

Key Takeaways

Employment

- From December 2024 to December 2025, non-farm employment in Las Cruces increased by 2,000 jobs (2.5%), on a Year-over-Year (YoY) basis. Meanwhile, El Paso remained stagnant (0.0%), and Ciudad Juárez lost 7,868 jobs (-1.6%) during the same period.
- Comparing December 2024 and December 2025, the manufacturing sector lost 12,200 jobs (-4.0%) in Ciudad Juárez and 200 jobs (-1.1%) in El Paso. Meanwhile, manufacturing employment in Las Cruces was stable for the same period.

Loaded Truck Containers

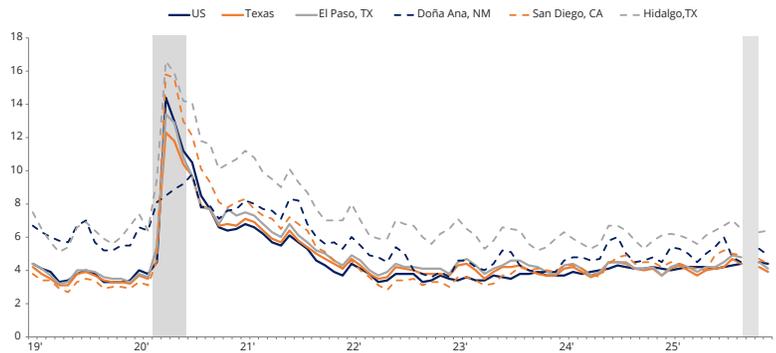
- From January to November 2025, the average value per loaded truck container for the U.S.-Mexico border experienced a notable increase of \$7,221 (20.7%) compared to the same period in 2024.
- The average value per container for the Paso del Norte region reached \$97,868 in the January to November 2025 period. This represents a YoY increase of \$22,730 (30.3%) compared to 2024.
- The Santa Teresa, Ysleta, and Tornillo PoEs were the top three PoEs in terms of the average value per loaded truck containers during this period. The BOTA PoE, meanwhile, was the top eleventh.

Sales Tax Collections

- In 2025, selected cities experienced an overall increase of \$121.2 million (4.5%) in total sales and use tax collections compared to 2024.¹ Houston had the largest increase, rising by \$71.8 million (8.2%).
- El Paso's sales and use tax collection increased by approximately \$5.0 million (3.7%) during 2025 compared with 2024; this growth notably outpaced the \$3.1 million (2.4%) increase seen from 2023 to 2024.

Quick-Glance Indicators

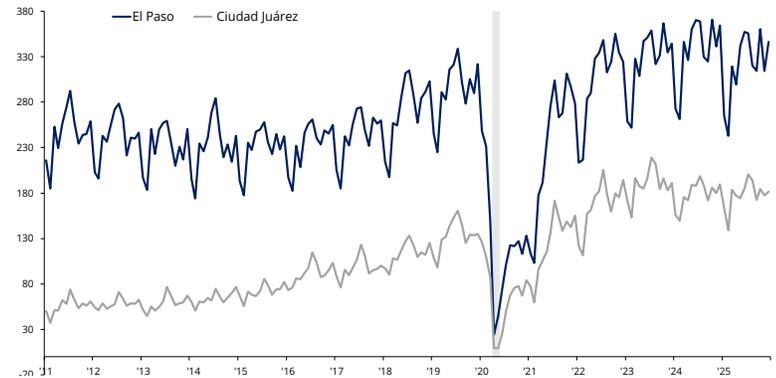
Unemployment Rates for U.S., State, and Selected MSA Economies



Note: Data as of December 2025. The data for October 2025 is unavailable due to the 2025 lapse in appropriations. The shaded area indicates the recession as defined by the National Bureau of Economic Research (the 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 December 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.

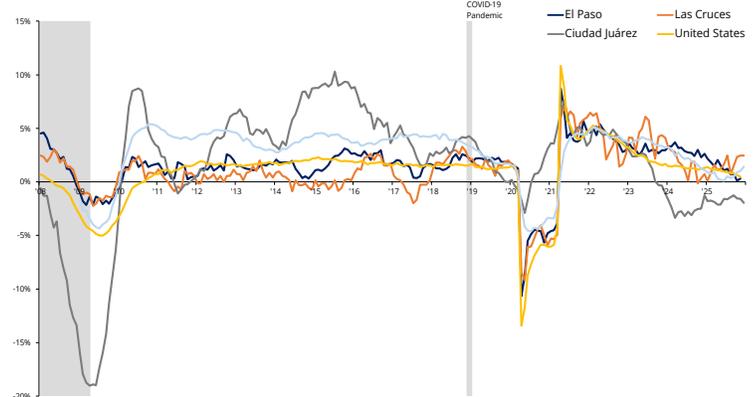
Employment

Slow Employment Growth in the Paso del Norte Region

Non-farm employment increased in El Paso and Las Cruces between December 2024 and December 2025, while Ciudad Juárez experienced YoY losses.

Nationally, the U.S. added 525,000 non-farm jobs (0.4%) in December 2025 on a YoY basis. During the same period, Las Cruces experienced YoY gains of 2,000 jobs (2.5%), while El Paso remained stagnant (0.0%). During the same period, Ciudad Juárez reported a loss of 9,562 jobs (-2.0%), marking

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



Note: Preliminary data for December 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 December).

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

¹ Selected Texas cities refer to the six most populous cities (Houston, San Antonio, Dallas, Austin, Fort Worth, and El Paso) and two border cities (McAllen and Laredo).

the 27th consecutive month of YoY non-farm job losses. These losses are primarily driven by a decline in the city’s manufacturing sector, which lost approximately 12,200 jobs (-4.0%) during this period. Despite losing 65,000 manufacturing jobs since 2023 and facing corporate bankruptcy like First Brands Group, the Juárez maquiladora sector will remain an important employer that is currently undergoing economic and geopolitical adjustments, according to Index Juárez, a local branch of the national manufacturing chamber.²

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 comparing December 2024 to December 2025: trade grew by 1,100 jobs (2.0%) and transportation and warehousing by 200 jobs (0.9%). Meanwhile, services lost 700 jobs (-0.3%), mining and construction lost 400 jobs (-2.5%), and manufacturing lost 200 jobs (-1.1%). Las Cruces registered growth in two out of the five sectors: services by 1,800 jobs (2.9%) and mining and construction by 300 jobs (6.5%). Meanwhile, the transportation and manufacturing sector lost 100 jobs (-3.6%), and the trade and manufacturing sectors remained unchanged (0.0%).

Truck Containers

Average Value per Loaded Truck Container in the Paso del Norte Region Increased

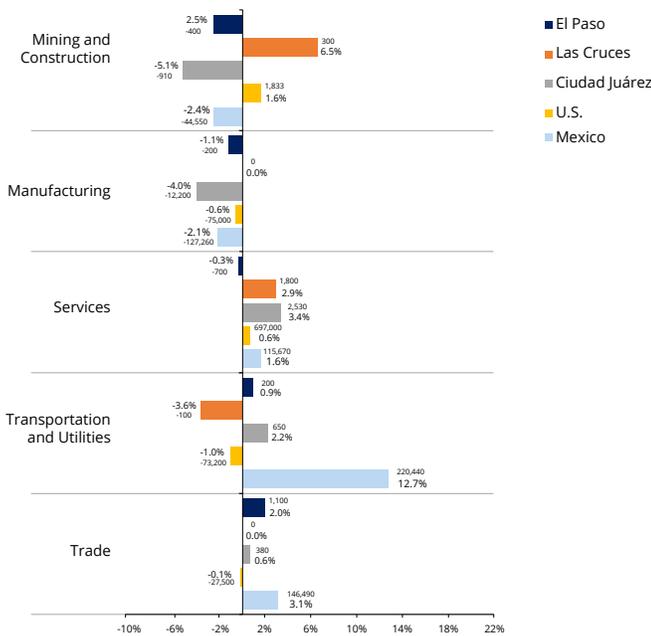
The Paso del Norte Region ports of entry had the highest average value per loaded container truck at the U.S.-Mexico border during the January to November 2025 period.

The Hunt Institute tracks the average value per loaded truck container for all U.S.-Mexico land ports of entry. Between January and November 2025, the average value per container crossing the U.S.-Mexico border reached \$42,093, up by \$7,221 (20.7%) YoY from the same period in 2024.

Between January to November 2025, the loaded truck containers crossing through the Paso del Norte PoEs (ports of entry) had an average value of \$97,868, more than doubling that of the rest of the U.S.-Mexico PoEs. Comparing January to November 2025 to the same period in 2024, the Paso del Norte PoEs’ average truck container value increased by \$22,730 (30.3%). During the same period, three of the four Paso del Norte region PoEs were within the top ten PoEs within the U.S.-Mexico PoEs in terms of average value of loaded truck containers: Santa Teresa with \$114,667, Ysleta with \$104,768, and Tornillo with \$72,984.

The Ysleta, Douglas, and Tornillo PoEs had the largest YoY increase in the average value during the January to November 2025 period compared to 2024, with increases of \$35,181 (50.6%), \$19,334 (53.9%), and \$18,683 (34.4%), respectively. Only the Santa Teresa PoE registered a decline in the average value per loaded truck container during this period, decreasing by \$2,042 (-1.7%).

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



Note: Preliminary data for December 2025. The services sector 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.

² Jesús Estrada. "Maquila en Ciudad Juárez ha perdido miles de empleos." La Jornada (Mexico City, México), January 31, 2026. <https://www.jornada.com.mx/noticia/2026/01/31/estados/maquila-en-ciudad-juarez-ha-perdido-miles-de-empleos>

Top Ten U.S.-Mexico Border Ports of Entry for Average Value per Loaded Truck Container, USD

Port of Entry	A Jan - Nov 2024	B Jan - Nov 2025	B-A	B-A (Δ%)
Santa Teresa, NM	\$116,709	\$114,667	-\$2,042	-1.7%
Ysleta, TX	\$69,587	\$104,768	\$35,181	50.6%
Tornillo, TX	\$54,301	\$72,984	\$18,683	34.4%
Douglas, TX	\$35,862	\$55,196	\$19,334	53.9%
Laredo, TX	\$35,006	\$41,720	\$6,713	19.2%
Brownsville, TX	\$28,965	\$41,342	\$12,377	42.7%
Del Rio, TX	\$33,313	\$36,109	\$2,796	8.4%
Nogales, AZ	\$28,489	\$33,129	\$4,640	16.3%
Hidalgo, TX	\$29,001	\$30,957	\$1,957	6.7%
Otay Mesa, CA	\$25,708	\$29,177	\$3,469	13.5%
BOTA, TX	\$29,081	\$27,907	-\$1,174	-4.0%
Paso del Norte (Ports)	\$75,138	\$97,868	\$22,730	30.3%
U.S.-Mexico Border (Ports)	\$34,873	\$42,093	\$7,221	20.7%

Note: Top ten ports based on 2025. BOTA stands for Bridge of the Americas.
Source: Hunt Institute calculations using data from the Bureau of Transportation Statistics.

Sales Tax Collections

Sales Tax Collections Increase Throughout 2025

Sales tax collections overall increased across selected Texas cities in 2025 compared to 2024, suggesting possible growth in consumer spending; however, it is important to note that inflationary pressures could also have influenced this increase.³

In 2025, sales and use tax collections in selected Texas cities totaled \$2.8 billion, an increase of \$121.2 million (4.5%) from 2024. During this period, the cities of Houston and Dallas experienced the fastest increase at 8.2% and 5.4%, respectively. Fort Worth, El Paso, McAllen, Laredo, Austin, and San Antonio followed with growth rates of 4.4%, 3.7%, 3.1%, 2.7%, 0.7%, and 0.6%, respectively.

While generating total sales and use tax allocations of \$498.8 million during 2025, San Antonio experienced the slowest growth among the selected cities at 0.6% (\$3.1 million) compared to 2024. Unlike previous periods, every selected city experienced growth during the year.

In 2025, El Paso collected approximately \$140.6 million in sales and use tax allocations, an increase of \$5.0 million (3.7%) from 2024. This increase is notably higher than the growth from 2023 to 2024 (\$3.1 million, or 2.4%), reflecting an acceleration during the specified period.

³ Selected Texas cities refer to the six most populous cities (Houston, San Antonio, Dallas, Austin, Fort Worth, and El Paso) and two border cities (McAllen and Laredo).

Sales and Use Tax Allocations for Selected Texas Cities, Thousand USD

City	A Jan-Nov 2024	B Jan-Nov 2025	B-A	B-A (Δ%)
Houston, TX	\$870,645,403	\$942,472,124	\$71,826,720	8.2%
San Antonio, TX	\$495,697,720	\$498,832,126	\$3,134,407	0.6%
Dallas, TX	\$429,344,428	\$452,598,605	\$23,254,177	5.4%
Austin, TX	\$355,564,593	\$358,229,535	\$2,664,942	0.7%
Fort Worth, TX	\$237,707,057	\$248,166,351	\$10,459,294	4.4%
El Paso, TX	\$135,632,428	\$140,639,591	\$5,007,162	3.7%
McAllen, TX	\$98,017,274	\$101,085,051	\$3,067,778	3.1%
Laredo, TX	\$65,964,056	\$67,746,618	\$1,782,562	2.7%

Note: The given months and years represent the collection dates. Selected cities have sales and use tax rates of 1%, except for Laredo and McAllen which have rates of 1.25% and 2.0%, respectively. The maximum rate in Texas is 8.25%: a fixed 6.25% by the state and a 2.0% rate that combined local entities may charge.

Source: Hunt Institute calculations using data from the Texas Comptroller of Public Accounts.

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

Discover. Experience. Shape The Future of El Paso's Mission Trail

El Paso is working to strengthen and promote one of its greatest cultural treasures, the historic Mission Trail. We're conducting a brief survey to help us enhance visitor experiences and support local businesses.

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.

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