

WESTERN AEC

Market Pulse

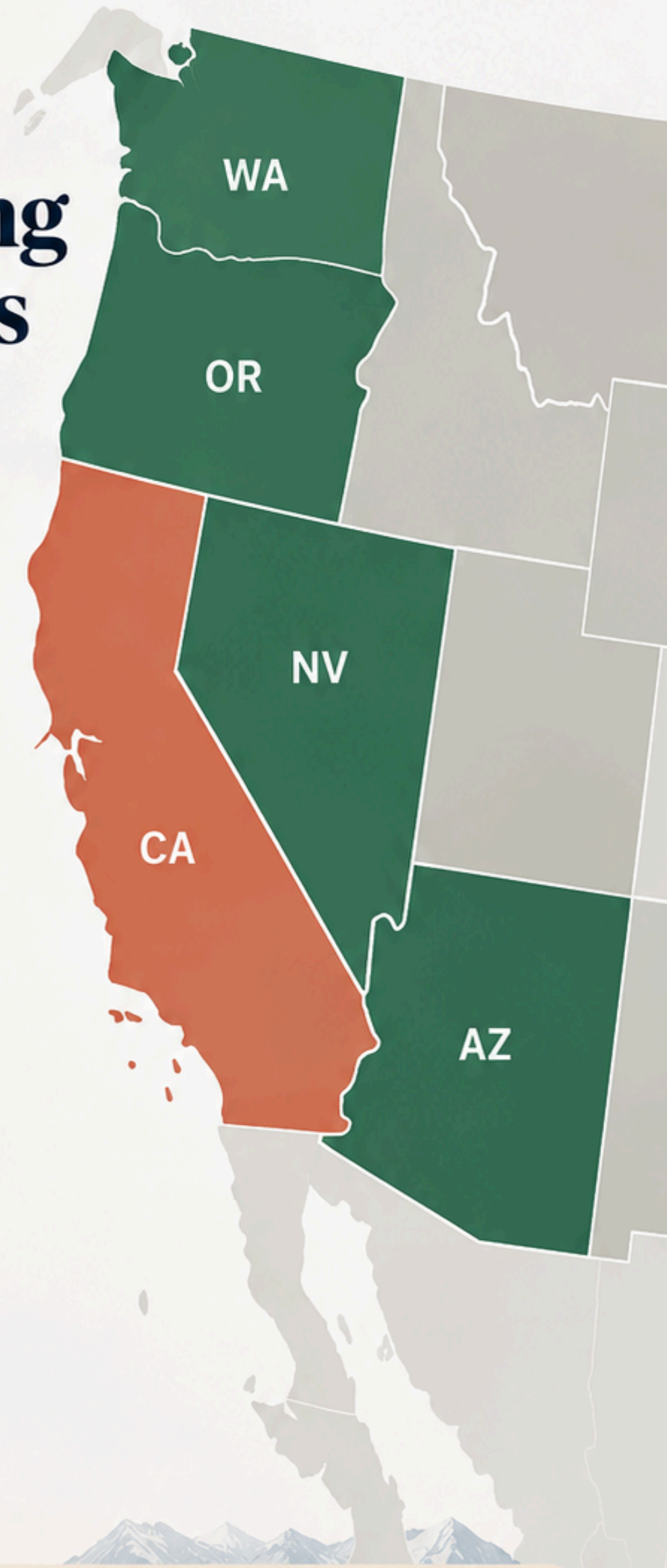
The Western AEC Market Is Splitting in Two.

What the latest construction
employment data means for
hiring across the West.

Construction employment is moving in different directions across the West.

Year-over-year change in construction employment (seasonally adjusted)

↑	Nevada 116,800 construction jobs (+3,600 jobs YoY)	+3.2%
↑	Arizona 228,200 construction jobs (+4,900 jobs YoY)	+2.2%
↑	Oregon 113,700 construction jobs (+1,400 jobs YoY)	+1.2%
↓	California 886,200 construction jobs (-6,900 jobs YoY)	-0.8%
↓	Washington 216,000 construction jobs (-1,200 jobs YoY)	-0.6%



The signal:

This isn't a broad regional slowdown.
It's becoming a **market-selection problem**.

Where we're seeing the strongest hiring signals.



NEVADA
STRONGEST
EXPANSION SIGNAL
IN THE REGION



Industrial



Power



Infrastructure



Data Centers

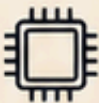


Logistics

Northern Nevada industrial, logistics, data-center and power contractors. Selectively pursue Las Vegas megaprojects, transportation and hospitality infrastructure.



ARIZONA
INDUSTRIAL-MARKET
OPPORTUNITY



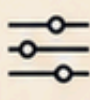
Semiconductors



Advanced
Manufacturing



Electrical /
Mechanical



Controls



Utility
Coordination

Arizona's +2.2% annual construction employment gain supports a targeted industrial-market strategy.



OREGON
SELECTIVE
OPPORTUNITY



Utilities



Water /
Wastewater



Energy



Heavy Civil



Public Works

Positive movement supports selective recruiting rather than a broad general-market campaign.



**CALIFORNIA +
WASHINGTON**
MORE SELECTIVE
OPPORTUNITIES



Specialty
Talent



Utilities



Infrastructure



Replacement
Hiring



Awarded
Backlog

These are more selective markets where project certainty and proven backlog matter.

California added jobs overall. Construction still declined.



+39,400

total non-farm
jobs in August

vs.



-600

construction jobs
month over month



-6,900

construction jobs
year over year



What we're watching: Project certainty, awarded backlog and specialized talent. Statewide job growth doesn't mean AEC hiring is accelerating.

Data centers are changing the talent conversation.

California's new data-center framework puts greater emphasis on utility capacity, water, energy planning, entitlement and infrastructure responsibility for developers.



POWER



WATER



ENTITLEMENT



ENERGY



INFRASTRUCTURE

This creates demand beyond traditional construction delivery.

Talent to watch:

- Utility PMs
- Civil/Site Leaders
- Electrical Preconstruction
- Energy & Water Engineers
- Entitlement Managers
- Environmental Planners
- Commissioning Leaders
- Project Controls



The question isn't simply:
“Who's hiring?”

It's:

“Who has real work, where is it,
and what talent does it require?”

That's the conversation we're tracking
across the Western AEC market.