

Key Takeaways

Employment

- In November 2025, non-farm employment in Las Cruces and El Paso increased by 2,000 jobs (2.4%) and 1,100 jobs (0.3%), on a Year-over-Year (YoY) basis. Meanwhile, Ciudad Juárez lost 7,868 jobs (-1.6%) during the same period.
- Comparing January to November 2024 and November 2025, the manufacturing sector lost 9,490 jobs (-3.0%) in Ciudad Juárez and 200 jobs (-1.2%) in El Paso. Meanwhile, manufacturing employment in Las Cruces was stable for the same period.

Border Encounters

- From January to November 2025, total national border encounters decreased by 88.4% from the same period in 2024. Over the same period, Southwest border encounters declined by 89.8%, falling from approximately 1,004,052 to 102,434 encounters.
- All sectors along the Southwest border registered a decrease in encounters during the same period in 2024.¹ Moreover, encounters with nationals of all countries at the Southwest border declined significantly during this period.

Hotel Occupancy Rates

- In November 2025, hotel occupancy rates decreased Year-over-Year (YoY) in four of the six selected Metropolitan Statistical Areas (MSAs) compared to November 2024. Only Laredo and Ciudad Juárez experienced growth, with growth rates of 8.2% and 0.9%, respectively.²
- McAllen recorded the largest month-over-month (MoM) increase in November 2025, with a growth of 17.1%. Laredo and El Paso followed with rates of 11.0% and 2.8%, respectively. In contrast, Las Cruces, San Antonio, and Ciudad Juárez all recorded a MoM decline in November 2025.

Employment

Decline in Manufacturing Employment in the Paso del Norte Region

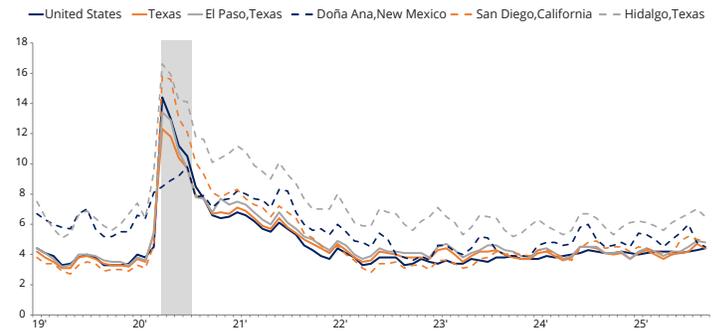
Non-farm employment increased in El Paso and Las Cruces between November 2024 and November 2025, while Ciudad Juárez experienced YoY losses.

Nationally, the U.S. added 758,000 non-farm jobs (0.5%) in November 2025 on a YoY basis. During the same period, Las Cruces and El Paso experienced YoY gains of 2,000 jobs (2.4%) and 1,100 jobs (0.3%), respectively. Meanwhile, Ciudad Juárez reported a loss of 7,868 jobs (-1.6%), marking the 26th 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 9,490 jobs (-3.0%) during this period. Despite the employment losses within the manufacturing sector, Index Juarez, a local manufacturing

1 The Southwest sectors include Big Bend, TX; Del Rio, TX; El Centro, TX; El Paso, TX; Laredo, TX; Rio Grande, TX; San Diego, CA; Tucson, AZ; and Yuma, AZ.
2 The selected MSAs include El Paso, TX; Las Cruces, NM; Ciudad Juárez, CH; Laredo, TX; McAllen, TX; and San Antonio, TX.

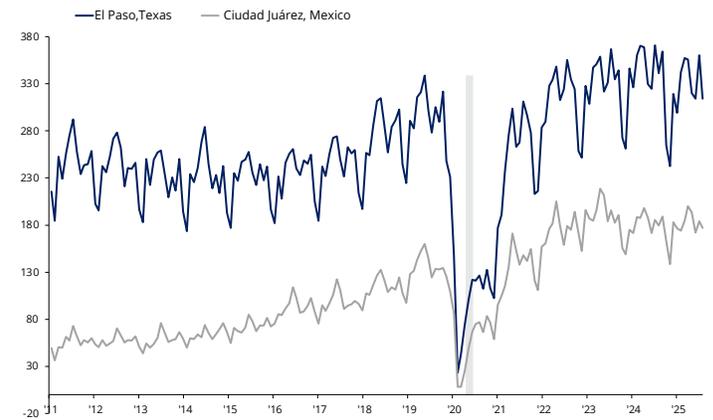
Quick-Glance Indicators

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



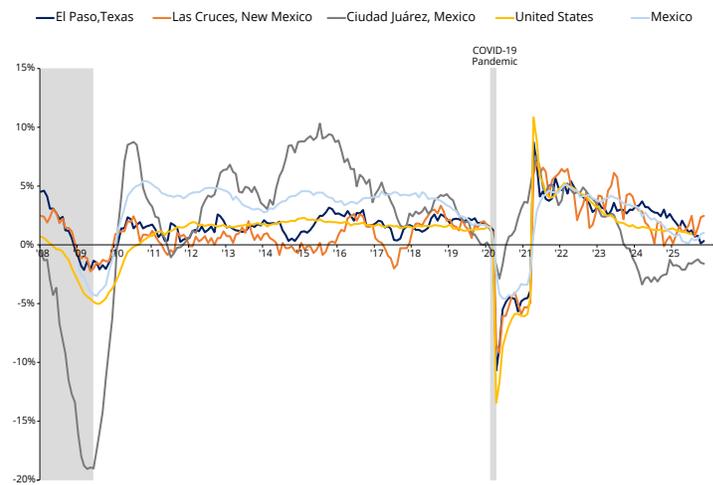
Note: Data as of September 2025. The shaded area indicates recession as defined by the National Bureau of Economic Research (2020 recession began in February and ended in April).
Source: Hunt Institute calculations using U.S. Bureau of Labor Statistics data.

El Paso and Ciudad Juárez Air Passengers, Thousands



Note: Data as of July 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.

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

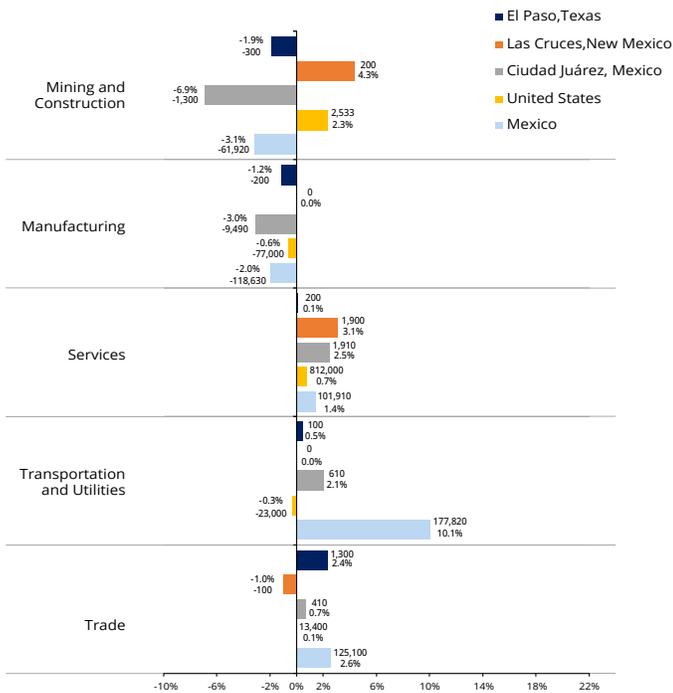


Note: Preliminary data for November 2025. Shaded areas indicate recession as defined by the National Bureau of Economic Research (The 2008 recession began in late 2007 and lasted until mid-2009. 2020 recession began in February and ended in November).
Source: Hunt Institute calculations using data from the U.S. Bureau of Labor Statistics and Instituto Mexicano del Seguro Social.

chamber, the manufacturing sector is adapting itself to changing global economic conditions and will remain an economic pillar in Ciudad Juárez.³

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 November 2024 to November 2025: trade grew by 1,300 jobs (2.4%), services by 200 jobs (0.1%), and transportation and warehousing by 100 jobs (0.5%). Meanwhile, mining and construction lost 300 jobs (-1.9%) and manufacturing 200 jobs (-1.2%). Las Cruces registered growth in two out of the five sectors: services by 1,900 jobs (3.1%) and mining and construction by 200 jobs (4.3%). Meanwhile, the trade sector lost 100 jobs (-1.0%), and the transportation and manufacturing sectors remained unchanged (0.0%).

Paso del Norte Total Non-farm Employment by Sector, November 2025 (Year-over-Year)



Note: Preliminary data for November 2025. 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.

Border Encounters

Border Encounters Decline Nationwide and Across the Southwest

From January to November 2025, total national border encounters declined by 88.4% compared to the same period in 2024, while Southwest border encounters fell by 89.8%.

All sectors of the Southwest border experienced a decline in border encounters from January to November 2025 compared to the same period in 2024. The Tucson, Yuma, and San Diego sectors recorded the largest relative decreases in encounters, at 93.8%, 93.4%, and 93.4%, respectively. In contrast, the Big Bend sector registered the smallest decline in encounters, at 43.1%. Moreover, El Paso

experienced a significant decrease in border encounters, falling by approximately 89.6%. This sharp drop in Southwest border encounters during the period January-November 2025 coincided with historically low apprehension levels, sustained month-to-month declines in encounters, and the absence of U.S. Border Patrol releases, as reported by U.S. Customs and Border Protection.⁴

United States Border Patrol (USBP) encounters include Title 8 Apprehensions and Title 42 Expulsions with demographic categories such as family unit encounters (FMU), unaccompanied children (UC), and single adult encounters (SA).⁵ Over the period January to November 2025, 78.1% of encounters at the Southwest border involved single adults, 12.2% involved family units, and 9.7% involved unaccompanied children.

Southwest Border encounters by citizenship also dropped significantly over this time. Encounters with Ecuadorian nationals dropped by 97.1%, making the largest percentage decline among all nationalities. Additionally, encounters with Brazilian and Colombian citizens declined by 96.7% and 96.5%, respectively.

From January to November 2025, encounters with Mexican citizens decreased by 331,437 compared to the same period in 2024, the largest total decline among all nationalities.

Southwest Border Encounters by Sector

Sector	2025			Total		B-A	B-A (Δ%)
	FMU	SA	UC	A Jan - Nov 2024	B Jan - Nov 2025		
Big Bend, TX	154	2,217	56	4,267	2,427	-1,840	-43.1%
Del Rio, TX	1,496	9,252	837	108,742	11,585	-97,157	-89.3%
El Centro, CA	172	1,415	77	13,907	1,664	-12,243	-88.0%
El Paso, TX	1,378	17,527	1,798	198,132	20,703	-177,429	-89.6%
Laredo, TX	581	7,877	1,293	27,603	9,751	-17,852	-64.7%
Rio Grande, TX	3,190	12,680	3,417	76,162	19,287	-56,875	-74.7%
San Diego, CA	2,393	13,668	788	253,584	16,849	-236,735	-93.4%
Tucson, AZ	2,433	13,642	1,531	282,998	17,606	-265,392	-93.8%
Yuma, AZ	678	1,726	158	38,657	2,562	-36,095	-93.4%
Southwest Border Total	12,475	80,004	9,955	1,004,052	102,434	-901,618	-89.8%
National Total	12,897	96,441	10,118	1,028,979	119,456	-909,523	-88.4%

Note: Numbers are by calendar year; USBP reports by fiscal year from October to September. FMU are family unit encounters, UC are unaccompanied children's encounters and SA are single adult encounters.

Source: Hunt Institute calculations using data from the U.S. Customs and Border Protection.

³ Carlos Omar Barranco. "Con todo y aumento a ISN y pérdida de empleo, hay nuevos proyectos en maquila." Norte Digital (Ciudad Juárez, México). January 12, 2026. <https://nortedigital.mx/con-todo-y-aumento-a-isn-y-perdida-de-empleo-hay-nuevos-proyectos-en-maquila/>

⁴ U.S. Department of Homeland Security. "Border Crossings Once Again at a Record Low in November 2025," press release, December 4, 2025. DHS.gov, <https://www.dhs.gov/news/2025/12/04/border-crossings-once-again-record-low-november-2025>.

⁵ Apprehensions refers to the physical control or temporary detention of a person by USBP between POEs who is not lawfully in the U.S. which may or may not result in an arrest. Title 42 Expulsions refers to individuals encountered by USBP and OFO and expelled to the country of last transit or home country in the interest of public health under Title 42 U.S.C. 265 from March 21, 2020, to May 11, 2023.

Southwest Border Encounters by Citizenship

Citizenship	A Jan-Nov 2024	B Jan-Nov 2025	B-A	B-A (Δ%)
Mexico	392,131	60,694	-331,437	-84.5%
Guatemala	125,133	11,737	-113,396	-90.6%
Honduras	64,919	6,375	-58,544	-90.2%
Other	84,327	4,942	-79,385	-94.1%
Venezuela	36,837	3,901	-32,936	-89.4%
Colombia	73,587	2,611	-70,976	-96.5%
El Salvador	30,701	2,585	-28,116	-91.6%
Ecuador	77,884	2,295	-75,589	-97.1%
Cuba	5,925	1,837	-4,088	-69.0%
India	18,628	1,370	-17,258	-92.6%
China	25,007	1,013	-23,994	-95.9%
Peru	20,851	757	-20,094	-96.4%
Brazil	20,030	671	-19,359	-96.7%
Nicaragua	18,363	665	-17,698	-96.4%
Turkey	7,764	639	-7,125	-91.8%
Russia	645	151	-494	-76.6%
Haiti	532	85	-447	-84.0%
Romania	709	74	-635	-89.6%

Note: Encounters involving Canadian, Ukrainian, Philippine, and Burmese citizenship were excluded due to the availability of data.

Source: Hunt Institute calculations using data from U.S. Customs and Border Protection.

Hotel Occupancy Rates

Hotel Occupancy Rates Remain on a Downward Trajectory into the New Year

Four of the six selected MSAs registered YoY declines in hotel occupancy rates in November 2025, compared with November 2024.

In November 2025, Ciudad Juárez and Laredo recorded the highest hotel occupancy rates among the selected MSAs, at 75.1% and 72.6%, respectively.¹ In contrast, Las Cruces yielded the lowest occupancy rate at 50.2%.

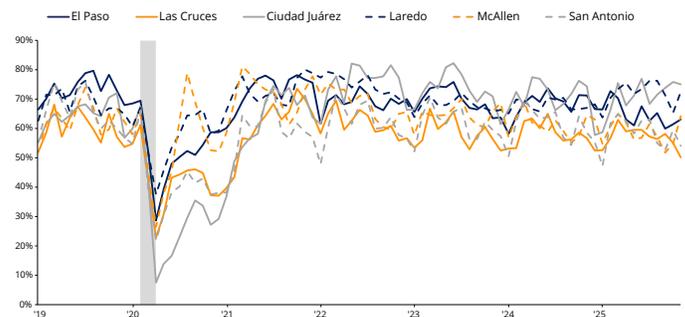
During the same period, YoY performance remained mixed, with four of the six selected MSAs registering a YoY decline in November 2025 compared with November 2024. Ciudad Juárez and Laredo exhibited the only YoY increases in hotel occupancy rates, with average growth rates of 4.6%. Conversely, El Paso, Las Cruces, McAllen, and San Antonio experienced YoY decreases in hotel occupancy rates, with an average decline of 7.7% in November 2025. This pattern aligns with broader national trends identified in a PWC's report, U.S. Hospitality Directions: December 2025, which notes "business travel remained slow to rebound, group bookings

⁶ Abhi Jain. "PWC: U.S. Hospitality Direction: December 2025." PWC (USA), December 2, 2025. <https://www.pwc.com/us/en/industries/consumer-markets/hospitality-leisure/us-hospitality-directions.html#:~:text=Lower%2Dpriced%2Dhotels%2Dare%2Dlikely,group%2Dand%2Dmeeting%2Ddriven%2Ddemand.>

fluctuated amid economic uncertainty, inbound international travel declined in the face of immigration headwinds, and high interest rates weighed on both consumers and developers."⁷

Over the course of November 2025, half of the six selected cities experienced a Month-over-Month (MoM) increase. McAllen led with the highest MoM increase at 17.1%, followed by Laredo and El Paso at 11.0% and 2.8%, respectively. However, Las Cruces, San Antonio, and Ciudad Juárez registered MoM declines. Las Cruces and San Antonio experienced declines of 8.9%, while Ciudad Juárez incurred a smaller decline of 1.2%.

Hotel Occupancy Rates by MSA through November 2025 (Year-Over-Year, %)



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

Source: Hunt Institute using STR data.

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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