AGC THE CONSTRUCTION ASSOCIATION

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Construction employment rose in June in 28 states; starts climbed 11% through June, Dodge reports

Seasonally adjusted **construction employment** rose from May to June **in** 28 **states** and the District of Columbia, fell in 20 states and was flat in South Carolina and West Virginia, according to AGC's analysis of BLS data posted on Tuesday. Texas added the most construction jobs (5,200, 0.6%), followed by Ohio (3,900, 1.5%), Massachusetts (3,700, 2.2%), North Carolina (2,900, 1.0%) and Louisiana (2,000, 1.4%). The largest percentage gain occurred in New Mexico (3.2%, 1,700 jobs), followed by Massachusetts, North Dakota (2.0%, 600), Alaska (1.6%, 300) and Ohio. California lost the most construction jobs from May to June (-4,100, -0.5%), followed by New York (-3,900, -1.0%), Washington (-2,100, -1.0%) and Wisconsin (-2,100, -1.4%). The largest percentage loss was in Montana (-1.6%, -600 jobs), followed by Wisconsin, Rhode Island (-1.3%, -300), New York and Washington (both -1.0%). Between June 2025 and June 2026, 33 states and D.C. added **construction jobs year-over-year** (y/y), 14 states lost jobs and employment was unchanged in Delaware, Mississippi and North Dakota. Texas added the most construction jobs y/y (24,800, 2.7%), followed by North Carolina (15,500, 5.6%), Ohio (11,900, 4.6%), Illinois (10,700, 4.5%) and Louisiana (10,500, 7.7%). Louisiana had the largest percentage gain over 12 months, followed by D.C. (6.6%, 900 jobs), Minnesota (6.3%, 8,900) and North Carolina. California lost the most construction jobs y/y (-15,400 jobs, -1.7%), followed by Virginia (-4,600, -2.0%), New York (-4,300, -1.1%), Georgia (-4,100, -1.7%) and Michigan (-3,600, -1.8%). The largest percentage loss was in New Hampshire (-2.5%, -800 jobs), followed by Virginia, Michigan, New Jersey (-1.8%, -3,000) and Rhode Island (-1.8%, -400).

Total **construction starts** rose 11% year-to-date (YTD) in January-June 2026 compared to the same months in 2025, despite plunging 20% at a seasonally adjusted annual rate from May to June, Dodge Construction Network reported on Tuesday. "'Residential and institutional construction remain weak, while commercial, industrial and nonbuilding construction continue to show strong year-to-date growth,'" stated Sarah Martin, director of economic research. **Nonresidential building starts** rose 6.2% YTD, with commercial and industrial construction up 18% and institutional starts down 7.3%. **Residential starts** fell 3.5% YTD, with single-family starts down 7.5% and multifamily starts up 3.7%. **Nonbuilding starts** jumped 34% YTD "alongside the [120%] growth in electric power/utilities, 17.0% in miscellaneous nonbuilding and 10.8% growth in highways and bridges. Environmental public works are down 5.5%".

President Trump on Monday imposed 50% **tariffs on products from Canada, including cement**, effective August 19. The delayed effective date means the scope and rate could change before then. Although Canada accounts for only about 5% of U.S. cement consumption, usage varies considerably by state. In addition, "The new tariffs could affect building materials such as doors, heating and ventilation equipment, glass, cement and plywood products," HousingWire reported on Tuesday. Updated information will be posted on AGC's Tariff Resource Center. Readers are invited to send information about materials price changes and supply chain issues to ken.simonson@agc.org.

New **hotel project announcements** in the second quarter of 2026 "total 280 projects/33,423 rooms, up 18% in projects and 23% in rooms" y/y, hotel analytics firm Lodging Econometrics reported on Thursday. "Construction starts reach 176 projects/20,056 rooms, up 14% in projects and 17% in rooms….Conversions hit a record high…, with 1,567 projects/152,044 rooms in the pipeline, up 15% in projects and 18% in rooms….Together, hotel conversions and renovations represent 2,097 projects/255,834 rooms, with combined project counts up 7%".

The **Architecture Billings** Index (ABI) rose to 47.3 in June, seasonally adjusted, from 44.5 in May, but has remained below 50 (indicating decreasing business conditions at architecture firms) since March 2023, the American Institute of Architects reported on Wednesday. The index is "a leading economic indicator that leads nonresidential construction activity by approximately 9-12 months." The ABI is derived from the share of responding architecture firms that report a gain in billings from the previous month less the share reporting a decline, on a 0-to-100 scale. Subindexes (based on three-month moving averages) varied for practice specializations: institutional, 47.4 (down from 48.5 in May); commercial/industrial, 46.7 (up from 45.3); multifamily residential, 45.6 (down from 47.2); and mixed practices, 42.7 (down from 43.9).

Contractor readers are invited to complete the **2026 AGC/NCCER Workforce Survey** by Friday, August 14. Results will be released the week of August 31.