



TIBER CREEK GROUP



STATE OF PLAY: *PRIMARIES*

239 DAYS UNTIL NOVEMBER 3, 2026

ELECTION SEASON OFFICIALLY BEGINS

On March 3, Texas, Arkansas, and North Carolina kicked off the 2026 election season with the first round of statewide primaries. In Texas, voters cast ballots in high-profile primaries for governor, U.S. Senate, and 38 House seats under a newly redrawn congressional map. Arkansas held primaries for statewide offices and its congressional delegation – delivering predictable results in a safe Republican state. North Carolina, also operating under new congressional maps, continues to serve as a key battleground, with competitive races expected to shape the broader midterm landscape.

35 Senate seats and all 435 House seats will be on the ballot in November.

WHAT WE'RE WATCHING

TEXAS

HOUSE

TX-02: Republican State Rep. Steve Toth defeated Rep. Dan Crenshaw in a safe Republican seat.

TX-18: Democratic Reps. Christian Menefee and Al Green will compete in a runoff for the nomination in the newly drawn, solidly blue, 18th District.

TX-23: Republican Rep. Tony Gonzales ended his reelection campaign after being forced into a runoff in the Republican primary and amid a House Ethics review. State Rep. Brandon Herrera will be the Republican nominee for TX-23.

TX-33: Rep. Julie Johnson (D) and former Rep. Colin Allred (D) will advance to a runoff. The new 33rd District is a safe Democrat seat.

SENATE

REPUBLICAN NOMINEE

Sen. John Cornyn and Attorney General Ken Paxton will advance to a May 26 runoff for the Republican Senate nomination.

President Trump stated on Truth Social he would soon make an endorsement in the race with the expectation the candidate he does not endorse would drop out.

DEMOCRATIC NOMINEE

State Rep. James Talarico defeated Congresswoman Jasmine Crockett for the Democratic Senate nomination.



Current House Delegation:

25 R – 13 D

**The state's redistricting could allow the GOP to pick up 3-5 seats*



Current House Delegation:

10 R – 4 D

**The state's redistricting could allow the GOP to pick up 1 seat*

North Carolina's 2025 redistricting made NC-01 (Davis) the state's **most competitive swing seat** and a viable GOP target.

Rep. Valerie Foushee (D-04) **narrowly defeated** young challenger Nida Allam in the Democratic primary, with Allam conceding late Wednesday night after falling short of just 1,202 votes.

Former Governor Roy Cooper (D) will face former RNC Chair Michael Whatley (R) in November for North Carolina's U.S. Senate seat. The competitive state is viewed as a **key pickup opportunity** for Democrats in the 2026 cycle.

NORTH CAROLINA