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BRAZORIA COUNTY  
**ECONOMIC  
INDICATORS**

A QUARTERLY NEWSLETTER OF THE



BRAZOSPORT COLLEGE  
**ECONOMIC FORECASTING CENTER**

# BRAZORIA COUNTY ECONOMIC INDICATORS APRIL 2026



## SIGNS OF RECOVERY: LEADING INDEX TURNS POSITIVE

### LEADING ECONOMIC INDICATORS

The Brazoria County Index of Leading Economic Indicators increased 4.28 percent over the past month and 4.32 percent over the past year. Designed to forecast the county's economic performance over the next three to six months, the index rose sharply in January and February and has been above the six-month moving average for seven consecutive months (Figure 1). This sustained period above the moving average is significant, as it typically signals the early stages of economic growth. The recent gains suggest that the local economy may be emerging from its recent slowdown and that economic conditions are likely to continue improving in the months ahead.

In February, two of Brazoria County's four leading economic indicators posted year-over-year increases. After experiencing declines at the end of 2024 and throughout 2025, the Brazoria County Stock Index started 2026 much stronger. The index increased 22.82 percent over the first two months of the year and was up 10.20 percent over the last year. This strong start suggests renewed investor confidence and growing optimism regarding the future earnings and outlook of the largest locally based manufacturers (Figure 2). The local auto market also continued to strengthen, with new retail auto sales rising 5.31 percent compared to the same month last year, reflecting stronger consumer confidence. In contrast, new single-family building permits declined 23.14 percent year-over-year, suggesting a cooling in residential construction activity. Most new developments remain concentrated in the northern part of Brazoria County with Marvel leading the way with 862 new permits filed in the last year (Figure 3). Average initial unemployment claims rose 5.88 percent over the past year, signaling the continued softening in local labor market conditions.

### CURRENT ECONOMIC INDICATORS

The Brazoria County Index of Current Economic Indicators increased by 0.57 percent in December but decreased 0.60 percent over the past year, reflecting a slight slowdown in overall economic activity. Declines in Hotel/Motel Tax Receipts and Sales Tax Receipts in the county outweighed the benefits of easing inflation and modest employment growth over the past year. Hotel/Motel Tax Receipts fell 4.43 percent year-over-year, suggesting reduced demand from temporary workers and fewer travel-related stays compared to the prior year. Sales Tax Receipts were 27.51 percent higher in December when compared to November but 6.69

FIGURE 1: Leading Economic Index

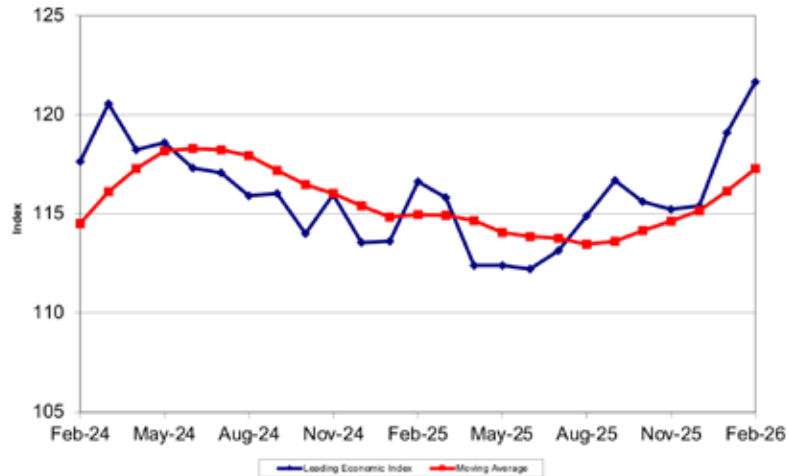
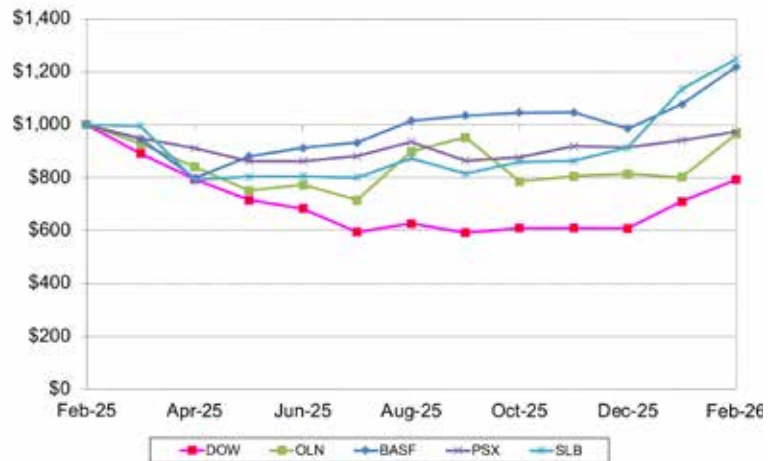
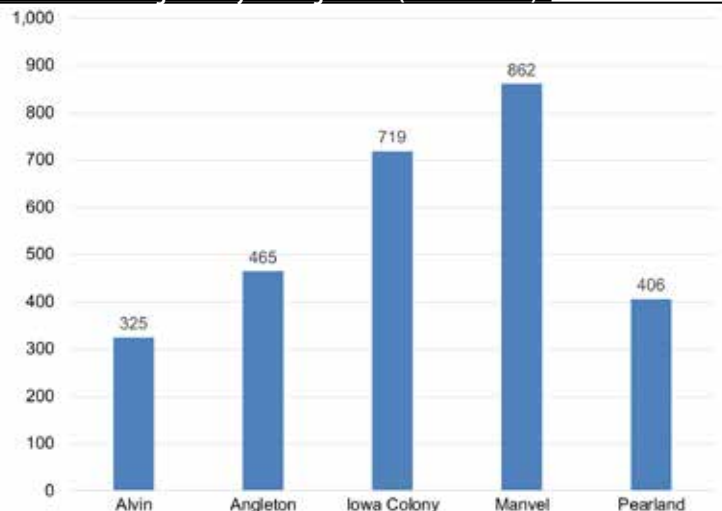


FIGURE 2: BC Stock Index – Company Performance

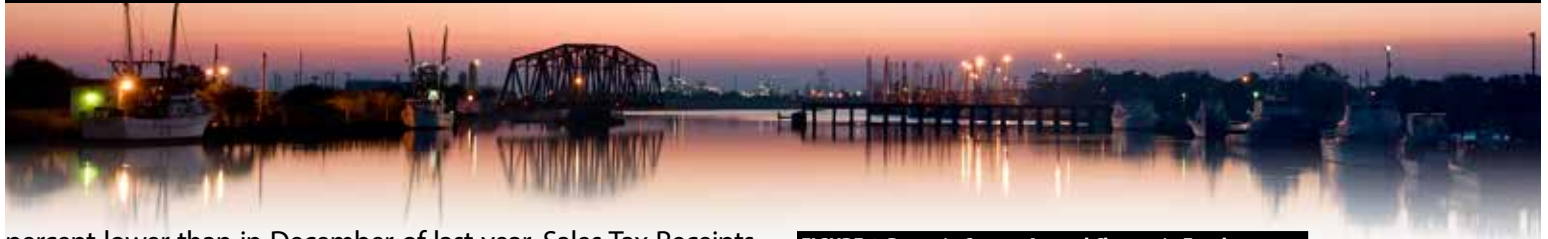


Source: Bloomberg

FIGURE 3: New Single-Family Building Permits (last 12 months)



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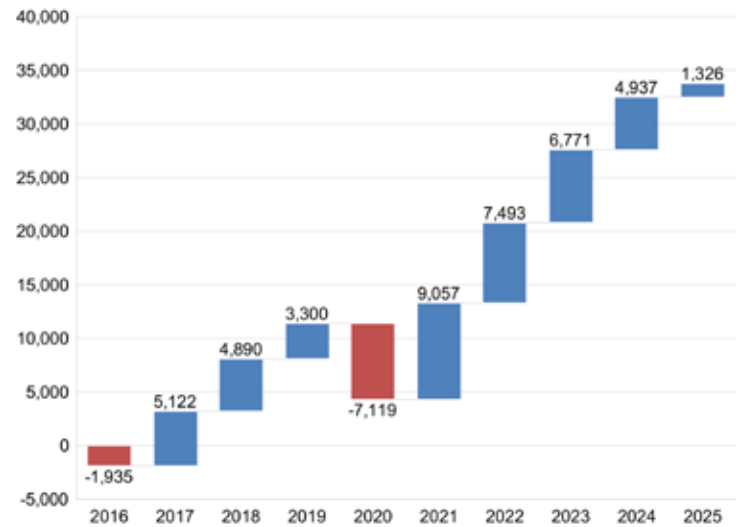


percent lower than in December of last year. Sales Tax Receipts in December are typically higher than November due to holiday shopping activity; however, the year-over-year decline points to softening consumer spending and a cooling local economy. The Houston–The Woodlands–Sugar Land Consumer Price Index rose 1.65 percent over the past year, providing some relief to local households and businesses. However, inflationary pressures may increase in the near term due to the ongoing conflict in the Middle East negatively impacting global oil supply chains, leading to a sharp rise in gasoline and diesel prices. These higher fuel costs increase transportation expenses and are expected to place upward pressure on the price of goods and services. Total employment within the county increased from 191,817 to 193,143, remaining below the all-time high of 194,292 reported in April 2025. Over the past decade, the county has added 33,842 jobs, but job growth has slowed, with only 1,326 jobs added in 2025 compared to 4,937 in 2024 and 6,771 in 2023 (Figure 4). The current economic index was slightly above the six-month moving average in November and December but has remained below this threshold for eleven of the last fifteen months, signaling that Brazoria County continues to experience a period of slow or modest economic growth (Figure 5).

## LAGGING ECONOMIC INDICATORS

The Brazoria County Index of Lagging Economic Indicators is designed to confirm either growth or slowdown in the local economy. The index decreased 1.16 percent in December and 5.71 percent over the past year, signaling continued weakness in local economic conditions. The largest negative contributor was the sharp rise in foreclosure notices, which increased 34.33 percent compared to the same period last year, reflecting growing financial strain among some households. While the prime rate dropped from 7.65 percent to 6.83 percent over the last year further interest rate cuts are more uncertain due to the increase in oil prices. The Federal Reserve faces a policy dilemma as cutting rates too soon could reignite inflation, while keeping them elevated may further weaken the labor market. The county's unemployment rate also edged higher, rising to 4.48 percent from 4.05 percent one year ago, indicating softening labor market conditions consistent with slower employment growth and rising unemployment claims. After consistently remaining above the six-month moving average for more than four years, the lagging index has now fallen below the moving average for over twelve consecutive months, confirming that the local economy has been experiencing a period of slow economic growth.

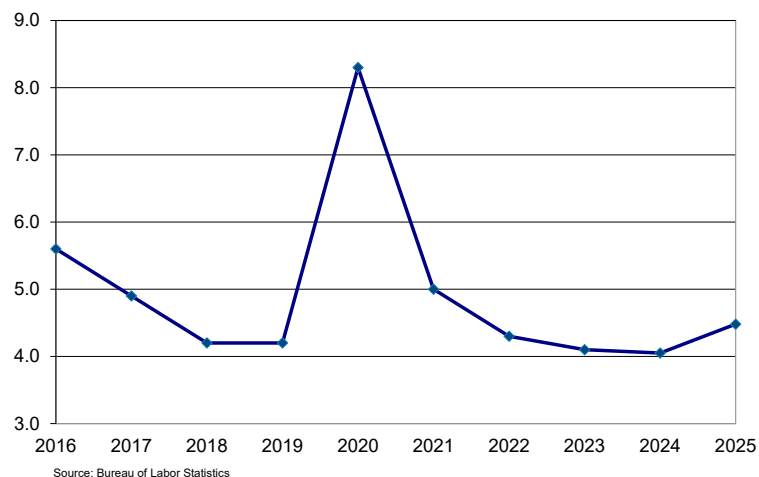
**FIGURE 4: Brazoria County Annual Change in Employment**



**FIGURE 5: Current Economic Index**



**FIGURE 6: Brazoria County Unemployment Rate**



# BRAZORIA COUNTY TEXAS BUSINESS CYCLE INDICATORS APRIL 2026

<b>Brazoria County Economic Indices:</b>	<b>Feb 2025</b>	<b>Jan 2025</b>	<b>Dec 2025</b>	<b>Nov 2025</b>	<b>Oct 2025</b>
Leading Economic Index (2003 = 100)	121.67	119.11	115.42	115.23	115.63
Current Economic Index (2003=100)	-	-	218.71	217.47	214.31
Lagging Economic Index (2003 = 100)	-	-	161.74	163.63	165.48

<b>Brazoria County Leading Economic Index</b>	<b>Feb 2026</b>	<b>Jan 2026</b>	<b>Feb 2025</b>	<b>Jan-2026 to Feb-2026</b>	<b>Feb-2025 to Feb-2026</b>
Leading Economic Index (2003 = 100)	121.67	119.11	116.63	2.15%	4.32%
<b>Components:</b>					
Brazoria County Stock Index (12/31/2003 = 100)	206.96	185.73	187.81	11.43%	10.20%
Average Initial Unemployment Claims (Seasonally Adjusted)	261	262	242	-0.31%	7.96%
Average Initial Unemployment Claims (Unadjusted)	234	232	221	0.86%	5.88%
New Single Family Building Permits (Seasonally Adjusted)	310	318	314	-2.46%	-1.46%
New Single Family Building Permits (Unadjusted)	299	358	389	-16.48%	-23.14%
New Retail Auto Sales (Seasonally Adjusted)	2,211	2,003	2,099	10.36%	5.31%
New Retail Auto Sales (Unadjusted)	2,003	1,817	1,902	10.24%	5.31%

<b>Brazoria County Current Economic Index</b>	<b>Dec 2025</b>	<b>Nov 2025</b>	<b>Dec 2024</b>	<b>Nov-2025 to Dec-2025</b>	<b>Dec-2024 to Dec-2025</b>
Current Economic Index (2003 = 100)	218.71	217.47	220.02	0.57%	-0.60%
<b>Components:</b>					
Sales Tax Receipts (Constant 1982-1984 \$'s, Seasonally Adjusted)	1,417,887	1,382,714	1,376,408	2.54%	3.01%
Sales Tax Receipts (Current \$'s, Unadjusted)	4,261,789	3,342,253	4,567,501	27.51%	-6.69%
Household Employment (Seasonally Adjusted)	192,289	192,267	189,355	0.01%	1.55%
Household Employment (Unadjusted)	193,143	193,817	191,817	-0.35%	0.69%
Hotel/Motel Tax Receipts (Constant 1982-1984 \$'s, Seasonally Adjusted)	2,397,316	2,418,008	2,549,733	-0.86%	-5.98%
Hotel/Motel Tax Receipts (Current \$'s, Unadjusted)	4,954,779	5,591,985	5,184,306	-11.39%	-4.43%
Houston-The Woodlands-Sugar Land CPI	277.45	278.11	272.95	-0.24%	1.65%

<b>Brazoria County Lagging Economic Index</b>	<b>Dec 2025</b>	<b>Nov 2025</b>	<b>Dec 2024</b>	<b>Nov-2025 to Dec-2025</b>	<b>Dec-2024 to Dec-2025</b>
Lagging Economic Index (2003 = 100)	161.74	163.63	171.53	-1.16%	-5.71%
<b>Components:</b>					
Brazoria County Foreclosure Notices (Adjusted)	69	66	56	4.58%	22.97%
Brazoria County Foreclosure Notices (Unadjusted)	90	63	67	42.86%	34.33%
Prime Rate Charged By Banks	6.83	7.00	7.65	-2.43%	-10.72%
Unemployment Rate (Adjusted)	4.62%	4.62%	4.39%	-0.02%	5.40%
Unemployment Rate (Unadjusted)	4.48%	4.74%	4.05%	-5.49%	10.62%

\*(The Current and Lagging Indexes are two months behind due to BLS delays from the partial government shutdown. Local county employment and unemployment data for January is now scheduled for release in April 2026.)