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Thomas M. Fullerton Jr.

Aaron D. Nazarian

Omar Solís

Steven L. Fullerton

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**BORDERPLEX ECONOMIC OUTLOOK  
TO 2020**







THE UNIVERSITY OF TEXAS AT EL PASO

## **UTEP BORDER REGION MODELING PROJECT**

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Business Report SR 18-1

# **BORDERPLEX ECONOMIC OUTLOOK TO 2020**



This business report is a publication of the Border Region Modeling Project and the Department of Economics & Finance at the University of Texas at El Paso. For additional Border Region information, please visit the [www.academics.utep.edu/border](http://www.academics.utep.edu/border) section of the UTEP web site.

Please send comments to Border Region Modeling Project - CBA 236, Department of Economics & Finance, 500 West University, El Paso, TX 79968-0543.


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Continued maintenance and expansion of the UTEP business modeling system requires ongoing financial support. For information on potential means for supporting this research effort, please contact Border Region Modeling Project - CBA 236, Department of Economics & Finance, 500 West University, El Paso, TX 79968-0543.

# BORDERPLEX ECONOMIC OUTLOOK TO 2020

Thomas M. Fullerton, Jr. Aaron D. Nazarian, Omar Solís,  
and Steven L. Fullerton

Department of Economics & Finance  
University of Texas at El Paso  
El Paso, TX 79968-0543  
Telephone 915-747-7747  
Facsimile 915-747-6282  
Email tomf@utep.edu

## EXECUTIVE OVERVIEW

Borderplex regional economic growth is forecast to continue in 2019 and 2020. Reflective of that prognostication, the El Paso unemployment rate is expected to remain below the five percent mark for the entire forecast period. Interest rates are rising, however, and that tends to hamper capital- and debt-intensive industries such as construction, manufacturing, telecommunications, warehousing, transportation, and real estate. Consequently, formal sector employment forecasts for Ciudad Juárez and Chihuahua City decelerate in 2019 due to slower anticipated growth rates in the export manufacturing segments of those metropolitan economies. In contrast, the Las Cruces labor market conditions are expected to strengthen in both 2019 and 2020. Although the Borderplex breathed a collective sigh of relief once a new continental trade agreement was reached, substantial uncertainty still abounds with respect to national economic policy issues in Washington and Mexico City.

## EL PASO DEMOGRAPHICS

Stable population growth is projected through 2020 for El Paso (Table 2). At the end of the forecast period, El Paso is forecast to have more than 853 thousand residents. Labor demand in the oil patch is expected to encourage further domestic out-migration. In spite of that, the number of households should surpass 280 thousand by 2020. Demographic expansion plus favorable income growth combine to ensure that automobile registrations increase at rates in excess of population growth. The civilian labor force in El Paso is predicted to reach almost 450 thousand by 2020.

The number of registered business establishments is likely to approximate 14,750 in 2020. With relatively good economic conditions expected to prevail, business and personal bankruptcies are projected to remain at levels below those observed during the most recent business cycle downturn. College enrollments are also forecast to increase at both UTEP and EPCC.

## **EMPLOYMENT & THE EL PASO LABOR MARKET**

Unemployment has been very low by historical standards since 2014, and the jobless rate is projected to remain below 5 percent throughout the entire simulation period (Table 3). Job losses related to ongoing automation are projected for manufacturing. Payrolls are predicted to be flat, at best, for the public sector due to budget constraints. The most robust rates of employment expansion are likely in service segments of the metropolitan economy. Although job growth is expected to be relatively moderate, unemployment remains low due to worker out-migration to other labor markets where labor shortages have emerged.

## **EL PASO PERSONAL INCOME**

El Paso personal income is predicted to reach \$33 billion by 2020. Wage and salary disbursements are expected to surpass \$16.1 billion that year (Table 4). Proprietor incomes are anticipated to rise to \$21.2 billion. Healthy equity markets and real estate conditions allow dividends, interest, and rental profits to move above the \$5.2 billion mark in 2020. An aging population plus stable financial conditions propel retirement transfers to greater than \$6.4 billion that same year. Because regional labor demand is forecast to remain strong, unemployment transfers are expected to remain fairly muted throughout the simulation period.

## **EL PASO COMMERCIAL ACTIVITY**

Total commercial activity in El Paso is forecast to exceed \$13.3 billion in 2020 (Table 5). In spite of higher interest rates, car sales are still expected to do well in 2019 and 2020. Furniture and home furnishing sales are also projected to evade many of the effects of tighter credit policy. Restaurants and bars are projected to observe sales volumes that surpass \$1.8 billion by the end of the forecast period.



## **EL PASO RESIDENTIAL CONSTRUCTION & REAL ESTATE**

Total housing starts are estimated to have continued a three-year slide in 2018. The decline is partially attributable to the out-migration of working-aged adults to the Permian Basin and other highly active labor markets. Both residential construction categories are forecast to rebound somewhat in 2019 (Table 6). By 2020, the median price of a resale house is projected to exceed \$153.5 thousand, while the corresponding figure for newly constructed single-family units should reach \$164.5 thousand. Higher mortgage rates combine with higher prices to raise average monthly payments, exclusive of property tax and insurance payments, to \$735. Because of that development, housing affordability erodes further in 2019 and 2020. Not surprisingly, the local pool of qualified borrowers is likely to contract some in coming months, and sales of existing housing units are forecast to decline in both years.

## **EL PASO NONRESIDENTIAL CONSTRUCTION & APARTMENT RENTS**

Following a record-setting year in 2017, nonresidential construction permits are expected to decline by 18.8 percent to just under \$902 million in 2018 (Table 7). Additional decreases are forecast for 2019 and 2020, with total permits falling to just below \$793 million in the latter year. By historical norms, that volume of nonresidential construction activity still represents a strong volume of activity for this building category. Downtown revitalization projects plus new retail and entertainment investment throughout the metropolitan area contribute to this outlook. Ongoing domestic out-migration softens the demand for multi-family housing throughout the forecast period. That causes apartment rents to lag behind inflation for all floor-plans summarized in Table 7.

## **EL PASO AIR TRANSPORTATION**

Passenger volumes at El Paso International Airport (EPIA) are predicted to expand for a third consecutive year in 2019 (Table 8). Regional and national income growth, along with low unemployment, contributed to this simulation outcome. Moreover, increases in the numbers of commercial flights, plus seats, increased EPIA aggregate passenger capacity. In spite of the greater number of daily flights, ticket prices are projected to increase in 2018 and reach an all-time high in 2020. In-bound and out-bound cargo

expanded sharply in 2018. Total air freight volumes are forecast to remain above the 100 thousand-ton mark for the entire simulation period.

## **INTERNATIONAL BRIDGE TRAFFIC**

Total northbound pedestrian crossings are projected to remain above the 7 million mark for three consecutive years for the first time since the onslaught of the Great Recession (Table 9). In a similar development, total passenger vehicle traffic crossed the 13 million threshold in 2017, a level not achieved since 2008. Steady growth is projected with the number of automobiles crossing from Ciudad Juárez reaching 13.7 million in 2020. Investments in new infrastructure, technology, and inspection methods have allowed northbound cargo traffic flows to continue to increase in 2018. Record-breaking traffic volumes are predicted for the next two years, with the total number of 18-wheelers expected to reach 840 thousand in 2020.

## **EL PASO HOTEL ACTIVITY**

Borderplex economic expansion continues to fuel major hotel construction and renovation projects in El Paso. The total number of hotels in operation should reach 91 by the end of the forecast period (Table 10). Total room capacity is expected to scale new heights in 2018 and continue to break records through the end of 2020. Advertised room prices decline in 2018, as do actual revenues per room. Higher occupancy rates in 2019 and 2020 cause both measures to improve in those years, with actual revenues per room reaching almost 57 dollars for the first time in this regional market. Those developments help propel total hotel revenues to greater than \$195 million by 2020.

## **EL PASO WATER CONSUMPTION**

Despite somewhat spotty construction activity in El Paso, water accounts are forecast to continue increasing, with total metered connections reaching nearly 243 thousand by 2020 (Table 11). The expansion in water hook-ups requires continued infrastructure investment and likely necessitates additional rate hikes. The projected rate hikes help encourage more efficient water usage. Consequently, usage per capita declines and aggregate consumption growth lags behind the increase in accounts throughout the simulation period. Total usage is forecast to exceed 35.4 billion gallons by 2020. That volume is, however, lower than what was consumed in 2013 with a smaller customer base of approximately 213.6 thousand accounts.

## **CIUDAD JUÁREZ ECONOMIC ACTIVITY**

Population growth in Ciudad Juárez is expected to accelerate as a consequence of greater natural increase and net migration. Over 85 percent of this growth is due to higher natural increase (Table 12). That means that public school enrollments will continue to increase in future years. Healthy population increases also translate into more municipal water accounts, electricity accounts, and vehicle registrations. Formal sector employment growth decelerates in 2019 due to the impacts of higher interest rates on manufacturing and potential adjustment pains associated with new central government policy innovations. By 2020, however, total formal sector employment should move beyond 450 thousand (Table 13). Greater currency market stability should translate into substantially higher dollar denominated wages for IMMEX manufacturing. Aggregate electricity usage is expected to reach almost 4,460 gigawatt hours as the number of customer accounts breaches 455 thousand meters in 2020.

## **CHIHUAHUA CITY ECONOMIC ACTIVITY**

Natural increase has become the primary driver of demographic expansion in Chihuahua City, also. By 2020, the state capital population is projected to exceed 927 thousand (Table 14). A temporary dip in labor demand causes net migration to turn negative in 2019. Vehicle registration growth continues to outpace population by a substantial margin as income performance remains healthy. Against that backdrop, the rates of change for post-secondary enrollments at local universities and the customer base of the municipal water system also exceed that of the urban populace. Total formal sector employment is forecast to increase to nearly 265 thousand by 2020. Much of that is due to ongoing commercial sector expansion (Table 15). Municipal electricity meters are expected to eclipse the 355 thousand mark by 2020. With total gigawatt hour usage in excess of 3,164 that year, the pressure to raise electricity rates will remain firmly in place.

## **LAS CRUCES ECONOMIC CONDITIONS**

Annual population growth in Las Cruces slowed to a rate of less than 1.0 percent in 2012 and is forecast to continue at below that tempo for the complete outlook period (Table 16). Much of that relatively slow pace is due to local labor market lethargy and worker migration from the Mesilla Valley to energy producing destinations such as Hobbs or Carlsbad.

Business bankruptcies have increased somewhat in recent years and are likely to rise further as monetary policy tightens. Attempts to bolster enrollment at Doña Ana Community College are expected to begin to reverse seven years of falling matriculation levels in 2019. At NMSU, enrollment has waned for eight consecutive years and a slight recovery is also projected to begin in 2019. Real gross metropolitan product is forecast to grow at rates that achieve at least incremental increases on a per capita basis. Las Cruces employment is projected to accelerate in 2019 and 2020 (Table 17). Sectors with the fastest rates of job growth include construction, lodging and food services, healthcare and social services, temporary help agencies, and call centers. Reflective of those expected developments, aggregate personal income is projected to surpass \$8 billion by the end of the simulation period (Table 18).

## **FORECAST RISKS**

Various economic threats associated with natural disasters, trade wars, and policy inconsistencies dominated business headlines during 2018. Other economic headwinds facing the national and regional economies include rising interest rates that affect household, corporate, and public sector debt service payments. Approval of the new USMCA trade agreement has stabilized the regional outlook and reduced the threat of continental supply chain link ruptures that would have likely resurrected 1970s-style stagflation. Unfortunately, the large array of downside risks facing the United States, Mexico, and the border region result in a greater-than-usual probability that the forecasts presented in this report may prove overly optimistic.

## **HISTORICAL AND FORECAST DATA**

Tables 1 through 18 summarize the numerical results from the short-term forecast simulation to 2020 using the UTEP Borderplex Econometric Forecasting Model. Forecasts for El Paso and Las Cruces income and employment begin in 2017. Forecasts for all other data series begin in 2018. At present, the model is comprised by 250 equations covering all of the categories listed in the tables. Suggestions and requests for upcoming volumes 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.

**TABLE 1**  
MAJOR INDICATORS

**TABLE 2**  
EL PASO DEMOGRAPHICS

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**TABLE 12**  
CIUDAD JUÁREZ DEMOGRAPHIC INDICATORS

**TABLE 13**  
CIUDAD JUÁREZ ECONOMIC INDICATORS

**TABLE 14**  
CHIHUAHUA CITY DEMOGRAPHIC INDICATORS

**TABLE 15**  
CHIHUAHUA CITY ECONOMIC INDICATORS

**TABLE 16**  
LAS CRUCES DEMOGRAPHIC & OTHER INDICATORS

**TABLE 17**  
LAS CRUCES EMPLOYMENT

**TABLE 18**  
LAS CRUCES PERSONAL INCOME

### Table 1: Major Indicators

	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020
El Paso Population	803.641	819.471	830.853	831.218	834.190	833.783	837.918	840.410	844.409	849.031	853.840
% change	2.1	2.0	1.4	0.0	0.4	0.0	0.5	0.3	0.5	0.5	0.6
El Paso Net Migration	7.656	6.787	2.258	-8.360	-5.411	-8.632	-3.636	-5.188	-3.548	-2.816	-2.533
El Paso Natural Increase	9.226	9.043	9.124	8.725	8.383	8.225	7.771	7.680	7.547	7.438	7.342
El Paso Automobile Registrations	589.193	597.092	615.285	626.930	641.825	657.944	660.861	671.024	682.837	690.837	700.838
% change	3.2	1.3	3.0	1.9	2.4	2.5	0.4	1.5	1.8	1.2	1.4
El Paso Personal Income	22588.7	24083.1	25211.3	24741.2	26017.3	26957.5	27612.6	28972.5	30191.4	31612.0	33008.7
% change	8.4	6.6	4.7	-1.9	5.2	3.6	2.4	4.9	4.2	4.7	4.4
El Paso Total Employment	388.493	401.327	404.924	409.340	414.002	422.328	429.271	435.022	443.962	449.960	455.134
% change	1.8	3.3	0.9	1.1	1.1	2.0	1.6	1.3	2.1	1.4	1.1
El Paso Unemployment Rate	9.5	10.3	9.3	8.8	6.5	5.2	5.0	4.6	4.4	4.6	4.8
El Paso Gross Metropolitan Product	23.541	24.318	24.892	24.746	24.330	24.841	25.380	26.123	27.034	27.140	27.686
% change	6.3	3.3	2.4	-0.6	-1.7	2.1	2.2	2.9	3.5	0.4	2.0
El Paso Commercial Activity	9474.9	10106.0	10633.1	11007.8	11426.6	11358.8	11621.1	11870.5	12409.4	12861.3	13309.6
% change	9.8	6.7	5.2	3.5	3.8	-0.6	2.3	2.1	4.5	3.6	3.5
El Paso Per Capita Personal Income	28.108	29.389	30.344	29.765	31.189	32.332	32.954	34.474	35.754	37.233	38.659
USA Per Capita Personal Income	40.236	42.428	44.223	44.418	46.426	48.384	49.213	50.371	52.080	54.422	56.738
Ciudad Juarez Total Employment	312.920	313.994	335.806	345.732	376.040	408.607	423.283	434.773	440.720	443.811	451.291
% change	3.5	0.3	6.9	3.0	8.8	8.7	3.6	2.7	1.4	0.7	1.7
Chihuahua City Total Employment	188.172	197.584	214.381	218.408	223.640	235.534	243.139	252.539	258.736	260.857	264.859
% change	6.7	5.0	8.5	1.9	2.4	5.3	3.2	3.9	2.5	0.8	1.5
Las Cruces Total Employment	95.698	97.360	97.153	98.994	99.358	99.931	101.736	101.083	101.828	103.354	105.181
% change	0.5	1.7	-0.2	1.9	0.4	0.6	1.8	-0.6	0.7	1.5	1.8

Notes:

1. All demographic, vehicle registration, and employment data are in thousands.
2. Total personal income and commercial activity data are reported in millions of dollars.
3. Per capita personal income data are in thousands of dollars.
4. El Paso unemployment rate data are reported in annual average percentages.
5. Real gross metropolitan product for the El Paso Metropolitan Statistical Area is reported in billions of 2009 dollars.

## Table 2: El Paso Demographics

	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020
Population	803.641	819.471	830.853	831.218	834.190	833.783	837.918	840.410	844.409	849.031	853.840
% change	2.1	2.0	1.4	0.0	0.4	0.0	0.5	0.3	0.5	0.5	0.6
Resident Births	13.792	13.892	13.873	13.569	13.567	13.521	12.986	12.980	12.880	12.808	12.749
% change	-1.3	0.7	-0.1	-2.2	0.0	-0.3	-4.0	0.0	-0.8	-0.6	-0.5
Resident Deaths	4.566	4.849	4.749	4.844	5.184	5.296	5.215	5.300	5.333	5.370	5.407
% change	1.9	6.2	-2.1	2.0	7.0	2.2	-1.5	1.6	0.6	0.7	0.7
Net Migration	7.656	6.787	2.258	-8.360	-5.411	-8.632	-3.636	-5.188	-3.548	-2.816	-2.533
Domestic Migration	-0.222	5.117	-0.333	-12.696	-8.396	-12.739	-6.540	-7.411	-6.021	-5.432	-5.189
International Migration	7.878	1.670	2.591	4.336	2.985	4.107	2.904	2.223	2.473	2.616	2.656
Households	259.642	266.087	269.537	269.572	269.808	269.883	272.176	274.318	276.784	277.703	280.669
% change	2.7	2.5	1.3	0.0	0.1	0.0	0.8	0.8	0.9	0.3	1.1
Automobile Registrations	589.193	597.092	615.285	626.930	641.825	657.944	660.861	671.024	682.837	690.837	700.838
% change	3.2	1.3	3.0	1.9	2.4	2.5	0.4	1.5	1.8	1.2	1.4
Civilian Labor Force	403.146	417.137	413.454	417.278	412.636	415.525	422.892	427.113	435.871	443.479	449.880
% change	1.6	3.5	-0.9	0.9	-1.1	0.7	1.8	1.0	2.1	1.7	1.4
Business Establishments	13.356	13.494	13.745	13.814	13.875	14.178	14.393	14.600	14.639	14.683	14.739
% change	1.3	1.0	1.9	0.5	0.4	2.2	1.5	1.4	0.3	0.3	0.4
Commercial Sector Estabs.	10.068	10.262	10.271	10.302	10.238	10.528	10.653	10.767	10.844	10.893	10.952
% change	3.4	1.9	0.1	0.3	-0.6	2.8	1.2	1.1	0.7	0.5	0.5
Business Bankruptcies	104	105	89	82	68	57	66	49	58	68	67
% change	-3.7	1.0	-15.2	-7.9	-17.1	-16.2	15.8	-25.8	18.4	17.2	-1.5
Personal Bankruptcies	2645	2462	2389	2111	2036	1984	2060	2108	1941	1949	1886
% change	-6.0	-6.9	-3.0	-11.6	-3.6	-2.6	3.8	2.3	-7.9	0.4	-3.2
UTEP Fall Enrollment	22.106	22.640	22.749	23.003	23.079	23.397	23.922	25.078	25.151	25.497	25.751
% change	5.2	2.4	0.5	1.1	0.3	1.4	2.2	4.8	0.3	1.4	1.0
EPCC Fall Enrollment	29.463	30.475	30.227	28.570	27.862	28.411	29.161	28.339	28.801	29.120	29.328
% change	7.5	3.4	-0.8	-5.5	-2.5	2.0	2.6	-2.8	1.6	1.1	0.7

Notes:

1. Business and personal bankruptcy data reported in actual units; all other data are reported in thousands.

2. Household data are for the El Paso Metropolitan Statistical Area.

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

	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020
Civilian Labor Force	403,146	417,137	413,454	417,278	412,636	415,525	422,892	427,113	435,871	443,479	449,880
% change	1.6	3.5	-0.9	0.9	-1.1	0.7	1.8	1.0	2.1	1.7	1.4
Unemployment Rate	9.5	10.3	9.3	8.8	6.5	5.2	5.0	4.6	4.4	4.6	4.8
Total Employment	388,493	401,327	404,924	409,340	414,002	422,328	429,271	435,022	443,962	449,960	455,134
% change	1.8	3.3	0.9	1.1	1.1	2.0	1.6	1.3	2.1	1.4	1.1
Manufacturing	18,125	19,270	19,615	19,982	18,965	18,967	18,926	18,772	18,614	18,472	18,399
% change	-5.0	6.3	1.8	1.9	-5.1	0.0	-0.2	-0.8	-0.8	-0.8	-0.4
El Paso Construction	25,834	24,810	23,564	23,530	23,487	24,053	24,962	25,814	26,851	27,165	27,430
% change	-1.9	-4.0	-5.0	-0.1	-0.2	2.4	3.8	3.4	4.0	1.2	1.0
Transportation & Warehousing	17,576	17,874	18,473	18,530	18,948	20,436	21,795	22,062	22,199	22,357	22,564
% change	-1.4	1.7	3.4	0.3	2.3	7.9	6.7	1.2	0.6	0.7	0.9
Finance, Insurance & Real Estate	28,345	30,208	30,243	30,499	29,796	30,807	31,644	31,766	32,717	33,438	33,960
% change	0.3	6.6	0.1	0.8	-2.3	3.4	2.7	0.4	3.0	2.2	1.6
Retail Trade Employment	42,025	43,361	44,092	45,484	47,049	47,041	48,031	48,433	48,876	49,128	49,255
% change	1.1	3.2	1.7	3.2	3.4	0.0	2.1	0.8	0.9	0.5	0.3
Hotels & Food Services	29,080	30,697	31,217	32,002	33,512	34,395	35,423	36,065	36,954	37,741	38,367
% change	3.5	5.6	1.7	2.5	4.7	2.6	3.0	1.8	2.5	2.1	1.7
Healthcare & Social Services	38,121	39,772	40,702	41,613	42,710	44,752	46,340	48,060	49,374	50,646	51,913
% change	2.8	4.3	2.3	2.2	2.6	4.8	3.5	3.7	2.7	2.6	2.5
Professional & Technical Services	13,915	14,077	14,103	14,315	14,198	14,472	14,653	14,539	15,100	15,271	15,520
% change	2.3	1.2	0.2	1.5	-0.8	1.9	1.3	-0.8	3.9	1.1	1.6
Temporary Help & Call Centers	31,884	31,668	29,434	29,735	30,848	30,766	31,206	31,596	32,081	32,722	33,322
% change	0.8	-0.7	-7.1	1.0	3.7	-0.3	1.4	1.2	1.5	2.0	1.8
Local Government	45,199	45,107	44,880	45,261	45,154	45,396	45,736	46,308	46,797	47,150	47,580
% change	1.0	-0.2	-0.5	0.8	-0.2	0.5	0.7	1.3	1.1	0.8	0.9
State Government	9,422	9,472	10,083	9,691	8,862	9,175	9,836	10,057	10,066	10,069	10,104
% change	6.6	0.5	6.5	-3.9	-8.6	3.5	7.2	2.2	0.1	0.0	0.3
Federal Civilian Govt.	12,542	12,869	13,099	12,824	12,492	12,613	12,630	12,708	12,798	12,796	12,801
% change	7.4	2.6	1.8	-2.1	-2.6	1.0	0.1	0.6	0.7	0.0	0.0
Military Employment	23,713	27,225	29,921	28,922	28,222	28,514	27,312	27,449	27,297	27,017	26,859
% change	13.3	14.8	9.9	-3.3	-2.4	1.0	-4.2	0.5	-0.6	-1.0	-0.6
Not Elsewhere Classified	52,712	54,917	55,498	56,952	59,759	60,941	60,777	61,393	64,238	65,988	67,060
% change	1.2	4.2	1.1	2.6	4.9	2.0	-0.3	1.0	4.6	2.7	1.6

Notes:

1. Labor force and employment data are in thousands; unemployment rate data are in percentages.
2. Not Elsewhere Classified includes communications, arts and entertainment, private education and wholesale trade.



**Table 4: El Paso Personal Income**

	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020
Total Personal Income	22588.7	24083.1	25211.3	24741.2	26017.3	26957.5	27612.6	28972.5	30191.4	31612.0	33008.7
% change	8.4	6.6	4.7	-1.9	5.2	3.6	2.4	4.9	4.2	4.7	4.4
Wages and Salaries	10964.8	11525.0	12085.0	12191.8	12631.9	13142.6	13462.1	14138.1	14775.3	15455.0	16179.1
% change	5.0	5.1	4.9	0.9	3.6	4.0	2.4	5.0	4.5	4.6	4.7
Other Labor Income	2286.2	2397.8	2569.6	2616.2	2651.7	2835.4	2842.4	2978.0	3110.5	3259.8	3405.3
% change	10.0	4.9	7.2	1.8	1.4	6.9	0.2	4.8	4.4	4.8	4.5
Proprietor Incomes	1991.2	2108.7	2003.6	1680.0	1777.1	1753.0	1773.7	1877.2	1971.3	2057.3	2125.5
% change	30.1	5.9	-5.0	-16.2	5.8	-1.4	1.2	5.8	5.0	4.4	3.3
Social Ins. Contributions	820.9	677.4	695.5	891.4	923.9	961.5	1009.2	1062.0	1103.9	1155.4	1217.5
% change	6.1	-17.5	2.7	28.2	3.6	4.1	5.0	5.2	3.9	4.7	5.4
Residence Adjustments	-350.9	-359.7	-397.0	-367.4	-370.5	-433.5	-416.7	-404.9	-409.9	-413.9	-416.8
% change	2.5	2.5	10.4	-7.5	0.8	17.0	-3.9	-2.8	1.2	1.0	0.7
Dividends, Int., Rent	3104.7	3475.1	4082.8	3785.1	4234.6	4259.2	4360.1	4565.8	4789.8	5018.4	5210.1
% change	1.5	11.9	17.5	-7.3	11.9	0.6	2.4	4.7	4.9	4.8	3.8
Retirement Transfers	4177.8	4374.1	4343.3	4536.9	4886.9	5246.2	5507.4	5741.1	5888.9	6172.4	6449.9
% change	11.7	4.7	-0.7	4.5	7.7	7.4	5.0	4.2	2.6	4.8	4.5
Inc. Maint. Transfers	1000.3	1029.8	1037.3	1047.1	1041.3	1021.2	999.8	1042.3	1072.4	1119.5	1171.7
% change	9.4	2.9	0.7	0.9	-0.6	-1.9	-2.1	4.3	2.9	4.4	4.7
Unemployment Transfers	235.3	209.6	182.1	142.8	88.3	94.7	92.9	96.9	97.0	98.9	101.5
% change	20.9	-10.9	-13.1	-21.6	-38.2	7.2	-1.9	4.3	0.1	2.0	2.6

## 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 temporary assistance for needy families and other payments.
5. Unemployment transfer payments include unemployment insurance payments to individuals.

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

	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020
Total	9474.9	10106.0	10633.1	11007.8	11426.6	11358.8	11621.1	11870.5	12409.4	12861.3	13309.6
% change	9.8	6.7	5.2	3.5	3.8	-0.6	2.3	2.1	4.5	3.6	3.5
Motor Vehicles & Parts	1289.8	1489.1	1641.2	1901.5	1937.3	1943.0	2347.5	2356.2	2456.9	2551.4	2653.8
% change	17.5	15.5	10.2	15.9	1.9	0.3	20.8	0.4	4.3	3.8	4.0
Furniture & Home Furnishings	187.2	185.0	188.4	212.4	232.3	251.8	251.8	259.0	271.2	280.8	293.8
% change	12.6	-1.2	1.8	12.7	9.4	8.4	0.0	2.9	4.7	3.5	4.6
Electronics & Appliances	298.6	286.2	282.9	267.2	250.6	327.8	229.1	242.3	254.3	258.4	269.7
% change	4.7	-4.2	-1.2	-5.5	-6.2	30.8	-30.1	5.8	5.0	1.6	4.4
Building & Garden Supplies	505.0	506.6	529.1	534.5	525.6	545.3	586.4	618.1	642.3	663.8	685.9
% change	8.5	0.3	4.4	1.0	-1.7	3.7	7.5	5.4	3.9	3.3	3.3
Food & Beverage Stores	925.6	982.3	928.1	929.4	955.3	904.4	789.7	835.3	865.0	887.6	910.2
% change	5.4	6.1	-5.5	0.1	2.8	-5.3	-12.7	5.8	3.6	2.6	2.5
Health & Personal Care	487.2	512.5	499.4	515.5	569.6	578.5	609.6	618.1	640.6	667.6	689.2
% change	3.3	5.2	-2.6	3.2	10.5	1.6	5.4	1.4	3.6	4.2	3.2
Gasoline Stations	1073.0	1245.5	1403.2	1352.0	1430.3	1124.4	1129.4	1166.8	1252.0	1320.0	1349.7
% change	20.8	16.1	12.7	-3.6	5.8	-21.4	0.4	3.3	7.3	5.4	2.3
Clothing & Accessories	645.3	612.2	644.0	680.0	692.1	672.4	637.4	619.7	672.1	681.1	700.8
% change	18.3	-5.1	5.2	5.6	1.8	-2.8	-5.2	-2.8	8.5	1.3	2.9
Sporting Goods, Books & Music	192.5	192.7	211.5	215.2	212.0	213.6	203.2	205.6	214.2	222.4	230.5
% change	-1.8	0.1	9.8	1.7	-1.5	0.8	-4.9	1.2	4.2	3.8	3.6
Gen. Merch. & Warehouse Clubs	2215.3	2358.9	2455.9	2528.1	2621.5	2643.0	2578.0	2639.3	2737.1	2828.9	2922.4
% change	5.7	6.5	4.1	2.9	3.7	0.8	-2.5	2.4	3.7	3.4	3.3
Florist, Gift, Pet & Miscellaneous	508.7	499.4	508.1	506.8	510.6	596.7	545.0	572.1	595.5	614.8	638.1
% change	4.0	-1.8	1.7	-0.3	0.7	16.9	-8.7	5.0	4.1	3.2	3.8
Nonstore Retailers	62.8	102.5	118.6	133.9	163.0	135.3	147.3	146.5	153.6	157.9	163.6
% change	7.4	63.2	15.7	12.9	21.7	-17.0	8.9	-0.5	4.8	2.8	3.6
Food & Bev. Establishments	1083.9	1133.0	1222.7	1231.3	1326.4	1422.6	1566.7	1591.3	1654.5	1726.6	1801.9
% change	9.3	4.5	7.9	0.7	7.7	7.3	10.1	1.6	4.0	4.4	4.4

## Notes:

1. All sales figures are expressed in millions of dollars.
2. All data correspond to the North American Industrial Classification System (NAICS).

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

	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020
Total Housing Starts	4.144	4.046	4.054	3.704	2.841	3.693	3.373	3.088	2.872	3.392	3.363
% change	38.3	-2.4	0.2	-8.6	-23.3	30.0	-8.7	-8.4	-7.0	18.1	-0.9
Single-Family Starts	2.970	3.223	3.197	2.588	2.278	2.644	2.452	2.547	2.437	2.502	2.571
% change	13.8	8.5	-0.8	-19.0	-12.0	16.1	-7.3	3.9	-4.3	2.7	2.8
Multi-Family Starts	1.174	0.823	0.857	1.116	0.563	1.049	0.921	0.541	0.435	0.890	0.792
% change	203.4	-29.9	4.1	30.2	-49.6	86.3	-12.2	-41.3	-19.6	104.6	-11.0
Total Housing Stock	268.259	274.801	278.935	282.858	286.754	290.020	294.833	298.715	301.789	305.362	308.746
% change	2.8	2.4	1.5	1.4	1.4	1.1	1.7	1.3	1.0	1.2	1.1
Single-Family Stock	190.129	194.164	196.696	199.650	202.579	205.002	207.101	209.559	211.810	214.105	216.492
% change	3.2	2.1	1.3	1.5	1.5	1.2	1.0	1.2	1.1	1.1	1.1
Multi-Family Stock	78.130	80.637	82.239	83.208	84.175	85.018	87.732	89.156	89.979	91.257	92.254
% change	1.8	3.2	2.0	1.2	1.2	1.0	3.2	1.6	0.9	1.4	1.1
Median New Price	135.657	136.344	137.503	142.399	150.398	150.247	147.901	148.767	155.235	159.313	164.503
% change	1.1	0.5	0.9	3.6	5.6	-0.1	-1.6	0.6	4.3	2.6	3.3
Median Resale Price	120.714	120.689	124.954	128.527	128.494	131.518	135.152	139.366	144.368	148.107	153.548
% change	1.3	0.0	3.5	2.9	0.0	2.4	2.8	3.1	3.6	2.6	3.7
Average Monthly Payment	587	558	516	549	557	552	572	630	665	708	735
% change	-3.5	-4.9	-7.5	6.4	1.5	-0.9	3.6	10.1	5.6	6.5	3.8
Affordability Index	245.7	255.3	297.0	294.2	297.0	310.9	309.0	292.2	285.8	277.3	269.7
% change	1.6	3.9	16.3	-0.9	1.0	4.7	-0.6	-5.4	-2.2	-3.0	-2.7
Existing Units Sold	13.382	13.838	14.645	15.007	15.096	15.104	15.061	17.095	16.479	15.844	15.257
% change	-1.7	3.4	5.8	2.5	0.6	0.1	-0.3	13.5	-3.6	-3.9	-3.7

## Notes:

1. Housing start and stock data are in thousands.
2. Median new and existing home prices are for stand-alone units and quoted in thousands of dollars.
3. Average monthly mortgage payment is in current dollars.
4. Affordability index increases as household income strengthens relative to mortgage payments.
5. Existing housing units sold (in thousands) includes both stand-alone and multi-family units.
6. The data in Table 6 are for the El Paso Metropolitan Statistical Area.

**Table 7: El Paso Nonresidential Construction & Apartment Rents**

	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020
Total Nonresidential Space	584.353	181.303	532.773	457.819	494.255	1064.680	808.192	1110.292	901.996	874.457	792.855
% change	19.2	-69.0	193.9	-14.1	8.0	115.4	-24.1	37.4	-18.8	-3.1	-9.3
Industrial Space Permits	1.875	2.784	0.157	4.118	2.688	10.973	15.944	21.222	14.490	12.411	10.730
% change	-56.7	48.5	-94.4	2522.9	-34.7	308.2	45.3	33.1	-31.7	-14.3	-13.5
Office Space Permit Values	21.330	13.460	19.479	24.869	28.432	172.609	30.058	52.242	42.361	44.530	39.941
% change	150.8	-36.9	44.7	27.7	14.3	507.1	-82.6	73.8	-18.9	5.1	-10.3
Other Commercial Space	224.007	91.103	243.711	304.958	361.394	765.064	653.078	685.163	606.958	557.444	519.157
% change	-23.0	-59.3	167.5	25.1	18.5	111.7	-14.6	4.9	-11.4	-8.2	-6.9
Miscellaneous Nonres.	337.141	73.956	269.425	123.873	101.741	116.033	109.111	351.665	238.188	260.072	223.028
% change	80.7	-78.1	264.3	-54.0	-17.9	14.0	-6.0	222.3	-32.3	9.2	-14.2
0-Bedroom Unit Rent	488	521	523	553	588	552	546	602	601	612	618
% change	4.3	6.8	0.4	5.7	6.3	-6.1	-1.1	10.3	-0.2	1.8	1.0
1-Bedroom Unit Rent	523	559	572	605	643	669	685	658	665	667	671
% change	4.2	6.9	2.3	5.8	6.3	4.0	2.4	-3.9	1.1	0.3	0.6
2-Bedroom Unit Rent	623	666	706	747	794	817	834	812	814	816	820
% change	4.2	6.9	6.0	5.8	6.3	2.9	2.1	-2.6	0.2	0.2	0.5
3-Bedroom Unit Rent	893	955	1001	1059	1125	1164	1203	1151	1151	1155	1157
% change	4.1	6.9	4.8	5.8	6.2	3.5	3.4	-4.3	0.0	0.3	0.2
4-Bedroom Unit Rent	1060	1133	1200	1270	1350	1386	1435	1381	1387	1391	1395
% change	4.2	6.9	5.9	5.8	6.3	2.7	3.5	-3.8	0.4	0.3	0.3

## 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 permits include port facilities, recreational buildings, sports stadiums, swimming pools, and health care facilities.
4. All apartment rent data are reported in nominal dollars per month.

**Table 8: El Paso International Airport**

	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020
Passenger Arrivals	1520.9	1467.6	1438.5	1375.3	1383.1	1380.2	1395.1	1457.7	1559.8	1599.0	1622.5
% change	-0.1	-3.5	-2.0	-4.4	0.6	-0.2	1.1	4.5	7.0	2.5	1.5
Domestic Arrivals	1520.9	1467.6	1438.5	1375.3	1383.1	1380.2	1395.1	1457.7	1559.8	1599.0	1622.5
% change	-0.1	-3.5	-2.0	-4.4	0.6	-0.2	1.1	4.5	7.0	2.5	1.5
International Arrivals	0	0	0	0	0	0	0	0	0	0	0
% change	0	0	0	0	0	0	0	0	0	0	0
Passenger Departures	1544.5	1480.0	1455.4	1389.4	1395.1	1383.1	1412.7	1471.7	1547.8	1586.1	1610.7
% change	0.3	-4.2	-1.7	-4.5	0.4	-0.9	2.1	4.2	5.2	2.5	1.6
Domestic Departures	1544.5	1480.0	1455.4	1389.4	1395.1	1383.1	1412.7	1471.7	1547.8	1586.1	1610.7
% change	0.3	-4.2	-1.7	-4.5	0.4	-0.9	2.1	4.2	5.2	2.5	1.6
International Departures	0	0	0	0	0	0	0	0	0	0	0
% change	0	0	0	0	0	0	0	0	0	0	0
Average Air Fares	331.60	371.79	381.37	381.63	394.49	406.45	397.72	387.40	397.18	407.37	418.05
% change	10.1	12.1	2.6	0.1	3.4	3.0	-2.1	-2.6	2.5	2.6	2.6
In-Bound Freight & Mail	47.427	47.052	47.769	43.754	42.702	44.579	42.831	43.981	50.253	50.791	51.827
% change	39.0	-0.8	1.5	-8.4	-2.4	4.4	-3.9	2.7	14.3	1.1	2.0
Out-Bound Freight & Mail	43.455	44.455	46.754	44.638	43.776	46.206	42.259	43.145	49.826	50.593	51.405
% change	44.0	2.3	5.2	-4.5	-1.9	5.6	-8.5	2.1	15.5	1.5	1.6

## Notes:

1. El Paso International Airport passenger data are in thousands.
2. El Paso International Airport annual average air fares are reported in nominal dollars.
3. El Paso International Airport air freight and air mail data are in thousand tons.

**Table 9: Northbound International Bridge Traffic**

	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020
Pedestrians, All Bridges	6.931	6.176	6.091	6.079	6.572	6.848	7.033	6.928	7.143	7.249	7.377
% change	-7.5	-10.9	-1.4	-0.2	8.1	4.2	2.7	-1.5	3.1	1.5	1.8
Cars, All Bridges	9.968	9.148	9.463	10.640	11.588	12.258	12.628	13.067	13.264	13.476	13.704
% change	-5.5	-8.2	3.4	12.4	8.9	5.8	3.0	3.5	1.5	1.6	1.7
Trucks, All Bridges	0.708	0.717	0.725	0.741	0.751	0.758	0.766	0.779	0.798	0.815	0.840
% change	11.8	1.3	1.1	2.2	1.3	0.9	1.1	1.7	2.4	2.1	3.1
Cordova Bridge											
BOTA Pedestrians	1.011	0.976	0.879	0.894	0.888	0.940	1.020	1.030	1.191	1.147	1.149
% change	12.1	-3.5	-9.9	1.7	-0.7	5.9	8.5	1.0	15.6	-3.7	0.2
BOTA Personal Vehicles	3.573	3.268	3.281	3.596	3.813	3.860	3.922	3.884	3.977	4.101	4.201
% change	-17.6	-8.5	0.4	9.6	6.0	1.2	1.6	-1.0	2.4	3.1	2.4
BOTA Cargo Vehicles	0.322	0.338	0.315	0.317	0.313	0.497	0.297	0.270	0.270	0.278	0.290
% change	1.6	5.0	-6.8	0.6	-1.3	58.8	-40.2	-9.1	0.0	3.0	4.3
Paso del Norte Bridge											
PDN Pedestrians	4.663	4.004	4.112	4.255	4.620	4.793	4.793	4.601	4.602	4.711	4.801
% change	-13.4	-14.1	2.7	3.5	8.6	3.7	0.0	-4.0	0.0	2.4	1.9
PDN Personal Vehicles	2.340	2.172	2.065	2.333	2.620	2.872	2.771	2.996	3.052	3.114	3.169
% change	16.4	-7.2	-4.9	13.0	12.3	9.6	-3.5	8.1	1.9	2.0	1.8
DCL Personal Vehicles	1.242	1.150	1.192	1.167	1.147	1.204	1.197	1.237	1.265	1.270	1.293
% change	1.9	-7.4	3.7	-2.1	-1.7	5.0	-0.6	3.3	2.3	0.4	1.8
Ysleta Zaragoza Bridge											
Ysleta Pedestrians	1.256	1.196	1.100	0.930	1.064	1.115	1.220	1.296	1.350	1.391	1.427
% change	4.3	-4.8	-8.0	-15.5	14.4	4.8	9.4	6.2	4.2	3.0	2.6
Ysleta Personal Vehicles	2.092	1.857	2.172	2.807	3.239	3.438	3.706	3.844	3.856	3.875	3.923
% change	-12.7	-11.2	17.0	29.2	15.4	6.1	7.8	3.7	0.3	0.5	1.2
Ysleta Cargo Vehicles	0.386	0.380	0.410	0.424	0.438	0.261	0.469	0.509	0.529	0.537	0.550
% change	22.2	-1.6	7.9	3.4	3.3	-40.4	79.7	8.5	3.9	1.5	2.4
DYL Personal Vehicles	0.722	0.701	0.753	0.738	0.770	0.885	1.031	1.106	1.114	1.116	1.117
% change	22.8	-2.9	7.4	-2.0	4.3	14.9	16.5	7.3	0.7	0.2	0.1

**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**

	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020
Hotels in Operation	81	81	79	76	77	79	81	82	88	90	91
% change	3.8	0.0	-2.5	-3.8	1.3	2.6	2.5	1.2	7.3	2.3	1.1
Room Nights Available	3142.9	3197.6	3266.5	3194.4	3191.6	3284.0	3336.4	3286.2	3347.4	3399.1	3429.4
% change	4.3	1.7	2.2	-2.2	-0.1	2.9	1.6	-1.5	1.9	1.5	0.9
Room Nights Sold	2063.1	2185.0	2116.0	2070.0	2124.0	2189.0	2219.4	2156.1	2216.6	2282.3	2339.9
% change	7.5	5.9	-3.2	-2.2	2.6	3.1	1.4	-2.9	2.8	3.0	2.5
Hotel Occupancy Rate	65.6	68.3	64.8	64.8	66.6	66.7	66.5	65.6	66.2	67.1	68.2
Hotel Room Price	70.07	69.50	70.84	71.37	75.33	78.20	79.81	80.86	79.64	80.04	83.49
% change	2.3	-0.8	1.9	0.7	5.5	3.8	2.1	1.3	-1.5	0.5	4.3
Actual Revenue per Room	46.00	47.49	45.89	46.25	50.14	52.12	53.09	53.05	52.74	53.74	56.96
% change	5.4	3.2	-3.4	0.8	8.4	3.9	1.9	-0.1	-0.6	1.9	6.0
Total Revenues	144.562	151.851	149.899	147.729	160.011	171.174	177.140	174.337	176.536	182.667	195.354
% change	9.9	5.0	-1.3	-1.4	8.3	7.0	3.5	-1.6	1.3	3.5	6.9

## 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**

	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020
Total Water Customers	205.489	208.179	210.870	213.561	219.251	223.105	228.087	231.999	235.875	239.365	242.698
% change	1.9	1.3	1.3	1.3	2.7	1.8	2.2	1.7	1.7	1.5	1.4
Single-Family Meters	164.450	169.261	172.609	174.519	176.399	178.803	181.819	183.925	186.681	189.254	191.714
% change	1.8	2.9	2.0	1.1	1.1	1.4	1.7	1.2	1.5	1.4	1.3
Multi-Family Meters	4.750	4.740	4.751	4.747	4.748	4.778	4.860	4.895	4.938	4.972	5.006
% change	-0.4	-0.2	0.2	-0.1	0.0	0.6	1.7	0.7	0.9	0.7	0.7
Commercial Business Meters	10.581	10.055	10.060	10.087	10.097	10.182	10.365	10.528	10.683	10.806	10.935
% change	2.9	-5.0	0.0	0.3	0.1	0.8	1.8	1.6	1.5	1.2	1.2
Industrial Business Meters	0.161	0.163	0.162	0.158	0.153	0.149	0.151	0.146	0.147	0.148	0.149
% change	0.0	1.2	-0.6	-2.5	-3.2	-2.6	1.3	-3.3	0.7	0.7	0.7
Other Meter Connections	25.547	23.960	23.288	24.050	27.854	29.193	30.892	32.505	33.426	34.185	34.894
% change	2.2	-6.2	-2.8	3.3	15.8	4.8	5.8	5.2	2.8	2.3	2.1
Total Water Consumed	34.140	36.997	36.927	35.611	34.289	33.981	34.306	34.280	34.761	35.092	35.432
% change	0.4	8.4	-0.2	-3.6	-3.7	-0.9	1.0	-0.1	1.4	1.0	1.0
Single-Family Gallons	18.722	20.097	19.476	18.672	18.165	17.646	17.872	17.423	17.670	17.858	18.028
% change	0.1	7.3	-3.1	-4.1	-2.7	-2.9	1.3	-2.5	1.4	1.1	1.0
Multi-Family Gallons	3.081	3.147	3.079	2.953	2.817	2.862	2.811	2.770	2.767	2.760	2.755
% change	2.0	2.1	-2.2	-4.1	-4.6	1.6	-1.8	-1.5	-0.1	-0.3	-0.2
Commercial Gallons Cons.	4.122	4.053	4.048	4.158	3.689	3.696	3.749	3.753	3.778	3.776	3.787
% change	3.9	-1.7	-0.1	2.7	-11.3	0.2	1.4	0.1	0.7	-0.1	0.3
Industrial Gallons Consumed	0.247	0.330	0.347	0.387	0.495	0.391	0.424	0.478	0.458	0.435	0.410
% change	0.4	33.6	5.2	11.5	27.9	-21.0	8.4	12.7	-4.2	-5.0	-5.7
Other Water Consumption	7.968	9.371	9.978	9.441	9.123	9.385	9.451	9.856	10.087	10.263	10.451
% change	-1.1	17.6	6.5	-5.4	-3.4	2.9	0.7	4.3	2.3	1.7	1.8

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**

	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020
Ciudad Juarez Population	1332.1	1334.2	1342.1	1354.7	1372.9	1391.2	1408.2	1424.3	1439.6	1458.3	1479.5
% change	-3.3	0.2	0.6	0.9	1.3	1.3	1.2	1.1	1.1	1.3	1.5
Resident Births	26.376	22.949	23.989	23.808	23.970	22.899	21.968	22.517	23.177	23.699	24.112
% change	-11.3	-13.0	4.5	-0.8	0.7	-4.5	-4.1	2.5	2.9	2.3	1.7
Resident Deaths	10.143	8.769	7.116	7.257	7.340	7.423	7.799	8.612	9.536	8.648	8.036
% change	18.5	-13.5	-18.9	2.0	1.1	1.1	5.1	10.4	10.7	-9.3	-7.1
Net Migration	-61.951	-12.137	-8.901	-4.046	1.618	2.805	2.848	2.230	1.590	3.651	5.184
Domestic Migration	-54.073	-10.467	-6.310	0.290	4.603	6.912	5.752	4.453	4.063	6.267	7.840
International Migration	-7.878	-1.670	-2.591	-4.336	-2.985	-4.107	-2.904	-2.223	-2.473	-2.616	-2.656
Ciudad Juarez Water Meters	431.452	436.899	441.464	445.282	449.217	453.536	458.030	462.429	468.964	476.989	485.256
% change	1.4	1.3	1.0	0.9	0.9	1.0	1.0	1.0	1.4	1.7	1.7
Total Water Consumption	143.522	141.042	136.438	137.122	137.948	138.633	141.596	138.829	140.453	142.492	144.279
% change	0.2	-1.7	-3.3	0.5	0.6	0.5	2.1	-2.0	1.2	1.5	1.3
Registered Automobiles	373.082	366.502	375.664	398.359	416.668	432.127	462.806	475.215	481.869	486.937	492.681
% change	4.9	-1.8	2.5	6.0	4.6	3.7	7.1	2.7	1.4	1.1	1.2
Registered Cargo Vehicles	89.969	85.055	85.548	89.015	92.406	94.783	99.628	103.347	104.142	104.752	106.052
% change	3.9	-5.5	0.6	4.1	3.8	2.6	5.1	3.7	0.8	0.6	1.2
UACJ Enrollment	19.222	20.808	23.899	25.916	25.490	26.714	27.951	28.834	29.695	30.548	31.402
% change	1.2	8.3	14.9	8.4	-1.6	4.8	4.6	3.2	3.0	2.9	2.8
ITCJ Enrollment	5.087	5.063	5.268	5.290	6.013	6.510	7.044	7.410	7.697	8.002	8.330
% change	1.6	-0.5	4.0	0.4	13.7	8.3	8.2	5.2	3.9	4.0	4.1

## Notes:

1. All Ciudad Juarez population, water meter, vehicle, and college enrollment data are reported in thousands.
2. Ciudad Juarez water consumption is reported in million cubic meters.
3. UACJ is the acronym for Universidad Autónoma de Ciudad Juarez.
4. ITCJ is the acronym for Instituto Tecnológico de Ciudad Juarez.

**Table 13: Ciudad Juarez Economic Indicators**

	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020
Total Formal Sector Emp.	312.920	313.994	335.806	345.732	376.040	408.607	423.283	434.773	440.720	443.811	451.291
% change	3.5	0.3	6.9	3.0	8.8	8.7	3.6	2.7	1.4	0.7	1.7
Total Mfg. Employment	181.726	186.882	206.128	216.560	241.560	270.099	280.032	286.036	286.113	286.678	289.648
% change	6.3	2.8	10.3	5.1	11.5	11.8	3.7	2.1	0.0	0.2	1.0
Commerce Employment	39.986	38.902	39.259	39.907	41.775	42.383	44.264	46.149	47.480	48.626	49.728
% change	-1.2	-2.7	0.9	1.7	4.7	1.5	4.4	4.3	2.9	2.4	2.3
Regulated Industry Emp.	11.462	11.994	12.363	13.233	14.331	14.890	15.907	17.952	18.553	18.733	19.171
% change	7.3	4.6	3.1	7.0	8.3	3.9	6.8	12.9	3.3	1.0	2.3
Services & Other Emp.	79.746	76.216	78.056	76.032	78.374	81.235	83.080	84.636	88.574	89.774	92.744
% change	-0.7	-4.4	2.4	-2.6	3.1	3.7	2.3	1.9	4.7	1.4	3.3
IMMEX Plants	335	327	325	320	317	318	323	326	327	328	329
% change	-0.3	-2.4	-0.6	-1.5	-0.9	0.3	1.6	0.9	0.3	0.3	0.3
IMMEX Employment	178.417	178.564	188.392	202.476	215.821	243.853	257.453	273.018	277.192	284.690	291.018
% change	12.1	0.1	5.5	7.5	6.6	13.0	5.6	6.0	1.5	2.7	2.2
IMMEX Wages	4.83	4.90	4.82	5.03	4.94	4.25	3.95	4.13	4.17	4.75	5.20
% change	8.1	1.4	-1.6	4.4	-1.8	-14.0	-7.1	4.6	1.0	13.9	9.5
Total Electric Meters	408.743	397.979	393.151	414.720	413.138	414.134	430.570	434.645	440.054	446.917	455.008
% change	1.8	-2.6	-1.2	5.5	-0.4	0.2	4.0	0.9	1.2	1.6	1.8
Total GWH Consumption	3477.7	3456.6	3460.0	3533.6	3699.7	3805.2	3983.0	4213.4	4319.0	4383.7	4458.3
% change	2.2	-0.6	0.1	2.1	4.7	2.9	4.7	5.8	2.5	1.5	1.7

## Notes:

1. Ciudad Juarez employment data and electricity meters are reported in thousands.
2. Ciudad Juarez formal sector jobs are those covered by the social security system in Mexico.
3. Regulated sectors include transportation, communications, and public utilities.
4. IMMEX is a Mexican government program facilitating importation of intermediate goods to be processed and re-exported.
5. IMMEX data are annual averages; the non-IMMEX employment data reflect the number of jobs at the end of the year.
6. IMMEX wages are in nominal dollars per hour.
7. Ciudad Juarez total electricity consumption data are reported in gigawatt hours.

**Table 14: Chihuahua City Demographic Indicators**

	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020
Chihuahua City Population	819.543	832.862	846.181	857.949	868.986	878.062	887.666	896.750	906.032	914.146	927.042
% change	0.9	1.6	1.6	1.4	1.3	1.0	1.1	1.0	1.0	0.9	1.4
Chihuahua City Births	15.194	14.762	15.609	15.300	14.882	14.904	14.388	15.734	15.857	15.971	16.080
% change	0.5	-2.8	5.7	-2.0	-2.7	0.1	-3.5	9.4	0.8	0.7	0.7
Chihuahua City Deaths	5.730	5.530	5.666	5.426	5.366	5.405	5.964	6.957	6.903	6.852	6.802
% change	12.6	-3.5	2.5	-4.2	-1.1	0.7	10.3	16.6	-0.8	-0.7	-0.7
Net Migration	-2.411	4.087	3.376	1.894	1.521	-0.423	1.180	0.307	0.328	-1.005	3.618
Chihuahua City Water Meters	284.713	289.724	294.453	299.995	308.131	314.421	319.446	325.611	330.210	334.401	340.005
% change	1.9	1.8	1.6	1.9	2.7	2.0	1.6	1.9	1.4	1.3	1.7
Total Water Consumption	65.575	66.297	66.044	65.257	70.332	72.220	72.019	70.623	70.794	71.663	72.763
% change	0.7	1.1	-0.4	-1.2	7.8	2.7	-0.3	-1.9	0.2	1.2	1.5
Registered Automobiles	263.138	264.347	280.763	311.342	338.533	356.592	391.051	414.833	430.325	442.612	457.027
% change	3.2	0.5	6.2	10.9	8.7	5.3	9.7	6.1	3.7	2.9	3.3
Registered Cargo Vehicles	111.543	107.114	112.299	120.389	126.934	129.302	136.385	140.321	141.854	143.089	144.358
% change	2.9	-4.0	4.8	7.2	5.4	1.9	5.5	2.9	1.1	0.9	0.9
UACH Enrollment	19.214	21.219	22.999	23.062	24.681	24.867	24.919	23.616	23.879	24.147	24.414
% change	1.5	10.4	8.4	0.3	7.0	0.8	0.2	-5.2	1.1	1.1	1.1
ITCH Number 1 Enrollment	7.404	7.049	7.076	7.127	7.045	7.685	8.232	8.120	8.171	8.242	8.321
% change	-1.6	-4.8	0.4	0.7	-1.2	9.1	7.1	-1.4	0.6	0.9	1.0

## 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. UACH is the acronym for Universidad Autónoma de Chihuahua.
4. ITCH Number 1 is the acronym for Instituto Tecnológico de Chihuahua Numero 1.

**Table 15: Chihuahua City Economic Indicators**

	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020
Total Formal Sector Emp.	188.172	197.584	214.381	218.408	223.640	235.534	243.139	252.539	258.736	260.857	264.859
% change	6.7	5.0	8.5	1.9	2.4	5.3	3.2	3.9	2.5	0.8	1.5
Total Mfg. Employment	69.948	76.111	82.546	85.269	83.330	90.491	93.372	97.190	97.450	97.543	98.823
% change	10.3	8.8	8.5	3.3	-2.3	8.6	3.2	4.1	0.3	0.1	1.3
Commerce Employment	40.268	41.765	41.354	43.318	46.050	48.818	51.326	54.398	56.428	58.351	60.254
% change	4.0	3.7	-1.0	4.7	6.3	6.0	5.1	6.0	3.7	3.4	3.3
Regulated Industry Emp.	8.023	8.294	8.657	9.627	10.401	10.889	11.149	12.067	12.558	12.661	12.918
% change	2.5	3.4	4.4	11.2	8.0	4.7	2.4	8.2	4.1	0.8	2.0
Services & Other Emp.	69.933	71.414	81.824	80.194	83.859	85.336	87.292	88.884	92.300	92.302	92.864
% change	5.5	2.1	14.6	-2.0	4.6	1.8	2.3	1.8	3.8	0.0	0.6
IMMEX Plants	93	93	94	95	106	105	107	108	109	109	109
% change	2.2	0.0	1.1	1.1	11.6	-0.9	1.9	0.9	0.9	0.0	0.0
IMMEX Employment	46.475	52.584	60.852	64.758	69.265	71.796	74.464	72.706	69.550	71.434	73.662
% change	26.9	13.1	15.7	6.4	7.0	3.7	3.7	-2.4	-4.3	2.7	3.1
IMMEX Wages	5.27	5.55	5.21	5.68	5.81	4.98	4.59	4.66	4.33	4.79	5.30
% change	1.2	5.3	-6.1	9.0	2.3	-14.3	-7.8	1.5	-7.1	10.6	10.6
Total Electricity Meters	297.605	296.360	301.034	307.221	311.936	316.236	322.763	336.885	345.220	350.782	355.062
% change	1.0	-0.4	1.6	2.1	1.5	1.4	2.1	4.4	2.5	1.6	1.2
Total GWH Consumption	2442.8	2551.4	2580.2	2630.6	2749.6	2823.5	2931.6	2952.4	3040.8	3105.5	3164.1
% change	6.6	4.4	1.1	2.0	4.5	2.7	3.8	0.7	3.0	2.1	1.9

Notes:

1. Chihuahua City employment data and electricity meters are reported in thousands.
2. Chihuahua City formal sector jobs are those covered by the social security system in Mexico.
3. Regulated sectors include transportation, communications, and public utilities.
4. IMMEX is a Mexican government program facilitating importation of intermediate goods to be processed and re-exported.
5. IMMEX data are annual averages; the non-IMMEX employment data reflect the number of jobs at the end of the year.
6. IMMEX wages are in nominal dollars per hour.
7. Chihuahua City total electricity consumption data are reported in gigawatt hours.

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

	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020
Population	210.203	212.869	214.162	213.651	213.536	213.567	214.207	215.579	216.974	218.556	220.388
% change	2.3	1.3	0.6	-0.2	-0.1	0.0	0.3	0.6	0.6	0.7	0.8
Business Establishments	3.610	3.630	3.567	3.554	3.546	3.570	3.615	3.613	3.642	3.681	3.722
% change	-3.2	0.6	-1.7	-0.4	-0.2	0.7	1.3	-0.1	0.8	1.1	1.1
Business Bankruptcies	34	16	19	22	17	17	8	19	21	22	23
% change	9.7	-52.9	18.8	15.8	-22.7	0.0	-52.9	137.5	10.5	4.8	4.5
Personal Bankruptcies	659	522	479	409	464	414	329	377	418	464	492
% change	10.2	-20.8	-8.2	-14.6	13.4	-10.8	-20.5	14.6	10.9	11.0	6.0
NMSU Fall Enrollment	18.552	18.024	17.651	16.765	15.829	15.490	14.852	14.432	14.289	14.300	14.305
% change	0.3	-2.8	-2.1	-5.0	-5.6	-2.1	-4.1	-2.8	-1.0	0.1	0.0
DACC Fall Enrollment	9.821	9.888	9.270	8.837	8.448	8.252	8.157	7.917	7.876	8.011	8.141
% change	11.7	0.7	-6.3	-4.7	-4.4	-2.3	-1.2	-2.9	-0.5	1.7	1.6
Personal Income	6163.4	6361.3	6520.4	6272.7	6538.5	6917.4	7037.1	7165.1	7391.7	7696.0	8009.0
% change	5.0	3.2	2.5	-3.8	4.2	5.8	1.7	1.8	3.2	4.1	4.1
Labor and Proprietor Earnings	3889.8	3912.6	3860.4	3833.1	3886.8	4028.6	4164.3	4252.7	4391.5	4547.2	4718.0
% change	4.9	0.6	-1.3	-0.7	1.4	3.6	3.4	2.1	3.3	3.5	3.8
Real GMP	6.379	6.251	5.965	5.787	5.869	6.005	6.009	6.155	6.202	6.255	6.334
% change	1.8	-2.0	-4.6	-3.0	1.4	2.3	0.1	2.4	0.8	0.9	1.3
Total Employment	95.698	97.360	97.153	98.994	99.358	99.931	101.736	101.083	101.828	103.354	105.181
% change	0.5	1.7	-0.2	1.9	0.4	0.6	1.8	-0.6	0.7	1.5	1.8

## Notes:

1. The Las Cruces metropolitan economy is comprised by Doña Ana County.
2. Population, business establishment, college enrollment, and employment data are expressed 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 2009 dollars.

**Table 17: Las Cruces Employment**

	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020
Las Cruces Total Emp.	95.698	97.360	97.153	98.994	99.358	99.931	101.736	101.083	101.828	103.354	105.181
% change	0.5	1.7	-0.2	1.9	0.4	0.6	1.8	-0.6	0.7	1.5	1.8
Manufacturing	3.205	3.512	3.317	3.218	2.956	2.772	2.885	2.871	2.872	2.887	2.899
% change	-2.5	9.6	-5.6	-3.0	-8.1	-6.2	4.1	-0.5	0.0	0.5	0.4
Construction Employment	5.913	6.091	5.857	5.996	5.959	5.990	6.137	6.124	6.271	6.480	6.652
% change	-3.0	3.0	-3.8	2.4	-0.6	0.5	2.5	-0.2	2.4	3.3	2.7
Transportation & Warehousing	2.446	2.594	2.686	2.579	2.522	2.713	2.872	3.041	3.045	3.084	3.133
% change	-2.4	6.1	3.5	-4.0	-2.2	7.6	5.9	5.9	0.1	1.3	1.6
Finance, Insurance & Real Estate	6.139	6.432	6.361	6.494	6.570	6.740	6.824	6.733	6.825	6.930	7.052
% change	-4.0	4.8	-1.1	2.1	1.2	2.6	1.2	-1.3	1.4	1.5	1.8
Retail Trade Employment	8.840	9.273	9.363	9.530	9.618	9.599	9.595	9.680	9.703	9.830	10.048
% change	-0.1	4.9	1.0	1.8	0.9	-0.2	0.0	0.9	0.2	1.3	2.2
Hotels & Food Services	6.816	6.983	7.097	7.591	7.658	7.787	8.183	8.267	8.181	8.350	8.573
% change	1.2	2.5	1.6	7.0	0.9	1.7	5.1	1.0	-1.0	2.1	2.7
Healthcare & Social Services	13.413	14.428	14.839	14.744	15.064	15.650	16.393	16.681	17.049	17.396	17.767
% change	2.6	7.6	2.8	-0.6	2.2	3.9	4.7	1.8	2.2	2.0	2.1
Professional & Technical Services	5.727	5.272	5.359	5.945	5.694	5.944	5.957	5.605	5.600	5.646	5.770
% change	6.5	-7.9	1.7	10.9	-4.2	4.4	0.2	-5.9	-0.1	0.8	2.2
Temporary Help & Call Centers	5.019	5.025	5.010	5.221	5.506	4.859	4.780	4.640	4.745	4.907	5.044
% change	8.0	0.1	-0.3	4.2	5.5	-11.8	-1.6	-2.9	2.3	3.4	2.8
State Government	8.849	8.452	8.174	8.130	8.229	8.197	8.345	7.885	7.820	7.862	7.947
% change	-1.4	-4.5	-3.3	-0.5	1.2	-0.4	1.8	-5.5	-0.8	0.5	1.1
Local Government	8.631	8.630	8.634	8.693	8.742	8.726	8.610	8.458	8.519	8.601	8.709
% change	-1.0	0.0	0.0	0.7	0.6	-0.2	-1.3	-1.8	0.7	1.0	1.3
Federal Civilian Govt.	4.274	4.062	3.881	3.756	3.632	3.516	3.472	3.410	3.442	3.457	3.477
% change	5.4	-5.0	-4.5	-3.2	-3.3	-3.2	-1.3	-1.8	0.9	0.4	0.6
Military Employment	0.590	0.595	0.594	0.592	0.552	0.560	0.558	0.561	0.559	0.556	0.554
% change	1.7	0.8	-0.2	-0.3	-6.8	1.4	-0.4	0.5	-0.4	-0.5	-0.4
Not Elsewhere Classified	15.836	16.011	15.981	16.505	16.656	16.878	17.125	17.127	17.197	17.368	17.556
% change	-0.7	1.1	-0.2	3.3	0.9	1.3	1.5	0.0	0.4	1.0	1.1

## Notes:

1. Employment data are expressed in thousands.
2. Not Elsewhere Classified includes communications, arts and entertainment, private education and wholesale trade.

**Table 18: Las Cruces Personal Income**

	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020
Total Personal Income	6163.4	6361.3	6520.4	6272.7	6538.5	6917.4	7037.1	7165.1	7391.7	7696.0	8009.0
% change	5.0	3.2	2.5	-3.8	4.2	5.8	1.7	1.8	3.2	4.1	4.1
Wages and Salaries	2608.0	2623.7	2660.8	2711.0	2777.4	2855.3	2915.1	2974.5	3086.6	3203.9	3329.4
% change	2.4	0.6	1.4	1.9	2.4	2.8	2.1	2.0	3.8	3.8	3.9
Other Labor Income	554.1	581.9	604.5	572.9	563.7	569.9	619.6	630.7	629.5	641.3	661.2
% change	7.4	5.0	3.9	-5.2	-1.6	1.1	8.7	1.8	-0.2	1.9	3.1
Proprietor Incomes	727.7	707.0	595.1	549.2	545.7	603.5	629.6	647.4	675.4	702.0	727.4
% change	12.5	-2.8	-15.8	-7.7	-0.6	10.6	4.3	2.8	4.3	3.9	3.6
Social Ins. Contributions	241.4	194.2	195.7	251.3	259.4	270.5	281.9	288.2	299.7	311.1	326.2
% change	2.2	-19.6	0.8	28.4	3.2	4.3	4.2	2.2	4.0	3.8	4.9
Residence Adjustments	17.9	21.3	60.5	27.8	16.0	46.5	2.8	2.7	4.1	6.5	9.3
% change	-18.6	19.0	184.0	-54.0	-42.4	190.6	-94.0	-3.6	51.9	58.5	43.1
Dividends, Int., Rent	868.0	966.9	1147.8	1014.5	1081.6	1137.4	1167.0	1187.4	1232.9	1287.3	1346.0
% change	-0.5	11.4	18.7	-11.6	6.6	5.2	2.6	1.7	3.8	4.4	4.6
Retirement Transfers	1302.2	1329.3	1332.2	1345.3	1525.8	1681.1	1694.4	1716.2	1759.3	1844.0	1921.3
% change	5.7	2.1	0.2	1.0	13.4	10.2	0.8	1.3	2.5	4.8	4.2
Inc. Maint. Transfers	251.4	259.5	263.7	265.0	263.0	271.1	268.8	272.2	283.1	300.4	318.5
% change	16.3	3.2	1.6	0.5	-0.8	3.1	-0.8	1.3	4.0	6.1	6.0
Unemployment Transfers	75.4	65.9	51.5	38.3	24.8	23.1	21.7	22.0	20.4	21.7	22.0
% change	39.6	-12.6	-21.9	-25.6	-35.2	-6.9	-6.1	1.4	-7.3	6.4	1.4

## 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 temporary assistance for needy families and other payments.
5. Unemployment transfer payments include unemployment insurance payments to individuals.

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# Borderplex Long-Term Economic Trends to 2029

UTEP is pleased to announce the publication of the 2010 edition of its primary source of long-term border business outlook information. Topics covered include detailed economic projections for El Paso and Las Cruces, plus economic and demographic forecasts for Ciudad Juárez and Chihuahua City. Forecasts are generated utilizing the 215-equation UTEP Border Region Econometric Model developed under the auspices of a corporate research support program from El Paso Electric Company.

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.

The long-term border business outlook through 2029 can be purchased for \$10 per copy (only electronic copies are available). Each subscription entitles your organization to one free admission to the future UTEP Border Economic Forums. Please indicate to what address the report(s) should be mailed (also include telephone, fax, and email address):

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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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Contributors to the book include economic researchers from The University of Texas at El Paso, New Mexico State University, The University of Texas-Pan American, Texas A&M International University, El Colegio de la Frontera Norte, and the Federal Reserve Bank of Dallas. Their research interests cover a wide range of fields and provide multi-faceted angles from which to examine border economic trends and issues.

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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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