Construction activity for the health-care sector has been flat over the past four years. The lackluster performance is expected to continue this year due to lingering questions surrounding the Affordable Care Act.

The Dodge Momentum Index is a leading indicator of construction spending. The information is derived from first-issued planning reports in the Dodge Data & Analytics Reports database. The data lead the U.S. Commerce Department’s nonresidential spending by a full year. In the graph to the right, the index has been shifted forward 12 months to reflect its relationship with the Commerce data.

The index is based on seasonally adjusted data for U.S. health-care construction starts. The average dollar value of projects in 2006 serves as the index baseline.

The Dodge Index for Health-Care Construction 3/2014 – 3/2015

Dodge Retail Construction Index  (2006 = 100)

The Top Metro-Area Markets

Top 5 Design Firms

Top 5 Projects

MARKET FOCUS
HEALTH CARE

Health-Care Starts by Region
In addition to U.S. total and 2015 forecast figures

The Top Projects

Ranked by health-care construction starts 1/2014 through 3/2015

1. HKS
2. ESa
3. AECOM
4. Rafael Viñoly Architects
5. NBBJ

Top 5 Design Firms

Ranked by health-care construction starts 1/2011 through 3/2015

1. HKS
2. ESa
3. AECOM
4. Rafael Viñoly Architects
5. NBBJ

The Top Projects

Ranked by total health-care starts 1/2014 through 3/2015

$900 MILLION

PROJECT: California Pacific Medical Center
Van Ness and Geary Campus for Sutter Health
ARCHITECT: SmithGroupJJR
LOCATION: San Francisco

$800 MILLION

PROJECT: NYU Langone Medical Center,
Helen L. and Martin S. Kimmel Pavilion
ARCHITECTS: Ennead Architects/NBBJ
LOCATION: New York City

$800 MILLION

PROJECT: Kaiser Permanente San Diego Central Hospital
ARCHITECT: CO Architects
LOCATION: San Diego

$800 MILLION

PROJECT: David H. Koch Center,
New York-Presbyterian Hospital
ARCHITECTS: HOK with Pei Cobb Freed & Partners and Ballinger Associates
LOCATION: New York City

$540 MILLION

PROJECT: North Tower Expansion at Houston Methodist Hospital
ARCHITECT: WHR Architects
LOCATION: Houston

MOMENTUM INDEX EDGES HIGHER

After retreating 2.5% in March, the Momentum Index rose 0.8% in April to 122.6. Although planning activity has plateaued, the index is still up 8.5% compared to 12 months earlier.

The Dodge Momentum Index is a leading indicator of construction spending. The information is derived from first-issued planning reports in the Dodge Data & Analytics Reports database. The data lead the U.S. Commerce Department’s nonresidential spending by a full year. In the graph to the right, the index has been shifted forward 12 months to reflect its relationship with the Commerce data.

Dodge Data & Analytics tracks projects from predesign through construction to capture hard construction costs, square footage, and other key statistical information. The Top Projects are ranked on the basis of the construction cost of their health-care-related components only.