

## Key Takeaways

### Employment

- From January 2025 to January 2026, the four largest northern border metropolitan areas registered a Year-over-Year (YoY) decline in total non-farm employment.<sup>1</sup>
- Juárez registered a net loss of 11,337 jobs (-2.3%) during this period, driven largely by the 14,064 jobs (-4.6%) lost in manufacturing.
- The trade sector experienced employment growth in all four metropolitan areas, following the national trend.

### Trade

- In 2025, all Paso del Norte ports of entry (PoEs) experienced a Year-over-Year (YoY) increase in land exports, with the exception of Santa Teresa, which registered a 27.4% decrease compared with 2024.<sup>2</sup>
- A similar pattern was observed for total land imports, with only Santa Teresa registering YoY declines during this period.
- Growth in land imports in 2025 was particularly strong in Tornillo (236.3%)BOTA (78.8%), and Ysleta (33.7%), contributing to an overall 8.6% increase among the top ten ports.

### Border Crossings

- The Bridge of the Americas (BOTA) Port of Entry (PoE) recorded the second largest number of noncommercial crossings among the U.S.-Mexico PoE's, with 18,609,649 crossings in 2025.<sup>3</sup>
- The Tornillo and BOTA PoEs were the only land ports in the Paso del Norte Region to experience an increase in commercial crossings from 2024 to 2025.

## Quick-Glance Indicators

Top 5 Occupation Groups Demanded for Jobs in El Paso County, March 2025 to March 2026

Occupation Groups	El Paso Total Job Postings	El Paso Share (%)	Doña Ana County Share (%)	Texas Share (%)	U.S. Share (%)
Retail Sales Persons	2,442	4.6%	0.1%	0.7%	0.5%
Registered Nurses	2,173	4.1%	0.0%	0.0%	0.0%
First-Line Supervisors of Retail Sales Workers	1,901	3.6%	0.0%	0.3%	0.1%
Medical and Health Services Managers	1,767	3.3%	0.1%	0.3%	0.1%
Stockers and Order Fillers	1,204	2.3%	0.0%	0.0%	0.2%
<b>Sum of Top 5 Occupation Groups in EP County</b>	<b>9,487</b>	<b>17.9%</b>			

Note: Numbers are by active online job postings as of March 13, 2025 and 3-digit occupation code.  
Source: Hunt Institute calculations using JobsEQ data.

Average Number of Active IMMEX Firms

Region	A 2019	B 2024	C 2025	C-A (Δ)	C-B (Δ)	Share (%) 2025
Juárez	328	320	330	2	10	6.3%
Nuevo Laredo	35	36	32	-3	-3	0.6%
Reynosa	152	157	155	3	-2	3.0%
Tijuana	595	605	601	6	-4	11.5%
<b>National</b>	<b>5,146</b>	<b>5,195</b>	<b>5,229</b>	<b>83</b>	<b>34</b>	<b>100.0%</b>

Note: IMMEX stands for Industria Manufacturera, Maquiladora y de Servicios de Exportación, a Mexican program allowing companies to temporarily import inputs tax-free for manufacturing exports.  
Source: Hunt Institute using data from INEGI.

### Employment

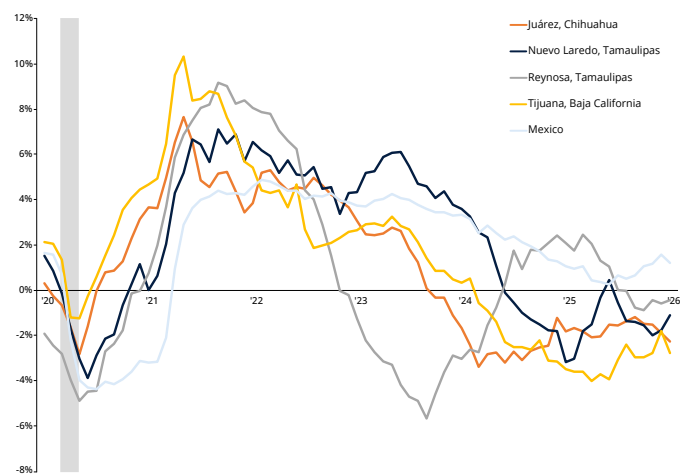
## Total Non-farm Employment Losses in the Largest Mexican Border Metropolitan Areas

The four largest Mexican border metropolitan areas experienced a YoY decrease in total non-farm employment between January 2025 and January 2026.

Nationally, Mexico added 226,116 non-farm jobs (1.1%) from January 2025 to January 2026. In contrast, non-farm employment for the four largest Mexican border metropolitan areas decreased over this period. The trade sector was the only sector to experience YoY employment growth across all four metropolitan areas, following the national trend.

Juárez reported a loss of 11,337 jobs (-2.3%), marking the 28th 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 14,064 jobs (-4.6%) during this period.

Monthly Employment in Mexico and Largest Border Metropolitan Areas through January 2026 (YoY, Δ%)



Note: Data as of January 2026. The shaded area indicates 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 Instituto Mexicano del Seguro Social.

1 The selected metropolitan areas are based on the four most populous municipalities within the northern Mexican border. The resulting four metropolitan areas are: Juárez, Chihuahua; Nuevo Laredo, Tamaulipas; Reynosa, Tamaulipas; and Tijuana, Baja California.

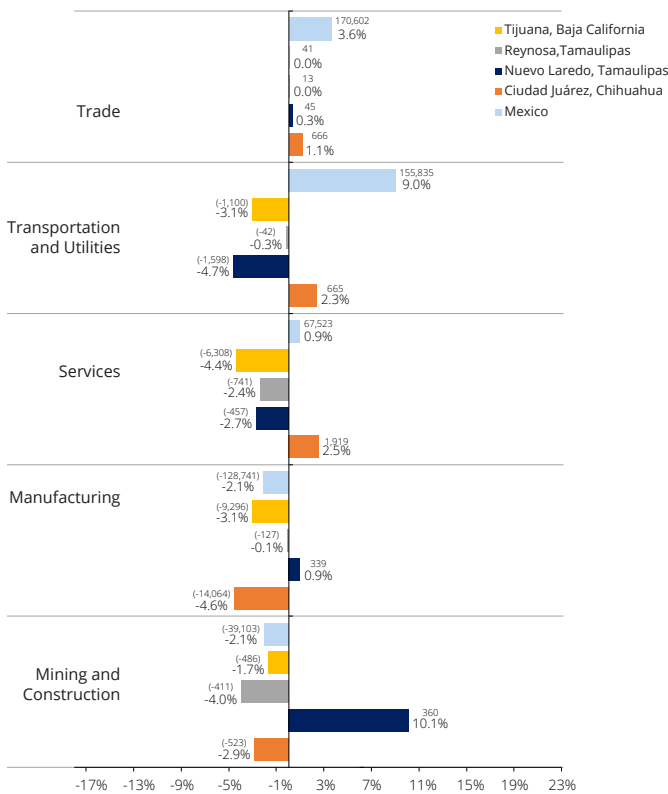
2 Ports of entry within the Paso del Norte region include: Bridge of the Americas (BOTA), TX; Santa Teresa, NM; Tornillo, TX; and Ysleta, TX.

3 The top ten selected PoEs for commercial border crossings include Laredo, TX; Otay Mesa, CA; Hidalgo, TX; Ysleta, TX; Nogales, AZ; Calexico East, CA; Eagle Pass, TX; Brownsville, TX; Santa Teresa, NM; and Bridge of the Americas. The top ten selected PoEs for non-commercial border crossings include San Ysidro, CA; Bridge of the Americas, TX; Laredo, TX; Otay Mesa, CA; Calexico, CA; Brownsville, TX; Hidalgo, TX; Nogales, AZ; San Luis, CA; and Ysleta, TX.

The remaining largest metropolitan areas also experienced YoY non-farm employment losses in January 2026 compared to those of January 2025: Tijuana with 17,149 jobs (-2.8%), Reynosa with 1,308 jobs (-0.5%), and Nuevo Laredo with 1,311 jobs (-1.2%).

The Hunt Institute tracks five non-farm employment sectors. In Juárez, the following sectors experienced employment growth on a YoY basis from January 2025 to January 2026: services by 1,919 jobs (2.5%), transportation by 665 jobs (2.3%), and trade with 666 jobs (1.1%), while manufacturing lost 14,064 jobs (-4.6%), the mining and construction sector lost 523 jobs (-2.9%).

**Largest Border Metropolitan Areas Total Non-farm Employment by Sector, January 2026 (Year-over-Year)**



**Note:** Preliminary data for January 2026. Services exclude Transportation and Utilities, and Trade. Beginning July 1, 2025, IMSS started incorporating digital platform workers under the new pilot rules, causing the sharp increase in the transportation and utilities sector.

**Source:** Hunt Institute calculations using data from Instituto Mexicano del Seguro Social.

## Trade Mixed Growth in Land Trade at Paso del Norte Ports of Entry

The total land imports and exports through the Paso del Norte PoEs showed mixed growth from 2024 to 2025.<sup>5</sup>

In terms of land exports, in 2025 the Paso del Norte PoEs reached \$64,571 million, a \$6,047 million (10.3%) increase compared to 2024. In the same year, three of the region's PoEs ranked among the top ten land ports in terms of exports: Ysleta ranked second, totaling \$38,636 million; BOTA was fifth, at \$13,989 million; and Santa Teresa was seventh, with \$11,648 million.

In 2025, all Paso del Norte PoEs experienced a YoY increase in land exports, with the exception of Santa Teresa, which recorded a 27.4% decrease compared with 2024. During 2025, the Ysleta, BOTA, and Tornillo PoEs had YoY increases compared to 2024 levels of \$9,658 million (33.3%), \$734 million (5.5%), and \$56 million (23.3%), respectively.

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

Port of Entry	2024	2025	2024 vs 2025 (Δ%)
1. Laredo, TX	\$128,272	\$126,829	-1.1%
2. Ysleta, TX*	\$28,978	\$38,636	33.3%
3. Otay Mesa, CA	\$24,247	\$21,547	-11.1%
4. Hidalgo, TX	\$15,253	\$14,358	-5.9%
5. BOTA, TX*	\$13,255	\$13,989	5.5%
6. Eagle Pass, TX	\$13,282	\$12,068	-9.1%
7. Santa Teresa, NM*	\$16,048	\$11,648	-27.4%
8. Nogales, AZ	\$10,773	\$11,221	4.2%
9. Brownsville, TX	\$11,439	\$10,863	-5.0%
10. Calexico-East, CA	\$8,843	\$8,257	-6.6%
17. Tornillo, TX*	\$242	\$298	23.3%
<b>Total Top Ten PoEs</b>	<b>\$270,392</b>	<b>\$269,415</b>	<b>-0.4%</b>
<b>Total U.S.-MX Border</b>	<b>\$277,408</b>	<b>\$276,209</b>	<b>-0.4%</b>

**Note:** Top ten ports of entry based on 2025 Trade data. BOTA stands for Bridge of the Americas. The ports of entry with an asterisk (\*) are located within the Paso del Norte region.

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

In 2025, three out of four Paso del Norte PoEs had a YoY increase in land imports. In 2025, land imports through the Paso del Norte PoEs reached \$116,228 million. Three out of the four region PoEs were among the top ten U.S.-Mexico border PoEs for total land imports: Ysleta ranked second, with \$77,183 million; Santa Teresa ranked seventh, with \$22,158 million; and BOTA ranked eighth with \$13,613 million.

During 2025, three out of four PoEs within the Paso del Norte region had YoY increases in land imports compared to 2024 levels: Ysleta by \$19,454 million (33.7%), BOTA by \$6,000 (78.8%), and Tornillo by \$2,300 million (236.3%). Only the Santa Teresa PoE had a YoY decrease during this period of \$1,620 million (-6.8%).

<sup>5</sup> Ports of entry within the Paso del Norte region include: Bridge of the Americas (BOTA), TX; Santa Teresa, NM; Tornillo, TX; and Ysleta, TX.

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

Port of Entry	2024	2025	2024 vs 2025 (Δ%)
1. Laredo, TX	\$210,597	\$227,107	7.8%
2. Ysleta, TX*	\$57,729	\$77,183	33.7%
3. Otay Mesa, CA	\$41,392	\$42,520	2.7%
4. Eagle Pass, TX	\$30,442	\$31,378	3.1%
5. Hidalgo, TX	\$31,098	\$30,514	-1.9%
6. Nogales, AZ	\$24,013	\$23,317	-2.9%
7. Santa Teresa, NM*	\$23,778	\$22,158	-6.8%
8. BOTA, TX*	\$7,613	\$13,613	78.8%
9. Calexico-East, CA	\$14,116	\$12,532	-11.2%
10. Brownsville, TX	\$9,639	\$8,899	-7.7%
12. Tornillo, TX*	\$973	\$3,273	236.3%
<b>Total Top Ten PoEs</b>	<b>\$450,417</b>	<b>\$489,221</b>	<b>8.6%</b>
<b>Total U.S.-MX Border</b>	<b>\$459,828</b>	<b>\$500,742</b>	<b>8.9%</b>

**Note:** Top ten ports of entry based on 2025 trade data. BOTA stands for Bridge of the Americas. The ports of entry with an asterisk (\*) are located within the Paso del Norte region.

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

### Border Crossings

## Noncommercial and Commercial Crossings Differ in the Paso Del Norte Region in 2025

Three of the four Paso del Norte PoEs experienced increases in non-commercial crossings from 2024 to 2025, while commercial crossings increased at only half of those PoEs in the same period.

In 2025, the BOTA PoE recorded the second-largest number of non-commercial crossings among all U.S.-Mexico ports of entry, totaling 18,609,649 crossings in 2025, an increase of 746,176 crossings (4.2%) from 2024.

On the other hand, the Ysleta PoE experienced the region's largest increase in non-commercial crossings between 2024 and 2025, totaling 8,515,759 crossings in 2025, an increase of 772,106 (10.0%) from 2024, in relative terms. The Tornillo PoE followed with 1,715,599 noncommercial crossings in 2025, demonstrating an increase of 153,347 crossings (9.8%) from the previous year. While totaling 1,501,205 crossings in 2025, the Santa Teresa PoE was the only port of entry to record a decline in the Paso Del Norte Region for noncommercial crossings, decreasing by 277,962 crossings (15.6%) compared to 2024.

Commercial crossings in the Paso Del Norte region fluctuated between 2024 and 2025, with only the Tornillo and BOTA PoEs demonstrating growth. At the Tornillo PoE, crossings totaled 40,101 in 2025, rising by 22,245 (124.6%) from 2024, while crossings at the BOTA PoE totaled 103,267, an increase of 26,201 crossings (34.0%), in relative terms. In contrast, the Ysleta and Santa Teresa PoEs recorded 708,929 and 183,277 total crossings in 2025, respectively, representing individual declines in commercial crossings of 61,065 (-7.9%) and 13,067 (-6.7%) from 2024.

## Change in Noncommercial Traffic at the Top Ten U.S.-Mexico Border Ports of Entry

Port of Entry	2024	2025	Share (%)	B-A	B-A (%)
1. San Ysidro, CA	31,255,855	33,015,716	18.1%	1,759,861	5.6%
2. BOTA, TX*	17,863,473	18,609,649	10.2%	746,176	4.2%
3. Laredo, TX	13,693,114	13,733,767	7.5%	40,653	0.3%
4. Otay Mesa, CA	13,560,984	13,592,258	7.4%	31,274	0.2%
5. Calexico, CA	11,701,278	12,330,867	6.8%	629,589	5.4%
6. Brownsville, TX	12,259,493	11,664,757	6.4%	-594,736	-4.9%
7. Hidalgo, TX	12,583,418	10,980,547	6.0%	-1,602,871	-12.7%
8. Nogales, AZ	10,812,628	10,666,389	5.8%	-146,239	-1.4%
9. San Luis, AZ	8,135,222	8,609,411	4.7%	474,189	5.8%
10. Ysleta, TX*	7,743,653	8,515,759	4.7%	772,106	10.0%
19. Tornillo, TX*	1,562,252	1,715,599	0.9%	153,347	9.8%
22. Santa Teresa, NM*	1,779,167	1,501,205	0.8%	-277,962	-15.6%
<b>Total Top Ten PoEs</b>	<b>139,609,118</b>	<b>141,719,120</b>	<b>77.7%</b>	<b>2,110,002</b>	<b>1.5%</b>
<b>Total U.S.-MX Border</b>	<b>181,376,198</b>	<b>182,471,275</b>	<b>100.0%</b>	<b>1,095,077</b>	<b>0.6%</b>

**Note:** Top ten ports based on 2025 crossing data. Noncommercial border crossings include pedestrians, personal vehicles, bus, and train passengers. BOTA stands for Bridge of the Americas. The ports of entry with an asterisk (\*) are located within the Paso del Norte region.

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

## Change in Commercial Traffic at the Top Ten U.S.-Mexico Border Ports of Entry

Port of Entry	2024	2025	Share (%)	B-A	B-A (%)
1. Laredo, TX	4,958,781	4,614,780	47.2%	-344,001	-6.9%
2. Otay Mesa, CA	1,455,470	1,315,098	13.4%	-140,372	-9.6%
3. Hidalgo, TX	1,021,102	941,612	9.6%	-79,490	-7.8%
4. Ysleta, TX*	769,994	708,929	7.2%	-61,065	-7.9%
5. Nogales, AZ	568,995	514,363	5.3%	-54,632	-9.6%
6. Calexico,-East CA	508,994	456,822	4.7%	-52,172	-10.3%
7. Eagle Pass, TX	292,175	263,739	2.7%	-28,436	-9.7%
8. Brownsville, TX	275,448	186,553	1.9%	-88,895	-32.3%
9. Santa Teresa, NM*	196,344	183,277	1.9%	-13,067	-6.7%
10. BOTA, TX*	77,066	103,267	1.1%	26,201	34.0%
17. Tornillo, TX*	17,856	40,101	0.4%	22,245	124.6%
<b>Total Top Ten PoEs</b>	<b>10,124,369</b>	<b>9,288,440</b>	<b>94.9%</b>	<b>-835,929</b>	<b>-8.3%</b>
<b>Total U.S.-MX Border</b>	<b>10,664,994</b>	<b>9,783,781</b>	<b>100.0%</b>	<b>-881,213</b>	<b>-8.3%</b>

**Note:** Top ten ports based on 2025 crossing data. Numbers are for loaded container truck crossings. BOTA stands for Bridge of the Americas. The ports of entry with an asterisk (\*) are located within the Paso del Norte region.

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

### 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](http://utep.edu/hunt-institute)