

Key Takeaways

Employment

- In September 2025, non-farm employment in Mexico increased by 79,565 jobs (0.4%) on a Year-over-Year (YoY) basis. Meanwhile, the four largest northern border metropolitan areas registered a decrease during the same period.¹
- Juárez lost 6,074 jobs (-1.2%) between September 2024 and September 2025.
- Over the same period, manufacturing employment in Juárez fell by 8,746 jobs (-2.8%). Tijuana also exhibited YoY employment losses in the manufacturing sector during this time, while Nuevo Laredo and Reynosa registered growth.

Trade

- Total land exports had a YoY increase between January to July 2025 in the Ysleta PoE compared to 2024 levels. Meanwhile, the Bridge of the Americas (BOTA), Santa Teresa, and Tornillo ports of entry (PoEs) had YoY declines for the same period.
- The January to July 2025 period had YoY increases in total land imports across the BOTA, Tornillo, and Ysleta PoEs. Of the Paso del Norte PoEs, only Santa Teresa had YoY declines in total land imports during this period.²

Border Crossings

- Between January and August 2025, the number of truck crossings at the BOTA and Tornillo ports of entry (PoE) increased compared to the same period in 2024.³ Meanwhile, the Santa Teresa and Ysleta land ports experienced a decline in truck crossings.
- The BOTA PoE recorded the largest numerical increase when comparing January-August 2025, to the same period in 2024, with an increase of 20,642 crossings.

Employment

Negative Growth in the Non-Farm Employment in the Largest Mexican Border Metropolitan Areas

Nationally, Mexico added 79,565 non-farm jobs (0.4%) on a YoY basis in September 2025. In contrast, non-farm employment for the four largest Mexican border metropolitan areas decreased over the same period.

Juárez reported a loss of 6,074 jobs (-1.2%), marking the 24th 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 8,746 jobs (-2.8%) during this period. The Asociación Nacional de Importadores y Exportadores de la República

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; TX; Santa Teresa, NM; and Del Rio, TX.

Quick-Glance Indicators

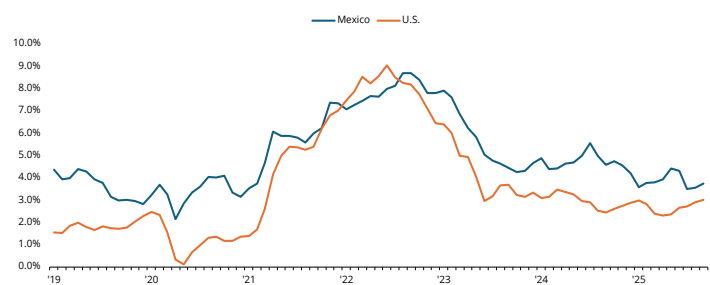
Top 5 Certifications Demanded for Jobs in El Paso County, January-October 2025

Certification	El Paso Total Job Postings	El Paso Share (%)	Doña County Share (%)	Texas Share (%)	U.S. Share (%)
Driver's License	2,328	5.1%	24.4%	3.9%	3.6%
Basic Life Support (BLS)	1,627	3.5%	28.8%	3.5%	4.3%
Registered Nurse (RN)	1,123	2.4%	19.9%	2.9%	3.5%
Certification in Cardiopulmonary Resuscitation (CPR)	1,079	2.3%	20.4%	2.1%	2.3%
Advanced Cardiac Life Support Certification (ACLS)	628	1.4%	14.9%	1.3%	1.7%
Sum of Top 5 Certifications Demanded in EP County	6,785	14.8%			

Note: Numbers are by active online job postings as of 11/06/2024 and 3-digit occupation code. Orange cells highlight the top certification demanded for each region.

Source: Hunt Institute calculations using JobsEQ data.

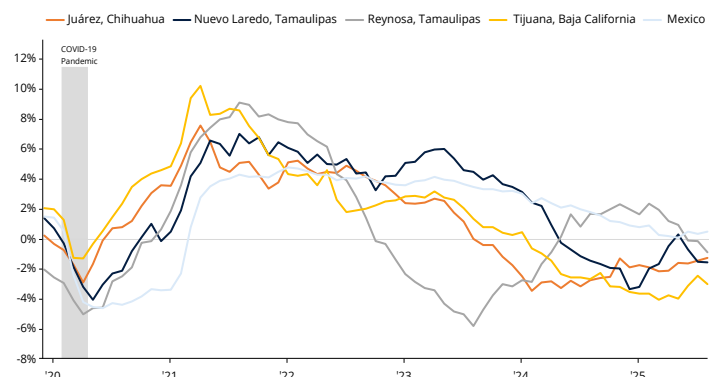
Inflation in the U.S. and Mexico



Note: Data as of September 2025. U.S. inflation was calculated from annual changes in the seasonally adjusted Consumer Price Index for all urban consumers (CPI-U). Mexico's data is based on the National Consumer Price Index (INPC), using the 2018 base and updated 2024 weights.

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

Monthly Employment in Mexico and Largest Border Metropolitan Areas through September 2025 (YoY, Δ%)



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

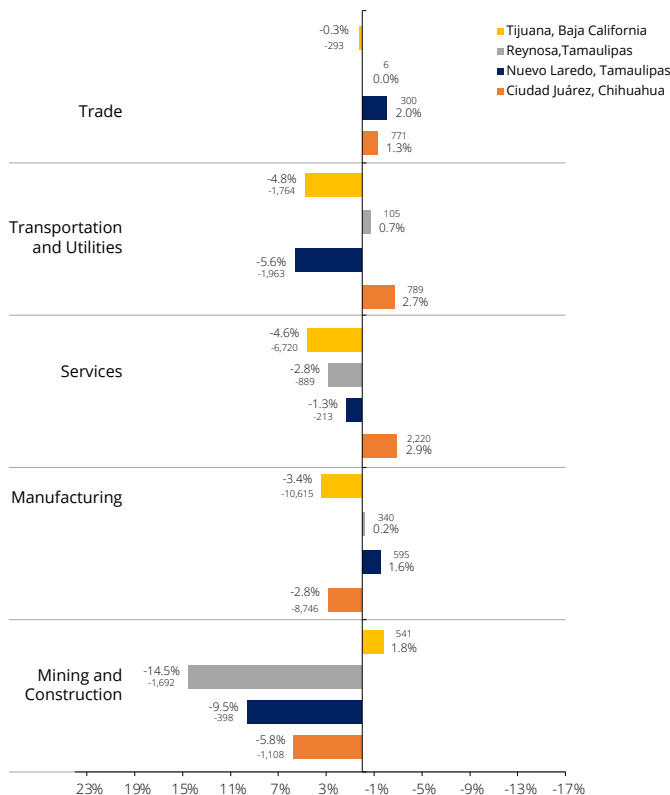
Source: Hunt Institute calculations using data from Instituto Mexicano del Seguro Social.

Mexicana (ANIERM) states that uncertainty from international trade tensions, changes in Mexican legislation, the review of the USMCA, and recent labor, judicial, and upcoming customs and administrative adjustments affecting the maquiladora sector have slowed regional growth.⁴

The remaining largest metropolitan areas also experienced YoY non-farm employment losses in September 2025 compared to those of September 2024: Tijuana with 18,851 jobs (-3.0%), Reynosa with 2,130 jobs (-0.9%), and Nuevo Laredo with 1,679 jobs (-1.5%). The Hunt Institute will publish a white paper analyzing employment trends across the four largest northern border metropolitan areas for the first two quarters of 2025.

The Hunt Institute tracks five non-farm employment sectors. In Juárez, the following sectors experienced employment growth on a YoY basis from September 2024 to September 2025: services by 2,220 jobs (2.9%), transportation by 789 jobs (2.7%), and trade with 771 jobs (1.3%), while manufacturing lost 8,746 jobs (-2.8%), the mining and construction sector lost 1,108 jobs (-5.8%).

Largest Border Metropolitan Areas Total Non-Farm Employment by Sector, September 2025 (YoY)



Note: Services exclude Transportation and Utilities, and Trade.

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

Trade

Paso del Norte Ports of Entry Report Mixed Growth in Land Exports and Imports

The total land imports and exports through the Paso del Norte PoEs showed mixed growth from January to July 2025 compared to the same period in 2024.⁵

In terms of land exports, the Paso del Norte PoEs processed \$58,524 million, a \$7,921 million (15.7%) increase compared to 2023. Between January and July 2025, the Paso del Norte PoEs reached \$37,176 million. This represents \$3,700 million (11.1%) YoY increase compared to the same period in 2024. During this period, three of the region's PoEs ranked among the top ten land ports in terms of exports: Ysleta ranked second, totaling \$22,012 million; BOTA was fifth, at \$7,842 million; and Santa Teresa was seventh, with \$7,179 million.

In 2024, the Paso del Norte PoEs had a YoY increase in land exports, except for BOTA, with a 10.6% decrease compared with 2023. Between January and July 2025, the Santa Teresa, Tornillo, and BOTA PoEs had YoY losses compared to 2024 levels of \$1,544 million (-17.7%), \$5,311 million (-3.6%), and \$180 million (-2.2%), respectively. Only the Ysleta PoE's land exports increased during this period by \$5,430 million (32.7%).

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

Port of Entry	'24	Jan-July '25	'23 vs '24 (Δ%)	Jan-July '24 vs '25 (Δ%)
1. Laredo, TX	\$128,272	\$75,242	4.7%	0.8%
2. Ysleta, TX	\$28,978	\$22,012	12.4%	32.7%
3. Otay Mesa, CA	\$24,247	\$13,014	9.0%	-6.9%
4. Hidalgo, TX	\$15,2531	\$8,529	-10.6%	-8.1%
5. BOTA, TX	\$13,255	\$7,842	-9.9%	-2.2%
6. Eagle Pass, TX	\$13,282	\$7,247	15.0%	-10.2%
7. Santa Teresa, NM	\$16,048	\$7,179	62.4%	-17.7%
8. Brownsville, TX	\$11,439	\$6,803	-9.8%	0.5%
9. Nogales, AZ	\$10,773	\$6,488	3.9%	4.6%
10. Calexico-East, CA	\$8,843	\$4,902	4.1%	-5.4%
19. Tornillo, TX	\$242	\$143	9.7%	-3.6%
Total Top Ten PoEs	\$270,392	\$159,258	5.9%	1.2%
Total U.S.-MX Border	\$277,409	\$163,396	6.0%	1.2%

Note: Top ten based on 2025.

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

⁴ Salvador Miranda, "Pierden maquiladoras en Juárez más de 20 mil empleos en un año", El Heraldo de Juárez (Ciudad Juárez, Mexico), October 22, 2025. <https://oem.com.mx/elheraldodejuarez/local/pierden-maquiladoras-en-juarez-mas-de-20-mil-empleos-en-un-ano-26415570>

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

Between 2023 and 2024, all four Paso del Norte PoEs had a YoY increase in land imports. From January to July 2025, land imports through the Paso del Norte PoEs reached \$64,980 million. Three out of the four region PoEs were among the top ten U.S.-Mexico border PoEs for total land imports for the first seven months of 2025: Ysleta ranked second, with \$42,365 million; Santa Teresa ranked seventh, with \$12,877 million; and BOTA ranked eighth, with \$7,931 million.

During the first seven months of 2025, three out of the four PoEs within the Paso del Norte region had YoY increases in land imports compared to 2024 levels: Ysleta by \$10,219 million (31.8%), BOTA by \$3,460 million (77.4%), and Tornillo by \$1,152 million (175.4%). Only the Santa Teresa PoE had a YoY decrease during this period of \$471 million (-3.5%).

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

Port of Entry	'24	Jan-July '25	'23 vs '24 (Δ%)	Jan-July '24 vs '25 (Δ%)
1. Laredo, TX	\$210,597	\$130,637	7.7%	9.1%
2. Ysleta, TX	\$57,729	\$42,365	15.1%	31.8%
3. Otay Mesa, CA	\$41,392	\$24,037	2.3%	4.2%
4. Hidalgo, TX	\$31,098	\$18,189	8.1%	0.7%
5. Eagle Pass, TX	\$30,442	\$18,079	19.1%	-0.1%
6. Nogales, AZ	\$24,013	\$14,526	9.6%	-4.9%
7. Santa Teresa, NM	\$23,778	\$12,877	33.9%	-3.5%
8. BOTA, TX	\$7,613	\$7,931	6.4%	77.4%
9. Calexico-East, CA	\$14,116	\$7,723	0.4%	-5.8%
10. Brownsville, TX	\$9,639	\$5,491	0.7%	-4.7%
12. Tornillo, TX	\$973	\$1,809	93.1%	175.4%
Total Top Ten PoEs	\$450,417	\$281,854	9.6%	9.2%
Total U.S.-MX Border	\$459,828	\$288,515	9.5%	9.3%

Note: Top ten based on 2025.
Source: Hunt Institute calculations using data from the U.S. Census Bureau.

Border Crossings
Truck Crossings Fluctuate within the Paso Del Norte Region as 2025 Nears Its End

Between January and August 2025, two of the four Paso del Norte PoEs registered increases in truck crossings compared to the same period in 2024.

Tornillo experienced the highest percentage growth in truck crossings in the Paso del Norte region, increasing by 9,831 crossings (75.5%) between January and August 2025, compared to the same period in 2024, placing it 17th among the selected PoEs with 22,854 crossings. BOTA registered the largest numerical increase in the region, adding 20,642 crossings (23.2%) and ranking 10th, with 109,719 crossings during the same period.

In contrast, the Santa Teresa PoE recorded the largest percentage decrease in truck activity, with a decrease of 5,131 (-4.4%) crossings over the same period, yet still ranked 9th with 110,434 crossings. Ysleta experienced the steepest regional decrease in the region, down 13,554 trucks (-3.1%), yet remained 4th overall with 429,628 crossings.

Number of Truck Crossings at the U.S.-Mexico Border

Port of Entry	'24	Jan-Aug '24	Jan-Aug '25	Jan-Aug '25 (%)	'23 vs '24 (Δ%)	Jan-Aug '24 vs '25 (Δ%)
1. Laredo, TX	3,026,632	2,055,944	1,994,624	39.2%	3.1%	-3.0%
2. Otay Mesa, CA	1,059,759	716,707	657,751	12.9%	2.5%	-8.2%
3. Hidalgo, TX	721,489	480,350	473,282	9.3%	1.8%	-1.5%
4. Ysleta, TX	670,627	443,182	429,628	8.4%	4.7%	-3.1%
5. Calexico-East, CA	462,526	311,347	307,634	6.0%	1.0%	-1.2%
6. Nogales, AZ	404,588	283,819	289,583	5.7%	5.9%	2.0%
7. Eagle Pass, TX	256,225	159,850	243,493	4.8%	21.6%	52.3%
8. Brownsville, TX	304,278	210,566	197,263	3.9%	-6.4%	-6.3%
9. Santa Teresa, NM	169,241	115,565	110,434	2.2%	-5.3%	-4.4%
10. BOTA, TX	133,841	89,077	109,719	2.2%	49.1%	23.2%
17. Tornillo, TX	20,840	13,023	22,854	0.4%	191.9%	75.5%
Total Top Ten PoEs	7,209,206	4,866,407	4,813,411	94.5%	3.5%	-1.1%
Total U.S.-MX Border	7,617,207	5,138,770	5,092,486	100.0%	3.5%	-0.9%

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

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



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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