



Colliers

HOUSTON MSA

2026

Manufacturing
Snapshot



Major Recent Announcements

Eli Lilly Pharmaceutical Plant (Harris County) - \$6.5B

This is a landmark project for the region. Eli Lilly is building a 1M SF facility to produce active pharmaceutical ingredients (API). It is the first of its kind in Texas and is expected to create over 600 high-paying jobs, solidifying Houston's position as a major "Third Coast" life sciences hub.

Bristol Myers Squibb Manufacturing Campus (Harris County) - \$1.0B

Bristol Myers Squibb has filed for a 10-year tax abatement, proposing a \$1B capital investment to build a 600,000 SF pharmaceutical plant. The project would bring nearly 500 jobs to Generation Park, joining Eli Lilly in Houston's booming life sciences hub.

Davie Defense Shipbuilding (Galveston/Port Arthur) - \$1.0B

This expansion for building Arctic icebreakers is a massive boost for the regional maritime industry. It is projected to create 2,400 new jobs, providing a significant economic lift to the coastal counties of the Houston MSA.

NRG Electric Power Generation Plant (Harris County) - \$617M

Designated under the Texas JETI (Jobs, Energy, Technology & Innovation) program, this 455-megawatt natural gas facility is a critical infrastructure win. It directly addresses regional grid reliability and energy demand for the growing Houston population.

Nvidia/Foxconn AI Supercomputer Factory (Harris County) - \$450M

Foxconn is investing \$450 million to establish a 1M SF advanced manufacturing facility for Nvidia AI supercomputers. The highly automated robotic plant is projected to create 600 direct jobs, positioning Houston as a major hub for high-tech AI infrastructure.

Apple Advanced Manufacturing Campus (Harris County) - Footprint Expanded to 500K SF

Apple is doubling its Houston footprint to bring Mac mini assembly to the U.S. for the first time, alongside an expansion of its active Apple Intelligence AI server production line. The development is projected

to create thousands of regional jobs and includes a new 20K SF Advanced Manufacturing Center for local workforce training.

Applied Optoelectronics Inc. (Sugar Land) - \$150M to \$300M

AOI is expanding its optical transceiver manufacturing and data center operations. This project will create 500 jobs and strengthens the "Silicon Bayou" tech corridor, supporting the global demand for AI and high-speed data infrastructure.

ExxonMobil Redomicile to Texas

While Exxon was already operationally headquartered in Spring, the formal legal redomicile to Texas (moving from New Jersey) is a major symbolic and legal victory for the Houston MSA. It cements the world's largest energy company's long-term commitment to the region's business and legal ecosystem.



Houston Manufacturing Overview

MANUFACTURING WORKERS (MAY 2026)

239.0K+

MANUFACTURING BUSINESSES

10.5K+

MANUFACTURING % OF TOTAL NONFARM WORKERS

6.8%

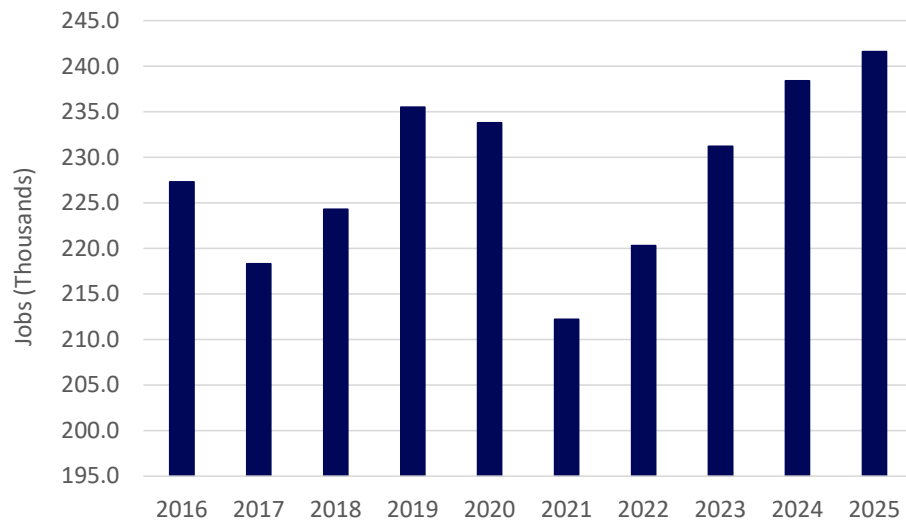
CAPITAL INVESTMENT

\$9.0B+

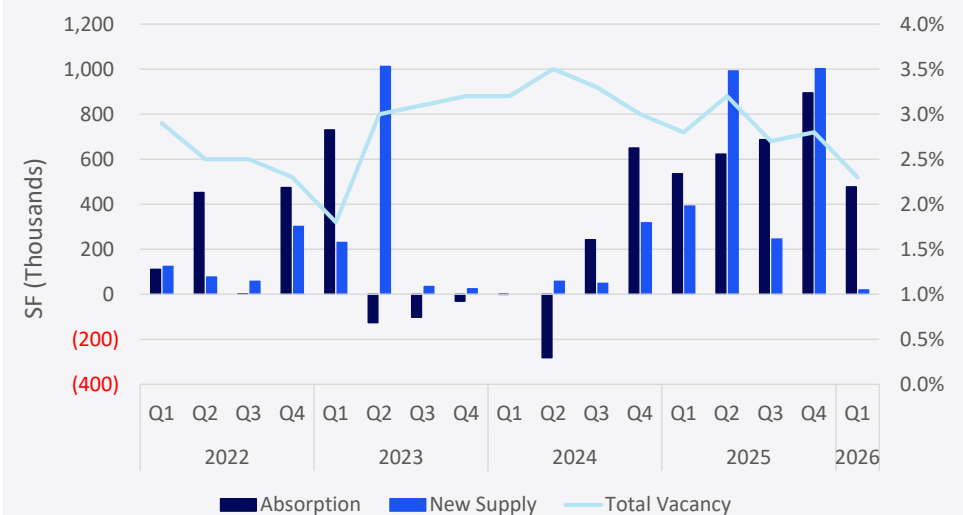
HIGHLIGHTS

- Driven by rising re-shoring and on-shoring demand, the Houston industrial market delivered 3.1M SF of manufacturing space over the last 24 months—marking one of the highest two-year supply increases in nearly eight years.
- The construction pipeline remains elevated at 1.3M SF—18.8% above its five-year quarterly average. Furthermore, 69% of all space currently underway is already pre-leased.
- The average annual salary for all manufacturing jobs (general manufacturing and production, advanced manufacturing, and manufacturing engineering) in Houston is \$100,178.
- Houston's manufacturing vacancy rate is just 2.3%—well below the market's overall industrial vacancy of 7.5%.

HOUSTON MANUFACTURING JOBS



MANUFACTURING MARKET FUNDAMENTALS



Key Manufacturing Activity (last 24 months)

Leasing activity, move-ins and owner-user acquisitions for manufacturing facilities, segmented by square footage.



INDUSTRY



Tech, R&D,
Data Center



Manufacturing,
Fabrication & Materials
Processing



Vehicles, Aviation, Tires,
& Auto Parts

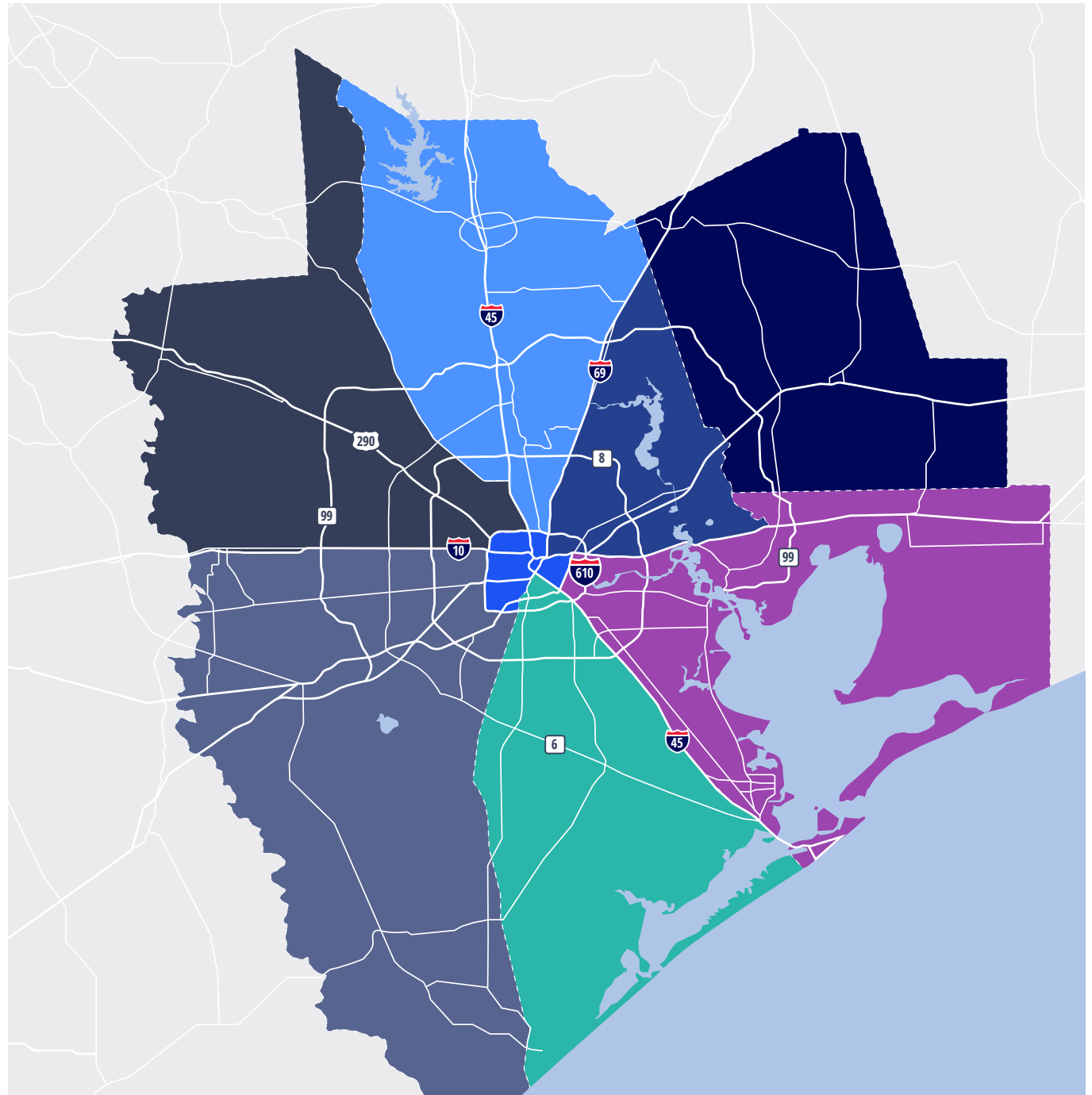


Building Materials,
Construction, Power
Equipment, & HVAC

Submarket Map

SUBMARKET CLUSTER NAME

- 1 Inner Loop Corridor
- 2 Liberty County
- 3 North Corridor
- 4 Northeast Corridor
- 5 Northwest Corridor
- 6 South Corridor
- 7 Southeast Corridor
- 8 Southwest Corridor



Global Stats

Colliers (NASDAQ, TSX: CIGI) is a global diversified professional services and investment management company. Operating through three industry-leading platforms – Real Estate Services, Engineering, and Investment Management – we have a proven business model, an enterprising culture, and a unique partnership philosophy that drives growth and value creation. For 30 years, Colliers has consistently delivered approximately 20% compound annual returns for shareholders, fueled by visionary leadership, significant inside ownership and substantial recurring earnings. With more than \$5.6 billion in annual revenues, a team of 24,000 professionals, and more than \$108 billion in assets under management, Colliers remains committed to accelerating the success of our clients, investors, and people worldwide. Learn more at corporate.colliers.com, X @Colliers or LinkedIn.

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Disclaimer

Colliers' statistical tracked set for Houston includes all single- and multi-tenant industrial properties above 20,000 square feet. Heavy-manufacturing and data-center facilities are excluded from the total tracked inventory. Our database is updated daily along with some historical revisions, making comparisons with prior published reports challenging.

Sources

Colliers | CoStar | Lightcast | Esri



\$5.6B

ANNUAL
REVENUE

70

COUNTRIES WE
OPERATE IN

\$108B

ASSETS UNDER
MANAGEMENT

44,000

LEASE AND SALE
TRANSACTIONS

2B

SQUARE FEET
MANAGED

24,000

PROFESSIONALS

Number of countries includes affiliates

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