

Key Takeaways

Employment

• Total non-farm employment increased in May 2022 on a year-over-year basis in El Paso (5,900 jobs or 1.9%), Las Cruces (3,600 jobs or 5.0%), and Ciudad Juárez (20,800 jobs or 4.3%).

• On a monthly basis, total non-farm employment across the Paso del Norte region decreased marginally in May, with El Paso losing 200 jobs (-0.06%), Las Cruces decreasing 300 jobs (-0.4%), and Ciudad Juárez declining by 1,100 jobs (-0.2%).

• The Services sector drove year-over-year employment growth in both El Paso and Las Cruces for the second consecutive month.

Remittances

• In the first quarter of 2022, Ciudad Juárez accounted for just over a fifth of the total remittances received in the top ten border cities, second only to Tijuana.¹

• Remittances to Ciudad Juárez increased by \$23 million (28.2%) in the first quarter of 2022 compared 2020

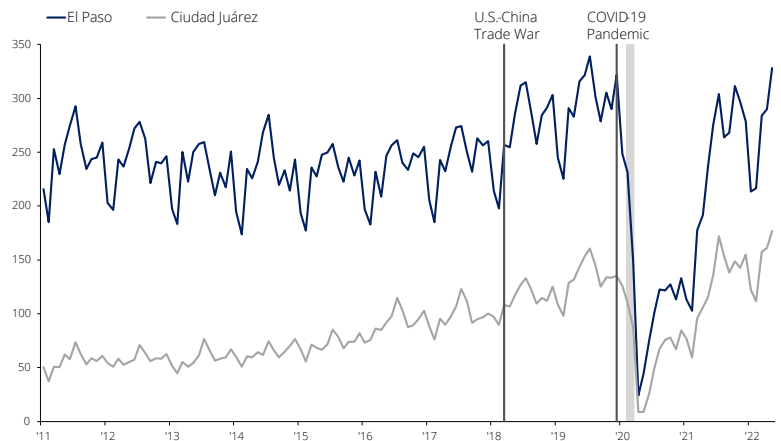
Border Crossings

• During the January through April 2022 period, the border crossings for total passenger and pedestrians through the top ten U.S.-Mexico ports of entry (PoE) increased compared to 2021 levels for the same period, but remained below pre-pandemic levels.²

• The total border crossings for loaded truck containers through the top ten U.S.-Mexico loaded truck containers in January through April of 2022 surpassed 2021 and 2019 levels for the same period.

Quick-Glance Indicators

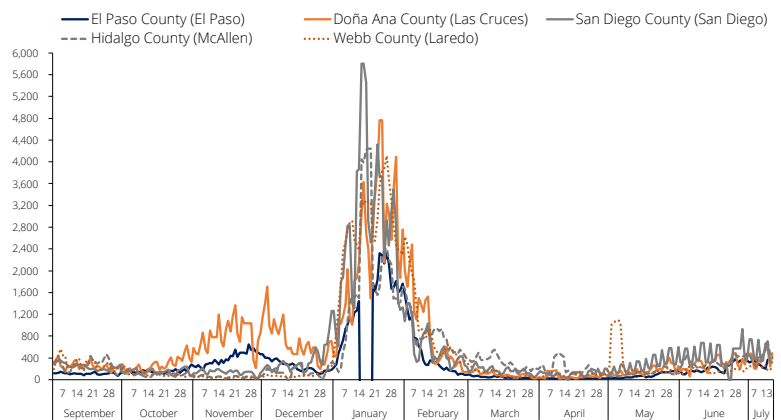
El Paso and Ciudad Juárez Air Passengers, Thousands



Note: Data as of May 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.

New Coronavirus Cases per 1 Million Inhabitants, 5-Day Moving Average



Note: Data as of July 13, 2022.

Source: Hunt Institute calculations using Texas Health and Human Services, New Mexico Department of Health, Center for Systems Science and Engineering at Johns Hopkins University, and U.S. Census Bureau data.

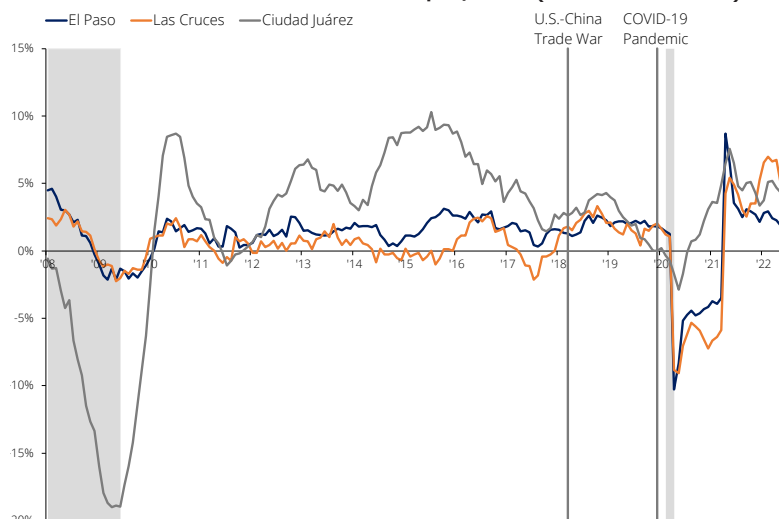
Employment

Post-pandemic Job Growth Keeps Slowing

Non-farm employment in the Paso del Norte region exceeds 2021 but month-over-month growth is stagnant.

May 2022 marked the fourteenth consecutive month of year-over-year non-farm employment gains for El Paso and Las Cruces: El Paso added 5,900 jobs (1.9%) and Las Cruces added 3,600 jobs (5.0%). Non-farm employment gains continued for the twenty-second consecutive month in Ciudad Juárez, with year-over-year job gains of 20,800 jobs (4.3%).

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



Note: Preliminary data for May 2022. Shaded area indicates recession as defined by the National Bureau of Economic Research (2020 recession began in February and ended in April).

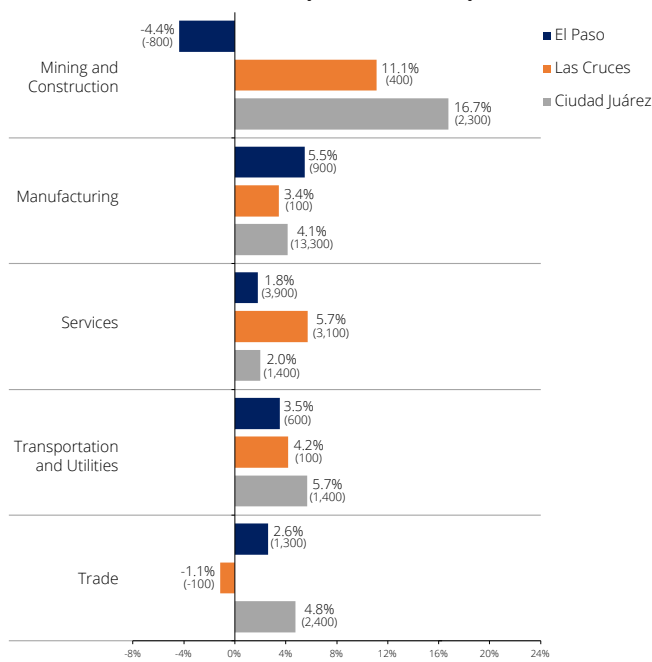
Source: Hunt Institute calculations using data from the U.S. Bureau of Labor Statistics and Instituto Mexicano del Seguro Social.

¹ The top ten border cities include Tijuana, Juárez, Mexicali, Matamoros, Reynosa, Nuevo Laredo, San Luis Rio Colorado, Piedras Negras, Acuña, and Nogales.

² The top ten U.S.-Mexico ports of entry include Laredo, Otay Mesa, Hidalgo, El Paso, Nogales, Calexico-East, Brownsville, Eagle Pass, Santa Teresa, and Del Rio

The Hunt Institute tracks five non-farm employment sectors in the Paso del Norte region. El Paso and Las Cruces exhibited growth in all but one sector in a year-over-year comparison for May 2022. Ciudad Juárez added jobs in all sectors.

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



Note: Preliminary data for May 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.

The services sector drove job growth in El Paso and Las Cruces, while the Manufacturing sector drove growth in Ciudad Juárez. In El Paso the Manufacturing sector grew by 900 jobs (5.5%), Transportation and Utilities by 600 jobs (3.5%), Trade by 1,300 jobs (2.6%), and Services by 3,900 jobs (1.8%) while Mining and Construction decreased by 800 jobs (-4.4%). In Las Cruces, non-farm employment increased in the Services sector by 3,100 jobs (5.7%), Transportation and Utilities by 100 jobs (4.2%), Manufacturing by 100 jobs (3.4%), and Mining and Construction by 400 jobs (11.1%) and decreased in Trade by 100 jobs (-1.1%). Ciudad Juárez recorded increases in all sectors with 2,400 jobs (4.8%) in Trade, 13,300 jobs (4.1%) in Manufacturing, 2,300 jobs (16.7%) in Mining and Construction, 1,400 jobs (4.1%) in Transportation and Utilities, and 1,400 jobs (2.0%) in Services.

El Paso's non-farm employment gains in a month-over-month comparison occurred in two of the five sectors. The Transportation sector gained 200 jobs (1.1%) and the Services sector added 300 jobs (0.1%). El Paso lost jobs in the other employment sectors: Mining by 100 jobs (-0.6%), Transportation and Utilities by 200 (1.1%). The Manufacturing sector remained stagnant.

Las Cruces exhibited zero job growth and decreased in certain sectors. The trade sector decreased by 200 jobs (-2.2%) and the Services sector decreased by 100 (-0.2%). The Mining and Construction, Manufacturing and Transportation and Utilities

sectors showed no job growth. Ciudad Juárez demonstrated moderate job gains in three out of the five sectors. Mining and Construction increased by 130 jobs (0.8%), Transportation and Utilities by 60 jobs (0.2%), and the Services sector by 400 jobs (0.6%). The Manufacturing sector lost 2,800 jobs (-0.8%) and Trade decreased by 150 jobs (-0.3%).

Remittances

Remittances to Mexico Continue to Surge

Remittances to Mexico continue to rise in the first quarter of 2022 and continue to be well above pre pandemic levels.

Growth in total remittances to Mexico in 2022 continued to show an upward trend as Mexico recorded Mexico recorded \$12,522 million in remittances in the first quarter of 2022 compared to \$10,615.4 million recorded in the first quarter of 2021. This is an increase of \$1,906.5 million (15.2%).

Non-border states continued to be the primary recipients of the increased remittances during the first quarter of 2022 compared to the values from 2021 for the same period. Remittances in these states increased by \$1,772.2 million (16.3%) when compared to 2021. Mexico's northern border states received \$134.3 million (8.2%) more in remittances in 2022 than in 2021. Nuevo León registered remittance increases of \$46.9 million (15.2%), the largest year-over-year increase of the border states. Coahuila and Sonora recorded \$36.5 million (16.6%) and \$22.2 million (10.7%) respectively, for the second and third largest year-over year increases.

Remittances to Mexican States, Million USD

Region	A Jan-Mar 2021	B Jan-Mar 2022	B-A	B-A (Δ%)
Border States	\$1,506.2	\$1,640.5	\$134.3	8.2%
Baja California	\$301.2	\$320.8	\$19.6	6.1%
Coahuila	\$183.6	\$220.1	\$36.5	16.6%
Chihuahua	\$338.5	\$345.1	\$6.5	1.9%
Nuevo León	\$262.4	\$309.3	\$46.9	15.2%
Sonora	\$185.2	\$207.4	\$22.2	10.7%
Tamaulipas	\$235.3	\$237.9	\$2.6	1.1%
Non-Border States	\$9,109.3	\$10,881.5	\$1,772.2	16.3%
Mexico	\$10,615.4	\$12,522.0	\$1,906.5	15.2%

Note: Top ten in 2022 on Mexico's northern border.

Source: Hunt Institute calculations using data from Banco de México.

In the January to March 2022 period, Tijuana and Ciudad Juárez accounted for just over half of the total remittances received in the top ten border cities. Remittances to Ciudad Juárez in the first quarter of 2022 decreased slightly by -\$0.2 million (-0.2%) compared to 2021. Acuña had the largest increase in percentage in a year-over-year basis, increasing by \$3.9 million (20.8%). Together, the top ten Mexican border Municipalities in remittance receipts received \$19.0 million (3.6%) more in 2022 than in 2021.

Top Ten Mexican Border Cities in Remittances, Million USD

Municipality	A Jan-Mar 2021	B Jan-Mar 2022	B-A	B-A (Δ%)
Tijuana	\$159.7	\$175.6	\$15.9	9.9%
Ciudad Juárez	\$107.3	\$107.1	\$(0.2)	-0.2%
Mexicali	\$62.6	\$64.3	\$1.8	2.9%
Matamoros	\$43.2	\$39.9	\$(3.3)	-7.7%
Reynosa	\$30.7	\$31.0	\$0.4	1.2%
Nuevo Laredo	\$30.8	\$29.7	\$(1.1)	-3.7%
San Luis Río Colorado	\$26.3	\$26.2	\$(0.1)	-0.3%
Piedras Negras	\$21.4	\$22.7	\$1.3	6.2%
Ciudad Acuña	\$18.6	\$22.4	\$3.9	20.8%
Nogales	\$21.2	\$21.8	\$0.5	2.6%
Total	\$521.8	\$540.8	\$19.0	3.6%

Note: Top ten in 2022 on Mexico's northern border.

Source: Hunt Institute calculations using data from Banco de México.

Border Crossings

Border Crossings Continue to Grow

The total commercial traffic through the top ten ports of entry surpassed 2019 and 2021 for the January through April period in 2022. The total noncommercial traffic for this time period surpassed 2021, but remain below 2019 levels.³

In January through April of 2022, the total border crossings for loaded truck containers at the top ten U.S.-Mexico PoE surpassed both 2019 and 2021 levels for the same time period. Compared to 2019, 2022 exhibited an increase of 78,655 crossings, and an increase of 94,304 crossings compared to 2021.

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

Port of Entry	A Jan-Apr '19	B Jan-Apr '21	C Jan-Apr '22	Share (%)	C-A (Δ%)	C-B (Δ%)
Laredo, TX	568,043	615,827	667,437	39.7%	17.5%	8.4%
Otay Mesa, CA	237,428	250,731	274,175	16.3%	15.5%	9.4%
Hidalgo, TX	164,532	164,023	158,813	9.5%	-3.5%	-3.2%
El Paso, TX	199,273	156,568	158,367	9.4%	-20.5%	1.1%
Nogales, AZ	120,384	114,727	117,002	7.0%	-2.8%	2.0%
Calexico-East, CA	77,453	78,109	80,230	4.8%	3.6%	2.7%
Brownsville, TX	49,988	40,520	47,013	2.8%	-6.0%	16.0%
Eagle Pass, TX	50,399	37,798	44,963	2.7%	-10.8%	19.0%
Santa Teresa, NM	33,768	30,539	34,314	2.0%	1.6%	12.4%
Del Rio, TX	20,573	17,350	18,182	1.1%	-11.6%	4.8%
Total	1,521,841	1,506,192	1,600,496	95.3%	5.2%	6.3%

Note: Top ten ports based on 2021 traffic. Numbers are for loaded container truck crossings. El Paso PoE includes Ysleta PoE.

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

Only four PoEs were able to recover from the decrease caused by the COVID-19 pandemic in 2020 in January through April of 2022. The Laredo PoE exhibited the largest gain compared to 2019 levels with an increase of 99,394 crossings (17.5%), followed by Otay-Mesa at 36,747 crossings (15.5%), Santa Teresa at 546

³ The top ten border cities include Tijuana, Juarez, Mexicali, Matamoros, Reynosa, Nuevo Laredo, San Luis Río Colorado, Piedras Negras, Acuña, and Nogales.

crossings (1.6%), and Calexico-East at 2,777 crossings (3.6%).

Compared to 2021 levels for the same period, all the top ten U.S.-Mexico PoEs except Hidalgo exhibited an increase in commercial border crossings. The Laredo PoE presented the largest gain in border crossings with 51,610 crossings (8.4%), followed by Otay Mesa at 23,444 crossings (9.4%), and El Paso at 1,799 crossings (1.1%).

In January through April of 2022, the total number of crossings through the top ten PoE through the U.S.-Mexico border increased when compared to 2021, but remained below the pre-pandemic levels of 2019. The noncommercial traffic exhibited an overall decrease of -6,675,079 crossings (-13.3%) when compared to 2019 and an increase of 12,748,776 crossings (41.7%) when compared to 2021.

The top ten PoE along the U.S.-Mexico border presented a loss when compared to 2019 during the January through April 2022 period.

In January through April of 2022, all top ten PoEs exhibited an increase when compared to 2021 for the same period. Within the top ten PoEs, El Paso presented the largest gain compared to 2021 with an increase of 2,791,504 crossings (57.1%), followed by San Ysidro with 2,018,009 crossings (24.6%) and Nogales with 1,459,830 crossings (83.2%).

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

Port of Entry	A Jan-Apr '19	B Jan-Apr '21	C Jan-Apr '22	C-A (Δ%)	C-B (Δ%)
San Ysidro, CA	11,305,417	8,195,086	10,213,095	-9.7%	24.6%
El Paso, TX	8,821,134	4,890,394	7,681,898	-12.9%	57.1%
Otay Mesa, CA	4,855,469	3,221,629	3,812,328	-21.5%	18.3%
Calexico, CA	4,189,622	2,783,242	3,388,271	-19.1%	21.7%
Laredo, TX	5,011,038	2,388,726	3,848,430	-23.2%	61.1%
Brownsville, TX	3,999,178	2,081,642	3,166,966	-20.8%	52.1%
Hidalgo, TX	3,683,488	2,028,359	3,448,394	-6.4%	70.0%
San Luis, AZ	2,628,471	1,983,652	2,492,427	-5.2%	25.6%
Nogales, AZ	3,300,749	1,754,043	3,213,873	-2.6%	83.2%
Eagle Pass, TX	2,235,192	1,279,130	2,088,997	-6.5%	63.3%
Total	50,029,758	30,605,903	43,354,679	-13.3%	41.7%
20. Santa Teresa, NM	452,729	263,862	472,362	4.3%	79.0%

Note: Top ten ports based on 2021 traffic. Numbers are for total passengers and pedestrians. El Paso PoE includes Ysleta PoE. Total is for the top ten ports.

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

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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