

TEXAS LABOR MARKET REVIEW

OCTOBER 2025

The Texas Labor Market Review brings you the most current labor market highlights and happenings across the Lone Star State. The information that follows is produced and published on a monthly basis and includes data on nonagricultural job trends, the labor force, job postings, and other relevant indicators for both the state and sub-state areas. Additional data and historical information is available at TexasLMI.com.

September 2025 Monthly Indicators

INDUSTRY EMPLOYMENT



4,600 jobs

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JOB ADS INDEX



0.1%

Page 8

UNEMPLOYMENT RATE



0.0 points

Page 5

INITIAL UI CLAIMS



7,312 claims

Page 13

CURRENT EMPLOYMENT STATISTICS

Statewide Industry Employment (Seasonally Adjusted)

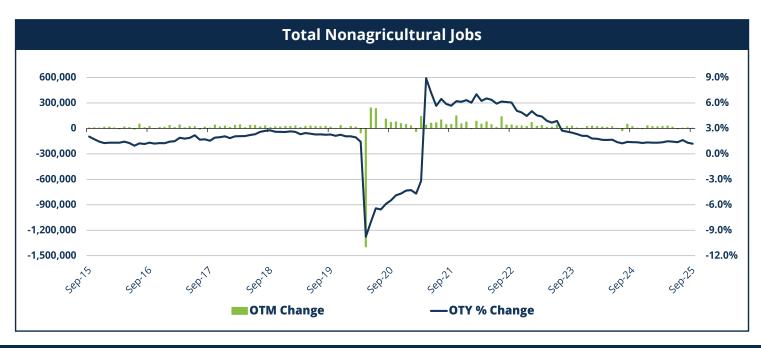
Total Nonfarm employment expanded in September for the third month in a row with a gain of 4,600 jobs. This marked a new record-high level for the 11th time in the last 14 months, while the annual growth rate dipped by 0.1 point to a level of 1.2 percent. Monthly growth was led by the Government sector, which posted an increase of

5,900 jobs in September and notched a second consecutive record-high employment level. Six of the 11 major industries added jobs over the month, and eight grew over the year. Four of the 10 private industries achieved new series highs in September.

Industry	Sep 2025	Monthly Change	Annual Change	Annual % Change
Total Nonagricultural	14,343,800	4,600	168,000	1.2
Total Private	12,185,200	-1,300	130,700	1.1
Goods Producing	2,070,700	2,900	11,100	0.5
Mining and Logging	221,500	-400	2,600	1.2
Construction	881,100	4,300	16,400	1.9
Manufacturing	968,100	-1,000	-7,900	-0.8
Service Providing	12,273,100	1,700	156,900	1.3
Trade, Transportation, and Utilities	2,818,100	2,000	42,400	1.5
Information	225,100	-600	-1,200	-0.5
Financial Activities	939,800	200	13,300	1.4
Professional and Business Services	2,117,700	-6,400	-11,300	-0.5
Private Education & Health Services	1,981,400	-1,100	39,900	2.1
Leisure and Hospitality	1,538,400	200	33,700	2.2
Other Services	494,000	1,500	2,800	0.6
Government	2,158,600	5,900	37,300	1.8

Highlights

- Leisure and Hospitality employment reached a new series high level for the sixth straight month as the industry added 200 jobs in September.
- Employment in Trade, Transportation, and Utilities set a ninth consecutive series high job count in September with 2,000 jobs added over the month.
- After a revised increase of 200 positions in August, Construction employment added 4,300 positions in September.



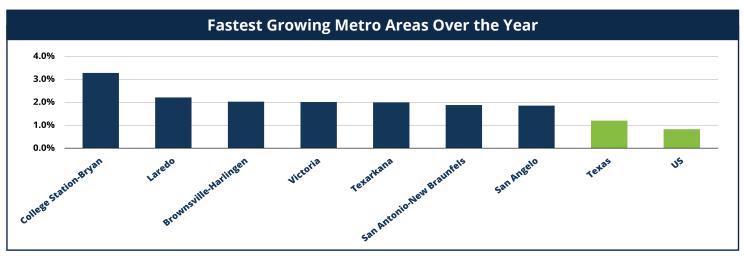
CURRENT EMPLOYMENT STATISTICS

Metro Areas (Seasonally Adjusted)

Metro Areas	Sep 2025	Monthly Change	Annual Change	Annual % Change
Abilene MSA	79,200	-200	600	0.8
Amarillo MSA	131,700	200	1,800	1.4
Austin-Round Rock MSA	1,374,200	-2,100	6,300	0.5
Beaumont-Port Arthur MSA	170,400	100	1,200	0.7
Brownsville-Harlingen MSA	166,300	-700	3,300	2.0
College Station-Bryan MSA	148,200	200	4,700	3.3
Corpus Christi MSA	201,200	100	1,300	0.7
Dallas-FW-Arlington MSA	4,303,900	-2,100	30,500	0.7
Dallas-Plano-Irving MD	3,089,600	800	16,400	0.5
FW-Arlington-Grapevine MD	1,211,500	-300	13,100	1.1
Eagle Pass MSA	19,000	0	0	0.0
El Paso MSA	357,600	0	3,300	0.9
Houston MSA	3,467,700	3,600	22,900	0.7
Killeen-Temple MSA	156,500	300	1,500	1.0
Laredo MSA	115,500	-200	2,500	2.2
Longview MSA	122,500	-200	800	0.7
Lubbock MSA	175,200	-100	1,200	0.7
McAllen MSA	306,100	-400	3,600	1.2
Midland MSA	127,300	0	1,900	1.5
Odessa MSA	84,200	100	900	1.1
San Angelo MSA	54,900	0	1,000	1.9
San Antonio MSA	1,209,900	-700	22,300	1.9
Sherman-Denison MSA	54,700	200	700	1.3
Texarkana MSA	61,500	-100	1,200	2.0
Tyler MSA	119,400	-400	1,300	1.1
Victoria MSA	40,600	100	800	2.0
Waco MSA	144,000	-300	1,500	1.1
Wichita Falls MSA	59,700	100	0	0.0

Highlights

- Total nonfarm employment in 11 of 27 metro areas expanded in September for a combined monthly increase of 5,800 jobs. Four MSAs experienced no change over the month, and 12 areas recorded monthly employment declines. As of September, 25 areas experienced positive year-over-year job gains and two areas (the Eagle Pass and Wichita Falls MSAs) were unchanged. Five MSAs recorded annual growth rates at or above 2.0 percent.
- Employment in the Houston-Pasadena-The Woodlands MSA expanded for the second straight month with the addition of 3,600 jobs in September to lead all metro areas.
- The Dallas-Plano-Irving metro division built on a revised increase of 3,100 jobs in August with a gain of 800 in September.
- The College Station-Bryan MSA showed employment growth for the second straight month with the addition of 200 jobs in September.



CURRENT EMPLOYMENT STATISTICS

Fastest Growing Metro Areas Over-the-Year (Not Seasonally Adjusted)

College Station-Bryan MSA					
Area Industry Composition		Industry	Annual Change	Annual % Change	
		Total Nonagricultural	3,500	2.4	
	5.4% ■	Mining, Logging & Construction	0	0.0	
	4.1%	Manufacturing	-100	-1.6	
13.2% ■		Trade, Transportation & Utilities	500	2.6	
	1.0%	Information	0	0.0	
	3.3%	Financial Activities	0	0.0	
	9.8%	Professional & Business Services	0	0.0	
	11.1%	Private Education & Health Services	600	3.8	
	14.7%	Leisure & Hospitality	600	2.9	
	2.8%	Other Services	0	0.0	
	34.7%	Government	1,900	3.9	

Brownsville-Harlingen MSA				
Area Industry Composition		Industry	Annual Change	Annual % Change
		Total Nonagricultural	3,500	2.2
	2.5%	Mining, Logging & Construction	100	2.4
4.2%		Manufacturing	-100	-1.4
	16.1%	Trade, Transportation & Utilities	500	1.9
	0.9%	Information	0	0.0
	3.5%	Financial Activities	100	1.8
	10.6%	Professional & Business Services	300	1.7
	31.1%	Private Education & Health Services	1,300	2.6
	11.4%	Leisure & Hospitality	400	2.2
	2.2%	Other Services	-100	-2.7
	17.6%	Government	1,000	3.5

Laredo MSA					
Area Industry Composition		Industry	Annual Change	Annual % Change	
		Total Nonagricultural	2,300	2.0	
	2.7%	Mining, Logging & Construction	-100	-3.1	
	0.9%	Manufacturing	0	0.0	
	32.0% ■	Trade, Transportation & Utilities	900	2.5	
	0.6%	Information	0	0.0	
	3.2%	Financial Activities	0	0.0	
	8.3%	Professional & Business Services	0	0.0	
	17.1%	Private Education & Health Services	900	4.8	
	10.9%	Leisure & Hospitality	500	4.1	
	2.3%	Other Services	0	0.0	
	21.9%	Government	100	0.4	

Download CES data (including industry-level data) in Excel

LOCAL AREA UNEMPLOYMENT STATISTICS

Texas & the U.S. (Seasonally Adjusted)

Texas September 2025

- **Employed** 15,222,900
- Unemployed 656,100



Date	CLF	Employment	Unemployment	Rate
September 2025	15,879,000	15,222,900	656,100	4.1
August 2025	15,857,300	15,213,600	643,800	4.1
September 2024	15,715,000	15,057,700	657,200	4.2

U.S. September 2025

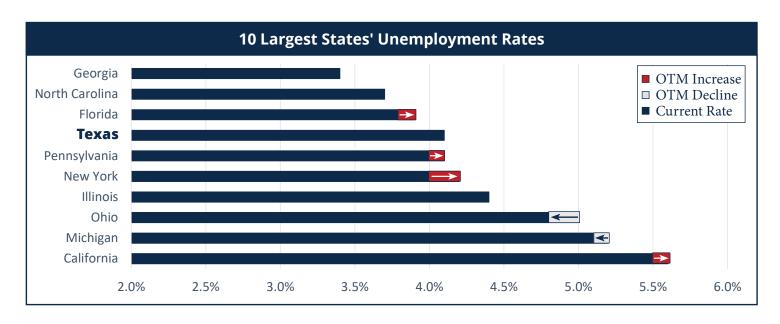
- **Employed** 163,645,000
- **Unemployed** 7,603,000



Date	CLF	Employment	Unemployment	Rate
September 2025	171,248,000	163,645,000	7,603,000	4.4
August 2025	170,778,000	163,394,000	7,384,000	4.3
September 2024	168,703,000	161,802,000	6,901,000	4.1

Highlights

- Over the month the Texas seasonally adjusted unemployment rate remained at 4.1 percent, three-tenths of a percentage point lower than the U.S. rate of 4.4 percent.
- The state's seasonally adjusted labor force participation rate was 64.7 percent in September.
- Texas' seasonally adjusted LAUS employment was up 9,300 from last month.
- Summarizing the not seasonally adjusted estimates, the Texas unemployment rate decreased to 4.4 percent in September. This was 0.3 percentage points higher than the unemployment rate in September 2024.

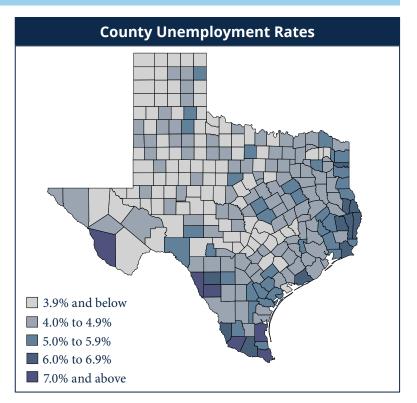


LOCAL AREA UNEMPLOYMENT STATISTICS

Substate Areas (Not Seasonally Adjusted)

County Highlights

- Unemployment rates varied considerably across counties, ranging from a low of 0.5 percent in Loving County to a high of 10.2 percent in Starr County.
- Fifteen counties had an unemployment rate of 3.0 percent or less.
- Frio County experienced the largest unemployment rate decrease of 2.3 percentage points over the year.
- In September 2025, seven counties experienced an increase in their unemployment rates over the month, while 239 counties experienced a decrease and eight experienced no change.
- Over the year, the civilian labor force increased in 234 counties, while 19 counties in the state experienced a decline and one, Loving County, experienced no change.



Texas Metro Areas Ranked by Unemployment Rate

Rank	Area	Rate	Rank	Area	Rate
1	Amarillo	3.3		United States	4.3
1	Midland	3.3		Texas	4.4
3	San Angelo	3.4	15	Texarkana	4.5
4	Abilene	3.7	15	Victoria	4.5
4	College Station-Bryan	3.7	17	Corpus Christi	4.7
4	Lubbock	3.7	17	Laredo	4.7
7	Austin-Round Rock-San Marcos	3.8	19	El Paso	4.8
8	Wichita Falls	4.0	19	Houston-Pasadena-The Woodlands	4.8
9	Odessa	4.1	19	Longview	4.8
9	Sherman-Denison	4.1	22	Killeen-Temple	5.0
9	Tyler	4.1	23	Beaumont-Port Arthur	5.6
12	Dallas-Fort Worth-Arlington	4.2	24	McAllen-Edinburg-Mission	6.5
12	San Antonio-New Braunfels	4.2	25	Brownsville-Harlingen	7.3
12	Waco	4.2	26	Eagle Pass	8.9

Metro Area Highlights

- Over the month, 25 metropolitan areas experienced a decrease in their unemployment rates while one, Eagle Pass MSA, experienced no change.
- Over the year, 25 Texas metropolitan areas saw an increase in their unemployment rates, while one, Longview MSA, experienced no change.

Download LAUS data in Excel

CURRENT POPULATION SURVEY

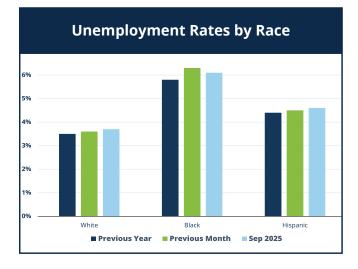
12-Month Moving Average State Unemployment Rates

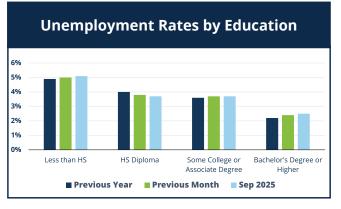
Unemployment Rates by Demographic

Sex (age 16+)	Sep 2025	Aug 2025	Sep 2024
Female	4.3%	4.3%	3.9%
Male	4.0%	3.9%	4.0%
Age (16+)	Sep 2025	Aug 2025	Sep 2024
Age 16-19	12.9%	13.2%	12.6%
Age 20-24	8.0%	7.7%	6.7%
Age 25-34	4.1%	4.1%	4.3%
Age 35-44	3.3%	3.3%	3.0%
Age 45-54	2.9%	2.8%	2.5%
Age 55-64	2.9%	3.0%	3.0%
Age 65+	2.7%	2.6%	3.4%
Race (age 16+)	Sep 2025	Aug 2025	Sep 2024
White	3.7%	3.6%	3.5%
Black	6.1%	6.3%	5.8%
Hispanic	4.6%	4.5%	4.4%
Education (age 25+)	Sep 2025	Aug 2025	Sep 2024
Less than High School	5.1%	5.0%	4.9%
High School Diploma	3.7%	3.8%	4.0%
Some College/Associate Degree	3.7%	3.7%	3.6%
Bachelor's Degree or Higher	2.5%	2.4%	2.2%
Other Categories (age 18+)	Sep 2025	Aug 2025	Sep 2024
Veterans	2.7%	2.5%	1.6%

Highlights

- The unemployment rate for males remained at 4.0 percent over the year, while the rate for women increased by 0.4 percentage points to 4.3 percent.
- The veteran unemployment rate increased over the month by 0.2 percentage points to 2.7 percent in September.
- Individuals with some college education or associate degree had an unemployment rate of 3.7 percent. Those with a bachelor's degree and higher had an unemployment rate of 2.5 percent and those with a high school diploma had a rate of 3.7 percent.
- Of the new entrants into Texas' labor force in September, less were men (34,500) than women (45,200).

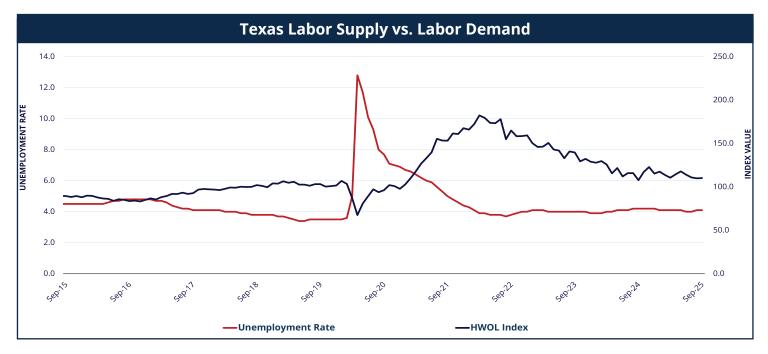




View notes on CPS data

HELP WANTED ONLINE

Statewide Online Job Ads Data (Seasonally Adjusted)



Highlights

- The Conference Board–Lightcast Help Wanted OnLine® (HWOL) Index increased over the month to 110.1 in September, an increase of 0.1 points.
- The September Supply/Demand rate was 1.2 unemployed for each advertised vacancy, with a total of 92,468 more unemployed workers than advertised vacancies.

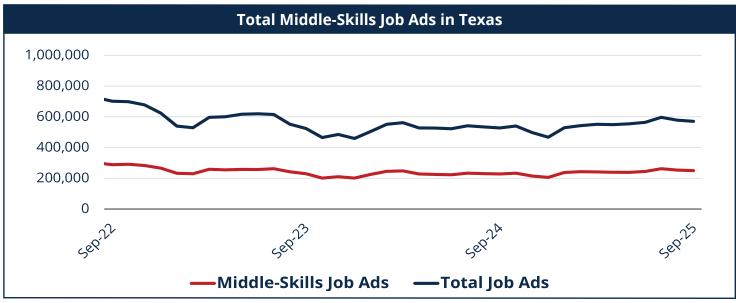
Top Employers by Postings

Employer	Sep 2025
HCA Healthcare	5,650
Walmart	5,057
CHRISTUS Health	4,595
Domino's Pizza	3,929
Baylor Scott & White Health	3,667
State Of Texas	2,367
JPMorgan Chase	2,031
AutoZone	1,951
Houston Methodist	1,887
Compass Group	1,733

Top Occupations by Postings

Occupation	Sep 2025
Registered Nurses	31,024
Retail Salespersons	18,287
Heavy and Tractor-Trailer Truck Drivers	11,776
Customer Service Representatives	11,442
First-Line Supervisors of Retail Sales Workers	11,046
Software Developers	9,179
Sales Reps, Wholesale and Manufacturing, Except Technical and Scientific Products	8,662
Maintenance and Repair Workers, General	8,119
Home Health and Personal Care Aides	7,480
Food Service Managers	7,079

DEMAND FOR MIDDLE-SKILLS JOBS



Source: Lightcast® and TWC Long Term Projections 2022-2032

Highlights

- Middle-Skill occupations require more education than a high school diploma but less than a four-year degree.
- September Help Wanted OnLine® Middle-Skills Job Ads increased 9.6 percent over the year to 250,400.
- Job ads for Middle-Skill occupations represented 43.9 percent of all live postings in September.

Top Middle-Skills Employers by Postings

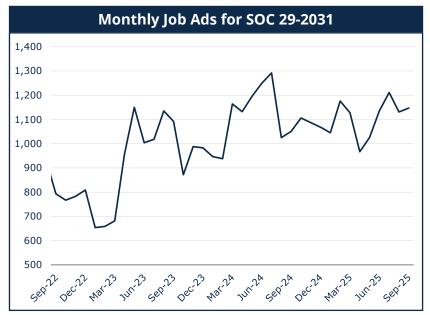
Employer	Sep 2025
HCA Healthcare	4,241
CHRISTUS Health	3,128
Domino's Pizza	3,118
Baylor Scott & White Health	2,389
Walmart	2,101
Houston Methodist	1,223
Texas Health Resources	1,208
Medical City Healthcare	1,051
State Of Texas	1,024
Methodist Health System	1,014

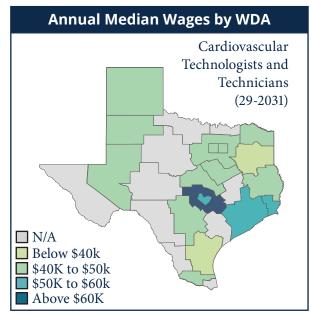
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Maintenance and Repair Workers, General	8,118
Home Health and Personal Care Aides	7,481
Food Service Managers	7,078
Sales Reps of Services, Except Advertising, Insurance, Financial Services, and Travel	5,665
Health Technologists and Technicians, All Other	5,440
Secretaries and Administrative Assistants, Except Legal, Medical, and Executive	5,019

OCCUPATIONAL PROFILE

Standard Occupational Classification: Cardiovascular Technologists and Technicians (29-2031)

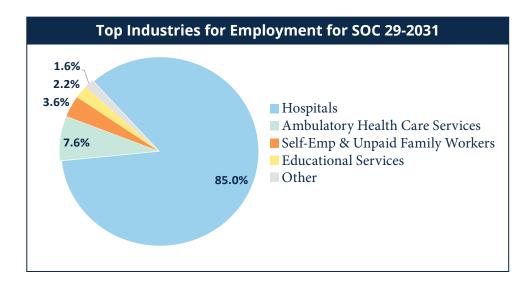




Job Description

- Perform and interpret cardiovascular tests: Conduct EKGs, echocardiograms, stress tests, and other diagnostic
 procedures.
- Monitor and assess patient condition: Track vital signs, comfort, and safety during testing, alerting physicians to abnormalities.
- Record and analyze data: Observe and record test results, calculate measurements, and generate reports for physicians.

Education, Experience & Training for SOC 29-2031 Typical education needed for entry: Work experience in a related occupation: None Typical training needed: None



Occupational Outlook

- The 2024 median annual wage for this occupation in Texas is \$47,968, ranging from \$36,090 to \$60,705 among WDAs.
- In 2024, Gulf Coast WDA had the highest employment for this occupation at 1,240 and Rural Capital WDA had the highest median wage of \$60,705.
- 2022-2032 Occupational Projections estimate this occupation will grow 14.2 percent in Texas, with high growth expected in Rural Capital WDA at 33.3 percent.
- Learn more: <u>TexasLMI.com.</u>

UNDERSTANDING THE ECONOMY

Data in Context

The Texas Workforce Report

by Nancy Moore and Mark Lavergne

The Department of Labor's Employment and Training Administration (ETA) supports the Texas Workforce Commission (TWC) in a cooperative effort to provide labor market data that helps job seekers, employers, educators, and workforce intermediaries make informed decisions for themselves and the workforce in their communities. Economic development regions in Texas use this data to direct resources for growth. Several key questions drive this research: What is the employment growth among local industries? Is the region's population growing? Are there enough skilled workers to fill jobs?

TWC provides ETA with a statewide report of knowledge acquired through program data and research in the annual <u>Texas Workforce Report</u>. Below are some of the findings in this year's 2024-2025 report.

"The Texas labor market has continued to trend positively over the past few years as the state's population has continued to swell."

Population Growth Texas continued to attract people in 2024 as the population increased by more than 562,000 persons, the largest growth seen in any state. The population of Texas now exceeds 31.1 million people. In fact, between 2023 and 2024, the Texas population grew at a faster rate than the national population, increasing by 1.8 percent as compared to 1.0 percent, respectively. Much of that population growth occurred in Texas metropolitan areas. All six of Texas' largest metropolitan statistical areas experienced growth over the year. Nationally, Houston-Pasadena-The Woodlands MSA ranked second, and Dallas-Fort Worth-Arlington MSA ranked third.

Civilian Workers The number of employed Texans reached a record level of over 15.2 million persons in June 2025. Twelve-month averages show labor force participation rates increased over the year for those with less than a high school diploma, high school graduates with no college, and some college or associate's degree. Bachelor's degree and higher was the only educational attainment group to decrease over the year by four-tenths of a percentage point at 74.9 percent, but also the group with the highest participation rate.

Total Nonfarm Employment For the year ending June 2025, seasonally adjusted total nonfarm employment in Texas posted a 1.4 percent annual growth rate to reach a level of 14,325,100 jobs.

Texas Total Nonfarm employment expanded by 20.7 percent from June 2015 to June 2025, with 2,460,500 jobs gained. Texas grew in both Goods-Producing (12.8%) and Service-Providing (22.2%) employment over the ten-year period, faster than the U.S. in both sectors.

"As the Texas Economy grows, so does the demand for a highly skilled workforce."

Industry Projections Long-term projections estimate that Texas employment will increase by more than 2.1 million jobs from 2022 to 2032, representing a growth of 14.7 percent.

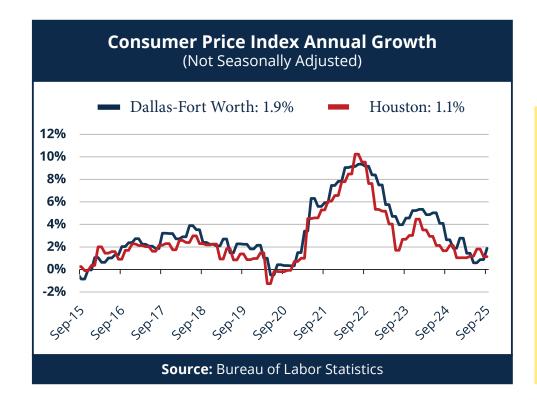
Occupation Projections Among occupations that paid above the statewide median salary in 2024, nursing occupations hold three of the top five rankings for projected employment by 2032 in the Health Care and Social Assistance sector.

In the Professional, Scientific, and Technical Services sector, Software Developers are projected to be the most indemand through 2032 with an estimated employment of 75,319 jobs, a 10-year increase of 65.0 percent.

The Transportation and Warehousing industry projects to add 28,195 Heavy and Tractor-Trailer Truck Drivers from 2022 to 2032

For a more detailed review, download the full Texas Workforce Report 2024-2025 at https://lmi.twc.texas.gov/shared/PDFs/Workforce Report.pdf.

KEY INDICATORS



The Consumer Price Index (CPI) is an index of the variation in prices paid by typical consumers for retail goods and other items.

Highlights

- Dallas-Fort Worth-Arlington CPI annual growth rate increased by 1.0 percentage points from the previous reading to 1.9 percent in September, 1.1 percentage point lower than the U.S. city average of 3.0 percent.
- Since September 2024, Food increased by 1.0 percent while Motor fuel increased by 0.3 percent.

Highlights

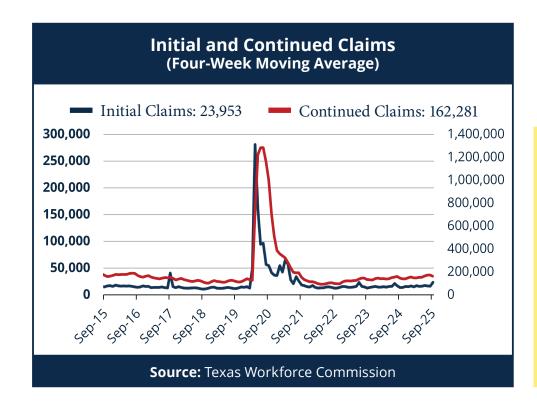
- AHE for Texas employees on private nonfarm payrolls increased by \$1.35 over the year to \$34.75, an increase of 4.0 percent.
- Over the year, Texas AHE increased by 1.8 percent in the Goods Producing Sector and increased by 4.8 percent in the Private Service Providing sector.
- U.S. AHE increased by \$1.14 over the year to \$36.60, an increase of 3.2 percent.

Average hours and earnings data are derived from reports of hours and payrolls for all employees.



Download Key Indicators data in Excel

KEY INDICATORS



Initial Claims refers to the number of requests for unemployment benefits; a person can file multiple claims. Continued Claims is the number of claimants receiving benefits.

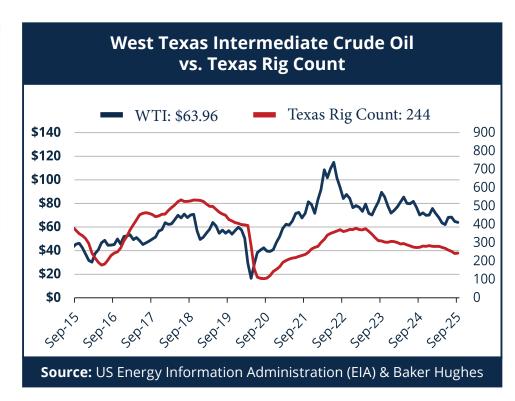
Highlights

- Over the month, the fourweek moving average increased by 7,312 claims to 23,953 for initial claims and decreased by 10,524 claims to 162,281 for continued claims.
- Over the year, the four-week moving average increased by 69.3 percent for initial claims and increased by 10.6 percent for continued claims.

Highlights

- The West Texas Intermediate Spot Price averaged \$63.96 in September, a \$0.90 decrease over the month, and an \$6.28 decrease over the year.
- Rig count in Texas increased by 2 rigs over the month and decreased by 31 rigs over the year, averaging 244 rigs in September.

West Texas Intermediate is a crude oil stream produced in Texas and southern Oklahoma that serves as reference for pricing a number of other streams. Rig Count refers to a weekly census of drilling rigs that are actively exploring for or developing oil or natural gas in the United States and Canada.



Download Key Indicators data in Excel

GLOSSARY

CURRENT EMPLOYMENT STATISTICS (CES)

- **Nonagricultural Jobs:** The total number of persons on establishment payrolls employed full or part time. Persons on the payroll of more than one establishment are counted in each. Data exclude proprietors, self-employed, unpaid family or volunteer workers, farm workers, and domestic workers. Government employment only covers civilian employees.
- Actual or Not Seasonally Adjusted: Describes data series not subject to the seasonal adjustment process. In other words, the effects of regular, or seasonal, patterns have not been removed from these series.
- **Seasonally Adjusted**: Effects of regular, or seasonal, patterns of hiring or layoffs (holidays, weather, etc.) have been removed from these series. These adjustments make it easier to observe the cyclical and other non-seasonal movements in a data series.

HELP WANTED ONLINE (HWOL)

- **Supply-Demand Rate:** Ratio measuring the number of unemployed persons per HWOL job openings.
- **Middle-Skills Jobs:** Jobs requiring more than a high school diploma but less than a four-year degree.

LOCAL AREA UNEMPLOYMENT STATISTICS

- **Employed:** All persons 16 years and over who, during the reference week, (a) did any work (at least one hour) as paid employees, worked on their own business, profession, or on their own farm, or worked 15 hours or more as unpaid family workers, or (b) were not working but who had jobs from which they were temporarily absent. Each employed person is counted only once, even if the person holds more than one job.
- **Unemployed:** All persons aged 16 years and over who had no employment, but were available for work and had made specific efforts to find employment. Includes persons who were waiting to be recalled to jobs from which they had been laid off.
- <u>Civilian Labor Force (CLF)</u>: All persons classified as employed or unemployed.
- **Unemployment Rate:** The unemployed number divided by the civilian labor force number.

OCCUPATIONAL EMPLOYMENT & WAGE STATISTICS (OEWS)

- Mean Wage: The average wage, calculated by summing the wages of all the employees in an occupation and dividing the sum by the number of employees.
- Percentile Wage: The wage below which a certain percentage of employees in an occupation earn. E.g., 25th Percentile Wage: 25 percent of employees in an occupation earn at or below this wage.
- **Median Wage:** A percentile wage boundary demarcating the 50th percentile; half of employees in an occupation earn more than the median wage, and half earn less than the median wage.
- Standard Occupational Classification: A hierarchical taxonomy that assigns a numeric code to an occupation according to tasks performed. This allows narrowly defined occupations to be grouped together at higher levels of aggregation reflecting common functions among similar occupations.

MISCELLANEOUS

- Metropolitan Statistical Area (MSA):
 Geographic area containing 1+ urban center with a population of 50,000+, plus adjacent territory with high social/economic integration with the urban center. In Texas, an MSA consists of 1+ counties.
- Metropolitan Division (MD): Smaller areas within a large MSA. The MSA must have a population of 2.5 million+ to be subdivided into Metropolitan Divisions (MDs).
- Metro Area (MA): Refers to either an MSA or MD. Texas has 26 MSAs, including the Dallas-Fort Worth-Arlington MSA, which is subdivided into two MDs.
- Workforce Development Area (WDA): The State of Texas is divided into 28 local workforce development areas.

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