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# Borderplex Economic Outlook: 2007-2009

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**BUSINESS REPORT SR07-2**

# **BORDERPLEX ECONOMIC OUTLOOK: 2007-2009**





# The University of Texas at El Paso

## **Borderplex Economic Outlook: 2007-2009**

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# BORDERPLEX ECONOMIC OUTLOOK: 2007 - 2009

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## Executive Overview

As shown in Table 1, the borderplex economy continues to expand. By 2008, total personal income in El Paso is projected to surpass \$20 billion. That is in large measure reflective of trends in inflation-adjusted gross metropolitan product (real GMP), which will have posted its seventh consecutive year of gains by 2008. Those two developments carry with them numerous business opportunities and the total number of El Paso businesses is expected to surpass the 13.5 thousand mark by the end of the forecast period. Another important yardstick, the metropolitan unemployment rate, exhibits an even more striking forecast path and declines to less than 6 percent for all of 2008 and 2009. Not surprisingly, retail sales tend upwards under this scenario, exceeding \$9.1 billion during the last year shown in Table 1. Additional detail obtained from simulations of the UTEP Borderplex Econometric Forecasting Model is presented below.

## El Paso Demographics

Although the bulk of population growth in El Paso continues to be determined primarily by natural increase, net migration was strongly positive in 2006 (Table 2). It is also forecast to remain positive in coming years. That forecast is based on several distinct factors. Relatively better labor market conditions in El Paso will induce fewer persons to relocate to other regions within the United States. International migration from Mexico is expected to remain positive. Strategic decisions by the Base Realignment and Closure Commission (BRAC) will add large numbers of troops to Fort Bliss for several years to come. The latter development has already increased construction activity at the base and will be converted into higher

rates of off-base household and business formation than would otherwise occur. Given these trends, automobile registrations in El Paso County are projected to surpass the 600 thousand mark by 2009.

## Employment & the El Paso Labor Market

Job creation has remained strong in 2007 and is projected to expand further during the next few years (Table 3). The metropolitan jobless rate is forecast to decline for a fourth consecutive year in 2007 and fall below 6 percent on an annual basis in 2008. That will mark the first time since 1973 that the El Paso unemployment rate has not averaged at least 6 percent or higher for an entire year. BRAC related expansion at Fort Bliss is one of the primary sources of labor market vitality that results in the model simulations. As a consequence of the BRAC process, federal military jobs are likely to exceed 15 thousand in El Paso for the first time since 1994. While questions remain with respect to the timing of the eventual relocation of the Air Defense Artillery School to Fort Sill, activities at the base are accelerating. Service sectors of the economy are also projected to expand at above average rates. Health care, retail, business services, telecommunications, and transportation are among the specific sectors anticipated to do well. As the labor market becomes increasingly services-oriented, improved high school graduation rates, plus greater enrollment levels in post-secondary educational programs, will play critical roles in securing stronger border region jobs and income performance.

## El Paso Personal Income

Real per capita gains are projected for every year in the forecast period. As shown in Table 4, El Paso wage and

salary disbursements are likely to exceed \$10 billion in 2008. Healthy business conditions also permit proprietor incomes to continue growing rapidly. Although national economic prospects are somewhat uncertain, sustained corporate profitability and locally healthy real estate markets permit dividends, interest, and rental payments to increase to more than \$2 billion in 2007. Transfer payments to retirees are expected to surpass \$3 billion in 2008. El Paso will also continue to draw workers from surrounding counties in Texas and New Mexico, as well as from Ciudad Juárez. Consequently, residence adjustments are anticipated to exceed \$600 million per year during the latter part of the forecast period. Strong labor market performance causes unemployment transfers to decline in real terms.

### **Retail Sales in El Paso**

Following retail moderation in 2006, commercial activity in El Paso is projected to expand at progressively more rapid rates between 2007 and 2009 (Table 5). Categories expected to tally above average sales performances include apparel and accessories, dining establishments, and miscellaneous retail. Among the latter, pharmacies and souvenir stores are expected to perform well in 2008 and 2009. Hardware sales are projected to decline in 2007 following several years of robust growth, but that development is not a sign of any underlying weaknesses in that sector. Automobile and fuel sales are not expected to recover any lost ground from prior to 2006 until 2008. At that point, however, this large segment should once again surpass the \$2 billion mark last experienced in 2005. Furniture and appliance sales benefit from a relatively strong construction outlook. Restaurants continue to profit from long-run demographic and labor market trends. In spite of greater percentages of household food budgets spent eating out, food store sales figures are projected to remain above the \$1 billion mark achieved in 2005 and continue to grow slowly.

### **El Paso Residential Construction & Real Estate**

Additional erosion in housing affordability due to higher mortgage rates and housing prices was observed in 2006 in El Paso. Inevitably, that development reduced the pool of qualified borrowers in 2006 and is also projected to do the same in 2007. Because of that, single-family starts are projected to decline again in 2007 (Table 6). The degree of moderation is not predicted to be nearly as severe as some of the regional market retrenchments emerging in other areas of the

United States. Reflective of that, the median prices of both newly built and existing single-family units are projected to advance in real terms throughout the course of the forecast period. The average monthly mortgage payment, net of housing insurance and property taxes, is also expected to increase at a measured pace through 2009. Multi-family construction activity remains fairly strong through 2009 due to the anticipated new troop arrivals and reduced levels of net out-migration from El Paso. The combination of higher mortgage rates and higher prices is partially offset by positive income gains, but not by enough to allow affordability to recover to pre-2000 levels. In spite of the latter, sales of existing homes are projected to remain in excess of 14 thousand units per year throughout the forecast period.

### **El Paso Air Transportation**

As shown in Table 8, domestic air passenger traffic recovered to pre-9/11 levels in 2005. Air fares for the El Paso market subsequently rose by more than 9 percent in 2006 and are not expected to subside during the period under consideration. In response, domestic air passenger flows are forecast to grow only marginally between 2007 and 2009. International passenger volumes have never really rebounded from declines that began to emerge prior to the 2001 recession and terrorist attacks later that year. During 2006, all international air carrier activity ceased at El Paso International Airport (EPIA). That situation is not expected to be reversed until 2008. The total volumes forecast for in-bound and out-bound air freight flows at EPIA do not grow very rapidly. Total cargo activity at EPIA, however, remains robust. Subsequent to the terrorist attacks of 9/11, many cargo shipments are processed at the airport, but delivered via overnight surface transport to destinations within a 12-hour driving radius of El Paso. Those types of delivery arrangements have replaced much of the short-haul air transport that used to occur in many regions of the United States. Also affecting air freight statistics is continued growth in higher value merchandise that weighs less than bulkier products previously delivered via air transport, especially in the cases of products that include electronic components.

### **International Bridge Activity**

Northbound automobile and pedestrian traffic into El Paso have not, in general, returned to their pre-9/11 levels (Table 9). Because of the disruptions that fre-

quently occur as a consequence of changing national security risks, it is likely that international bridge flows into El Paso will permanently remain subject to frequent pattern disruptions. Such disruptions have caused pedestrian volumes across the Bridge of the Americas to surge in 2007. For the downtown Paso del Norte and the eastern Ysleta bridges, the numbers of pedestrians in 2007 have also grown at rapid clips. Personal vehicle traffic flows across all three bridges is still below pre-9/11 levels, in part because of the dedicated commuter lanes operating in Central and East El Paso. Cargo vehicle traffic patterns across the Bridge of the Americas and Ysleta Bridge are closer to what history indicates for both arteries. Maquiladora manufacturing volumes, plus improved inspection practices and technologies, should ensure that more than 800 thousand trucks using these bridges in 2008 and 2009.

### **El Paso Hotel Trends**

The current wave of construction should increase the number of hotels operating in El Paso County to 82 by 2009 (Table 10). By then, the number of room nights available should jump to more than 3.8 million. Given such a large amount of expansion in such a short period of time, the occupancy rate is projected to drop in 2009 to its lowest level since 1988. Given that, the average price per room is forecast to remain nearly unchanged through the end of 2009. In contrast, actual revenues per room are projected to decline steadily as capacity moves sharply upward during the forecast period. Collectively, those trends translate into total county hotel revenues in excess of \$141 million in 2009.

### **El Paso Water Consumption**

Robust population growth translates into similarly strong increases in water customers (Table 11). Not surprisingly, much of that growth is associated with the expansion of the single-family housing stock in El Paso. By 2009, there will be more than 200 thousand accounts at El Paso Water Utilities. Fortunately, for a semi-arid region, per capita consumption declined substantially between 1989 and 2006. A combination of new technologies, public awareness campaigns, and forward looking rates policies should help ensure that per capita consumption trends remain favorable in coming years. While lower rainfall causes aggregate consumption to expand by more than 2 percent in 2007, total gallons consumed are not expected to again reach the 34 billion mark until 2009.

### **Ciudad Juárez Economic Activity**

Maquiladora employment is projected in 2007 to fully recover and exceed the peak level previously achieved in Ciudad Juárez in 2000. While the number of plants in operation is smaller, the scale of the existing factories has increased along with productivity. Consequently, in-bond manufacturing value-added is projected to surpass \$5.1 billion in 2009 (Table 13). Strong labor demand combines with a relatively stable peso outlook in real terms to raise maquiladora hourly earnings to just over \$4.25 dollars per hour by 2009. The steady erosion in competitiveness relative to Central American and Asian countries such as China and India may be on the verge of ending as the Calderón administration seems poised to successfully negotiate with Congress. If measures required to deregulate the Mexican economy via market-oriented reforms are approved, the maquiladora sector may eventually operate at close to full capacity. As labor market conditions have improved, greater numbers of new workers are expected to migrate to Ciudad Juárez from other regions within the country (Table 12). That, plus incomes growth, cause the demand for municipal water service to remain very high. Consequently, the number of water hook-ups is expected to exceed 394 thousand in 2009 with aggregate water consumption exceeding 184 million cubic meters that year. Retail sales are also forecast to expand steadily during the balance of the forecast period (Table 13).

### **Chihuahua City Economic Activity**

Although it is taking longer to materialize, maquiladora payrolls for the Chihuahua City metropolitan economy are also forecast to surpass their all-time peak levels in 2008 (Table 15). A steady peso combines with greater demand for labor to push average hourly wages in the in-bond assembly sector to \$4.70 per hour by the end of the forecast period. Total value-added is projected to exceed \$1.25 billion by 2009. Simulations with the borderplex model indicate that formal sector employment should reach nearly 218 thousand that year. Commercial conditions in the state capital are expected to remain strong, allowing retail payrolls and sales to expand at solid rates through the end of the outlook. Population growth is projected to remain strong as in-migration responds to favorable labor market conditions (Table 14). That development combines with improved income performance to increase the demand for municipal water services. As a consequence, the number of water customers is expected to exceed 255



thousand by 2009. Real rate increases are expected to lower per capita consumption, but not by enough to prevent total water usage from growing to more than 69 million cubic meters in 2009. Vehicle registrations also expand robustly in response to the upward demographic and economic trends.

### **Las Cruces Economic Conditions**

Similar to El Paso, relatively good economic conditions encourage a healthy rate of business formation in the Las Cruces metropolitan economy (Table 16). The 2006 declines in both business and personal bankruptcies are expected to be largely reversed as the new filing regulations take effect. Relatively rapid rates of in-migration, especially by retirees, cause the rate of population growth in Doña Ana County to remain above 2 percent per year through 2009. That allows residential real estate to avoid most of the problems emerging in other regional housing markets. In response, construction payrolls are projected to grow by at least small amounts during all three years of the current forecast period (Table 17). Although growth decelerates in 2007, largely stable public finances permit state and local government payrolls to also continue expanding. The fastest rates of jobs growth are projected for service segments of the economy in this region of Southern New Mexico. Total employment is projected to exceed 96.3 thousand jobs by 2009. Given the outlook for employment, wages and proprietor incomes are estimated to increase substantially, with average growth rates of more than 5 percent per year (Table 18). Given the large influx of senior citizens, retirement transfers are expected to expand at rates in excess of 7 percent per year. In general, most income categories exhibit healthy performances in Las Cruces and total personal income is projected to surpass \$5.6 billion by 2008.

### **Forecast Risks**

National economic conditions in the United States and Mexico are forecast to moderate slightly in 2007, but not collapse into cyclical downturns. Historically high levels of corporate and household indebtedness represent important weak points hampering economic performance in the United States, especially as numerous regional housing markets weaken throughout the country. Although political uncertainty exists in Mexico, a new era seems to slowly be gaining traction and allowing effective policy dialogues to take place

between the executive and legislative branches. If recessions emerge in either macroeconomy, or both, the negative impacts would quickly hurt the borderplex economy. Closer to home, El Paso and Las Cruces continue to face difficulties associated with low educational attainment and physical infrastructure investment. The respective percentages of sub-prime mortgages for these metropolitan economies are estimated at 20 percent for El Paso and 16 percent for Las Cruces. Those percentages are lower than what they are in some of the housing markets where notable price declines have been observed since 2005. The private sectors in Ciudad Juárez and Chihuahua City continue to struggle with complex business licensing requirements and all four cities face ongoing risks associated with heightened security requirements at the border. Also critical to the accuracy of the outlook for El Paso is the manner in which the BRAC decisions are implemented, particularly the timing of the relocation of the Air Defense Artillery School to Fort Sill, Oklahoma.

### **Historical and Forecast Data**

Tables 1 through 18 summarize the numerical results from the short-term forecast simulation to 2009 using the UTEP Borderplex Econometric Forecasting Model. Forecasts for El Paso and Las Cruces income, employment, and business establishments in the current edition begin in 2006. Forecasts for all other data series begin in 2007. At present, the model is comprised by 215 equations covering all of the categories listed in the tables. Suggestions and requests for next year's volume are welcome. Please send them to Border Region Modeling Project - CBA 236, UTEP Department of Economics & Finance, 500 West University, El Paso, TX 79968-0543.

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**Table 9**  
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**Table 18**  
**Las Cruces Personal Income**

**Table 1: Major Indicators for El Paso**

	1999	2000	2001	2002	2003	2004	2005	2006	2007	2008	2009
El Paso Population	675.397	681.572	687.915	694.078	702.281	712.481	721.183	736.310	747.640	758.681	770.351
% change	0.6	0.9	0.9	0.9	1.2	1.5	1.2	2.1	1.5	1.5	1.5
Net Migration	-5.904	-4.163	-3.811	-3.661	-1.636	-0.058	-1.399	4.927	0.960	0.550	1.063
El Paso Personal Income	11741.1	12649.9	13510.5	14200.5	14672.1	15727.4	16771.5	17980	19135	20309.4	21631.9
% change	3.0	7.7	6.8	5.1	3.3	7.2	6.6	7.2	6.4	6.1	6.5
El Paso Labor and Proprietor Earnings	8820.2	9512.9	10342.7	10941.3	11392.9	12199.8	12893.1	13659.2	14706.1	15534.9	16466.5
% change	4.6	7.9	8.7	5.8	4.1	7.1	5.7	5.9	7.7	5.6	6.0
El Paso Real GMP	14.457	14.420	14.265	14.900	15.450	15.981	16.465	16.968	17.493	18.159	18.922
% change	3.1	-0.3	-1.1	4.5	3.7	3.4	3.0	3.1	3.1	3.8	4.2
El Paso Businesses	12.379	12.310	12.214	12.403	12.355	12.355	12.556	12.696	12.994	13.263	13.508
% change	-0.2	-0.6	-0.8	1.5	-0.4	0.0	1.6	1.1	2.3	2.1	1.8
El Paso Total Jobs	319.893	326.272	325.114	331.676	336.821	341.909	349.204	357.626	365.172	373.203	382.283
% change	1.6	2.0	-0.4	2.0	1.6	1.5	2.1	2.4	2.1	2.2	2.4
El Paso Jobless Rate	9.4	8.2	8.2	8.7	9.6	7.8	7.1	6.9	6.2	5.9	5.8
El Paso Housing Starts	3.962	3.495	3.533	3.777	5.1620	3.645	5.131	4.358	4.172	4.385	4.583
% change	14.6	-11.8	1.1	6.9	36.7	-29.4	40.8	-15.1	-4.3	5.1	4.5
El Paso New House Prices	90.966	93.578	95.281	97.565	100.286	105.185	113.998	123.212	132.885	137.984	142.106
% change	2.0	2.9	1.8	2.4	2.8	4.9	8.4	8.1	7.9	3.8	3.0
El Paso Retail Sales	5885.0	6343.5	6354.1	6655.1	6904.4	7325.3	7984.7	7979.5	8300.7	8667.8	9112.2
% change	10.8	7.8	0.2	4.7	3.7	6.1	9.0	-0.1	4.0	4.4	5.1
International Bridges	15.996	16.696	16.184	13.053	13.698	14.816	15.958	15.467	14.313	14.590	14.885
% change	5.2	4.4	-3.1	-19.3	4.9	8.2	7.7	-3.1	-7.5	1.9	2.0
El Paso Water Consumption	35.771	36.022	35.387	35.372	33.898	32.042	32.565	32.595	33.383	33.793	34.121
% change	2.0	0.7	-1.8	0.0	-4.2	-5.5	1.6	0.1	2.4	1.2	1.0

## Notes:

1. El Paso population in thousands.
2. El Paso net migration in thousands.
3. All income and earnings data are expressed in millions of nominal dollars.
4. Real gross metropolitan product data are expressed in billions of 1996 dollars.
5. Total El Paso business establishments in thousands.
6. Total El Paso employment in thousands.
7. El Paso unemployment rate in percentage terms.
8. Total El Paso housing starts in thousands.
9. El Paso median new single-family house prices in thousands of nominal dollars.
10. El Paso total retail sales reported in millions of nominal dollars.
11. Total northbound international bridge crossings are in millions of personal vehicles.
12. Total El Paso water consumption in billion gallons

**Table 2: El Paso Demographics**

	1999	2000	2001	2002	2003	2004	2005	2006	2007	2008	2009
Population	675.397	681.572	687.915	694.078	702.281	712.481	721.183	736.310	747.640	758.681	770.351
% change	0.6	0.9	0.9	0.9	1.2	1.5	1.2	2.1	1.5	1.5	1.5
Resident Births	13.981	14.285	14.189	14.058	14.201	14.401	14.484	14.700	14.900	15.088	15.260
% change	-3.5	2.2	-0.7	-0.9	1.0	1.4	0.6	1.5	1.4	1.3	1.1
Resident Deaths	3.93	3.947	4.035	4.234	4.362	4.143	4.383	4.500	4.531	4.597	4.653
% change	2.5	0.4	2.2	4.9	3.0	-5.0	5.8	2.7	0.7	1.5	1.2
Net Migration	-5.904	-4.163	-3.811	-3.661	-1.636	-0.058	-1.399	4.927	0.960	0.550	1.063
Domestic Migration	-10.319	-9.579	-8.839	-8.315	-4.413	-4.637	-5.696	-0.233	-3.050	-3.086	-2.999
International Migration	4.415	5.416	5.028	4.654	2.777	4.579	4.297	5.160	4.010	3.636	4.062
Households	208.219	210.881	212.618	214.593	217.208	220.426	223.169	227.88	231.047	234.247	237.473
% change	1.8	1.3	0.8	0.9	1.2	1.5	1.2	2.1	1.4	1.4	1.4
Automobile Registrations	443.443	445.849	457.576	477.725	501.426	505.459	533.438	562.591	566.892	585.593	606.517
% change	3.3	0.5	2.6	4.4	5.0	0.8	5.5	5.5	0.8	3.3	3.6
Civilian Labor Force	340.418	342.706	341.106	350.016	358.937	357.766	362.874	367.672	375.055	381.535	389.523
% change	0.9	0.7	-0.5	2.6	2.5	-0.3	1.4	1.3	2.0	1.7	2.1
Business Establishments	12.379	12.31	12.214	12.403	12.355	12.355	12.556	12.696	12.994	13.263	13.508
% change	-0.2	-0.6	-0.8	1.5	-0.4	0.0	1.6	1.1	2.3	2.1	1.8
Retail Outlets	10.336	10.092	9.781	10.268	10.345	10.499	10.600	10.700	10.860	11.014	11.164
% change	0.8	-2.4	-3.1	5.0	0.7	1.5	1.0	0.9	1.5	1.4	1.4
Business Bankruptcies	80	75	94	82	104	93	114	56	85	87	89
% change	-14.9	-6.3	25.3	-12.8	26.8	-10.6	22.6	-50.9	51.8	2.4	2.3
Personal Bankruptcies	2642	2678	3153	3050	3218	3160	3045	2041	3056	3096	3139
% change	17	1.4	17.7	-3.3	5.5	-1.8	-3.6	-33	49.7	1.3	1.4
UTEP Fall Enrollment	14.695	15.224	16.220	17.232	18.542	18.918	19.268	19.842	20.154	20.574	21.016
% change	0.1	3.6	6.5	6.2	7.6	2.0	1.9	3.0	1.6	2.1	2.1
EPCC Fall Enrollment	18.897	18.001	18.561	19.859	23.016	24.740	25.160	24.839	24.036	24.502	24.972
% change	-1.5	-4.7	3.1	7.0	15.9	7.5	1.7	-1.3	-3.2	1.9	1.9

## Notes:

1. Business and personal bankruptcy data reported in actual units.
2. All other data are reported in thousands.

**Table 3: El Paso Labor Force and Employment**

	1999	2000	2001	2002	2003	2004	2005	2006	2007	2008	2009
Civilian Labor Force	340.418	342.706	341.106	350.016	358.937	357.766	362.874	367.672	375.055	381.535	389.523
% change	0.9	0.7	-0.5	2.6	2.5	-0.3	1.4	1.3	2	1.7	2.1
Unemployment Rate	9.4	8.2	8.2	8.7	9.6	7.8	7.1	6.9	6.2	5.9	5.8
Total Employment	319.893	326.272	325.114	331.676	336.821	341.909	349.204	357.626	365.172	373.203	382.283
% change	1.6	2	-0.4	2	1.6	1.5	2.1	2.4	2.1	2.2	2.4
El Paso Construction	18.720	18.613	18.351	18.246	19.145	19.448	20.457	21.562	21.639	21.416	21.735
% change	5.8	-0.6	-1.4	-0.6	4.9	1.6	5.2	5.4	0.4	-1	1.5
Manufacturing	41.404	39.496	36.432	32.398	28.788	26.505	24.799	22.222	21.197	20.653	20.302
% change	-7.2	-4.6	-7.8	-11.1	-11.1	-7.9	-6.4	-10.4	-4.6	-2.6	-1.7
Local Government	38.644	39.778	40.459	40.623	41.474	42.075	42.577	43.258	44.402	45.463	46.438
% change	4.4	2.9	1.7	0.4	2.1	1.4	1.2	1.6	2.6	2.4	2.1
State Government	7.460	7.606	7.745	7.914	7.862	7.650	7.931	8.058	8.286	8.509	8.732
% change	1.9	2	1.8	2.2	-0.7	-2.7	3.7	1.6	2.8	2.7	2.6
Federal Civilian Govt.	8.507	8.818	8.478	8.475	8.823	9.035	9.299	9.494	9.662	9.836	10.008
% change	-1.4	3.7	-3.9	0.0	4.1	2.4	2.9	2.1	1.8	1.8	1.8
Military Employment	11.474	11.668	11.979	12.111	12.342	12.049	12.094	13.047	13.514	14.239	15.212
% change	-3.9	1.7	2.7	1.1	1.9	-2.4	0.4	7.9	3.6	5.4	6.8
Not Elsewhere Classified	193.684	200.293	201.670	211.909	218.387	225.147	232.047	239.985	246.472	253.088	259.855
% change	3.3	3.4	0.7	5.1	3.1	3.1	3.1	3.4	2.7	2.7	2.7

## Notes:

1. Labor force data are in thousands.
2. Unemployment rate data are in percentages.
3. Employment data in thousands.
4. Not Elsewhere Classified includes communications, services, retail, financial and other employment categories.

**Table 4: El Paso Personal Income**

	1999	2000	2001	2002	2003	2004	2005	2006	2007	2008	2009
Total Personal Income	11741.1	12649.9	13510.5	14200.5	14672.1	15727.4	16771.5	17980	19135	20309.4	21631.9
% change	3.0	7.7	6.8	5.1	3.3	7.2	6.6	7.2	6.4	6.1	6.5
Wages and Salaries	6704.9	7047	7205.2	7510.8	7740.7	8115.3	8480.4	9092.9	9617.2	10147.9	10756.6
% change	3.8	5.1	2.2	4.2	3.1	4.8	4.5	7.2	5.8	5.5	6.0
Other Labor Income	1004.1	1074.1	1151.5	1328.5	1442.2	1562.1	1707.6	1832.7	1920.7	2002.9	2088.4
% change	4.5	7.0	7.2	15.4	8.6	8.3	9.3	7.3	4.8	4.3	4.3
Proprietor Incomes	1111.2	1391.8	1985.9	2102	2209.9	2522.4	2705.1	2947.9	3168.1	3384.1	3621.5
% change	9.5	25.3	42.7	5.8	5.1	14.1	7.2	9.0	7.5	6.8	7.0
Social Ins. Cntrbns.	476.6	496.5	534.4	568.7	586.4	619.4	658.5	706.6	748.8	791.1	840.1
% change	3.9	4.2	7.6	6.4	3.1	5.6	6.3	7.3	6.0	5.6	6.2
Residence Adjustments	-493.6	-515.0	-539.7	-560.3	-567.0	-573.6	-579.4	-588.6	-599.7	-613.1	-627.0
% change	-3.4	-4.3	-4.8	-3.8	-1.2	-1.2	-1.0	-1.6	-1.9	-2.2	-2.3
Dividends, Int., Rent	1751.3	1881.1	1771.5	1674.4	1522.8	1661.4	1758	1879.3	2026.9	2177.3	2368.2
% change	-3.6	7.4	-5.8	-5.5	-9.1	9.1	5.8	6.9	7.9	7.4	8.8
Retirement Transfers	1701.8	1827	2022.9	2198.3	2314.4	2413.5	2631.3	2759.9	2961.8	3171.2	3384.4
% change	2.5	7.4	10.7	8.7	5.3	4.3	9.0	4.9	7.3	7.1	6.7
Inc. Maint. Transfers	423.3	427.7	433.6	496.3	573.7	629.8	714.5	750.3	776.3	817.8	867.6
% change	3.1	1.0	1.4	14.5	15.6	9.8	13.5	5.0	3.5	5.3	6.1
Unemployment Transfers	14.7	12.8	13.9	19.3	21.8	16.0	12.4	12.3	12.3	12.3	12.3
% change	9.6	-13.3	9.0	38.5	13.2	-26.9	-22.1	-1.4	0.8	0.0	-0.1

## Notes:

1. All income data are expressed in millions of dollars.
2. Social insurance contributions are deducted from total regional income estimates.
3. Retirement transfer payments include social security and other retirement payments.
4. Income maintenance transfers include aid to families with dependent children and other payments.
5. Unemployment transfer payments include unemployment insurance payments to individuals.

**Table 5: El Paso Gross Retail Activity**

	1999	2000	2001	2002	2003	2004	2005	2006	2007	2008	2009
Total	5885	6343.5	6354.1	6655.1	6904.4	7325.3	7984.7	7979.5	8300.7	8667.8	9112.2
% change	10.8	7.8	0.2	4.7	3.7	6.1	9.0	-0.1	4.0	4.4	5.1
Hardware Stores	336.1	329.5	338.4	360.8	379.7	445.9	508.1	543.3	525.8	552.6	582.8
% change	0.1	-2.0	2.7	6.6	5.2	17.4	13.9	6.9	-3.2	5.1	5.5
General Merchandise	960.8	1022.2	1113.1	1180.9	1238.2	1332.9	1432.1	1520.6	1594.6	1674.5	1762.6
% change	53.8	6.4	8.9	6.1	4.8	7.7	7.4	6.2	4.9	5.0	5.3
Food Stores	892.8	907.1	868.2	864.3	876.7	893.6	1007.8	1050	1072.5	1094.2	1118.8
% change	-5.6	1.6	-4.3	-0.4	1.4	1.9	12.8	4.2	2.1	2.0	2.2
Automobiles and Fuel	1360.3	1531.9	1604.1	1716.7	1820.8	1982.8	2149	1974.1	1986.6	2050.8	2156.8
% change	11.8	12.6	4.7	7.0	6.1	8.9	8.4	-8.1	0.6	3.2	5.2
Apparel & Accessories	464.9	511.6	492.7	496.1	490.2	496.9	499.8	508.2	559.7	591.5	625.8
% change	10.1	10.0	-3.7	0.7	-1.2	1.4	0.6	1.7	10.1	5.7	5.8
Furniture & Appliances	389.2	429.8	423.9	428.3	435.8	456.1	477.0	503.8	530.2	557.3	586.9
% change	2.8	10.4	-1.4	1.0	1.7	4.7	4.6	5.6	5.3	5.1	5.3
Dining Establishments	555.9	593.4	603.4	630.9	656.4	701.1	743.7	760.4	816.7	863.4	917.6
% change	2.9	6.7	1.7	4.6	4.0	6.8	6.1	2.3	7.4	5.7	6.3
Miscellaneous Retail	924.9	1018.1	910.2	977	1006.6	1016	1167.1	1119	1214.7	1283.5	1361
% change	9.4	10.1	-10.6	7.3	3.0	0.9	14.9	-4.1	8.6	5.7	6.0

## Notes:

1. All sales figures are expressed in millions of dollars.
2. Hardware stores include hardware, garden supply, and building materials stores, plus mobile home dealers.
3. General merchandise stores include department, variety, and miscellaneous dry goods stores.
4. Food stores include grocery stores, seafood markets, vegetable stands, candy stores, bakeries, and dairy outlets.
5. Automobiles and fuel includes car and motorcycle dealers, auto parts stores, gasoline service stations, water and rec. vehicle dealers.
6. Dining establishments include restaurants, caterers, ice cream parlors, cafes, bars and nightclubs.
7. Miscellaneous includes pharmacies, liquor, sporting good, book, jewelry, luggage, toy, camera, optical, florist, and souvenir stores.

**Table 6: El Paso Residential Construction & Real Estate**

	1999	2000	2001	2002	2003	2004	2005	2006	2007	2008	2009
Total Housing Starts	3,962	3,495	3,533	3,777	5,162	3,645	5,131	4,358	4,172	4,385	4,583
% change	14.6	-11.8	1.1	6.9	36.7	-29.4	40.8	-15.1	-4.3	5.1	4.5
Single-Family Starts	3,631	3,104	3,464	3,612	4,888	3,37	4,467	4,045	3,825	4,040	4,082
% change	9.7	-14.5	11.6	4.3	35.3	-31.1	32.6	-9.4	-5.4	5.6	1.0
Multi-Family Starts	0,331	0,391	0,069	0,165	0,274	0,275	0,664	0,313	0,347	0,345	0,501
% change	122.1	18.1	-82.4	139.1	66.1	0.4	141.5	-52.9	10.8	-0.4	45.1
Total Housing Stock	214,145	218,105	221,743	225,722	230,204	235,385	239,72	243,85	248,259	252,411	256,753
% change	1.8	1.8	1.7	1.8	2.0	2.3	1.8	1.7	1.8	1.7	1.7
Single-Family Stock	149,774	153,734	157,309	161,161	165,538	170,497	174,36	177,867	181,965	185,789	189,809
% change	2.6	2.6	2.3	2.4	2.7	3.0	2.3	2.0	2.3	2.1	2.2
Multi-Family Stock	64,371	64,371	64,434	64,561	64,666	64,888	65,360	65,983	66,293	66,622	66,945
% change	0.0	0.0	0.1	0.2	0.2	0.3	0.7	1.0	0.5	0.5	0.5
Median New Price	90,966	93,578	95,281	97,565	100,286	105,185	113,998	123,212	132,885	137,984	142,106
% change	2.0	2.9	1.8	2.4	2.8	4.9	8.4	8.1	7.9	3.8	3.0
Median Resale Price	78.75	80.64	86.25	88.958	92.678	94.557	105.935	117.849	125.093	129.245	133.649
% change	0.9	2.4	7.0	3.1	4.2	2.0	12	11.2	6.1	3.3	3.4
Average Monthly Payment	541	580	559	553	540	570	624	684	724	747	772
% change	2.4	7.2	-3.6	-1.0	-2.4	5.5	9.6	9.5	5.9	3.2	3.3
Affordability Index	235.5	227	241.9	248.1	257.3	250.6	231.6	206.2	201.2	206.9	208.8
% change	6.3	-3.6	6.6	2.5	3.7	-2.6	-7.6	-10.9	-2.4	2.8	0.9
Existing Units Sold	11,943	10,63	11,29	11,524	13,161	11,681	14,279	15,087	14,323	14,084	14,042
% change	12.5	-11	6.2	2.1	14.2	-11.2	22.2	5.7	-5.1	-1.7	-0.3

## Notes:

1. Housing start and stock data are in thousands.
2. Affordability index increases as household income strengthens relative to mortgage payments.
3. Average monthly mortgage payment is in current dollars.
4. Existing housing units sold includes both stand-alone and multi-family units.
5. Median new and existing home prices are for stand-alone units and quoted in thousands of dollars.



**Table 7: El Paso Nonresidential Construction**

	1999	2000	2001	2002	2003	2004	2005	2006	2007	2008	2009
Total Nonresidential Space	263.768	305.734	278.392	335.159	257.311	304.491	408.271	477.469	467.015	463.623	456.575
% change	22.0	15.9	-8.9	20.4	-23.2	18.3	34.1	16.9	-2.2	-0.7	-1.5
Industrial Space Permits	13.392	11.861	1.923	0	1.918	5.959	1.901	2.224	6.598	6.626	6.050
% change	5.9	-11.4	-83.8	-100.0	NC	210.7	-68.1	17.0	196.7	0.4	-8.7
Office Space Permit Values	11.475	10.222	10.971	23.8	15.16	20.535	20.308	27.982	22.29	20.075	23.930
% change	-11.1	-10.9	7.3	116.9	-36.3	35.5	-1.1	37.8	-20.3	-9.9	19.2
Other Commercial Space	191.797	195.371	206.246	224.125	169.274	179.3	186.341	353.898	333.808	337.952	315.929
% change	21.4	1.9	5.6	8.7	-24.5	5.9	3.9	89.9	-5.7	1.2	-6.5
Miscellaneous Nonres.	47.104	88.281	59.251	87.234	70.959	98.697	199.721	93.364	104.319	98.971	110.665
% change	44.2	87.4	-32.9	47.2	-18.7	39.1	102.4	-53.3	11.7	-5.1	11.8

## Notes:

1. All nonresidential construction permits data are quoted in millions of dollars.
2. Other commercial permits include service stations, retail stores, parking garages, warehouses, and public utilities.
3. Miscellaneous includes port facilities, recreational buildings, sports stadiums, swimming pools, and health care facilities.

**Table 8: El Paso International Airport**

	1999	2000	2001	2002	2003	2004	2005	2006	2007	2008	2009
Passenger Arrivals	1648.0	1624.6	1527.3	1425.8	1446.7	1591.8	1673.8	1687.8	1685.1	1702.0	1751.0
% change	2.6	-1.4	-6.0	-6.7	1.5	10	5.1	0.8	-0.2	1.0	2.9
Domestic Arrivals	1631.0	1611.7	1516.6	1414.8	1441.7	1588.6	1670.4	1687.7	1685.1	1701.6	1750.0
% change	2.6	-1.2	-5.9	-6.7	1.9	10.2	5.1	1.0	-0.2	1.0	2.8
International Arrivals	16.974	12.847	10.726	10.928	4.975	3.180	3.349	0.106	0	0.413	0.997
% change	9.2	-24.3	-16.5	1.9	-54.5	-36.1	5.3	-96.8	-99.8	NC	141.4
Passenger Departures	1691.6	1688.1	1564.4	1450.0	1464.0	1612.6	1697.7	1714.6	1706.8	1720.6	1771.0
% change	3.4	-0.2	-7.3	-7.3	1.0	10.2	5.3	1.0	-0.5	0.8	2.9
Domestic Departures	1674.7	1676.3	1554.0	1439.5	1459.2	1609.7	1694.4	1714.4	1706.8	1720.2	1770.0
% change	3.4	0.1	-7.3	-7.4	1.4	10.3	5.3	1.2	-0.4	0.8	2.9
International Departures	16.947	11.843	10.345	10.426	4.727	2.955	3.258	0.137	0	0.412	1.011
% change	10.4	-30.1	-12.6	0.8	-54.7	-37.5	10.3	-95.8	-99.8	NC	145.2
In-Bound Freight	55.600	55.204	46.013	51.637	45.366	46.747	48.095	47.402	46.378	46.949	47.910
% change	17.3	-0.7	-16.6	12.2	-12.1	3.0	2.9	-1.4	-2.2	1.2	2.0
Out-Bound Freight	38.811	41.697	33.599	35.106	36.557	35.911	38.140	36.064	38.293	40.045	41.656
% change	9.9	7.4	-19.4	4.5	4.1	-1.8	6.2	-5.4	6.2	4.6	4.0
In-Bound Mail	4.096	4.337	3.378	1.784	1.610	1.505	1.648	1.323	0.822	0.811	0.808
% change	12.0	5.9	-22.1	-47.2	-9.8	-6.5	9.5	-19.8	-37.9	-1.3	-0.3
Out-Bound Mail	2.307	2.331	1.362	0.346	0.529	0.621	0.337	0.151	0.055	0.051	0.049
% change	32.2	1.1	-41.6	-74.6	52.8	17.4	-45.7	-55.3	-63.9	-5.9	-5.0

## Notes:

1. El Paso International Airport passenger data are in thousands.
2. El Paso International Airport freight data are in thousand tons.
3. El Paso International Airport mail data are in thousand tons.

**Table 9: Northbound International Bridge Traffic**

	1999	2000	2001	2002	2003	2004	2005	2006	2007	2008	2009
Pedestrians, All Bridges	5.666	5.84	7.198	9.301	8.899	8.453	7.639	7.499	7.999	7.902	7.811
% change	8.9	3.1	23.3	29.2	-4.3	-5.0	-9.6	-1.8	6.7	-1.2	-1.2
Cars, All Bridges	15.996	16.696	16.184	13.053	13.698	14.816	15.958	15.467	14.313	14.59	14.885
% change	5.2	4.4	-3.1	-19.3	4.9	8.2	7.7	-3.1	-7.5	1.9	2.0
Trucks, All Bridges	0.672	0.729	0.666	0.704	0.66	0.72	0.746	0.773	0.786	0.806	0.835
% change	10.9	8.4	-8.6	5.8	-6.3	9.1	3.6	3.7	1.6	2.6	3.5
Cordova Bridge											
BOTA Pedestrians	0.534	0.605	0.769	1.208	1.021	0.785	0.612	0.586	0.706	0.648	0.628
% change	-20.8	13.3	27.0	57.0	-15.4	-23.1	-22.1	-4.3	20.6	-8.2	-3.2
BOTA Personal Vehicles	8.196	8.168	7.295	4.708	4.68	6.125	8.066	7.686	6.554	6.728	6.904
% change	8.5	-0.3	-10.7	-35.5	-0.6	30.9	31.7	-4.7	-14.7	2.7	2.6
BOTA Cargo Vehicles	0.343	0.363	0.335	0.375	0.346	0.383	0.399	0.387	0.396	0.405	0.413
% change	9.9	5.9	-7.8	12.0	-7.8	10.6	4.1	-2.8	2.3	2.1	2.0
Paso del Norte Bridge											
PDN Pedestrians	4.798	4.858	5.927	7.252	7.08	6.919	6.345	6.188	6.509	6.488	6.439
% change	14.3	1.2	22.0	22.4	-2.4	-2.3	-8.3	-2.5	5.2	-0.3	-0.7
PDN Personal Vehicles	4.179	4.672	4.632	3.658	4.173	3.91	3.447	3.393	3.068	3.1	3.151
% change	-5.3	11.8	-0.9	-21.0	14.1	-6.3	-11.8	-1.6	-9.6	1.0	1.7
DCL Personal Vehicles	UN	UN	0.386	1.138	1.475	1.451	1.244	1.068	1.077	1.086	1.095
% change	UN	UN	UN	194.7	29.7	-1.6	-14.3	-14.1	0.8	0.8	0.8
Ysleta Zaragoza Bridge											
Ysleta Pedestrians	0.334	0.377	0.502	0.841	0.797	0.748	0.682	0.725	0.784	0.765	0.743
% change	0.7	12.9	33.3	67.4	-5.2	-6.2	-8.8	6.2	8.1	-2.3	-2.9
Ysleta Personal Vehicles	3.621	3.856	3.871	3.55	3.37	3.33	3.2	3.32	3.387	3.441	3.496
% change	11.5	6.5	0.4	-8.3	-5.1	-1.2	-3.9	3.7	2.0	1.6	1.6
Ysleta Cargo Vehicles	0.329	0.365	0.331	0.329	0.314	0.337	0.347	0.386	0.389	0.402	0.422
% change	12.0	11.1	-9.4	-0.6	-4.6	7.4	3.1	11.1	1.0	3.2	5.0
DYL Personal Vehicles	UN	UN	UN	UN	UN	UN	UN	0.099	0.228	0.235	0.239
% change	UN	UN	UN	UN	UN	UN	UN	UN	129.7	3.1	1.7

## Notes:

1. All bridge data are for northbound traffic categories into the City of El Paso.
2. Pedestrian, personal vehicle (cars, light trucks, mini-vans), and cargo vehicle data are reported in millions.
3. DCL and DYL are acronyms for Stanton Dedicated Commuter Lane and Ysleta Dedicated Commuter Lane, respectively.

**Table 10: El Paso County Hotel Activity**

	1999	2000	2001	2002	2003	2004	2005	2006	2007	2008	2009
Hotels in Operation	70	71	72	73	74	74	75	74	76	80	82
% change	0.0	1.4	1.4	1.4	1.4	0.0	1.4	-1.3	2.7	5.3	2.5
Room Nights Available	2732.9	2767.6	2687.7	2714.0	2769.3	2792.6	2820.8	2818.0	2922.2	3490.4	3854.5
% change	1.2	1.3	-2.9	1.0	2.0	0.8	1.0	-0.1	3.7	19.4	10.4
Room Nights Sold	1678.0	1711.5	1655.0	1677.3	1700.6	1885.4	1873.7	1978.6	1978.3	2022.6	2079.8
% change	3.8	2.0	-3.3	1.3	1.4	10.9	-0.6	5.6	-0.0	2.2	2.8
Hotel Occupancy Rate	61.4	61.8	61.6	61.8	61.4	67.5	66.4	70.2	67.7	57.9	54.0
Hotel Room Price	53.06	54.41	54.52	55.70	55.97	57.73	61.08	67.15	67.05	67.26	67.8
% change	3.3	2.5	0.2	2.2	0.5	3.1	5.8	9.9	-0.2	0.3	0.8
Actual Revenue per Room	32.58	33.65	33.57	34.42	34.37	38.97	40.57	47.15	45.39	38.98	36.58
% change	6.0	3.3	-0.2	2.5	-0.2	13.4	4.1	16.2	-3.7	-14.1	-6.1
Total Revenues	89.036	93.124	90.233	93.425	95.179	108.835	114.443	132.866	132.644	136.046	141.017
% change	7.2	4.6	-3.1	3.5	1.9	14.3	5.2	16.1	-0.2	2.6	3.7

## Notes:

1. El Paso County hotel room night data are reported in thousands.
2. El Paso County hotel pricing data are reported in nominal dollars.
3. Total hotel revenues are reported in million nominal dollars.

**Table 11: El Paso Water Consumption**

	1999	2000	2001	2002	2003	2004	2005	2006	2007	2008	2009
Total Water Customers	159,038	163,949	167,448	171,870	176,327	181,248	185,801	189,116	193,570	197,844	202,079
% change	2.2	3.1	2.1	2.6	2.6	2.8	2.5	1.8	2.4	2.2	2.1
Single-Family Meters	130,510	133,879	136,286	139,396	142,680	146,333	150,126	153,314	156,879	160,242	163,551
% change	2.5	2.6	1.8	2.3	2.4	2.6	2.6	2.1	2.3	2.1	2.1
Multi-Family Meters	4,765	4,758	4,730	4,725	4,737	4,739	4,754	4,752	4,767	4,780	4,792
% change	0.2	-0.1	-0.6	-0.1	0.3	0.0	0.3	-0.0	0.3	0.3	0.3
Commercial Business Meters	8,663	8,828	8,973	9,114	9,215	8,675	8,494	8,695	8,750	8,823	8,906
% change	0.1	1.9	1.6	1.6	1.1	-5.9	-2.1	2.4	0.6	0.8	0.9
Industrial Business Meters	0,188	0,207	0,206	0,195	0,194	0,191	0,185	0,183	0,185	0,186	0,186
% change	-5.5	10.1	-0.5	-5.3	-0.5	-1.5	-3.1	-1.1	1.1	0.5	0.0
Other Meter Connections	14,912	16,277	17,253	18,440	19,501	21,310	22,242	22,172	22,989	23,814	24,644
% change	1.8	9.2	6.0	6.9	5.8	9.3	4.4	-0.3	3.7	3.6	3.5
Total Water Consumed	35,771	36,022	35,387	35,372	33,898	32,042	32,565	32,595	33,383	33,793	34,121
% change	2.0	0.7	-1.8	-0.0	-4.2	-5.5	1.6	0.1	2.4	1.2	1.0
Single-Family Gallons	20,187	20,338	19,932	19,999	19,383	18,123	18,412	18,128	18,794	19,074	19,264
% change	1.7	0.7	-2.0	0.3	-3.1	-6.5	1.6	-1.5	3.7	1.5	1.0
Multi-Family Gallons	3,721	3,699	3,525	3,486	3,324	3,205	3,130	3,088	3,075	3,066	3,065
% change	3.5	-0.6	-4.7	-1.1	-4.7	-3.6	-2.3	-1.3	-0.4	-0.3	-0.0
Commercial Gallons Cons.	4,484	4,574	4,370	4,215	4,094	3,927	3,823	3,729	3,746	3,775	3,808
% change	3.6	2.0	-4.5	-3.5	-2.9	-4.1	-2.7	-2.5	0.5	0.8	0.9
Industrial Gallons Consumed	0,729	0,714	0,496	0,408	0,349	0,400	0,454	0,513	0,521	0,524	0,524
% change	-19.5	-2.1	-30.6	-17.7	-14.3	14.4	13.6	13.1	1.5	0.6	0.1
Other Water Consumption	6,650	6,697	7,064	7,264	6,748	6,387	6,745	7,137	7,247	7,354	7,459
% change	4.1	0.7	5.5	2.8	-7.1	-5.4	5.6	5.8	1.5	1.5	1.4

## Notes:

1. Water customer meter connections are reported in thousands.
2. El Paso water consumption data are reported in billion gallons.
3. Other water accounts include schools, parks, churches, and government agencies.

**Table 12: Ciudad Juarez Demographic Indicators**

	1999	2000	2001	2002	2003	2004	2005	2006	2007	2008	2009
Ciudad Juarez Population	1205.6	1218.8	1242.3	1267.9	1296.2	1323.9	1351.2	1377.9	1409.7	1442.5	1476.1
% change	3.9	1.1	1.9	2.1	2.2	2.1	2.1	2.0	2.3	2.3	2.3
Resident Births	30.851	30.124	33.420	30.414	29.015	28.330	29.126	29.900	30.702	31.504	32.311
% change	18.1	-2.4	10.9	-9.0	-4.6	-2.4	2.8	2.7	2.7	2.6	2.6
Resident Deaths	5.345	5.616	5.822	5.924	6.199	5.672	5.855	6.200	6.267	6.388	6.508
% change	2.1	5.1	3.7	1.8	4.6	-8.5	3.2	5.9	1.1	1.9	1.9
Net Migration	20.303	-11.265	-4.107	1.101	5.459	5.080	4.001	3.054	7.373	7.638	7.787
Domestic Migration	24.718	-5.849	0.921	5.755	8.236	9.659	8.298	8.214	11.384	11.274	11.849
International Migration	-4.415	-5.416	-5.028	-4.654	-2.777	-4.579	-4.297	-5.160	-4.010	-3.636	-4.062
Ciudad Juarez Water Meters	242.089	257.151	273.954	292.597	309.768	319.540	329.312	349.489	364.283	379.313	394.593
% change	6.8	6.2	6.5	6.8	5.9	3.2	3.1	6.1	4.2	4.1	4.0
Total Water Consumption	148.400	155.631	160.205	149.590	151.348	161.810	166.166	170.766	175.364	179.888	184.356
% change	2.0	4.9	2.9	-6.6	1.2	6.9	2.7	2.8	2.7	2.6	2.5
Registered Automobiles	302.031	318.034	304.394	290.292	281.217	293.532	311.876	342.321	352.194	361.889	371.504
% change	5.7	5.3	-4.3	-4.6	-3.1	4.4	6.2	9.8	2.9	2.8	2.7
Registered Cargo Vehicles	74.698	91.021	80.822	79.981	76.772	77.743	80.721	83.903	90.986	98.009	103.601
% change	8.7	21.9	-11.2	-1.0	-4.0	1.3	3.8	3.9	8.4	7.7	5.7
UACJ Enrollment	8.709	9.957	11.319	13.078	14.607	15.686	17.273	18.045	18.490	18.946	19.415
% change	6.1	14.3	13.7	15.5	11.7	7.4	10.1	4.5	2.5	2.5	2.5
ITRCJ Enrollment	5.226	5.127	4.981	4.783	4.652	4.635	4.454	4.561	4.628	4.697	4.763
% change	-5.2	-1.9	-2.8	-4.0	-2.7	-0.4	-3.9	2.4	1.5	1.5	1.4

## Notes:

1. All Ciudad Juarez population, vehicle, and college enrollment data are reported in thousands.
2. Ciudad Juarez water meter connections are expressed in thousands.
3. Ciudad Juarez water consumption is reported in million cubic meters.

**Table 13: Ciudad Juarez Economic Indicators**

	1999	2000	2001	2002	2003	2004	2005	2006	2007	2008	2009
Total Maquiladora Emp.	218,456	249,380	228,445	200,891	194,642	204,542	218,349	239,308	253,904	266,991	279,769
% change	5.7	14.2	-8.4	-12.1	-3.1	5.1	6.8	9.6	6.1	5.2	4.8
Juarez Maquiladora Plants	271	308	307	279	271	286	291	285	287	289	291
% change	5.0	13.7	-0.3	-9.1	-2.9	5.5	1.7	-2.1	0.7	0.7	0.7
Average Hourly Wages	2.95	3.38	3.86	4.20	3.92	3.87	4.15	3.53	3.82	4.06	4.27
% change	17.0	14.7	14.1	8.8	-6.8	-1.2	7.3	-14.9	8.2	6.2	5.3
Total Value Added	2575.9	3267.4	3535.2	3603.1	3411.2	3435.3	3818.1	3804.3	4214.8	4649.8	5120.9
% change	22.8	26.8	8.2	1.9	-5.3	0.7	11.1	-0.4	10.8	10.3	10.1
Total Formal Sector Emp.	390,622	411,485	375,988	340,966	325,212	331,521	347,801	374,520	403,017	424,433	444,819
% change	9.8	5.3	-8.6	-9.3	-4.6	1.9	4.9	7.7	7.6	5.3	4.8
Total Mfg. Employment	262,283	284,675	248,757	215,605	202,376	204,930	218,346	237,249	256,820	269,543	282,456
% change	9.0	8.5	-12.6	-13.3	-6.1	1.3	6.5	8.7	8.2	5.0	4.8
Commerce Employment	35,727	38,204	40,200	38,972	37,669	38,258	39,317	41,903	43,633	45,305	46,967
% change	9.9	6.9	5.2	-3.1	-3.3	1.6	2.8	6.6	4.1	3.8	3.7
Regulated Industry Emp.	10,659	11,675	11,851	11,443	11,264	11,145	11,436	9,930	10,932	11,880	12,779
% change	18.5	9.5	1.5	-3.4	-1.6	-1.1	2.6	-13.2	10.1	8.7	7.6
Services & Other Emp.	81,953	76,931	75,180	74,946	73,903	77,188	78,702	85,438	91,632	97,705	102,618
% change	11.1	-6.1	-2.3	-0.3	-1.4	4.4	2.0	8.6	7.2	6.6	5.0
Retail Sales Activity	106.1	113.6	95.4	93.6	100.0	104.8	122.9	119.3	127.3	134.2	140.3
% change	1.6	7.1	-16.0	-1.9	6.8	4.8	17.3	-2.9	6.7	5.5	4.5
Wholesale Activity	108.2	118.4	114.0	105.8	100.0	104.2	87.9	113.2	116.1	122.7	128.6
% change	10.1	9.4	-3.7	-7.2	-5.5	4.2	-15.6	28.8	2.6	5.7	4.8

## Notes:

1. Ciudad Juarez employment data are reported in thousands.
2. Ciudad Juarez maquiladora hourly wages are reported in nominal dollar equivalents and include benefits.
3. The maquiladora industry standard work week is 45 hours.
4. Ciudad Juarez maquiladora value-added data are expressed in millions of nominal dollars.
5. Ciudad Juarez formal sector jobs are those covered by the social security system in Mexico.
6. Regulated sectors include transportation, communications, and public utilities.
7. Inflation adjusted retail index and wholesale index base years are 2003 = 100.

**Table 14: Chihuahua Demographic & Commercial Indicators**

	1999	2000	2001	2002	2003	2004	2005	2006	2007	2008	2009
Chihuahua City Population	664.739	671.800	680.426	689.402	698.073	710.450	728.558	742.445	755.042	768.095	781.352
% change	1.7	1.1	1.3	1.3	1.3	1.8	2.5	1.9	1.7	1.7	1.7
Chihuahua City Births	15.255	17.502	17.086	17.141	16.735	16.440	16.542	16.800	16.909	17.059	17.214
% change	2.4	14.7	-2.4	0.3	-2.4	-1.8	0.6	1.6	0.6	0.9	0.9
Chihuahua City Deaths	3.291	3.314	4.134	4.556	4.682	4.487	4.990	5.100	5.123	5.171	5.219
% change	1.9	0.7	24.7	10.2	2.8	-4.2	11.2	2.2	0.4	0.9	0.9
Net Migration	-1.051	-7.127	-4.326	-3.609	-3.382	0.424	6.556	2.187	0.812	1.165	1.262
Chihuahua City Water Meters	132.665	160.621	186.026	202.785	204.707	215.178	217.768	228.044	237.243	246.426	255.623
% change	1.6	21.1	15.8	9.0	0.9	5.1	1.2	4.7	4.0	3.9	3.7
Total Water Consumption	59.935	62.970	64.149	67.816	66.104	63.522	59.698	62.323	64.541	66.690	69.039
% change	2.0	5.1	1.9	5.7	-2.5	-3.9	-6.0	4.4	3.6	3.3	3.5
Registered Automobiles	119.090	130.090	130.785	131.999	138.785	151.126	163.594	185.536	189.128	196.101	202.738
% change	7.5	9.2	0.5	0.9	5.1	8.9	8.3	13.4	1.9	3.7	3.4
Registered Cargo Vehicles	70.596	76.035	76.494	77.139	83.961	93.687	98.871	101.355	106.158	110.727	115.101
% change	4.5	7.7	0.6	0.8	8.8	11.6	5.5	2.5	4.7	4.3	3.9
Retail Activity Index	97.6	103.9	99.2	97.5	100.0	114.5	122.9	130.0	134.2	139.4	147.6
% change	2.0	6.5	-4.5	-1.7	2.6	14.5	7.3	5.8	3.2	3.9	5.9
Wholesale Activity Index	110.3	113.9	97.2	94.8	100.0	86.0	87.9	90.5	95.0	99.4	103.7
% change	24.2	3.3	-14.7	-2.5	5.5	-14.0	2.2	3.0	5.0	4.7	4.3
UACH Enrollment	13.144	14.166	16.025	13.891	15.255	16.073	17.354	17.839	18.240	18.623	18.995
% change	10.0	7.8	13.1	-13.3	9.8	5.4	8.0	2.8	2.2	2.1	2.0
ITRCH Number 1 Enrollment	5.421	5.715	5.847	4.859	4.123	4.446	4.450	4.349	4.491	4.627	4.759
% change	7.5	5.4	2.3	-16.9	-15.1	7.8	0.1	-2.3	3.3	3.0	2.9

## Notes:

1. Chihuahua City population, water meter, vehicle, and college enrollment data are reported in thousands.
2. Chihuahua City water consumption data are reported in million cubic meters.
3. Chihuahua City inflation adjusted retail and wholesale index base years are 2003 = 100.
4. UACH is the acronym for Universidad Autonoma de Chihuahua.
5. ITRCH Number 1 is the acronym for Instituto Tecnológico Regional de



**Table 15: Chihuahua City Economic Indicators**

	1999	2000	2001	2002	2003	2004	2005	2006	2007	2008	2009
Total Maquiladora Emp.	47,289	51,170	42,990	40,584	43,627	42,908	42,937	45,411	49,677	53,664	57,582
% change	16.3	8.2	-16.0	-5.6	7.5	-1.6	0.1	5.8	9.4	8.0	7.3
Chih. City Maq. Plants	82	84	81	74	76	76	74	77	78	79	80
% change	6.5	2.4	-3.6	-8.6	2.7	0.0	-2.6	4.1	1.3	1.3	1.3
Average Hourly Wages	2.97	3.66	4.65	5.14	4.37	4.16	4.64	3.96	4.26	4.48	4.70
% change	16.9	23.4	26.9	10.6	-14.9	-4.8	11.4	-14.7	7.6	5.1	4.9
Total Value Added	650.2	859.9	991.4	934.5	961.3	849.3	958.6	859.0	998.8	1,135.50	1,283.60
% change	30.2	32.3	15.3	-5.7	2.9	-11.6	12.9	-10.4	16.3	13.7	13.0
Total Formal Sector Emp.	175,087	185,538	180,359	173,481	168,778	169,441	173,570	182,647	193,478	205,104	217,793
% change	7.7	6.0	-2.8	-3.8	-2.7	0.4	2.4	5.2	5.9	6.0	6.2
Total Mfg. Employment	79,297	88,860	80,755	74,223	67,044	65,498	66,732	69,107	73,865	78,456	82,113
% change	15.2	12.1	-9.1	-8.1	-9.7	-2.3	1.9	3.6	6.9	6.2	4.7
Commerce Employment	26,466	30,455	32,982	33,944	35,059	34,954	34,765	37,744	39,711	42,035	44,435
% change	5.1	15.1	8.3	2.9	3.3	-0.3	-0.5	8.6	5.2	5.9	5.7
Regulated Industry Emp.	8,983	9,199	9,001	8,438	8,302	8,666	8,851	7,855	8,427	8,948	9,522
% change	0.7	2.4	-2.2	-6.3	-1.6	4.4	2.1	-11.3	7.3	6.2	6.4
Services & Other Emp.	60,341	57,024	57,621	56,876	58,373	60,323	63,222	67,941	71,475	75,665	81,723
% change	1.1	-5.5	1.0	-1.3	2.6	3.3	4.8	7.5	5.2	5.9	8.0

## Notes:

1. Chihuahua City employment data are reported in thousands.
2. Chihuahua City maquiladora hourly wages are reported in nominal dollars and include benefits.
3. The maquiladora industry standard work week is 45 hours.
4. Chihuahua City maquiladora value-added data are expressed in millions of nominal dollars.
5. Chihuahua City formal sector jobs are those covered by the social security system in Mexico.
6. Regulated sectors include transportation, communications, and public utilities.

**Table 16: Las Cruces Demographic & Other Indicators**

	1999	2000	2001	2002	2003	2004	2005	2006	2007	2008	2009
Population	173.889	175.013	176.668	178.639	182.456	185.298	189.306	193.888	197.952	202.252	206.498
% change	1.1	0.6	0.9	1.1	2.1	1.6	2.2	2.4	2.1	2.2	2.1
Business Establishments	3.260	3.211	3.226	3.245	3.331	3.422	3.540	3.670	3.738	3.819	3.907
% change	2.4	-1.5	0.5	0.6	2.7	2.7	3.4	3.7	1.8	2.2	2.3
Business Bankruptcies	46	30	65	61	78	80	73	17	74	76	78
% change	43.8	-34.8	116.7	-6.2	27.9	2.6	-8.8	-76.7	335.3	2.7	2.6
Personal Bankruptcies	606	512	626	648	756	747	946	569	821	841	857
% change	-5.8	-15.5	22.3	3.5	16.7	-1.2	26.6	-39.9	44.3	2.4	1.9
NMSU Fall Enrollment	15.449	14.958	15.224	15.243	16.174	16.428	16.072	16.264	16.723	17.026	17.377
% change	0.3	-3.2	1.8	0.1	6.1	1.6	-2.2	1.2	2.8	1.8	2.1
DABCC Fall Enrollment	4.471	4.640	4.717	5.178	5.590	6.083	6.570	6.921	7.585	7.793	8.039
% change	4.0	3.8	1.7	9.8	8.0	8.8	8.0	5.3	9.6	2.7	3.2
Personal Income	2998.3	3120.0	3460.0	3580.1	3736.7	4091.8	4367.3	4672.0	4968.4	5271.2	5604.4
% change	3.0	4.1	10.9	3.5	4.4	9.5	6.7	7.0	6.3	6.1	6.3
Labor and Proprietor Earnings	1845.8	1891.6	2068.1	2201.8	2355.4	2561.3	2757.5	3001.5	3131.2	3300.2	3482.8
% change	3.5	2.5	9.3	6.5	7.0	8.7	7.7	8.8	4.3	5.4	5.5
Real GMP	3.655	3.679	3.653	3.945	4.144	4.347	4.606	4.837	5.003	5.181	5.393
% change	4.2	0.7	-0.7	8.0	5.0	4.9	6.0	5.0	3.4	3.6	4.1
Total Employment	72.977	75.557	76.905	79.267	81.891	84.047	87.493	90.794	92.321	94.224	96.316
% change	3.5	3.5	1.8	3.1	3.3	2.6	4.1	3.8	1.7	2.1	2.2

## Notes:

1. The Las Cruces metropolitan economy is comprised by Dona Ana County.
2. Population, college enrollment, and business establishment data are in thousands.
3. All income and earnings data are expressed in millions of dollars.
4. Labor and proprietor earnings encompass wage and salary disbursements, other labor income, and proprietor earnings.
5. Real gross metropolitan product data are expressed in billions of 1996 dollars.
6. Employment data are expressed in thousands.

**Table 17: Las Cruces Employment**

	1999	2000	2001	2002	2003	2004	2005	2006	2007	2008	2009
Las Cruces Total Emp.	72,977	75,557	76,905	79,267	81,891	84,047	87,493	90,794	92,321	94,224	96,316
% change	3.5	3.5	1.8	3.1	3.3	2.6	4.1	3.8	1.7	2.1	2.2
Construction Employment	4,737	4,599	4,515	4,710	5,164	5,493	6,014	6,351	6,398	6,529	6,666
% change	7.4	-2.9	-1.8	4.3	9.6	6.4	9.5	5.6	0.7	2.1	2.1
Manufacturing	3,430	3,481	3,368	3,682	3,794	3,822	3,599	3,648	3,626	3,624	3,663
% change	5.2	1.5	-3.2	9.3	3.0	0.7	-5.8	1.4	-0.6	-0.1	1.1
State Government	7,627	7,972	8,603	8,451	8,558	8,843	8,987	9,203	9,221	9,296	9,408
% change	-0.8	4.5	7.9	-1.8	1.3	3.3	1.6	2.4	0.2	0.8	1.2
Local Government	6,920	6,938	7,039	7,500	7,487	7,996	8,301	8,522	8,528	8,674	8,848
% change	-2.1	0.3	1.5	6.5	-0.2	6.8	3.8	2.7	0.1	1.7	2.0
Federal Civilian Govt.	3,439	3,538	3,349	3,407	3,506	3,474	3,559	3,637	3,638	3,673	3,721
% change	-4.7	2.9	-5.3	1.7	2.9	-0.9	2.4	2.2	0.0	0.9	1.3
Military Employment	0,661	0,639	0,631	0,623	0,626	0,601	0,567	0,578	0,578	0,581	0,585
% change	0.0	-3.3	-1.3	-1.3	0.5	-4.0	-5.7	1.9	-0.1	0.6	0.6
Not Elsewhere Classified	46,163	48,39	49.4	50,894	52,756	53,818	56,466	58,855	60,332	61,847	63,425
% change	5.4	4.8	2.1	3.0	3.7	2.0	4.9	4.2	2.5	2.5	2.6

## Notes:

1. Employment data are expressed in thousands.
2. Not Elsewhere Classified includes communications, services, retail, financial and other employment categories.

**Table 18: Las Cruces Personal Income**

	1999	2000	2001	2002	2003	2004	2005	2006	2007	2008	2009
Total Personal Income	2998.3	3120.0	3460.0	3580.1	3736.7	4091.8	4367.3	4672.0	4968.4	5271.2	5604.4
% change	3.0	4.1	10.9	3.5	4.4	9.5	6.7	7.0	6.3	6.1	6.3
Wages and Salaries	1360.1	1451.6	1509.0	1641.7	1747.4	1867.5	2026.3	2168.1	2278.1	2400.7	2534.4
% change	4.5	6.7	4.0	8.8	6.4	6.9	8.5	7.0	5.1	5.4	5.6
Other Labor Income	223.1	237.0	251.6	293.3	316.7	357.1	394.4	422.4	460.1	481.0	501.2
% change	1.8	6.2	6.2	16.6	8.0	12.8	10.4	7.1	8.9	4.5	4.2
Proprietor Incomes	262.5	203.1	307.5	266.8	291.3	336.7	336.9	372.4	393.0	418.5	447.2
% change	0.1	-22.7	51.4	-13.3	9.2	15.6	0.1	10.5	5.5	6.5	6.8
Social Ins. Cntrbns.	104.3	107.6	114.6	123.2	131.1	140.9	155.2	166.2	176.0	185.6	196.1
% change	6.7	3.3	6.4	7.5	6.4	7.5	10.2	7.1	5.9	5.4	5.7
Residence Adjustments	186.5	202.4	217.5	214.0	214.1	226.6	230.7	235.2	247.9	261.0	274.9
% change	11.6	8.5	7.5	-1.6	0.0	5.9	1.8	1.9	5.4	5.3	5.3
Dividends, Int., Rent	524.6	547.4	612.5	536.5	499.5	584.0	599.9	658.1	707.9	761.3	828.4
% change	-3.9	4.4	11.9	-12.4	-6.9	16.9	2.7	9.7	7.6	7.5	8.8
Retirement Transfers	438.9	483.1	571.9	630.6	666.0	718.9	781.9	823.3	883.3	947.3	1015.1
% change	4.9	10.1	18.4	10.3	5.6	7.9	8.8	5.3	7.3	7.2	7.2
Inc. Maint. Transfers	93.5	92.9	94.4	106.1	117.7	129.5	142.1	149.4	164.3	176.7	188.9
% change	11.3	-0.6	1.6	12.4	10.9	10.1	9.8	5.1	10.0	7.6	6.9
Unemployment Transfers	13.3	10.3	10.2	14.3	15.2	12.4	10.4	9.3	9.7	10.1	10.5
% change	45.4	-22.8	-1.1	41.3	5.7	-18.4	-16.3	-9.8	4.2	4.0	4.0

## Notes:

1. All Las Cruces income data are expressed in millions of dollars.
2. Social insurance contributions are deducted from total regional income estimates.
3. Retirement transfer payments include social security and other retirement payments.
4. Income maintenance transfers include aid to families with dependent children and other payments.
5. Unemployment transfer payments include unemployment insurance payments to individuals.
6. The Las Cruces metropolitan economy is comprised by Dona Ana County.

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The authors of this publication are UTEP Wells Fargo Professor Tom Fullerton and UTEP Associate Economist Angel L. Molina, Jr. Dr. Fullerton holds degrees from UTEP, Iowa State University, Wharton School of Finance at the University of Pennsylvania, and University of Florida. Prior experience includes positions as Economist in the Executive Office of the Governor of Idaho, International Economist in the Latin America Service of Wharton Econometrics, and Senior Economist at the Bureau of Economic and Business Research at the University of Florida. Angel Molina holds an M.S. in Economics from UTEP and has published research on cross-border growth patterns and linkages.

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Professor Barraza is an award winning economist who has taught at several universities in Mexico and has published in academic research journals in Mexico, Europe, and the United States. Dr. Barraza currently serves as Research Provost at UACJ. Professor Fullerton has authored econometric studies published in academic research journals of North America, Europe, South America, Asia, Africa, and Australia. Dr. Fullerton has delivered economics lectures in Canada, Colombia, Ecuador, Finland, Germany, Japan, Korea, Mexico, the United Kingdom, the United States, and Venezuela.

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Professor Calderón is an award winning economist who has taught and published in Mexico, France, and the United States. Dr. Calderón spent a year as a Fulbright Scholar at the University of Texas at El Paso. Professor Fullerton has published research articles in North America, Europe, Africa, South America, Asia, and Australia. The author of several econometric forecasts regarding impacts of the Brady Initiative for Debt Relief in Latin America, Dr. Fullerton has delivered economics lectures in Canada, Colombia, Ecuador, Finland, Germany, Japan, Korea, Mexico, the United States, and Venezuela.

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