

Key Takeaways

Employment

- In June 2025, El Paso's non-farm employment in El Paso and Las Cruces increased by 3,500 jobs (1.0%) and Las Cruces's 1,600 jobs (2.0%), respectively, compared to June 2024 on a Year-over-Year (YoY) basis.
- In June 2025, the manufacturing sector in Las Cruces had YoY growth of 100 jobs (2.3%). Meanwhile, Ciudad Juárez experienced a loss of 9,800 jobs (-3.1%) within this sector, and manufacturing employment was stagnant in El Paso.

Trade

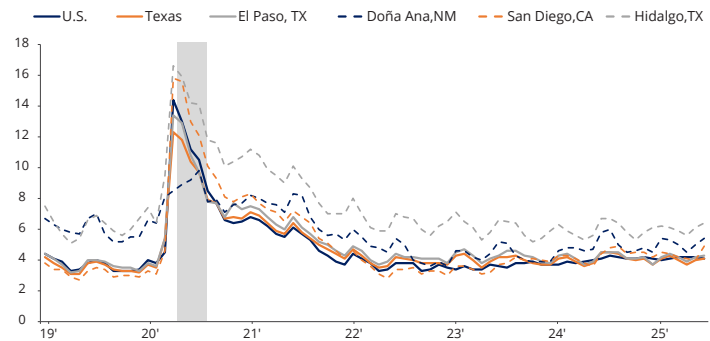
- From January to June 2025, total trade through the top ten Ports of Entry (PoEs) along the U.S.-Mexico border rose by \$22,124 million (6.2%) compared to the same period in 2024. Ysleta and Laredo PoEs recorded increases of \$12,542 million (30.5%) and \$9,655 million (5.8%), respectively, while the Bridge of the Americas (BOTA) PoE posted a notable rise of \$2,723 million (24.5%).¹
- During January-June 2025, the top six PoEs recorded an overall \$20,459 million (10.4%) increase in total commodity import value compared to the same period in 2024. Notably, in June 2025, BOTA PoE recorded a \$109 million (9.5%) decline in exports compared to June 2024.²

Hotel Occupancy Rate

- Hotel occupancy rates in June 2025 decreased YoY in four of the six selected Metropolitan Statistical Areas (MSAs) compared to June 2024. Only Ciudad Juárez and Laredo experienced growth, with rates of 5.0% and 4.0%, respectively.
- June 2025 was the only month where a month-over-month (MoM) increase was reported across all MSAs, with the exception of Las Cruces, which remained unchanged during the second quarter of 2025. El Paso observed the greatest growth, with an increase of 10.6%, likely driven by Coldplay's "Music of the Spheres" tour, which took place at a pair of sold-out shows on June 13 and 14.

Quick-Glance Indicators

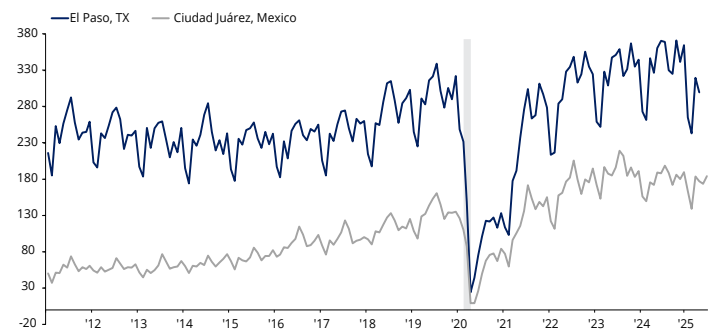
Unemployment Rates for U.S., State, and Selected MSA Economies



Note: Data as of June 2025. The shaded area indicates recession as defined by the National Bureau of Economic Research (2020 recession began in February and ended in April).

Source: Hunt Institute calculations using data from the U.S. Bureau of Labor Statistics.

El Paso and Ciudad Juárez Air Passengers, Thousands



Note: Data as of June 2025. Shaded area indicates recession as defined by the National Bureau of Economic Research (2020 recession began in February and ended in April).

Source: Hunt Institute using El Paso International Airport and Grupo OMA data.

Employment

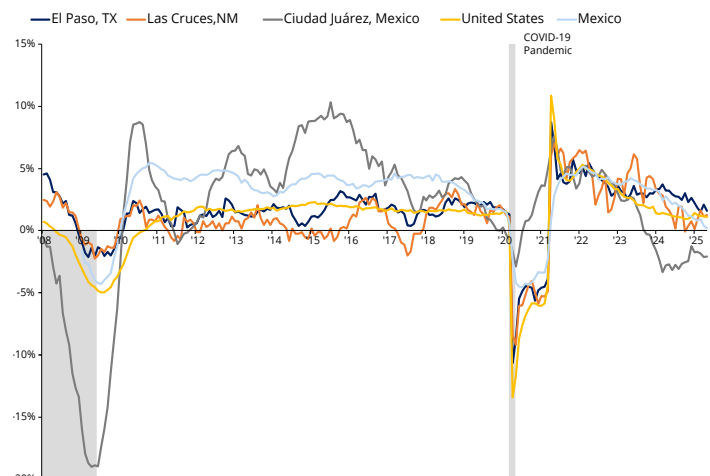
Slow Growth in the Non-farm

Employment in the Region

Non-farm employment shows slow growth in El Paso and Las Cruces between June 2024 and June 2025, while Ciudad Juárez continued to show experience significant YoY non-farm employment losses.

Nationally, the U.S. added 1,571,000 non-farm jobs (1.0%) on a YoY basis in June 2025, while Mexico added 22,400 jobs (0.1%). During the same period, El Paso and Las Cruces experienced YoY gains of 3,500 jobs (1.0%) and 1,600 jobs (2.0%), respectively. Meanwhile, Ciudad Juárez reported a loss of 7,800 jobs (-1.6%), marking the 21st consecutive month of overall YoY non-farm job losses. These losses are primarily driven by a decline in the city's manufacturing sector, which lost approximately 9,800 jobs (-3.1%) during this period.

Paso del Norte Total Non-Farm Employment (Year-over-Year, %)



Note: Preliminary data for June 2025. Shaded areas indicate recession as defined by the National Bureau of Economic Research (The 2008 recession began in late 2007 and lasted until mid-2009, 2020 recession began in February and ended in June).

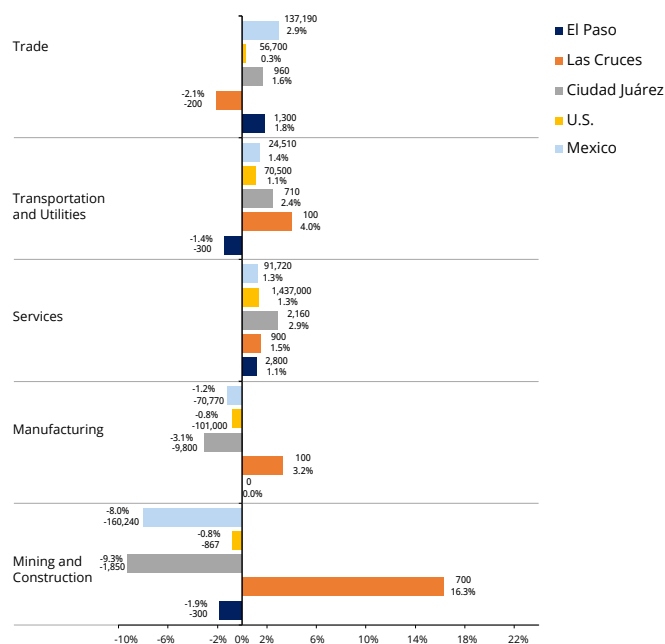
Source: Hunt Institute calculations using data from the U.S. Bureau of Labor Statistics and Instituto Mexicano del Seguro Social.

¹ The top ten U.S.-Mexico border Ports of Entry (PoEs) include Laredo, TX; Ysleta, TX; Otay Mesa, CA; Hidalgo, TX; Eagle Pass, TX; Nogales, AZ; Santa Teresa, NM; Brownsville, TX; Calexico East, CA; and The Bridge of the Americas (BOTA), TX.

² The top six U.S.-Mexico border Ports of Entry (PoEs) include Laredo, TX; BOTA+Ysleta, TX; Otay Mesa, CA; Hidalgo, TX; Eagle Pass, TX; and Nogales, AZ.

A local branch of the business organization COPARMEX warns of a loss of economic competitiveness in Ciudad Juárez; Reasons given were political uncertainty, an increase in the minimum wage, a decrease in working hours, and high energy prices.³

Paso del Norte Total Non-Farm Employment by Sector, November 2024 (Year-over-Year)



Note: Preliminary data for June 2025. Services excludes Transportation and Utilities, and Trade.

Source: Hunt Institute calculations using data from the U.S. Bureau of Labor Statistics and Instituto Mexicano del Seguro Social.

The Hunt Institute tracks five non-farm employment sectors in the Paso del Norte region. In El Paso, the following sectors experienced employment growth on a YoY basis from June 2024 to June 2025: services grew by 2,800 jobs (1.1%) and trade by 1,300 jobs (1.8%), while manufacturing remained unchanged (0.0%), the transportation, warehousing, and utilities sector lost 300 jobs (-1.4%), and mining and construction lost 300 jobs (-1.9%). Las Cruces registered growth in four out of the five sectors: services by 900 jobs (1.5%), mining and construction by 700 jobs (16.3%), manufacturing by 100 jobs (3.2%), and the transportation sector by 100 jobs (4.0%), while the trade sector lost 200 jobs (-2.1%).

Trade

U.S.-Mexico Border Trade Sees Strong Gains in Early 2025

From January to June 2025, total trade and commodity imports and exports across the top U.S.-Mexico border Ports of Entry (PoEs) exceeded the levels recorded in the same period in 2024.

Total trade along the U.S.-Mexico border at the top ten PoEs increased by \$22,124 million (6.2%) from January to June 2025 compared to the same period in 2024. The PoEs that experienced the largest growth were Ysleta, Laredo, and the Bridge of the Americas (BOTA) with increases in total trade of \$12,542 million (30.5%), \$9,655 million (5.8%), and \$2,723 million (24.5%), respectively.

Ysleta, Calexico-East, Brownsville, and Santa Teresa were the only PoEs to experience month-over-month (MoM) increases in total trade from May 2025 to June 2025. On a year-over-year (YoY) basis in June 2025 compared to June 2024, Ysleta PoE led with a 35.4% rise.

Top Ten U.S.-Mexico Border Ports of Entry for Total Trade with World, USD Million

Port of Entry	A Jan-June 2024	B Jan-June 2025	B-A	B-A (Δ%)	June 2025	
					MoM	YoY
Laredo, TX (Port)	\$166,252	\$175,907	\$9,655	5.8%	-2.1%	7.5%
Ysleta, TX (Port)	\$41,119	\$53,661	\$12,542	30.5%	9.4%	35.4%
Otay Mesa, CA (Port)	\$31,497	\$31,607	\$110	0.3%	-2.8%	-6.4%
Hidalgo, TX (Port)	\$23,450	\$22,989	\$ (461)	-2.0%	-4.2%	2.1%
Eagle Pass, TX (Port)	\$22,489	\$21,720	\$ (770)	-3.4%	-0.2%	4.8%
Nogales, AZ (Port)	\$18,907	\$18,508	\$ (399)	-2.1%	-6.1%	1.3%
Santa Teresa, NM (Port)	\$18,328	\$17,529	\$ (799)	-4.4%	1.0%	-29.5%
BOTA, TX (Port)	\$11,105	\$13,828	\$2,723	24.5%	-23.7%	12.3%
Brownsville, TX (Port)	\$11,465	\$11,814	\$349	3.0%	2.0%	8.2%
Calexico-East (Port)	\$11,560	\$10,735	\$ (825)	-7.1%	3.3%	-0.1%

Note: Top ten as of June 2025. YoY denotes year-over-year; MoM denotes month-over-month.

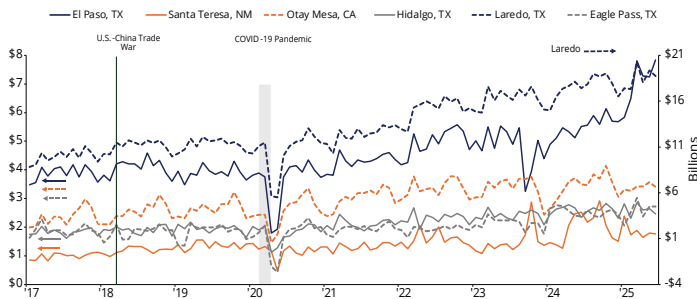
Source: Hunt Institute calculations using data from the U.S. Census Bureau

From January to June 2025, the top six PoEs recorded a total commodity import value of \$218,076 million, a \$20,459 million (10.4%) increase compared to the same period in 2024. In June 2025, Ysleta's imports surged by \$1,980 million (40.9%) compared to June 2024, making it the second-highest YoY percentage growth rate.

The same six PoEs recorded \$120,132 million in exports, a \$2,940 million (2.5%) YoY increase from January to June 2025 compared to the same period in 2024. In June 2025, the only PoEs to register export growth compared to the same period in 2024 were Laredo, Ysleta, Brownsville, and Nogales with increases of \$714.8 million (6.9%), \$561.4 million (24%), \$96.2 million (9.7%), and \$31 million (3.6%), respectively, while BOTA recorded a decline of \$109 million (-9.5%).

³ Carlos Omar Barranco. "Preocupa en sector privado fuga de empresas por pérdida de competitividad". El Norte Digital (Ciudad Juárez, México), July 24, 2025. <https://nortedigital.mx/preocupa-en-sector-privado-fuga-de-empresas-por-perdida-de-competitividad>

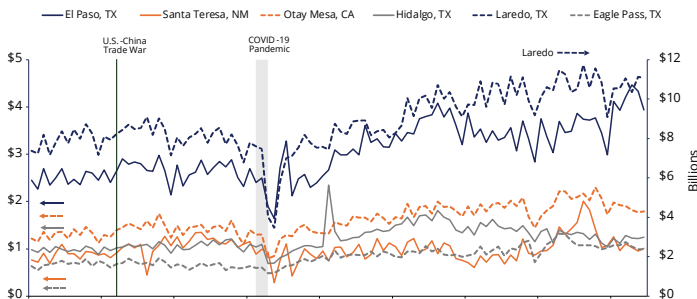
Top U.S.-Mexico Border PoE for Imports from the World, USD Billion (Year-over-Year, %)



Note: Data as of June 2025. Top six ports in total trade. El Paso consists of the Bridge of the Americas (BOTA) and the Ysleta ports of entry. Shaded area indicates recession as defined by the National Bureau of Economic Research (2020 recession began in February and ended in April).

Source: Hunt Institute calculations using data from the U.S. Census Bureau.

Top U.S.-Mexico Border PoE for Exports to the World, USD Billion (Year-over-Year, %)



Note: Data as of June 2025. Top six ports in total trade. El Paso consists of the Bridge of the Americas (BOTA) and the Ysleta ports of entry. Shaded area indicates recession as defined by the National Bureau of Economic Research (2020 recession began in February and ended in April).

Source: Hunt Institute calculations using data from the U.S. Census Bureau.

Hotel Occupancy Rate

Hotel Occupancy Rates Continue to Decline

Hotel occupancy rates in June 2025 showed a YoY decrease in four of the six selected Metropolitan Statistical Areas (MSAs) compared to the same month in 2024.⁴

U.S. hotel occupancy rates have declined for the fourth consecutive month, with a 1.7% YoY decrease in June, according to STR. STR noted that "Since Memorial Day, with one exception, weekdays have consistently underperformed relative to weekends, indicating a continued weak business travel environment."⁵

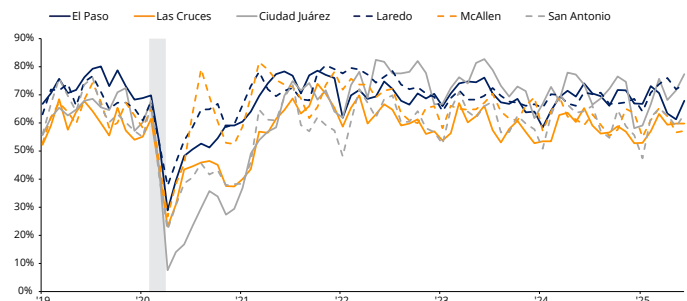
In June 2025, Ciudad Juárez and Laredo were the only MSAs among the selected cities to register a YoY increase in hotel occupancy rates, with an average growth rate of 4.5%. Alternatively, El Paso,

Las Cruces, McAllen, and San Antonio experienced a YoY decrease in hotel occupancy rates, with the average rate declining by 4.4% in June 2025.

During the same period of 2025, Ciudad Juárez and Laredo recorded the highest hotel occupancy rates, with 77.1% and 73.5%, respectively. Conversely, McAllen had the lowest rate level, at 56.9%.

In the second quarter of 2025, June was the lone month that reported a month-over-month (MoM) increase across all MSAs, except for Las Cruces, which remained unchanged. Notably, El Paso registered the highest MoM growth, with a 10.6% increase, following a 3.2% decrease in May 2025. This growth can likely be attributed to Coldplay's "Music of the Spheres" tour, which took place at a pair of sold-out shows on June 13 and 14. Visit EL Paso noted that "hotel occupancy rose from 24% to 95% on June 13, and 94% on June 13."⁶

Hotel Occupancy Rates by MSA through June 2025 (Year-over-Year, %)



Note: Data as of June 2025. McAllen includes Edinburg and Mission; San Antonio includes New Braunfels. The shaded area indicates NBER NBER-defined recession (2020 recession began in February and ended in April).

Source: Hunt Institute using STR data.

Hunt Institute Highlights What's New and What's Next:



ON THE OTHER SIDE:

Aligning Industry, Investment, and Workforce Across Borders
Moderated by Executive Director, Mayra Maldonado, this panel examines how trade policy, border modernization, and digital infrastructure can strengthen North American competitiveness.

About Hunt Institute for Global Competitiveness

Since 2014, the Hunt Institute for Global Competitiveness at The University of Texas at El Paso has provided economic analysis of the Paso del Norte Region that includes the binational communities of El Paso, Texas; Las Cruces, N.M.; and Ciudad Juárez, Mexico. The mission of the Hunt Institute is to produce high-quality market analysis tools that strengthen regional and binational cross-border social and economic development.

utep.edu/hunt-institute

⁴ The selected MSAs include El Paso, TX; Las Cruces, NM; Ciudad Juárez, CH; Laredo, TX; McAllen, TX; and San Antonio, TX.

⁵ Chris Davis. "STR: June U.S. Hotel Occupancy Down, Corp. Travel Weak." *Business Travel News* by NorthStar (USA), July 22, 2025. <https://www.businesstravelnews.com/Lodging/STR-June-US-Hotel-Occupancy-Down-Corp-Travel-Weak>

⁶ Natassia Paloma. "Coldplay tour reportedly boosts El Paso economy, sends hotel occupancy soaring." *El Paso Times* (El Paso, Texas), June 25, 2025. <https://www.yahoo.com/news/coldplay-tour-reportedly-boosts-el-175112396.html>