



2025 Fall Legislative Outlook

Prepared by KDCR Partners



2025 Fall Outlook

With so many issues at stake and an unprecedented amount of political noise, the KDCR Partners team is here to help you cut through the commotion and track the key issues shaping the policy agenda this fall and beyond.

Key Stats from the 119th Congress

- 38 of the bills passed in the 119th Congress have been [signed](#) into law, including 16 Congressional Review Acts (CRAs) overturning Biden-era federal rules.
- For the first time since 2018, the Senate passed three FY26 appropriations bills before August recess—Military Construction-Veterans Affairs, Agriculture-FDA, and Legislative Branch. The House passed two FY26 appropriations bills—Defense and Military Construction-Veterans Affairs.

Congress Agenda

- Congress returned on November 12, 2025, after the longest government shutdown in U.S. history
- House and Senate leadership and appropriators are working on a path forward for the January 30, 2026, government funding deadline.
- Senate Majority Leader John Thune (R-SD) committed to a Senate vote on ACA subsidies sometime in December 2025.
- Other possible priorities:
 - Disaster supplemental appropriations
 - [Extenders](#)
 - Reforms to the confirmation process to prioritize [confirming](#) more than 140 outstanding Trump nominees, including more than 30 ambassadors.

Trump Admin

- Continued focus on implementation of the One Big Beautiful Bill Act (OBBBA) (Public Law 119-21) and various [executive orders](#).
- Ongoing negotiations with trading partners.

What We're Watching

- Release of the MAHA Commission's strategy document
- Release of the 2025–2030 Dietary Guidelines for Americans
- Farm Bill extension
- Implementation of SNAP provisions from OBBBA

Ag & Nutrition



- Potential for permitting reform
- Fate of Energy and Water Development Appropriations
- Expiring programs and provisions, including requirements under EO [14270](#), "Zero-Based Regulatory Budgeting to Unleash American Energy"
- Pending nominations

Energy & Environment



- Fate of various extenders, including Medicare Telehealth Services Extension, National Health Security Extensions, Over-the-Counter Monograph Drug User Fee Program (OMUFA), & additional public health policies
- Potential end-of-year health package
- Statutory Paygo
- Implementation of ACA, Medicare, and Medicaid provisions from OBBBA
- President Trump's drug-pricing agenda

Health



- Implementation of tax policies from OBBBA
- Interest in reconciliation 2.0
- Policies for potential end-of-year tax package
- International tax agenda

Tax



- Privacy & online safety
- AI
- Universal Service Fund & NTIA's revamp of the BEAD program
- Reauthorization of the Cybersecurity Information Sharing Act of 2015

Tech



- Country-by-country negotiations
- Sector-specific trade policy
- Court rulings on presidential scope of authority under IEEPA

Trade and Tariffs



- Surface transportation reauthorization
- Fate of FY26 THUD Appropriations
- Pipeline and Hazardous Materials Safety Administration (PHMSA) reauthorization
- Pending DOT nominees

Transportation



As of September 2, 2025



Key Dates

SEPT. 30

▷ **END OF FISCAL YEAR 2025**

▷ Expiration of various programs, including: EV Tax Credits, Medicare, Medicaid, and other healthcare extenders, National Flood Insurance Program Authorization, some Farm Bill provisions.

OCT. 1

FISCAL YEAR 2026 BEGINS
Reconciliation 2.0 Window

OCT. 3

▷ **SEPTEMBER JOBS REPORT**

OCT. 20

▷ **DEADLINE FOR FEDERAL AGENCIES TO UPDATE AI POLICIES PER OMB GUIDANCE**

OCT. 28-29

FEDERAL RESERVE BOARD MEETINGS

NOV. 4

▷ **NEW JERSEY AND VIRGINIA STATE ELECTIONS**

NOV. 7

▷ **OCTOBER JOBS REPORT**

NOV. 10

▷ **CHINA TARIFF PAUSE ENDS**

DEC. 5

NOVEMBER JOBS REPORT

DEC. 9-10

FEDERAL RESERVE BOARD MEETINGS

DEC. 31

ENHANCED ACA SUBSIDIES AND CERTAIN IRA ENERGY EFFICIENCY CREDITS EXPIRE.

DEC. 31

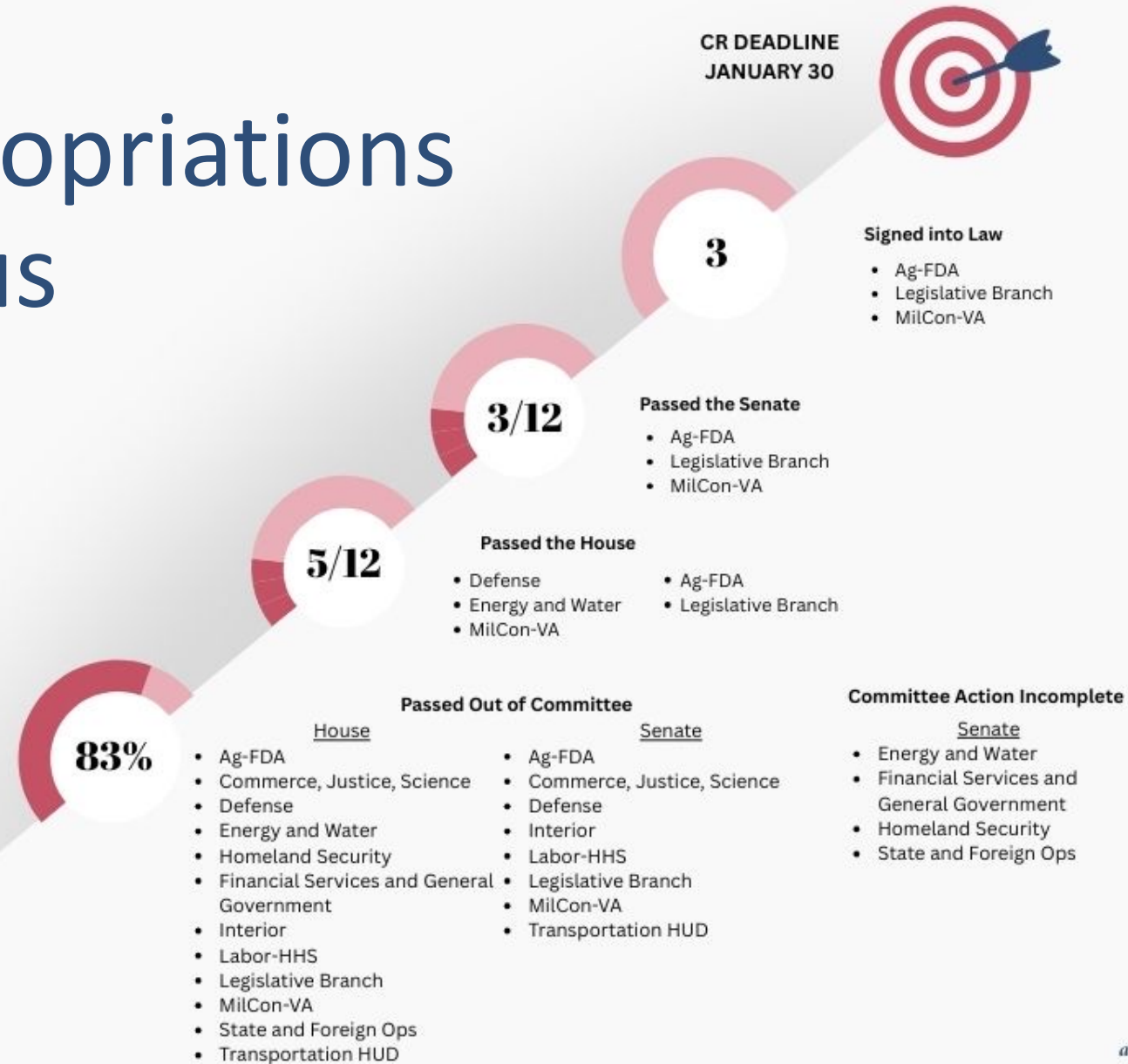
2025-2030 DIETARY GUIDELINES FOR AMERICANS DUE

JAN. 2026

PAYGO SEQUESTER WOULD TAKE EFFECT

as of September 24, 2025

FY26 Appropriations Status



as of December 3, 2025

2026 Primary Calendar

03 March

Mar. 3	Arkansas *3/31 North Carolina *5/12 Texas *5/16
Mar. 10	Mississippi *4/7
Mar. 17	Illinois

04 April

Apr. 18	Louisiana *5/30
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05 May

May 5	Indiana Ohio
May 15	Nebraska West Virginia
May 19	Georgia Idaho Kentucky Oregon Pennsylvania Alabama *6/26

06 June

Jun. 2	California Iowa Montana New Jersey New Mexico South Dakota *7/28
Jun. 9	Maine Nevada North Dakota South Carolina *6/23
Jun. 16	Oklahoma Virginia
Jun. 23	Maryland New York Utah
Jun. 30	Colorado

Special Elections		
TX-18		General: Nov. 4 Runoff: Jan. 31, 2026

08 August

Aug. 4	Arizona Kansas Michigan Missouri Washington
Aug. 6	Tennessee
Aug. 8	Hawaii
Aug. 11	Connecticut Minnesota Vermont Wisconsin
Aug. 18	Alaska Florida Wyoming

09 September

Sept. 8	New Hampshire Rhode Island
Sept. 15	Delaware Massachusetts

* Runoff dates
As of December 3, 2025

Redistricting Watch

Texas



TX Target Districts

9	Rep. Al Green (D)
28	Rep. Henry Cuellar (D)
32	Rep. Julie Johnson (D)
34	Rep. Vincente Gonzalez (D)
35	Rep. Greg Casar (D)

California



100% of KDCR's lobbyists expect redistricting efforts in various states to move forward, with a narrow majority thinking Republicans are most likely to gain favorable seats.

CA Target Districts

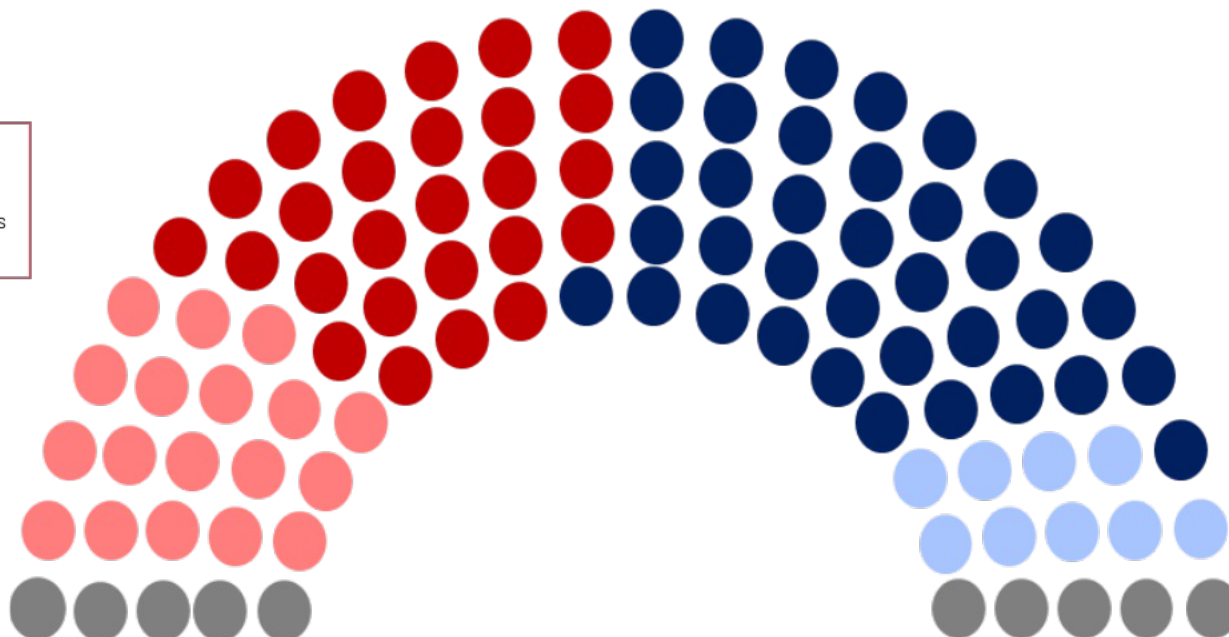
1	Rep. Doug LaMalfa (R)
3	Rep. Kevin Kiley (R)
22	Rep. David Valadao (R)
41	Rep. Ken Calvert (R)
48	Rep. Darrell Issa (R)

Changing Landscape 2026

Senate (53-47[#])



KDCR's Republican lobbyists expect Republicans to maintain their margins in the Senate. KDCR's Democratic lobbyists think net gains for Democrats could be made.



Senators Whose Terms End Jan. 2026

● Republicans (22)

- Shelley Moore Capito (R-WV)
- Bill Cassidy (R-LA)
- Susan Collins (R-ME)
- John Cornyn (R-TX)
- Tom Cotton (R-AR)
- Steve Daines (R-MT)
- Joni Ernst (R-IA)
- Lindsey Graham (R-SC)
- Bill Hagerty (R-TN)
- Cindy Hyde-Smith (R-MS)
- Jon Husted (R-OH)
- Cynthia Lummis (R-WY)
- Roger Marshall (R-KS)
- Mitch McConnell (R-KY)
- Ashley Moody (R-FL)
- Markwayne Mullin (R-OK)
- Pete Ricketts (R-NE)
- Jim Risch (R-ID)
- Mike Rounds (R-SD)
- Dan Sullivan (R-AK)
- Thom Tillis (R-NC)
- Tommy Tuberville (R-AL)*

● Democrats (13)

- Cory Booker (D-NJ)
- Chris Coons (D-DE)
- Dick Durbin (D-IL)
- John Hickenlooper (D-CO)
- Ben Ray Lujan (D-NM)
- Ed Markey (D-MA)
- Jeff Merkley (D-OR)
- Jon Ossoff (D-GA)
- Gary Peters (D-MI)
- Jack Reed (D-RI)
- Jeanne Shaheen (D-NH)
- Tina Smith (D-MN)
- Mark Warner (D-VA)

● Incumbents Retiring or Not Running for Re-election (5R, 5D)

- Marsha Blackburn (R-TN)*
- Joni Ernst (R-IA)
- Mitch McConnell (R-KY)
- Thom Tillis (R-NC)
- Tommy Tuberville (R-AL)*
- Michael Bennet (D-CO)*
- Dick Durbin (D-IL)
- Gary Peters (D-MI)
- Jeanne Shaheen (D-NH)
- Tina Smith (D-MN)

Includes two Independents who caucus with Democrats

* Running for governor

As of November 24, 2025

Changing Landscape 2026

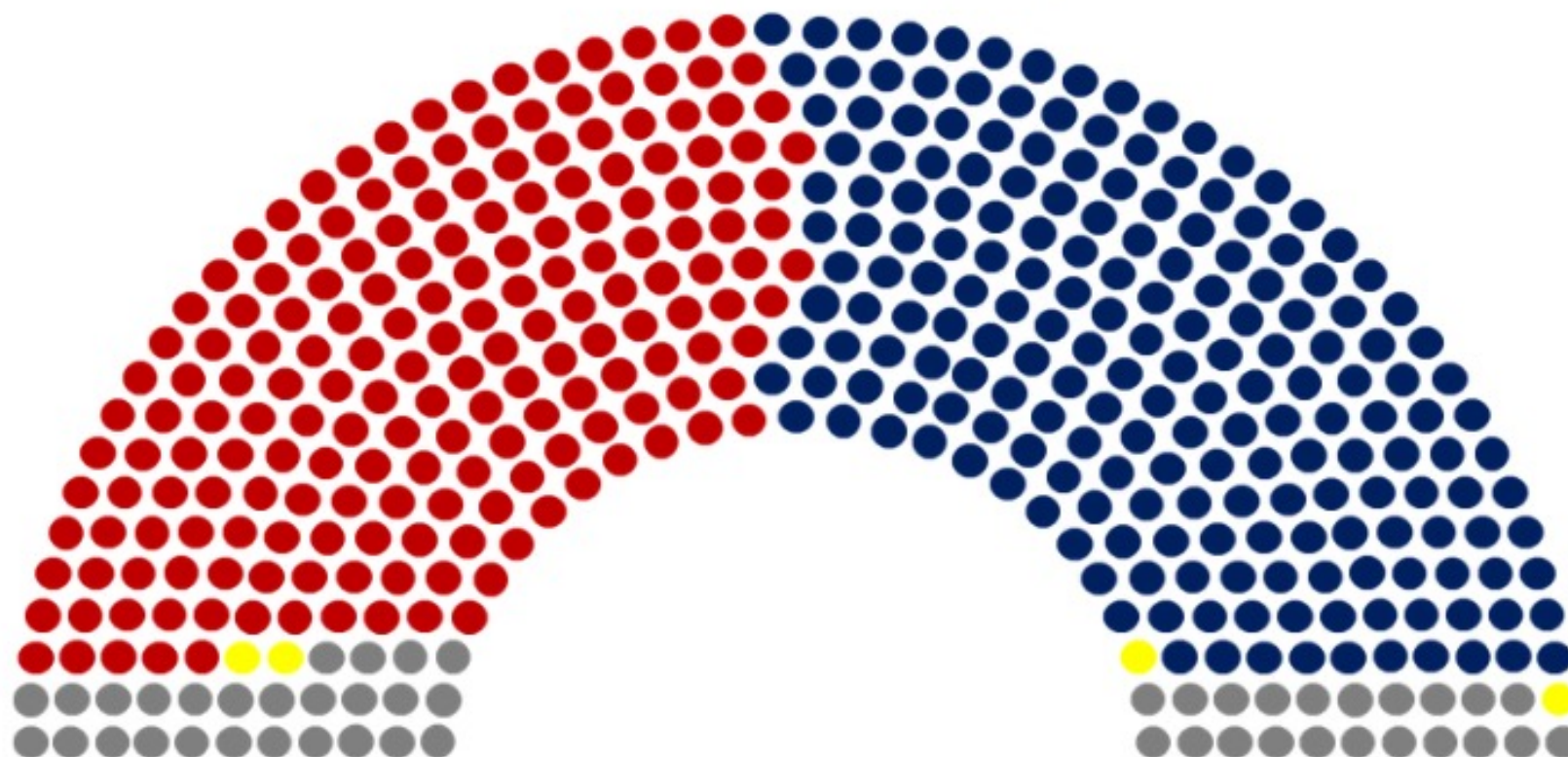
House (218-213, 4V)

● Vacant (2R,2D)
 *Running for governor
 +Running for U.S. Senate
 ^Running for TX attorney general

As of January 12, 2026



KDCR's Democratic lobbyists expect control of the House to flip. KDCR's Republican lobbyists respectfully disagree.



● Incumbents Retiring or Not Running for Re-election

Republicans (26)

- Jodey Arrington (R-TX)
- Don Bacon (R-NE)
- Andy Barr (R-KY)[†]
- Andy Biggs (R-AZ)*
- Buddy Carter (R-GA)[†]
- Mike Collins (R-GA)[†]
- Byron Donalds (R-FL)[†]
- Randy Feenstra (R-IA)*
- Marjorie Taylor Greene (R-GA)
- Harriet Hageman (R-WY)[†]
- Ashley Hinson (R-IA)[†]
- Wesley Hunt (R-TX)[†]
- John James (R-MI)*
- Dusty Johnson (R-SD)*
- Morgan Luttrell (R-TX)
- Nancy Mace (R-SC)*
- Michael McCaul (R-TX)
- Barry Moore (R-AL)[†]
- Troy E. Nehls (R-TX)
- Dan Newhouse (R-WA)
- Ralph Norman (R-SC)*
- John Rose (R-TN)*
- Chip Roy (R-TX)^
- David Schweikert (R-AZ)*
- Elise Stefanik (R-NY)*
- Tom Tiffany (R-WI)*

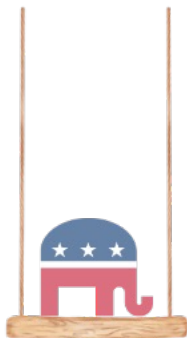
Democrats (22)

- Julia Brownley (D-CA)
- Angie Craig (D-MN)[†]
- Jasmine Crockett (D-TX)[†]
- Danny Davis (D-IL)
- Lloyd Doggett (D-TX)
- Dwight Evans (D-PA)
- Chuy García (D-IL)
- Jared Golden (D-ME)
- Steny Hoyer (D-MD)
- Robin Kelly (D-IL)[†]
- Raja Krishnamoorthi (D-IL)[†]
- Seth Moulton (D-MA)[†]
- Jerry Nadler (D-NY)
- Chris Pappas (D-NH)[†]
- Nancy Pelosi (D-CA)
- Jan Schakowsky (D-IL)
- Mikie Sherrill (D-NJ)*
- Haley Stevens (D-MI)[†]
- Eric Swalwell (D-CA)*
- Marc Veasey (D-TX)
- Nydia Velázquez (D-NY)
- Bonnie Watson Coleman (D-NJ)

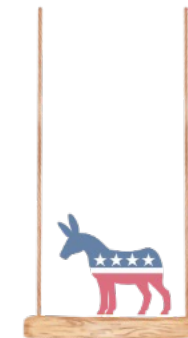
Special Elections Deep Dive

VACANCY	FAVORED PARTY	SPECIAL ELECTION DATE	HOUSE VOTING MARGIN IF FAVORED CANDIDATE WINS
Marjorie Taylor Greene (R-GA-14)	Republicans	March 10, 2026 (primary) April 7, 2026 (runoff)	219-214 (one-vote margin)
Mikie Sherrill (D-NJ-11)	Democrats	February 5, 2026 (primary) April 16, 2026 (general)	219-215 (one vote margin)
Doug LaMalfa (R-CA-01)	Republicans	June 2, 2026 (general) August 4, 2026 (runoff)	220-215 (one-vote margin)

As of February 2, 2026



2026 “Swingiest” Districts



Republicans in Districts Won by Harris in 2024

- | House | Senate |
|--|--|
| <ul style="list-style-type: none"> • Open Seat (NE-2) • Michael Lawler (NY-17) | <ul style="list-style-type: none"> • Susan Collins (ME) |

Democrats in Districts Won by Trump in 2024

- | House | Senate |
|---|---|
| <ul style="list-style-type: none"> • Josh Harder (CA-9) • Adam Gray (CA-13) • Jared Golden (ME-2) • Kristen McDonald Rivet (MI-8) • Don Davis (NC-1) • Nellie Pou (NJ-9) • Gabriel Vasquez (NM-2) • Susie Lee (NV-3) • Tom Suozzi (NY-3) • Marcy Kaptur (OH-9) • Henry Cuellar (TX-28) • Vicente Gonzalez (TX-34) • Marie Perez (WA-3) | <ul style="list-style-type: none"> • Jon Ossoff (GA) • Open Seat (MI) |

Fast Facts



6% of House Democrats are running in districts Trump won in 2024.



Less than 1% of House Republicans are running in districts Harris won in 2024.



Only one Senate Republican is running in a state that Harris won in 2024—Susan Collins (R-ME).



Only two contested seats held by Senate Democrats are in states Trump won in 2024—Georgia and Michigan.



Thank You

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