INDEPENDENT MARKET INTELLIGENCE REPORT

Texas Industrial Manufacturing 2026

Market scale, industrial hubs, pricing pressure & competitive intelligence.

A data-driven market intelligence report focused on Texas machinery, equipment and industrial manufacturers. Prepared using U.S. Census Bureau, BLS, USTR and Federal Reserve Bank of Dallas datasets.

RESEARCH PERIOD
2025 – 2026

PRIMARY MARKETS
Houston & Dallas–Fort Worth

FOCUS SEGMENTS
Industrial Machinery · Energy Equipment · Pumps & Compressors · Fabricated Metal · Electrical Equipment

The Texas Manufacturing Market In Five Numbers

The headline measures of scale, employment and export value that define the Texas industrial manufacturing market.

ESTABLISHMENTS

20,781

Manufacturing establishments in Texas

U.S. Census Bureau, County Business Patterns (2022)

EMPLOYMENT

977,500

Manufacturing employees statewide

U.S. Census Bureau, County Business Patterns (2022)

EXPORT VALUE

$299.3B

Texas manufacturing exports

U.S. Trade Representative, 2025

METRO SCALE — HOUSTON + DFW

550,300

Combined manufacturing jobs across the two largest Texas industrial hubs

BLS Metro Area Employment · Houston 237,000 (Feb 2026) + Dallas–Fort Worth 313,300 (Jun 2026); reference months differ

COST PRESSURE INDEX

41.3 vs **25.6**

Prices paid versus prices received — a live margin-compression signal

Federal Reserve Bank of Dallas, Texas Manufacturing Outlook Survey, July 2026 · diffusion indexes, not percentages

WHAT THIS MEANS FOR MANUFACTURERS

DATA	INSIGHT	BUSINESS IMPACT
20,781 manufacturing establishments and **977,500** employees across Texas.	→ A large and highly diverse manufacturing base rather than a single concentrated market.	→ More fragmented competitor, product and pricing information to monitor across many channels.
Prices paid **41.3** against prices received **25.6**.	→ Input costs are rising faster than manufacturers are able to pass them through.	→ Pricing decisions need current visibility of what the market is actually charging.

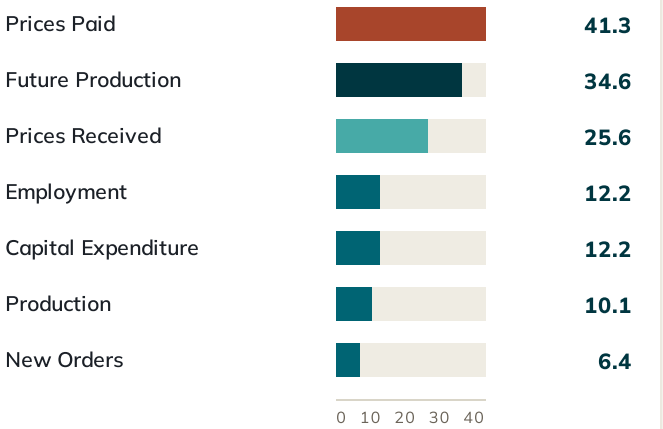
CONTENTS

Figures are drawn from different datasets and reporting periods and should not be read as a single-year series. Sources: U.S. Census Bureau; U.S. Trade Representative; U.S. Bureau of Labor Statistics; Federal Reserve Bank of Dallas.

A Large Market Under Changing Conditions

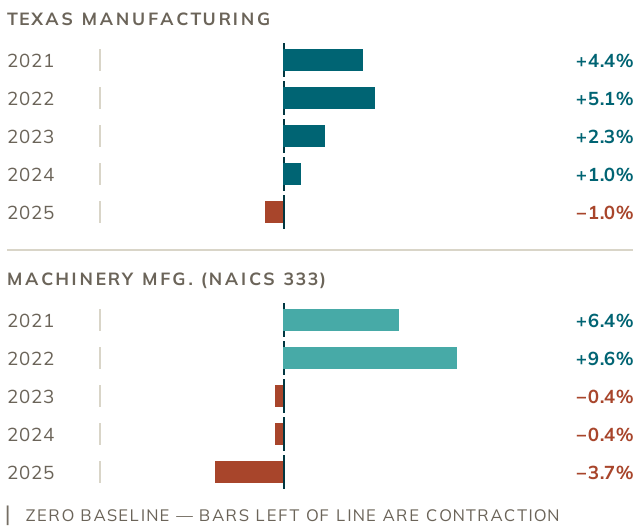
Texas remains one of the largest manufacturing markets in the United States, with a broad industrial base spanning machinery, energy equipment, chemicals, electronics, transportation equipment, fabricated metals and electrical equipment.

DALLAS FED OPERATING CONDITIONS — JULY 2026



Diffusion indexes, not percentages; bars scaled to the highest index shown.
Source: Federal Reserve Bank of Dallas, Texas Manufacturing Outlook Survey.

FIVE-YEAR EMPLOYMENT TREND, YOY



Federal Reserve Bank of Dallas, Texas Employment Data (FRED), December-to-December, not seasonally adjusted. Payroll (CES-based) series — not directly comparable to the 977,500 CBP figure.

DATA
Machinery employment moved from **+9.6%** in 2022 to **−3.7%** in 2025.

→

INSIGHT
The growth cycle in machinery has turned while overall manufacturing has only just flattened.

→

BUSINESS IMPACT
Competitive intensity rises: share is won from rivals rather than from market growth.

KEY FINDING

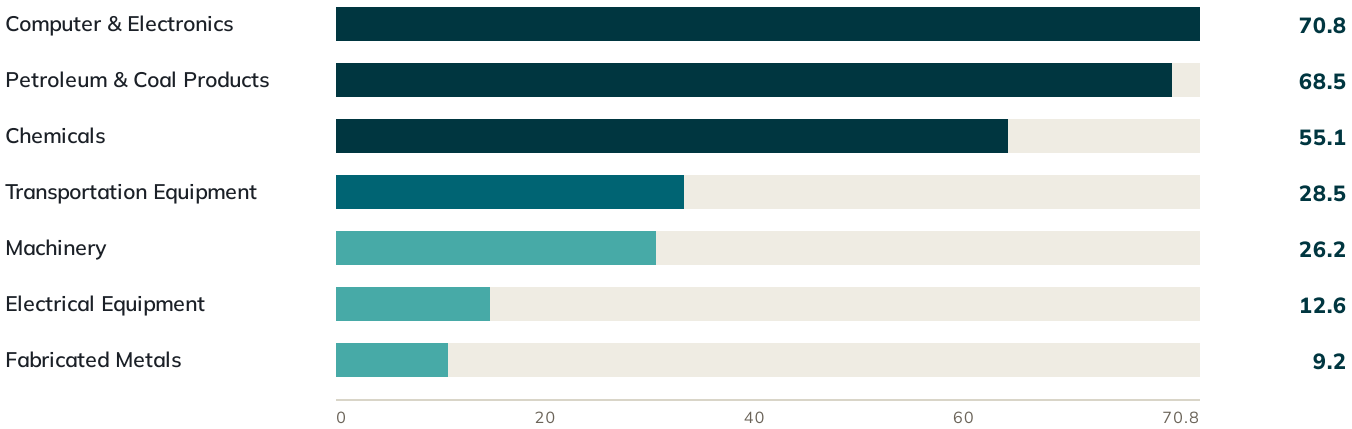
Texas manufacturers are operating in an environment where demand, costs, pricing and capacity are moving at the same time — making current market visibility increasingly valuable.

Sources: U.S. Census Bureau; U.S. Trade Representative; BLS; Federal Reserve Bank of Dallas.

A $299B+ Export Manufacturing Economy

Texas manufacturing extends far beyond oil and gas. The state's industrial economy includes machinery, computers and electronics, chemicals, transportation equipment, electrical equipment and fabricated metals.

MANUFACTURING EXPORTS BY CATEGORY — 2025 (US$ BILLIONS)



Source: USTR Texas Trade Profile, 2025. Machinery and equipment categories highlighted in teal.

$299.6B
Manufacturing GDP
Latest available

$450.3B
Total goods exports
USTR, 2025

$299.3B
Manufacturing exports
USTR, 2025

833,000
Export-related mfg. jobs (est.)
BLS / USTR estimate

Note: these figures come from different reporting periods and datasets and should not be interpreted as one single-year dataset.

DATA
Manufacturing accounts for **$299.3B** of **$450.3B** in Texas goods exports.

→

INSIGHT
Roughly two-thirds of exported goods value originates in manufactured products.

→

BUSINESS IMPACT
Trade terms, tariffs and international pricing move directly through Texas plant economics.

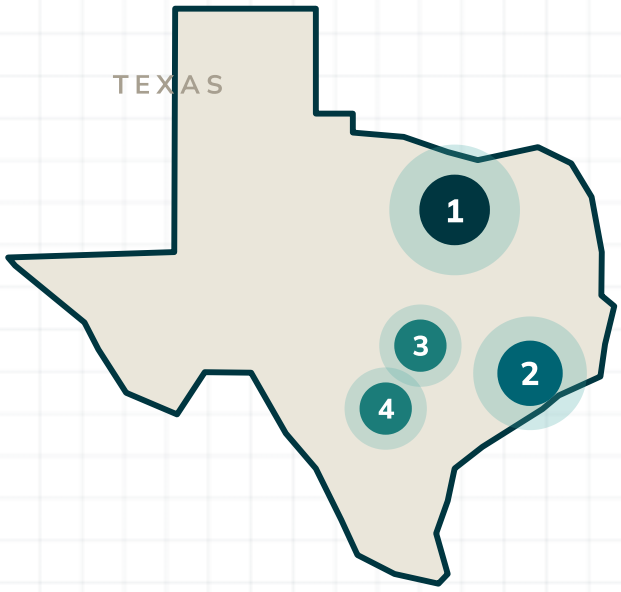
MULTIPLE INDUSTRIAL ECOSYSTEMS, NOT ONE MARKET

EQUIPMENT MANUFACTURERS | ENERGY SUPPLIERS | INDUSTRIAL OEMS | COMPONENT MANUFACTURERS | DISTRIBUTORS | DEALERS | CONTRACT MANUFACTURERS

Each participant group demands a different information set. Sources: USTR Texas Trade Profile; BLS Texas export data.

Where Texas Manufacturing Actually Sits

Industrial activity concentrates in four metropolitan areas, each with a different manufacturing focus. Statewide averages hide those differences.



1 · DALLAS–FORT WORTH
313,300 jobs

2 · HOUSTON
237,000 jobs

3 · AUSTIN
Electronics & semiconductors

4 · SAN ANTONIO
Vehicles & fabricated metal

Circle size indicates relative manufacturing employment where reported. Outline is schematic. Source: BLS Metropolitan Area Employment & Unemployment; Texas economic-development sources.

METRO MANUFACTURING FOCUS

01 Dallas–Fort Worth
Industrial machinery, electrical equipment, electronics, aerospace, material handling, contract manufacturing.

02 Houston
Oilfield equipment, pumps, compressors, valves, chemicals and process equipment, fabricated metal.

03 Austin
Electronics and semiconductor-related manufacturing within the broader Texas technology corridor.

04 San Antonio
Vehicle assembly and supply, fabricated metal and industrial support manufacturing.

Segment composition described qualitatively from BLS metro industry reporting and Texas economic-development sources; Austin and San Antonio employment totals are not reported in this dataset.

WHY THE GEOGRAPHY MATTERS

- Competitor sets differ by metro, not by state line.
- Distributor and dealer networks are regionally organised.
- Published pricing and availability vary by local channel.
- Project and facility activity clusters around each hub.

DATA
Houston and DFW alone account for **550,300** manufacturing jobs.

→

INSIGHT
Industrial demand clusters geographically, and each cluster buys differently.

→

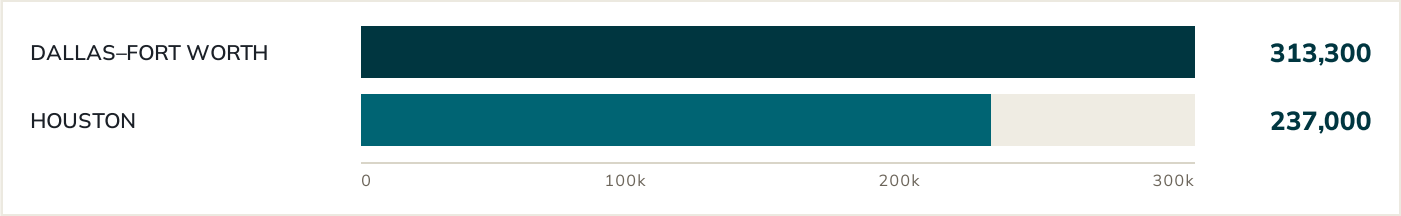
BUSINESS IMPACT
Territory, channel and pricing strategy should be built per metro, not per state.

KEY INSIGHT

Two-thirds of reported Texas metro manufacturing employment sits in Houston and Dallas–Fort Worth, but the products, channels and pricing behind those jobs are different in each.

Houston vs Dallas–Fort Worth

Texas should not be treated as one homogeneous manufacturing market. The two largest hubs represent two different industrial opportunity pools.



Source: BLS Metropolitan Area Employment & Unemployment. Houston Feb 2026; Dallas–Fort Worth Jun 2026 — reference months differ, so this is not a same-month comparison.

HOUSTON

237,000

Manufacturing jobs · February 2026

▼ –1.5% YoY

STRONGEST SEGMENTS

- Oilfield equipment, pumps, compressors, valves
- Chemicals and process equipment
- Fabricated metal and energy machinery
- Industrial suppliers

ENERGY · EQUIPMENT · SUPPLIERS · PRICING

DALLAS–FORT WORTH

313,300

Manufacturing jobs · June 2026

▼ –0.8% YoY

STRONGEST SEGMENTS

- Industrial machinery and electrical equipment
- Electronics and aerospace
- Material handling, transportation equipment
- Fabricated metal, contract manufacturing

PRODUCTS · CATALOGS · COMPETITORS · CHANNELS

TWO MARKETS, TWO DATA PRIORITIES

FOCUS	HOUSTON	DALLAS–FORT WORTH
Demand driver	Oil, gas & process industry capex	Diversified industrial & aerospace demand
Channel structure	Industrial suppliers & energy distributors	Distributors, dealers & contract manufacturers
Priority monitoring	Pricing, availability, supplier capability	Catalogs, specifications, competitor launches

Analytical framing based on segment composition reported by BLS — not an official BLS classification.

DATA

DFW carries **313,300** jobs against Houston's **237,000**, both easing YoY.

→

INSIGHT

Two comparable-sized pools with different demand drivers and channel structures.

→

BUSINESS IMPACT

One national price list and one competitor list will misread at least one of the two hubs.

KEY INSIGHT

Houston is the stronger energy-equipment market. DFW is the stronger diversified industrial-manufacturing market.

Where Product Data Becomes Complex

Industrial machinery is primarily represented by NAICS 333, spanning multiple specialised equipment categories that each carry their own catalogs, configurations and documentation.

NAICS 333 SUB-INDUSTRIES IN SCOPE

01 Oil & gas machinery 333120 / 333132	**02** Pumps 333911	**03** Compressors 333912	**04** Mining machinery 333131
05 Power transmission 333613	**06** Material handling 333920	**07** HVAC equipment 333415	**08** Industrial machinery 333999

Ordering reflects relevance to the Texas industrial base described in this report, not official size ranking. Source: U.S. Census Bureau NAICS definitions.

$26.2B
Texas machinery exports
▼ –3.7% YoY · NAICS 333 employment, 2025
USTR, 2025 · FRED, Dec–Dec

41.3
Raw-material prices-paid index
Dallas Fed, July 2026 · diffusion index

12.2
Capital-expenditure index
Dallas Fed, July 2026 · diffusion index

Note: the export figure is machinery-specific. The Dallas Fed indexes represent the broader Texas manufacturing sector and are not limited to NAICS 333.

WHAT MACHINERY MANUFACTURERS MANAGE

HUNDREDS OF PRODUCTS → MULTIPLE CONFIGURATIONS → ACCESSORIES → REPLACEMENT PARTS → TECHNICAL DOCUMENTS

DISTRIBUTORS → DEALERS → REGIONAL PRICING → AVAILABILITY

This can create differences between manufacturer catalogs, distributor catalogs, dealer prices, specifications, technical documents, availability, model numbers and product descriptions. Research into manufacturing product-information management identifies synchronization and integration problems across manufacturers, suppliers, customers and distributors.

DATA OPPORTUNITY

PRODUCT INTELLIGENCE · COMPETITOR MONITORING · PRICE INTELLIGENCE · DISTRIBUTOR MONITORING · SPECIFICATION MONITORING

DATA
Machinery exports of **$26.2B** alongside **–3.7%** employment change.

→

INSIGHT
High-value output is being produced by a workforce that is no longer expanding.

→

BUSINESS IMPACT
Catalog and specification accuracy has to scale without adding headcount to maintain it.

Houston's Energy Equipment Ecosystem

Houston represents a particularly important market for manufacturers connected to oil, gas and industrial processing.

KEY EQUIPMENT CATEGORIES

PUMPS
Production, transfer, injection, processing

COMPRESSORS
Gas processing, pipelines, industrial systems

VALVES
Flow control, pressure control, process systems

DRILLING EQUIPMENT
Drilling, completion, well servicing

FILTRATION SYSTEMS
Water, chemical, oil & gas processing

PRESSURE CONTROL
Wells, pipelines, processing

FABRICATED COMPONENTS
Pressure vessels, frames, skids

PROCESS EQUIPMENT
Refining, chemical, petrochemical, midstream

CURRENT MARKET INDICATORS

237,000
Houston mfg. employment
▼ −1.5% YoY
BLS, Feb 2026

$26.2B
Texas machinery exports
USTR, 2025

$55.1B
Chemical exports
USTR, 2025

$68.5B
Petroleum / coal products
USTR, 2025

SIGNALS FROM MACHINERY MANUFACTURERS — JULY 2026

STRONG OIL-RELATED DEMAND | RAW-MATERIAL COST ESCALATION | INVESTMENT IN MACHINERY | PRODUCTIVITY INITIATIVES | BACKLOG GROWTH | COMPETITIVE PRICING PRESSURE | FASTER DELIVERY PRESSURE

Drawn from July 2026 Dallas Fed survey comments by machinery manufacturers — these are survey comments, not statistical estimates of every Texas machinery company.

EXTERNAL INTELLIGENCE THAT CAN MATTER

COMPETITOR PRICING | SUPPLIER CAPABILITIES | EQUIPMENT AVAILABILITY | PRODUCT SPECIFICATIONS | DISTRIBUTOR LISTINGS | FACILITY / PROJECT ACTIVITY | PRODUCT CHANGES

DATA
Prices paid **41.3** with new orders at **6.4** and future production at **34.6**.

→

INSIGHT
Costs are climbing faster than current order flow, while expectations stay positive.

→

BUSINESS IMPACT
Quoting windows tighten — competitor pricing and availability need to be tracked continuously.

Source: Federal Reserve Bank of Dallas Texas Manufacturing Outlook Survey, July 2026; USTR; BLS.

Costs, Trade, Labor & Supply Chain

The current environment is not being driven by one problem. Manufacturers are dealing with several pressures simultaneously.

77.0%
Cited trade uncertainty as a top challenge
NAM Q2 2025 Survey

66.1%
Cited increased raw-material costs
NAM Q2 2025 Survey

+5.8%
Expected input-cost increase
NAM Q2 2025 Survey

80.3%
Paying tariffs on imported inputs
Q4 2025

58.6%
Paying Section 232 tariffs
Q4 2025

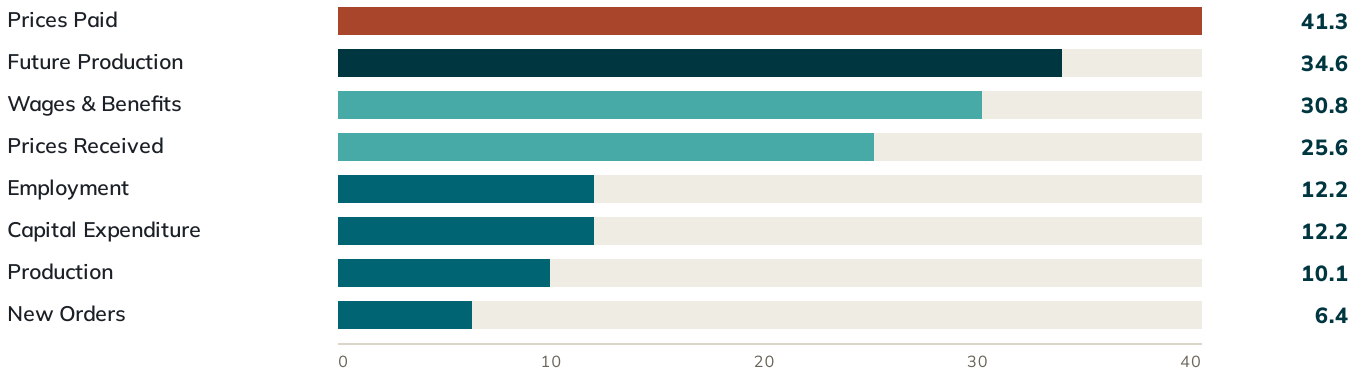
50.0%
Paying Section 301 tariffs on China
Q4 2025

~60%
Report difficulty attracting / retaining workers
NAM Survey

409,000
Manufacturing positions estimated unfilled
August 2025

81 days
Average raw-material delivery time
October 2024

TEXAS OPERATING SIGNALS — JULY 2026 (DIFFUSION INDEX)



Diffusion indexes, not percentages. Bars scaled to the highest index shown. Source: Federal Reserve Bank of Dallas.

DATA
80.3% pay tariffs on imported inputs; delivery times average **81 days**.

→

INSIGHT
Landed cost and lead time now change faster than annual planning cycles.

→

BUSINESS IMPACT
Sourcing alternatives and supplier capability data must be refreshed continuously, not annually.

THE BIGGER PICTURE

Manufacturers are simultaneously watching demand, input costs, wages, pricing, capacity and supply-chain conditions.

This creates a stronger need for current information, but the data does not prove that every manufacturer currently uses web-based intelligence — that connection is an analytical conclusion rather than an official statistic. Sources: National Association of Manufacturers; Federal Reserve Bank of Dallas.

The Data Signals Manufacturers Need to Monitor

Eight external information streams sit around every industrial manufacturer. Each one is public, each one changes constantly, and each one is held in a different place.

COMPETITOR PRICES
Published list and dealer pricing across rival catalogs

PRODUCT LAUNCHES
New models, revisions and discontinuations

DISTRIBUTOR LISTINGS
How and where products are represented

SUPPLIERS
Capabilities, certifications, locations, alternates

The Texas Manufacturer
EIGHT LIVE SIGNALS

SPECIFICATIONS
Technical documents, model numbers, configurations

PRODUCT AVAILABILITY
Stock position and lead times visible in channel

FACILITIES
Plants, expansions and project activity

MARKET CHANGES
Industry developments and company changes

Framework derived from the product, competitive, channel, supplier and market information categories identified in this research.

WHERE EACH SIGNAL SITS

CATEGORY	INFORMATION MONITORED
Product	Catalogs · SKUs · model numbers · specifications · technical documents · replacement products
Competitive	New launches · discontinuations · competitor pricing · market positioning · new facilities
Channel	Distributor listings · dealer pricing · availability · regional assortment · channel promotions
Supplier	Capabilities · alternative suppliers · certifications · locations · product categories
Market	Facilities · expansions · project activity · industry developments · company changes

FIVE PRACTICAL INTELLIGENCE OPPORTUNITIES

01 Competitor product & price monitoring
Track catalogs, models, specifications and product changes across competitors.

02 Catalog & specification extraction
Structure product data that is published inconsistently across sources.

03 Distributor & dealer monitoring
See how products are represented, priced and stocked in the channel.

04 Supplier & alternative-source intelligence
Identify capabilities, certifications, locations and alternate sources.

05 Availability, facility & market monitoring
Keep products, prices, suppliers, facilities, distributors and competitors current.

These are analytical conclusions drawn from the research, not official statistics claiming every manufacturer has the same problem. Public prices are not the same as negotiated contract prices.

10 — CONCLUSION

The Market Is Moving. The Question Is How Quickly You Can See It.

Demand, input costs, pricing, capacity and supply-chain conditions are all shifting at once. The constraint is no longer the availability of information — it is the speed at which scattered public information becomes usable.

FROM PUBLIC INFORMATION TO BUSINESS DECISIONS

FINAL INSIGHT

The challenge is not simply having more information — it is having the right information, in a structured format, and keeping it current.

20,781
Establishments to keep visibility of
U.S. Census Bureau, CBP

550,300
Manufacturing jobs across Houston + DFW
BLS, differing reference months

41.3
Prices-paid index against 25.6 received
Dallas Fed, July 2026

ABOUT THE RESEARCH

This report combines publicly available information from the U.S. Census Bureau, U.S. Bureau of Labor Statistics, U.S. Trade Representative, Federal Reserve Bank of Dallas, National Association of Manufacturers, Deloitte, and Texas economic-development sources. Research period: 2025–2026.

METHODOLOGY NOTE

Statistics from different datasets may cover different years, months, definitions and populations. Dallas Fed values are diffusion indexes, not percentages. NAM statistics represent survey respondents. Metro employment figures may use different reference months. Analytical conclusions are labeled as such throughout.

DataDwip

RESEARCH PARTNER · DATA INTELLIGENCE PROVIDER

Turning Public Data Into Structured Business Intelligence

This report was researched and produced by DataDwip, which helps organizations collect, structure and monitor publicly available web data across products, competitors, suppliers, distributors, prices and markets.