

Key Takeaways

Employment

- In August 2025, non-farm employment in El Paso and Las Cruces increased by 1,900 jobs (0.5%) and 600 jobs (0.7%), on a Year-over-Year (YoY) basis. Meanwhile, Ciudad Juárez lost 2,638 jobs (-0.5%) during the same period.
- Between August 2025 and August 2024, the manufacturing sector in Ciudad Juárez lost 8,560 jobs (-2.7%), while manufacturing employment in Las Cruces and El Paso was stable.

Border Crossings

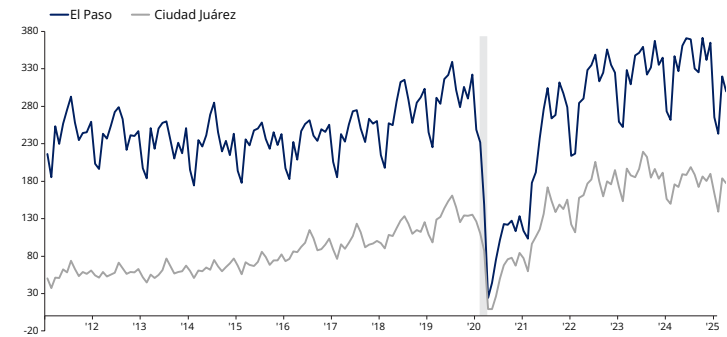
- From January to August 2025, total commercial and noncommercial border crossings through the top ten Ports of Entry (PoEs) at the U.S.-Mexico Border by traffic volume moved in opposite directions compared to the same period in 2024, with commercial crossings falling by 13.7% and noncommercial crossings rising slightly by 0.5%.¹
- All top ten Ports of Entry (PoEs) recorded a decrease in commercial border crossings and a slight increase in noncommercial crossings from January to August 2025, compared to the previous year.
- During the first eight months of 2025, the Bridge of the Americas (BOTA) PoE registered an increase of 2,621 commercial crossings (5.1%) and 573,097 noncommercial crossings (5.0%), compared to 2024.

Sales Tax Collections

- During the first eight months of 2025, selected cities experienced an overall increase of \$78.2 million (4.5%) in total sales and use tax collections compared to the same period in 2024.² Houston had the largest increase, rising by \$47.4 million (8.2%).
- El Paso's sales and use tax collection increased by approximately \$1.15 million (1.3%) during the first eight months of 2025 compared with the same period in 2024; this increase is consistent with the growth experienced from 2023 to 2024 (\$1.11 million or 1.3%).

Quick-Glance Indicators

El Paso and Ciudad Juárez Air Passengers, Thousands



Note: Data as of August 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.

Top 5 Occupation Groups Demanded for Jobs in El Paso County, January-September

Occupation Groups	El Paso Total Job Postings	El Paso Share (%)	Dona Ana Share (%)	Texas Share (%)	U.S. Share (%)
Retail Salespersons	2,051	4.7%	2.8%	3.1%	3.0%
Registered Nurses	1,762	4.0%	13.9%	4.7%	6.1%
First-Line Supervisors of Retail Sales Workers	1,674	3.8%	2.9%	2.9%	2.8%
Medical and Health Services Managers	1,524	3.5%	3.3%	2.7%	2.9%
Stockers and Order Fillers	962	2.2%	1.1%	1.9%	1.7%
Sum of Top 5 Occupation Groups Demanded in EP County	7,973	18.1%			

Note: Numbers are by active online job postings as of 09/30/2025 and 3-digit occupation code. Orange cells highlight the top occupation groups demanded for each region.
Source: Hunt Institute calculations using JobsEQ data.

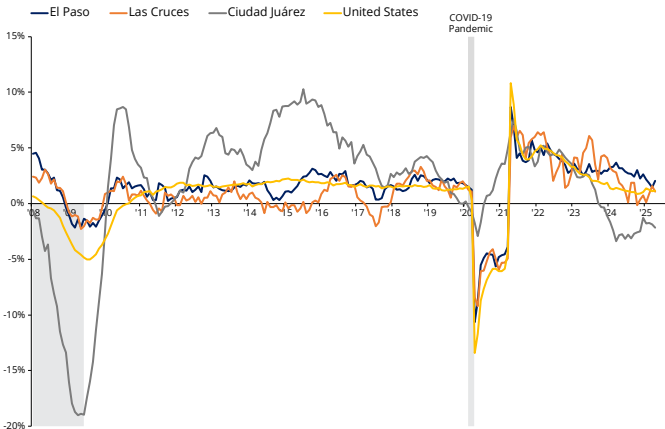
Employment

Limited Growth in Non-Farm Employment in the Paso del Norte Region

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

Nationally, the U.S. added 1,340,000 non-farm jobs (0.8%) in August 2025 on a YoY basis. During the same period, El Paso and Las Cruces experienced YoY gains of 1,900 jobs (0.2%) and 600 jobs (0.7%), respectively. Meanwhile, Ciudad

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



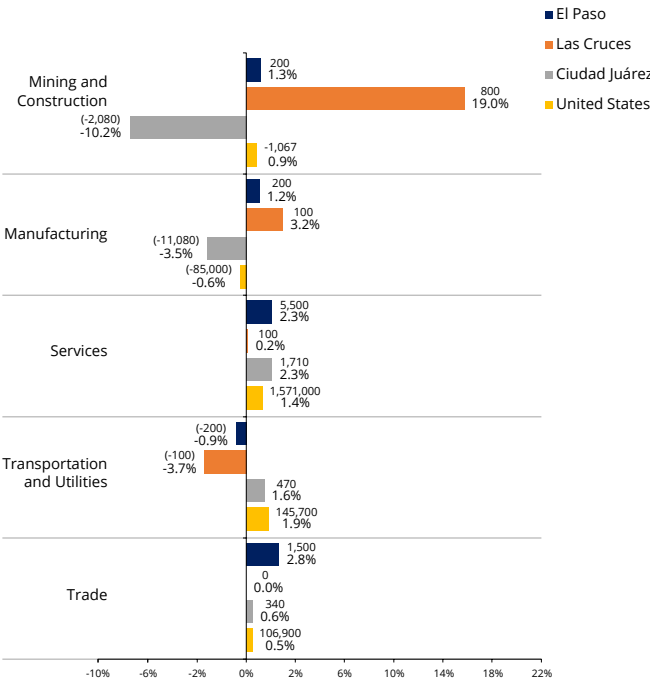
Note: Preliminary data for August 2025. Shaded areas indicate recession as defined by the National Bureau of Economic Research (The 2008 recession began in late 2007 and lasted until mid-2009. 2020 recession began in February and ended in August).
Source: Hunt Institute calculations using data from the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

¹ The top ten selected PoEs for commercial border crossings include Laredo, TX; Otay Mesa, CA; Hidalgo, TX; Ysleta, TX; Nogales, AZ; Calexico East, CA; Brownsville, TX; Eagle Pass, TX; Santa Teresa, NM; and Del Rio, TX. The top ten selected PoEs for noncommercial border crossings include San Ysidro, CA; Bridge of the Americas, TX; Laredo, TX; Otay Mesa, CA; Hidalgo, TX; Brownsville, TX; Calexico, CA; Nogales, AZ; San Luis, AZ; and Ysleta, TX.
² 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).

Juárez reported a loss of 2,683 jobs (-0.5%), marking the 23rd 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 8,560 jobs (-2.7%) during this period. Ciudad Juárez remains in "red alert", according to a local chapter of the national Chamber of Manufacturing, Canacintra, due to the structural impact on employment caused by a decrease in competitiveness along the northern border, especially in the maquiladora sector.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 August 2024 to August 2025: trade grew by 1,400 jobs (2.6%) and services by 700 jobs (0.3%), while mining and construction lost 200 jobs (-1.2%), and the transportation and manufacturing sectors remained unchanged (0.0%). Las Cruces registered growth in two out of the five sectors: services by 500 jobs (0.8%), and mining and construction by 400 jobs (8.7%). Meanwhile, the trade sector lost 300 jobs (-3.1%), and the transportation and manufacturing sectors remained unchanged (0.0%).

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



Note: Preliminary data for August 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.

3 Salvador Miranda, "Registra Juárez leve repunte en empleos; suman más de mil puestos en septiembre." El Heraldo de Juárez (Ciudad Juárez, Mexico), October 9, 2025. <https://oem.com.mx/elheraldodejuarez/local/registra-juarez-leve-repunte-en-empleos-suman-mas-de-mil-puestos-en-septiembre-26204922>

Border Crossings

Diverging Trends in U.S.-Mexico Border Crossings

Total commercial border crossings at the U.S.-Mexico Border, through the top ten Ports of Entry (PoEs) by traffic volume, fell by 13.7% while noncommercial border crossings rose slightly by 0.5%, between January and August 2025 compared to the same period in 2024.

Between January and August 2025, total commercial border crossings through the top ten PoEs fell below those of the same period in 2024, with a decline of 946,214 crossings (-13.7%).⁴ During the first eight months of 2025, commercial crossings through these PoEs accounted for 95.1% of all U.S.-Mexico commercial crossings. Comparing January-August 2025 with the same period in the previous year, all top ten PoEs registered a decrease in commercial crossings: Laredo recorded the sharpest drop with 391,896 fewer crossings (-11.7%). According to the Laredo Morning Times (June 2025), delays in expanding international bridges have led to congestion, productivity losses, and a decline in Laredo's market share, which likely contributed to the port's sharp drop in commercial crossings.⁵ In contrast, the Bridge of the Americas (BOTA) was the only PoE to record year-over-year (YoY) growth, with an increase of 2,621 crossings (5.1%) between January and August 2025.

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

Port of Entry	A 2024 Jan- Apr	B 2025 Jan-Apr	Share (%)	B-A	B-A (Δ%)
1. Laredo	3,338,638	2,946,742	47.2%	-391,896	-11.7%
2. Otay Mesa	970,065	815,510	13.1%	-154,555	-15.9%
3. Hidalgo	689,687	606,668	9.7%	-83,019	-12.0%
4. Ysleta	516,663	449,629	7.2%	-67,034	-13.0%
5. Nogales	408,634	349,320	5.6%	-59,314	-14.5%
6. Calxico East	350,836	301,572	4.8%	-49,264	-14.0%
7. Eagle Pass	195,873	170,529	2.7%	-25,344	-12.9%
8. Brownsville	211,310	124,466	2.0%	-86,844	-41.1%
9. Santa Teresa	132,155	112,038	1.8%	-20,117	-15.2%
10. Del Rio	68,445	59,618	1.0%	-8,827	-12.9%
12. BOTA	51,862	54,483	0.9%	2,621	15.1%
Total Top Ten	6,882,306	5,936,092	95.1%	-946,214	-13.7%
Total U.S.-MX	7,233,295	6,244,194	100.0%	-989,101	-13.7%

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

4 Commercial border crossings include total loaded truck containers.
5 We Waited Too Long: Laredo to Develop Plan for International Bridge Expansions," Laredo Morning Times, June 2025. <https://www.lmtonline.com/local/article/south-texas-webb-county-border-capacity-initiative-20365505.php>

Noncommercial crossings through the top ten PoEs increased by 443,312 crossings (0.5%) from January to August 2025 compared to the previous year.⁶ In the first eight months of 2025, the San Ysidro and BOTA PoEs accounted for 18.0% and 10.1% of all U.S.–Mexico noncommercial crossings, respectively. These two PoEs also experienced sizable increases in their noncommercial crossings relative to the previous year, with 599,160 additional crossings (2.9%) in San Ysidro and 573,097 additional crossings (5.0%) in BOTA.

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

Port of Entry	A 2024 Jan-Aug	B 2025 Jan-Aug	Share (%)	B-A	B-A (Δ%)
1. San Ysidro	20,706,558	21,305,718	18.0%	599,160	2.9%
2. BOTA	11,349,684	11,922,781	10.1%	573,097	5.0%
3. Laredo	9,038,911	9,009,482	7.6%	-29,429	-0.3%
4. Otay Mesa	8,739,150	9,050,742	7.7%	311,592	3.6%
5. Hidalgo	8,150,491	6,838,989	5.8%	-1,311,502	-16.1%
6. Brownsville	8,033,924	7,451,922	6.3%	-582,002	-7.2%
7. Calexico	7,548,387	7,914,136	6.7%	365,749	4.8%
8. Nogales	7,105,823	7,037,076	6.0%	-68,747	-1.0%
9. San Luis	5,261,241	5,449,806	4.6%	188,565	3.6%
10. Ysleta	5,108,245	5,505,074	4.7%	396,829	7.8%
20. Santa Teresa	1,229,074	1,001,166	0.8%	-277,908	-18.5%
Total Top Ten	91,042,414	91,485,726	77.5%	443,312	0.5%
Total U.S.-MX	118,565,096	118,565,096	100.0%	-475,330	-0.4%

Note: Top ten ports based on 2025 traffic. Numbers are for total passengers and pedestrians. BOTA stands for Bridge of the Americas.

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

Sales Tax Collection

Sales Tax Collection Continues to Rise in 2025

Sales tax collections overall increased across selected Texas cities in the first eight months of 2025 compared to the same period in 2024, suggesting a possible growth in consumer spending; however, it is important to note that inflationary pressures could have also influenced this increase.⁷

During the first eight months of 2025, sales and use tax collections in selected Texas cities totaled \$1.8 billion, marking an increase of \$78.2 million (4.5%) compared to the same period in 2024. During the same period, the cities of Houston and Dallas experienced the fastest increase at 8.2% and 7.4%, respectively. Fort Worth, Laredo, McAllen, El Paso, and San Antonio followed with growth rates of 4.7%, 4.1%, 1.6%, 1.3%, and 0.7%, respectively.

⁶ Noncommercial border crossings include pedestrians as well as personal vehicles, bus, and train passengers.

⁷ 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).

While generating total sales and use tax allocations of \$229.7 million during this period, Austin experienced a decline of \$2.7 million (-1.2%) from the same period in 2024. Austin was the only selected city to experience a decline in total and relative growth during this period.

Within the first eight months of 2025, El Paso collected approximately \$88.8 million in sales and use tax allocations, reflecting an increase of \$1.15 million (1.3%) compared to the same period last year; however, this increase is consistent with the growth experienced from 2023 to 2024 (\$1.11 million or 1.3%), reflecting steady, moderate growth during the specified period.

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

City	A 2024 Jan-Aug	B 2025 Jan-Aug	B-A	B-A (Δ%)
Houston, TX	\$579,858,974	\$627,250,496	\$47,391,523	8.2%
San Antonio, TX	\$320,193,515	\$322,594,677	\$2,401,161	0.7%
Dallas, TX	\$271,377,654	\$291,462,676	\$20,085,022	7.4%
Austin, TX	\$232,350,672	\$229,669,564	-\$2,681,108	-1.2%
Fort Worth, TX	\$152,445,384	\$159,580,738	\$7,135,354	4.7%
El Paso, TX	\$87,630,051	\$88,782,071	\$1,152,021	1.3%
McAllen, TX	\$62,002,285	\$63,013,230	\$1,010,945	1.6%
Laredo, TX	\$42,018,689	\$43,734,052	\$1,715,364	4.1%

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:

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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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