

Key Takeaways

Employment

- From April 2025 to April 2026, non-farm employment in El Paso and Las Cruces increased by 5,700 jobs (1.6%) and 2,500 jobs (3.0%), respectively.
- In April 2026, Ciudad Juárez experienced its 31st consecutive month of declining employment, with a loss of 11,233 jobs (-2.3%).
- Manufacturing employment growth in the region remained mixed from April 2025 to April 2026: El Paso gained 500 jobs (2.8%), Las Cruces remained stagnant (0.0%), and Ciudad Juárez lost 13,140 jobs (-4.3%).

Border Encounters

- From January to April 2026, total national border encounters decreased by 35.7% from the same period in 2025.
- Southwest border encounters also declined by 43.6% during the same time period, falling from approximately 53,009 to 29,890 encounters.
- Over the January through April 2026 period, all sectors along the Southwest border, apart from the Laredo Sector, experienced a decline in border encounters compared with the same period in 2025.¹ Moreover, border encounters with nationals of almost all countries at the Southwest border declined significantly during this period, except for Haiti.

Average Truck Value

- From January to March 2026, the average value per truck crossing the U.S.-Mexico border experienced an increase of \$5,071 (9.7%) compared to the same period in 2025.
- The average value per truck for the Paso del Norte region reached \$108,370 in the January to March 2026 period. This represents a Year-over-Year (YoY) increase of \$12,390 (12.9%).
- The Tornillo, Santa Teresa, and Ysleta Ports of Entry (PoEs) were the top three PoEs in terms of average value per truck during this period.

Employment

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

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

Nationally, the U.S. added 327,000 non-farm jobs (0.2%) in April 2026 on a YoY basis. During the same period, El Paso and Las Cruces experienced YoY gains of 5,700 jobs (1.6%) and 2,500 jobs (3.0%), respectively. Meanwhile, Ciudad Juárez reported a loss of 11,233 jobs (-2.3%), marking the 31st 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 13,140 jobs (-4.3%) during this period.

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.

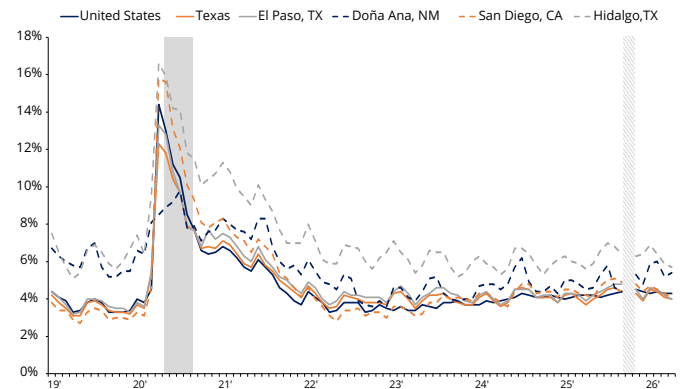
Quick-Glance Indicators

Average Number of Active IMMEX Programs, January to April

Region	A 2019	B 2025	C 2026	C-A (Δ)	C-B (Δ)	Share (%) 2025
Ciudad Juárez	331	326	332	2	6	6.4%
Nuevo Laredo	35	32	34	-1	2	0.7%
Reynosa	152	155	154	2	-1	2.9%
Tijuana	604	604	592	-12	-12	11.6%
National	5,124	5,220	5,221	97	1	100.0%

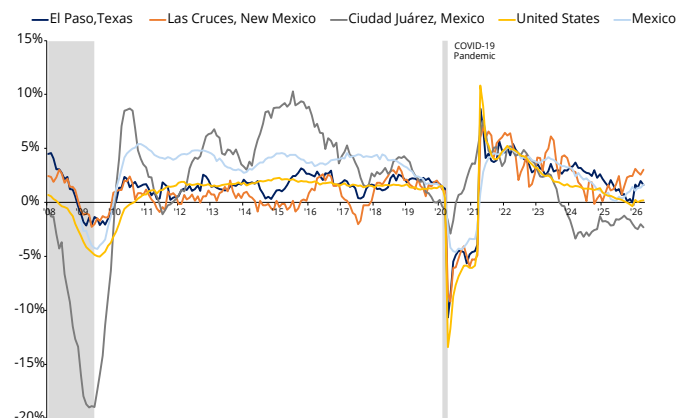
Note: IMMEX stands for Industria Manufacturera, Maquiladora y de Servicios de Exportación, a Mexican program allowing companies to temporarily import inputs tax-free for manufacturing exports.
Source: The Hunt Institute using data from INEGI.

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



Note: Data as of April 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 2020 recession began in February and ended in April).
Source: Hunt Institute calculations using U.S. Bureau of Labor Statistics data.

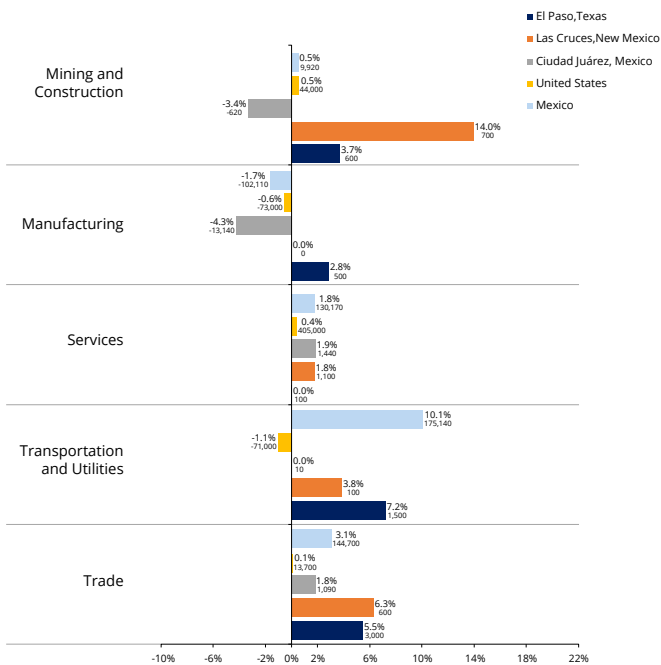
Paso del Norte Total Non-farm Employment by Sector (YoY, %)



Note: Preliminary data for April 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 the U.S. Bureau of Labor Statistics and Instituto Mexicano del Seguro Social.

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 April 2025 to April 2026: trade grew by 3,000 jobs (5.5%); transportation and utilities by 1,500 jobs (7.2%); mining and construction by 600 jobs (3.7%); manufacturing by 500 jobs (2.8%); and services with 100 jobs (0.0%). Las Cruces registered growth in four out of the five sectors: services by 1,100 jobs (1.8%); mining and construction by 700 jobs (14.0%); trade by 600 jobs (6.3%); and transportation and utilities by 100 jobs (3.8%). Meanwhile, the manufacturing sector's employment remained unchanged (0.0%).

Paso del Norte Total Non-farm Employment by Sector, April 2026 (Year-over-Year)



Note: Preliminary data for April 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.

Border Encounters

Border Encounters Decline Nationwide and Along the Southwest Border

From January to April 2026, total national border encounters declined by 35.7% compared to the same period in 2025, while Southwest border encounters fell by 43.6%.

All sectors of the Southwest border, apart from Laredo Sector, experienced a decline in border encounters from January to April 2026 compared to the same period in 2025. The San Diego, Yuma, and El Paso sectors recorded the largest relative decreases in encounters, at 66.3%, 55.9%, and 51.5%, respectively. In contrast, the Laredo sector was the only one to register an increase in encounters, at 13.9%. This sharp drop in Southwest border encounters during the period January through April 2026 coincided with significant

changes in U.S. border policy. The Department of Homeland Security (DHS) attributes the decline to stricter immigration enforcement, including the end of catch-and-release practices and twelve consecutive months of zero releases from Border Patrol custody, alongside broader border security measures.²

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).³ Over the period January to April 2026, 90.3% of encounters at the Southwest border involved single adults, 6.8% involved unaccompanied children, and 2.9% involved family units.

Southwest Border encounters by citizenship also dropped significantly over this time. Encounters with Turkish nationals dropped by 90.9%, making the largest percentage decline among all nationalities. Additionally, encounters with Indian citizens declined by 86.3%.

From January to April 2026, encounters with Mexican citizens decreased by 4,931 encounters (-18.6%) compared to the same period in 2025.

Southwest Border Encounters by Sector

Sector	2026 (Jan-Apr)			Total		B-A	B-A (Δ%)
	FMU	SA	UC	A Jan-Apr 2025	B Jan-Apr 2026		
Big Bend, TX	15	615	25	1,076	655	-421	-39.1%
Del Rio, TX	86	2,908	148	6,339	3,142	-3,197	-50.4%
El Centro, CA	36	805	17	907	858	-49	-5.4%
El Paso, TX	120	4,673	327	10,566	5,120	-5,446	-51.5%
Laredo, TX	77	4,020	375	3,925	4,472	547	13.9%
Rio Grande, TX	206	5,460	565	9,697	6,231	-3,466	-35.7%
San Diego, CA	168	3,201	187	10,551	3,556	-6,995	-66.3%
Tucson, AZ	138	4,686	373	8,453	5,197	-3,256	-38.5%
Yuma, AZ	12	626	21	1,495	659	-836	-55.9%
Southwest Border Total	858	26,994	2,038	53,009	29,890	-23,119	-43.6%
National Total	993	33,938	2,075	57,568	37,006	-20,562	-35.7%

Note: Numbers are by calendar year; USBP reports by fiscal year that goes 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.

² U.S. Department of Homeland Security, "Trump Administration Delivers a Full Year of Zero Releases at Border," May 15, 2026, <https://www.dhs.gov/news/2026/05/15/trump-administration-delivers-full-year-zero-releases-border>

³ Title 8 Apprehensions refers to the physical control or temporary detainment 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-Apr 2025	B Jan-Apr 2026	B-A	B-A (Δ%)
Brazil	546	113	-433	-79.3%
China	693	172	-521	-75.2%
Colombia	2,003	396	-1,607	-80.2%
Cuba	1,179	299	-880	-74.6%
Ecuador	1,659	489	-1,170	-70.5%
El Salvador	1,544	637	-907	-58.7%
Guatemala	6,301	2,789	-3,512	-55.7%
Haiti	24	34	10	41.7%
Honduras	3,459	1,820	-1,639	-47.4%
India	1,065	146	-919	-86.3%
Mexico	26,532	21,601	-4,931	-18.6%
Nicaragua	335	223	-112	-33.4%
Other	3,794	465	-3,329	-87.7%
Peru	572	122	-450	-78.7%
Romania	36	30	-6	-16.7%
Russia	89	25	-64	-71.9%
Turkey	481	44	-437	-90.9%
Venezuela	2,690	477	-2,213	-82.3%

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.

Average Truck Value

Average Value per Truck in the Paso del Norte Region Increased in 2026

The Paso del Norte Region ports of entry had the highest average value per truck at the U.S.-Mexico border during the January to March 2026 period.

The Hunt Institute tracks the average value per truck for all U.S.-Mexico land ports of entry. Between January and March 2026, the average value per truck crossing the U.S.-Mexico border reached \$57,613, up by \$5,071 (9.7%) YoY from the same period in 2025.

Between January and March 2026, the total truck crossing through the Paso del Norte PoEs had an average value of \$108,370, almost doubling that of the rest of the U.S.-Mexico ports. Comparing January to March 2026 to the same period in 2025, the Paso del Norte PoEs' average truck value increased by \$12,390 (12.9%). During the same period, three of the four Paso del Norte region PoEs were within the top ten land ports within the U.S.-Mexico PoEs in terms of average value of truck: Tornillo with \$206,539; Santa Teresa with \$142,089; and Ysleta with \$118,743.

The Tornillo PoE had the largest YoY increase in average value during the January to March 2026 period, growing by \$125,745 (155.6%). The growth in average value per truck during this period in the Tornillo PoE is explained by increased trade in computer-related machinery and parts, furniture, and measuring and testing instruments.

Top Ten U.S.-Mexico Border Ports of Entry for Average Value per Truck, USD

Port of Entry	A Jan-Mar 2025	B Jan-Mar 2026	B-A	B-A (Δ%)
Tornillo, TX	\$80,795	\$206,539	\$125,745	155.6%
Santa Teresa, NM	\$150,697	\$142,089	-\$8,607	-5.7%
Ysleta, TX	\$102,526	\$118,743	\$16,218	15.8%
Douglas, AZ	\$49,194	\$77,364	\$28,170	57.3%
Laredo, TX	\$62,028	\$72,389	\$10,361	16.7%
Del Rio, TX	\$41,869	\$43,004	\$1,135	2.7%
Hidalgo, TX	\$42,800	\$40,475	-\$2,325	-5.4%
Otay Mesa, CA	\$37,232	\$38,574	\$1,342	3.6%
Nogales, AZ	\$38,794	\$37,353	-\$1,440	-3.7%
Calexico-East, CA	\$26,090	\$24,774	-\$1,315	-5.0%
BOTA, TX	\$15,029	\$16,838	\$1,810	12.0%
Paso del Norte (Ports)	\$95,980	\$108,370	\$12,390	12.9%
U.S.-Mexico Border (Ports)	\$52,542	\$57,613	\$5,071	9.7%

Note: Top ten ports based on 2026. BOTA stands for Bridge of the Americas.

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

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

Mission Trail Roundtables: Join the Conversation!

Be part of a collaborative roundtable with community members, business owners, and visitors working to shape the future of the Mission Trail.

Help turn local insight into meaningful action.



July 9th | 9 am - 11 am
Rio Vista Community Center
901 N. Rio Vista Rd., Socorro, TX 79927
Pan dulce and coffee will be provided

July 16th | 9 am - 11 am
Mi Casa Art Center
1456 Main St. San Elizario, TX 79849
Pan dulce and coffee will be provided

July 23rd | 9 am - 11 am
Mission Valley Visitors Center
9065 Alameda Ave., El Paso, TX 79907
Pan dulce and coffee will be provided

CLICK HERE TO RSVP

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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