD.

Contractors are invited to complete the AGC/NCCER Workforce [Survey](#) by August 15.

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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