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Minority of states add construction jobs in July; tariff complexity spreads; ConstructConnect starts inch up

Seasonally adjusted **construction employment** fell from June to July in 22 states, rose in 22 states, and was flat in six states and the District of Columbia, according to AGC's [analysis](#) of Bureau of Labor Statistics (BLS) data [posted](#) on Tuesday. California experienced the largest decline in construction from June to July (-3,300 jobs or -0.4%), followed by New Jersey (-1,600, -1.0%), Missouri (-1,500, -1.0%), and Ohio (-1,400, -0.5%). Wyoming lost the highest percentage for the month (-3.4%, -800 jobs), followed by North Dakota (-2.0%, -600), New Jersey, Missouri, and Oklahoma (-0.9%, -800). Colorado added the most construction jobs for the month (3,800 jobs or 2.1%), followed by Oregon (2,900, 2.6%), Illinois (2,900, 1.2%), Texas (2,800, 0.3%), and Georgia (2,100, 0.9%). The largest percentage gain occurred in Oregon, followed by Arkansas (2.2%, 1,400), Colorado, and West Virginia (1.6%, 600). California lost the most **construction jobs during the past 12 months** (-18,200 jobs, -2.0%), followed by Washington (-9,600, -4.3%), New Jersey (-8,000, -4.9%), New York (-6,300, -1.6%), and Maryland (-4,100, -2.5%). The largest percentage loss was in New Jersey, followed by Washington, Arkansas (-2.7%, -1,800), Wyoming (-2.5%, -600), Vermont (-2.5%, -400) and Maryland. Texas added the most construction (27,000 jobs or 3.2%), followed by Ohio (13,600, 5.5%), Michigan (10,100, 5.1%), Virginia (10,100, 4.6%), and North Carolina (10,000, 3.7%). New Mexico had the largest percentage gain over 12 months (14.3%, 7,700), followed by West Virginia (12.3%, 4,100), Idaho (8.5%, 6,100), Alaska (7.7%, 1,400) and Kentucky (6.4%, 6,000).

Additional uncertainty and complexity regarding **tariffs** that affect construction inputs surfaced this week. The [Federal Register](#) on Tuesday [posted](#) a list of 407 items containing steel or aluminum that are subject to a 50% tariff as of August 15, even if they were on a ship that was on the water or in a U.S. port but hadn't been unloaded into a bonded warehouse. Previously, shipments in transit had a grace period. A reader shared a notice received Monday from TK Elevator Manufacturing warning that "we need to account for each individual project's tariff amount. A change order reflecting the associated cost from the factory will be sent for your review once the factory notifies our local team of the final amount for each project." **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.**

The **value of construction starts**, not seasonally adjusted, inched up 0.1% year-over-year (y/y) in July and rose 3.7% year-to-date (YTD) in the first seven months of 2025 compared to January-July 2024, ConstructConnect [reported](#) on Wednesday. Nonresidential building starts climbed 22% y/y and 15% YTD, with commercial up 17% YTD, institutional down 5.3%, and industrial (manufacturing) up 66%. Engineering (civil) starts fell 8.5% y/y but rose 4.5% YTD, with roads up 0.8% YTD, water and sewage treatment up 6.0%, bridges up 16.5%, airport up 35%, and power infrastructure down 42%. Residential starts slumped 24% y/y and 11% YTD, with single-family down 12% YTD and multifamily down 8%.

The **Architecture Billings Index (ABI)** dipped to 46.2 in July, seasonally adjusted, from 46.8 in June, 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. Any score below 50.0 indicates decreasing business conditions. Billings have declined for nine months in a row and in all but three of the last 34 months. An index of **design contract activity** registered 47.9, the 17th consecutive monthly reading below 50.

Housing starts (units) in July rose 5.2% for the month at a seasonally adjusted annual rate and 1.6% for the first seven months of 2025 YTD compared to January-July 2024, the Census Bureau [reported](#) on Tuesday. Single-family starts rose 2.8% for the month but remained 4.2% lower YTD. Multifamily (five or more units) starts climbed 12% from June and 18% YTD. **Residential permits** fell 2.8% for the month and 3.5% YTD. Single-family permits edged up 0.5% from June but fell 5.8% YTD. Multifamily permits slumped 9.9% from June but rose 1.4% YTD.