2026 TEXAS PRIMARY ELECTION RESULTS: HOW TEXAS POLITICS IMPACTS YOUR MARKET

Date: 10 March 2026

US Policy and Regulatory Alert

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Texas is home to 31.3 million people, and with two of the country's leading metropolitan areas by economic output, Texas is the world's eighth largest economy at US$2.7 trillion. Texas leads its fellow states in energy production, consumer exports, corporate expansion and total job creation, and foreign direct investment. The enormity of the Texas economy cannot be separated from national and global markets, and state political trends directly impact economic growth and output. While the old saying goes that “all politics is local,” it has proven to be true that Texas politics are global.

While Texas has been dominated at the state level by the Republican Party for more than 30 years, the state has proven to be a major factor in the national political conversation no matter which party controls Washington, DC. During Republican administrations, the Texas legislature has served as a fast track to national party priorities, including immigration, voter identification requirements, and mid-decade redistricting maps. During Democratic administrations, the state has served as a challenger to environmental, healthcare, and immigration policies, often through suits filed by the state attorney general.

In turn, the primary election here has taken center stage as the nation prepares for a contentious and expensive midterm election cycle. Unofficial voter participation numbers by party show Democratic voter turnout is notably higher than previous cycles, and outpaced Republicans by more than 110,000 votes.[1] The total campaign expenditure for US Senate topped US$122 million between all candidates, making it the most expensive primary race in Texas history. US$70 million of that total was in direct buys from incumbent Senator John Cornyn (R-TX).

While most races were decided on the 3 March Election Day, multiple key races are now in a 12-week runoff concluding on 26 May. These races, especially the runoff for the Republican nomination for US Senate, will continue to set spending records, drawing time, attention, and resources from other states in similar scenarios. Twenty-four percent of the 18.7 million registered voters voted in the primary, including 2.3 million Democrats, and 2.2 million Republicans. This is the first time since the 2020 presidential election that Democrats voted in higher numbers than Republicans.

STATEWIDE OFFICES

The race for governor is set between incumbent Governor Greg Abbott (R-TX) and State Representative Gina Hinojosa (D-TX). Hinojosa defeated eight other Democrat candidates in the primary and is completing her fifth term in the state house. Abbott easily won the Republican Primary after facing ten challengers and began the race with more than US$106 million in campaign funds. Hinojosa has raised approximately US$1.3 million. Abbott

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is widely credited for making immigration a top line national issue by creating a taxpayer funded bussing program where illegal immigrants were sent to predominantly Democrat leaning cities around the country. Recent national polling on immigration issues and the use of various law enforcement agencies to enforce the Trump administration's immigration policies have become a net negative polling issue, and driving the undoing of years of Republican gains among Latino voters, particularly along the border counties. This will continue to create opportunity districts for Democrats that will ultimately cause the Republican fundraising apparatus to spend significant resources defending seats in Texas.

The race for lieutenant governor is between incumbent Lieutenant Governor Dan Patrick (R-TX), and either State Representative Vikki Goodwin (D-TX) or Houston-area community activist Marco Velez (D-TX). Patrick has US$31.7 million cash on hand, and has served as lieutenant governor since 2015. The office of lieutenant governor presides over the state Senate, similar to the manner in which the vice president in the US Senate. However, unlike the vice president, the office of lieutenant governor is an independently statewide elected office. Patrick has promoted some of the most socially conservative policies during his time in office, including Preventing *Sharia Law in Texas* and *Promoting America & Texas First* in school curriculum. Patrick is a key ally to the Trump administration both in the legislature, and to the Trump campaign. Goodwin is a licensed realtor by profession, served in the Texas House for four terms, and has raised just over half a million dollars in the race.

The race for comptroller of public accounts is the most important statewide race to which many observers are not paying enough attention. As Texas' chief financial officer, tax collector, accountant, revenue estimator, treasurer, cashier and purchasing manager, the agency is responsible for the accounting of the US$338 billion Texas budget. The office also collects taxes and fees owed to the state. This was a rare instance of President Donald Trump and Abbott with opposing endorsements between Acting Comptroller Kelly Hancock (R-TX) and former State Senator Don Huffines (R-TX). Abbott spent more than US$3.4 million supporting Hancock only to lose to Huffines by nearly 35 points. Huffines is an ultraconservative running predominantly on social issues that have little to do with the office. The key responsibility, and what could give Huffines an outsized influence over the legislative and executive branches, is the biennial revenue estimate. This estimate gives the legislature a baseline number to build the proceeding state budget. Huffines has expressed interest in applying a Department of Government Efficiency (DOGE) model to the office, which may be done in a way that will directly impact state program implementation, like education savings accounts, the State Energy Conservation Office, the Texas Broadband Development Office, etc. Huffines will face former county judge and current state senator Sarah Eckhardt (D-TX) in the fall.

The race to replace Attorney General Ken Paxton (R-TX) will also be decided in a runoff between Congressman Chip Roy (R-TX) and State Senator Mayes Middleton (R-TX). Roy received a last-minute positive mention, though not a full endorsement, from Trump during a multicandidate campaign event in Corpus Christi, Texas, and enjoys the highest statewide name recognition of the field. Middleton is an ultraconservative member of the Texas Senate who predominantly self-funded his campaign to the tune of US$11.8 million. The winner will face off against State Senator Nathan Johnson (D-TX) or perennial candidate Joe Jaworski (D-TX) in the fall. The office has been held by a Republican since 1999 when US Senator John Cornyn (R-TX) held the office. Paxton often found himself as lead plaintiff or joining multiple suits against former Presidents Barrack Obama and Joseph Biden era policies, often being heard in front of the United States Supreme Court. The office has often been used as a springboard to higher office as was the case for Cornyn, Abbott, and potentially Paxton himself.

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With the offices of governor and lieutenant governor looking like safe Republican holds, a Democrat win in the race for attorney general would be significant. This is another race where more Democrats voted in the primary than Republicans, though only narrowly. If Democrats maintain their high turnout numbers then this will be a race to watch.

US SENATE

The most expensive Republican primary race in United States history will continue another 12-weeks, with the 24-year career of Texas' senior US senator on the line. After a heated eight way primary with state Attorney General Ken Paxton, Congressman Wesley Hunt (R-TX), and others, Cornyn exceeded expectations to place first in the race with 41.9%, Paxton finished second at 40.7%, and Hunt with 13.5%. Cornyn spent more than US$70 million to get into the runoff and was a guest on Air Force One for a campaign stop in Corpus Christi, Texas late last week. The president called Cornyn a “great Senator” but also made recent positive mention of Paxton as well. Paxton famously led the *Texas v. Pennsylvania* suit in 2020 that challenged the presidential election results in four states former President Biden won. Those four states were; Wisconsin, Michigan, Pennsylvania, and Georgia. The case was declined by the United States Supreme Court. Should Paxton prevail, it would be a decisive shift to the right of Cornyn. In the eyes of many Democrats this is a more favorable general election match up in the fall. No other candidate who failed to make the runoff has endorsed at this time. President Trump has stated he will formally endorse a candidate and call for the other candidate to withdraw.

Democrats have selected State Representative James Talarico (D-TX) as their candidate for the US Senate seat. Talarico defeated Congresswoman Jasmine Crockett (D-TX) 52% to 46%. After some controversy surrounding the closing times of Dallas County polling locations, there was ultimately not enough outstanding votes to change the outcome. Talarico performed well with Latino voters along the border, and throughout West Texas. While polling fluctuated greatly depending on the day, Crocket's strongholds of Dallas, Fort Worth, Houston, and deep East Texas were not enough. Despite earlier concerns over disenfranchisement, she conceded the race and called for unity. Talarico can now take advantage of a continuing, and often vitriolic, Republican primary that has pitted the ultraconservative and moderate wings of the party against each other. Democrats see the opportunity to win Texas as a key step in regaining control of the US Senate, and draining Republican resources from races in states like North Carolina and Maine. Should Paxton prevail in the runoff, it is the Democrat's hope that Republican doners and campaign structures will be occupied in defending the seat in a historically safe state and reduced resources for other states, particularly swing states. Regardless of the general election outcome, this race will have implications for a great many other races.

US HOUSE

Nine of the 38 members from the Texas Congressional Delegation announced their retirement or intention to run for another office, and it saw the first House incumbent in the country to lose a primary. Dan Crenshaw (R-TX) lost to Trump-endorsed State Representative Steve Toth (R-TX) in spite of significantly outraising his opponent. Tony Gonzales (R-TX) was initially in a runoff for the Republican nomination with perennial opponent Brandon Herrera (R-TX). Gonzales trailed Herrera 41% to 43%. However, Gonzales withdrew from consideration after an investigation by the House Ethics Committee for sexual misconduct and inappropriate favoritism in relation to an admitted affair with a former staffer. Democrats will also see two incumbents forced into runoffs in the Dallas and

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Houston areas. Incumbent Julie Johnson (D-TX) trailed former Congressman Colin Allred (D-TX) by 11 points, 33% to 44%. Allred previously represented the area before challenging Senator Ted Cruz (R-TX) in 2024. A duel incumbent scenario was created by the Republican led mid-decade redistricting maps for Christian Menefee (D-TX) and longtime Congressman Al Green (D-TX) for the newly redrawn 18th district. Menefee led Green 46% to 44% after Menefee just won the special election runoff five weeks ago to replace deceased Congressman Sylvester Turner (D-TX).

While the redistricting maps from 2020 were generally beneficial to incumbents on both sides of the aisle, the 2025 congressional map to create five Republican opportunity districts were ultimately carved from safe Republican districts based on the last presidential election results. Without President Trump on the ballot, sinking poll numbers for Republicans among Latino and independent voters, and rising Democrat voter enthusiasm and fundraising levels, Texas should be a major concern for a Republican Party looking to defend the slimmest of congressional majorities. Of the 38 members of the Texas Delegation, 13 are Democrats and 25 are Republican. It is worth noting, seven Republican seats are +ten R or less.

TEXAS STATE LEGISLATURE

In Texas legislative primaries, candidates compete in partisan contests to secure each party's nomination for state Senate and House seats; if no candidate receives a majority (>50%) of votes, the top two advance to a runoff. Because Texas has no party registration, voters may choose which party primary to participate in, but can only vote in one party's primary or runoff election. Primary turnout, local precinct organization, and often high-profile endorsements frequently determine outcomes in down-ballot legislative races. The 2020 legislative redistricting map and the targeted recruitment of challengers have intensified intra-party contests, making this primary election especially heated. In recent election cycles, both parties are experiencing increasingly crowded primary contests of three or more candidates, making the runoff elections an increasingly probable and expensive reality. The runoff election will take place on 26 May 2026. There is no runoff for the general election in the fall. The winners of this primary will face off in the general election on 3 November 2026 for the opportunity to serve in the 90th Texas Legislature, beginning 12 January 2027.

TEXAS SENATE

The Texas Senate is currently comprised of 18 Republicans, 12 Democrats, and one vacancy in a Republican district. Five seats were open this cycle, in addition to Taylor Rehmet (D-TX) who won a special election to replace Kelly Hancock (R-TX) on 30 January 2026. This race was a surprise loss to many Republicans, as the Fort Worth area district last elected a Democrat in 1991. The rematch between Rehmet and Leigh Wambsganss (R-TX) for Senate District 9 in November is drawing a tremendous amount of national Democrat attention to down-ballot Texas races. Republicans will need to decide how best to allocate their resources to un-flip the seat, given that even with a Democrat in that office, it does not change the Senate majority under the three fifths majority rule. Republican candidates spent ten times the amount Rehmet spent to lose by double digits in the special election and special election runoff. With more defense to play than offense for Republican officeholders around the state, this seat may be considered an acceptable loss, for now.

There were five Texas senators with hot races, 11 senators who were unopposed or had low-risk primaries, and fifteen senators who were not on this year's ballot because their terms expire in 2028. The probable new Senators

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in the Texas Senate will be: Rep. David Cook (R-TX), Rep. Dennis Paul (R-TX), Rep. Trent Ashby (R-TX), Republican nominee Brett Ligon (R-RX), and the winner of the Senate District 9 race described above. Each of the Republicans would represent a hold for the party in those districts.

TEXAS HOUSE OF REPRESENTATIVES

All 150 members of the Texas House of Representatives are up for re-election every two-year cycle. Prior to this election, the Texas House was comprised of 88 Republicans and 62 Democrats. In this race, there were 39 incumbents facing challengers. Three incumbents lost outright, and one incumbent was forced into a runoff. Twenty-one members are retiring, including 14 Republicans and seven Democrats. At least 24 new members are expected to join the Texas House in 2027.

The three incumbent members of the Texas House who lost their primary elections are: Stan Kitzman (R-TX), Cecil Bell, Jr. (R-TX), and Chris Turner (D-TX). Turner and Bell had the longest tenure of the three primary losses, both serving in senior leadership positions within their parties, and as committee chairmen during their time. Looking ahead to the general election in November, at least six House districts can be considered in 'swing' territory, and are expected to be highly competitive.

Should the high tide of any 'Blue Wave' be lower than a Democrat majority in the Texas House, even a slimmer Republican majority for Speaker of the Texas House Dustin Burrows (R-TX) could prove to be problematic. Speaker Burrows was elected in 2025 in large part thanks to Democrat support. However, even with that support, he still ended the longtime practice of appointing minority party members as committee chairs. Adding to the partisan divide, the redrawn congressional districts to favor five new Republican districts led to Democrats breaking quorum to prevent a vote on those maps. The quorum break made national headlines and triggered multiple state legislatures to redraw their own congressional maps. The quorum break delayed the implementation but did not prevent them from becoming law. The United States Supreme Court ruled 6-3 in favor of the Texas map. However, the court also unanimously allowed the California Proposition 50 map, which added five Democrat leaning districts at the expense of five Republican districts.

The actions of the Texas Legislature not only impacted the decision California legislature, but led legislatures in Missouri, North Carolina, Ohio, Utah, Maryland, and Virginia to tinker with their congressional maps as well. This is just the most recent example of how Texas is driving political initiatives around the country that ultimately impact national political trends. Along with California and New York, Texas drives the national political narrative. There is no entity with a political or economic interest in the United States, regardless of where it is headquartered, that is not impacted by the decisions made in these three markets.

The legislature will begin the 90th Regular Session on 12 January 2027, and run for 140 calendar days, adjourning 31 May 2027. Representatives and Senators can prefile bills just days after the General Election, starting 9 November 2026. Between now and then, Texas will see the most expensive, competitive, and consequential midterm election cycle in our history.

FOOTNOTES

[1] Vote counts in this publication are not yet certified by the Texas Secretary of State, and may vary slightly upon

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