

Key Takeaways

Employment

- In April, on a monthly basis, non-farm employment grew in the Paso del Norte region with gains of 0.3% (800 jobs) in El Paso, 0.4% (300 jobs) in Las Cruces, and 0.3% (1,200 jobs) in Ciudad Juárez.

- Non-farm employment also increased on a year-over-year basis in El Paso, Las Cruces, and Ciudad Juárez in April by 8.9%, 4.4%, and 6.5%, respectively. Nevertheless, both El Paso and Las Cruces were still down compared to April 2019 with El Paso at -2.3% and Las Cruces at -4.8%.

Occupation and Certification Demand

- With many businesses seeking to fill open positions, El Paso MSA had 10,693 active online job postings as of June 8th. Of these, sales and related occupations comprised the largest share at 16.7% (1,789 postings), followed by food preparation and serving related occupations at 12.6% (1,347 postings).

Trade

- The top 10 U.S.-Mexico border ports of entry in terms of total merchandise trade in 2020 showed strong signs of improvement in April, with nine of the ports increasing in the January to April 2021 period compared to the same period last year.

- The ports of entry leading the increases were Laredo PoE with a gain of roughly \$13.5 billion, El Paso PoE with a gain of roughly \$5.2 billion, and Hidalgo PoE with a gain of about \$3.6 billion.

- Moreover, seven of the top ten ports also exhibited gains in this period when compared to the January to April 2019 period.

Employment

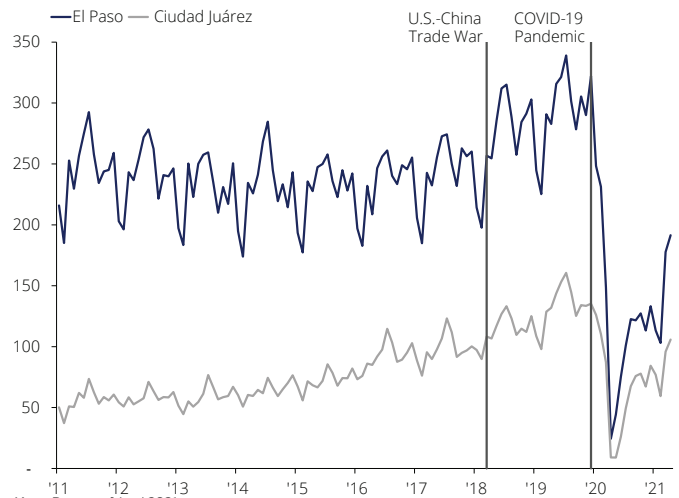
Job Recovery Continues

During April, non-farm employment rose on both a monthly and yearly basis in El Paso, Las Cruces, and Ciudad Juárez.

In April, non-farm employment in the Paso del Norte region once again increased on a monthly basis. This marked the third consecutive month of non-farm employment gains for El Paso and Las Cruces and the fourth consecutive month for Ciudad Juárez with increases of 0.3% (800 jobs), 0.4% (300 jobs), and 0.3% (1,200 jobs), respectively. Non-farm employment also increased in El Paso, Las Cruces, and Ciudad Juárez on a year-over-year basis in April by 8.9% (25,800 jobs), 4.4% (3,000 jobs), and 6.5% (29,100 jobs), respectively. For El Paso and Las Cruces, these increases were their first year-over-year increases since March 2020. Given the magnitude of the decline last April, the increases in April of this year on a yearly basis were hence very steep amidst the continued rebound of the economy.

Quick-Glance Indicators

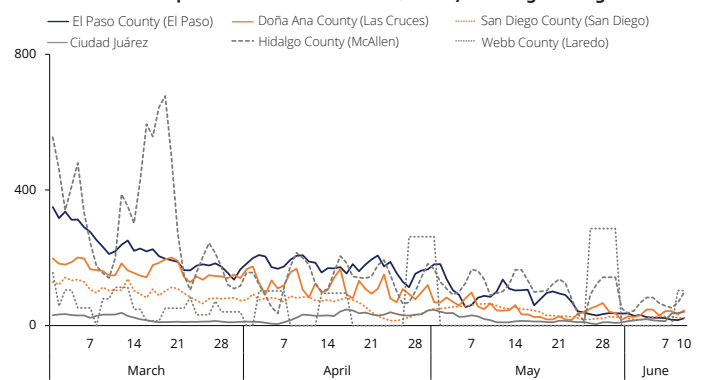
El Paso and Ciudad Juárez Air Passengers, Thousands



Note: Data as of April 2021.

Source: Hunt Institute using El Paso International Airport and Grupo OMA data.

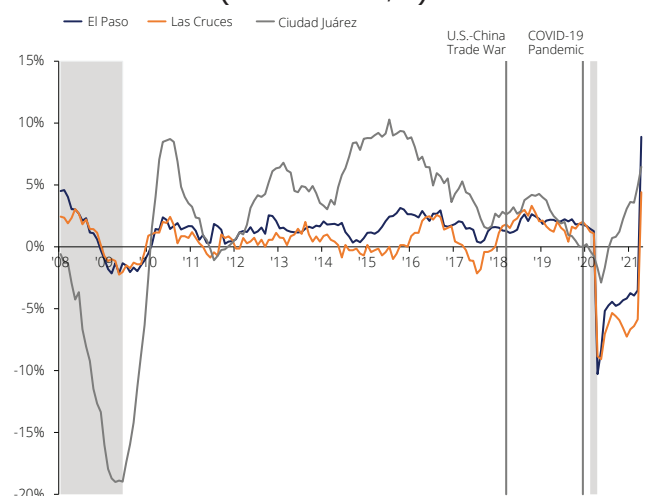
New Coronavirus per 1 Million Inhabitants, 5-Day Moving Average



Note: Data as of June 10, 2021.

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, %)



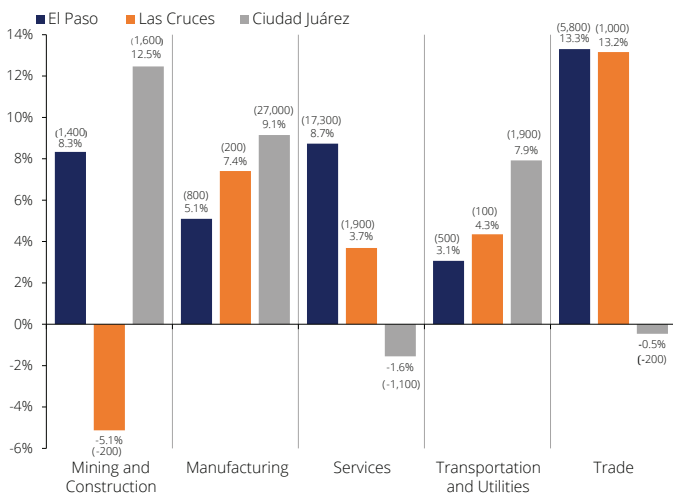
Note: Preliminary data for April 2021. Shaded area indicates NBER defined recession (2020 recession began in February and ended in April).

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

Nevertheless, both El Paso and Las Cruces were still down in April compared to employment numbers from April 2019 with El Paso at -2.3% (-7,500 jobs) and Las Cruces at -4.8% (-3,600 jobs). Continuing the trend begun in August 2020, Ciudad Juárez's increase in April was its 9th consecutive month with a year-over-year increase in non-farm employment.

Considering the five sectors used to evaluate non-farm employment for the Paso del Norte region, positive strides were made in April. El Paso increased in the Services (700 jobs), Trade (200 jobs), and Manufacturing (100 jobs) sectors, but exhibited negative growth in the Transportation and Utilities sector (-200 jobs). Las Cruces increased in the Services (100 jobs), Trade (100 jobs), and Manufacturing (100 jobs) sectors. El Paso and Las Cruces registered no changes in the Mining and Construction sector, while Las Cruces also registered no change in the Transportation and Utilities sector. Ciudad Juárez again registered increases across all sectors with the Manufacturing (600 jobs) and Mining and Construction (200 jobs) sectors rising the most. On a year-over-year basis, El Paso increased in all sectors in April with gains led by the Services sector (17,300 jobs), followed by the Trade (5,800 jobs), Mining and Construction (1,400 jobs), Manufacturing (800), and Transportation and Utilities (500 jobs) sectors. In Las Cruces, aside from the Mining and Construction sector (-200 jobs), all sectors increased with gains led by the Services sector (1,900 jobs), followed by the Trade (1,000 jobs), Manufacturing (200 jobs), and Transportation and Utilities (100 jobs) sectors. Ciudad Juárez decreased in the Services (-1,100 jobs) and Trade (-200 jobs) sectors, while increasing in the Manufacturing (27,000 jobs), Transportation and Utilities (1,900 jobs), and Mining and Construction (1,600 jobs) sectors.

Paso del Norte Total Non-Farm Employment by Sector, April 2021 (Year-over-Year)



Note: Preliminary data for April 2021. Services exclude Transportation and Utilities and Trade. Numbers are rounded to the nearest hundred.
Source: Hunt Institute calculations using U.S. Bureau of Labor Statistics and Instituto Mexicano del Seguro Social data.

The Leisure and Hospitality sector in El Paso and Las Cruces bolstered the yearly non-farm employment gains in April with increases of 12,600 jobs (55.3%) and 2,000 jobs (40.0%), respectively. Nevertheless, the Leisure and Hospitality sector remained down when compared to April 2019 in both El Paso (-8.1% or -3,100 jobs) and Las Cruces (-18.6% or -1,600 jobs).

Occupation and Certification Demand

Openings for Sales and Food Related Occupations

As of June 8th, in El Paso, nearly 30% of all active job listings were for sales and food preparation and serving related occupations.

With the economic recovery underway and large numbers of businesses seeking to fill positions, El Paso MSA had 10,693 active online job postings as of June 8th. Of these, sales and related occupations comprised the largest share at 16.7%, 1,789 active postings, followed by food preparation and serving related occupations (12.6%, 1,347 postings), healthcare practitioners and technical occupations (11.9%, 1,276 postings), office and administrative support occupations (10.6%, 1,134 postings), and transportation and material moving occupations (9.9%, 1,062 postings). Together, these top five major occupation groups comprised almost 62% (6,608 postings) of all active job listings.

Top 5 Major Occupation Groups Demanded in El Paso MSA

Occupation Group	Job Ads	Share (%)
Sales and Related	1,789	16.7%
Food Preparation and Serving Related	1,347	12.6%
Healthcare Practitioners and Technical	1,276	11.9%
Office and Administrative Support	1,134	10.6%
Transportation and Material Moving	1,062	9.9%
Sum of Top 5	6,608	61.8%

Note: Numbers are by active online job postings as of June 8, 2021 and 2-digit occupation code.
Source: Hunt Institute calculations using JobsEQ data.

In terms of in-demand certifications for active job postings, the most demanded in El Paso MSA as of June 8th was a driver's license with 15.7% (519 postings demanding) of all sought after certifications. The next highest was a cardiopulmonary resuscitation (CPR) certification with 10.6% (350 postings demanding) of all in-demand certifications, followed by a registered nurse (RN) certification with 9.4% (310 postings demanding), a basic life support (BLS) certification with 9.2% (302 postings demanding), and an advanced cardiac life support (ACLS) certification with 5.7% (188 postings demanding). As a whole, the top five certifications accounted for 50.6% (1,669 postings) of all in-demand certifications for active job listings in El Paso MSA.

Top 5 Certifications Demanded for Jobs in El Paso MSA

Certification	Job Ads	Share (%)
Driver's License	519	15.7%
Cardiopulmonary Resuscitation (CPR)	350	10.6%
Registered Nurse (RN)	310	9.4%
Basic Life Support (BLS)	302	9.2%
Advanced Cardiac Life Support (ACLS)	188	5.7%
Sum of Top 5	1,669	50.6%

Note: Numbers are by active online job postings as of June 8, 2021.

Source: Hunt Institute calculations using JobsEQ data.

Trade

Positive Signs for Trade in April

Total trade increased at the majority of the top U.S.-Mexico ports of entry in the first four months of the year when compared to 2020 and 2019.

In the January to April 2021 period, nine of the top ten ports exhibited increases in total trade compared to the same period in 2020. Laredo PoE led the gains with an increase of about \$13.5 billion (20.8%), followed by El Paso PoE with an increase of about \$5.2 billion (22.9%), and Hidalgo PoE with an increase of approximately \$3.6 billion (32.9%). On the other hand, Santa Teresa PoE was the only port to decrease, falling by about \$181 million (-2.0%). In total, the top ten ports increased during the January to April 2021 period by roughly \$29.8 billion (19.8%) on a year-over-year basis.

Top 10 U.S.-Mexico Border Ports of Entry for Total Trade with World, Million USD

Port of Entry	A	B	B-A	B-A	April 2021	
	Jan-Apr 2020	Jan-Apr 2021		(Δ%)	MoM	YoY
Laredo, TX	\$65,162	\$78,707	\$13,546	20.8%	-\$1,457	\$10,694
El Paso, TX	\$22,865	\$28,091	\$5,226	22.9%	-\$493	\$3,628
Otay Mesa, CA	\$13,630	\$16,652	\$3,021	22.2%	\$118	\$2,344
Hidalgo, TX	\$11,006	\$14,631	\$3,625	32.9%	-\$411	\$1,594
Eagle Pass, TX	\$8,433	\$10,700	\$2,267	26.9%	-\$41	\$1,730
Santa Teresa, NM	\$9,106	\$8,925	-\$181	-2.0%	-\$120	\$268
Nogales, AZ	\$8,367	\$8,711	\$344	4.1%	-\$54	\$1,165
Brownsville, TX	\$5,804	\$6,825	\$1,021	17.6%	-\$129	\$715
Calexico-East, CA	\$5,045	\$5,933	\$889	17.6%	-\$9	\$711
Del Rio, TX	\$1,455	\$1,542	\$87	5.9%	-\$68	\$158

Note: Top 10 in 2020. El Paso PoE includes Ysleta PoE. YoY denotes year-over-year; MoM denotes month-over-month.

Source: Hunt Institute calculations using U.S. Census Bureau data.

When comparing the January to April 2021 period to the January to April 2019 period, seven of the top ten ports increased, with Laredo PoE (\$2.8 billion or 3.7%), El Paso PoE (\$2.7 billion or 10.5%), and Hidalgo PoE (\$2.3 billion or 19.1%) again leading the increases. Santa Teresa PoE decreased by \$1.1 billion (-11.3%). As a whole, the top ten ports increased by about \$8.6 billion (5.0%) compared to the first four months of 2019.

On a monthly basis, nine of the top ten ports exhibited decreases in April with respect to March. Laredo PoE led the declines, falling by roughly \$1.5 billion (-6.7%), followed by El Paso PoE with a decline of roughly \$493 million (-6.3%), and Hidalgo PoE with a decline of roughly \$411 million (-10.7%). Santa Teresa PoE fell by about \$120 million (-4.8%). With respect to April 2020, all 10 of the top ports increased in April of this year, with gains led by the top 3 ports. Laredo PoE, El Paso PoE, and Otay Mesa PoE exhibited gains of approximately \$10.7 billion (110.3%), \$3.6 billion (97.8%), and \$2.3 billion (103.2%), respectively. Santa Teresa PoE increased by roughly \$268 million (12.8%).

Total merchandise trade exhibited notably positive signs in April, with all of the top U.S.-Mexico ports increasing on a year-over-year basis and the majority of them increasing during the first four months of 2021 compared to both last year and 2019.

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 can strengthen regional and binational cross-border economic and social development.

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