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Good, bad, and ugly jobs report

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The top-line numbers of the jobs report released Tuesday are mixed. The 64,000 jobs added in November beat the 40,000 expected, but they came on the heels of a net loss of 105,000 jobs in October, which were due to scheduled buyouts of 162,000 federal government workers that month. The unemployment rate also inched up to 4.6% last month, demonstrating that this is not a completely healthy economy.



Beneath the top-line numbers, however, is a more chaotic picture of short-term pain, but perhaps longterm gain. After a decade of growth, both the federal and the foreign-born workforces are shrinking. This is not a bug but a feature of President Donald Trump's policies. So is the fact that the private sector and native-born workforce are thriving.

More than 270,000 jobs have been shed by the federal government since January, leading to a workforce that is now smaller than it has been since 2014. We want the federal workforce reduced — that's what conservatives should want, for it means Washington is being at least marginally trimmed back and removed from areas of our

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lives that it should never have been in the first place. Meanwhile, the private sector has added almost 700,000 jobs over the same time frame. This is strong but not record growth.

More importantly, the people getting private sector jobs today are different from those who profited under President Joe Biden. Since the economy fully recovered from COVID-19 lockdowns in the summer of 2022, through the last month of the Biden presidency, households reported gaining about 3 million jobs, of which more than 2 million went to foreign-born workers. Native-born workers gained fewer than 1 million.

Under Trump, however, the number of foreign-born workers with jobs has fallen by more than 1 million, while the number of native-born citizens reporting employment has increased by more than 2 million. The White House announced on Tuesday that more than 600,000 illegal immigrants have been deported since Trump took office, and another 1.9 million have voluntarily left the country by self-

deporting. The White House did not offer a breakdown of the ages of those illegal immigrants, but it is safe to say that most are working age, meaning the size of the foreign-born workforce has shrunk dramatically.

The overall size of the civilian workforce has not shrunk. In fact, it has grown by more than 500,000. This means that more Americans who were sitting on the sidelines, not working, are now joining the labor force due to higher pay and better opportunities becoming available to them as foreign-born workers leave.

That is good news, but other parts of the report show signs of danger. While the construction sector added 28,000 jobs, manufacturing and transportation continued to lose jobs. This weakness is almost certainly due to Trump's tariff regime, which has increased costs for manufacturers and decreased demand for transportation.

The marked decrease in the federal workforce is a good sign, as is the decrease in the foreign-born workforce and the strong job growth for U.S. workers. But the churn between departing foreign workers and government workers losing their jobs is painful. And the chaos caused by the government shutdown and Trump's tariffs isn't helping.

What the economy needs is stability and tariff relief. No more shutdowns. No more new federal spending. No innovative tariff tricks to replace Trump's existing tariffs should the Supreme Court strike them down.

Fewer government jobs, more private sector jobs, higher wages, and more jobs for native-born workers are all good things. But those gains will be sustained only if policymakers stop injecting uncertainty into the economy through shutdown brinkmanship and ever-shifting, utterly baffling trade policy. A job market that is working for Americans needs less, not more disruption. It needs predictability.