Houston Area Employment Situation

July 2026

CURRENT EMPLOYMENT AND LOCAL AREA UNEMPLOYMENT STATISTICS

Houston Job Growth Broadens Despite Typical July Pullback

Total Nonfarm

Over-the-month Change

Houston MSA Total Nonfarm employment stood at 3,497,700 in July, down -25,000 jobs over the month, or -0.7 percent on a not-seasonally-adjusted basis (see Chart 1). A year ago Houston registered an over-the-month decrease of 34,400 jobs. Historically in the month of July, Total Nonfarm has on average lost -15,600 jobs over the month, which indicates that this month's losses are substantially greater than the long-term average. Over-the-month job losses are typical in July of each year which are largely driven by seasonal declines in Local Government Educational Services, Leisure and Hospitality, and Construction.

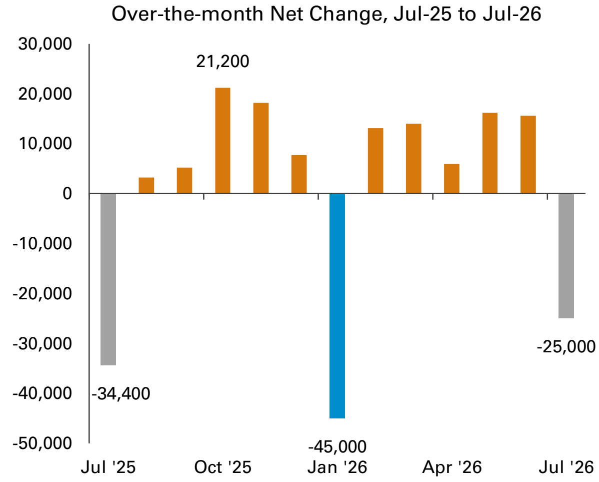
The primary drivers of this July's decline were decreases in Government; Trade, Transportation, and Utilities; and Construction. Losses were also recorded in Financial Activities, and Manufacturing. The net decrease in jobs over the month was partially offset by gains in Professional and Business Services; Private Education and Health Services; and Leisure and Hospitality. (see Chart 2). Houston MSA Total Nonfarm (seasonally adjusted) employment stood at 3,508,300, up 600 jobs over the month, or 0.0 percent vs. a historical average of 3,300. All analysis pertains to not-seasonally adjusted data unless otherwise noted. Source: BLS/TWC unless otherwise noted. NOTE: The Houston-Woodlands-Sugar Land, TX Metropolitan Statistical Area (MSA) consists of Austin, Brazoria, Chambers, Fort Bend, Galveston, Harris, Liberty, Montgomery, San Jacinto, and Waller Counties.

Top-3 Drivers of Over-the-month Job Loss in July
- Government: -23,600
- Trade, Transportation, and Utilities: -1,700
- Construction: -1,600

Over-the-year Change

Over the year, Total Nonfarm employment was up 50,300 or 1.5 percent on a not-seasonally-adjusted basis and up 40,800 or 1.2 percent on a seasonally-adjusted basis (see NSA Chart 3). To compare, July 2025 saw a year-over-year gain of 58,000 jobs (NSA) from July 2024. This was the largest over-the-year gain since July 2025's increase of 58,000 jobs. Currently 7 out of 11 sectors show growth year over year of which the top-three are Professional and Business Services (17,700);

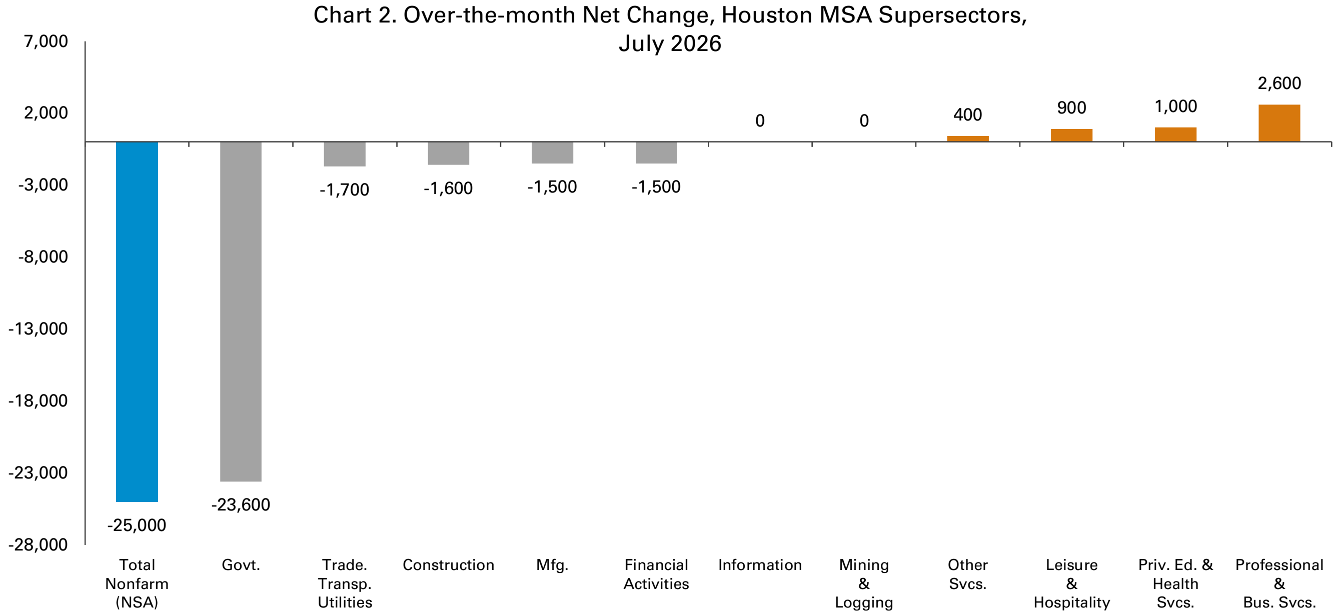
Chart 1. Total Nonfarm (NSA)
Over-the-month Net Change, Jul-25 to Jul-26



*blue bar may reflect January typical seasonal decline/gain occuring each year

Construction (13,100); and Private Education and Health Services (9,800) (see Chart 4). Total Nonfarm employment not-seasonally-adjusted now exceeds its February 2020 pre-pandemic level of 3,193,400 jobs by 304,300, or 9.5 percent (308,600 jobs, 9.6 percent above 3,199,700 seasonally adjusted).

Chart 2. Over-the-month Net Change, Houston MSA Supersectors, July 2026



Previous Month's Revisions

Total Nonfarm employment was revised upward by 1,200 jobs for a May to June larger net gain of 15,600 compared to an original estimate of 14,400 jobs. An upward revision of +3,200 jobs in Private Education and Health Services was the largest contributor followed by Financial Activities (+800) and Professional and Business Services (+200). Downward revisions in Other Services (-900), Trade, Transportation, and Utilities (-800), and Leisure and Hospitality (-700) provided a partial offset of the overall upward revision to Total Nonfarm employment (see Chart 5).

Top-3 Drivers of Over-the-year Job Growth in July
• Professional and Business Services: 17,700
• Construction: 13,100
• Private Education and Health Services: 9,800

Chart 5. Net Revisions for Selected Supersectors and Major Industries, June 2026

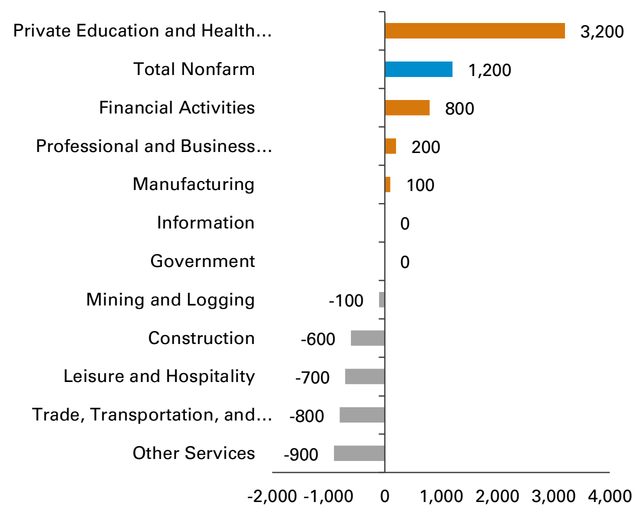


Chart 3. Total Nonfarm (NSA)
Over-the-year Net Change, Jul-11 to Jul-26

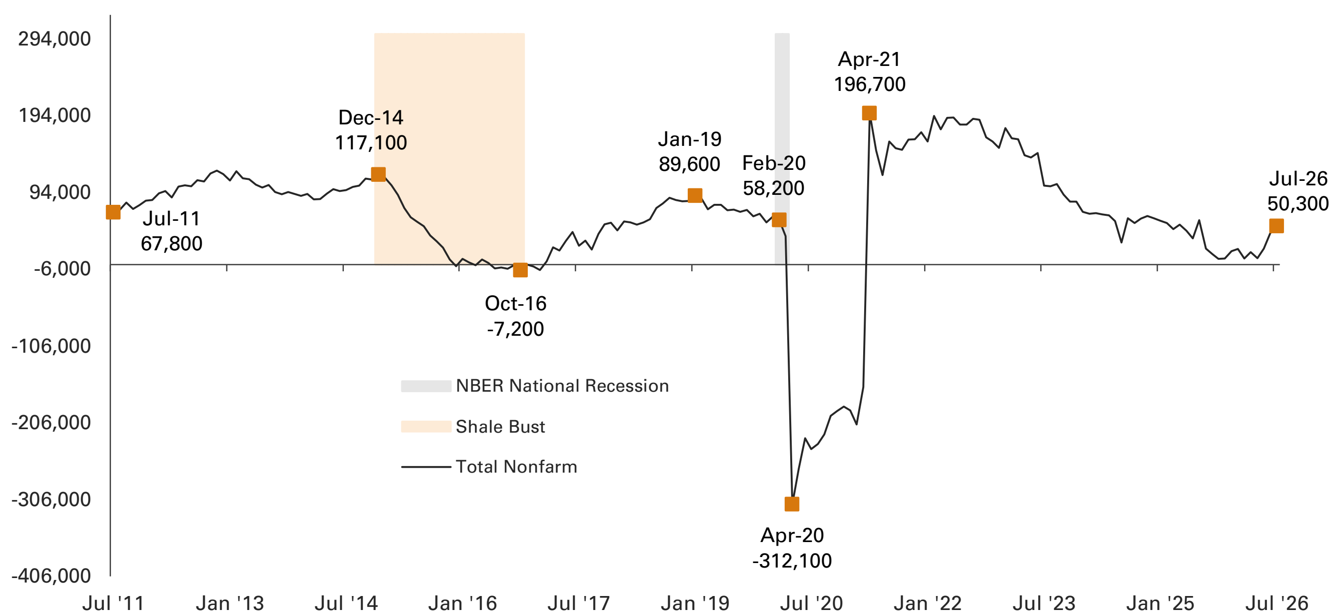
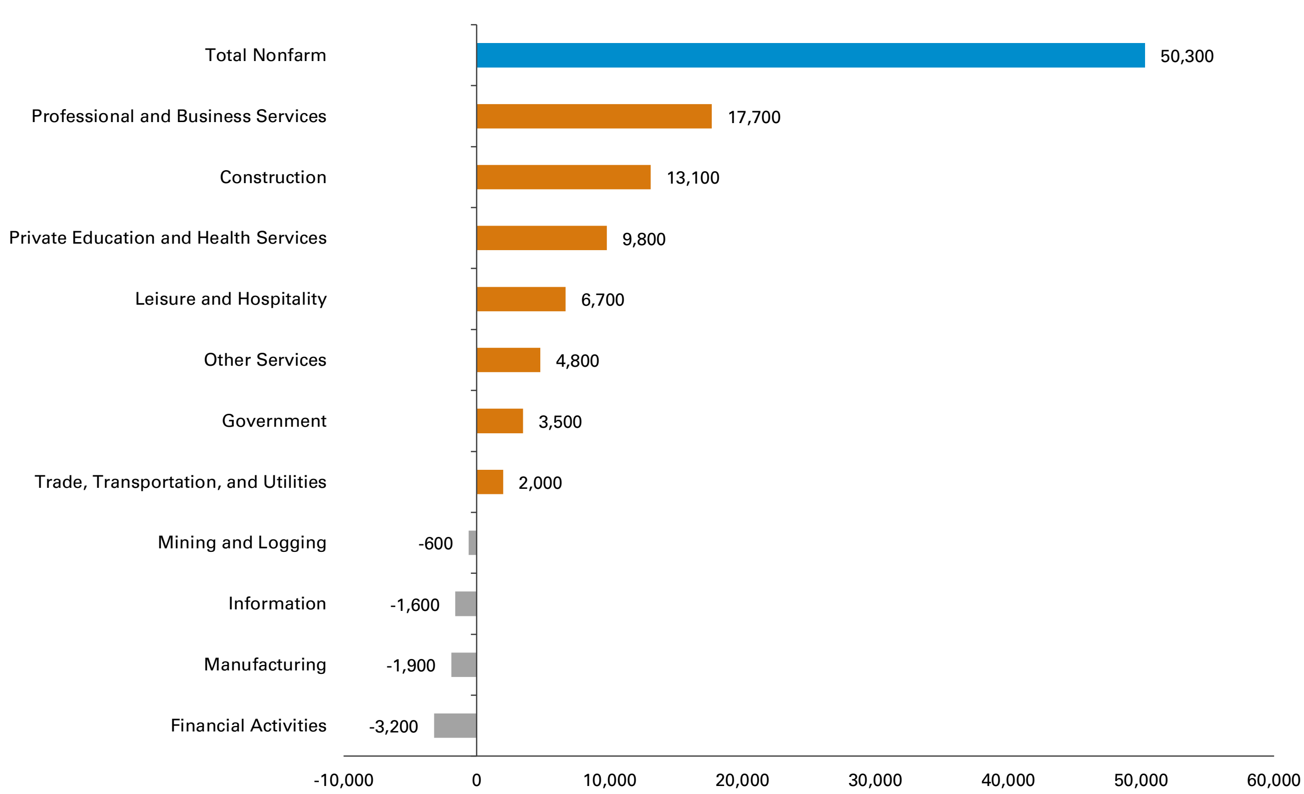


Chart 4. Over-the-year Net Change, Houston MSA Supersectors, July 2025 to July 2026



Supplemental Commentary

Houston's labor market cooled in July 2026 following two months of stronger-than-average job growth, although much of the monthly decline reflected normal seasonal patterns rather than a broad deterioration in labor demand. Total nonfarm employment declined by 25,000 jobs on a not-seasonally-adjusted basis, bringing total employment to 3.50 million. Job losses are typical in July, largely because of the summer decline in public education employment. Government alone shed 23,600 jobs this July. While this exceeds the longer-term July average, larger seasonal declines have become more common in recent years as Government employment, particularly Local Government education has grown. Government losses in July have ranged from 21,900 to 25,900 jobs since 2023, placing this year's decline broadly within the recent seasonal pattern. Excluding Government, private-sector employment declined by only 1,400 jobs, slightly better than the roughly 2,000-job decline implied by historical seasonal norms. On a seasonally adjusted basis, total employment increased by 600 jobs, suggesting that underlying hiring momentum moderated after the stronger gains recorded in May and June but remained slightly positive.

The year-over-year picture continued to improve. Houston added 50,300 jobs over the past 12 months, representing a 1.5 percent increase and the strongest annual gain since July 2025. Seven of the eleven major sectors recorded annual gains, compared with only four expanding sectors earlier in the year. However, the acceleration from the previously reported June annual gain of 39,700 jobs should be interpreted carefully. Of the 10,600-job increase between the two reports, about 9,400 reflects the difference between Houston's 34,400-job decline in July 2025 and the smaller 25,000-job decline this July, while roughly 1,200 reflects the upward revision to June employment. The seasonally adjusted data reinforce this interpretation: Houston was up 40,800 jobs, or 1.2 percent, over the year, compared with the 1.5 percent not-seasonally-adjusted headline, underscoring the role that seasonal timing and the comparison base are currently playing in the annual figure.

Importantly, the improvement is not purely statistical. Of the 9,400-job difference between this July's monthly decline and the decline in July 2025, only 2,300 jobs came from Government. The remaining 7,100-job improvement came from the private sector, where the July decline narrowed sharply from 8,500 jobs last year to just 1,400 this year. Last July's private-sector weakness was unusually pronounced, while this July was much closer to a normal seasonal pattern. This suggests that underlying private-sector conditions have genuinely improved from a year ago, even if the headline acceleration in annual growth overstates the degree of recent momentum.

Government accounted for nearly all of July's monthly job loss, shedding 23,600 jobs. Local Government drove the decline, falling by 23,100 jobs, including a 23,300-job decrease in Local Government Educational Services as schools entered the summer break. State Government also lost 800 jobs, while Federal Government added 300. As noted above, the decline is broadly consistent with the larger seasonal adjustments seen in recent years. Over the year, Government employment remained up 3,500 jobs, supported by gains in State Government (+2,800) and Local Government (+2,400), while Federal Government remained down 1,700 jobs.

Professional and Business Services provided the strongest counterweight to the seasonal losses, adding 2,600 jobs in July, more than three times its historical July average of 800. The composition of the gain was also encouraging. Professional, Scientific, and Technical Services added 2,400 jobs over the month, while Administrative and Support and Waste Management and Remediation Services added 200. Over the year, the broader sector added 17,700 jobs, or 3.1 percent, its strongest annual performance since June 2023 and the largest contribution to Houston's current job growth. Administrative and Support Services remained the main source of annual growth, adding 13,100 jobs, but Professional, Scientific, and Technical Services was also up 5,000. The stronger contribution from Professional, Scientific, and Technical Services is noteworthy given the subsector's close ties to Houston's engineering, consulting, energy, and other higher-skill business activities. After much of the sector's earlier recovery was concentrated in support-related functions, July provides some evidence that the improvement is becoming more broadly based.

Construction declined by 1,600 jobs in July, moderately larger than its typical seasonal loss of approximately 1,100. All three major subsectors contributed to the monthly decline: Heavy and Civil Engineering Construction lost 900 jobs, Specialty Trade Contractors declined by 400, and Construction of Buildings fell by 300. The monthly pullback, however, does little to change the sector's broader trajectory. Construction remained Houston's fastest-growing major sector in percentage terms, adding 13,100 jobs, or 5.2 percent, over the year. Specialty Trade Contractors accounted for 5,700 of those gains, Heavy and Civil Engineering Construction added 3,800, and Construction of Buildings added 3,600. The continued strength reflects Houston's large pipeline of industrial, infrastructure, energy-related, and population-driven construction activity.

Private Education and Health Services added 1,000 jobs in July, with Health Care and Social Assistance adding 2,300 jobs while Private Educational Services declined by 1,300 as the academic calendar moved further into the summer. The sector was up 9,800 jobs over the year, with Health Care and Social Assistance accounting for 9,400 of the increase. The July report also substantially revised June's initially reported 4,000-job decline in Private Education and Health Services to a much smaller loss of 800 jobs. That revision substantially reduces the concern raised by the preliminary June estimate and illustrates the importance of avoiding strong conclusions from a single monthly reading. Health care continues to function as one of Houston's most dependable sources of structural employment growth, supported by population growth, demographic demand, and the region's large medical infrastructure.

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Supplemental Commentary

Leisure and Hospitality also performed better than normal for July, adding 900 jobs compared with a historical average decline of roughly 1,600. Accommodation and Food Services added 500 jobs and Arts, Entertainment, and Recreation added 400. The positive July reading follows the strong event-related hiring seen in June and may partly reflect continued summer travel and residual activity associated with Houston's recent role as a host city for the FIFA World Cup. Over the year, Leisure and Hospitality employment increased by 6,700 jobs, or 1.8 percent. However, the underlying composition remains uneven: Accommodation and Food Services added 8,400 jobs over the year, while Arts, Entertainment, and Recreation remained down 1,700. Restaurants, lodging, and related visitor services therefore continue to account for the sector's improvement, while employment in entertainment and recreation remains below its year-ago level.

Trade, Transportation, and Utilities declined by 1,700 jobs in July, compared with essentially no change in a typical July. Retail Trade accounted for most of the weakness, losing 1,400 jobs, while Wholesale Trade declined by 700. Transportation, Warehousing, and Utilities moved in the opposite direction, adding 400 jobs. The annual picture remains mildly positive, with the overall sector up 2,000 jobs from July 2025. Transportation, Warehousing, and Utilities accounted for 2,700 of those gains, while Retail Trade was essentially flat and Wholesale Trade remained down 800.
Other Services added 400 jobs in July, in contrast to its typical seasonal decline of approximately 200. More importantly, the sector was up 4,800 jobs, or 3.7 percent, over the year, its strongest annual gain since late 2024 and the second-fastest percentage growth among expanding sectors. While detailed monthly subsector information is not available at the metro level, the continued improvement suggests that locally oriented demand for repair, personal, household, civic, and related services has strengthened alongside the broader regional economy.

Manufacturing weakened in July, losing 1,500 jobs compared with an average July decline of only about 300. Durable Goods accounted for 900 of the monthly loss, while Nondurable Goods declined by 600. The payroll data are broadly consistent with the July ISM-Houston Business Report, which showed the Houston manufacturing sector contracting for the second time in six months, with the manufacturing index falling further below the expansion threshold. The weakness was particularly pronounced in Durable Goods, where survey respondents reported significant contraction in sales and new orders, production, employment, lead times, and finished-goods inventories. Nondurable Goods, by contrast, continued to report modest overall expansion, supported by sales, production, and purchasing activity, although its employment indicator remained notably weak. This divergence suggests that activity in Houston's petrochemical and other nondurable industries may be holding up better than payroll employment. Over the year, Manufacturing employment remained down 1,900 jobs, with a 3,500-job decline in Nondurable Goods more than offsetting a 1,600-job increase in Durable Goods. The contrast between annual payroll growth in Durable Goods and the more recent deterioration reported by the ISM survey warrants attention, as the survey may be capturing changes in business conditions before they are fully reflected in employment data.

Mining and Logging employment was unchanged in July and remained down 600 jobs, or 0.8 percent, over the year, with Oil and Gas Extraction accounting for essentially all of the annual decline. The sector has improved considerably from the larger year-over-year losses recorded earlier in 2025 and 2026, but employment remains approximately 5,000 jobs below its February 2020 level. Taken alone, the payroll data suggest stabilization rather than a meaningful recovery. However, other indicators point to stronger underlying energy activity. The July ISM-Houston Business Report showed Oil and Gas Exploration and key support services moving into significant expansion for the first time in five months. Texas crude oil production also remained near record levels at about 5.8 million barrels per day, while marketed natural gas and natural gas liquids were at or near record highs. Information was also unchanged over the month but remained down 1,600 jobs, or 5.5 percent, over the year, making it the fastest-declining major sector in percentage terms.

The cyclical backdrop has also shifted considerably. Entering 2026, the prevailing outlook was for WTI prices around $60 or below, close to or below the level needed to justify drilling new wells for many operators, reinforcing caution around capital spending. The Middle East conflict and disruption through the Strait of Hormuz pushed prices sharply higher, but producers initially hesitated to respond because of uncertainty over how long the increase would last. As elevated prices persisted, that calculus began to change. Dallas Fed surveys indicated that smaller producers were increasingly considering adding rigs and some larger independents were accelerating drilling schedules. By mid-July, the Texas rig count had risen to 274, its highest level since April 2025, while broader energy activity in the Dallas Fed survey reached its strongest pace since 2022. These indicators suggest that the industry is beginning to respond not simply to higher spot prices, but to a growing expectation that favorable pricing conditions may persist long enough to support additional investment.

Even so, Houston is unlikely to experience the same employment response seen in earlier oil booms. Higher drilling productivity, automation, consolidation, and continued capital discipline allow producers to generate substantially more output with fewer workers. The important change is therefore at the margin: an industry that entered the year preparing for weak prices is now gradually adding rigs, advancing projects, and increasing activity. The resulting employment gains are likely to be more modest than in previous cycles and spread beyond Mining and Logging into oilfield services, engineering and technical services, construction, pipelines and LNG, petrochemicals, logistics, and other business services. In that sense, the improving energy cycle may have a broader effect on Houston's economy than upstream payroll figures alone would suggest.

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Supplemental Commentary

Information employment was unchanged in July but remained down 1,600 jobs, or 5.5 percent, over the year, making it the fastest-declining major sector in percentage terms. The continued annual decline reinforces the longer-term weakness in the sector, which remains well below its pre-pandemic employment level.

Financial Activities experienced another notable decline, losing 1,500 jobs in July despite typically adding approximately 400 jobs during the month. Real Estate and Rental and Leasing accounted for 900 of the decline, while Finance and Insurance lost 600. Over the year, the sector was down 3,200 jobs, the largest annual decline among Houston's major sectors. Finance and Insurance accounted for 2,400 of those losses, with Real Estate and Rental and Leasing down another 800. The continued weakness is consistent with the pressure that elevated borrowing costs and a slower real estate environment continue to place on interest-rate-sensitive industries. Unlike several other sectors that have begun to stabilize in recent months, Financial Activities has yet to show sustained improvement.

Houston's unemployment rate provided a somewhat more favorable signal in July. The not-seasonally-adjusted rate declined to 5.1 percent from 5.2 percent in June, although it remained above both the Texas rate of 4.8 percent and the national rate of 4.4 percent. Approximately 201,800 Houston-area residents were unemployed, down from roughly 204,400 in June but still substantially above the 185,500 unemployed residents recorded a year earlier. The decline reverses a small portion of June's seasonal increase as graduates and other summer jobseekers entered the labor market, but the year-over-year rise from 4.8 to 5.1 percent indicates that labor supply continues to run somewhat ahead of hiring demand. The Workforce Solutions Index provides a similar message. The index stood at 3.46 in July, remaining below its equilibrium value of 4.0. While hiring conditions have improved considerably from the weaker readings earlier in 2026, the index continues to indicate that the number of available workers remains relatively high compared with job opportunities.

Taken together, the July report does not reverse the improvement that emerged in late spring, but it does suggest that momentum moderated after stronger hiring in May and June. The underlying picture remains one of moderate and increasingly broad expansion. Professional and Business Services, Construction, and Health Care continue to provide the foundation for growth, while Financial Activities, Manufacturing, and Information remain areas of weakness. At the same time, improving energy indicators provide an additional potential source of support as the year progresses. August and September will be important in determining whether the broader improvement in private-sector activity can be sustained into the second half of 2026.

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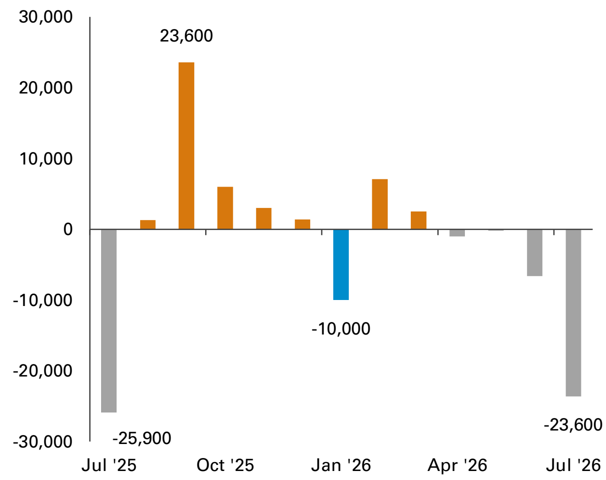
DECLINING INDUSTRY HIGHLIGHTS

Government

Over-the-month Change

Government was the largest declining sector over the month down -23,600 jobs, or -5.1 percent (see Chart 6).This was the second-largest July decline since records began in 1990 and the second-largest over-the-month decline recorded in any month during the past three decades. Historically in the month of July, Government has lost an average of -13,800 jobs over the month, which indicates that this month's losses are substantially larger than the long-term average decline. July declines in Government employment reflect the continued temporary shedding of jobs in public education prior to the start of the new academic year in late-August to early-September. Local Government was the largest contributor to the overall sector's decline, down -23,100 jobs over the month. The second-largest declining contributor was State Government, which lost -800 jobs from June to July. Lastly, Federal Government offset a portion of the sector’s losses with a gain of 300 jobs. Government employment saw no revision from May to June leaving the previous month's original decrease of -6,600 intact.

Chart 6. Government (NSA)
Over-the-month Net Change, Jul-25 to Jul-26

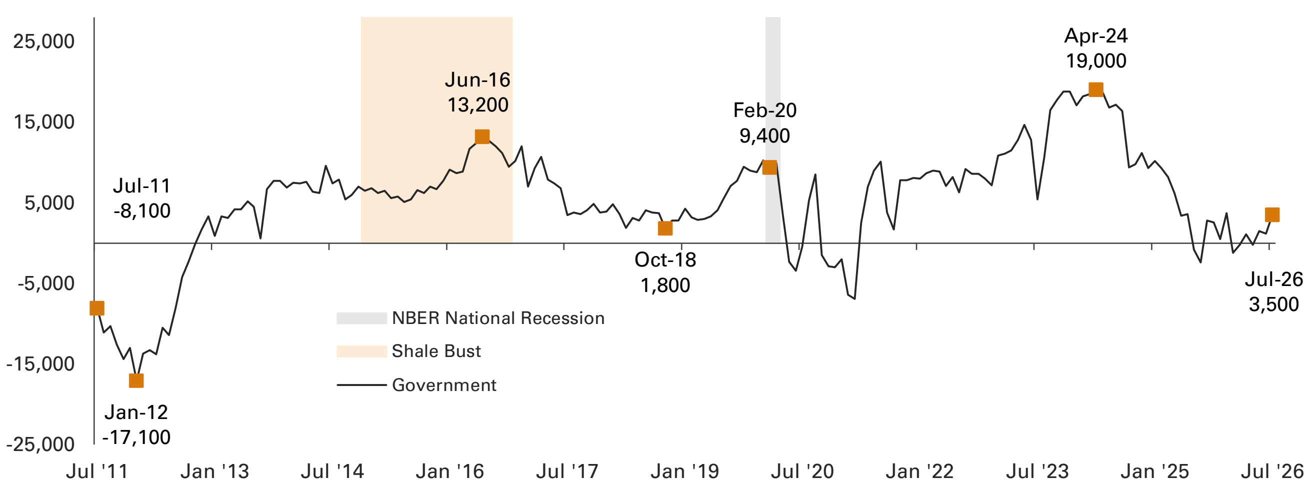


*blue bar may reflect January typical seasonal decline/gain occuring each year

Over-the-year Change

Year over year, Government was up 3,500 jobs, or 0.8 percent (see Chart 7). This was the largest over-the-year gain since December 2025's increase of 3,700 jobs. State Government was the largest contributor to the overall sector's increase, up 2,800 jobs over the year. The second-largest contributor was Local Government, which added 2,400 jobs from July a year ago. Lastly, Federal Government offset a portion of the sector’s gains with a loss of -1,700 jobs. Total Government employmnent (NSA) now exceeds its February 2020 pre-pandemic level of 429,300 jobs by 11,800, or 2.7 percent. At the same time, the sector's share of Houston area Total Nonfarm Employment has remained constant at 12.7 percent over the past year.

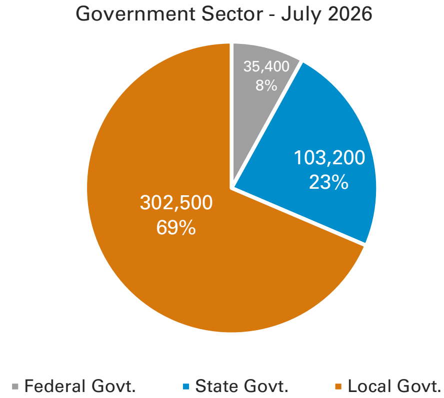
Chart 7. Government (NSA)
Over-the-year Net Change, Jul-11 to Jul-26



About This Sector

This sector consists of establishments of federal, state, and local government agencies that administer, oversee, and manage public programs and have executive, legislative, or judicial authority over other institutions within a given area that are not performed by private establishments. For MSA data, this includes public education but excludes healthcare. Of the three main component industries, Local Government accounts for the majority of the sector's employment at 69 percent (see Chart 8). Across the Houston MSA, the concentration of jobs in the overall Government sector is 10 percent less than the national average.

Chart 8. Employment in Component Industries of Government Sector - July 2026



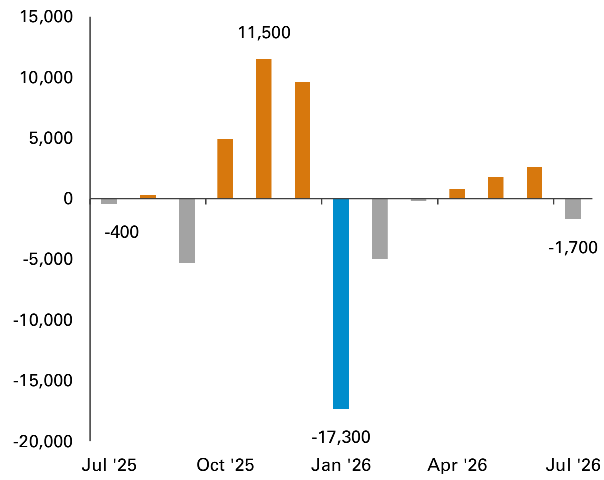
DECLINING INDUSTRY HIGHLIGHTS

Trade, Transportation, and Utilities

Over-the-month Change

Trade, Transportation, and Utilities was the second-largest declining sector over the month down -1,700 jobs, or -0.2 percent (see Chart 9). Historically in the month of July, Trade, Transportation, and Utilities has seen no change in jobs over the month, which indicates that this month's losses are substantially in contrast to the long-term average gain. Retail Trade was the largest contributor to the overall sector's decline, down -1,400 jobs over the month. The second-largest declining contributor was Wholesale Trade, which lost -700 jobs from June to July. Lastly, Transportation, Warehousing, and Utilities offset a portion of the sector's losses with a gain of 400 jobs. Trade, Transportation, and Utilities employment was revised downward by -800 jobs for a May to June smaller net gain of 2,600 compared to an original estimate of 3,400 jobs.

Chart 9. Trade, Transportation, and Utilities (NSA) Over-the-month Net Change, Jul-25 to Jul-26

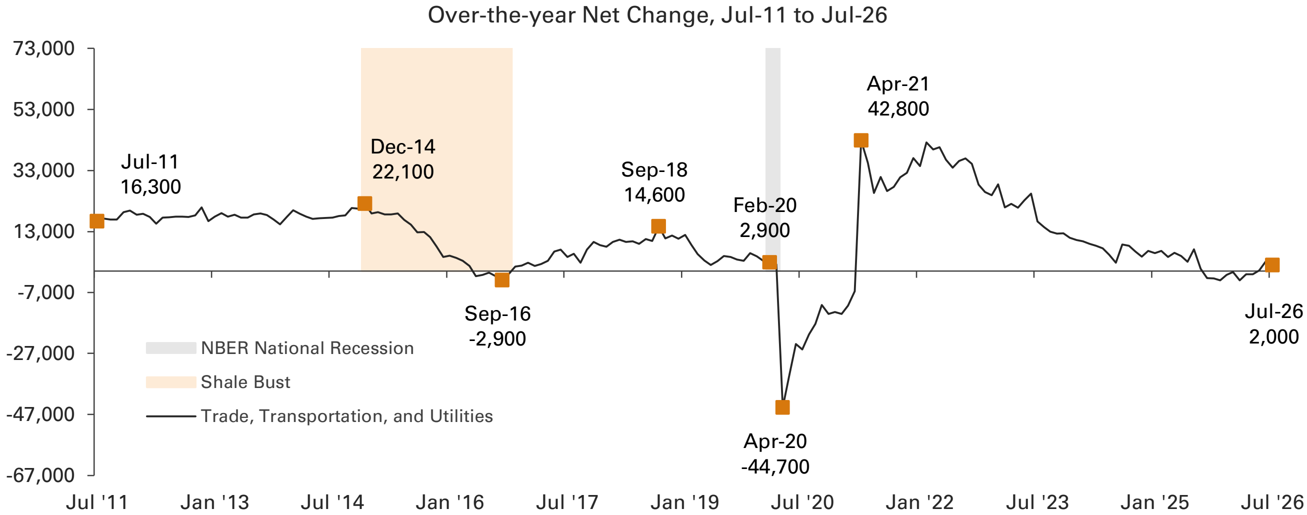


*blue bar may reflect January typical seasonal decline/gain occuring each year

Over-the-year Change

Year over year, Trade, Transportation, and Utilities was up 2,000 jobs, or 0.3 percent (see Chart 10). Transportation, Warehousing, and Utilities was the largest contributor to the overall sector's increase, up 2,700 jobs over the year. The second-largest contributor was Retail Trade, which added 100 jobs from July a year ago. Lastly, Wholesale Trade offset a portion of the sector's gains with a loss of -800 jobs. Total Trade, Transportation, and Utilities employmnent (NSA) now exceeds its February 2020 pre-pandemic level of 628,700 jobs by 68,600, or 10.9 percent. At the same time, the sector's share of Houston area Total Nonfarm Employment has fallen from 20.2 percent to 19.9 percent over the past year.

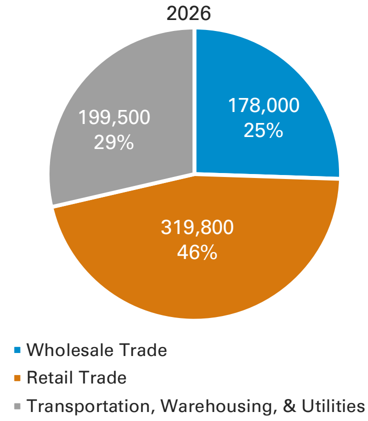
Chart 10. Trade, Transportation, and Utilities (NSA) Over-the-year Net Change, Jul-11 to Jul-26



About This Sector

This sector is composed of establishments wholesaling agriculture, mining, and manufactured goods; retailing goods in small quantities to the public incl. online; transporting passengers and cargo; warehousing and storage; and providing electricity, natural gas, water, and sewage removal. Of the three main component industries, Retail Trade accounts for a plurality of the sector's employment at 46 percent (see Chart 11).

Chart 11. Employment in Component Industries of Trade, Transportation, and Utilities Sector - July 2026



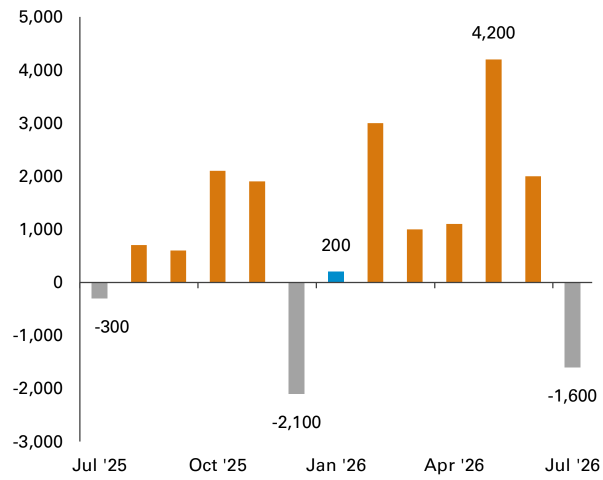
DECLINING INDUSTRY HIGHLIGHTS

Construction

Over-the-month Change

Construction was the third-largest declining sector over the month down -1,600 jobs, or -0.6 percent (see Chart 12). Historically in the month of July, Construction has lost an average of -1,100 jobs over the month, which indicates that this month's losses are moderately larger than the long-term average decline. Heavy and Civil Engineering Construction was the largest contributor to the overall sector's decline, down -900 jobs over the month. The second-largest declining contributor was Specialty Trade Contractors, which lost -400 jobs from June to July. Lastly, Construction of Buildings subtracted, -300 jobs. Construction employment was revised downward by -600 jobs for a May to June smaller net gain of 2,000 compared to an original estimate of 2,600 jobs.

Chart 12. Construction (NSA)
Over-the-month Net Change, Jul-25 to Jul-26

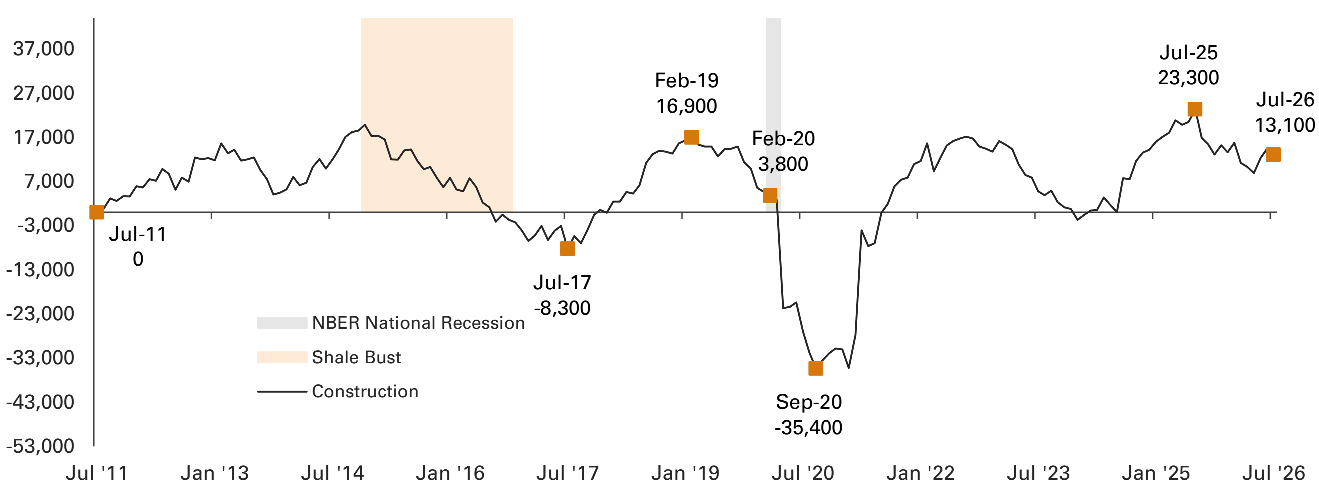


*blue bar may reflect January typical seasonal decline/gain occuring each year

Over-the-year Change

Year over year, Construction was up 13,100 jobs, or 5.2 percent (see Chart 13). Among sectors currently showing growth, this sector is the fastest-growing in percentage terms across the Houston area. Furthermore, 22.7 percent of total (gross) jobs added across the region over the past year can be attributed to Construction. Specialty Trade Contractors was the largest contributor to the overall sector's increase, up 5,700 jobs over the year. The second-largest contributor was Heavy and Civil Engineering Construction, which added 3,800 jobs from July a year ago. Lastly, Construction of Buildings contributed, 3,600 jobs. Total Construction employmnent now exceeds its February 2020 pre-pandemic level of 237,400 jobs by 29,900, or 12.6 percent. At the same time, the sector's share of Houston area Total Nonfarm Employment has risen from 7.4 percent to 7.6 percent over the past year.

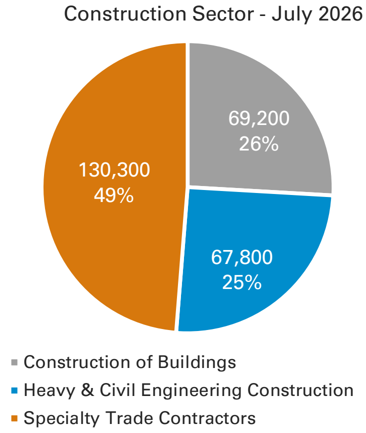
Chart 13. Construction (NSA)
Over-the-year Net Change, Jul-11 to Jul-26



About This Sector

This sector comprises establishments engaged in the construction of buildings, infrastructure, site preparation and sub-division, and specialty trades e.g. masonry, painting, and electrical work. Of the three main component industries, Specialty Trade Contractors accounts for a plurality of the sector's employment at 49 percent (see Chart 14). Across the Houston MSA, the concentration of jobs in the overall Construction sector is 42 percent higher than the national average, due to 2.5 times more jobs in Heavy and Civil Engineering Construction related to turnaround maintenance of petrochemical facilities.

Chart 14. Employment in Component Industries of Construction Sector - July 2026



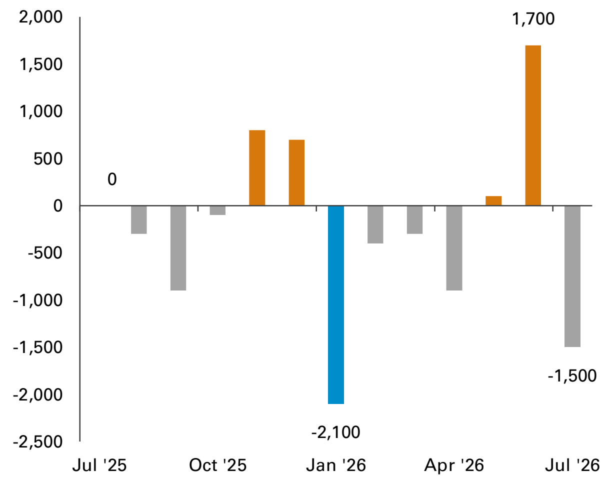
DECLINING INDUSTRY HIGHLIGHTS

Financial Activities

Over-the-month Change

Financial Activities was the fourth-largest declining sector over the month down -1,500 jobs, or -0.8 percent (see Chart 15). This July tied with 2023 and 1990 for the largest-ever decline in the month of July since records began, which also happens to be 1990. Historically in the month of July, Financial Activities has added an average of 400 jobs over the month, which indicates that this month's losses are substantially in contrast to the long-term average gain. Real Estate and Rental and Leasing was the largest contributor to the overall sector's decline, down -900 jobs over the month. The second-largest declining contributor was Finance and Insurance, which lost -600 jobs from June to July. Financial Activities employment was revised upward by 800 jobs for a May to June larger net gain of 1,700 compared to an original estimate of 900 jobs.

Chart 15. Financial Activities (NSA)
Over-the-month Net Change, Jul-25 to Jul-26

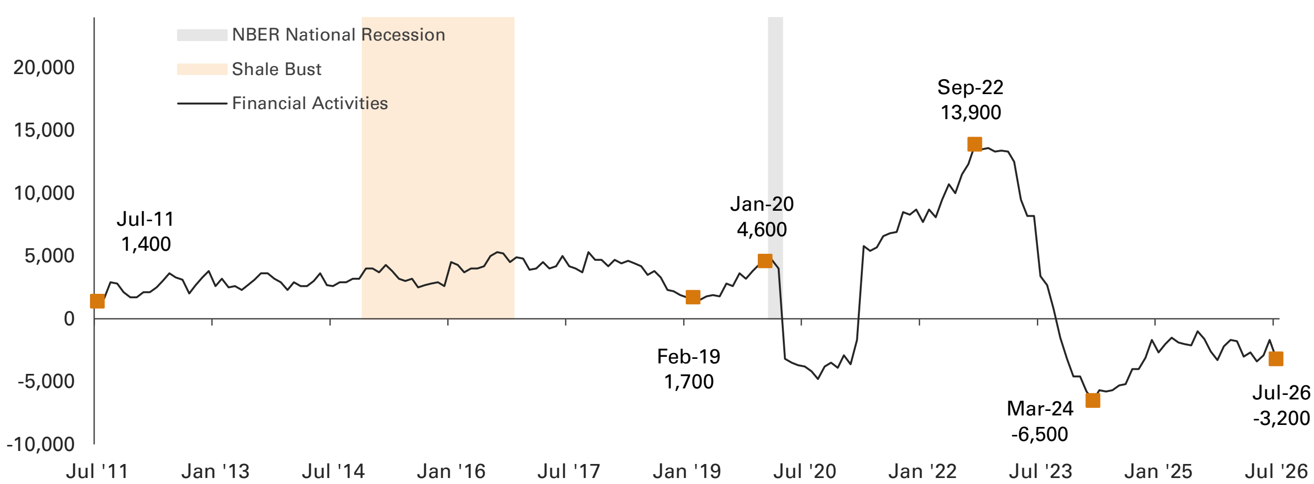


*blue bar may reflect January typical seasonal decline/gain occuring each year

Over-the-year Change

Year over year, Financial Activities was down -3,200 jobs, or -1.8 percent (see Chart 16). This was the largest over-the-year decline since April 2026's decrease of -3,400 jobs. Among sectors currently showing contraction, this sector is the second-fastest declining in percentage terms across the Houston area. Furthermore, 43.8 percent of total (gross) jobs lost across the region over the past year can be attributed to Financial Activities. Finance and Insurance was the largest contributor to the overall sector's decline, down -2,400 jobs over the year. The second-largest declining contributor was Real Estate and Rental and Leasing, which lost -800 jobs from July a year ago. Total Financial Activities employmnent (NSA) now exceeds its February 2020 pre-pandemic level of 169,200 jobs by 6,700, or 4.0 percent. At the same time, the sector's share of Houston area Total Nonfarm Employment has fallen from 5.2 percent to 5.0 percent over the past year.

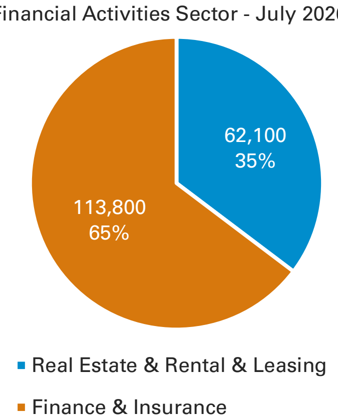
Chart 16. Financial Activities (NSA)
Over-the-year Net Change, Jul-11 to Jul-26



About This Sector

This sector is composed of establishments renting, leasing, or allowing use of assets, and financial transactions such as creation, liquidation, or change in ownership of financial assets, underwriting of insurance, and annuities. Of the two main component industries, Finance and Insurance accounts for the majority of the sector's employment at 65 percent (see Chart 17). Across the Houston MSA, the concentration of jobs in the overall Financial Activities sector is 13 percent less than the national average, due to a 23-percent lower concentration in Finance and Insurance offsetting a 14-percent higher concentration in Real Estate and Rental and Leasing.

Chart 17. Employment in Component Industries of Financial Activities Sector - July 2026



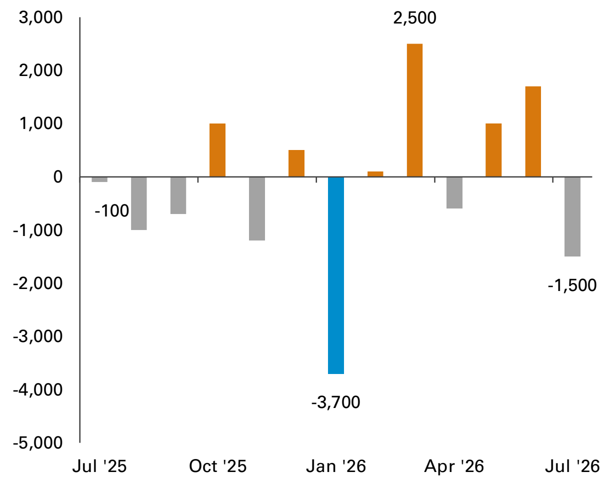
DECLINING INDUSTRY HIGHLIGHTS

Manufacturing

Over-the-month Change

Manufacturing was the fifth-largest declining sector over the month down -1,500 jobs, or -0.6 percent (see Chart 18). Historically in the month of July, Manufacturing has lost an average of -300 jobs over the month, which indicates that this month's losses are substantially larger than the long-term average decline. Durable Goods was the largest contributor to the overall sector's decline, down -900 jobs over the month. The second-largest declining contributor was Non-Durable Goods, which lost -600 jobs from June to July. Manufacturing employment was revised upward by 100 jobs for a May to June larger net gain of 1,700 compared to an original estimate of 1,600 jobs.

Chart 18. Manufacturing (NSA)
Over-the-month Net Change, Jul-25 to Jul-26

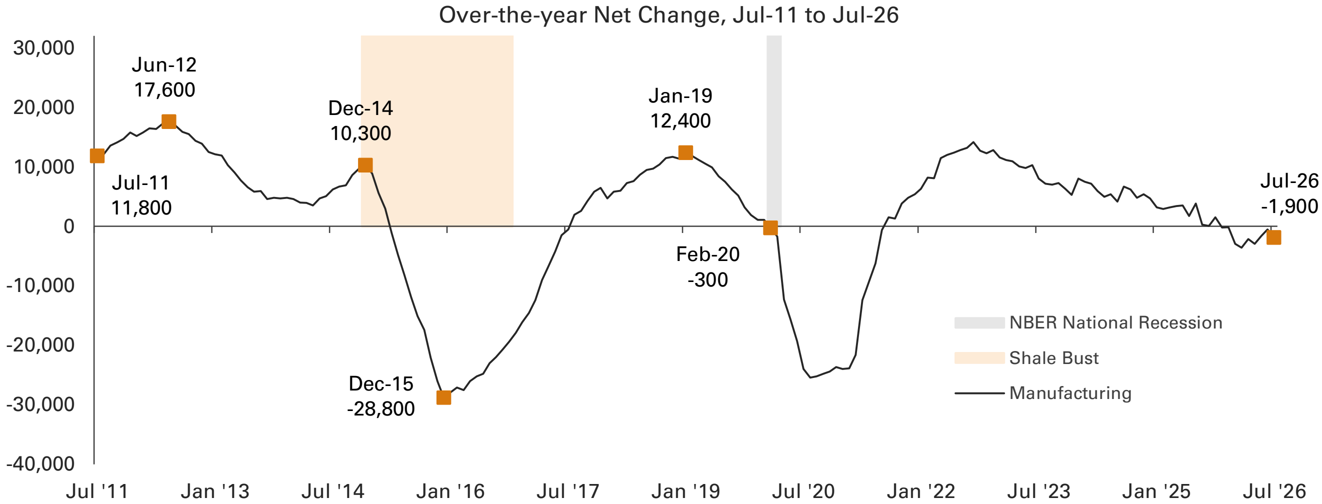


*blue bar may reflect January typical seasonal decline/gain occuring each year

Over-the-year Change

Year over year, Manufacturing was down -1,900 jobs, or -0.8 percent (see Chart 19). This was the largest over-the-year decline since April 2026's decrease of -2,900 jobs. Furthermore, 26.0 percent of total (gross) jobs lost across the region over the past year can be attributed to Manufacturing. Non-Durable Goods was the largest contributor to the overall sector's decline, down -3,500 jobs over the year. One component industry that provided a partial offset was Durable Goods, which gained 1,600 jobs from July a year ago. Total Manufacturing employmnent (NSA) now exceeds its February 2020 pre-pandemic level of 234,700 jobs by 5,400, or 2.3 percent. At the same time, the sector's share of Houston area Total Nonfarm Employment has fallen from 7.0 percent to 6.9 percent over the past year.

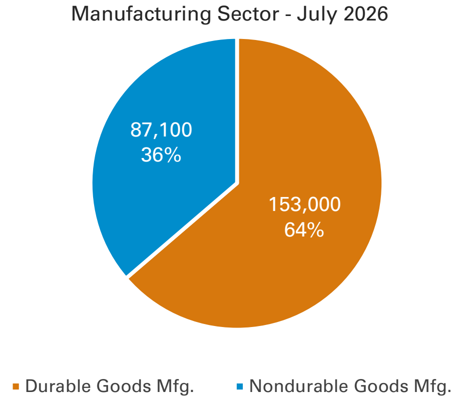
Chart 19. Manufacturing (NSA)
Over-the-year Net Change, Jul-11 to Jul-26



About This Sector

This sector comprises establishments engaged in the mechanical, physical, or chemical transformation of materials, substances, or components into new products. Of the two main component industries, Durable Goods accounts for the majority of the sector's employment at 64 percent (see Chart 20). Across the Houston MSA, the concentration of jobs in the overall Manufacturing sector is 14 percent less than the national average.

Chart 20. Employment in Component Industries of Manufacturing Sector - July 2026



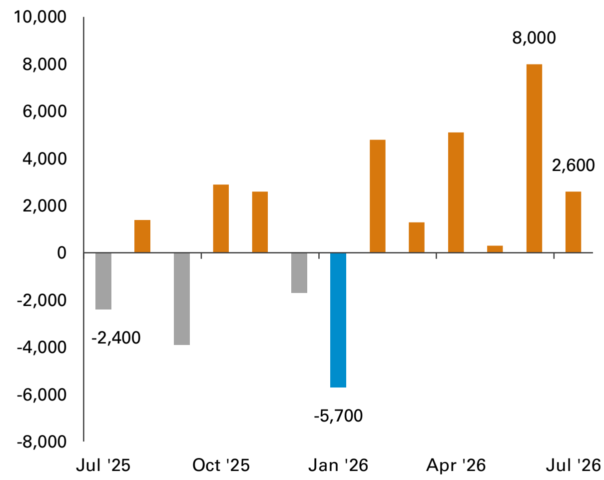
GAINING INDUSTRY HIGHLIGHTS

Professional and Business Services

Over-the-month Change

Professional and Business Services was the largest gaining sector over the month up 2,600 jobs, or 0.4 (see Chart 21). Historically in the month of July, Professional and Business Services has added an average of 800 jobs over the month, which indicates that this month's gains are substantially above the long-term average. Professional, Scientific, and Technical Services was the largest contributor to the overall sector's increase, up 2,400 jobs over the month. The second-largest contributor was Administrative and Support and Waste Management and Remediation Services, which added 200 jobs from June to July. Lastly, Management of Companies and Enterprises saw no change over the month. Professional and Business Services employment was revised upward by 200 jobs for a May to June larger net gain of 8,000 compared to an original estimate of 7,800 jobs.

Chart 21. Professional and Business Services (NSA)
Over-the-month Net Change, Jul-25 to Jul-26

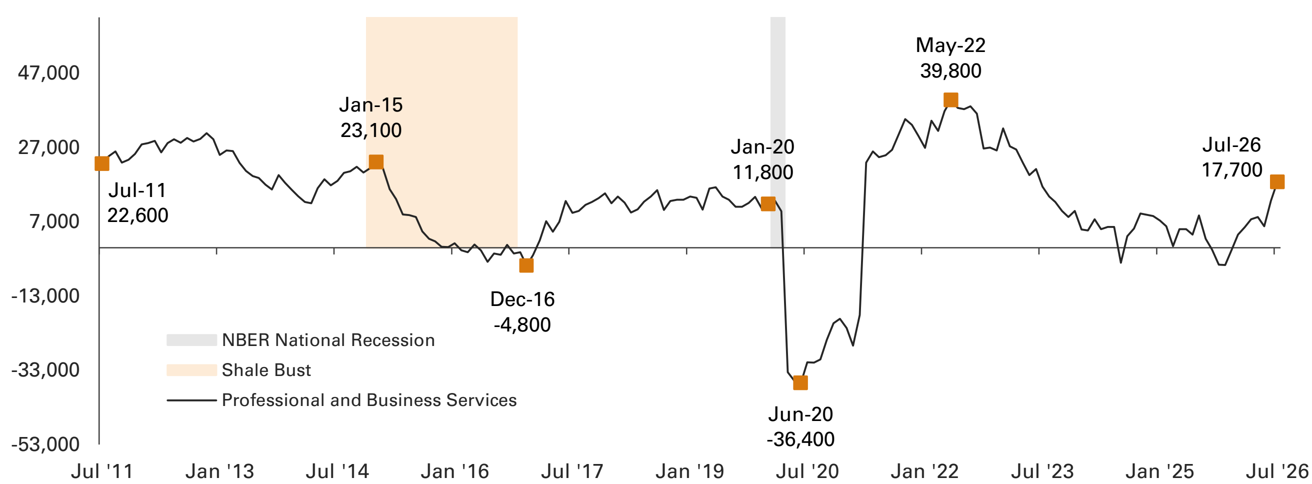


*blue bar may reflect January typical seasonal decline/gain occuring each year

Over-the-year Change

Year over year, Professional and Business Services was up 17,700 jobs, or 3.1 percent (see Chart 22). This was the largest over-the-year gain since June 2023's increase of 21,200 jobs. Among sectors currently showing growth, this sector is the third-fastest growing in percentage terms across the Houston area. Furthermore, 30.7 percent of total (gross) jobs added across the region over the past year can be attributed to Professional and Business Services. Administrative and Support and Waste Management and Remediation Services was the largest contributor to the overall sector's increase, up 13,100 jobs over the year. The second-largest contributor was Professional, Scientific, and Technical Services, which added 5,000 jobs from July a year ago. Lastly, Management of Companies and Enterprises offset a portion of the sector's gains with a loss of -400 jobs. Total Professional and Business Services employmnent (NSA) now exceeds its February 2020 pre-pandemic level of 514,600 jobs by 68,300, or 13.3 percent. At the same time, the sector's share of Houston area Total Nonfarm Employment has risen from 16.4 percent to 16.7 percent over the past year.

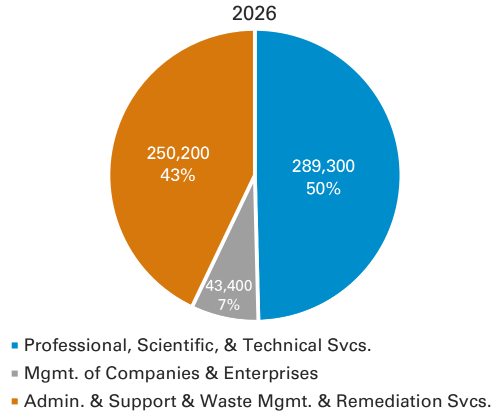
Chart 22. Professional and Business Services (NSA)
Over-the-year Net Change, Jul-11 to Jul-26



About This Sector

This sector is composed of establishments specializing in professional, scientific, and technical activities; managment of establishments holding equity interests in order to influence management decisions; and office administration, hiring of personnel, security, cleaning, and waste disposal. Of the three main component industries, Professional, Scientific, and Technical Services accounts for a plurality of the sector's employment at 50 percent (see Chart 23). Across the Houston MSA, the concentration of jobs in the overall sector is 17 percent higher than the national average, due to a 21-percent higher concentration in Professional, Scientific, and Technical Services serving the oil and gas industry.

Chart 23. Employment in Component Industries of Professional and Business Services Sector - July 2026



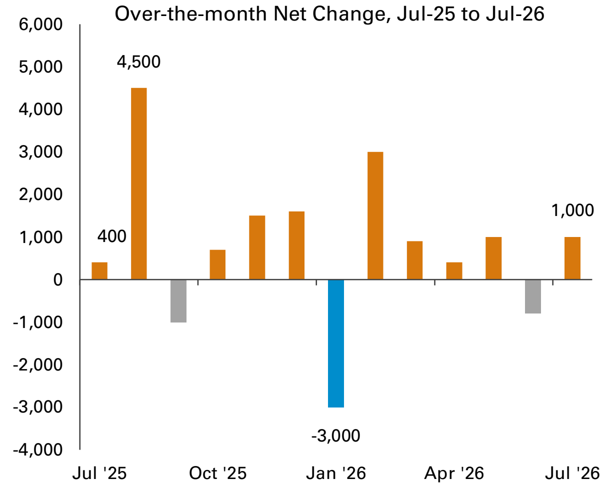
GAINING INDUSTRY HIGHLIGHTS

Private Education and Health Services

Over-the-month Change

Private Education and Health Services was the second-largest gaining sector over the month up 1,000 jobs, or 0.2 (see Chart 24). Historically in the month of July, Private Education and Health Services has seen no change in jobs over the month, which indicates that this month's gains are substantially above the long-term average. Health Care and Social Assistance was the largest contributor to the overall sector's increase, up 2,300 jobs over the month. One component industry that provided a partial offset was Private Educational Services, which lost -1,300 jobs from June to July. Private Education and Health Services employment was revised upward by 3,200 jobs for a May to June smaller net loss of -800 compared to an original estimate of -4,000 jobs.

Chart 24. Private Education and Health Services (NSA)
Over-the-month Net Change, Jul-25 to Jul-26

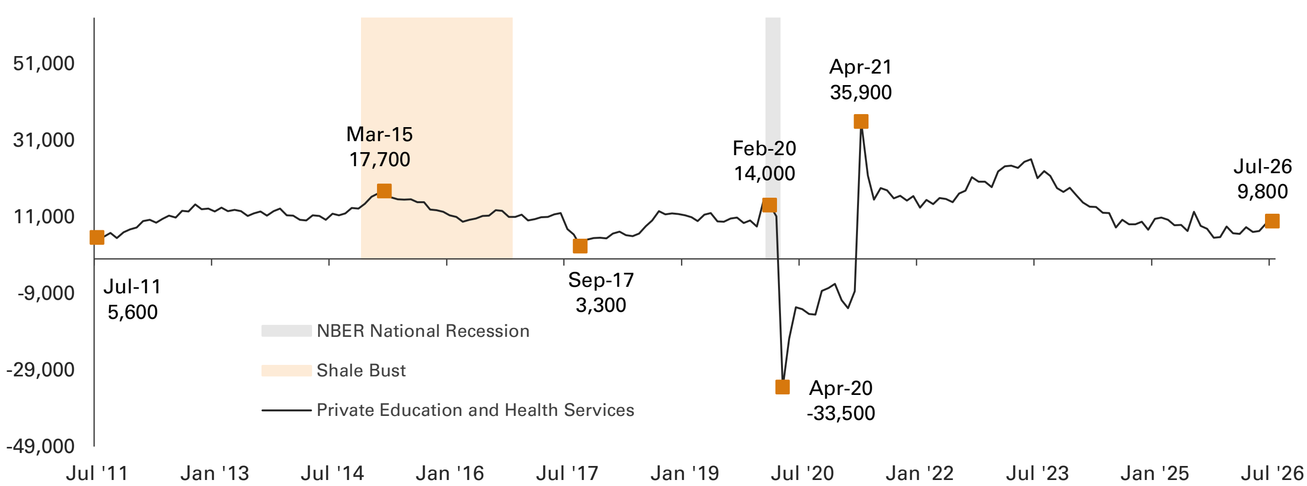


*blue bar may reflect January typical seasonal decline/gain occuring each year

Over-the-year Change

Year over year, Private Education and Health Services was up 9,800 jobs, or 2.1 percent (see Chart 25). This was the largest over-the-year gain since July 2025's increase of 12,300 jobs. Furthermore, 17.0 percent of total (gross) jobs added across the region over the past year can be attributed to Private Education and Health Services. Health Care and Social Assistance was the largest contributor to the overall sector's increase, up 9,400 jobs over the year. The second-largest contributor was Private Educational Services, which added 400 jobs from July a year ago. Total Private Education and Health Services employmnent (NSA) now exceeds its February 2020 pre-pandemic level of 414,600 jobs by 61,200, or 14.8 percent. At the same time, the sector's share of Houston area Total Nonfarm Employment has remained constant at 13.5 percent over the past year.

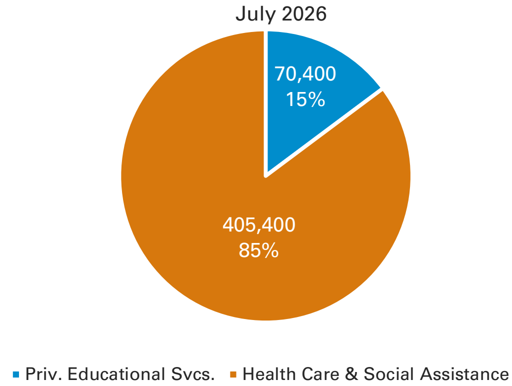
Chart 25. Private Education and Health Services (NSA)
Over-the-year Net Change, Jul-11 to Jul-26



About This Sector

This sector is composed of establishments that provide private education services (i.e. excluding publicly-funded primary, secondary, and postsecondary institutions) and establishments that provide healthcare and social assistance to individuals. Of the two main component industries, Health Care and Social Assistance accounts for the majority of the sector's employment at 85 percent (see Chart 26). Across the Houston MSA, the concentration of jobs in the overall sector is 22 percent less than the national average, despite the high physical concentration of healthcare jobs centered around Texas Medical Center.

Chart 26. Employment in Component Industries of Private Education and Health Services Sector - July 2026



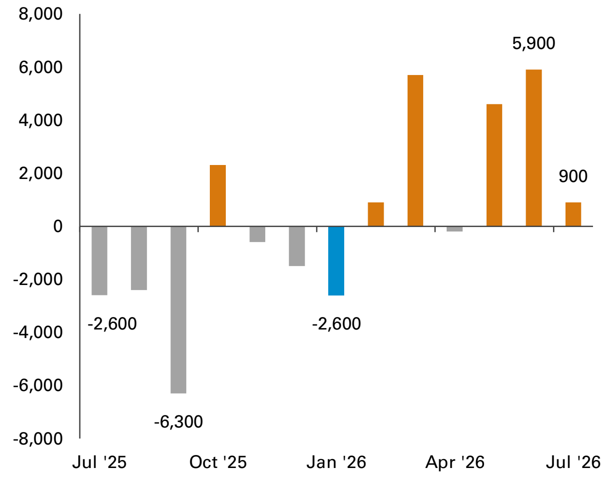
GAINING INDUSTRY HIGHLIGHTS

Leisure and Hospitality

Over-the-month Change

Leisure and Hospitality was the third-largest gaining sector over the month up 900 jobs, or 0.2 (see Chart 27). Historically in the month of July, Leisure and Hospitality has lost an average of -1,600 jobs over the month, which indicates that this month's gains are substantially in contrast to the long-term average decline. Accommodation and Food Services was the largest contributor to the overall sector's increase, up 500 jobs over the month. The second-largest contributor was Arts, Entertainment, and Recreation, which added 400 jobs from June to July. Leisure and Hospitality employment was revised downward by -700 jobs for a May to June smaller net gain of 5,900 compared to an original estimate of 6,600 jobs.

Chart 27. Leisure and Hospitality (NSA)
Over-the-month Net Change, Jul-25 to Jul-26

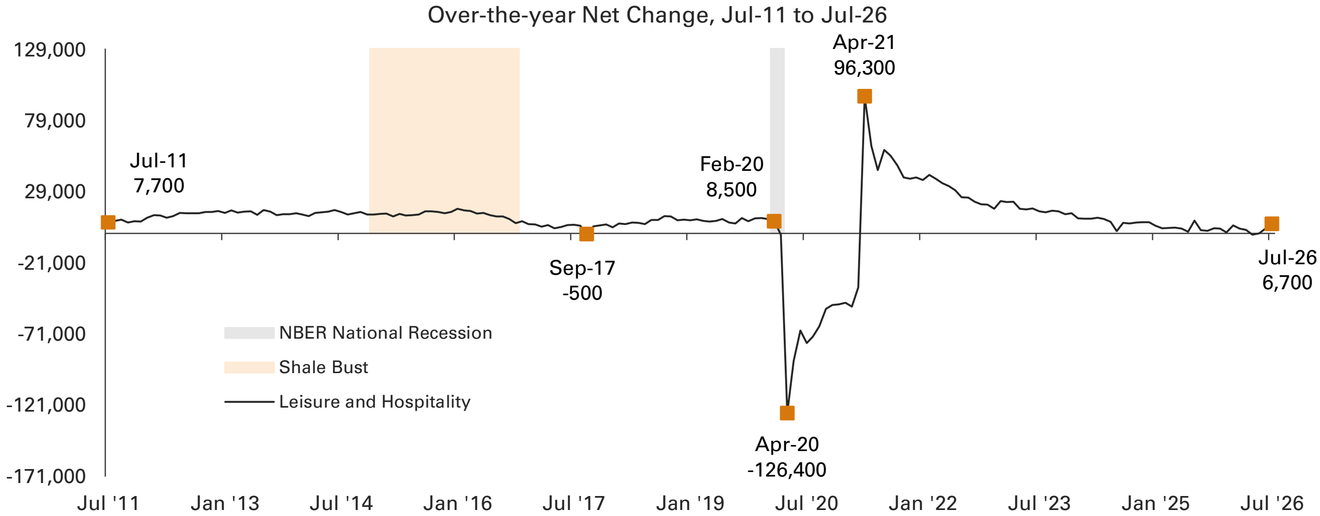


*blue bar may reflect January typical seasonal decline/gain occuring each year

Over-the-year Change

Year over year, Leisure and Hospitality was up 6,700 jobs, or 1.8 percent (see Chart 28). This was the largest over-the-year gain since July 2025's increase of 9,000 jobs. Accommodation and Food Services was the largest contributor to the overall sector's increase, up 8,400 jobs over the year. One component industry that provided a partial offset was Arts, Entertainment, and Recreation, which lost -1,700 jobs from July a year ago. Total Leisure and Hospitality employmnent (NSA) now exceeds its February 2020 pre-pandemic level of 334,600 jobs by 46,500, or 13.9 percent. At the same time, the sector's share of Houston area Total Nonfarm Employment has remained constant at 10.9 percent over the past year.

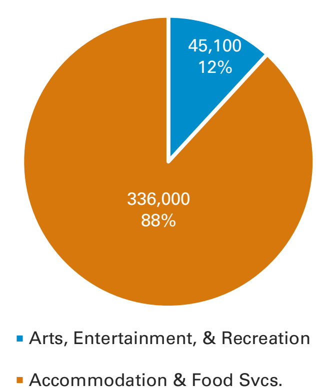
Chart 28. Leisure and Hospitality (NSA)
Over-the-year Net Change, Jul-11 to Jul-26



About This Sector

This sector is composed of establishments that produce and promote in live performances, events, of exhibits of historical, cultural, or educational interest or related to recreation or hobbies intended for public viewing; and provide customers with lodging and/or meals and beverages for immediate consumption. NOTE: movie theaters are classified under the Information sector rather than Leisure and Hospitality. Of the two main component industries, Accommodation and Food Services accounts for the majority of the sector's employment at 88 percent (see Chart 29). Across the Houston MSA, the concentration of jobs in the overall sector is 2 percent less than the national average.

Chart 29. Employment in Component Industries of
Leisure and Hospitality Sector - July 2026



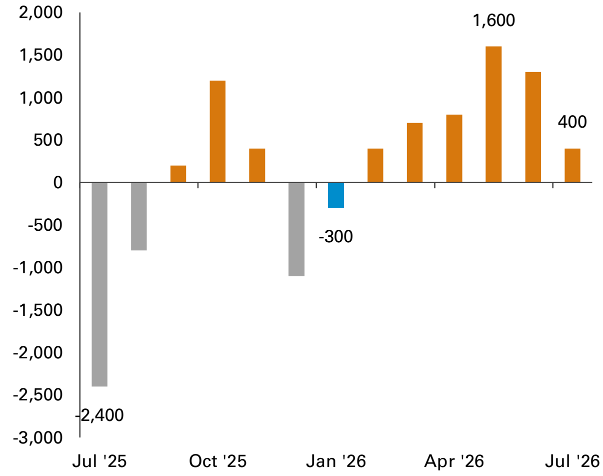
GAINING INDUSTRY HIGHLIGHTS

Other Services

Over-the-month Change

Other Services also saw an increase over the month up 400 jobs, or 0.3 (see Chart 30). Historically in the month of July, Other Services has lost an average of -200 jobs over the month, which indicates that this month's gains are substantially in contrast to the long-term average decline. NOTE: No subsector is published at the MSA level by the CES survey. See below for additional information. Other Services employment was revised downward by -900 jobs for a May to June smaller net gain of 1,300 compared to an original estimate of 2,200 jobs.

Chart 30. Other Services (NSA)
Over-the-month Net Change, Jul-25 to Jul-26

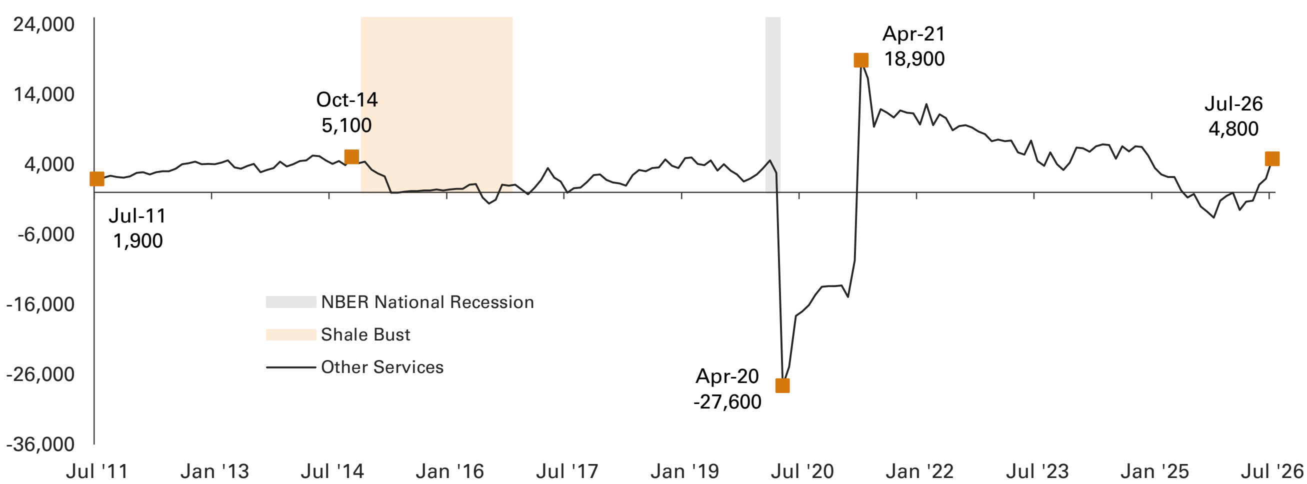


*blue bar may reflect January typical seasonal decline/gain occuring each year

Over-the-year Change

Year over year, Other Services was up 4,800 jobs, or 3.7 percent (see Chart 31). This was the largest over-the-year gain since December 2024's increase of 5,300 jobs. Among sectors currently showing growth, this sector is the second-fastest growing in percentage terms across the Houston area. NOTE: No subsector is published at the MSA level by the CES survey. See below for additional information. Total Other Services employmnent (NSA) now exceeds its February 2020 pre-pandemic level of 119,200 jobs by 16,200, or 13.6 percent. At the same time, the sector's share of Houston area Total Nonfarm Employment has remained constant at 3.8 percent over the past year.

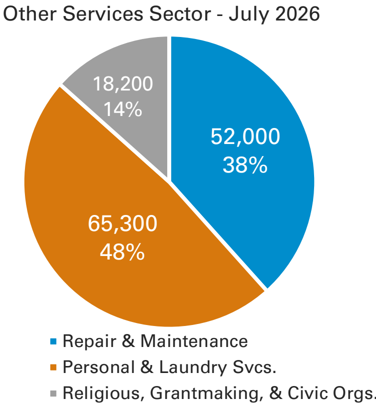
Chart 31. Other Services (NSA)
Over-the-year Net Change, Jul-11 to Jul-26



About This Sector

This sector comprises establishments engaged in services not classified elsewhere such as equipment and machinery repair, religious activities, grantmaking, advocacy, and providing dry-cleaning and laundry services, and personal care services. Of the three main component industries, Personal and Laundry Services accounts for a plurality of the sector's employment at 48 percent as a subsector where self-employment is prevalent (source: Census - Non Employer Statistics and BLS - Quarterly Census of Employment and Wages) (see Chart 32). Across the Houston MSA, the concentration of jobs in the overall Other Services sector is 0 percent higher than the national average.

Chart 32. Employment in Component Industries of Other Services Sector - July 2026



*estimated proportions based QCEW covered and NES self-employment

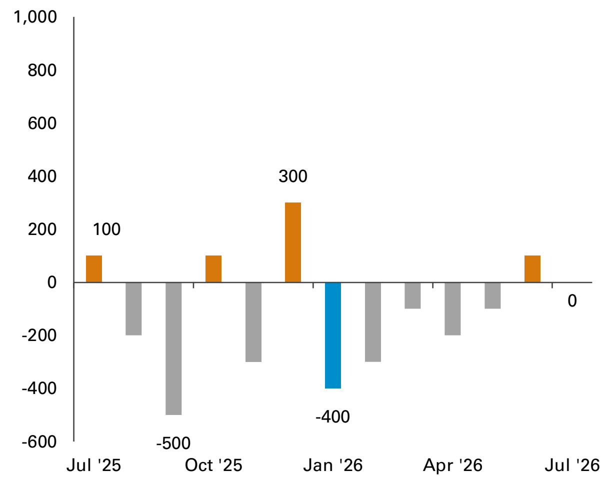
GAINING INDUSTRY HIGHLIGHTS

Information

Over-the-month Change

Information was unchanged over the month. (see Chart 33). Historically in the month of July, Information has lost an average of -100 jobs over the month, which indicates that this month's net zero change is on par with the long-term average. Telecommunications like the overall sector also saw no change over the month. Information employment saw no revision from May to June leaving the previous month's original increase of 100 intact.

Chart 33. Information (NSA)
Over-the-month Net Change, Jul-25 to Jul-26

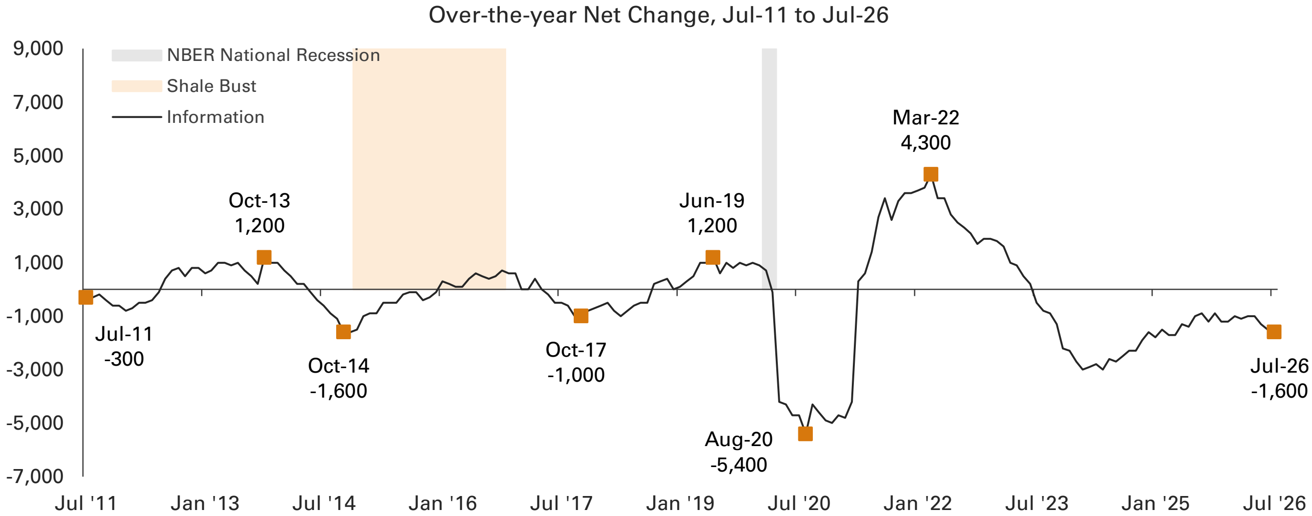


*blue bar may reflect January typical seasonal decline/gain occuring each year

Over-the-year Change

Year over year, Information was down -1,600 jobs, or -5.5 percent (see Chart 34). This was the largest over-the-year decline since April 2025's decrease of -1,700 jobs. Among sectors currently showing contraction, this sector is the fastest declining in percentage terms across the Houston area. Furthermore, 21.9 percent of total (gross) jobs lost across the region over the past year can be attributed to Information. Other Information Undefined was the largest contributor to the overall sector's decline, down -1,200 jobs over the year. The second-largest declining contributor was Telecommunications, which lost -400 jobs from July a year ago. Total Information employmnent (NSA) remains -5,300 jobs, or -16.2 percent below its February 2020 pre-pandemic level of 32,700. At the same time, the sector's share of Houston area Total Nonfarm Employment has remained constant at 0.8 percent over the past year.

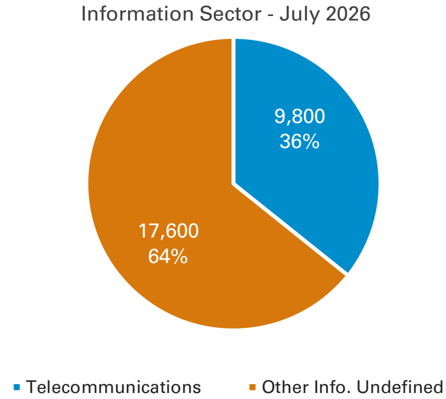
Chart 34. Information (NSA)
Over-the-year Net Change, Jul-11 to Jul-26



About This Sector

This sector comprises establishments producing and distributing information and cultural products, e.g. traditional and online news publishing; software publishing; the motion picture and sound recording; TV broadcasting; and telecommunications. Of the two main component industries, Other Information Undefined accounts for the majority of the sector's employment at 64 percent (see Chart 35). Across the Houston MSA, the concentration of jobs in the overall Information sector is 55 percent less than the national average.

Chart 35. Employment in Component Industries of Information Sector - July 2026



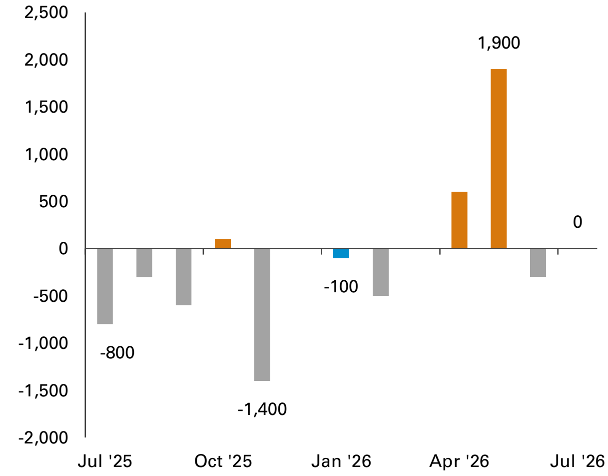
GAINING INDUSTRY HIGHLIGHTS

Mining and Logging

Over-the-month Change

Mining and Logging was unchanged over the month. (see Chart 36). Historically in the month of July, Mining and Logging has added an average of 300 jobs over the month, which indicates that this month's net zero change is slightly below the long-term average. All three components of Mining and Logging: Oil & Gas Extraction, Support Activities for Mining, and Other Mining and Logging Undefined saw no change over the month. Mining and Logging employment was revised downward by -100 jobs for a May to June larger net loss of -300 compared to an original estimate of -200 jobs.

Chart 36. Mining and Logging (NSA)
Over-the-month Net Change, Jul-25 to Jul-26

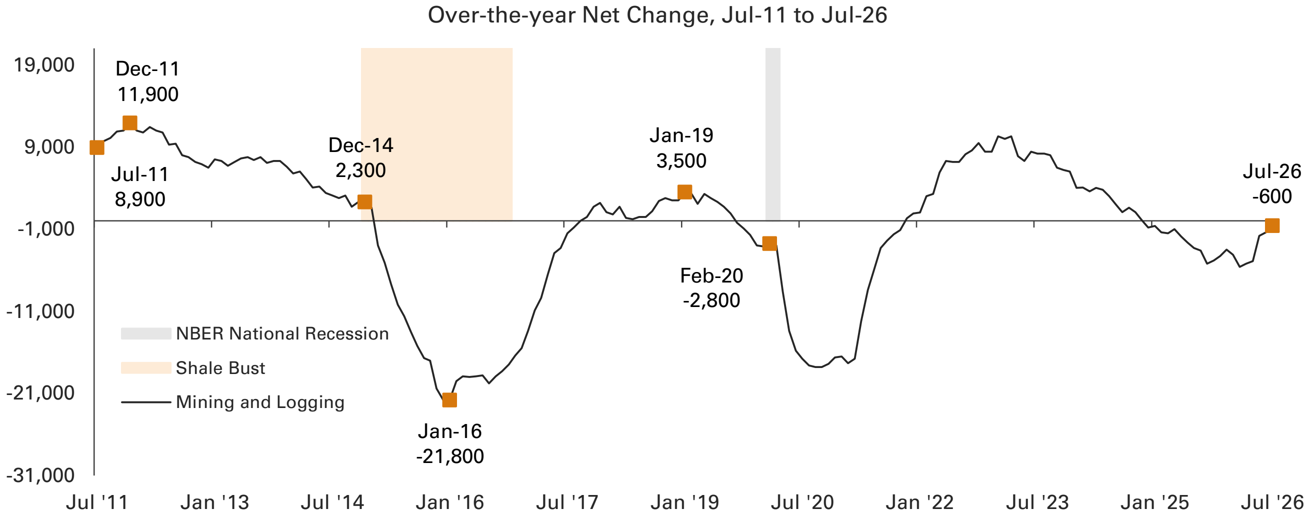


*blue bar may reflect January typical seasonal decline/gain occuring each year

Over-the-year Change

Year over year, Mining and Logging was down -600 jobs, or -0.8 percent (see Chart 37). Among sectors currently showing contraction, this sector is the third-fastest declining in percentage terms across the Houston area. Oil and Gas Extraction was the largest contributor to the overall sector's decline, down -600 jobs over the year. The second-largest declining contributor was Support Activities for Mining, which lost -100 jobs from July a year ago. Lastly, Other Mining and Logging Undefined offset a portion of the sector's losses with a gain of 100 jobs. Total Mining and Logging employmnent (NSA) remains -5,000 jobs, or -6.4 percent below its February 2020 pre-pandemic level of 78,400. At the same time, the sector's share of Houston area Total Nonfarm Employment has remained constant at 2.1 percent over the past year.

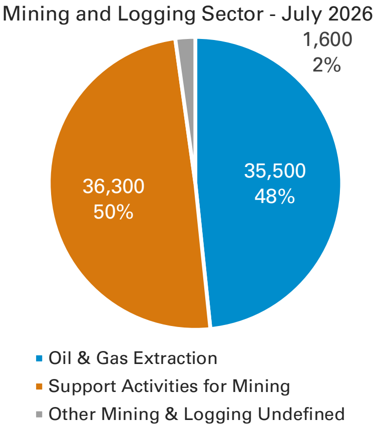
Chart 37. Mining and Logging (NSA)
Over-the-year Net Change, Jul-11 to Jul-26



About This Sector

This sector comprises establishments extracting naturally occurring minerals such as coal and ores; liquid minerals, such as crude petroleum and natural gas; and timber. Of the three main component industries, Support Activities for Mining accounts for a plurality of the sector's employment at 49 percent (see Chart 38). Across the Houston MSA, the concentration of jobs in the overall Mining and Logging sector is 5.4 times the national average, due to the region's role as a global hub for the oil and gas industry.

Chart 38. Employment in Component Industries of
Mining and Logging Sector - July 2026



Local Area Unemployment Statistics

Not-Seasonally Adjusted

Houston Metro, Texas, and U.S. Unemployment

The Houston MSA (not-seasonally-adjusted) unemployment rate stood at 5.1 percent in July, down from June's 5.2 percent and up from 4.8 percent a year ago. This was above the statewide rate of 4.8 percent and above the national rate of 4.4 percent. Performance of the unemployment rate in July has been mixed historically with a 60/40 split of declines to increases. 201,776 individuals were unemployed in Houston in July, down from June's 204,394 and up from 185,458 in July 2025 (see Charts 39 and 40).

Chart 39. Unemployment Rates (NSA)
U.S., Texas, and Houston MSA
July 2026

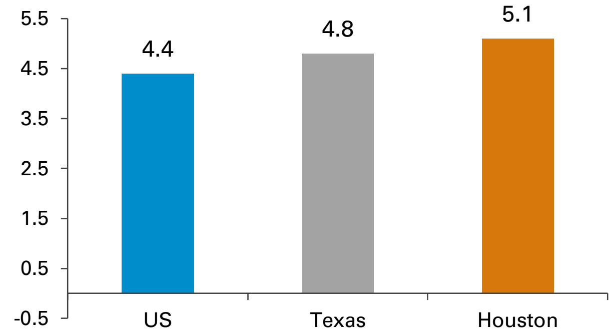
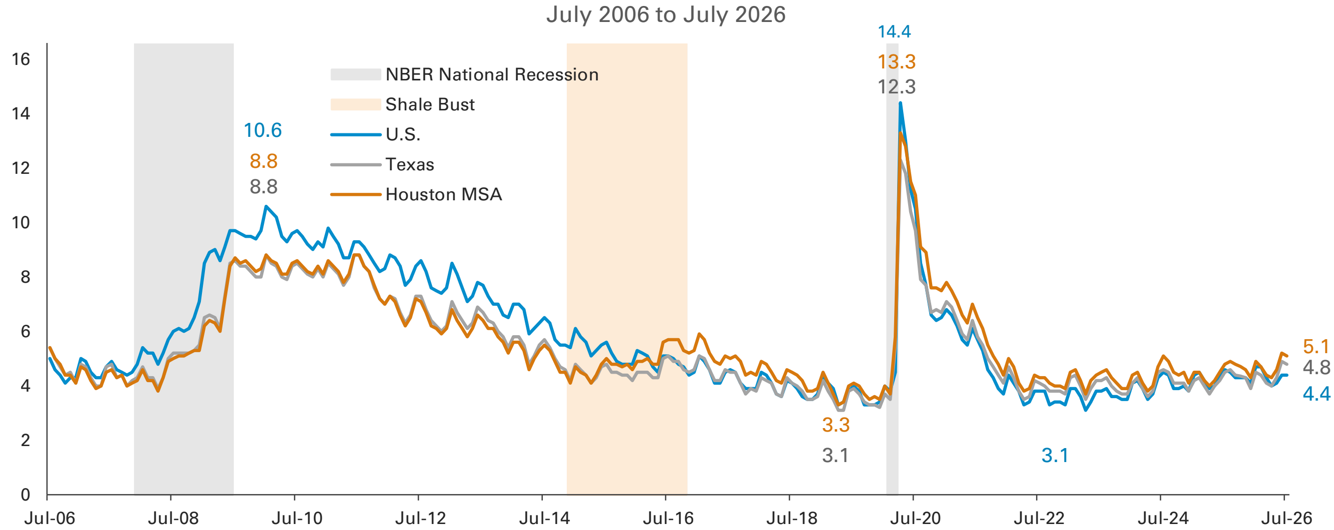


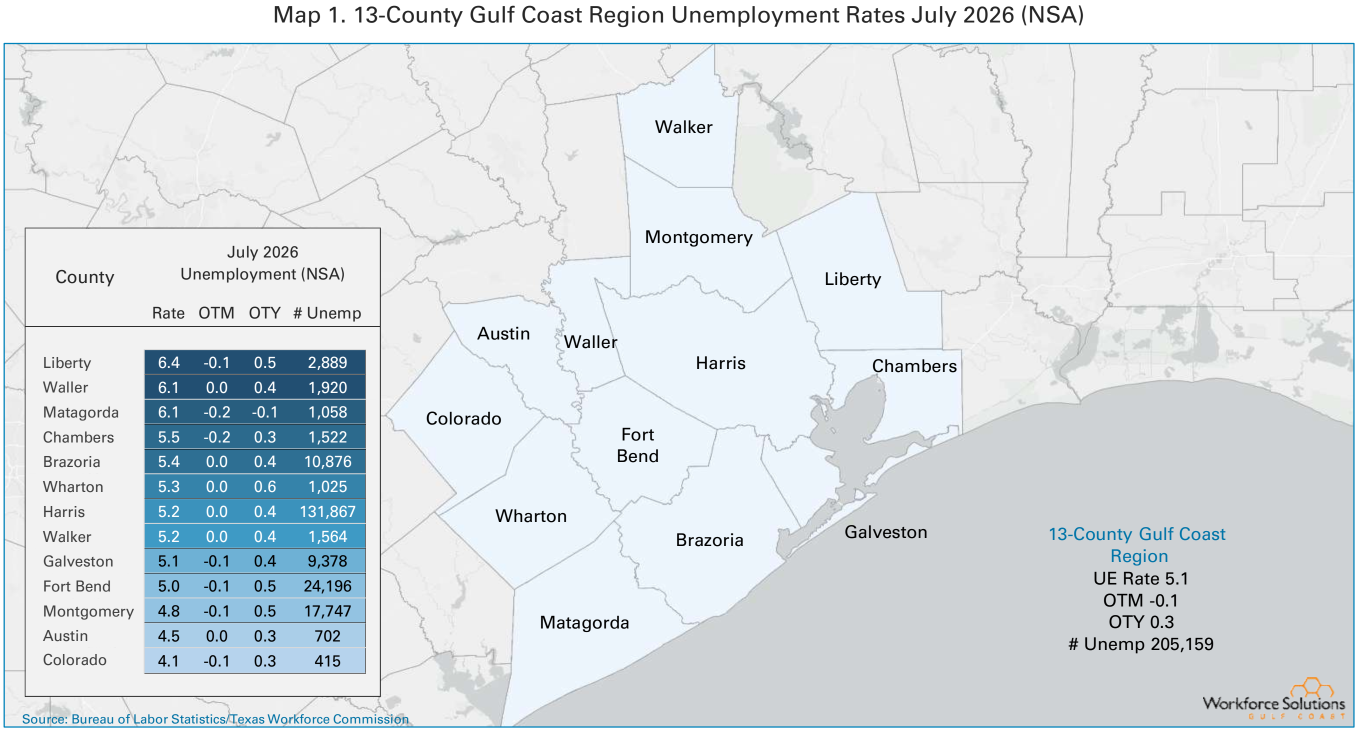
Chart 40. Unemployment Rates U.S., Texas, and Houston MSA (NSA)
July 2006 to July 2026



County-level Unemployment

Among the 13 counties that comprise the Gulf Coast Workforce Development Area, unemployment rates in July ranged from a high of 6.4 percent in Liberty County to a low of 4.1 percent in Colorado. Over the month, seven counties saw their unemployment rates decline in keeping with the region-wide decrease of -0.1 percentage points while six saw no changes. Chambers saw the largest percentage-point decrease in unemployment down -0.2 pp. representing -59 fewer unemployed workers compared to the previous month. This was followed by Matagorda (-0.2 pp, -27 workers) and Fort Bend (-0.1 pp, -354 workers). Over the year unemployment rates rose with, Wharton posting the largest increase, up 0.6 percentage points representing 105 more unemployed workers compared to a year ago followed by Fort Bend (0.5 pp, 2,369 workers) and Liberty (0.5 pp, 246 workers). Since peaking at 448,765 in April 2020 due to the COVID-19 global pandemic, the number of unemployed workers in the Gulf Coast Region has fallen by -243,606 as of this July (see Map 1 legend).

Map 1. 13-County Gulf Coast Region Unemployment Rates July 2026 (NSA)



County	July 2026 Unemployment (NSA)			
	Rate	OTM	OTY	# Unemp
Liberty	6.4	-0.1	0.5	2,889
Waller	6.1	0.0	0.4	1,920
Matagorda	6.1	-0.2	-0.1	1,058
Chambers	5.5	-0.2	0.3	1,522
Brazoria	5.4	0.0	0.4	10,876
Wharton	5.3	0.0	0.6	1,025
Harris	5.2	0.0	0.4	131,867
Walker	5.2	0.0	0.4	1,564
Galveston	5.1	-0.1	0.4	9,378
Fort Bend	5.0	-0.1	0.5	24,196
Montgomery	4.8	-0.1	0.5	17,747
Austin	4.5	0.0	0.3	702
Colorado	4.1	-0.1	0.3	415

Source: Bureau of Labor Statistics/Texas Workforce Commission

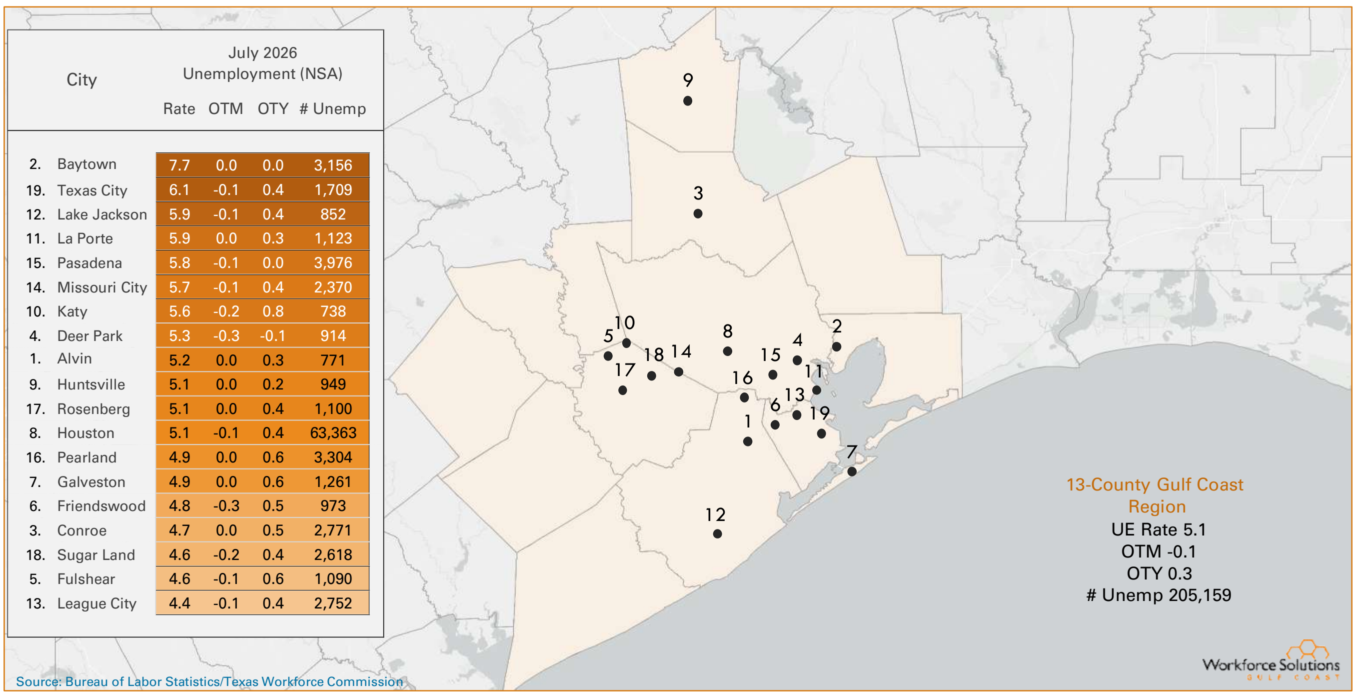
Local Area Unemployment Statistics (continued)

Not-Seasonally Adjusted

Unemployment Rates for Select Municipalities

Among the 19 cities in the Gulf Coast Workforce Development Area for which Local Area Unemployment Statistics are available, unemployment rates in July ranged from a high of 7.7 percent in Baytown to a low of 4.4 percent in League City (see Map 2 legend). Over the month, 11 cities saw their unemployment rates decline in keeping with the region-wide decrease of -0.1 percentage points while eight saw no changes. Friendswood saw the largest percentage-point decrease in unemployment down -0.3 pp. representing -56 fewer unemployed workers compared to the previous month. This was followed by Deer Park (-0.3 pp, -48 workers) and Katy (-0.2 pp, -36 workers). Over the year unemployment rates rose with, Katy posting the largest increase, up 0.8 percentage points representing 107 more unemployed workers compared to a year ago followed by Pearland (0.6 pp, 381 workers) and Fulshear (0.6 pp, 137 workers). The 19 cities below accounted for 47 percent of the 205,159 unemployed workers across the Gulf Coast Region as of this July (see Map 2 legend).

Map 2. 13-County Gulf Coast Region City Unemployment Rates July 2026 (NSA)



City	Rate	OTM	OTY	# Unemp
2. Baytown	7.7	0.0	0.0	3,156
19. Texas City	6.1	-0.1	0.4	1,709
12. Lake Jackson	5.9	-0.1	0.4	852
11. La Porte	5.9	0.0	0.3	1,123
15. Pasadena	5.8	-0.1	0.0	3,976
14. Missouri City	5.7	-0.1	0.4	2,370
10. Katy	5.6	-0.2	0.8	738
4. Deer Park	5.3	-0.3	-0.1	914
1. Alvin	5.2	0.0	0.3	771
9. Huntsville	5.1	0.0	0.2	949
17. Rosenberg	5.1	0.0	0.4	1,100
8. Houston	5.1	-0.1	0.4	63,363
16. Pearland	4.9	0.0	0.6	3,304
7. Galveston	4.9	0.0	0.6	1,261
6. Friendswood	4.8	-0.3	0.5	973
3. Conroe	4.7	0.0	0.5	2,771
18. Sugar Land	4.6	-0.2	0.4	2,618
5. Fulshear	4.6	-0.1	0.6	1,090
13. League City	4.4	-0.1	0.4	2,752

(July 2026 Unemployment (NSA))

Seasonally Adjusted

Houston Metro, Texas, and U.S. Unemployment

The Houston MSA (seasonally-adjusted) unemployment rate stood at 4.7 percent in June, up from May's 4.6 percent and up from 4.4 percent a year ago. This was above the statewide rate of 4.4 percentand above the national rate of 4.2 percent. 184,348 individuals were unemployed in Houston in June, up from May's 181,355 and up from 173,258 in June 2025 (see Charts 41 and 42). NOTE: Seasonally-adjusted data for the MSA are available with a one-month delaybut are not available for the 13-County Region or 19 cities.

Chart 41. Unemployment Rates (SA)
U.S., Texas, and Houston MSA
June 2026

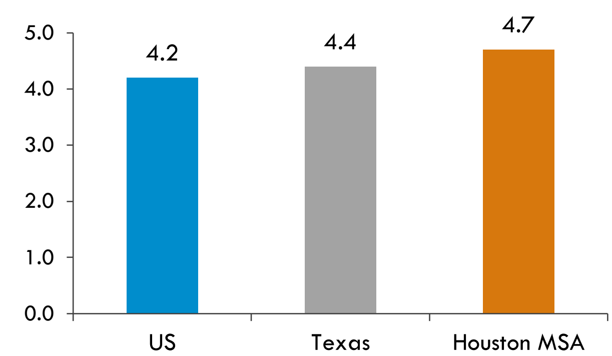
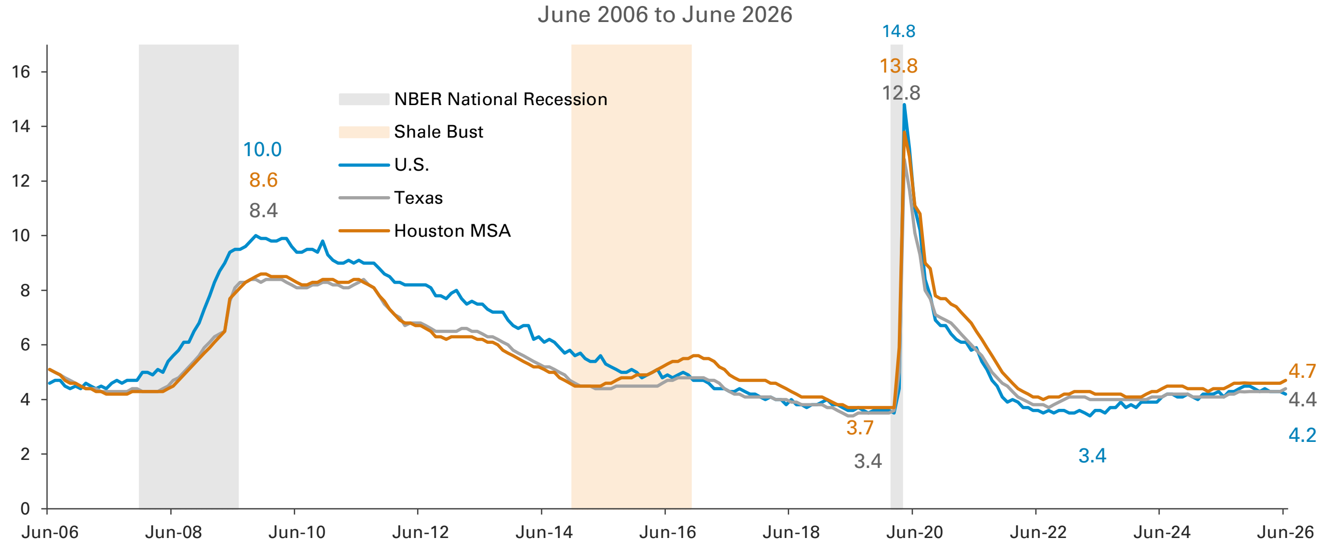


Chart 42. Unemployment Rates U.S., Texas, and Houston MSA (SA)
June 2006 to June 2026



Houston MSA Workforce Solutions Index (WSI)

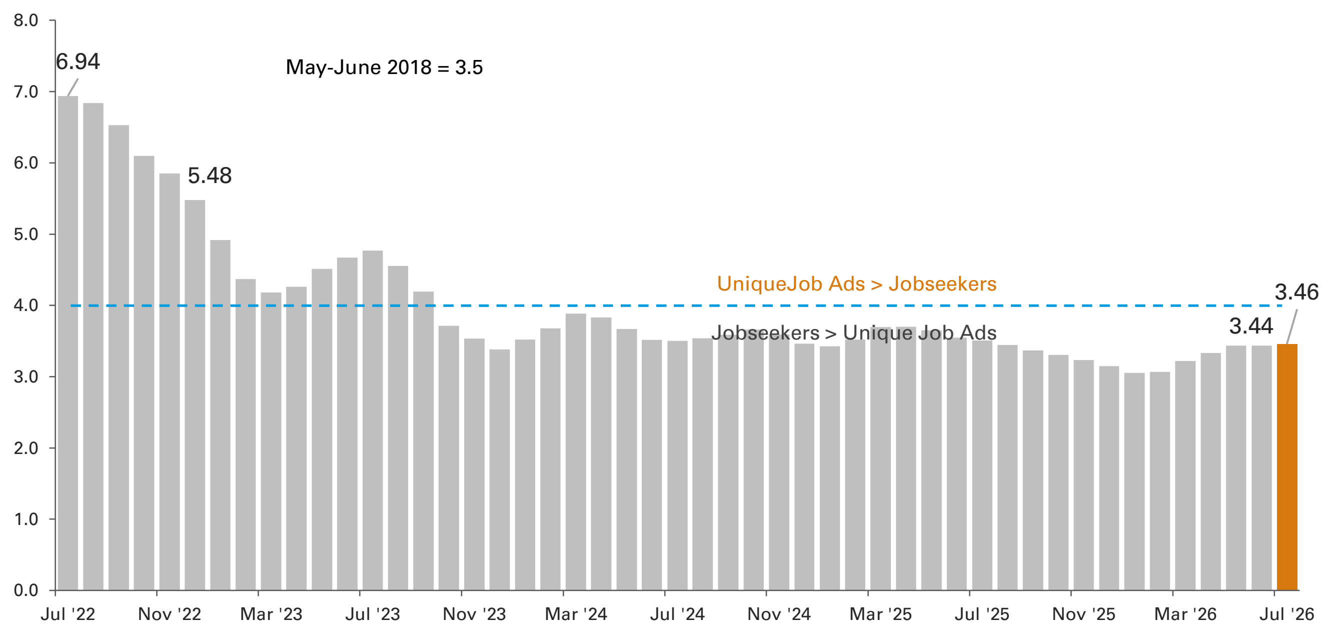
The Houston MSA Workforce Solutions Index (WSI)

The WSI is an indicator designed to capture shifts in the local labor market, specifically the balance between available jobs and unemployed workers at a given point in time. Values above 4.0 signal a surplus of jobs while values less than 4.0 signal a surplus of jobseekers. The Gulf Coast Workforce Board monitors the WSI as part of its ongoing review of the region's unemployment insurance work search requirement and reserves the right to adjust the number of weekly job search contacts as labor market conditions warrant. In the event of change to the work search requirement, the Board will notify the Texas Workforce Commission who will in turn notify UI recipients.

WSI Reading July 2026:

3.46

Houston MSA Workforce Solutions Index - 2022 - 2026 (SA)



Source(s): Emsi-Burning Glass and BLS/TWC - LAUS
Note: data subject to revisions.

Workforce Solutions Index July 2026

The Houston MSA WSI for July stood at 3.46, up from June's 3.44. This was the result of a 1,300 decrease in the number of active job ads between June and July coupled with a 5,000 increase in the number of unemployed individuals between May and June. This July marks 6 consecutive months of increases in the WSI from a recent low of 3.05 in January. In addition, January's reading was the lowest since April 2021, which was followed by a sharp increase in August of that year signaling the start of acute labor shortages associated with the post-pandemic rebound period.

As of July the index has remained below the equilibrium value of 4.0. for 34 consecutive months while remaining above 3.0 reaffirming the relative advantage of employers compared to jobseekers. As a result, the WSI continues to suggest that a requirement of three work search activities each week may be appropriate for individuals receiving unemployment insurance given the relative availability of jobs at present.

Table 1. Houston MSA Sectors and Major Industry Subcomponents

NAICS Industry	Jul-26	Jun-26	Jul-25	Monthly	Monthly	Yearly	Yearly %
Total Nonfarm	**3,497,700**	**3,522,700**	**3,447,400**	**-25,000**	**-0.7%**	**50,300**	**1.5%**
Total Private	3,056,600	3,058,000	3,009,800	-1,400	0.0%	46,800	1.6%
Goods Producing	580,800	583,900	570,200	-3,100	-0.5%	10,600	1.9%
.Mining and Logging	**73,400**	**73,400**	**74,000**	**0**	**0.0%**	**-600**	**-0.8%**
...Oil and Gas Extraction	35,500	35,500	36,100	0	0.0%	-600	-1.7%
...Support Activities for Mining	36,300	36,300	36,400	0	0.0%	-100	-0.3%
.Construction	**267,300**	**268,900**	**254,200**	**-1,600**	**-0.6%**	**13,100**	**5.2%**
..Construction of Buildings	69,200	69,500	65,600	-300	-0.4%	3,600	5.5%
..Heavy and Civil Engineering Construction	67,800	68,700	64,000	-900	-1.3%	3,800	5.9%
..Specialty Trade Contractors	130,300	130,700	124,600	-400	-0.3%	5,700	4.6%
.Manufacturing	**240,100**	**241,600**	**242,000**	**-1,500**	**-0.6%**	**-1,900**	**-0.8%**
..Durable Goods	153,000	153,900	151,400	-900	-0.6%	1,600	1.1%
...Fabricated Metal Product Manufacturing	55,700	55,800	54,800	-100	-0.2%	900	1.6%
...Machinery Manufacturing	40,400	40,200	40,000	200	0.5%	400	1.0%
....Agriculture, Construction, and Mining Machinery Mfg.	19,100	19,100	18,900	0	0.0%	200	1.1%
...Computer and Electronic Product Manufacturing	15,600	15,500	15,200	100	0.6%	400	2.6%
..Non-Durable Goods	87,100	87,700	90,600	-600	-0.7%	-3,500	-3.9%
...Petroleum and Coal Products Manufacturing	7,400	7,400	7,900	0	0.0%	-500	-6.3%
...Chemical Manufacturing	43,100	43,300	43,800	-200	-0.5%	-700	-1.6%
Service Providing	2,916,900	2,938,800	2,877,200	-21,900	-0.7%	39,700	1.4%
.Private Service Providing	2,475,800	2,474,100	2,439,600	1,700	0.1%	36,200	1.5%
..Trade, Transportation, and Utilities	**697,300**	**699,000**	**695,300**	**-1,700**	**-0.2%**	**2,000**	**0.3%**
...Wholesale Trade	178,000	178,700	178,800	-700	-0.4%	-800	-0.4%
....Merchant Wholesalers, Durable Goods	110,600	110,500	111,100	100	0.1%	-500	-0.5%
.....Prof. and Commercial Equip. Supplies Wholesalers	18,100	18,000	18,300	100	0.6%	-200	-1.1%
....Merchant Wholesalers, Nondurable Goods	54,900	55,700	56,100	-800	-1.4%	-1,200	-2.1%
...Retail Trade	319,800	321,200	319,700	-1,400	-0.4%	100	0.0%
....Motor Vehicle and Parts Dealers	45,000	45,300	45,300	-300	-0.7%	-300	-0.7%
....Bldg. Material and Garden Equip. and Supplies Dealers	24,000	24,200	24,500	-200	-0.8%	-500	-2.0%
....Food and Beverage Stores	77,700	78,100	76,900	-400	-0.5%	800	1.0%
....Health and Personal Care Stores	62,200	61,800	62,800	400	0.6%	-600	-1.0%
....Clothing and Clothing Accessories Stores	16,300	16,200	16,300	100	0.6%	0	0.0%
....General Merchandise Stores	45,900	45,600	46,500	300	0.7%	-600	-1.3%
.....Department Stores	22,600	22,600	22,700	0	0.0%	-100	-0.4%
.....Other General Merchandise Stores	24,900	24,800	25,400	100	0.4%	-500	-2.0%
...Transportation, Warehousing, and Utilities	199,500	199,100	196,800	400	0.2%	2,700	1.4%
....Utilities	25,400	25,300	24,400	100	0.4%	1,000	4.1%
.....Air Transportation	21,800	21,800	21,400	0	0.0%	400	1.9%
.....Truck Transportation	31,100	30,900	30,500	200	0.6%	600	2.0%
.....Pipeline Transportation	16,000	15,800	15,500	200	1.3%	500	3.2%
..Information	**27,400**	**27,400**	**29,000**	**0**	**0.0%**	**-1,600**	**-5.5%**
...Telecommunications	9,800	9,800	10,200	0	0.0%	-400	-3.9%
..Financial Activities	**175,900**	**177,400**	**179,100**	**-1,500**	**-0.8%**	**-3,200**	**-1.8%**
...Finance and Insurance	113,800	114,400	116,200	-600	-0.5%	-2,400	-2.1%
....Credit Intermediation and Related Activities	44,300	44,500	45,600	-200	-0.4%	-1,300	-2.9%
.....Depository Credit Intermediation	29,600	29,800	30,600	-200	-0.7%	-1,000	-3.3%
....Securities, Commodity Contracts, and Fin. Investments	20,600	20,700	21,100	-100	-0.5%	-500	-2.4%
....Insurance Carriers and Related Activities	48,900	49,200	49,500	-300	-0.6%	-600	-1.2%
...Real Estate and Rental and Leasing	62,100	63,000	62,900	-900	-1.4%	-800	-1.3%
..Professional and Business Services	**582,900**	**580,300**	**565,200**	**2,600**	**0.4%**	**17,700**	**3.1%**
...Professional, Scientific, and Technical Services	289,300	286,900	284,300	2,400	0.8%	5,000	1.8%
....Legal Services	35,800	35,500	35,300	300	0.8%	500	1.4%
....Accounting, Tax Preparation, Bookkeeping, and Payroll	26,900	26,500	27,400	400	1.5%	-500	-1.8%
....Architectural, Engineering, and Related Services	80,800	80,300	79,500	500	0.6%	1,300	1.6%
....Computer Systems Design and Related Services	42,200	41,600	42,600	600	1.4%	-400	-0.9%
...Management of Companies and Enterprises	43,400	43,400	43,800	0	0.0%	-400	-0.9%
...Admin. and Support and Waste Mgmt. and Remediation	250,200	250,000	237,100	200	0.1%	13,100	5.5%
....Administrative and Support Services	235,700	235,500	223,300	200	0.1%	12,400	5.6%
.....Employment Services	86,400	87,400	75,600	-1,000	-1.1%	10,800	14.3%
.....Services to Buildings and Dwellings	62,900	62,500	61,200	400	0.6%	1,700	2.8%
..Educational and Health Services	**475,800**	**474,800**	**466,000**	**1,000**	**0.2%**	**9,800**	**2.1%**
...Educational Services	70,400	71,700	70,000	-1,300	-1.8%	400	0.6%
...Health Care and Social Assistance	405,400	403,100	396,000	2,300	0.6%	9,400	2.4%
....Ambulatory Health Care Services	204,300	202,900	200,800	1,400	0.7%	3,500	1.7%
....Hospitals	102,600	102,000	100,400	600	0.6%	2,200	2.2%
..Leisure and Hospitality	**381,100**	**380,200**	**374,400**	**900**	**0.2%**	**6,700**	**1.8%**
...Arts, Entertainment, and Recreation	45,100	44,700	46,800	400	0.9%	-1,700	-3.6%
...Accommodation and Food Services	336,000	335,500	327,600	500	0.1%	8,400	2.6%
....Accommodation	28,000	28,200	27,900	-200	-0.7%	100	0.4%
....Food Services and Drinking Places	308,000	307,300	299,700	700	0.2%	8,300	2.8%
..Other Services	**135,400**	**135,000**	**130,600**	**400**	**0.3%**	**4,800**	**3.7%**
Government	**441,100**	**464,700**	**437,600**	**-23,600**	**-5.1%**	**3,500**	**0.8%**
.Federal Government	35,400	35,100	37,100	300	0.9%	-1,700	-4.6%
.State Government	103,200	104,000	100,400	-800	-0.8%	2,800	2.8%
..State Government Educational Services	55,300	56,200	53,700	-900	-1.6%	1,600	3.0%
.Local Government	302,500	325,600	300,100	-23,100	-7.1%	2,400	0.8%
..Local Government Educational Services	198,100	221,400	197,400	-23,300	-10.5%	700	0.4%