



AGC
THE CONSTRUCTION
ASSOCIATION

Data Digest

WWW.AGC.ORG

Vol. 25, No. 13 April 14-21, 2025

Jobs increase in 31 states; tariffs drive pricing announcements; starts slump, ConstructConnect says

Seasonally adjusted **construction employment** rose year-over-year (y/y) from March 2024 to March 2025 in 31 states and the District of Columbia and declined in 19 states, according to AGC's [analysis](#) of Bureau of Labor Statistics data [posted](#) on Friday. Texas added the most construction jobs (28,700 or 3.4%), followed by Ohio (16,600, 6.7%) and Florida (11,400, 1.8%). New Mexico had the largest percentage increase (12%, 6,400 jobs), followed by Idaho (10.4%, 7,300 jobs), Kentucky (8.0%, 7,500), and Ohio. California lost the most jobs (-23,400, -2.6%), followed by Washington (-11,900, -2.5%), New York (-9,700, -2.5%) and Massachusetts (-7,100 -4.1%). Washington had the largest percentage loss, followed by Iowa (-3.2%, -2,700) and Massachusetts. **For the month**, 30 states added construction jobs, 17 states and D.C. lost jobs, and there was no change in New Mexico, Idaho, and Kansas. Texas added the most jobs (8,500 or 1.0%), followed by Virginia (7,200, 3.3%), and Kentucky (3,500, 3.6%). Kentucky had the largest percentage gain, followed by Montana (3.4%, 1,200) and Virginia. California lost the most jobs for the month (-3,700, -0.4%), followed by Massachusetts (-22,000, -1.3%) and Mississippi (-1,800, -3.4%). Mississippi had the largest percentage job loss (-1.6%, -1,100), followed by Maine (-1.7%, -600), Massachusetts, and North Dakota (-1.3%, -400). (For D.C., Delaware, and Hawaii, BLS posts combined totals for mining, logging, and construction; AGC treats the changes as all from construction.)

Price-change announcements, often citing **tariffs**, are flooding into contractors' inboxes. Plumbing distributor Ferguson on Tuesday sent a list of increases of up to 90%, some effective immediately. Honeywell Building Automation Americas on April 14 imposed a "tariff surcharge of 4.2% on all products, except software," beginning that day. Star Pipe Products on April 8 wrote, "Due to recently implemented tariffs we are announcing an increase [of 12-20%] for Import: Fittings, Joint Restraint Products, Accessories, Fabrication Products and Castings," effective April 9. "When asked about the impact of tariffs on their business, 60% of [home] builders reported their suppliers have already increased or announced increases of material prices due to tariffs," the National Association of Home Builders (NAHB) [posted](#) on Wednesday. "On average, suppliers have increased their prices by 6.3% in response to announced, enacted, or expected tariffs." One site that [posts](#) notices is maintained by Foundation Building Materials. In contrast, safety-gear maker Moldex wrote, "we will not be increasing our prices due to tariffs." More detail on tariffs is at AGC's [Tariff Resource Center](#). Readers are invited to send examples of **materials price announcements or project delays and cancellations** to ken.simonson@agc.org.

The **value of construction starts**, not seasonally adjusted, fell 19% y/y in March and 24% year-to-date (YTD) in the first three months of 2025 compared to January-March 2024, construction data provider ConstructConnect [reported](#) on Thursday. **Nonresidential building starts** fell 18% y/y and 22% YTD, with commercial down 20% YTD, institutional down 15%, and industrial (manufacturing) down 43%. **Heavy engineering (civil) starts** rose 53% y/y and 10.5% YTD, with roads/highways up 6.7% YTD, water/sewage up 30%, bridges up 48%, airports up 336%, and power up 173%. **Residential starts** rose 1.4% y/y but fell 18% YTD, with single-family down 6.9% YTD and multifamily down 36%.

Housing starts (units) in March declined 11% for the month at a seasonally adjusted annual rate and 1.5% for the first three months of 2025 YTD compared to January-March 2024, the Census Bureau [reported](#) on Thursday. Single-family starts sagged 14% for the month and 5.6% YTD. Multifamily (five or more units) starts were unchanged from February but rose 9.0% YTD. **Residential permits** increased 1.6% for the month but fell 3.7% YTD. Single-family permits declined 2.0% and 3.9%, respectively. Multifamily permits jumped 10% from February but were down 4.9% YTD.

Population "in the nation's 387 **metro areas** rose by nearly 3.2 million (1.1%) between 2023 and 2024, slightly outpacing U.S. population growth over the same period (1.0%)," Census [posted](#) on Thursday. "Approximately 88% gained population between 2023 and 2024. That's up from around 64% between 2020 and 2021." Conversely, growth in nonmetro areas slowed sharply, after outpacing metro growth during the pandemic, when "reduced net international migration (immigration minus emigration) and a loss of almost 200,000 between 2020 and 2021 from net domestic outmigration also curtailed the collective growth of metro areas. In the years since, the pace of population growth in metro areas has picked up because of recent increases in net international migration and rising natural increase (more births than deaths). These changes offset net domestic outmigration from metro areas as a whole." However, a near-halt to net immigration since June may reverse the population growth in many metro areas, with implications for both construction labor supply and demand.

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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