

Key Takeaways

Employment

- Total non-farm employment increased in November 2022 on a year-over-year basis in the U.S. (4,805,000 jobs, 3.2%), El Paso (5,800 jobs, 1.8%), Las Cruces (3,500 jobs, 4.7%), and Ciudad Juárez (19,000 jobs, 3.9%).
- On a monthly basis, positive changes in total non-farm employment were observed across the Paso del Norte region and the U.S. in November: increasing in the U.S. by 614,000 jobs (0.4%), El Paso by 2,500 jobs (0.8%), and Las Cruces by 200 jobs (0.3%). Ciudad Juárez lost 900 jobs (-0.2%).

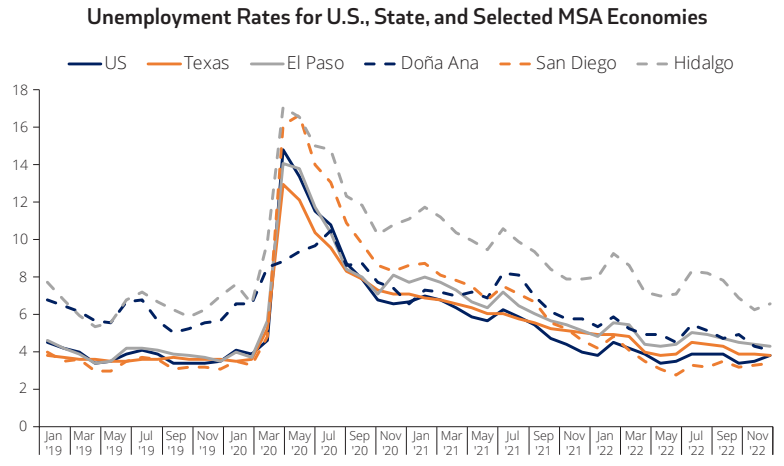
Hotel Occupancy Rates

- Although hotel occupancy rates in selected MSAs recovered significantly since March 2020, they have remained stagnant since October 2021.¹
- Ciudad Juárez was the only selected MSA to show an increase in hotel occupancy rates as of November 2022, compared to the previous year.²

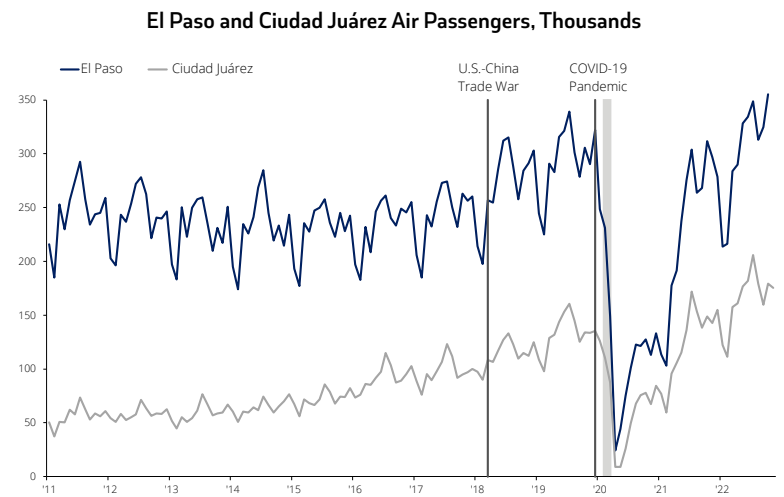
Border Apprehensions

- In 2022 through November, the U.S. Border Patrol reported over 1.1 million apprehensions on the Southwest border, an increase of 60% compared to the same time in 2021.
- Border apprehensions from Cuba, Colombia, and Nicaragua displayed the largest increase in absolute terms compared to 2021.

Quick-Glance Indicators



Note: Data as of November 2022.
Source: Hunt Institute calculations using data from the U.S. Bureau of Labor Statistics.



Note: Data as of November 2022. 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.

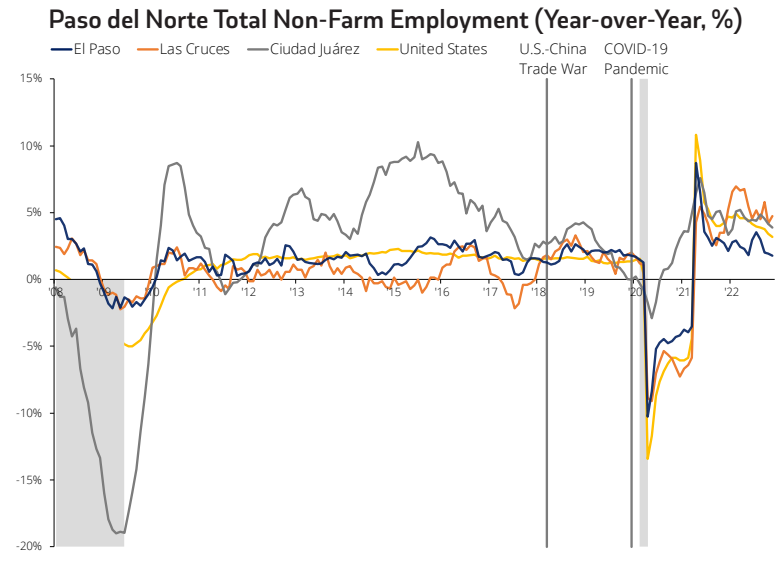
Employment

Post-pandemic Job Growth Still Rising

Non-farm employment in November 2022 for the Paso del Norte region exceeded that of November 2021.

Non-farm employment in November 2022 for the Paso del Norte region exceeded that of November 2021 and marked the twentieth consecutive month of year-over-year non-farm employment gains for El Paso and Las Cruces. Non-farm employment gains continued for the twenty-eighth consecutive month in Ciudad Juárez. The U.S. registered its sixteenth consecutive month of non-farm employment gains.

At the national level, year-over-year gains of 4,805,000 jobs (3.2%) were observed in November 2022. By comparison, total non-farm employment increased in El Paso by 5,800



Note: Preliminary data for November 2022. 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 calculations using data from the U.S. Bureau of Labor Statistics and Instituto Mexicano del Seguro Social.

1 The selected MSAs include El Paso, Las Cruces, Ciudad Juárez, Laredo, McAllen, and San Antonio.
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jobs (1.8%), Las Cruces by 3,500 jobs (4.7%), and Ciudad Juárez by 19,000 jobs (3.9%). In a month-over-month comparison, the U.S. gained 614,000 jobs (0.4%), El Paso gained 2,500 jobs (0.8%), and Las Cruces gained 200 jobs (0.3%). Ciudad Juárez lost 900 jobs (-0.2%).

The Hunt Institute tracks five non-farm employment sectors in the Paso del Norte region. El Paso exhibited job growth in three out of the five sectors on a year-over-year basis for November 2022, while Las Cruces experienced growth in two of the five sectors. Ciudad Juárez and the U.S. added jobs in all five sectors. The Services sector drove year-over-year job growth in El Paso, Las Cruces, and the U.S., while the Manufacturing sector drove growth in Ciudad Juárez. In El Paso, the Services sector grew by 4,800 jobs (2.2%), the Transportation and Utilities sector by 1,000 jobs (5.6%), and the Manufacturing sector by 1,200 jobs (7.3%); the Mining and Construction sector decreased by 900 jobs (-4.8%) and the Trade sector by 300 jobs (-0.6%). In Las Cruces, non-farm employment increased in the Services sector by 3,500 jobs (6.3%), and in the Mining and Construction sector by 500 jobs (14.3%); the Trade sector decreased by 500 jobs (-5.4%), while the Transportation and Utilities sector and the Manufacturing sector remained stagnant. Ciudad Juárez recorded increases in all five sectors: 11,800 jobs (3.6%) were added in the Manufacturing sector, 500 jobs (0.9%) in the Trade sector, 3,000 jobs (19.3%) in the Mining and Construction sector, 1,300 jobs (4.9%) in the Transportation and Utilities sector, and 2,400 jobs (3.4%) in the Services sector.

In a month-over-month comparison, El Paso's non-farm employment grew in all sectors. The Services sector increased by 1,000 jobs (0.4%), the Transportation and Utilities sector by 200 jobs (1.1%), the Manufacturing sector by 200 jobs (1.1%), the Mining and Construction sector by 200 jobs (1.1%) and the Trade sector by 900 jobs (1.7%).

Las Cruces exhibited employment growth in two of the five sectors in a month-over-month comparison as the Services sector grew by 200 jobs (0.3%), and the Trade sector gained 100 jobs (1.1%), while the Mining and Construction sector lost 100 jobs (-2.4%). The Transportation and Utilities sector and the Manufacturing sector remained stagnant.

Ciudad Juárez demonstrated moderate job gains in all but one of the five sectors in a month-over-month comparison. Mining and Construction increased by 200 jobs (1.1%), the Services sector by 200 jobs (0.3%), the Transportation and Utilities sector by jobs (0.3%), and the Trade sector gained 300 jobs (0.6%). The Manufacturing sector decreased by 1,700 jobs (-0.5%).

Hotel Occupancy Rates

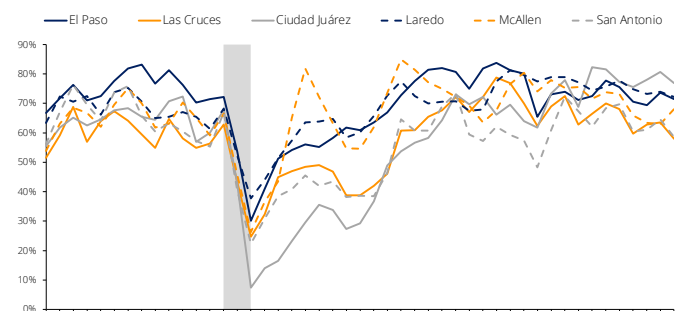
Hotel Occupancy Rates Decreased for Selected MSAs

Ciudad Juárez had the highest hotel occupancy rate of all the selected MSAs.

In a comparison of selected cities, the hotel occupancy rates for El Paso and Ciudad Juárez reached their highest level since 2019 in June 2022. For Las Cruces, Laredo, and San Antonio, the highest level was recorded in March 2022. McAllen reached its highest hotel occupancy rate in February 2022.

As of November 2022, Ciudad Juárez had the highest hotel occupancy rate of 77% compared to the other selected cities. El Paso and Laredo both had a hotel occupancy rate of 72%, while McAllen and San Antonio had a hotel occupancy rate of 68% and 59%, respectively. Las Cruces had the lowest hotel occupancy rate with just 58%.

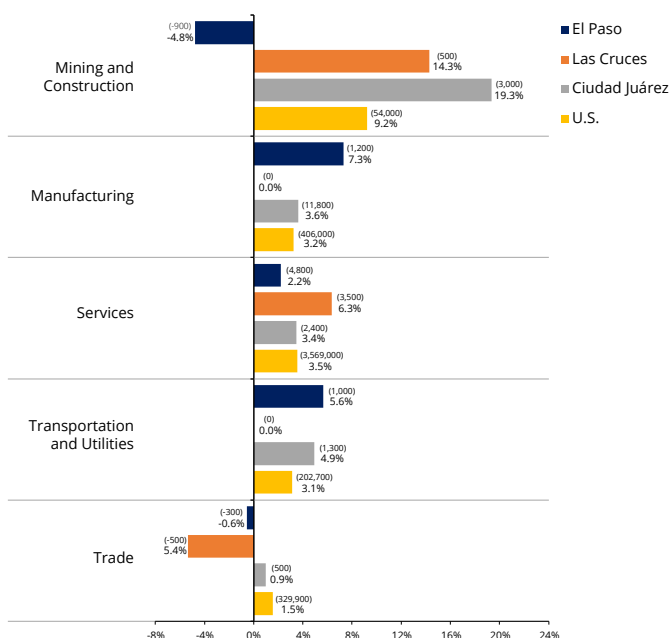
Hotel Occupancy Rates by MSA through November 2022 (Year-over-Year, %)



Note: Data as of November 2022. McAllen includes Edinburg and Mission; San Antonio includes New Braunfels. Shaded area indicates NBER defined recession (2020 recession began in February and ended in April).

Source: Hunt Institute using STR data.

Paso del Norte Total Non-Farm Employment by Sector, November 2022 (Year-over-Year)



Note: Preliminary data for November 2022. Services excludes Transportation and Utilities, and Trade. Numbers are rounded to the nearest hundred.

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

In November 2022, all but one of the selected MSAs exhibited decreases in hotel occupancy rates with the only exception being Ciudad Juárez with an increase of 7 percentage points year-over-year. Las Cruces and El Paso displayed the largest decrease of 19 pp and 10 pp, respectively. Laredo exhibited year-over-year decrease of 9 pp while McAllen exhibited a decrease of 8 pp. San Antonio had the lowest decrease with only 1 pp. When compared to the pre-pandemic levels of 2019, El Paso, McAllen, and San Antonio showed a decrease in hotel occupancy rates of 5 pp, 2 pp, and 2 pp, respectively. Las Cruces did not show any growth with zero percent, while Ciudad Juárez and Laredo both increased by 5 pp.

Border Apprehensions

Southwest Border Apprehensions Continue to Rise in 2022

Southwest Border Apprehensions reached over 1.1 million in 2022 through November, an increase of 60% compared to the same time in 2021.

In 2022 through November, the U.S. Border Patrol reported over 1.1 million apprehensions on the southwest border, up significantly from over 740,000 the same time in 2021. In 2022, 59% (697,475) of these apprehensions were single adult apprehensions, while 30% (351,315) were family unit apprehensions and 11% (135,478) were unaccompanied children apprehensions. Total border apprehensions in the Southwest increased by 60% (444,158) in 2022 through November compared to the previous year. The El Paso Sector displayed the largest percentage increase of 452% (162,519). The El Centro and Del Rio Sectors were second and third with 266% (32,067) and 124% (178,447), respectively. The table below shows border apprehensions by type for all Southwest border sectors.

Southwest Border Apprehensions by Sector

Sector	Jan-Nov 2022			Total		B-A	B-A (Δ%)
	FMU	UC	SA	A Jan-Nov 2021	B Jan-Nov 2022		
Big Bend	626	1,121	5,228	4,565	6,975	2,410	53%
Del Rio	83,947	11,673	226,916	144,089	322,536	178,447	124%
El Centro	14,209	1,365	28,537	12,044	44,111	32,067	266%
El Paso	68,624	24,043	105,778	35,926	198,445	162,519	452%
Laredo	362	3,444	4,832	10,173	8,638	(1,535)	-15%
Rio Grande	49,431	66,259	102,176	334,443	217,866	(116,577)	-35%
San Diego	24,965	4,566	36,952	31,195	66,483	35,288	113%
Tucson	13,617	17,028	33,392	36,577	64,037	27,460	75%
Yuma	95,534	5,979	153,664	131,098	255,177	124,079	95%
Southwest Border Total	351,315	135,478	697,475	740,110	1,184,268	444,158	60%
National Total	352,598	135,610	705,973	742,971	1,194,181	451,210	61%

Note: Numbers in parenthesis indicate negative numbers. Numbers are by calendar years; USBP reports by fiscal year that goes from October to September. FMU are family unit apprehensions, UC are unaccompanied children apprehensions, and SA are single adult apprehensions.

Source: Hunt Institute calculations using data from U.S. Customs and Border Protection.

Border apprehensions involving Cuban citizens experienced the largest increase in levels in 2022 through November, increasing by 217,173 (523%) apprehensions compared to 2021. In percentage terms, apprehensions involving Peruvian citizens increased the most at 1485% (59,851) relative to 2021. The table below shows Southwest border apprehensions by citizenship.

Southwest Border Apprehensions by Citizenship

Citizenship	A Jan-Nov '21	B Jan-Nov'22	B-A	B-A (Δ%)
Cuba	41,525	258,698	217,173	523%
Nicaragua	67,407	177,973	110,566	164%
Venezuela	79,713	145,365	65,652	82%
Colombia	10,888	132,144	121,256	1114%
Mexico	46,052	72,656	26,604	58%
Guatemala	114,812	65,677	(49,135)	-43%
Peru	4,030	63,881	59,851	1485%
Other	17,597	59,013	41,416	235%
Honduras	154,308	52,106	(102,202)	-66%
Ecuador	40,714	38,369	(2,345)	-6%
El Salvador	47,314	28,882	(18,432)	-39%
Brazil	68,227	25,060	(43,167)	-63%
India	3,919	19,962	16,043	409%
Turkey	2,306	16,720	14,414	625%
Haiti	35,926	12,428	(23,498)	-65%
Russia	689	6,630	5,941	862%
Romania	4,150	5,449	1,299	31%
China	449	2,666	2,217	494%
Ukraine	59	556	497	842%
Southwest Border Total	740,085	1,184,235	444,150	60%

Note: Apprehensions involving Canadian, Philippine, and Burmese citizenship were excluded due to availability of data.

Source: Hunt Institute calculations using data from U.S. Customs and Border Protection.

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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