

PASO DEL NORTE ECONOMIC INDICATOR REVIEW

September 2026

Key Takeaways

Employment

- From July 2025 to July 2026, non-farm employment in El Paso and Las Cruces increased by 7,900 jobs (2.2%) and 2,700 jobs (3.4%), respectively.
- In July 2026, Ciudad Juárez experienced its 34th consecutive month of declining employment, with a loss of 13,676 jobs (-2.8%).
- Manufacturing employment growth in the region exhibited mixed growth from July 2025 to July 2026: El Paso gained 900 jobs (5.1%) and Las Cruces gained 100 jobs (3.1%), while Ciudad Juárez lost 14,260 jobs (-4.7%).

Bankruptcies

- San Antonio had the highest number of bankruptcy filings among the four selected cities, with 2,470 filings between January and August 2026, an increase of 430 filings (21.1%) compared to the equivalent period in 2025.¹
- Bankruptcy filings in El Paso illustrated the lowest percentage increase among the selected cities when comparing January to August 2026 to the same period in 2025, with a 94-filing increase (8.4%), totaling 1,212 bankruptcy cases between January and August of 2026.

Building Permits

- From January to July 2026, the number of new, privately owned, single-unit building permits per 100,000 inhabitants decreased from 2025 levels across the selected MSAs, with the exception of El Paso.² The El Paso MSA experienced an increase of 1 permit (0.7%) during this period.
- The majority of the selected MSAs experienced an increase in the average price of building units for new, privately owned, single-unit housing within the equivalent comparison period, except for Dallas, Austin, and San Antonio.
- Laredo recorded the largest YoY increase in the average price for new housing units between January and July 2026, by approximately \$81,000 (28.7%) from 2025 levels.

Employment

Mixed Growth in the Paso del Norte Region Manufacturing Non-farm Employment

El Paso and Las Cruces experienced a YoY increase in total non-farm employment between July 2025 and July 2026, while Ciudad Juárez continued to experience losses.

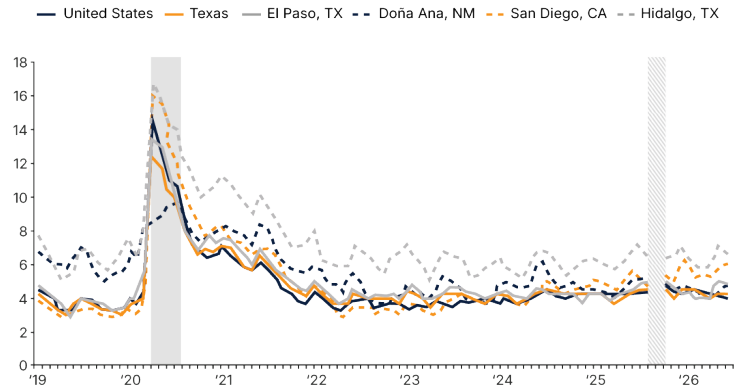
Nationally, the U.S. added 459,000 non-farm jobs (0.3%) in July 2026 on a YoY basis. During the same period, El Paso and Las Cruces experienced YoY gains of 7,900 jobs (2.2%) and 2,700 jobs (3.4%), respectively. Meanwhile, Ciudad Juárez reported a loss of 13,676 jobs (-2.8%), marking the 34th consecutive month of YoY non-farm job losses. These losses are primarily driven by a decline in the city's manufacturing sector, which lost approximately 14,260 jobs (-4.7%) during this period.

¹ Selected Texas cities include Austin, TX; El Paso, TX; Midland, TX; and San Antonio, TX.

² The selected Metropolitan Statistical Areas (MSAs) are Austin-Round Rock-Georgetown, TX; Dallas-Fort Worth-Arlington, TX; El Paso, TX; Houston-The Woodlands-Sugar Land, TX; Laredo, TX; Las Cruces, NM; and San Antonio-New Braunfels, TX.

Quick-Glance Indicators

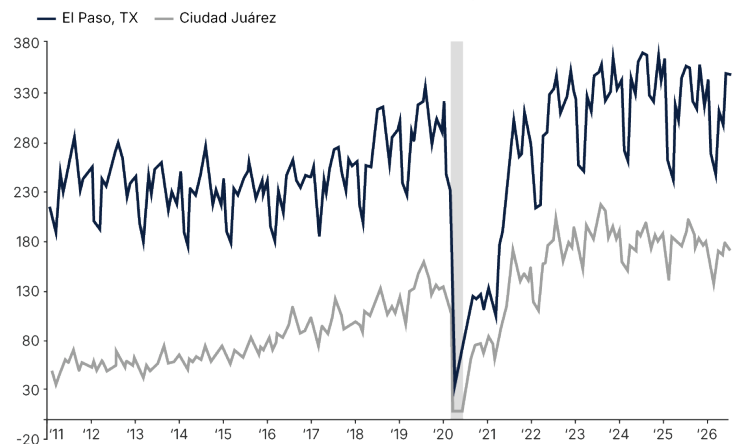
Unemployment Rates for U.S., State, and Selected MSA Economies



Note: Data as of July 2026. The data for October 2025 is unavailable due to the 2025 lapse in appropriations. The shaded area indicates 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 July).

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

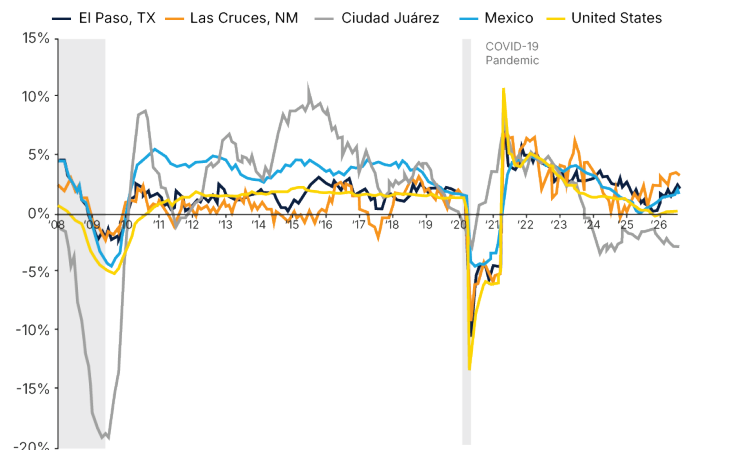
El Paso and Ciudad Juárez Air Passengers, Thousands



Note: Data as of June 2026. 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 (YoY, %)



Note: Preliminary data for July 2026. The shaded area indicates 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 July).

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

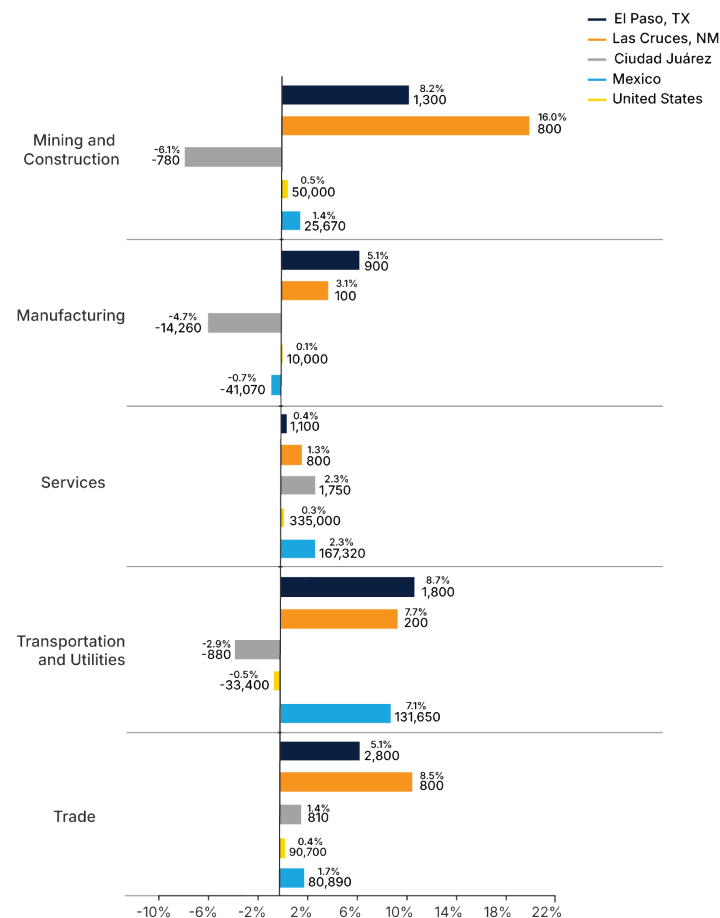
PASO DEL NORTE ECONOMIC INDICATOR REVIEW

September 2026



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 July 2025 to July 2026: trade grew by 2,800 jobs (5.1%); transportation and utilities by 1,800 jobs (8.7%); mining and construction by 1,300 jobs (8.2%); services with 1,100 jobs (0.4%); and manufacturing by 900 jobs (5.1%). Las Cruces registered growth in all five sectors: services by 800 jobs (1.3%); mining and construction by 800 jobs (16.0%); trade by 800 jobs (8.5%); transportation and utilities by 200 jobs (7.7%); and manufacturing by 100 jobs (3.1%).

Paso del Norte Total Non-farm Employment by Sector, July 2026 (YoY)



Note: Preliminary data for July 2026. Services exclude Transportation and Utilities, and Trade. Beginning July 1, 2025, IMSS began incorporating digital platform workers under the new pilot rules, leading to a sharp increase in the transportation and utilities sector.
Source: Hunt Institute calculations using data from the U.S. Bureau of Labor Statistics and Instituto Mexicano del Seguro Social.

Bankruptcies El Paso Bankruptcy Growth Rate Lags Other Texas Cities

El Paso reported the smallest percentage increase in bankruptcy filings among the selected cities between January and August 2026.³

Between January and August 2026, the El Paso Office of the Western District of Texas Bankruptcy Court recorded 1,212 individual and business-related filings, including Chapter 7, Chapter 11, and Chapter 13 cases, representing the smallest percentage increase among the four selected cities, with a growth of 94 filings (8.4%) when compared to the same period in 2025.

San Antonio reported the highest overall volume of bankruptcy filings among the selected cities in the Western District of Texas, United States Bankruptcy Court, with 2,470 filings between January and August 2026, reflecting an increase of 430 filings (21.1%) relative to the corresponding period in 2025. Austin, positioned second of the four selected cities, reported 1,747 bankruptcy filings between January and August of 2026, up 381 filings (27.9%) from the same period in 2025.

Conversely, despite reporting the lowest number of bankruptcies, with 223 filings between January and August of 2026, Midland experienced the greatest percentage growth among the selected cities in the Western District of Texas, with an increase of 82 filings (58.2%) compared to the same period in 2025.

Total Bankruptcy Filings in
Austin, El Paso, Midland, and San Antonio (YoY)

City	A 2025 Jan-Aug	B 2026 Jan-Aug	B-A	B-A (Δ%)
San Antonio, TX	2,040	2,470	430	21.1%
Austin, TX	1,366	1,747	381	27.9%
El Paso, TX	1,118	1,212	94	8.4%
Midland, TX	141	223	82	58.2%

Note: Numbers include Chapter 7, Chapter 11, and Chapter 13 cases for the El Paso Office of the Western District of Texas U.S. Bankruptcy Court.
Source: Hunt Institute using data from the Western District of Texas U.S. Bankruptcy Court.

³ Selected Texas cities include Austin, TX; El Paso, TX; Midland, TX; and San Antonio, TX.



PASO DEL NORTE ECONOMIC INDICATOR REVIEW

September 2026



New Building Permits

El Paso: The Only MSA to Demonstrate an Increase in YoY New Residential Building Permits Issued

From January to July 2026, apart from El Paso, the remaining MSAs recorded declines in private residential building permits issued, while the majority experienced an increase in the average price of building units for new, privately owned, single-unit housing compared to the same period in 2025.

New, privately owned, single-unit building permits are used to assess residential building development in El Paso, Texas, and Las Cruces, New Mexico, as well as other selected MSAs in Texas.⁴ The number of building permits per 100,000 inhabitants is used to account for population differences across MSAs. Among the selected MSAs, El Paso reported the only increase in permits from January to July 2026 compared with the same period in 2025, up 1 permit (0.7%). Conversely, Laredo experienced the largest decrease within the same comparison period, declining by 27 permits (-11.2%), followed by Houston with 19 permits (-5.0%), Las Cruces with 10 permits (-4.7%), Dallas with 10 permits (-3.3%), and San Antonio, which recorded a decline of 7 permits (-3.1%). Although leading the total number of permits amongst the selected MSAs, with 366 permits between January and July 2026, Austin recorded a decrease of 9 permits (-2.4%) when compared with January to July 2025.

Building Permits for New, Privately Owned, Single-Unit Housing in Selected MSAs per 100,000 Inhabitants

MSA	A Jan-Jul 2025	B Jan-Jul 2026	B-A	B-A (Δ%)
Austin, TX	375	366	-9	-2.4%
Houston, TX	377	358	-19	-5.0%
Dallas-Fort Worth, TX	305	295	-10	-3.3%
Laredo, TX	238	211	-27	-11.2%
San Antonio, TX	212	206	-7	-3.1%
Las Cruces, NM	203	194	-10	-4.7%
El Paso, TX	134	135	1	0.7%

Note: Authorized unadjusted units by Metropolitan Statistical Area (MSA). Austin includes Round Rock Georgetown, Dallas-Fort Worth includes Arlington, Houston includes The Woodlands-Sugar Land and San Antonio includes New Braunfels. The number of building permits issued per 100,000 inhabitants is rounded to the nearest whole number. The percentage change may differ slightly as a result.
Source: Hunt Institute calculations using data from the U.S. Census Bureau.

From January to July 2026, the majority of the selected MSAs recorded increases in the average price of building units for new, privately owned, single-unit housing, compared with the same period in the previous year. Laredo reported the largest average price and YoY increase amongst the selected MSAs, with an average price of approximately \$363,000 between January and July 2026, an increase of \$81,000 (28.7%) from the same period in 2025. El Paso recorded an average price of building units of approximately \$250,000 between January and July 2026, a YoY increase of \$13,000 (5.7%) in comparison to the equivalent period in 2025.

Conversely, San Antonio recorded the lowest average price for new, privately owned, single-unit housing, at approximately \$237,000. Furthermore, this MSA also experienced the greatest YoY decline in average price for new housing units during the recurring comparison period, with a decrease of \$45,000 (-16.0%).

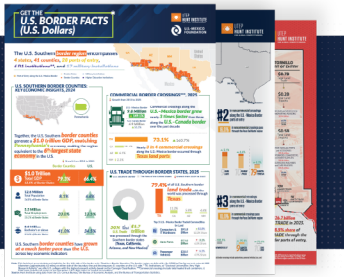
Average Price of Building Units for New, Privately Owned, Single-Unit Housing in Selected MSAs (USD Thousand)

MSA	A Jan-Jul 2025	B Jan-Jul 2026	B-A	B-A (Δ%)
Laredo, TX	\$282	\$363	\$81	28.7%
Houston, TX	\$297	\$309	\$11	3.8%
Dallas-Fort Worth, TX	\$302	\$288	-\$14	-4.6%
Austin, TX	\$308	\$286	-\$22	-7.2%
Las Cruces, NM	\$274	\$278	\$4	1.6%
El Paso, TX	\$236	\$250	\$13	5.7%
San Antonio, TX	\$283	\$237	-\$45	-16.0%

Note: Authorized unadjusted units by Metropolitan Statistical Area (MSA). Austin includes Round Rock Georgetown, Dallas-Fort Worth includes Arlington, Houston includes The Woodlands-Sugar Land and San Antonio includes New Braunfels. The number of building permits issued per 100,000 inhabitants is rounded to the nearest whole number. The percentage change may differ slightly as a result.
Source: Hunt Institute calculations using data from the U.S. Census Bureau.

Paso del Norte Economic Insights:

Access Our Factsheets On Regional Trade & Economic Indicators
Read the Latest Factsheets!



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

4 The selected MSAs are Austin-Round Rock-Georgetown, TX; Dallas-Fort Worth-Arlington, TX; El Paso, TX; Houston-The Woodlands-Sugar Land, TX; Laredo, TX; Las Cruces, NM; and San Antonio-New Braunfels, TX