

# Houston Area Employment Situation

April 2026

## CURRENT EMPLOYMENT AND LOCAL AREA UNEMPLOYMENT STATISTICS

### Over-the-month Job Growth Proves Mixed with Fewer Sources of Over-the-year Growth

#### Total Nonfarm

##### Over-the-month Change

Houston MSA Total Nonfarm employment stood at 3,490,000 in April, up 5,000 jobs over the month, or 0.1 percent on a not-seasonally-adjusted basis (see Chart 1). A year ago Houston registered an over-the-month increase of 13,800 jobs. Prior to the pandemic, historically in the month of April, Total Nonfarm has on average added 7,400 jobs over the month, which indicates that this month's gains are moderately below the long-term average.

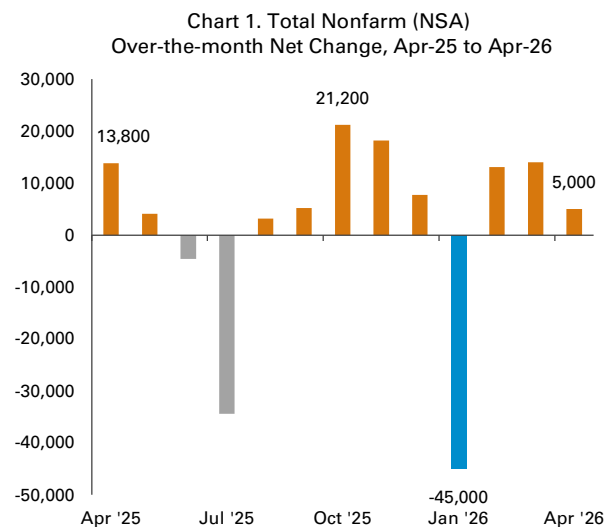
The primary drivers of this April's growth were increases in Professional and Business Services; Construction; and Leisure and Hospitality. Gains were also recorded in Trade, Transportation, and Utilities; Mining and Logging; and Private Education and Health Services. The net increase in jobs over the month was partially offset by losses in Financial Activities; Government; and Manufacturing. (see Chart 2). Houston MSA Total Nonfarm (seasonally adjusted) employment stood at 3,490,900, down -3,500 jobs over the month, or -0.1 percent vs. a historical average of 3,900. 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 Growth in April

- Professional and Business Services: 5,800
- Construction: 1,200
- Leisure and Hospitality: 700

##### Over-the-year Change

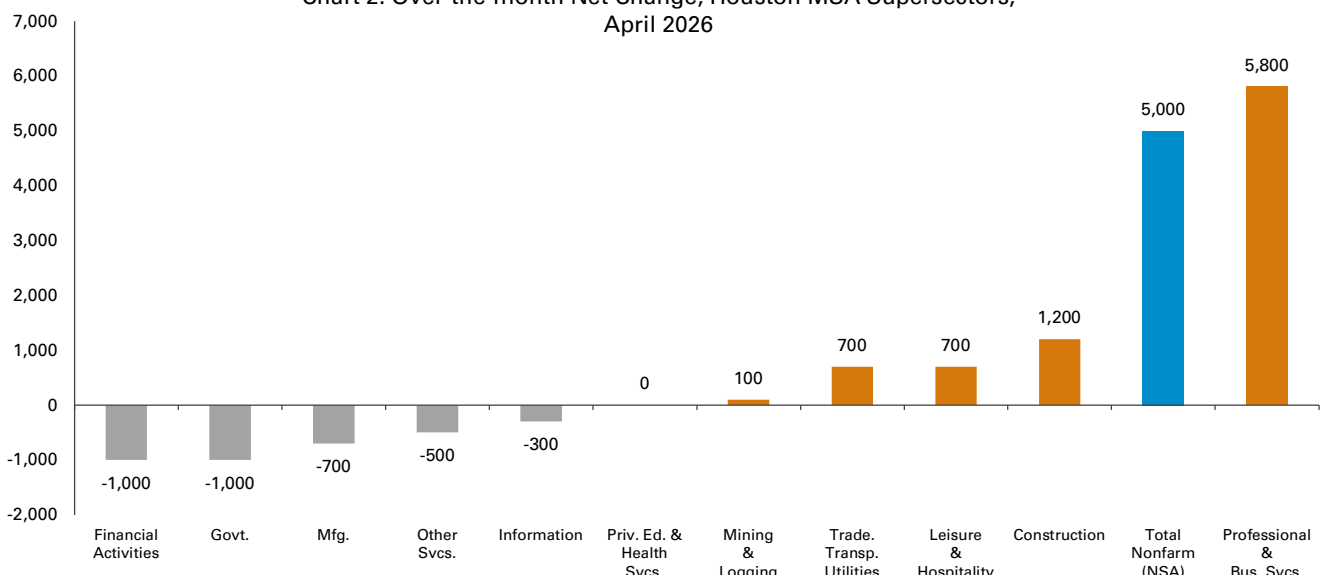
Over the year, Total Nonfarm employment was up 7,700 or 0.2 percent on a not-seasonally-adjusted basis and up 14,200 or 0.4 percent on a seasonally-adjusted basis (see NSA Chart 3). To compare, April 2025 saw a year-over-year gain of 52,000 jobs (NSA) from April 2024. Currently 7 out of 11 sectors show declines in employment year over year of which the top-three are Mining and Logging (-5,400); Financial Activities (-3,500); and Manufacturing (-3,000) (see Chart 4).



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

Total Nonfarm employment not-seasonally-adjusted now exceeds its February 2020 pre-pandemic level of 3,193,400 jobs by 296,600, or 9.3 percent (291,200 jobs, 9.1 percent above 3,199,700 seasonally adjusted).

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



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## Previous Month's Revisions

Total Nonfarm employment was revised downward by -2,400 jobs for a February to March smaller net gain of 14,000 compared to an original estimate of 16,400 jobs. A downward revision of -1,900 jobs in Professional and Business Services was the largest contributor followed by Trade, Transportation, and Utilities (-500) and Leisure and Hospitality (-300). Upward revisions in Private Education and Health Services (+300), Other Services (+300), and Manufacturing (+200) provided a partial offset of the overall downward revision to Total Nonfarm employment (see Chart 5).

**Top-3 Drivers of Over-the-year Job Growth in April**

- Construction: 8,900
- Professional and Business Services: 8,900
- Private Education and Health Services: 6,600

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

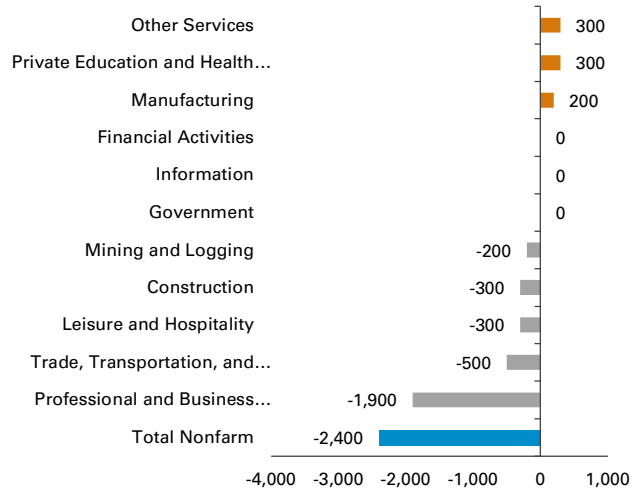


Chart 3. Total Nonfarm (NSA) Over-the-year Net Change, Apr-11 to Apr-26

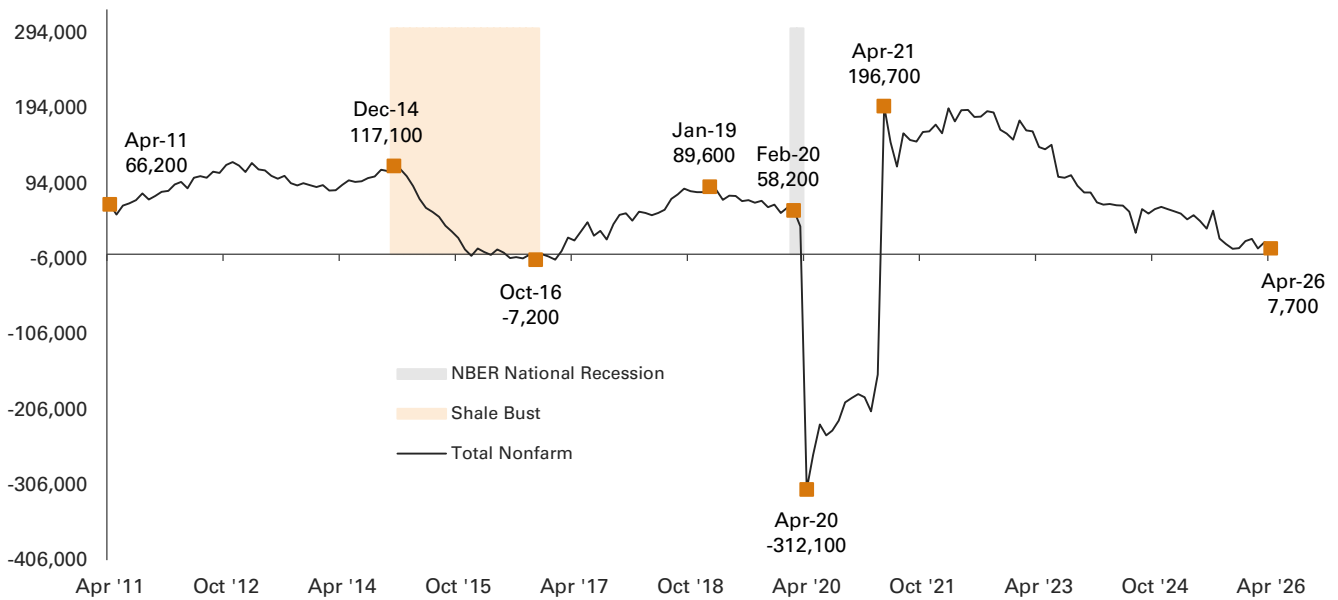
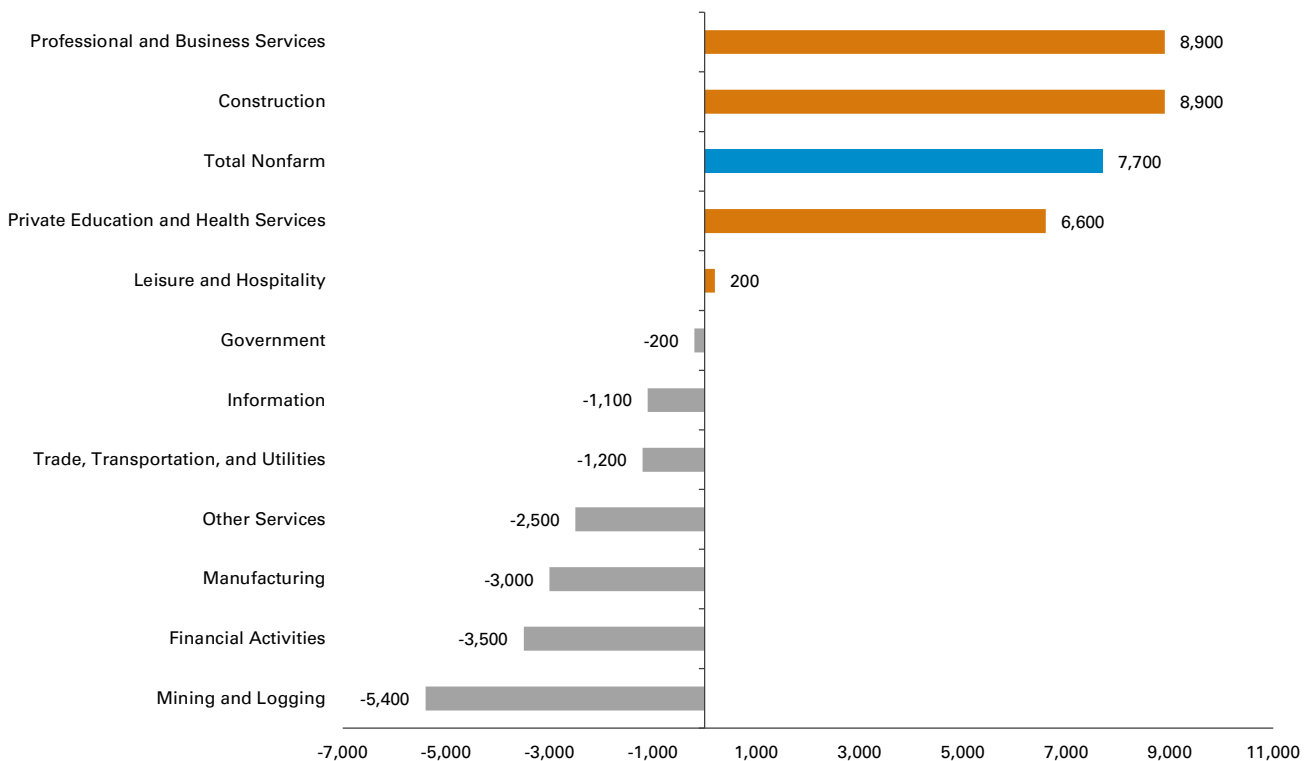


Chart 4. Over-the-year Net Change, Houston MSA Supersectors, April 2025 to April 2026



## Supplemental Commentary

April proved to be a mixed bag for Houston's job market after a promising March. Over the month, Not-seasonally-adjusted Total Nonfarm Employment rose a modest 5,000 jobs, or 0.1 percent. Removing seasonal jobs resulted in a net loss of -3,500 (-0.1 percent). Past seasonally-adjusted declines in the month of April have tended to coincide with known economic downturns such as the COVID-19 pandemic, the 2015-2016 Shale Bust, and the 2008 Financial Crisis. Revisions next month as well as next spring could alter the picture for the better, but for now Houston's job market continues to gradually approach stall speed mirroring the state as a whole. The Lone Star state managed to add 34,000 jobs not-seasonally-adjusted (+0.2 percent) and a mere 300 jobs seasonally adjusted (0.0 percent) in April. While it's little consolation, the U.S. as a whole didn't fare much better adding 926,000 jobs (NSA) over the month which was reduced to just 115,000 after seasonal adjustment signaling a job market treading water.

Returning to Houston's performance this April, more than two-thirds of the metro area's gross job growth over the month came from Professional and Business Services (+5,800) alone with respectable contributions coming from the sector's largest subcomponents Professional Scientific and Technical Services as well as Administrative and Support and Waste Management and Remediation Services. Given the ongoing debate regarding the impact of AI on professional services coupled with the high economic multiplier effect of these jobs, it's encouraging to see one of the traditional pillars of Houston's job market helping maintain some degree of momentum as we move into the second quarter of the year.

Construction continued its 2025 trend of also being a key driver Houston area growth with an unusual but not unprecedented increase of 1,200 jobs in April. Rounding out the top five were Leisure and Hospitality (+700) with its smallest April gain since 2017 excluding the pandemic, Trade Transportation and Utilities (+700), and Mining and Logging (+100) posting only its third over-the-month increase in the past year. At the same time, five sectors served as drags on job growth in April lead by Financial Activities (-1,000) with its worst April on record excluding 2020, and followed by Government (-1,000), Manufacturing (-700) posting typical seasonal declines, Other Services (-500) with only its fifth April decline ever, and Information (-300) marking four consecutive years in which job growth has been flat to negative in each of the first four months of the year.

Switching gears to over-the-year trends, the sources of Houston's job growth continue to be concentrated in just three sectors as of early to mid-2026: Professional and Business Services (+8,900), Construction (+8,900), and Private Education and Health Services (+6,600) with all gains from the latter coming from Healthcare and Social Assistance exclusively. These sectors are responsible for 99 percent of gross job gains in the past year and without their contributions, Houston's 7,700 over-the-year increase in Total Nonfarm Employment (NSA) simply wouldn't be possible. Moreover, the lack of breadth in terms of growing sectors means that the margin for error going forward is slim should the headwinds of lower yet still present tariffs and inflation driven by the recent spike in oil prices intensify.

Regarding the latter point, high oil prices have traditionally accelerated job growth in Mining and Logging, a.k.a. upstream oil and gas, and eventually the rest of Houston's economy. However since the Shale Bust, and reinforced by the Pandemic, job growth in this sector no longer responds to oil prices to the same extent. While at the time of writing, oil prices have not been elevated long enough to expect any meaningful change in oil and gas headcount, it is unlikely that we'll see such behavior given increased capital discipline among exploration and production companies and improvements to extraction technology. Case in point, after six years employment in the Mining and Logging sector has yet to exceed or even match levels seen in February 2020. While this might seem dire, there may be a silver lining: a sector less sensitive to the price of oil may reduce the likelihood of the boom and bust cycles that characterized the 1980s and mid-2010s. Over the years, many have argued for the diversification of Houston's job market to address this very issue. Given that upstream oil and gas's share of Houston's job market has fallen from around four percent at the height of the Shale Boom to around two percent today, one could argue that progress has been made towards that goal, even if unintentional. However, achieving diversification is not without tradeoffs. Other sectors of the economy must now perform more of the heavy lifting of generating jobs, which we did observe throughout the early years of the Pandemic meaning there is a recent precedent. At the same time, we should temper our expectations for those sectors to collectively amplify growth across the entire economy the way that oil and gas once did. Time will tell once the current spike in oil prices fades.

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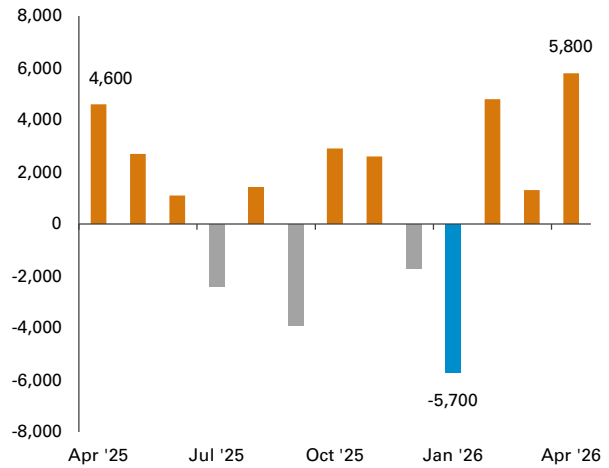
## GAINING INDUSTRY HIGHLIGHTS

### Professional and Business Services

#### Over-the-month Change

Professional and Business Services was the largest gaining sector over the month up 5,800 jobs, or 1.0 percent (see Chart 6). This was the third-largest gain in the month of April since records began in 1990. Historically in the month of April, Professional and Business Services has added an average of 1,600 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 3,500 jobs over the month. The second-largest contributor was Administrative and Support and Waste Management and Remediation Services, which added 2,100 jobs from March to April. Lastly, Management of Companies and Enterprises contributed, 200 jobs. Professional and Business Services employment was revised downward by -1,900 jobs for a February to March smaller net gain of 1,300 compared to an original estimate of 3,200 jobs.

Chart 6. Professional and Business Services (NSA)  
Over-the-month Net Change, Apr-25 to Apr-26



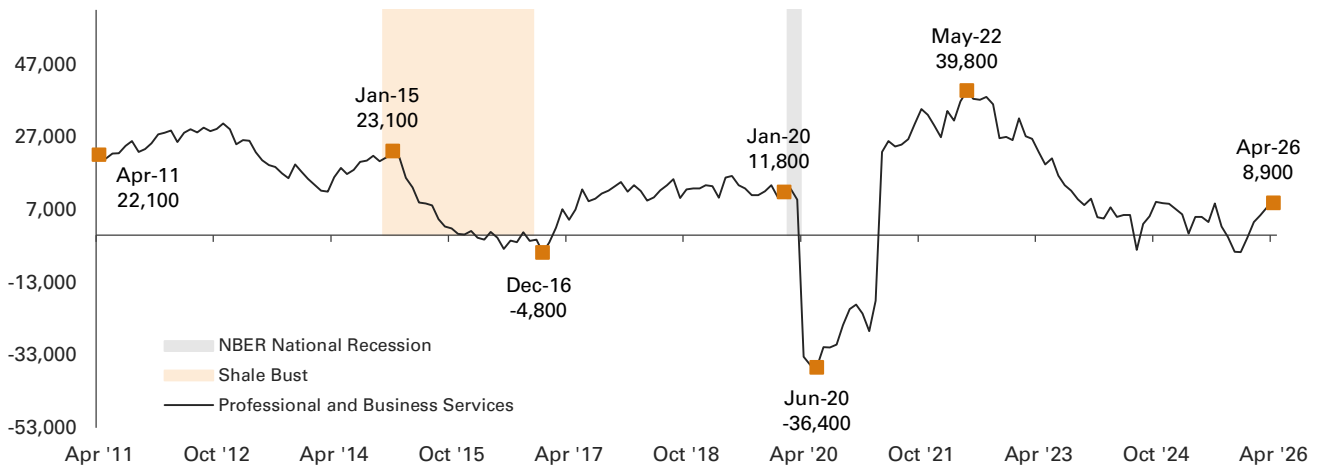
\*blue bar may reflect January typical seasonal decline/gain occurring each year

#### Over-the-year Change

Year over year, Professional and Business Services was up 8,900 jobs, or 1.6 percent (see Chart 7). This was the largest over-the-year gain since November 2024's increase of 8,900 jobs. Among sectors currently showing growth, this sector is the second-fastest growing in percentage terms across the Houston area. Furthermore, 36.2 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 7,700 jobs over the year. The second-largest contributor

was Professional, Scientific, and Technical Services, which added 1,700 jobs from April a year ago. Lastly, Management of Companies and Enterprises offset a portion of the sector's gains with a loss of -500 jobs. Total Professional and Business Services employment (NSA) now exceeds its February 2020 pre-pandemic level of 514,600 jobs by 58,100, or 11.3 percent. At the same time, the sector's share of Houston area Total Nonfarm Employment has risen from 16.2 percent to 16.4 percent over the past year.

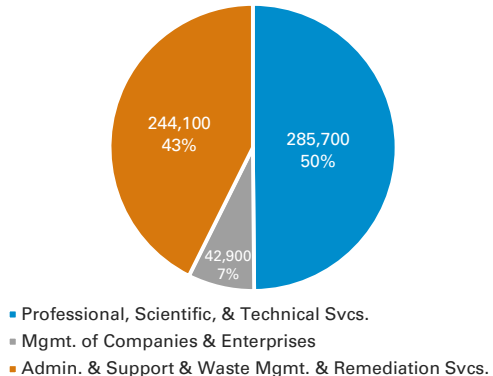
Chart 7. Professional and Business Services (NSA)  
Over-the-year Net Change, Apr-11 to Apr-26



#### About This Sector

This sector is composed of establishments specializing in professional, scientific, and technical activities; management 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 8).

Chart 8. Employment in Component Industries of Professional and Business Services Sector - April 2026

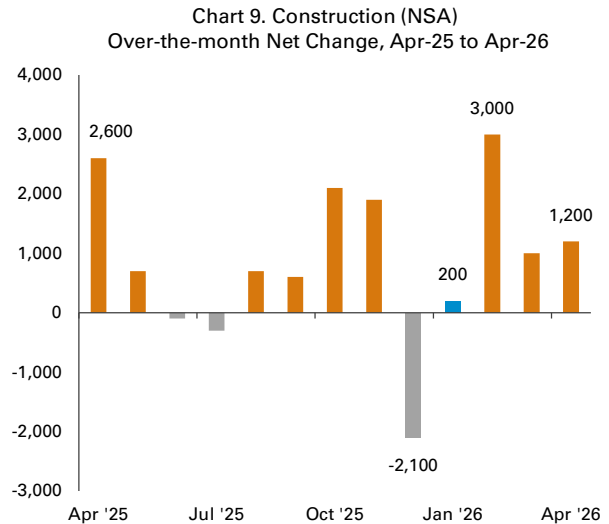


## GAINING INDUSTRY HIGHLIGHTS

### Construction

#### Over-the-month Change

Construction was the second-largest gaining sector over the month up 1,200 jobs, or 0.5 percent (see Chart 9). Historically in the month of April, Construction has lost an average of -400 jobs over the month, which indicates that this month's gains are substantially in contrast to the long-term average decline. Specialty Trade Contractors was the largest contributor to the overall sector's increase, up 1,000 jobs over the month. The second-largest contributor was Construction of Buildings, which added 500 jobs from March to April. Lastly, Heavy and Civil Engineering Construction offset a portion of the sector's gains with a loss of -300 jobs. Construction employment was revised downward by -300 jobs for a February to March smaller net gain of 1,000 compared to an original estimate of 1,300 jobs.



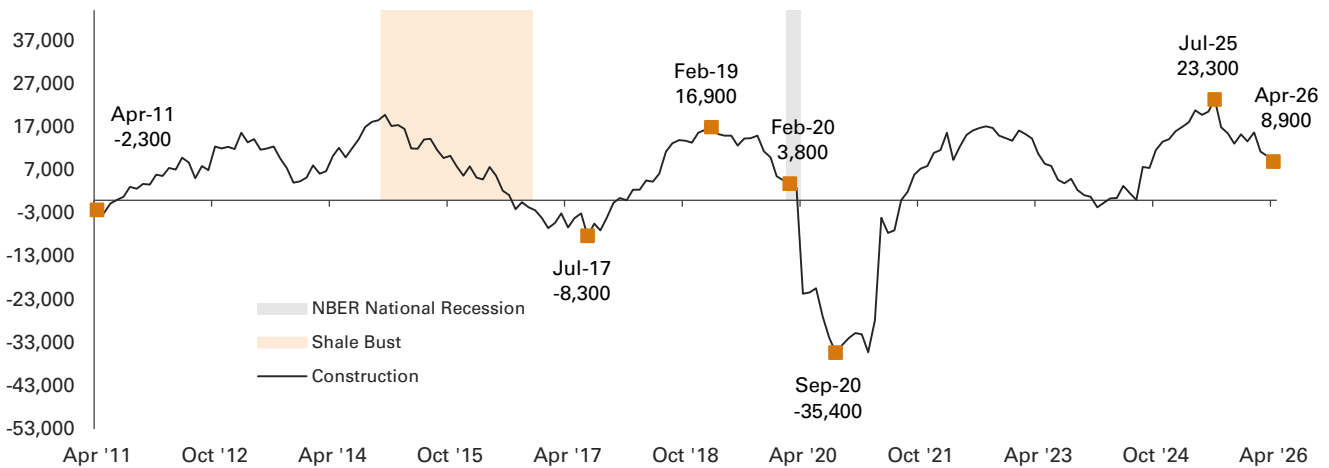
\*blue bar may reflect January typical seasonal decline/gain occurring each year

#### Over-the-year Change

Year over year, Construction was up 8,900 jobs, or 3.5 percent (see Chart 10). Among sectors currently showing growth, this sector is the fastest-growing in percentage terms across the Houston area. Furthermore, 36.2 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 4,500 jobs over the year. The second-largest contributor was Heavy and Civil Engineering Construction, which added 2,800 jobs from April a year ago. Lastly, Construction of Buildings

contributed, 1,600 jobs. Total Construction employment (NSA) now exceeds its February 2020 pre-pandemic level of 237,400 jobs by 25,400, or 10.7 percent. At the same time, the sector's share of Houston area Total Nonfarm Employment has risen from 7.3 percent to 7.5 percent over the past year.

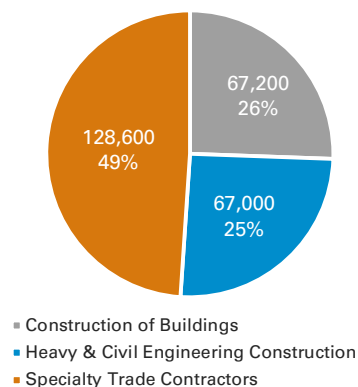
Chart 10. Construction (NSA) Over-the-year Net Change, Apr-11 to Apr-26



#### 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 11).

Chart 11. Employment in Component Industries of Construction Sector - April 2026

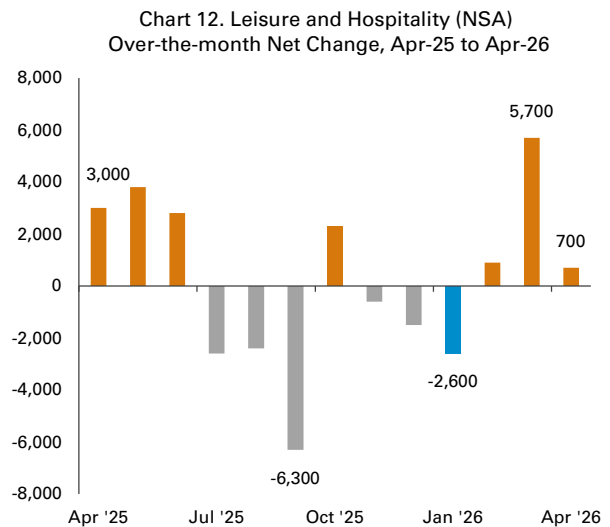


## GAINING INDUSTRY HIGHLIGHTS

### Leisure and Hospitality

#### Over-the-month Change

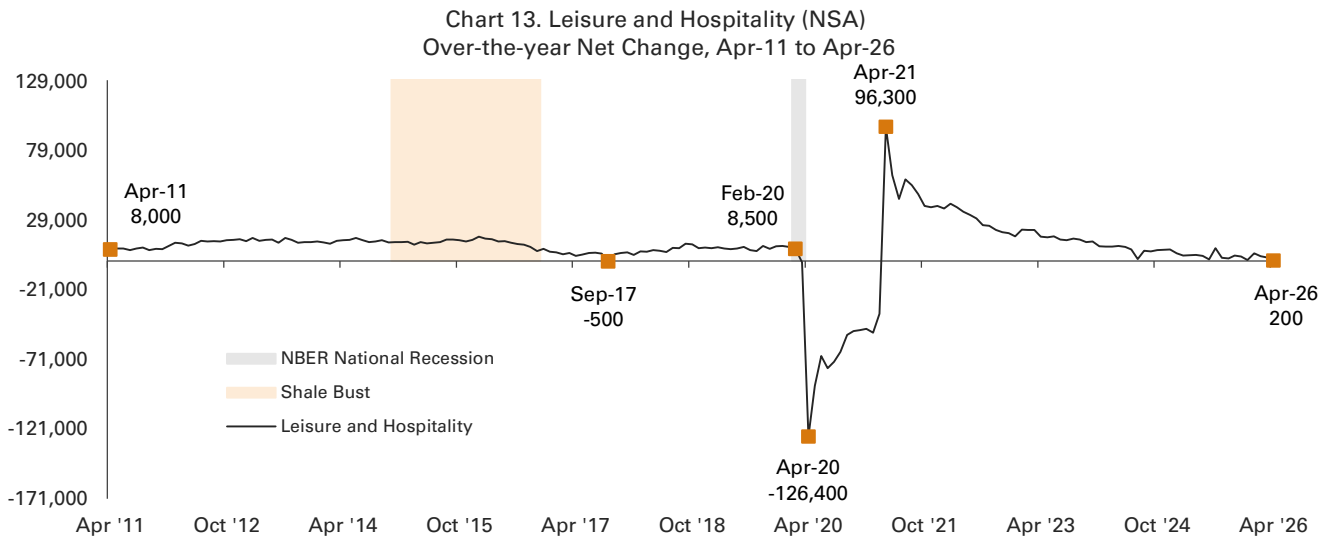
Leisure and Hospitality was the third-largest gaining sector over the month up 700 jobs, or 0.2 percent (see Chart 12). Historically in the month of April, Leisure and Hospitality has added an average of 2,200 jobs over the month, which indicates that this month's gains are substantially below the long-term average. Arts, Entertainment, and Recreation was the largest contributor to the overall sector's increase, up 700 jobs over the month. One component industry, Accommodation and Food Services, saw no change from March to April. Leisure and Hospitality employment was revised downward by -300 jobs for a February to March smaller net gain of 5,700 compared to an original estimate of 6,000 jobs.



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

#### Over-the-year Change

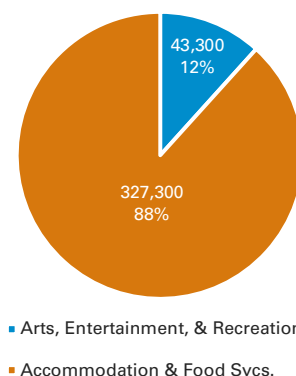
Year over year, Leisure and Hospitality was up 200 jobs, or 0.1 percent (see Chart 13). Arts, Entertainment, and Recreation was the largest contributor to the overall sector's increase, up 800 jobs over the year. One component industry that provided a partial offset was Accommodation and Food Services, which lost -600 jobs from April a year ago. Total Leisure and Hospitality employment (NSA) now exceeds its February 2020 pre-pandemic level of 334,600 jobs by 36,000, or 10.8 percent. At the same time, the sector's share of Houston area Total Nonfarm Employment has remained constant at 10.6 percent over the past year.



#### About This Sector

This sector is composed of establishments that produce and promote in live performances, events, or 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 14).

Chart 14. Employment in Component Industries of Leisure and Hospitality Sector - April 2026



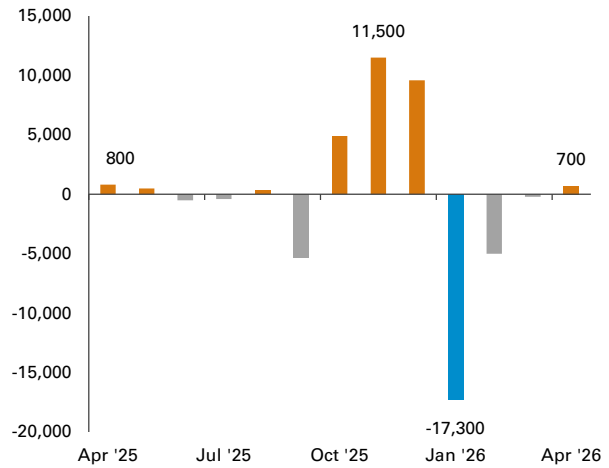
## GAINING INDUSTRY HIGHLIGHTS

### Trade, Transportation, and Utilities

#### Over-the-month Change

Trade, Transportation, and Utilities was the fourth-largest gaining sector over the month up 700 jobs, or 0.1 percent (see Chart 15). Historically in the month of April, Trade, Transportation, and Utilities has added an average of 500 jobs over the month, which indicates that this month's gains are slightly above the long-term average. Retail Trade was the largest contributor to the overall sector's increase, up 1,900 jobs over the month. One component industry that provided a partial offset was Wholesale Trade, which lost -500 jobs from March to April. Lastly, Transportation, Warehousing, and Utilities offset a portion of the sector's gains with a loss of -700 jobs. Trade, Transportation, and Utilities employment was revised downward by -500 jobs for a February to March complete erasure of gains leaving a net loss of -200 compared to an original estimate of 300 jobs.

Chart 15. Trade, Transportation, and Utilities (NSA)  
Over-the-month Net Change, Apr-25 to Apr-26



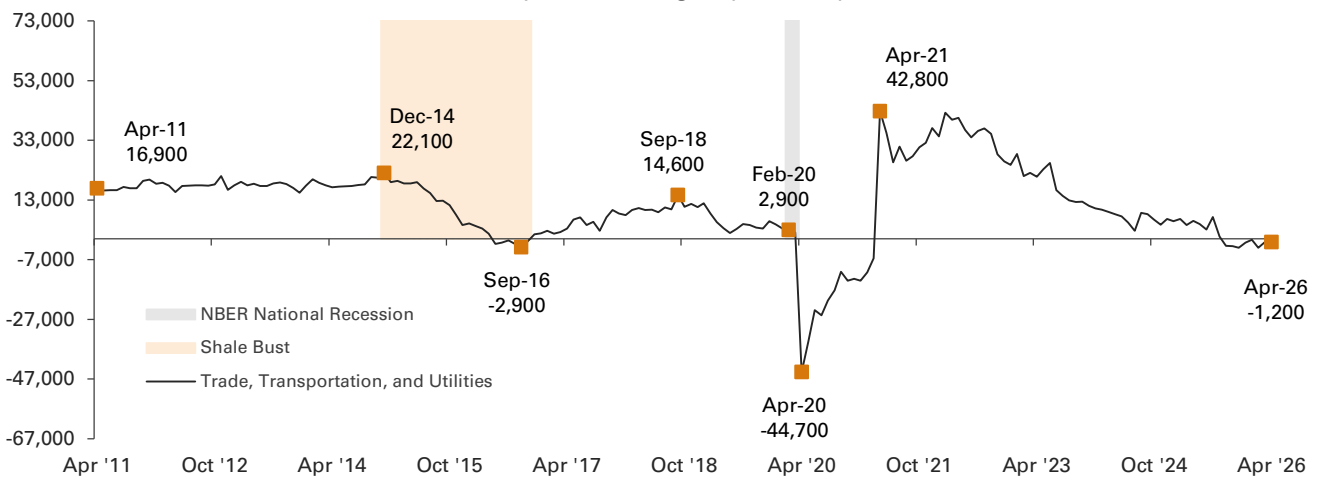
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#### Over-the-year Change

Year over year, Trade, Transportation, and Utilities was down -1,200 jobs, or -0.2 percent (see Chart 16). Wholesale Trade was the largest contributor to the overall sector's decline, down -2,300 jobs over the year. One component industry, Retail Trade, saw no change from April a year ago. Lastly, Transportation, Warehousing, and Utilities offset a portion of the sector's losses with a gain of 1,100 jobs. Total Trade, Transportation, and Utilities employment (NSA) now exceeds its February 2020 pre-pandemic level of 628,700 jobs by 65,800, or 10.5 percent. At the same time, the sector's share of Houston area Total Nonfarm Employment

has remained constant at 20.0 percent over the past year.

Chart 16. Trade, Transportation, and Utilities (NSA)  
Over-the-year Net Change, Apr-11 to Apr-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 17).

Chart 17. Employment in Component Industries of  
Trade, Transportation, and Utilities Sector - April  
2026

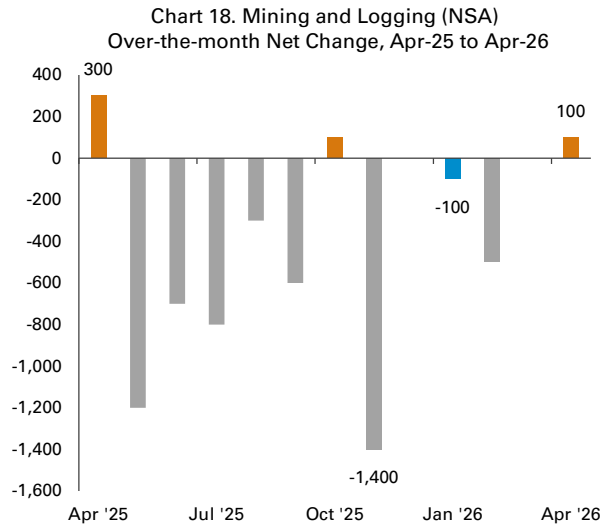


## GAINING INDUSTRY HIGHLIGHTS

### Mining and Logging

#### Over-the-month Change

Mining and Logging was the fifth-largest gaining sector over the month up 100 jobs, or 0.1 percent (see Chart 18). Historically in the month of April, Mining and Logging has seen no change in jobs over the month, which indicates that this month's gains are substantially above the long-term average. Other Mining and Logging Undefined was the largest contributor to the overall sector's increase, up 100 jobs over the month. The second-largest contributor was Support Activities for Mining, which added 100 jobs from March to April. Lastly, Oil and Gas Extraction offset a portion of the sector's gains with a loss of -100 jobs. Mining and Logging employment was revised downward by -200 jobs for a February to March complete loss of gains resulting in a net change of zero compared to an original estimate of 200 jobs.



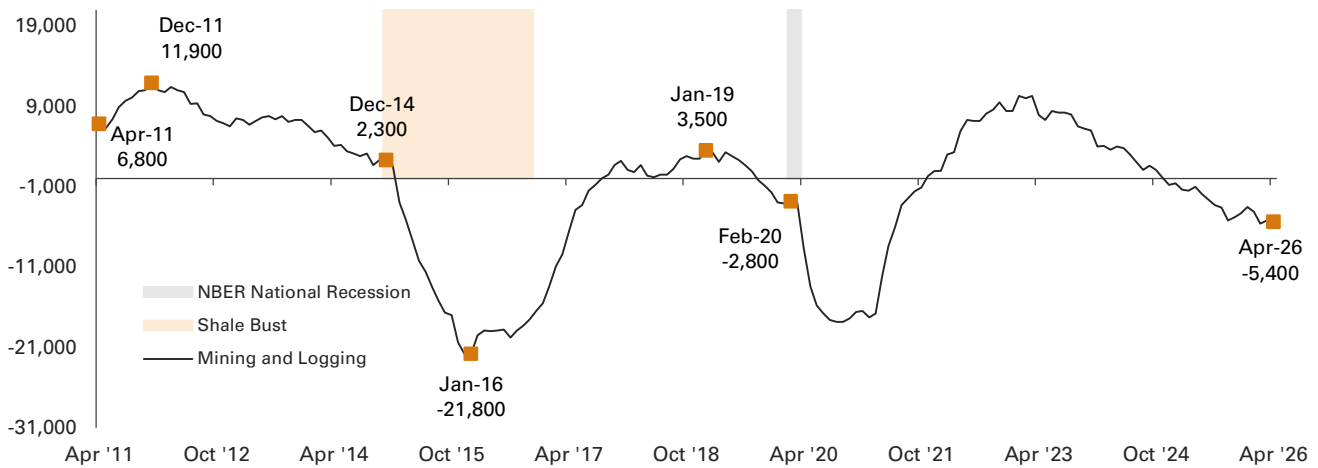
\*blue bar may reflect January typical seasonal decline/gain occurring each year

#### Over-the-year Change

Year over year, Mining and Logging was down -5,400 jobs, or -7.0 percent (see Chart 19). Among sectors currently showing contraction, this sector is the fastest declining in percentage terms across the Houston area. Furthermore, 32.0 percent of total (gross) jobs lost across the region over the past year can be attributed to Mining and Logging. Support Activities for Mining was the largest contributor to the overall sector's decline, down -2,700 jobs over the year. The second-largest declining contributor was Oil and Gas Extraction, which lost -2,600 jobs from April a year ago. Lastly, Other Mining and Logging Undefined subtracted, -100 jobs.

Total Mining and Logging employment (NSA) remains -7,100 jobs, or -9.1 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 fallen from 2.2 percent to 2.0 percent over the past year.

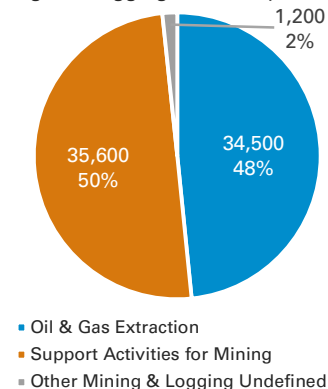
Chart 19. Mining and Logging (NSA) Over-the-year Net Change, Apr-11 to Apr-26



#### 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 50 percent (see Chart 20).

Chart 20. Employment in Component Industries of Mining and Logging Sector - April 2026

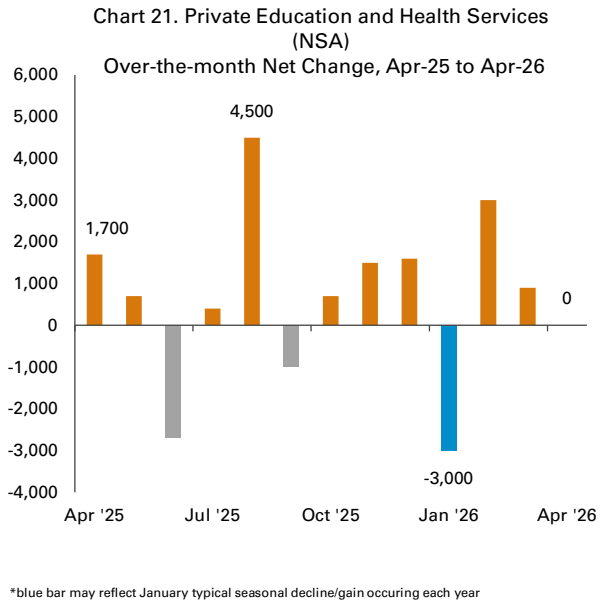


## GAINING INDUSTRY HIGHLIGHTS

### Private Education and Health Services

#### Over-the-month Change

Private Education and Health Services was unchanged over the month. (see Chart 21). Historically in the month of April, Private Education and Health Services has added an average of 1,000 jobs over the month, which indicates that this month's net zero change is substantially below the long-term average. Health Care and Social Assistance was the largest source of gains despite no change to the overall sector, up 300 jobs over the month. Private Education and Health Services employment was revised upward by 300 jobs for a February to March larger net gain of 900 compared to an original estimate of 600 jobs.

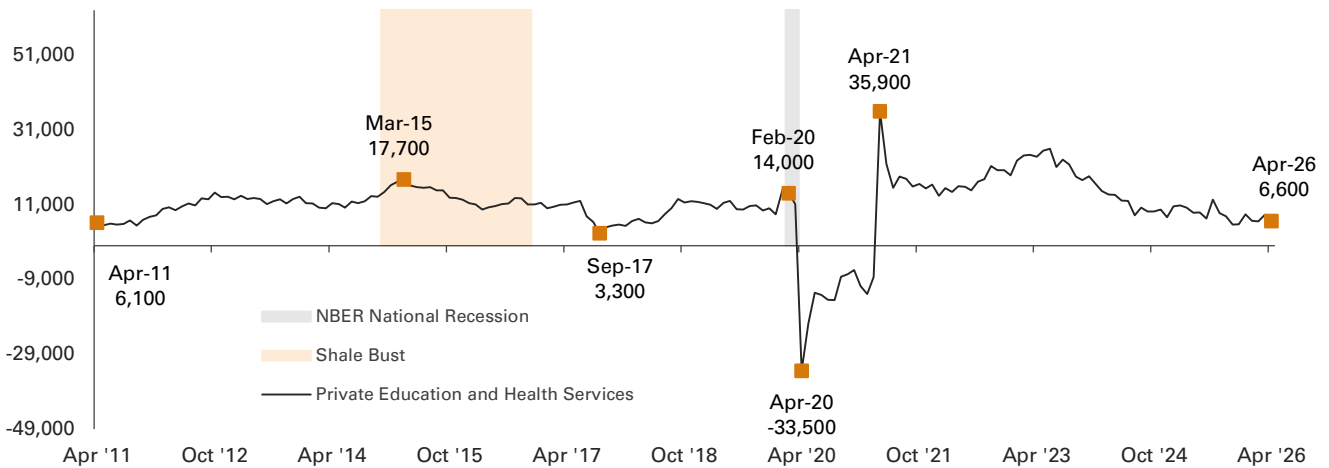


#### Over-the-year Change

Year over year, Private Education and Health Services was up 6,600 jobs, or 1.4 percent (see Chart 22). Among sectors currently showing growth, this sector is the third-fastest growing in percentage terms across the Houston area. Furthermore, 26.8 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 7,300 jobs over the year. One component industry that provided a partial offset was Private

Educational Services, which lost -700 jobs from April a year ago. Total Private Education and Health Services employment (NSA) now exceeds its February 2020 pre-pandemic level of 414,600 jobs by 59,600, or 14.4 percent. At the same time, the sector's share of Houston area Total Nonfarm Employment has risen from 13.4 percent to 13.6 percent over the past year.

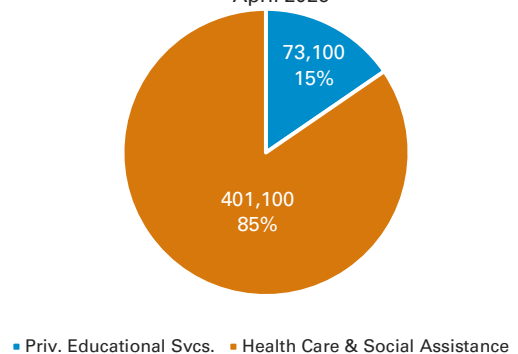
Chart 22. Private Education and Health Services (NSA)  
Over-the-year Net Change, Apr-11 to Apr-26



#### 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 23).

Chart 23. Employment in Component Industries of Private Education and Health Services Sector - April 2026

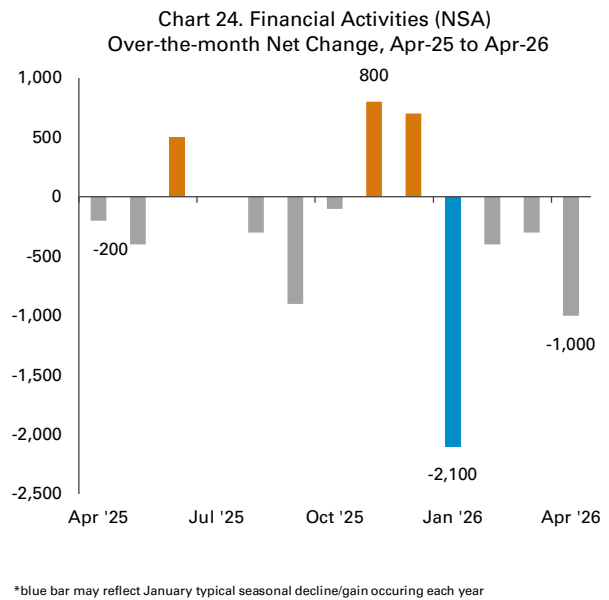


DECLINING INDUSTRY HIGHLIGHTS

Financial Activities

Over-the-month Change

Financial Activities was the largest declining sector over the month down -1,000 jobs, or -0.6 (see Chart 24). This was the second-largest decline in the month of April since records began in 1990. Historically in the month of April, Financial Activities has added an average of 300 jobs over the month, which indicates that this month's losses are substantially in contrast to the long-term average gain. Finance and Insurance was the largest contributor to the overall sector's decline, down -500 jobs over the month. The second-largest declining contributor was Real Estate and Rental and Leasing, which lost -500 jobs from March to April. Financial Activities employment saw no revision from February to March leaving the previous month's original decrease of -300 intact.

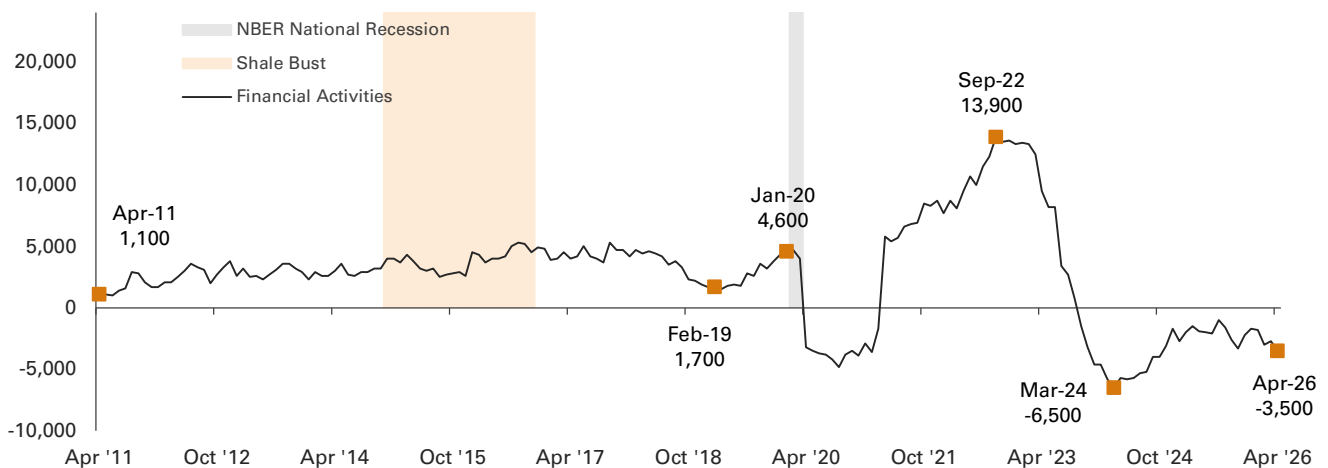


Over-the-year Change

Year over year, Financial Activities was down -3,500 jobs, or -2.0 percent (see Chart 25). This was the largest over-the-year decline since October 2024's decrease of -4,000 jobs. Among sectors currently showing contraction, this sector is the third-fastest declining in percentage terms across the Houston area. Furthermore, 20.7 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 -2,500 jobs over the year. The second-largest declining contributor was

Real Estate and Rental and Leasing, which lost -1,000 jobs from April a year ago. Total Financial Activities employment (NSA) now exceeds its February 2020 pre-pandemic level of 169,200 jobs by 6,300, or 3.7 percent. At the same time, the sector's share of Houston area Total Nonfarm Employment has fallen from 5.1 percent to 5.0 percent over the past year.

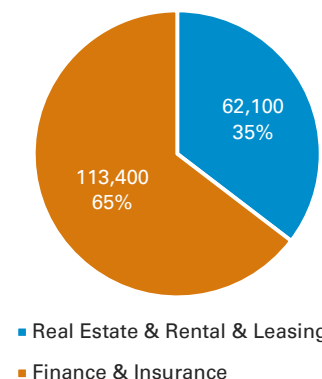
Chart 25. Financial Activities (NSA) Over-the-year Net Change, Apr-11 to Apr-26



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 26).

Chart 26. Employment in Component Industries of Financial Activities Sector - April 2026

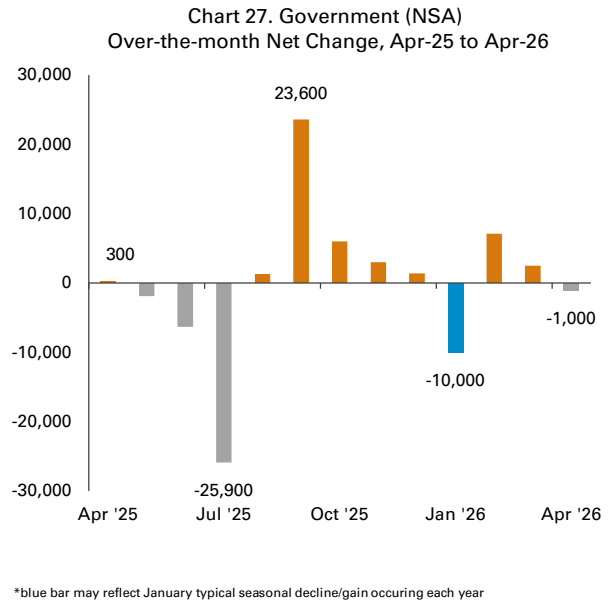


## DECLINING INDUSTRY HIGHLIGHTS

### Government

#### Over-the-month Change

Government was the second-largest declining sector over the month down -1,000 jobs, or -0.2 (see Chart 27). Historically in the month of April, Government has added an average of 800 jobs over the month, which indicates that this month's losses are substantially in contrast to the long-term average gain. Local Government was the largest contributor to the overall sector's decline, down -900 jobs over the month. The second-largest declining contributor was State Government, which lost -300 jobs from March to April. Lastly, Federal Government offset a portion of the sector's losses with a gain of 200 jobs. Government employment saw no revision from February to March leaving the previous month's original increase of 2,500 intact.

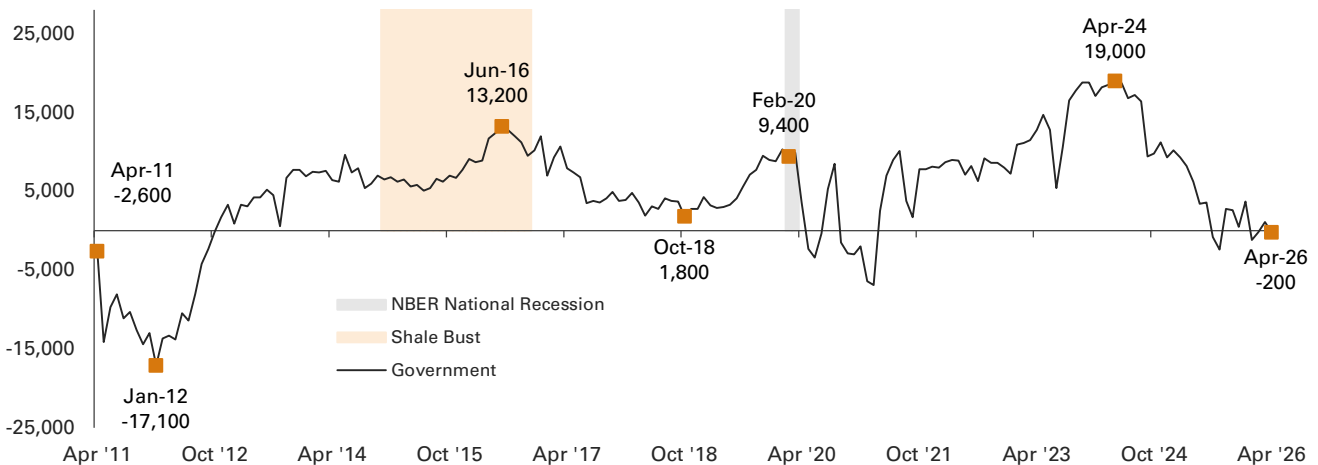


#### Over-the-year Change

Year over year, Government was down -200 jobs, or 0.0 percent (see Chart 28). This was the third-largest over-the-year decline in April since records began in 1990. Federal Government was the largest contributor to the overall sector's decline, down -2,400 jobs over the year. The second-largest declining contributor was Local Government, which lost -600 jobs from April a year ago. Lastly, State Government offset a portion of the sector's losses with a gain of 2,800 jobs. Total Government employment (NSA) now exceeds its February 2020 pre-pandemic level of 429,300 jobs by

42,200, or 9.8 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.

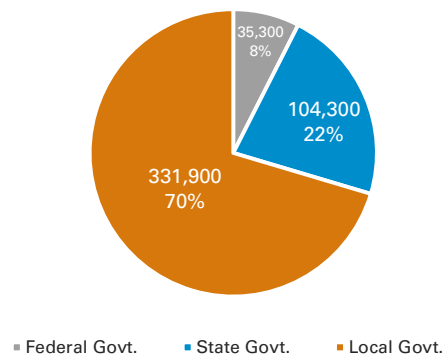
**Chart 28. Government (NSA)**  
Over-the-year Net Change, Apr-11 to Apr-26



#### 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 70 percent (see Chart 29).

**Chart 29. Employment in Component Industries of Government Sector - April 2026**

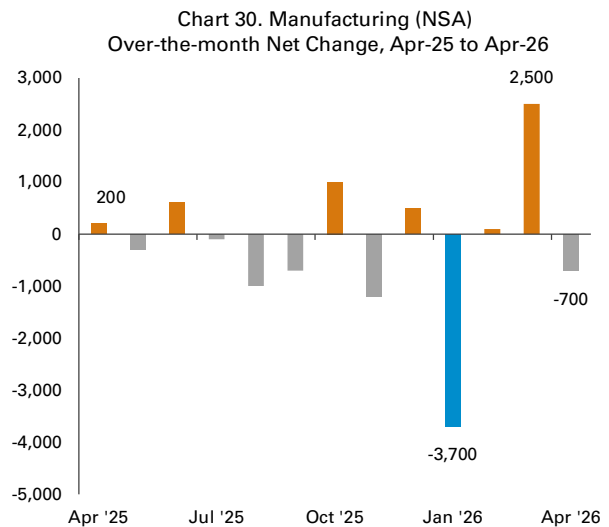


## DECLINING INDUSTRY HIGHLIGHTS

### Manufacturing

#### Over-the-month Change

Manufacturing was the third-largest declining sector over the month down -700 jobs, or -0.3 (see Chart 30). Historically in the month of April, Manufacturing has lost an average of -300 jobs over the month, which indicates that this month's losses are moderately larger than the long-term average decline. Non-Durable Goods was the largest contributor to the overall sector's decline, down -1,300 jobs over the month. One component industry that provided a partial offset was Durable Goods, which gained 600 jobs from March to April. Manufacturing employment was revised upward by 200 jobs for a February to March larger net gain of 2,500 compared to an original estimate of 2,300 jobs.



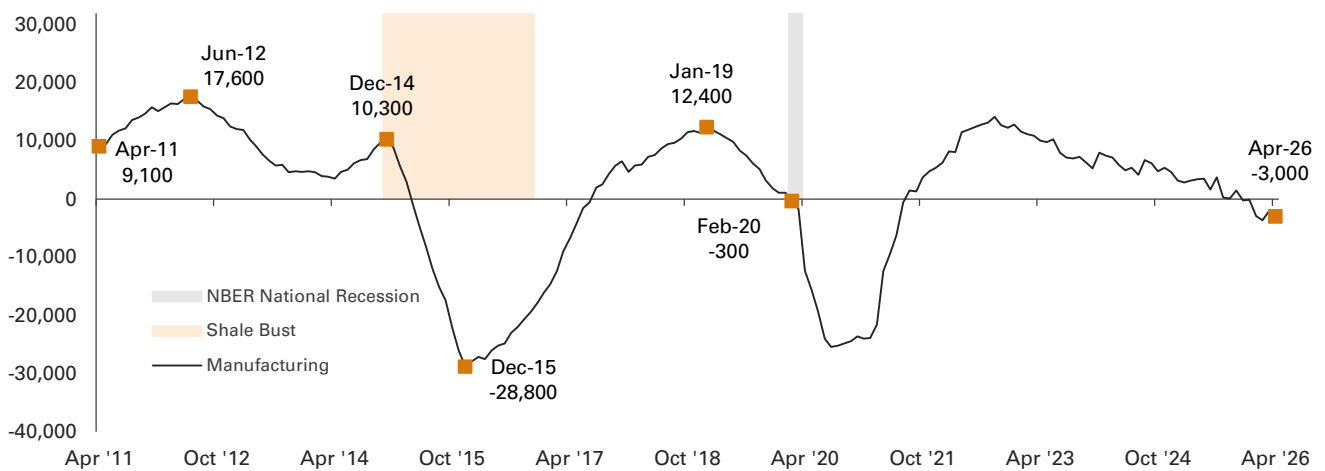
\*blue bar may reflect January typical seasonal decline/gain occurring each year

#### Over-the-year Change

Year over year, Manufacturing was down -3,000 jobs, or -1.2 percent (see Chart 31). Furthermore, 17.8 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 -3,700 jobs over the year. One component industry that provided a partial offset was Durable Goods, which gained 700 jobs from April a year ago. Total Manufacturing employment (NSA) now exceeds its February 2020 pre-pandemic level of 234,700 jobs by 4,100, or 1.7 percent. At the same time, the sector's

share of Houston area Total Nonfarm Employment has fallen from 6.9 percent to 6.8 percent over the past year.

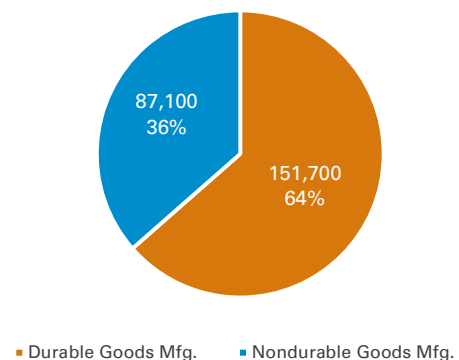
Chart 31. Manufacturing (NSA) Over-the-year Net Change, Apr-11 to Apr-26



#### 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 32).

Chart 32. Employment in Component Industries of Manufacturing Sector - April 2026

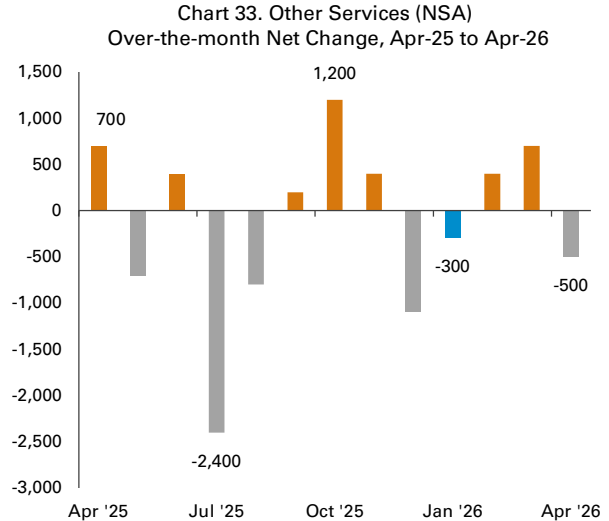


## DECLINING INDUSTRY HIGHLIGHTS

### Other Services

#### Over-the-month Change

Other Services also saw a decrease over the month down -500 jobs, or -0.4 (see Chart 33). This was the second-largest decline in the month of April since records began in 1990. Historically in the month of April, Other Services has added an average of 1,700 jobs over the month, which indicates that this month's losses are substantially in contrast to the long-term average gain. NOTE: No subsector is published at the MSA level by the CES survey. See below for additional information. Other Services employment was revised upward by 300 jobs for a February to March larger net gain of 700 compared to an original estimate of 400 jobs.



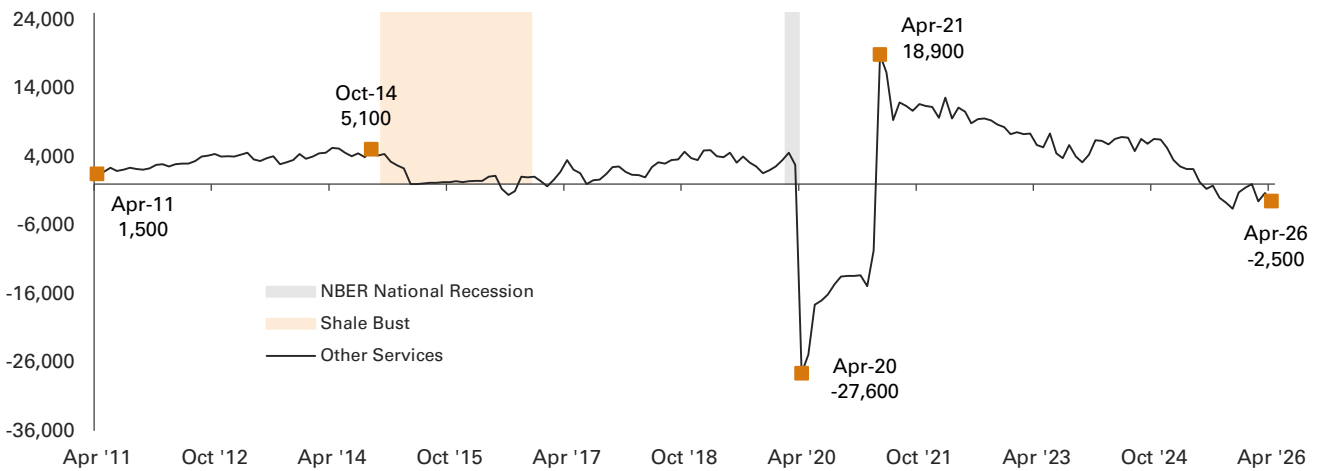
\*blue bar may reflect January typical seasonal decline/gain occurring each year

#### Over-the-year Change

Year over year, Other Services was down -2,500 jobs, or -1.9 percent (see Chart 34). This was the second-largest over-the-year decline in the month of April since records began in 1990. Furthermore, 14.8 percent of total (gross) jobs lost across the region over the past year can be attributed to Other Services. NOTE: No subsector is published at the MSA level by the CES survey. See below for additional information. Total Other Services employment (NSA) now exceeds its February 2020 pre-pandemic level of 119,200 jobs by 11,600, or 9.7 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.

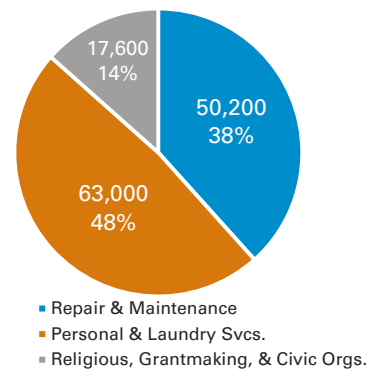
Chart 34. Other Services (NSA) Over-the-year Net Change, Apr-11 to Apr-26



### 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 35). Across the Houston MSA, the concentration of jobs in the overall Other Services sector is 1 percent less than the national average.

Chart 35. Employment in Component Industries of Other Services Sector - April 2026



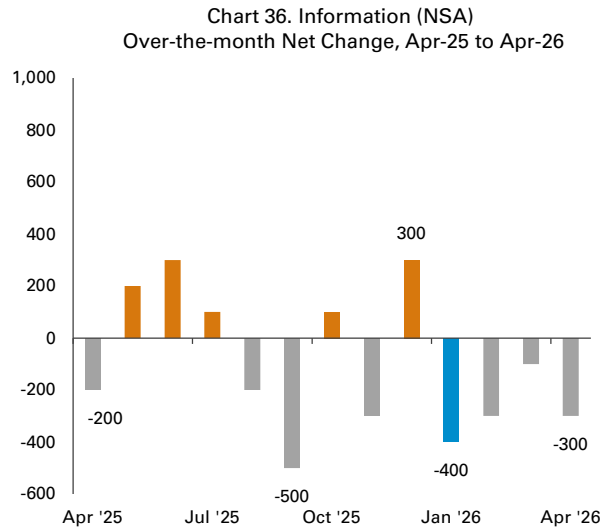
\*estimated proportions based QCEW covered and NES self-employment

## DECLINING INDUSTRY HIGHLIGHTS

### Information

#### Over-the-month Change

Information also saw a decrease over the month down -300 jobs, or -1.1 (see Chart 36). Historically in the month of April, Information has lost an average of -100 jobs over the month, which indicates that this month's losses are on par with the long-term average. Other Information Undefined was the largest contributor to the overall sector's decline, down -400 jobs over the month. One component industry that provided a partial offset was Telecommunications, which gained 100 jobs from March to April. Information employment saw no revision from February to March leaving the previous month's original decrease of -100 intact.



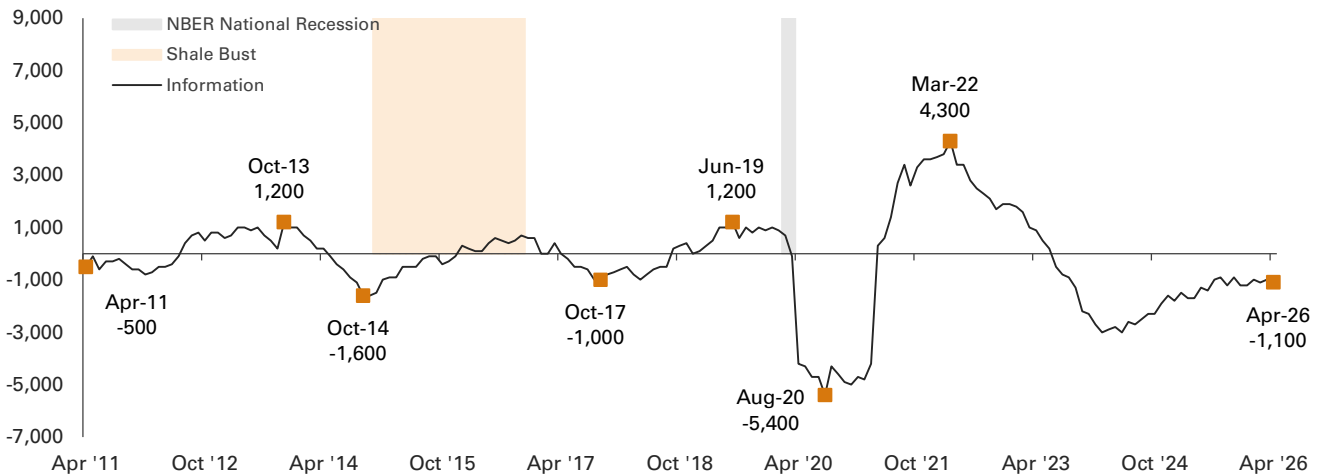
\*blue bar may reflect January typical seasonal decline/gain occurring each year

#### Over-the-year Change

Year over year, Information was down -1,100 jobs, or -3.9 percent (see Chart 37). Among sectors currently showing contraction, this sector is the second-fastest declining in percentage terms across the Houston area. Other Information Undefined was the largest contributor to the overall sector's decline, down -900 jobs over the year. The second-largest declining contributor was Telecommunications, which lost -200 jobs from April a year ago. Total Information employment (NSA) remains -5,400 jobs, or -16.5 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.

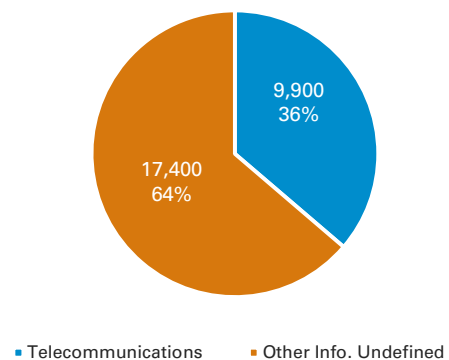
Chart 37. Information (NSA) Over-the-year Net Change, Apr-11 to Apr-26



#### 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 38).

Chart 38. Employment in Component Industries of Information Sector - April 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 4.3 percent in April, down from March's 4.4 percent and up from 4.0 percent a year ago. This was above the statewide rate of 4.0 percent and above the national rate of 4.0 percent. An over-the-month decline in April is typical having occurred nearly 85 percent of the time over the past three decades 167,896 individuals were unemployed in Houston in April, down from March's 171,480 and up from 156,166 in April 2025 (see Charts 39 and 40).

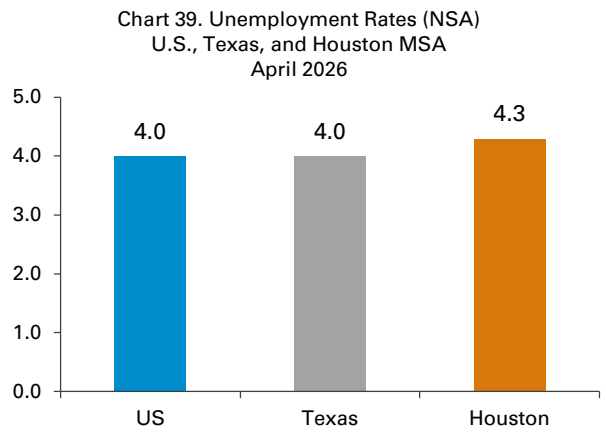
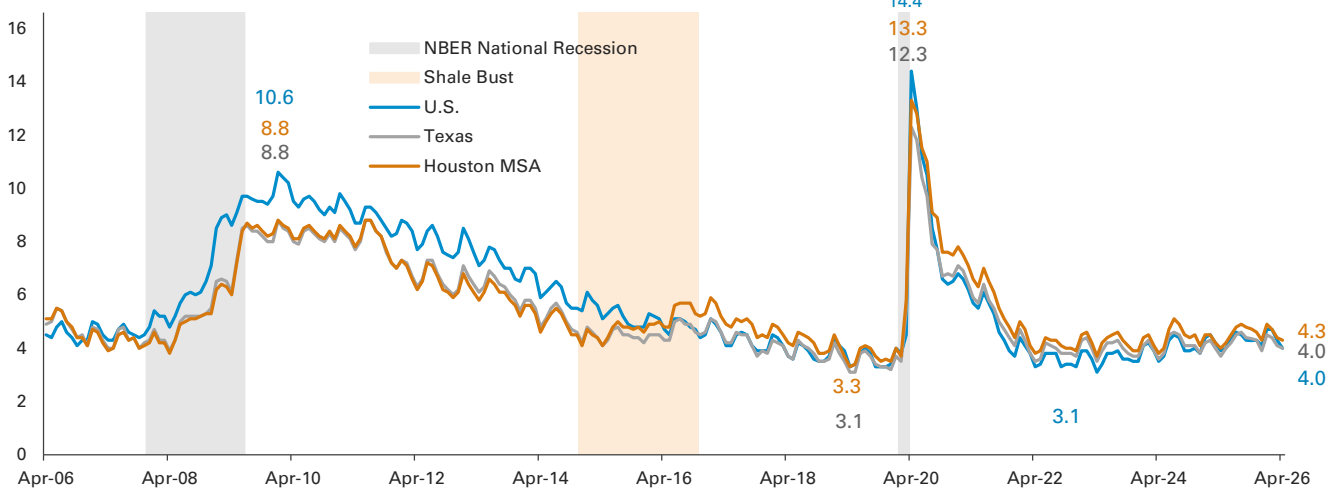


Chart 40. Unemployment Rates U.S., Texas, and Houston MSA (NSA) April 2006 to April 2026

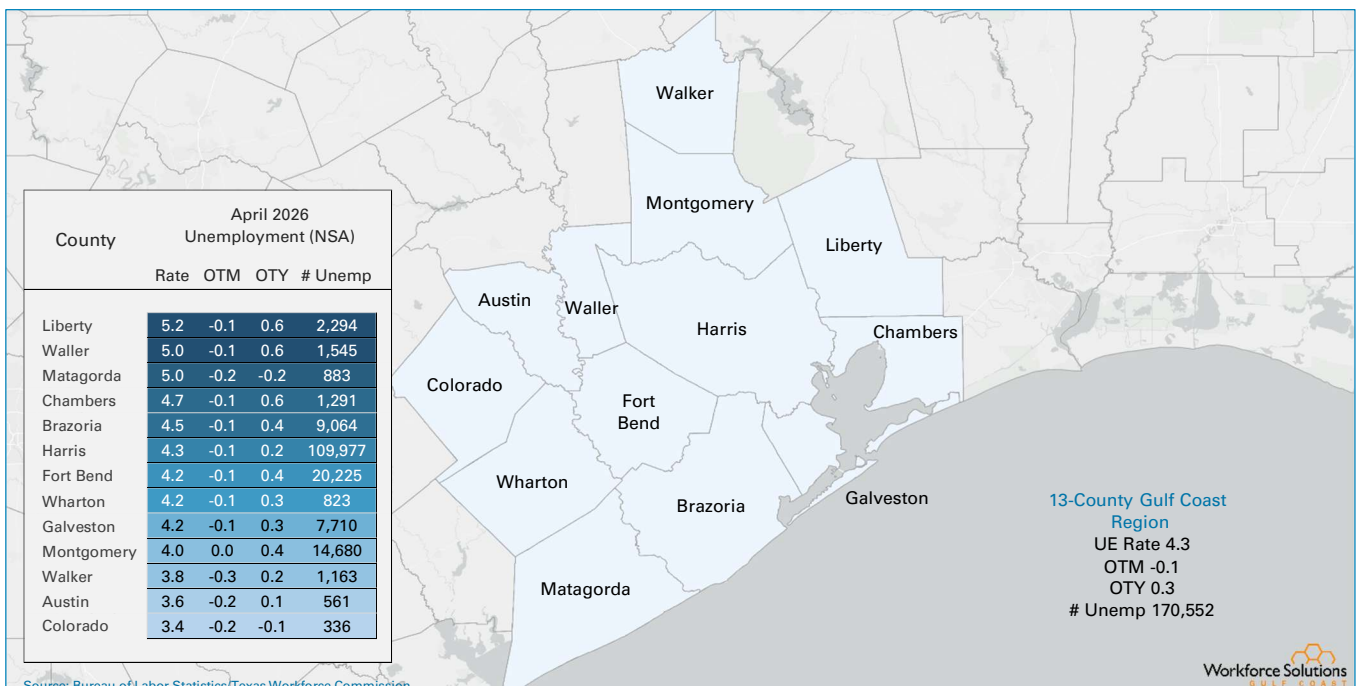


#### County-level Unemployment

Among the 13 counties that comprise the Gulf Coast Workforce Development Area, unemployment rates in April ranged from a high of 5.2 percent in Liberty County to a low of 3.4 percent in Colorado. Over the month, 12 counties saw their unemployment rates decline in keeping with the region-wide decrease of -0.1 percentage points while one saw no change. Walker saw the largest percentage-point decrease in unemployment down -0.3 pp. representing -74 fewer unemployed workers compared to the previous month. This was followed by Austin (-0.2 pp, -29 workers) and Colorado

(-0.2 pp, -13 workers). Over the year unemployment rates rose with, Chambers posting the largest increase, up 0.6 percentage points representing 162 more unemployed workers compared to a year ago followed by Liberty (0.6 pp, 255 workers) and Waller (0.6 pp, 170 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 -278,213 as of this April (see Map 1 legend).

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



## Local Area Unemployment Statistics (continued)

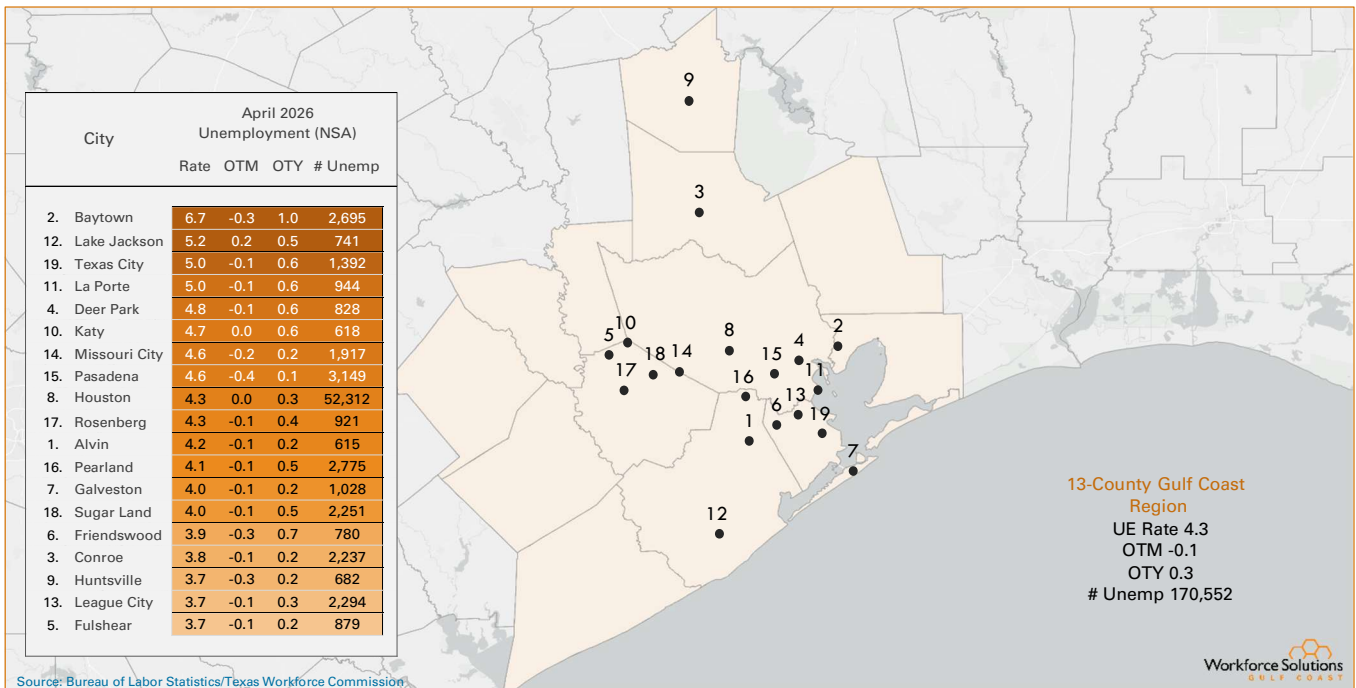
### Not-Seasonally Adjusted

#### 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 April ranged from a high of 6.7 percent in Baytown to a low of 3.7 percent in Fulshear (see Map 2 legend). Over the month, 16 cities saw their unemployment rates decline in keeping with the region-wide decrease of -0.1 percentage points while two saw no changes and one increased. Pasadena saw the largest

percentage-point decrease in unemployment down -0.4 pp. representing -261 fewer unemployed workers compared to the previous month. This was followed by Baytown (-0.3 pp, -138 workers) and Friendswood (-0.3 pp, -59 workers). Over the year unemployment rates rose with, Baytown posting the largest increase, up 1.0 percentage points representing 381 more unemployed workers compared to a year ago followed by Friendswood (0.7 pp, 141 workers) and Texas City (0.6 pp, 164 workers). The 19 cities below accounted for 46 percent of the 170,552 unemployed workers across the Gulf Coast Region as of this April (see Map 2 legend).

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



### Seasonally Adjusted

#### Houston Metro, Texas, and U.S. Unemployment

The Houston MSA (seasonally-adjusted) unemployment rate stood at 4.6 percent in March, unchanged from February's 4.6 percent and up from 4.3 percent a year ago. This was above the statewide rate of 4.3 percent and above the national rate of 4.3 percent. 178,271 individuals were unemployed in Houston in March, down slightly from February's 179,346 and up from 167,017 in March 2025 (see Charts 41 and 42). NOTE: Seasonally-adjusted data for the MSA are available with a one-month delay but are not available for the 13-County Region or 19 cities.

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

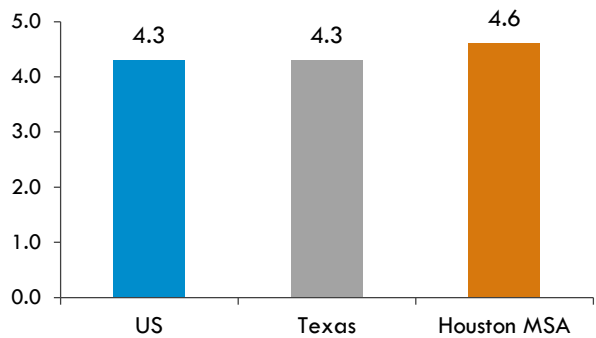
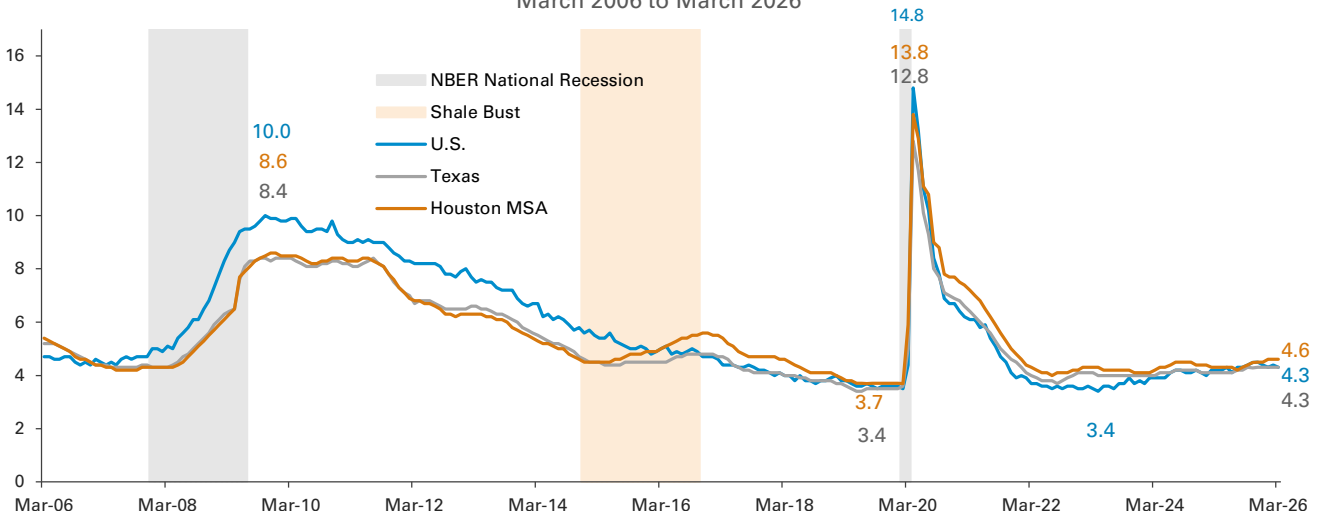


Chart 42. Unemployment Rates U.S., Texas, and Houston MSA (SA)  
 March 2006 to March 2026



## Houston MSA Workforce Solutions Index (WSI)

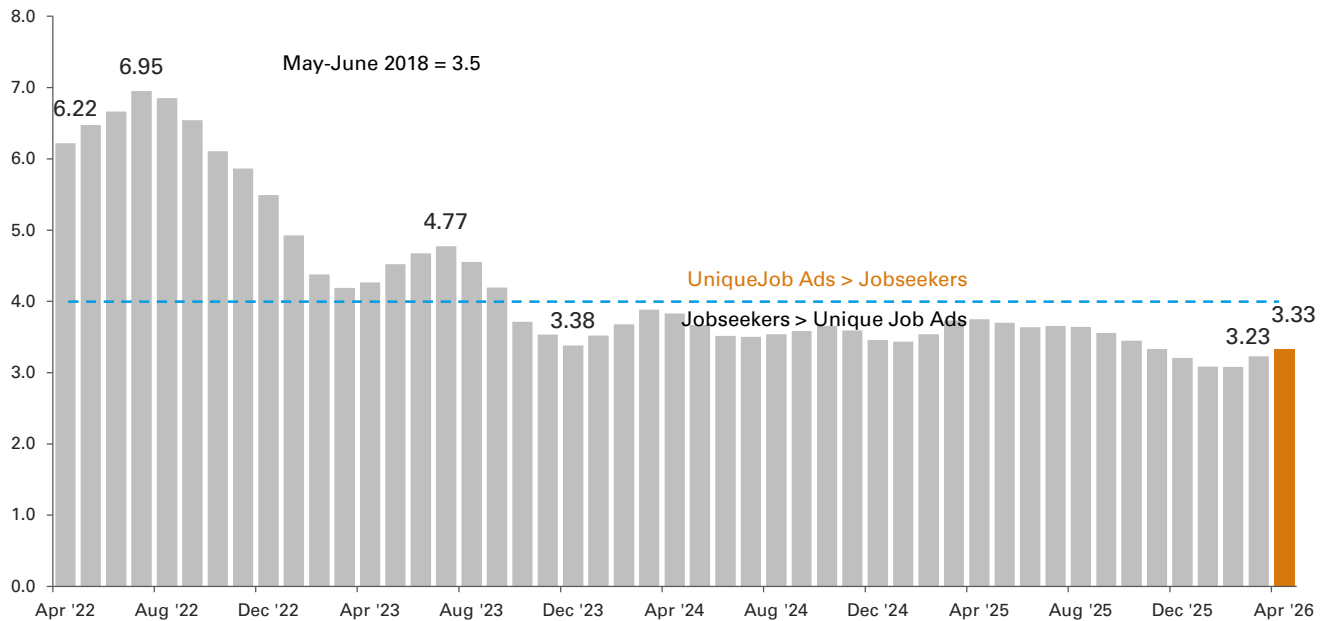


### The Houston MSA Workforce Solutions Index (WSI)

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**  
**April**  
**2026:**  
**3.33**

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 April 2026

The Houston MSA WSI for April stood at 3.33, up from March's 3.23. This was the result of a slight decrease in the number of active job ads between March and April by approximately -300 coupled with a comparatively larger -1,000 decrease in the number of unemployed individuals between February and March. This April marks three consecutive months of increases in the WSI from a recent low of 3.08 in February. In addition, February'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 April the index has remained below the equilibrium value of 4.0. for 31 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.



# Houston Area Employment Situation

April 2026

Table 1. Houston MSA Sectors and Major Industry Subcomponents

NAICS Industry	Apr-26	Mar-26	Apr-25	Monthly	Monthly	Yearly	Yearly %
<b>Total Nonfarm</b>	<b>3,490,000</b>	<b>3,485,000</b>	<b>3,482,300</b>	<b>5,000</b>	<b>0.1%</b>	<b>7,700</b>	<b>0.2%</b>
Total Private	3,018,500	3,012,500	3,010,600	6,000	0.2%	7,900	0.3%
Goods Producing	572,900	572,300	572,400	600	0.1%	500	0.1%
<b>.Mining and Logging</b>	<b>71,300</b>	<b>71,200</b>	<b>76,700</b>	<b>100</b>	<b>0.1%</b>	<b>-5,400</b>	<b>-7.0%</b>
...Oil and Gas Extraction	34,500	34,600	37,100	-100	-0.3%	-2,600	-7.0%
...Support Activities for Mining	35,600	35,500	38,300	100	0.3%	-2,700	-7.0%
<b>.Construction</b>	<b>262,800</b>	<b>261,600</b>	<b>253,900</b>	<b>1,200</b>	<b>0.5%</b>	<b>8,900</b>	<b>3.5%</b>
..Construction of Buildings	67,200	66,700	65,600	500	0.7%	1,600	2.4%
..Heavy and Civil Engineering Construction	67,000	67,300	64,200	-300	-0.4%	2,800	4.4%
..Specialty Trade Contractors	128,600	127,600	124,100	1,000	0.8%	4,500	3.6%
<b>.Manufacturing</b>	<b>238,800</b>	<b>239,500</b>	<b>241,800</b>	<b>-700</b>	<b>-0.3%</b>	<b>-3,000</b>	<b>-1.2%</b>
..Durable Goods	151,700	151,100	151,000	600	0.4%	700	0.5%
...Fabricated Metal Product Manufacturing	55,000	54,900	54,900	100	0.2%	100	0.2%
...Machinery Manufacturing	39,700	39,500	39,800	200	0.5%	-100	-0.3%
....Agriculture, Construction, and Mining Machinery Mfg.	18,800	18,800	19,000	0	0.0%	-200	-1.1%
...Computer and Electronic Product Manufacturing	15,300	15,300	15,100	0	0.0%	200	1.3%
..Non-Durable Goods	87,100	88,400	90,800	-1,300	-1.5%	-3,700	-4.1%
...Petroleum and Coal Products Manufacturing	7,400	7,500	8,100	-100	-1.3%	-700	-8.6%
...Chemical Manufacturing	42,900	43,200	43,700	-300	-0.7%	-800	-1.8%
Service Providing	2,917,100	2,912,700	2,909,900	4,400	0.2%	7,200	0.2%
.Private Service Providing	2,445,600	2,440,200	2,438,200	5,400	0.2%	7,400	0.3%
<b>..Trade, Transportation, and Utilities</b>	<b>694,500</b>	<b>693,800</b>	<b>695,700</b>	<b>700</b>	<b>0.1%</b>	<b>-1,200</b>	<b>-0.2%</b>
...Wholesale Trade	176,900	177,400	179,200	-500	-0.3%	-2,300	-1.3%
....Merchant Wholesalers, Durable Goods	109,800	110,300	111,200	-500	-0.5%	-1,400	-1.3%
.....Prof. and Commercial Equip. Supplies Wholesalers	17,900	18,000	18,300	-100	-0.6%	-400	-2.2%
....Merchant Wholesalers, Nondurable Goods	55,300	55,400	56,300	-100	-0.2%	-1,000	-1.8%
...Retail Trade	318,500	316,600	318,500	1,900	0.6%	0	0.0%
....Motor Vehicle and Parts Dealers	44,800	44,600	45,200	200	0.4%	-400	-0.9%
....Bldg. Material and Garden Equip. and Supplies Dealers	24,500	24,000	25,000	500	2.1%	-500	-2.0%
....Food and Beverage Stores	77,800	77,700	77,400	100	0.1%	400	0.5%
....Health and Personal Care Stores	61,000	60,700	61,900	300	0.5%	-900	-1.5%
....Clothing and Clothing Accessories Stores	16,100	16,200	16,200	-100	-0.6%	-100	-0.6%
....General Merchandise Stores	44,900	44,500	45,700	400	0.9%	-800	-1.8%
.....Department Stores	22,500	22,600	22,400	-100	-0.4%	100	0.4%
.....Other General Merchandise Stores	24,200	24,300	24,500	-100	-0.4%	-300	-1.2%
...Transportation, Warehousing, and Utilities	199,100	199,800	198,000	-700	-0.4%	1,100	0.6%
....Utilities	25,100	25,100	23,900	0	0.0%	1,200	5.0%
.....Air Transportation	21,900	21,700	21,600	200	0.9%	300	1.4%
.....Truck Transportation	30,700	30,800	30,400	-100	-0.3%	300	1.0%
.....Pipeline Transportation	15,800	15,800	15,100	0	0.0%	700	4.6%
<b>.Information</b>	<b>27,300</b>	<b>27,600</b>	<b>28,400</b>	<b>-300</b>	<b>-1.1%</b>	<b>-1,100</b>	<b>-3.9%</b>
...Telecommunications	9,900	9,800	10,100	100	1.0%	-200	-2.0%
<b>..Financial Activities</b>	<b>175,500</b>	<b>176,500</b>	<b>179,000</b>	<b>-1,000</b>	<b>-0.6%</b>	<b>-3,500</b>	<b>-2.0%</b>
...Finance and Insurance	113,400	113,900	115,900	-500	-0.4%	-2,500	-2.2%
....Credit Intermediation and Related Activities	44,500	44,600	46,000	-100	-0.2%	-1,500	-3.3%
.....Depository Credit Intermediation	29,600	29,700	30,600	-100	-0.3%	-1,000	-3.3%
.....Securities, Commodity Contracts, and Fin. Investments	20,300	20,400	20,600	-100	-0.5%	-300	-1.5%
....Insurance Carriers and Related Activities	48,600	48,900	49,300	-300	-0.6%	-700	-1.4%
...Real Estate and Rental and Leasing	62,100	62,600	63,100	-500	-0.8%	-1,000	-1.6%
<b>..Professional and Business Services</b>	<b>572,700</b>	<b>566,900</b>	<b>563,800</b>	<b>5,800</b>	<b>1.0%</b>	<b>8,900</b>	<b>1.6%</b>
...Professional, Scientific, and Technical Services	285,700	282,200	284,000	3,500	1.2%	1,700	0.6%
....Legal Services	34,700	34,300	34,000	400	1.2%	700	2.1%
....Accounting, Tax Preparation, Bookkeeping, and Payroll	27,800	27,800	29,200	0	0.0%	-1,400	-4.8%
....Architectural, Engineering, and Related Services	79,200	78,200	78,400	1,000	1.3%	800	1.0%
....Computer Systems Design and Related Services	41,700	41,200	43,000	500	1.2%	-1,300	-3.0%
...Management of Companies and Enterprises	42,900	42,700	43,400	200	0.5%	-500	-1.2%
...Admin. and Support and Waste Mgmt. and Remediation	244,100	242,000	236,400	2,100	0.9%	7,700	3.3%
....Administrative and Support Services	229,500	227,200	222,900	2,300	1.0%	6,600	3.0%
.....Employment Services	80,600	80,500	78,800	100	0.1%	1,800	2.3%
.....Services to Buildings and Dwellings	61,200	60,100	57,500	1,100	1.8%	3,700	6.4%
<b>..Educational and Health Services</b>	<b>474,200</b>	<b>474,200</b>	<b>467,600</b>	<b>0</b>	<b>0.0%</b>	<b>6,600</b>	<b>1.4%</b>
...Educational Services	73,100	73,400	73,800	-300	-0.4%	-700	-0.9%
...Health Care and Social Assistance	401,100	400,800	393,800	300	0.1%	7,300	1.9%
....Ambulatory Health Care Services	202,000	202,200	199,500	-200	-0.1%	2,500	1.3%
....Hospitals	102,100	102,300	99,400	-200	-0.2%	2,700	2.7%
<b>..Leisure and Hospitality</b>	<b>370,600</b>	<b>369,900</b>	<b>370,400</b>	<b>700</b>	<b>0.2%</b>	<b>200</b>	<b>0.1%</b>
...Arts, Entertainment, and Recreation	43,300	42,600	42,500	700	1.6%	800	1.9%
...Accommodation and Food Services	327,300	327,300	327,900	0	0.0%	-600	-0.2%
....Accommodation	27,100	27,000	27,900	100	0.4%	-800	-2.9%
....Food Services and Drinking Places	300,200	300,300	300,000	-100	0.0%	200	0.1%
<b>..Other Services</b>	<b>130,800</b>	<b>131,300</b>	<b>133,300</b>	<b>-500</b>	<b>-0.4%</b>	<b>-2,500</b>	<b>-1.9%</b>
<b>Government</b>	<b>471,500</b>	<b>472,500</b>	<b>471,700</b>	<b>-1,000</b>	<b>-0.2%</b>	<b>-200</b>	<b>0.0%</b>
.Federal Government	35,300	35,100	37,700	200	0.6%	-2,400	-6.4%
.State Government	104,300	104,600	101,500	-300	-0.3%	2,800	2.8%
..State Government Educational Services	56,800	57,200	55,200	-400	-0.7%	1,600	2.9%
.Local Government	331,900	332,800	332,500	-900	-0.3%	-600	-0.2%
..Local Government Educational Services	228,700	229,200	228,800	-500	-0.2%	-100	0.0%