AGC THE CONSTRUCTION ASSOCIATION

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Construction jobs increase in 28 states in July; ConstructConnect, Dodge report varying starts

Seasonally adjusted **construction employment** rose from June to July **in** 28 **states**, fell in 18 states and the District of Columbia and was flat in Oregon, North Dakota, Delaware and Nebraska, according to AGC's analysis of BLS data posted on Aug. 21. Illinois added the most construction jobs (3,200, 1.3%), followed by Ohio (3,000, 1.1%), California (2,900, 0.3%), Florida (2,900, 0.4%) and Louisiana (2,300, 1.5%). The largest percentage gain occurred in Mississippi (1.9%, 1,000 jobs), followed by Rhode Island (1.8%, 400) and Louisiana. Texas lost the most construction jobs (-3,400 jobs, -0.4%), followed by Alabama (-2,200, -1.9%) and Washington (-2,100, -1.0%). West Virginia had the largest percentage loss (-2.8%, -1,000 jobs), followed by Alabama, D.C. (-1.4%, -200), Vermont (-1.2%, -200) and Alaska (-1.1%, -200). From July 2025 to July 2026, 36 states and D.C. added **construction jobs year-over-year** (y/y), 13 states lost jobs and employment was unchanged in Vermont. Texas added the most construction jobs y/y (17,500, 1.5%), followed by Louisiana (15,500, 11.4%), North Carolina (15,400, 5.5%), Ohio (13,700, 5.3%) and Illinois (12,700, 5.3%). Louisiana had the largest percentage gain, followed by Wyoming (6.2%, 1,400 jobs), North Carolina, Oklahoma (5.5%, 4,900) and Nebraska (5.5%, 3,500). California lost the most construction jobs y/y (-6,700, -0.7%), followed by Virginia (-5,800, -2.5%), New York (-5,700, -1.5%) and New Jersey (-4,900, -2,9%). Alaska had the largest percentage loss (-3.7%, -700 jobs), followed by New Jersey, Virginia, New Hampshire (-2.5%, -800) and Maine (-2.5%, -900).

For the first seven months of 2026 combined compared to January-July 2025, the **value of construction starts**, not seasonally adjusted, climbed 5.9% year-to-date (YTD) despite slumping 15% from June to July, ConstructConnect reported on Friday. **Nonresidential building starts** jumped 21% YTD, with commercial up 55% (led by a 148% leap in combined office and data center starts), institutional up 19% and industrial (manufacturing) down 32%. **Engineering (civil) starts** rose 5.7% YTD, with roads up 7.1%, water and sewage treatment up 5.6%, bridges up 19%, dams, canals and marine work up 25%, electric power infrastructure up 3.0% and airports down 36%. **Residential starts** slumped 17% YTD, with single-family down 21% and apartments down 12%. For the month, gains were limited largely to manufacturing, driven mainly by "'the $25 billion Micron chip fabrication plant. However, in the year through July, manufacturing overall continues to drag,'" Chief Economist Michael Guckes stated.

Total **construction starts** "popped" 56% at a seasonally adjusted annual rate from June to July and rose 17% YTD, Dodge Construction Network reported on Aug. 21. **Nonresidential starts** rose 22% YTD, with commercial and industrial construction up 44% and institutional starts down 3.5%. **Nonbuilding starts** improved by 30%, with electric power/utilities up 32%, miscellaneous nonbuilding up 43%, highways and bridges up 6.8% and environmental public works down 4.8%. **Residential starts** were down 1.7% YTD, with single-family down 6.1% and multifamily up 6.4%.

"**Commercial real estate property** type trends are quite different, with low supply allowing retail and hotel to do well, while oversupply continues to hurt industrial and apartment," the Mueller Real Estate Market Cycle Monitor for the second quarter of 2026 reported on Saturday. "Office is finally climbing out of a long demand slump….The cycle monitor analyzes occupancy movements in five property types in 55 [metropolitan statistical areas]. Market cycle analysis should enhance investment-decision capabilities for investors and operators. The five property type cycle charts summarize almost 300 individual models that analyze occupancy levels and rental growth rates to provide the foundation for long-term investment success."

The **Architecture Billings** Index (ABI) slipped to 46.6 in July, seasonally adjusted, from 47.3 in June and has been below 50 (indicating decreasing business conditions at architecture firms) since March 2023, the American Institute of Architects reported on Wednesday. "This ongoing slump in business conditions has now stretched to nearly [3-1/2] years, the longest in the ABI's history." 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: multifamily residential, 48.4 (up from 48.2 in June); institutional, 47.4 (up from 46.0); commercial/industrial, 46.7 (down from 47.3); and mixed practices, 43.2 (up from 42.7).

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