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

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


1 The selected MSAs include El Paso, Las Cruces, Ciudad Juárez, Laredo, McAllen, and San Antonio.
2 The selected MSAs include El Paso, Las Cruces, Laredo, McAllen, and San Antonio.
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 (-6.3%), 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.

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

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

In November 2022, all but one of the selected MSAs exhibited decreases in hotel occupancy rates with the 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 11 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% (135,610) 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 Southwest border apprehensions by type for all Southwest border sectors.

<table>
<thead>
<tr>
<th>Southwest Border Apprehensions by Sector</th>
<th>Jan-Nov 2022</th>
<th>Total</th>
<th>A Jan-Nov 2021</th>
<th>B Jan-Nov 2022</th>
<th>B-A</th>
<th>B-A (Δ%)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Big Bend</td>
<td>626</td>
<td>1,121</td>
<td>5,228</td>
<td>4,565</td>
<td>6,975</td>
<td>2,412</td>
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<tr>
<td>Del Rio</td>
<td>85,967</td>
<td>11,673</td>
<td>226,916</td>
<td>144,089</td>
<td>322,536</td>
<td>178,447</td>
</tr>
<tr>
<td>El Centro</td>
<td>14,209</td>
<td>1,365</td>
<td>28,537</td>
<td>12,044</td>
<td>44,111</td>
<td>32,067</td>
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<tr>
<td>El Paso</td>
<td>68,624</td>
<td>24,043</td>
<td>105,778</td>
<td>35,926</td>
<td>378,445</td>
<td>162,519</td>
</tr>
<tr>
<td>Laredo</td>
<td>362</td>
<td>3,444</td>
<td>4,832</td>
<td>10,173</td>
<td>8,638</td>
<td>(1,535)</td>
</tr>
<tr>
<td>Rio Grande</td>
<td>479,431</td>
<td>66,259</td>
<td>102,176</td>
<td>334,443</td>
<td>277,866</td>
<td>(116,577)</td>
</tr>
<tr>
<td>San Diego</td>
<td>24,965</td>
<td>4,566</td>
<td>36,952</td>
<td>31,195</td>
<td>66,483</td>
<td>35,288</td>
</tr>
<tr>
<td>Tucson</td>
<td>13,617</td>
<td>17,028</td>
<td>33,392</td>
<td>36,577</td>
<td>64,037</td>
<td>27,460</td>
</tr>
<tr>
<td>Yuma</td>
<td>95,534</td>
<td>5,979</td>
<td>153,644</td>
<td>131,098</td>
<td>255,177</td>
<td>124,079</td>
</tr>
</tbody>
</table>

| Southwest Border Total                  | 740,085      | 1,184,235| 444,158        | 60%            |

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

Source: U.S. Customs and Border Protection.