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Immigration enforcement, tariffs affect contractors, AGC-NCCER survey finds; 51% of metros add jobs

Immigration enforcement actions have directly or indirectly affected 28% of construction firms responding to the 2025 AGC of America-NCCER **Workforce Survey**, which AGC posted on Thursday and which drew 1,342 responses from member firms between July 9 and August 15. Of the 874 who responded to this question, 5% reported a jobsite or offsite was visited by immigration agents; 10% reported workers left or failed to appear because of actual or rumored immigration actions; and 20% reported their firms had not been affected directly but subcontractors lost workers. **Shortages of workers** (their own or subcontractors') was the most-cited of seven listed sources of project delays, mentioned by 45% of respondents. Similar to the 2024 survey, 67% of firms had at least one **project canceled, postponed, or scaled back** in the past six months; what was new is that 16% cited changes in demand or need for a project **due to tariffs**. In addition, 26% (up from 20% in 2024), cited changes in demand/need **due to other policy changes** (federal funding, taxes, regulations, etc.). Similar to past surveys, most firms had **openings for hourly craft workers** (88% of firms that directly hire them), while 80% had **openings for salaried positions**. In both cases, only 8% reported no difficulty filling positions. Although only 49% of firms had added to **headcount** in the past 12 months, 62% expect to do so in the next 12 months. Results are broken out by region and 21 states, three revenue size ranges, four project types, and union vs. open-shop firms.

Construction employment, not seasonally adjusted, rose from July 2024 to July 2025 **in** 184 (51%) of the 360 **metro areas** (including divisions of larger metros) for which BLS posts construction employment data, fell in 120 (33%), and was unchanged in 56, according to an analysis AGC released on Wednesday. (For most metros, BLS posts only combined totals for mining, logging, and construction; AGC treats these totals as construction-only.) For the fifth month in a row, the largest job gain was in the Arlington-Alexandria-Reston, Va.-W.Va. metro division (7,900 combined jobs or 9%), followed by Houston-Pasadena-The Woodlands (6,600 construction jobs, 3%) and Cincinnati, Ohio-Ky.-Ind. (5,100 combined jobs, 9%). The largest percentage gain, 11%, occurred in Las Cruces, N.M. (500 combined jobs); Pocatello, Idaho (300 combined jobs); and Canton-Massillon, Ohio (1,100 combined jobs). Riverside-San Bernardino-Ontario, Calif. again experienced the largest loss (-7,200 construction jobs, -6%), followed by the Los Angeles-Long Beach-Glendale division (-6,200 combined jobs, -4%) and Baton Rouge, La. (-3,900 construction jobs, -8%). The largest percentage loss again occurred in Niles, Mich. (-9%, -200 combined jobs), followed by declines of 8% in Baton Rouge; Walla Walla, Wash. (-100 combined jobs); and Pueblo, Colo. (-300 combined jobs).

The Bureau of Labor Statistics on Thursday posted its annual **projections of 10-year employment change**, covering 2024-2034. The agency projects **construction industry** employment to increase by 360,500 or 4.4%, above the 3.1% growth rate for total nonfarm payroll employment. Projected subsector employment growth rates range from 0.7% for painting and wall covering contractors to 7.9% for power and communication line and related structures construction. The **construction occupations** that are projected to add the most jobs (whether employed in construction or other sectors) are construction laborers (106,500 jobs or 7.3%), electricians (77,400, 9.5%), and first-line supervisors of construction trades and extraction workers (49,000, 5.3%), plus construction managers (48,100, 8.7%). Construction trades are projected to experience an annual separation rate of 7.7% of employment (compared to 10.6% for all occupations), with 3.1% of workers leaving the labor force and 4.7% transferring to unrelated occupations.

"Developers added 12 gigawatts (GW) of new utility-scale solar **electric generating capacity** in the United States during the first half of 2025, and they plan to add another 21 GW in the second half of the year, according to our latest survey of electric generating capacity changes," the Energy Information Administration posted on August 20. "If those plans are realized, solar would account for more than half of the 64 GW that developers plan to bring online this year. Battery storage, wind, and natural gas power plants account for virtually all of the remaining capacity additions for 2025. …If planned capacity additions for solar photovoltaic and battery storage capacities are realized, both technologies will add more capacity than in any previous year. For both technologies, this growth is largely attributable to changes occurring in Texas. About 27% (3.2 GW) of the solar capacity added so far in 2025 is in Texas, and developers plan to bring another 9.7 GW of solar online in Texas in the second half of this year. Last year, Texas surpassed California as the state with the most utility-scale solar capacity. Battery storage accounted for the second-largest share of capacity additions in the first half of the year, at 26% (5.9 GW), about half of which was in Arizona or California. Developers in Texas are expecting to bring 7.0 GW of battery storage capacity online in 2025, with much of that capacity coming online in the second half."