

Key Takeaways

Employment

- Total non-farm employment in El Paso grew by 9,800 jobs (3.1%) in February 2022 in a year-over-year comparison.
- Ciudad Juárez experienced gains in total non-farm employment, with an increase of 24,300 jobs (5.1%) in February 2022 in a year-over-year comparison.
- Las Cruces experienced an increase of 4,900 jobs (7.0%) in February 2022 on a year-over-year basis. The relative increase is the largest for the city in the last decade.

Unemployment Insurance Claimants

- El Paso County averaged 455 weekly unemployment insurance claimants from May 2021 through March 2022, with 316 in the week ending on April 2, 2022, matching average weekly pre-pandemic levels.
- Just prior to the COVID-19 pandemic, in the period between January 2019 and February 2020, the average number of weekly unemployment insurance claimants in El Paso County was 316.

Border Crossings

- Crossings of loaded container trucks through the top ten U.S.-Mexico border ports of entry (PoE) increased in 2021 compared to 2020 levels but remained below pre-pandemic levels.
- Total passenger and pedestrian crossings through each of the top ten U.S.-Mexico ports of entry increased in 2021 compared to 2020 levels, but they still have not returned to their pre-pandemic levels. El Paso PoE experienced the second largest increase of 3,741,184 crossings (25.7%) in 2021 compared to 2020 levels.

Employment

Jobs Growth Accelerates in 2022

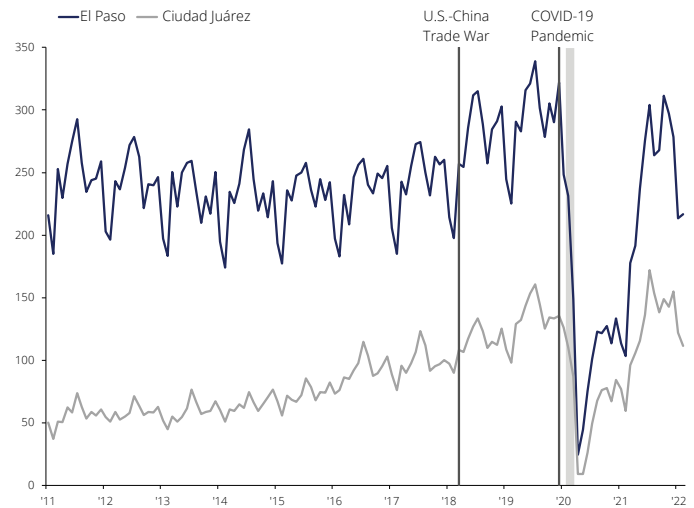
The year-over-year growth of non-farm employment in the Paso del Norte region accelerated in the first two months of 2022, compared to December 2021.

Non-farm employment increased on a monthly basis in El Paso, Las Cruces, and Ciudad Juárez in February 2022 by 2,000 jobs (0.6%), 2,000 jobs (2.7%), and 7,400 jobs (1.5%), respectively.

February marked the 11th consecutive month of year-over-year non-farm employment gains for El Paso and Las Cruces, with El Paso adding 9,800 jobs (3.1%) and Las Cruces adding 4,900 jobs (7.0%). Las Cruces' 7.0% year-over-year relative gain was its largest since October 2018 (3.3%). Non-farm employment gains continued for the 19th consecutive month in Ciudad Juárez, with year-over-year job gains in February of 24,300 jobs (5.1%).

Quick-Glance Indicators

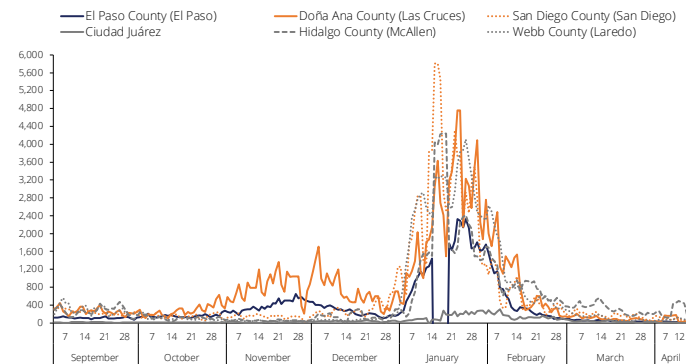
El Paso and Ciudad Juárez Air Passengers, Thousands



Note: Data as of February 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.

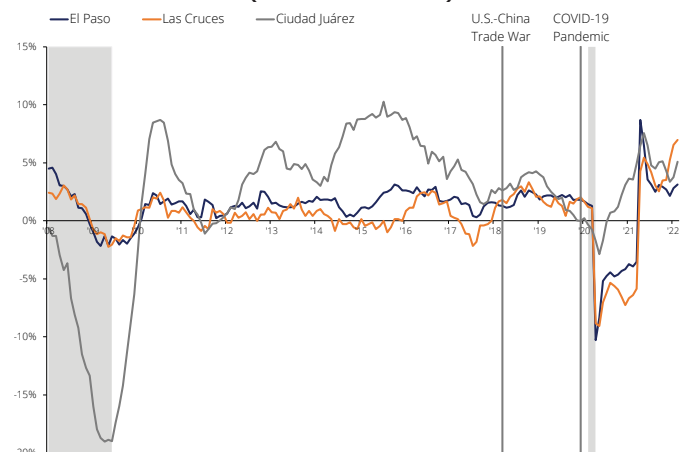
New Coronavirus Cases per 1 Million Inhabitants, 5-Day Moving Average



Note: Data as of April 12, 2022.

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

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



Note: Preliminary data for February 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.

The Hunt Institute tracks five employment sectors to compare non-farm employment in the Paso del Norte region.¹ El Paso experienced an increase in non-farm employment levels on a monthly basis in all sectors, excluding the Manufacturing and Trade sectors. The Services, Transportation and Utilities, and Mining and Construction sectors gained 1,100 jobs (0.5%), 700 jobs (4.1%), and 400 jobs (2.3%), respectively. Trade lost 200 jobs (-0.4%) and Manufacturing remained flat in comparison to January. In Las Cruces, none of the employment sectors lost jobs on a monthly basis. The Services sector increased by 1,800 jobs (3.3%), the Mining and Construction sector gained 100 jobs (2.6%), and the Manufacturing sector gained 100 jobs (3.4%). The Transportation and Utilities, and Trade sectors were stagnant. Ciudad Juárez recorded job gains in each of the key sectors—except Trade—in February on a monthly basis. The job gains by sector in February were: Manufacturing with 6,600 jobs (2.0%); Transportation and Utilities with 450 jobs (1.7%); Services with 350 jobs (0.5%); and Mining and Construction with 270 jobs (1.7%). The Trade sector decreased by 270 jobs (-0.5%) in February.

Trade sector with 3,100 jobs (6.3%); the Manufacturing sector with 14,200 jobs (4.4%); the Mining and Construction sector with 2,800 jobs (20.8%); the Transportation and Utilities sector with 1,700 jobs (6.8%); and the Services sector with 2,600 jobs (3.8%).

Unemployment Insurance Claimants

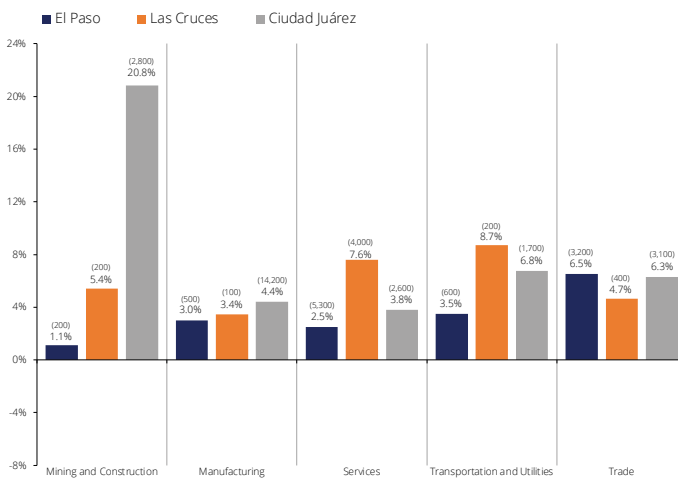
Weekly Unemployment Claimants Stabilize

The number of weekly unemployment insurance claimants in El Paso County reached average pre-pandemic levels in the week ending on April 2, 2022.

Weekly unemployment insurance claimant levels remained above pre-pandemic levels in the early months of 2022, although the gap has been closing since May 2021. Hidalgo, Travis, and El Paso counties continued to mirror each other in terms of weekly unemployment insurance claimants during the period from May 2020 until the week ending on March 7, 2022. Since May 2021, the number of unemployment claimants in El Paso County has been below the other counties analyzed. The peak number of unemployment claimants in El Paso County during this period occurred during the week ending on July 17, 2021, at 898 claimants. The peak for Travis County and Texas as a whole occurred that same week with 1,488 and 37,027 claimants, respectively. Hidalgo County had its highest number of unemployment claimants since May 2021 during the week ending on July 10, 2021, at 1,524 claimants. The lowest weekly number of claimants in El Paso County since May 2021 occurred the week ending November 27, 2021, at 288.

In the period between January 2019 and February 2020, before the COVID-19 pandemic began in the U.S., the average number of weekly unemployment insurance claimants in El Paso County was 316. Weekly unemployment claims have trended downwards since the COVID-era peak in early 2020. El Paso County reported an average of 455 weekly unemployment insurance claimants between May 2021 and March 2022, with 316 in the week ending on April 2, 2022, to match average weekly pre-pandemic levels.

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



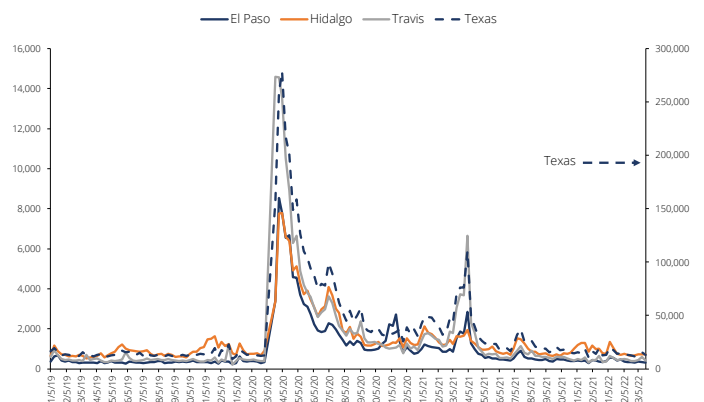
Note: Preliminary data for February 2022. Services excludes Transportation and Utilities and Trade. Numbers are rounded to the nearest hundred.

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

The three cities increased non-farm employment in all sectors in a year-over-year comparison in February 2022. In this comparison, non-farm employment in El Paso grew by 200 jobs (1.1%) in Mining and Construction; 500 jobs (3.0%) in Manufacturing; 5,300 jobs (2.5%) in Services; 600 jobs (3.5%) in Transportation and Utilities; and 3,200 jobs (6.5%) in Trade. In Las Cruces, non-farm employment increased by 4,000 (7.6%) in the Services sector; 400 jobs (4.7%) in the Trade sector; 200 jobs (8.7%) in the Transportation and Utilities sector; 200 jobs (5.4%) in Mining and Construction; and 100 jobs (3.4%) in the Manufacturing sector. Ciudad Juárez recorded increases in the

¹ The five employment sectors that the Hunt Institute tracks for comparison of non-farm employment in the Paso del Norte region are Mining and Construction, Manufacturing, Services, Transportation and Utilities, and Trade.

Weekly Unemployment Insurance Claimants



Source: Hunt Institute using data from the Texas Workforce Commission.

Border Crossings

Border Crossings in 2021 Surpass 2020 Levels

Each of the top ten ports of entry experienced large gains in 2021 in both total commercial and noncommercial traffic compared to 2020 levels.^{2,3}

Total loaded truck container crossings at the top ten U.S.-Mexico border PoE in 2021 increased compared to 2020 by 486,754 (12.1%). However, total loaded container truck crossings through these ports in 2021 remained below pre-pandemic levels by 70,330 crossings (-1.5%). Only one of these ports exceeded its 2019 commercial traffic volume in 2021: at Laredo PoE the commercial traffic level from 2021 surpassed pre-pandemic levels by 198,978 crossings (11.6%).

For the rest of the top ten PoE, commercial traffic has not been able to recover from the decrease caused by the COVID-19 pandemic in 2020. El Paso was the PoE with the largest loss of commercial traffic with 126,469 fewer crossings (-20.7%) in 2021 compared to 2019 levels, followed by Eagle Pass PoE with 23,871 fewer crossings (-15.9%), and Santa Teresa PoE with 17,553 fewer crossings (-15.3%). Commercial crossings at Otay Mesa and Hidalgo PoE almost reached pre-pandemic levels in 2021, with only 18,038 (-2.4%) and 6,530 (-1.4%) fewer crossings, respectively, than in 2019.

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

Port of Entry	A 2019	B 2020	C 2021	Share (%)	C-A (Δ%)	C-B (Δ%)
Laredo, TX	1,711,670	1,629,156	1,910,648	40.5%	11.6%	17.3%
Otay Mesa, CA	759,362	712,100	741,324	15.7%	-2.4%	4.1%
Hidalgo, TX	469,777	436,671	463,247	9.8%	-1.4%	6.1%
El Paso, TX	610,869	429,384	484,400	10.3%	-20.7%	12.8%
Nogales, AZ	293,771	258,948	275,445	5.8%	-6.2%	6.4%
Calexico-East, CA	258,227	207,582	224,949	4.8%	-12.9%	8.4%
Brownsville, TX	153,280	116,710	137,136	2.9%	-10.5%	17.5%
Eagle Pass, TX	149,732	105,437	125,861	2.7%	-15.9%	19.4%
Santa Teresa, NM	114,701	80,806	97,148	2.1%	-15.3%	20.2%
Del Rio, TX	59,951	47,462	50,852	1.1%	-15.2%	7.1%
Total	4,581,340	4,024,256	4,511,010	95.6%	-1.5%	12.1%

Note: Top ten ports based on 2020 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.

However, all of the top ten ports exhibited an increase in commercial traffic from 2020 numbers in 2021. Total loaded container truck crossings through these ports exhibited a gain of 486,754 crossings (12.1%) in a year-over-year comparison. Santa Teresa PoE exhibited the largest relative gain with 16,342

² The 2020 top ten U.S.-Mexico border ports of entry for commercial traffic are Laredo, TX; Otay Mesa, CA; Hidalgo, TX; El Paso, TX; Nogales, AZ; Calexico-East, CA; Brownsville, TX; Eagle Pass, TX; Santa Teresa, NM; Del Rio, TX.

³ The 2020 top ten U.S.-Mexico border ports of entry for noncommercial traffic are San Ysidro, CA; El Paso, TX; Otay Mesa, CA; Calexico-East, CA; Laredo, TX; Brownsville, TX; Hidalgo, TX; San Luis, AZ; Nogales, AZ; Eagle Pass, TX.

additional crossings (20.2%). The Eagle Pass and Brownsville PoEs followed with 20,424 (19.4%) and 20,426 (17.5%) additional crossings, respectively. The ports with the smallest relative gains were Otay Mesa with 29,224 more crossings (4.1%), Hidalgo with 26,576 more crossings (6.1%), and Nogales with an additional 16,497 crossings (6.4%).

Likewise, total passenger and pedestrian crossings at the top ten PoE in 2021 surpassed 2020 levels but remained below pre-pandemic levels of 2019. Total noncommercial crossings at these PoEs in 2021 remained below the 2019 levels by 49,555,654 crossings (-32.1%). The PoEs with the largest relative differences between 2021 and 2019 levels were Laredo with 6,705,838 fewer crossings (-44.2%), Brownsville with 5,309,039 fewer crossings (-42.2%), and Nogales with 3,788,760 fewer crossings (-36.4%). El Paso PoE experienced a decrease of 8,322,697 crossings (-31.2%); Santa Teresa experienced a decrease of 602,275 crossings (-39.0%).

In 2021, total noncommercial traffic at the top ten ports surpassed 2020 levels by 16,147,480 (18.2%) crossings. The PoEs that experienced the largest percentage gains during 2021 on a year-over-year basis were Nogales with 1,546,775 crossings (30.6%), El Paso with 3,741,184 crossings (25.7%), and Hidalgo with 1,266,921 crossings (21.2%). The Santa Teresa PoE experienced an increase of 190,208 crossings (25.4%).

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

Port of Entry	A 2019	B 2020	C 2021	C-A (Δ%)	C-B (Δ%)
San Ysidro, CA	36,724,706	23,091,334	27,356,417	-25.5%	18.5%
El Paso, TX	26,644,366	14,580,485	18,321,669	-31.2%	25.7%
Otay Mesa, CA	14,950,766	9,289,103	9,466,339	-36.7%	1.9%
Calexico, CA	12,713,669	7,838,424	9,346,751	-26.5%	19.2%
Laredo, TX	15,180,224	7,672,728	8,474,386	-44.2%	10.4%
Brownsville, TX	12,587,521	6,226,588	7,278,482	-42.2%	16.9%
Hidalgo, TX	10,891,357	5,978,744	7,245,665	-33.5%	21.2%
San Luis, AZ	7,599,591	5,284,567	6,360,867	-16.3%	20.4%
Nogales, AZ	10,395,837	5,060,302	6,607,077	-36.4%	30.6%
Eagle Pass, TX	6,910,152	3,872,780	4,584,882	-33.7%	18.4%
Total	154,598,189	88,895,055	105,042,535	-32.1%	18.2%
20. Santa Teresa, NM	1,542,564	750,081	940,289	-39.0%	25.4%

Note: Top ten ports based on 2020 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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