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Paso Del Norte Regional Economy Socioeconomic Profile



Prepared by

Institute for Manufacturing and Materials Management (IM³)
University of Texas at El Paso
901 Education Building
El Paso, Texas 79968
Donald A. Michie, Director

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Foreword

The Institute for Manufacturing and Materials Management at the University of Texas at El Paso is pleased to present the 1991 edition of the *Paso del Norte Socioeconomic Profile*. The purpose of this document is to promote a better understanding of the challenges and opportunities of the Paso del Norte region and to provide information that invites critical evaluation of the region in a clear and precise sense of where it stands in regard to growth. Due to the difficulties in data compilation and standardization, this report is intended solely to illustrate relative magnitudes and trends within the Paso del Norte region.

I would like to acknowledge the efforts of Linda Guthrie, Technical Writer II; Gerald Denny, Programmer Analyst II; Janet Shannon, Programmer Analyst II; and Ross Odom, student intern, in the preparation of this profile.



Donald A. Michie
Director



Erin Ross
Assistant Director
for Communications

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Executive Summary

The purpose of this report is to create a clear picture of the market known as the Paso del Norte. This area has enjoyed a rapid rate of industrial growth and is positioned to emerge as an economic powerhouse over the next few decades.

This report documents an area enjoying rapid industrial growth. Some things the statistics can't show including the uncrowded, room-to-grow nature of the region, which offers a wealth of opportunities for living and doing business; the lifestyle, enriched by a unique cultural mix of old world and new; the many recreational resources; the climate; commerce and the people.

The social and economic statistics point to the importance of a new perspective. At the center of the Paso del Norte is El Paso, a city of 591,610 (1990 U.S. Census) with an economy of \$8.6 billion. The city ranks within the top 80 Metropolitan Statistical Areas (MSA) in the United States.

The larger Paso del Norte is a trade area in which 1.69 million people support an economy of more than \$15.1 billion. Were the region itself a Metropolitan Statistical Area, it would rank among the top 20 MSAs in the United States.

In the global economy, the region serves largely as a center for materials management--that is the production, storage, and movement of basic materials and products. The area's industries include extraction (minerals and timber), metallurgy (metal matrix composites), high technology (White Sands Missile Range), manufacturing (maquiladoras), and logistics (warehousing and transportation). All rely upon the strategic management of materials. The ability of materials management to combine technology with a relatively inexpensive labor force lies at the heart of our region's competitive advantage in the global economy.

Maquiladoras, U.S.-owned companies operating in Mexico, play an increasingly important role in maintaining this competitive advantage. As production-sharing facilities, these companies incorporate in Mexico as Mexican companies, a move that allows them special privileges to import materials (in-bond) into Mexico for processing and export. By employing Mexican citizens, a less costly labor market, firms lower their cost of doing business and lower their product's prices. This business strategy has become a primary means for American firms to achieve price competitiveness in the world market.

The economic implications of the maquiladora industry have been--and will continue to be--far reaching. With American companies supplying most of the maquiladoras' goods and services, for instance, thousands of American jobs have been created. Studies estimate that more than 2 million American workers have jobs due, directly or indirectly, to the maquiladora industry. Mexico benefits not only from the 300,000 or so directly related jobs, but also from the infusion of capital and technology.

The Paso del Norte region stands to gain even more by serving as a world center for the maquiladora industry and its suppliers, but the region must wake

up to the obvious advantages of doing business with maquiladoras. Many fail to recognize the industry's ability to generate revenue. As an example, Mexican companies contribute less than 2 percent of maquiladora material supplies. A demand vacuum has been created, which the regional community has failed to fill. Although substantial growth has occurred in the area's basic material supply industries, demand by maquiladoras for such things as tool and die, metal stamping and plastic injection molding remains strong.

Indeed, after 24 years of unrelenting demand, maquiladoras must still seek most of their material and service needs in other locales. Such far-flung buying practices increase costs, a problem that could be alleviated by more proximal markets.

So, while maquiladoras are spurring growth in a number of industries throughout the United States, the number of regional companies taking full advantage of the prospects remains small.

The Paso del Norte

Introduction

Why the Paso del Norte?

The advantage of treating El Paso as part of a larger trade area is obvious. Economically, the region's gross regional product (GRP) totals approximately \$15.1 billion compared to El Paso's \$8.6 billion. The region's population totals 1.69 million. El Paso's population is 591,610. These statistics do not take into account the critical role the trade area has assumed in the industrial competitiveness of American industry. The Paso del Norte, in fact, has all the essential resources to compete in the global economy as a separate economic unit. The major challenge for the region is to realize its full socioeconomic potential.

Background

Paso del Norte - - The Pass of the North - - has existed as a commercial center and trade area for centuries. Its colorful past includes American Indians, Spanish conquistadors, missionaries and settlers. Its entrepreneurs have included bandits, renegades, gunslingers, pioneers and statesmen. The most notable among these have been Billy the Kid, Geronimo, Don Juan de Onate, Benito Juarez, Pancho Villa, Douglas MacArthur and Omar Bradley. Truly, the Paso del Norte holds a unique historical place in American and Mexican commerce.

The attractiveness of the Paso del Norte as a center for commerce can be attributed to its primary resources - - land and human. Geographically, the pass is located strategically for north-south and east-west trade routes. Interstate 10 links markets west and east; Interstate 25 and the Pan American Highway link markets north and south. Major rail and air transportation follow similar routes.

The trade area covers hundreds of thousands of square miles bordered by communities such as Albuquerque, New Mexico, to the North; Chihuahua City, Mexico to the South; Lordsburg, New Mexico, to the West; and Van Horn, Texas, to the East. Within this region there are unparalleled geographic contrasts - - high desert plateaus, snowcapped peaks, forested wilderness and wonderful, wide-open space. A few of the physical treasures include Carlsbad Caverns, White Sands National Monument, the Gila Wilderness, the Sierra Madre, Elephant Butte Reservoir and the Rio Grande. The land reflects economic development by hard-working, industrious people, as witnessed by the Indian dwellings and pueblos, ghost towns, abandoned and active mines, ranches and haciendas, and by rapidly growing communities. Current evidence of development is the GRP of \$15.1 billion; an economy that is stable, yet diverse; and an economic base grounded in manufacturing, retail, services, government and agriculture. Today, the region presents stark contrasts in economic development potential. The contrast is the high technology found at White Sands versus the labor-intensive characteristics of the region's manufacturing industry.

Finally, the Paso del Norte's proximity to major U.S. markets has been a

stimulus for economic development. Within a single day, a company can deliver products to more than 20 million Americans located in markets such as Los Angeles, Phoenix, Denver, Dallas-Fort Worth, Houston and San Antonio. Within a single day, businesses can serve eight of the top 25 U.S. markets.

Economic Characteristics

The major sectors of the Paso del Norte include wholesale and retail trade (56.1 percent), manufacturing (18.6 percent), transportation (5.9 percent), services (11.2 percent), construction (5.6 percent) and other sectors (2.6 percent). This growth can be attributed to the rapid expansion of the maquiladora industry located in Mexico and to the expanding U.S. economy. El Paso dominates the GRP figures, capturing 57.9 percent of the total, or \$8.7 billion. Ciudad Juarez (hereinafter referred to as Juarez) contributes 14.8 percent to the GRP, Dona Ana County contributes 12.3 percent, other Southern New Mexico counties are responsible for 13.9 percent and other West Texas counties contribute 1 percent. The age distribution for each community remains virtually unchanged from GRP figures recorded for 1978.

Although GRP grew significantly during 1978-1990, regional employment did not increase proportionately. Employment has increased by only 5.8 percent annually, and the age-share of employment did not change for the communities. El Paso provided employment for approximately 38.2 percent of the regional workforce, Juarez (40.1 percent), Dona Ana County (10.7 percent), other Southern New Mexico counties (9.7 percent) and West Texas (1.5 percent). The largest segment of the population (48 percent) is 24 or younger.

Other statistics point to a robust economy for the region. During 1990, border crossings (vehicles and people) totaled 15.8 million. In 1989 bank deposits were \$6.3 billion, an increase of 23.5 percent from 1988. Vehicle registrations totaled 941,788. Finally, the gross value of agricultural production expanded by 5.6 percent annually, a figure that was dominated by Dona Ana County's 23 percent.

Taken together, these data illustrate why the Paso del Norte had one of the fastest growing regional economies along the U.S.-Mexico border. Also, these statistics explain why the U.S.-Mexico border has become the front door, not back door, to U.S.-Mexico and global commerce.

As an international trade center, the Paso del Norte's three principal communities have the resources and linkages to be a competitive force in global economic development. The communities - - which include El Paso - - Juarez and Las Cruces - - are inextricably linked, though divided by state and international political boundaries. A review of this socioeconomic mosaic will explain why the communities are interdependent yet distinct.

El Paso

The hub of the Paso del Norte is El Paso. The city's economy alone accounts for 57.9 percent of the trade area's output in dollars, and it is the area's service center. Excellent transportation linkages to other U.S. markets contribute to El Paso's status as one of the world's busiest ports of entry, funneling commerce and people to and from the United States and Mexico.

El Paso's economy is based primarily on retailing, manufacturing, government and service industries. This blend of activity accounts for the community's growth and stability. Retail sales exceed \$3.7 billion, of which a significant proportion, up to 40 percent, can be attributed to Mexican shoppers. The goods and services that account for these major retail sales include automobiles, appliances, furniture and restaurant services. Manufacturing exceeds \$1.3 billion; major industries include apparel, food processing, construction materials and light manufacturing. Major services include finance, communications, law, medicine and transportation. Fort Bliss, White Sands Missile Range and Holloman Air Force Base contribute more than \$1.3 billion.

El Paso's population is young and bicultural. The median age is 25 years, and the residents have access to the El Paso Community College and the University of Texas at El Paso. The population is 69.6 percent Hispanic and bilingualism is common.

Juarez

If El Paso is the hub of the Paso del Norte trade area, Juarez is the axle. Because of the rapid growth of Mexico's maquila industry and the city's access to the U.S. and Mexican markets, Juarez has become the dominant commercial center along Mexico's border with the United States. Its rail, highway and air services to Mexico's interior and its access to services located in El Paso and Juarez make the city a major center for international commerce.

The \$1.1 billion economy of Juarez is generated by retailing, manufacturing and services. There are over 8,000 retail establishments in the city. The major shopping areas are the ProNaf Center, the Rio Grande Mall and Juarez Avenue. Restaurants, grocery stores, hotels and clothing stores dominate retail sales, which suggests El Paso and other communities are significant contributors to retail trade.

The manufacturing sector is dominated by the maquiladora industry. Juarez has captured more than 15 percent of Mexico's maquila industry due to the recent devaluation of the peso, the lack of competitiveness of U.S. industry in world markets, an abundant supply of labor, and its location relative to U.S. markets and production facilities. Approximately 250 firms, including General Electric, RCA, A.O. Smith, General Motors, Ford and other Fortune 500 companies have established production facilities in Juarez employing approximately 141,156 workers.

As in El Paso, the approximately 797,697 residents of Juarez are young, bicultural and well educated. The median age is less than 24. Bilingualism is

common because English is taught in the primary and secondary school systems. Further, Juarez citizens have access to the Autonomous University of Juarez and Monterrey Tech. The excellent training provided by these schools has created a labor force capable of high-technology production and assembly.

Las Cruces

Las Cruces is a city situated in the Rio Grande Valley adjacent to the magnificent Organ Mountains. In 1990 its population was 135,510. Its airport and highways link the community to major Southwestern markets, including Albuquerque and Tucson. Its proximity to White Sands Missile Range and to the Lyndon Johnson Missile Testing Center has brought NASA and numerous defense contractors to the community. Through Las Cruces, one gains access to the "Land of Enchantment" that is New Mexico. An hour's drive opens the door to hiking, hunting, fishing, skiing and camping.

The \$1.6 billion economy of this area is based on retailing and services. Retail sales are generated by the Mesilla Valley Mall and many smaller neighborhood centers. Nearby, the village of Old Mesilla attracts tourists to its galleries, restaurants and boutiques. Manufacturing is primarily light industry, such as L'Eggs Hosiery and Microswitch. In agriculture, the community is renowned for its chili, cotton, lettuce, pecan and dairy production.

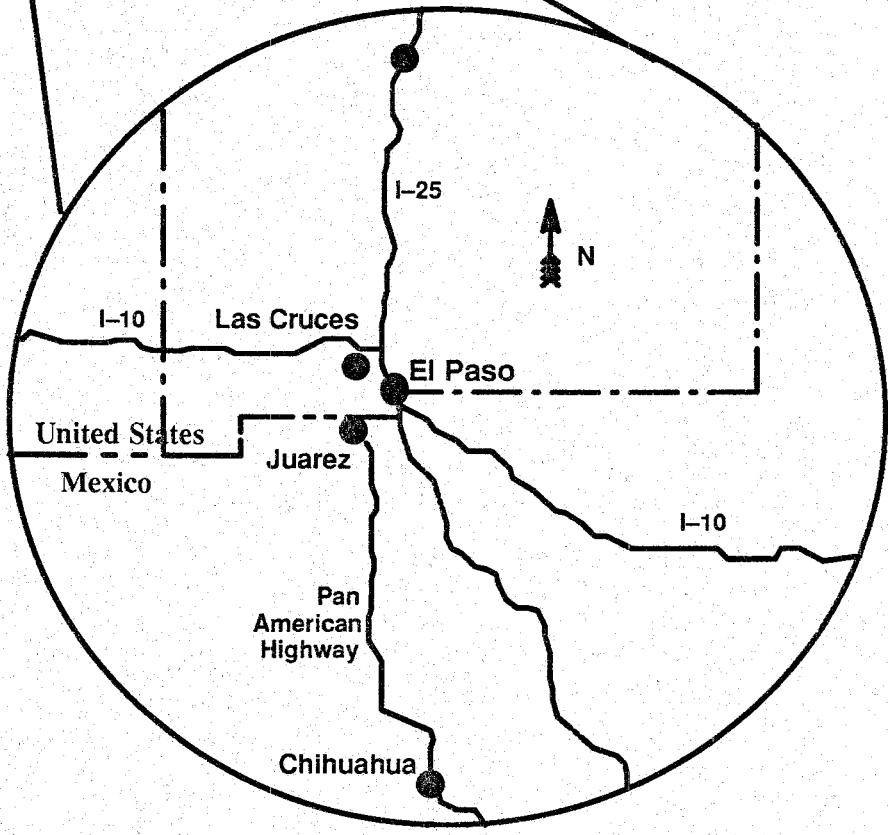
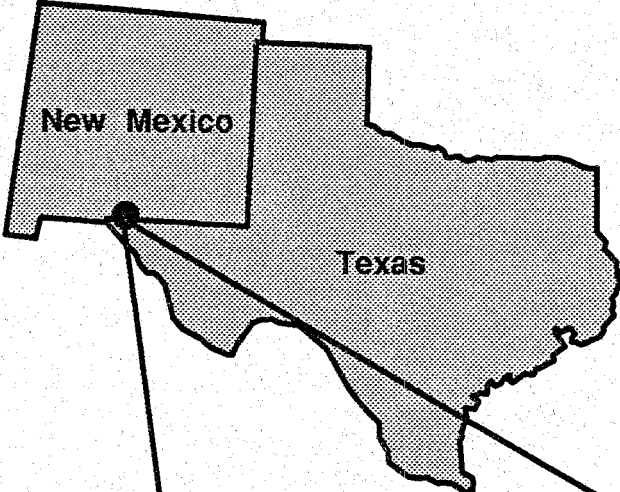
The Las Cruces labor force is well educated and young, with a median age of 26. Its residents have access to university and technical education at New Mexico State University and Dona Ana Community College.

The Impact of the Maquila Industry

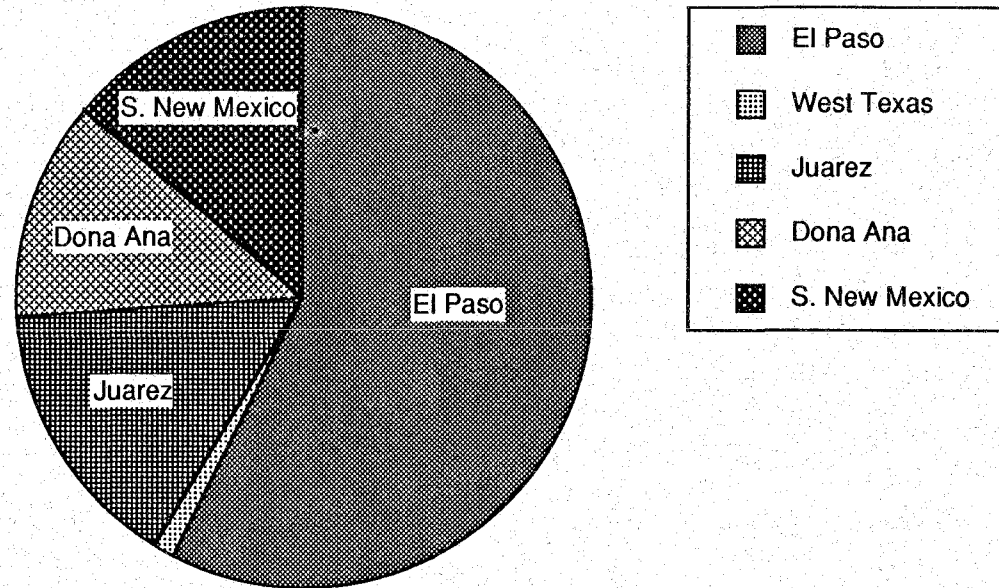
Although the Paso del Norte has an established and stable economic base, it is the maquila industry that has been the dramatic stimulus for economic growth in recent years. The plants have brought production and materials management expertise, high technology and skilled jobs. Transportation, finance, communications, customs brokerages, warehouses and industrial parks are among the support services that have grown with the maquilas. Recent maquila data suggest that for every four plants built in Mexico, a direct support facility is established on the U.S. side of the border. These facilities provide jobs for industrial workers and for service support technicians and staff.

In addition, approximately 1,600 maquila managers and workers have established their residences in El Paso, a situation that has bolstered the residential housing market. The industry also supports an additional 45,627 jobs in associated business for El Paso. Finally, the industry has brought the Paso del Norte into the modern global economy. Maquila products are shipped not only to the United States, but to Europe, Japan and other markets.

Paso del Norte Trade Area



Gross Regional Product (000s) Paso del Norte 1990

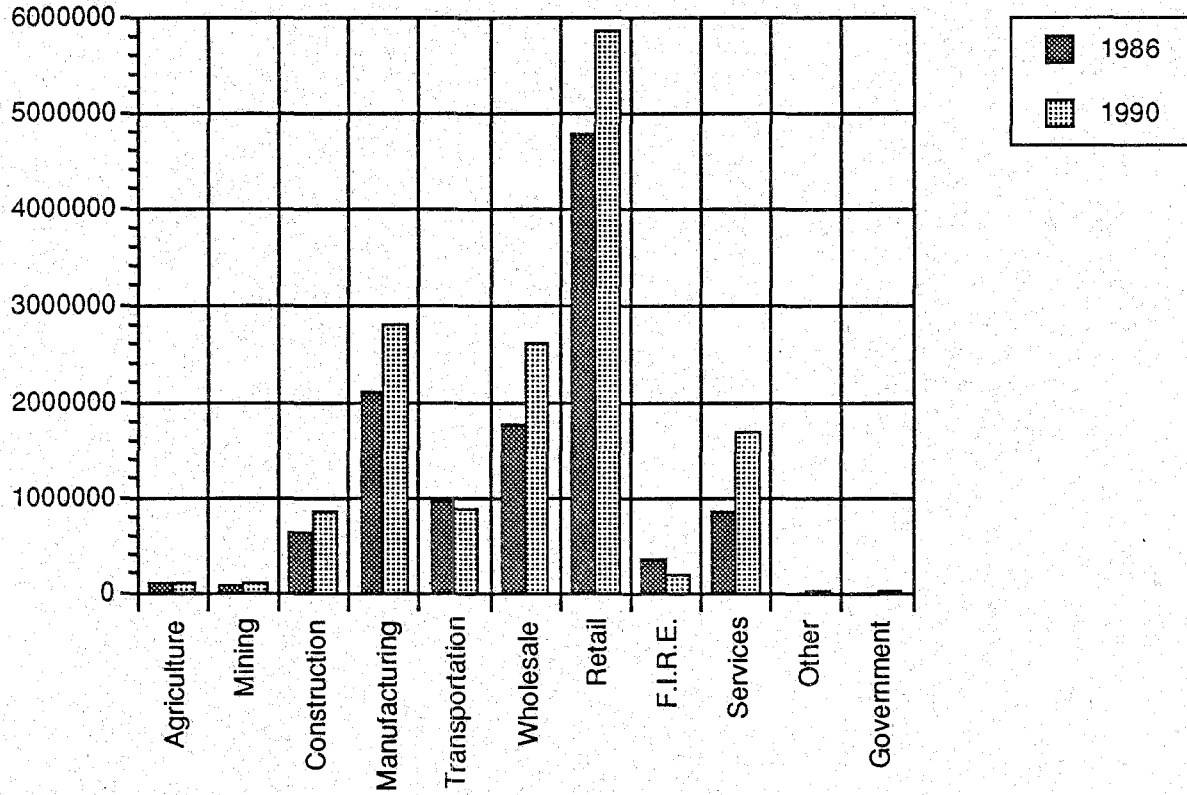


Industry	El Paso	% of Total	West Texas	% of Total	Juarez	% of Total	Dona Ana	% of Total	S. New Mexico	% of Total	Paso del Norte	% of Total
Agriculture	11,851	.1	1,026	.6	45,470	4.8	22,449	1.2	6,561	.3	87,357	.6
Mining									90,839	4.3	90,839	.6
Construction	289,975	3.3	2,506	1.6	49,610	4.6	196,102	10.5	299,532	14.3	837,725	5.6
Manufacturing	1,323,999	15.2	10,296	6.6	1,194,160	62.8	125,578	6.8	152,788	7.3	2,806,821	18.6
Transportation	409,639	4.7	7,921	5.0	13,680	1.2	180,052	9.7	279,667	13.3	890,959	5.9
Wholesale	2,282,815	26.1	12,644	8.1			167,427	9.0	135,429	6.4	2,598,315	17.2
Retail	3,732,468	42.7	111,162	70.8	726,480	32.5	577,996	31.1	716,195	34.1	5,864,426	38.9
F.I.R.E.	11,068	.1	192	.1	86,500	3.9	29,994	1.6	42,581	2.0	170,316	1.1
Services	668,280	7.7	7,166	4.6	116,760	5.2	543,947	29.9	353,468	16.8	1,689,621	11.2
Public Admin.												
Other	935	.0	4,015	2.6			4,130	.2	18,398	.9	27,478	.2
Government							12,172	.1	6,453	.3	18,625	.1
Total	8,731,031	100.0	156,928	100.0	2,232,710	100.0	1,859,847	100.0	2,101,911	100.0	15,082,427	100.0

Note: West Texas includes Brewster, Culberson, El Paso, Hudspeth, Jeff Davis and Presidio counties; Southern New Mexico includes Dona Ana, Eddy, Lincoln, Luna, Otero, and Sierra Counties; Paso del Norte includes West Texas, Southern New Mexico and Juarez; Mexico reports wholesale and retail as commerce.

Source: Texas Comptroller of Public Accounts; Desarrollo Economico del Estado de Chihuahua, A.C.; Taxation and Revenue Department, New Mexico; Bureau of Business and Economic Research, University of New Mexico

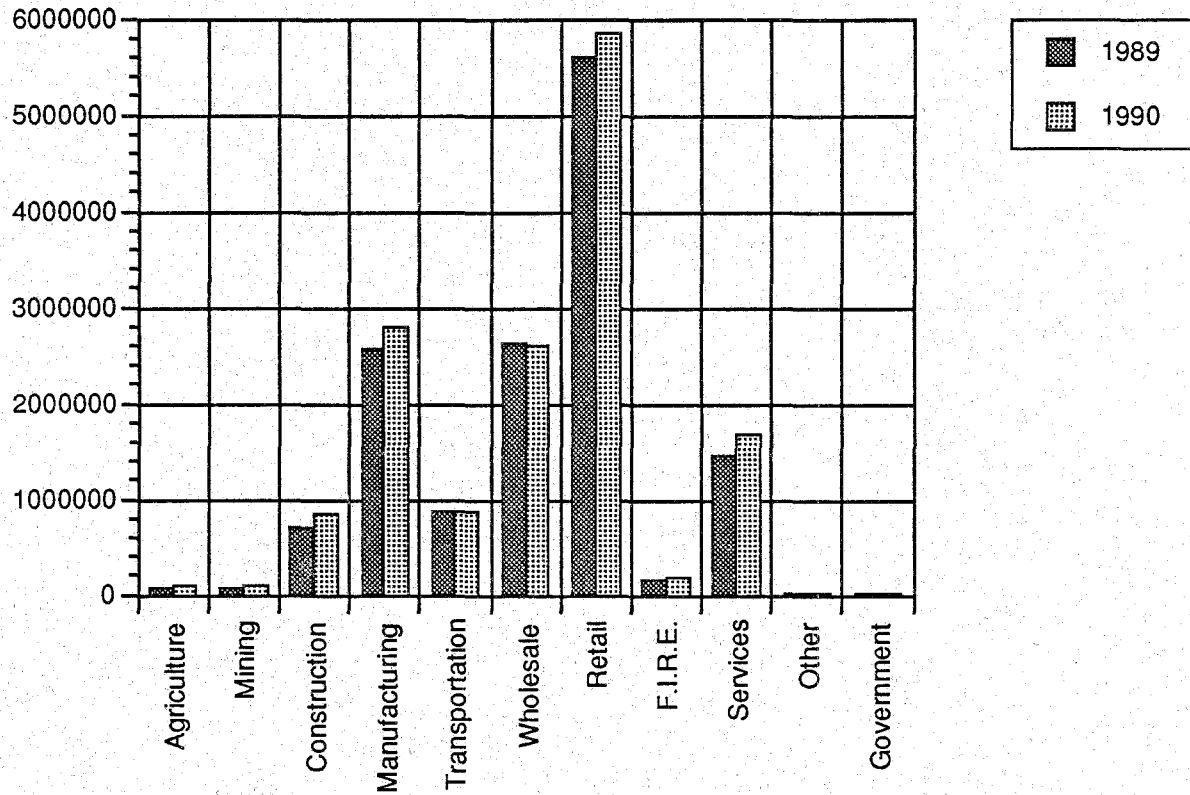
Gross Regional Product Paso del Norte 1986-1990



Industry	1986		1990		Growth (%)
	Dollars (000s)	Percent of Total	Dollars (000s)	Percent of Total	
Agriculture	87,882	.8	87,357	.6	-6
Mining	64,020	.6	90,839	.6	41.9
Construction	630,855	5.4	837,725	5.6	32.8
Manufacturing	2,091,300	18.0	2,806,821	18.6	34.2
Transportation	970,437	8.4	890,959	5.9	-8.2
Wholesale	1,763,935	15.2	2,598,315	17.2	47.3
Retail	4,779,433	41.2	5,864,301	38.9	22.7
F.I.R.E.	339,457	2.9	170,385	1.1	-49.8
Services	864,301	7.5	1,689,621	11.2	95.5
Public Admin.					
Other			27,478	.2	
Government			18,625	.1	
Total	11,591,619	100.0	15,082,427	100.0	30.1

Source: Comptroller of Public Accounts, Texas; Secretariat of Programming & Budget, Mexico; Taxation and Revenue Department, New Mexico; Bureau of Business and Economic Research, University of New Mexico

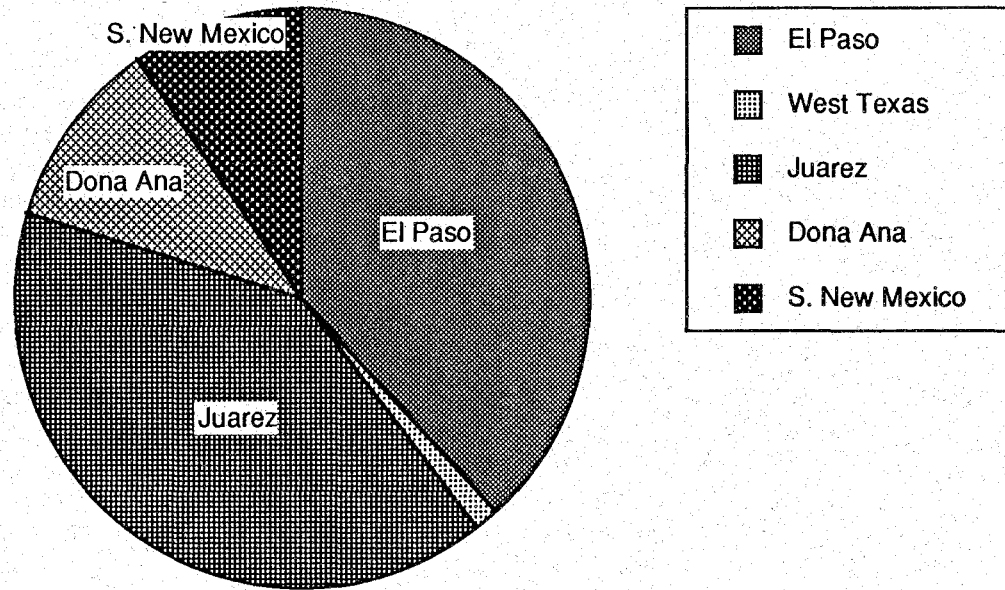
Gross Regional Product Paso del Norte 1989-1990



Industry	1989		1990		Growth (%)
	Dollars (000s)	Percent of Total	Dollars (000s)	Percent of Total	
Agriculture	84,019	.6	87,357	.6	4.0
Mining	70,748	.5	90,839	.6	28.4
Construction	706,336	5.0	837,725	5.6	18.6
Manufacturing	2,564,326	18.1	2,806,821	18.6	9.5
Transportation	871,724	6.2	890,959	5.9	2.2
Wholesale	2,640,585	18.6	2,598,315	17.2	-1.6
Retail	5,558,728	39.4	5,864,301	38.9	4.9
F.I.R.E.	160,829	1.1	170,385	1.1	5.9
Services	1,452,596	10.3	1,689,621	11.2	16.3
Public Admin.					
Other	24,890	.2	27,478	.2	10.4
Government	5,772	.0	18,625	.1	222.7
Total	14,170,553	100.0	15,082,427	100.0	6.4

Source: Comptroller of Public Accounts, Texas; Secretariat of Programming & Budget, Mexico; Taxation and Revenue Department, New Mexico; Bureau of Business and Economic Research, University of New Mexico

Employment by Industry Paso del Norte 1990

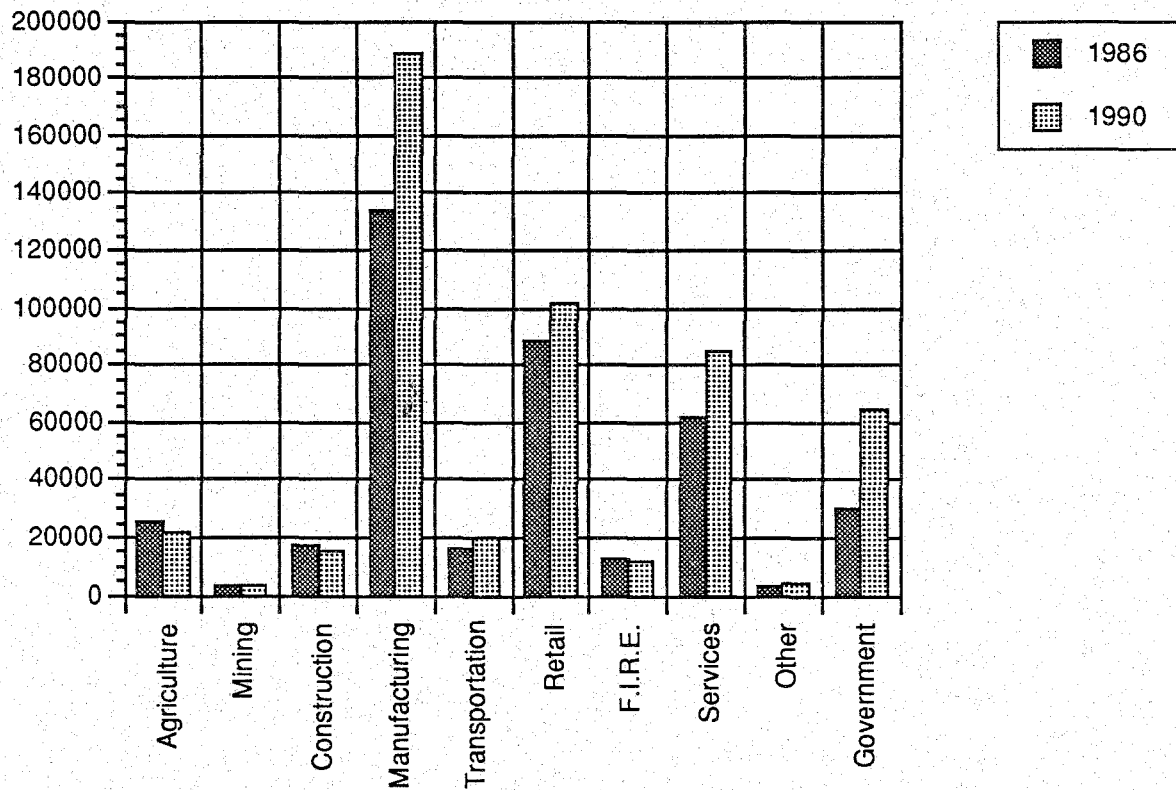


Industry	El Paso	% of Total	West Texas	% of Total	Juarez	% of Total	Dona Ana	% of Total	S. New Mexico	% of Total	Paso del Norte	% of Total
Agriculture	1,941	1.0	789	11.4	368	.2	11,207	20.3	7,217	14.5	21,512	4.2
Mining	41	.0	9	.1	94	.0	3,213	6.4	3,213	6.4	3,357	.7
Construction	8,330	4.2	251	3.6	3,283	1.6	2,200	4.0	1,722	3.5	15,786	3.1
Manufacturing	41,369	21.0	48	.7	141,156	58.2	3,600	6.5	2,372	4.8	188,432	36.6
Transportation	9,776	5.0	304	4.4	5,424	2.4	1,600	2.9	2,501	5.0	19,605	3.8
Wholesale	52,442	42.7	1,427	20.5	28,506	12.5	9,200	16.7	9,991	20.0	101,566	19.7
Retail	7,868	4.0	177	2.5	1,600	2.9	1,617	3.2	1,617	3.2	11,262	2.2
F.I.R.E.	41,053	20.9	1,802	25.9	23,180	21.7	7,800	14.1	10,646	21.3	84,481	16.4
Services												
Public Admin.												
Other											4,626	.9
Government	33,821	17.2	2,142	30.8	4,626	1.8	18,000	32.6	10,618	21.3	64,581	12.5
Total	196,641	100.0	6,949	100.0	206,514	100.0	55,207	100.0	49,897	100.0	515,208	100.0

Note: West Texas includes Brewster, Culberson, El Paso, Hudspeth, Jeff Davis and Presidio counties; Southern New Mexico includes Dona Ana, Eddy, Lincoln, Luna, Otero, and Sierra Counties; Paso del Norte includes West Texas, Southern New Mexico and Juarez; Mexico reports wholesale and retail as commerce.

Source: Texas Employment Commission; Desarrollo Económico del Estado de Chihuahua, A.C.; New Mexico Department of Labor, Research and Analysis Division; New Mexico Employment Security Department, Bureau of Economic Analysis, *Migrant and Seasonal Farmworkers in New Mexico Report*, New Mexico Health and Environmental Department

Employment by Industry Paso del Norte 1986-1990



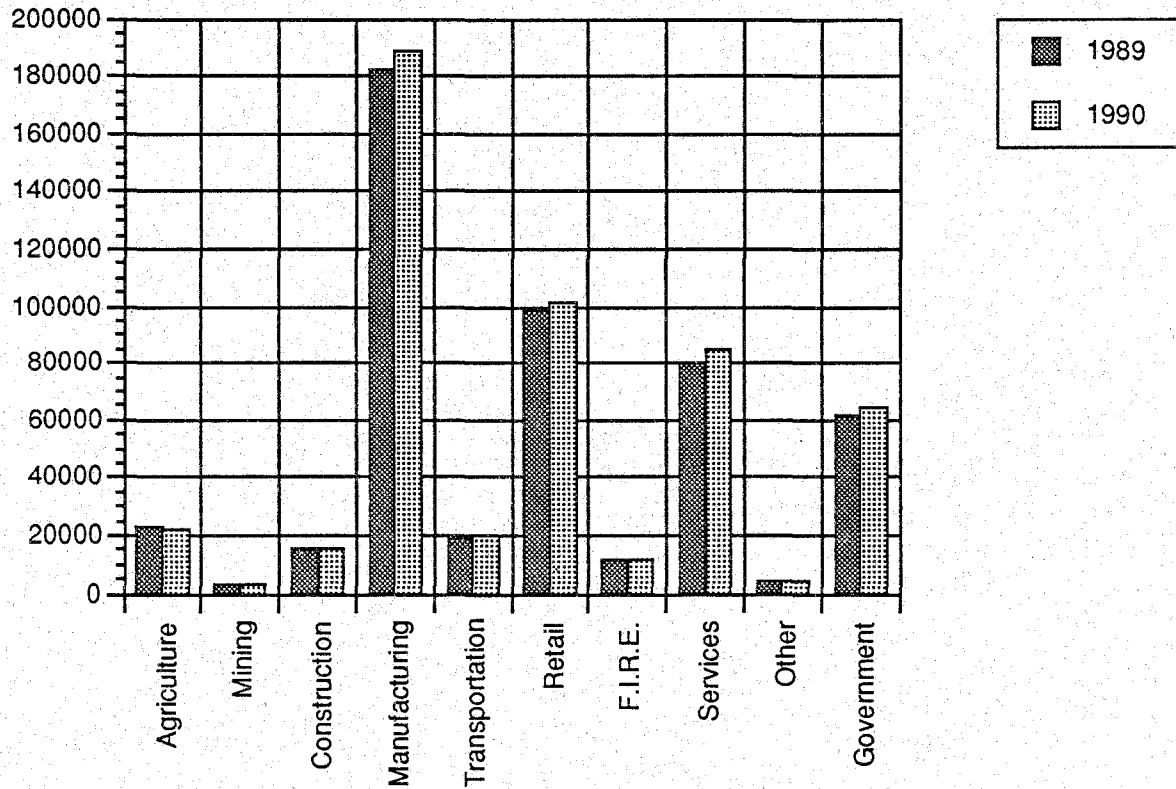
Industry	1986		1990		Growth (%)
	Employment	Percent of Total	Employment	Percent of Total	
Agriculture	25,904	6.6	21,512	4.2	-17.0
Mining	2,991	.8	3,357	.7	12.2
Construction	17,289	4.4	15,786	3.1	-8.7
Manufacturing	133,858	34.0	188,432	36.6	40.8
Transportation	16,556	4.2	19,605	3.8	18.4
Wholesale					
Retail	88,229	22.4	101,566	19.7	15.1
F.I.R.E.	12,756	3.2	11,262	2.2	-11.7
Services	62,120	15.8	84,481	16.4	36.0
Public Admin.					
Other	3,342	.8	4,626	.9	38.4
Government	30,513	7.8	64,581	12.5	111.6
Total	393,558	100.0	515,208	100.0	30.9

Note 1: Resale and wholesale data are combined.

Note 2: Blanks represent unavailable data.

Source: Texas Employment Commission, Economic Development of Chihuahua, New Mexico Department of Labor, Research and Analysis Division; New Mexico Employment Security Department, Bureau of Economic Analysis, *Migrant and Seasonal Farmworkers in New Mexico Report*, New Mexico Health and Environmental Department

Employment by Industry Paso del Norte 1989-1990



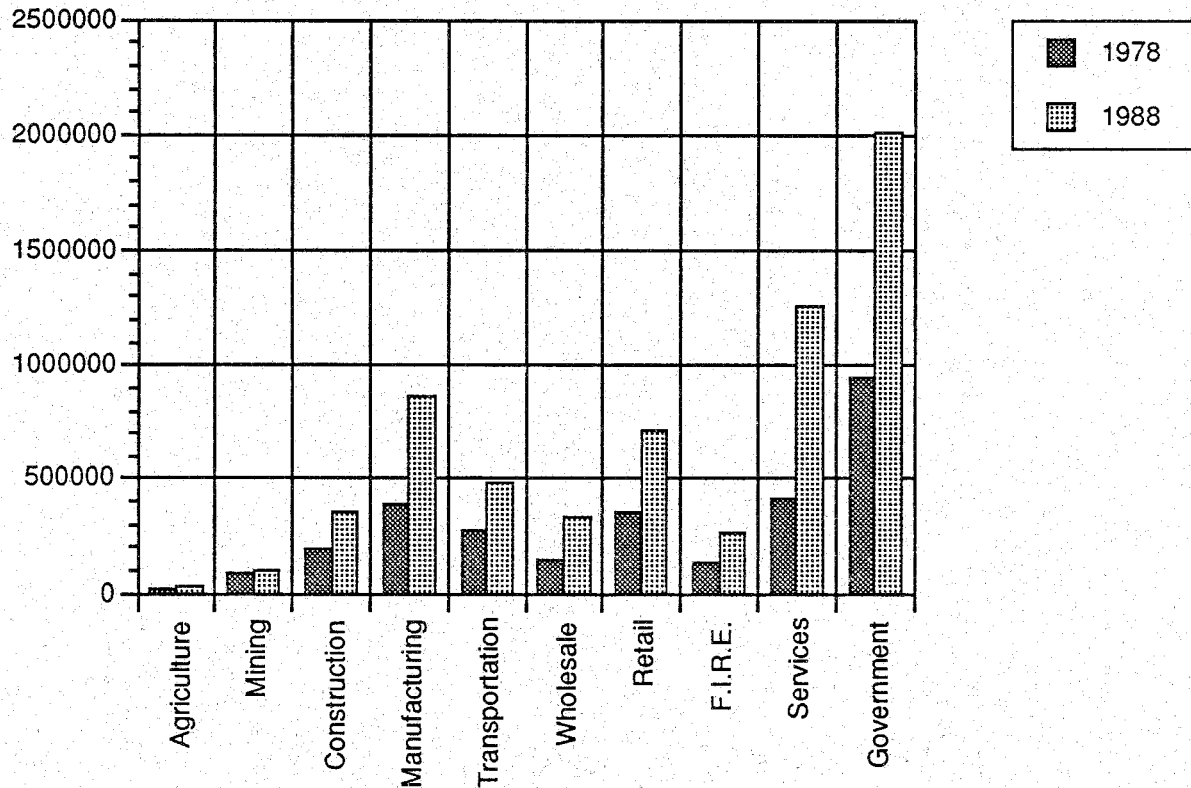
Industry	1989		1990		Growth (%)
	Employment	Percent of Total	Employment	Percent of Total	
Agriculture	22,833	4.6	21,512	4.2	-5.8
Mining	3,148	.6	3,357	.7	6.6
Construction	15,386	3.1	15,786	3.1	2.6
Manufacturing	181,965	36.4	188,432	36.6	3.6
Transportation	19,192	3.8	19,605	3.8	2.2
Wholesale					
Retail	98,641	19.7	101,566	19.7	3.0
F.I.R.E.	11,490	2.3	11,262	2.2	-2.0
Services	80,558	16.1	84,481	16.4	4.9
Public Admin.					
Other	4,410	.9	4,626	.9	4.9
Government	62,059	12.4	64,581	12.5	4.1
Total	499,682	100.0	515,208	100.0	3.1

Note 1: Resale and wholesale data are combined.

Note 2: Blanks represent unavailable data.

Source: Texas Employment Commission, Economic Development of Chihuahua, New Mexico Department of Labor, Research and Analysis Division; New Mexico Employment Security Department, Bureau of Economic Analysis, *Migrant and Seasonal Farmworkers in New Mexico Report*, New Mexico Health and Environmental Department

Total Salaries by Industry Paso del Norte 1978-1988

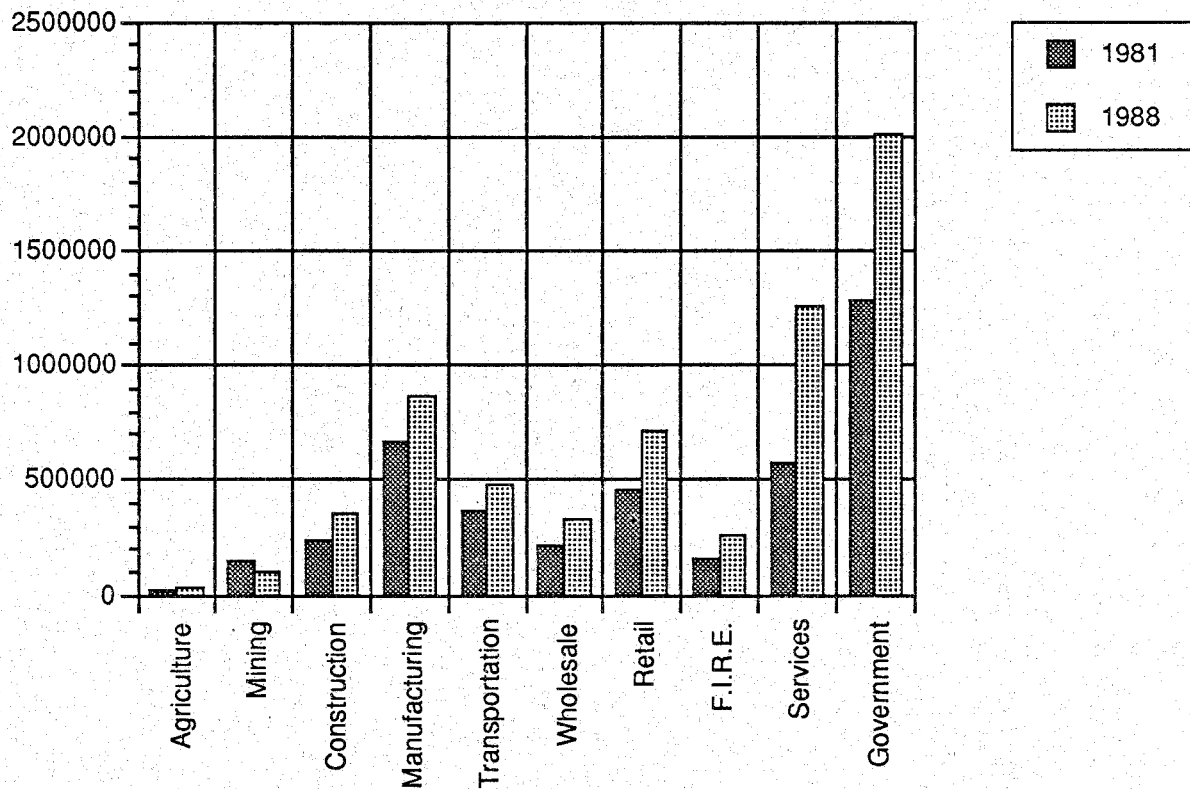


Industry	1978		1988		Growth (%)
	Dollars (000s)	Percent of Total	Dollars (000s)	Percent of Total	
Agriculture	14,282	.5	35,741	.6	150.3
Mining	83,260	2.8	103,858	1.6	24.7
Construction	195,718	6.6	360,001	5.6	83.9
Manufacturing	391,858	13.2	866,397	13.4	121.1
Transportation	274,162	9.2	484,322	7.5	76.7
Wholesale	147,867	5.0	331,975	5.1	124.5
Retail	358,428	12.0	716,660	11.1	99.9
F.I.R.E.	133,696	12.0	261,413	4.1	95.5
Services	416,733	14.0	1,257,380	19.5	201.7
Government	950,133	31.9	2,006,195	31.1	111.1
Total	\$2,977,674	100.0	\$6,446,696	100.0	

Note: Does not include Juarez.

Source: U.S. Department of Commerce, Bureau of Economic Analysis

Total Salaries by Industry Paso del Norte 1981-1988

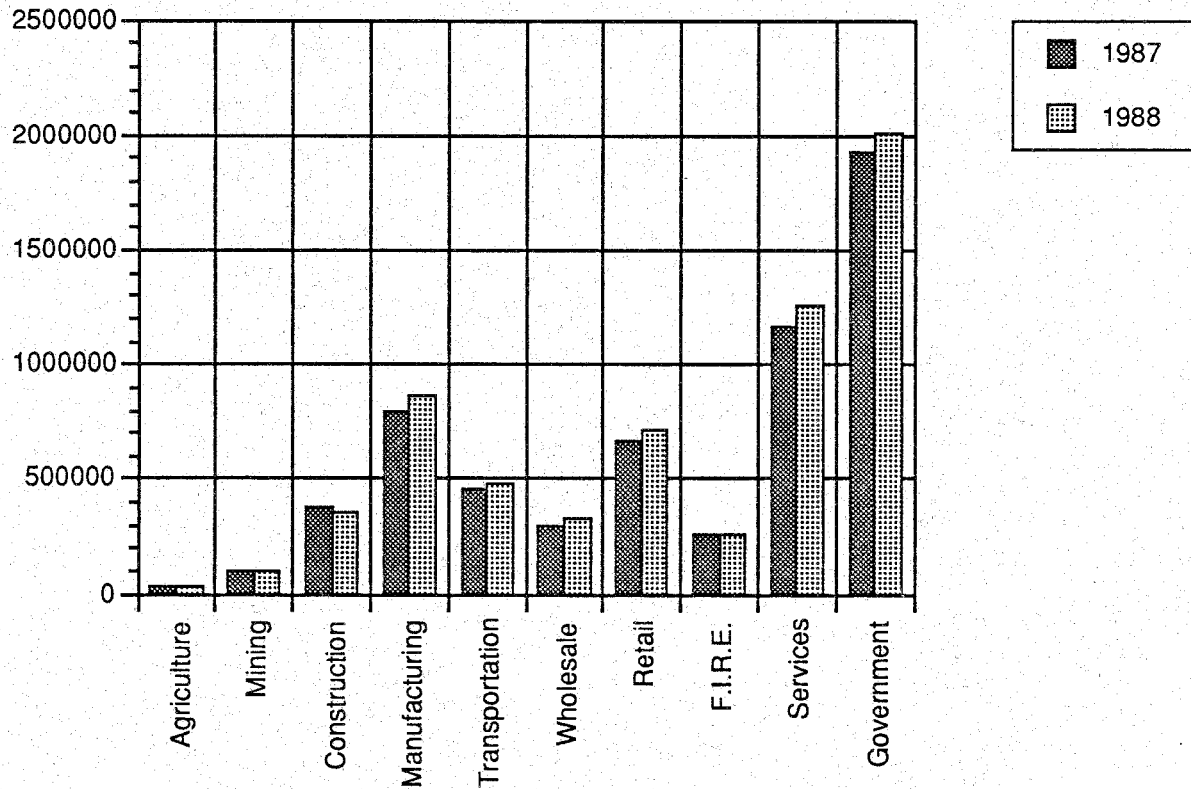


Industry	1981		1988		Growth (%)
	Dollars (000s)	Percent of Total	Dollars (000s)	Percent of Total	
Agriculture	15,972	.4	35,741	.6	123.8
Mining	143,956	3.5	103,858	1.6	-27.9
Construction	234,968	5.7	360,001	5.6	53.2
Manufacturing	666,239	16.1	866,397	13.4	30.0
Transportation	371,343	9.0	484,322	7.5	30.4
Wholesale	216,423	5.2	331,975	5.1	53.4
Retail	461,961	11.1	716,660	11.1	55.1
F.I.R.E.	156,626	11.1	261,413	4.1	66.9
Services	576,958	13.9	1,257,380	19.5	117.9
Public Admin. Other					
Government	1,277,109	30.8	2,006,195	31.1	57.1
Total	4,147,443	100.0	6,446,696	100.0	55.4

Note: Does not include Juarez.

Source: U.S. Department of Commerce, Bureau of Economic Analysis

Total Salaries by Industry Paso del Norte 1987-1988



Industry	1987		1988		Growth (%)
	Dollars (000s)	Percent of Total	Dollars (000s)	Percent of Total	
Agriculture	31,634	.5	35,741	.6	13.0
Mining	96,495	1.6	103,858	1.6	7.6
Construction	379,744	6.2	360,001	5.6	-5.2
Manufacturing	796,712	13.1	866,397	13.4	8.7
Transportation	460,597	7.6	484,322	7.5	5.2
Wholesale	300,054	4.9	331,975	5.1	10.6
Retail	664,202	10.9	716,660	11.1	7.9
F.I.R.E.	264,920	10.9	261,413	4.1	-1.3
Services	1,163,385	19.1	1,257,380	19.5	8.1
Public Admin. Other					
Government	1,924,497	31.6	2,006,195	31.1	4.2
Total	6,093,487	100.0	6,446,696	100.0	5.8

Note: Does not include Juarez.

Source: U.S. Department of Commerce, Bureau of Economic Analysis

**PASO DEL NORTE
POPULATION DISTRIBUTION - 1990**

YEARS	WHITE		BLACK		INDIAN		ASIAN		OTHER		TOTAL		HISPANIC	
	MALE	FEMALE	MALE	FEMALE	MALE	FEMALE	MALE	FEMALE	MALE	FEMALE	MALE	FEMALE	MALE	FEMALE
Under 1	5,587	5,221	272	265	70	79	54	43	1,224	1,175	7,207	6,783	5,069	4,762
1 and 2	12,794	11,931	666	645	151	156	129	135	2,860	2,784	16,600	15,651	11,580	10,919
3 and 4	12,392	11,738	608	584	173	156	133	131	2,905	2,779	16,211	15,388	11,340	10,816
5	6,446	6,166	321	269	77	77	65	56	1,403	1,360	8,312	7,928	5,852	5,629
6	6,320	6,095	267	288	104	80	76	52	1,465	1,261	8,232	7,776	5,715	5,388
7 to 9	18,829	18,195	850	795	197	234	203	200	4,190	4,013	24,269	23,437	16,981	16,559
10 and 11	12,350	11,814	526	475	145	149	136	154	2,628	2,630	15,785	15,222	11,129	10,828
12 and 13	12,119	11,801	386	406	125	153	129	147	2,565	2,486	15,324	14,993	10,911	10,725
14	6,106	5,746	204	203	81	54	59	85	1,347	1,355	7,797	7,443	5,694	5,397
15	6,248	6,025	220	182	61	60	58	81	1,446	1,421	8,033	7,769	5,900	5,649
16	6,235	5,891	202	178	64	69	57	76	1,428	1,427	7,986	7,641	5,880	5,665
17	6,228	6,134	214	192	57	54	61	89	1,416	1,481	7,976	7,950	5,846	5,885
18	6,302	6,231	312	190	71	70	60	65	1,366	1,506	8,111	8,062	5,585	5,815
19	6,654	6,326	430	249	96	79	96	57	1,430	1,463	8,706	8,174	5,439	5,571
20	6,502	5,979	480	264	100	79	67	60	1,292	1,503	8,441	7,885	5,043	5,340
21	6,038	5,634	455	261	75	80	80	65	1,162	1,387	7,810	7,427	4,577	5,046
22 to 24	16,716	15,680	1,265	800	230	202	290	254	3,500	3,891	22,001	20,827	13,029	13,866
25 to 29	28,776	29,172	1,943	1,354	348	325	415	467	6,010	6,930	37,492	38,248	22,258	24,714
30 to 34	27,738	29,423	1,731	1,206	301	326	388	582	5,475	6,262	35,633	37,799	21,072	24,092
35 to 39	25,083	26,834	1,293	833	258	242	325	628	4,549	5,194	31,508	33,731	18,104	20,898
40 to 44	22,117	22,889	867	594	199	190	264	547	3,401	4,137	26,848	28,357	14,309	16,804
45 to 49	16,961	18,269	560	426	145	159	166	329	2,393	2,926	20,225	22,109	10,577	12,747
50 to 54	14,588	16,198	477	388	130	123	117	256	1,801	2,526	17,113	19,491	8,758	11,280
55 to 59	14,248	15,593	482	370	105	116	87	268	1,680	2,221	16,602	18,568	8,180	10,241
60 and 61	5,758	6,391	152	134	35	40	27	107	637	916	6,609	7,588	3,176	4,145
62 to 64	8,094	9,550	179	181	48	53	46	133	893	1,158	9,260	11,075	4,502	5,796
65 to 69	12,465	14,336	241	239	82	74	43	118	1,166	1,409	13,997	16,176	6,294	7,348
70 to 74	9,077	10,371	138	164	56	42	41	54	644	895	9,956	11,526	3,684	4,761
75 to 79	5,985	8,349	96	129	23	32	23	27	453	622	6,580	9,159	2,464	3,722
80 to 84	3,362	5,391	45	76	12	23	17	17	242	430	3,678	5,937	1,489	2,432
85 and over	1,977	4,454	46	67	11	15	3	12	179	294	2,216	4,842	1,036	1,956

	350,095	363,827	15,928	12,407	3,630	3,591	3,715	5,295	63,150	69,842	436,518	454,962	261,473	284,796

U.S. BUREAU OF THE CENSUS, 1990
DATA DOES NOT INCLUDE DATA FROM JUAREZ, CHIHUAHUA

Paso del Norte Trade Area Population Growth Rates

Community	1970	1980	Number	Percent	1990	Number	Percent	2000	Number	Percent
El Paso	359,291	479,899	120,608	33.6	591,610	111,711	23.3	760,000	168,390	28.5
Ciudad Juarez	425,000	663,000	238,000	56.0	797,697	134,697	20.3	1,684,472	886,775	111.2
El Paso\Cd. Juarez	784,291	1,142,899	358,608	45.7	1,389,307	246,408	21.6	2,444,472	1,055,165	76.0
Las Cruces	69,773	96,340	26,567	38.1	135,510	39,170	40.7	180,800	45,290	33.4

• High end projection

Source: U.S. Department of Commerce; Bureau of the Census; Department of Planning, City of El Paso; Ciudad Juarez en Cifras - 1988 Estadísticas Socioeconomicas Basicas; Tucson Economic Consul

Paso del Norte Trade Area Socioeconomic Statistics

	Totals	Percent of Totals
Population (1990)		
El Paso (MSA)	591,610	35.0
West Texas	23,586	1.4
Ciudad Juarez	797,679	47.2
Las Cruces (MSA)	135,510	8.0
Southern New Mexico	140,774	8.4
Total	1,689,159	

Per Capita Income (1990)	
El Paso (MSA)	\$10,778
Ciudad Juarez	
Las Cruces (MSA)	\$10,927

	Totals	Percent of Totals
Civilian Labor Force (1990)		
El Paso (MSA)	250,793	40.6
West Texas	9,210	1.5
Ciudad Juarez	243,201	39.4
Las Cruces (MSA)	59,168	9.6
Southern New Mexico	49,897	8.1
Total	616,983	

	Totals	Percent of Totals
Bank Deposits		
El Paso	2,970,875,300	58.4
West Texas	126,673,750	2.5
Juarez	429,720,830	8.5
Las Cruces	621,156,500	12.2
Southern New Mexico	935,787,750	18.4
Total	5,084,214,130	

	Totals	Percent of Totals
Bank Loans		
El Paso	1,741,189,500	64.0
West Texas	48,356,500	1.8
Juarez	N/A	
Las Cruces	422,151,000	15.5
Southern New Mexico	508,071,750	18.7
Total	2,719,768,750	

Source: Texas Employment Commission, Texas Comptroller of Public Accounts, Federal Reserve, Texas Department of Highways and Public Transportation, New Mexico Department of Labor, New Mexico Department of Taxation and Revenue, New Mexico Highway Department
 Note: Bank deposits do not include Savings and Loans or Credit Unions.

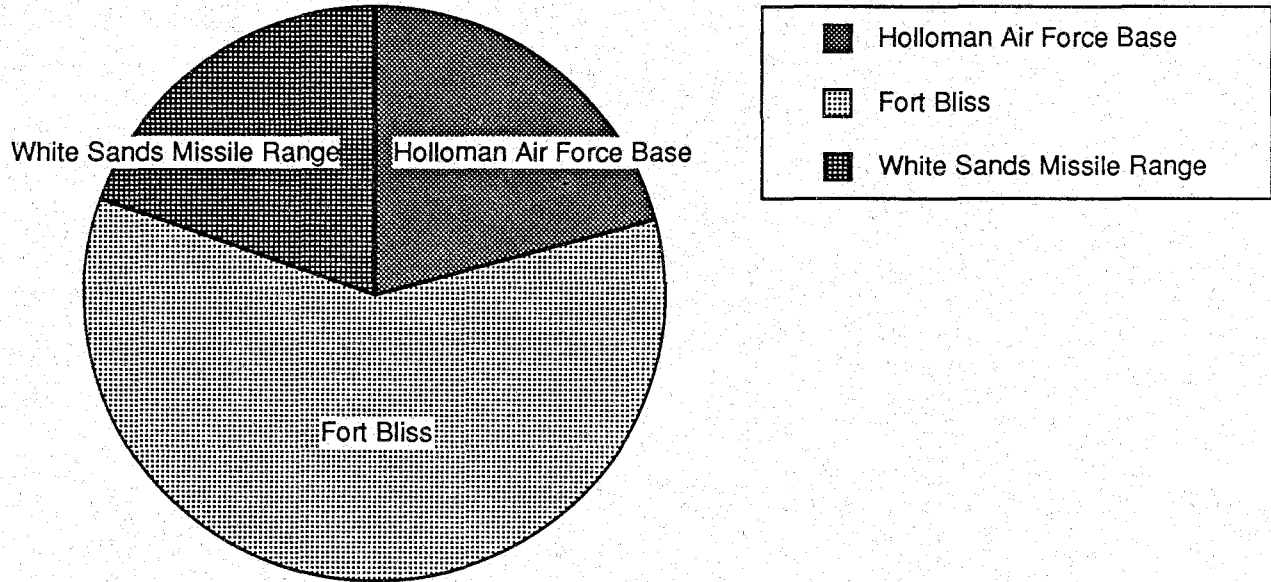
Paso del Norte Community Profile Civilian Labor Force Statistics for 1990

Area	Employment	Unemployment	Labor Force	Rate
Texas				
Brewster	3,753	159	3,912	4.1%
Culberson	1,536	112	1,648	6.8%
El Paso	223,901	26,892	250,793	10.7%
Hudspeth	1,194	43	1,237	3.5%
Jeff Davis	863	31	894	3.5%
Presidio	1,864	372	2,236	16.6%
New Mexico				
Dona Ana	55,207	3,961	59,168	6.7%
Eddy	18,610	1,381	19,991	6.9%
Lincoln	6,145	363	6,508	5.6%
Luna	5,289	785	6,074	12.9%
Otero	17,235	1,322	18,557	7.1%
Sierra	2,618	146	2,764	5.3%
Ciudad Juarez	237,550	5,651	243,201	2.3%
Total	575,765	41,218	616,983	6.7%

Source: Texas Employment Commission, New Mexico Department of Labor, Desarrollo Economic Development of Chihuahua

Military Bases

Total Economic Impact of Military Bases 1990



Holloman Air Force Base

Military Payroll	113,243,656
Civilian Payroll, NAF	30,966,420
Civilian Payroll Civilian Social	45,976,630
Military Expenditures	161,643,206
Total	266,446,973

Fort Bliss

Direct Economic Impact	587,108,700
Pensions to Military Retirees	148,061,978
Dollars Spent by Foreign Military Personnel	21,342,360
Federal Money Going to El Paso School Districts	2,336,388
Total	758,849,426

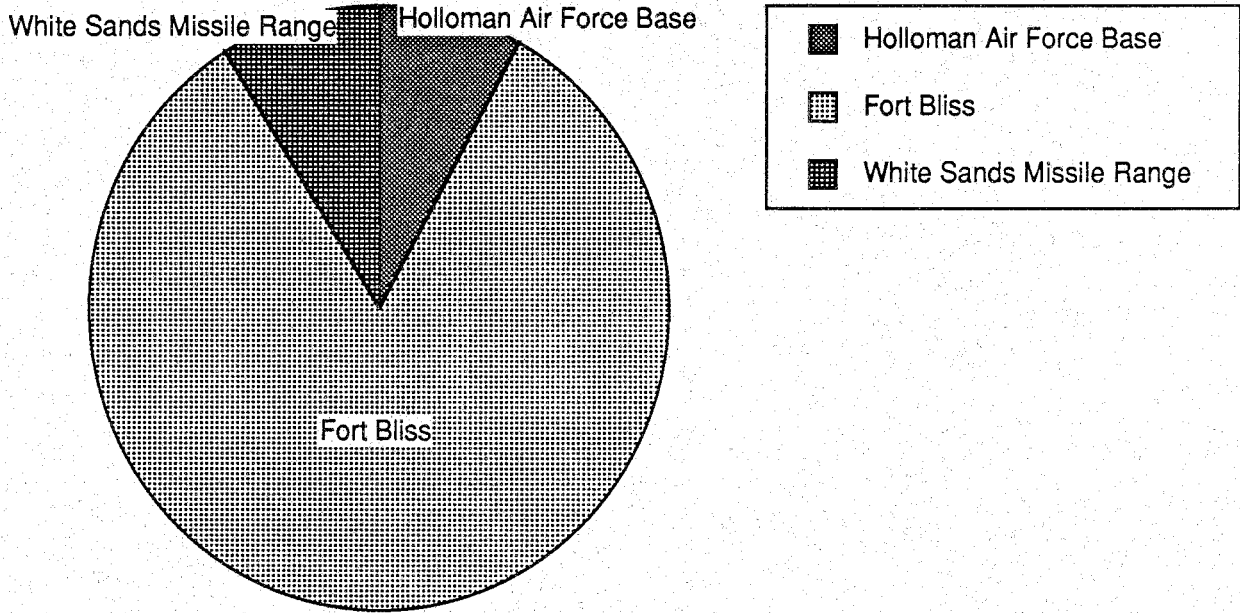
White Sands Missile Range

Economic Impact	253,970,484
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Total Economic Impact **1,279,266,883**

Source: Public Affairs Office, Fort Bliss; White Sands Missile Range Public Affairs Office; Holloman Air Force Base

Total Military Base Population 1990



Holloman Air Force Base

Military Population	5,107
Civilian Employees	2,483
Secondary	1,306
Total	8,896

Fort Bliss

Military Population	20,241
Civilian Employees	7,720
Others	49,381
Retirees	15,052
Total	92,394

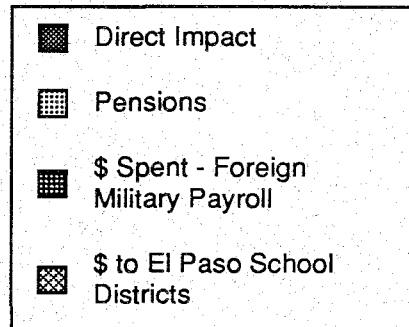
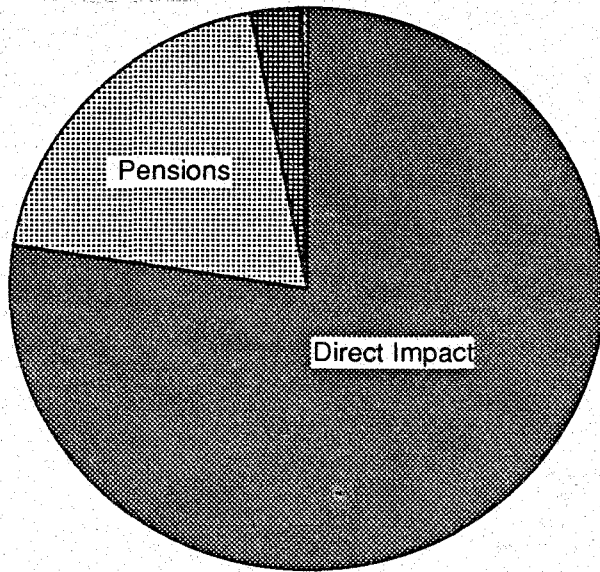
White Sands Missile Range

Total Employees	9,780
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Total Population	110,070
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Source: Public Affairs Office, Fort Bliss; White Sands Missile Range Public Affairs Office; Holloman Air Force Base

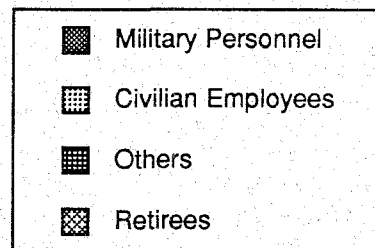
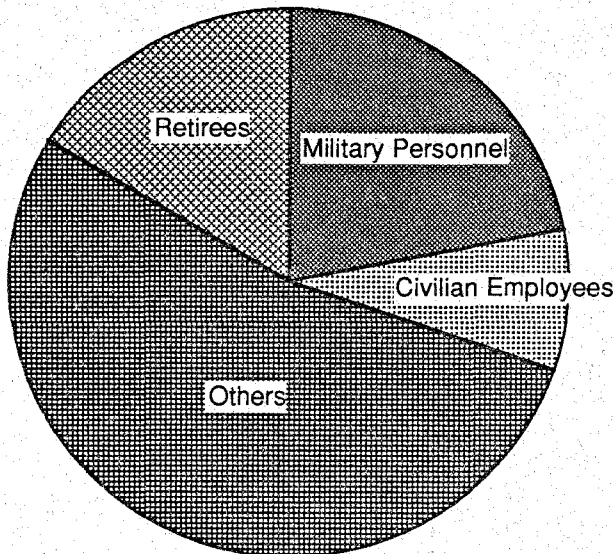
Economic Impact of Fort Bliss on the Local Economy Fiscal Year 1990 (October 1989 - September 1990)



Direct Economic Impact	587,108,700
Pensions to Military Retirees	148,061,978
Dollars Spent by Foreign Military Personnel	21,342,360
Federal Money Going to El Paso School District	2,336,388
Total Economic Impact	\$758,849,426

Note: Direct economic impact includes military and civilian payroll, military construction, and Fort Bliss purchase of goods.

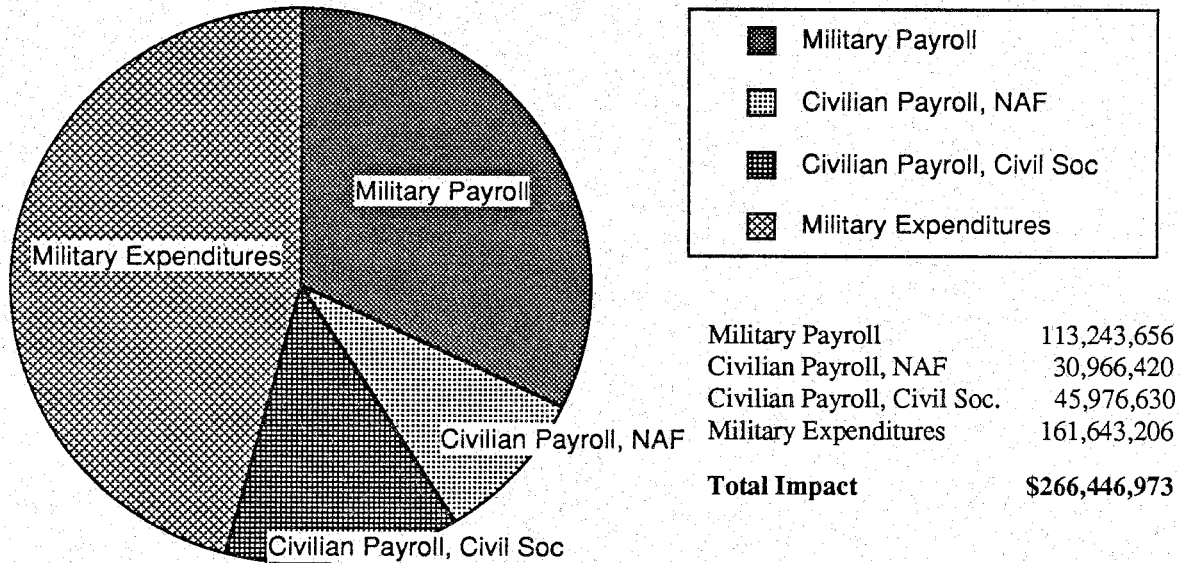
Fort Bliss Population September 1990



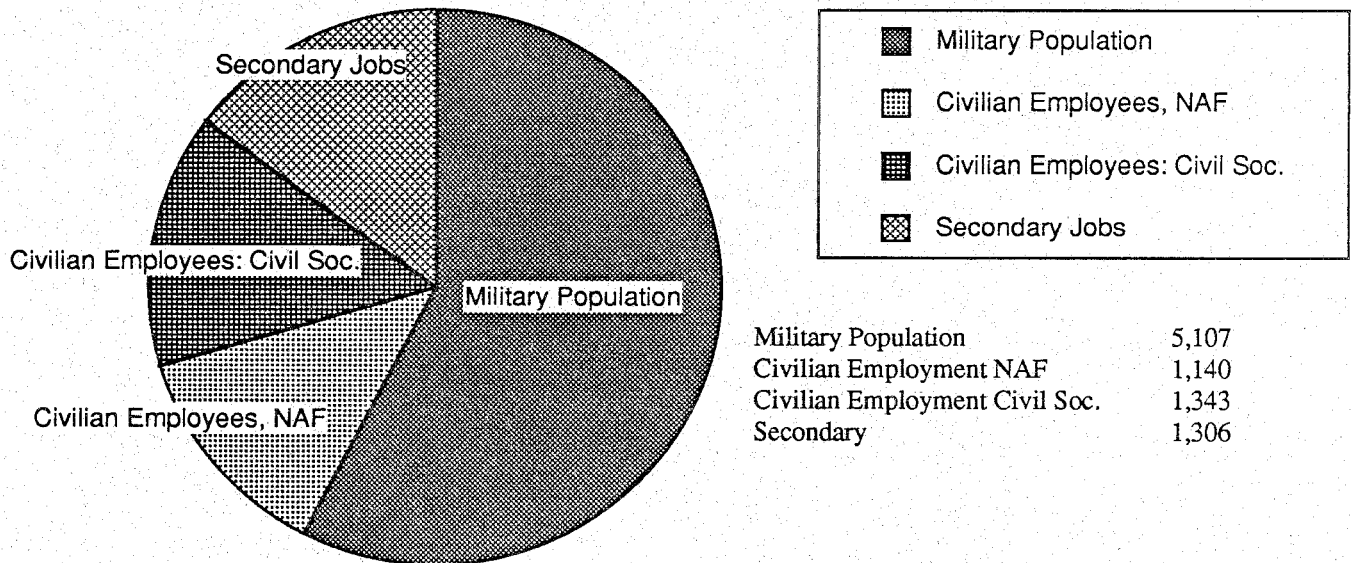
Military Personnel	20,241	21.9%
Civilian Employees	7,720	8.4%
Others	49,381	53.4%
Retirees	15,052	16.3%

Source: Public Affairs Office, Fort Bliss

Economic Impact of Holloman Air Force Base on the Local Economy Fiscal Year 1990 (October 1989 - September 1990)

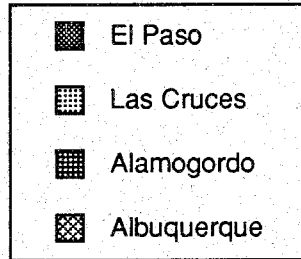
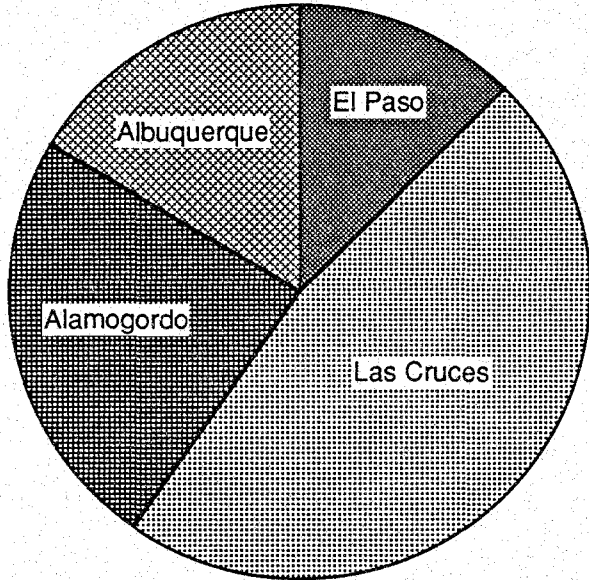


Holloman Air Force Base Population



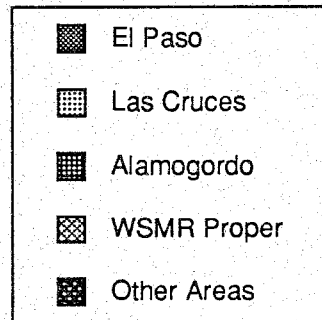
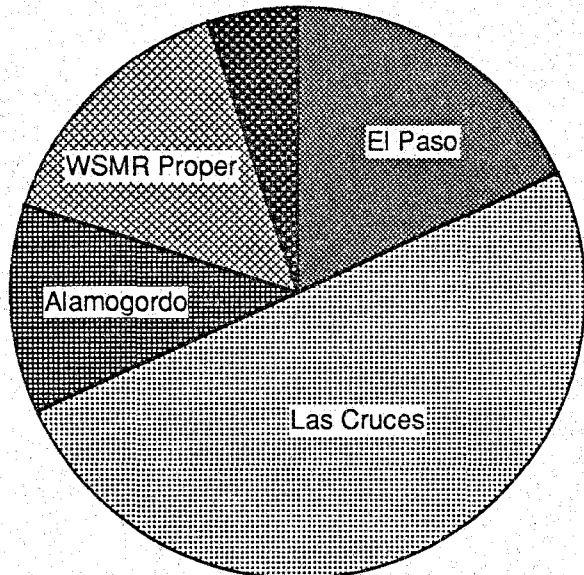
Source: Holloman Air Force Base

**White Sands Missile Range Local Purchase Contracts
Fiscal Year 1990: \$253,970,484**



	Dollars	Percent of Total
El Paso	31,862,714	12.6
Las Cruces	119,686,789	47.1
Alamogordo	60,993,173	24.0
Albuquerque	41,427,808	16.3
Total	253,970,484	

**White Sands Missile Range Employment by Residence
Fiscal Year 1990: 9,780**



	Employees	Percent of Total
El Paso	1,760	18
Las Cruces	4,890	50
Alamogordo	1,174	12
WSMR Proper	1,467	15
Other Areas	489	5

Source: White Sands Missile Range Public Affairs Office

Maquiladoras

Maquiladoras

Production-sharing (maquiladoras) began with the introduction of Mexico's Border Industrialization Program (BIP) in 1965. The program was initiated to stimulate employment for Mexican workers located in Mexico's northern border states. On the U. S. side, the issue was one of industrial competitiveness. When the BIP program was initiated, U.S. industry was being challenged by foreign competition. (Industrial competitiveness is defined as the ability of a country to sell its wares at a competitive price for a fair rate of return while maintaining or increasing the real wages for the country's workers.) In response to this challenge, American firms found that Mexico's BIP provided access to an abundant source of low-cost labor, sufficient to reduce the total cost of business for American firms, thereby enabling the firms to achieve price competitiveness.

The attractiveness of the maquiladora program has been its access to abundant low-cost labor and the productivity of Mexican workers. The in-bond (temporary importation into Mexico without duty on materials for processing and exportation) was an incentive provided by the Mexican government. The U.S. government has provided its own incentives. U.S. Customs Harmonized Codes 9802.00.60 and 9802.00.80 exempt U.S. materials processed off shore by foreign companies from U.S. customs duties.

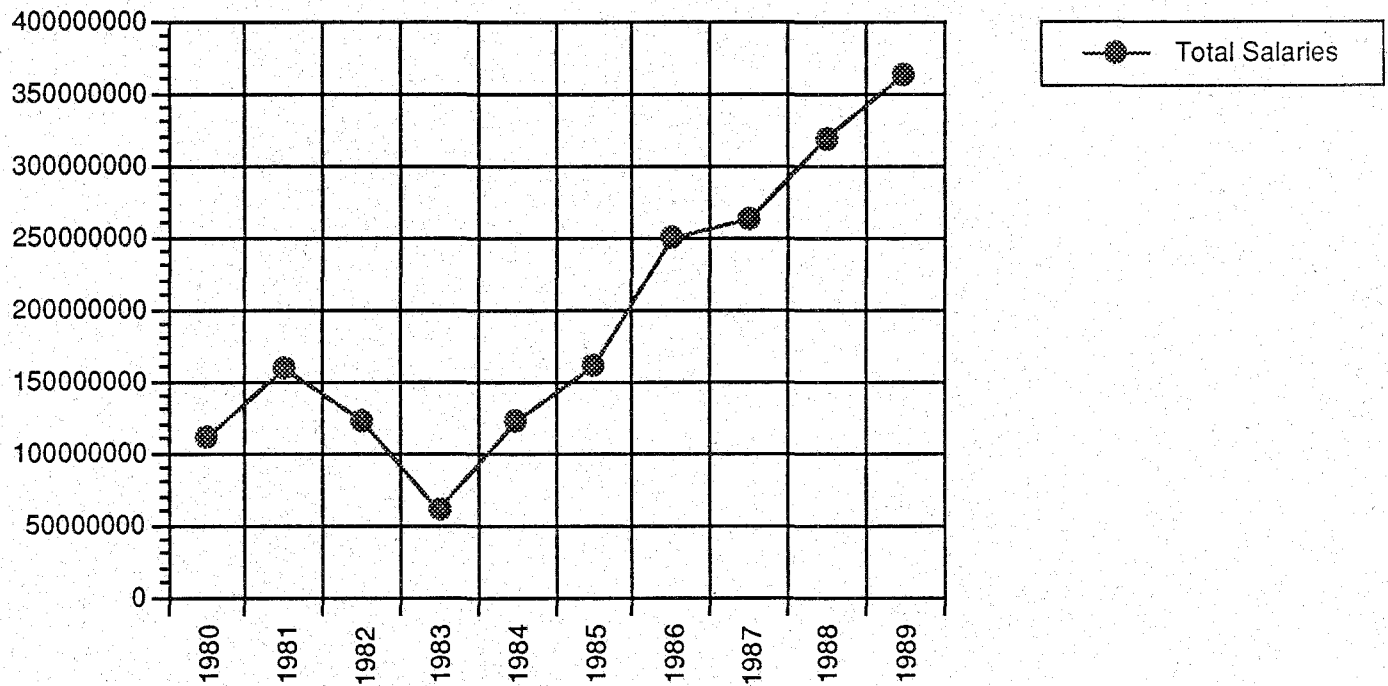
The maquiladora program is open to all investors who incorporate in Mexico. In contrast, U.S. Customs Harmonized Codes are available to foreign producers worldwide using American materials.

According to a report published by the El Paso Foreign Trade Association in 1987, *Maquiladora Impact Survey: Findings and Conclusions*, the maquiladoras have played a critical role in reestablishing the price competitiveness of American firms and in stimulating the recent increase in American manufacturing jobs.

The economic impact of the maquiladora program on the Paso del Norte trade area has been dramatic. *Project Link* (El Paso Foreign Trade Association, 1986) concluded that one in every five new jobs in El Paso (1976-85) was directly associated with the growth of the maquiladoras in Juarez. The study found that approximately 7,000 jobs for El Paso residents could be attributed to the maquiladora industry. Grupo Bermudez completed a market survey in 1987 that indicated maquiladoras employ, directly or indirectly, approximately 55,000, or 23 percent, of the El Paso workforce. Furthermore, the dramatic increase in manufacturing sales (1978-90) can be attributed to the rapid expansion of the industry. Maquiladoras in the Paso del Norte region account for 40 percent of the impact of the industry nationally.

Finally, maquiladoras epitomize the essence of the Paso del Norte's economy. El Paso is primarily a logistics center in the global economy. For example, El Paso has the 30th largest air freight terminal in the United States. The Paso del Norte region is a materials management center in the global economy. These are the ingredients necessary to maintain a self-sufficient competitive position in the global economy. By exporting these resources, the region maintains a competitive position in the global economy.

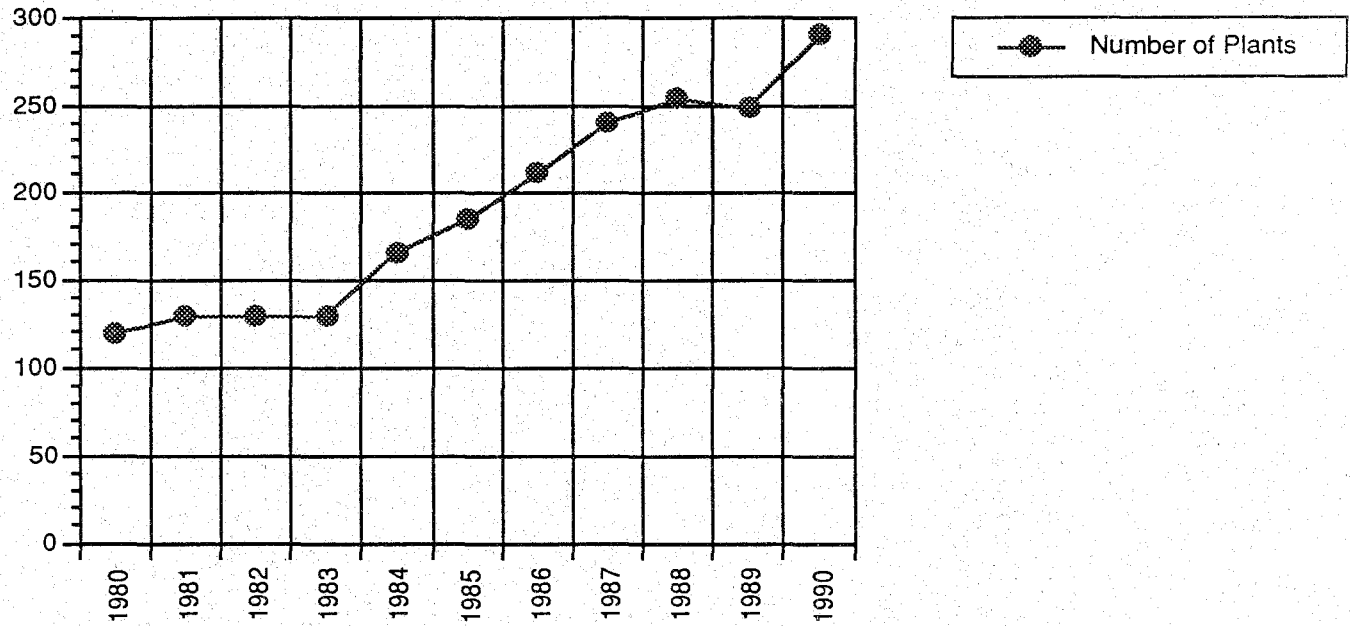
Juarez Maquiladora Industry Growth Total Salaries



Year	Total Salaries (\$)	Percent Annual Increase
1980	110,734,337	-
1981	157,668,920	42.4
1982	122,246,946	-22.5
1983	60,300,100	-50.7
1984	121,914,663	102.2
1985	160,087,344	31.3
1986	249,097,256	55.6
1987	262,305,129	5.3
1988	318,000,000	21.2
1989	363,078,660	14.2

Source: AMCHAM, American Chamber of Commerce of Mexico, A.C.

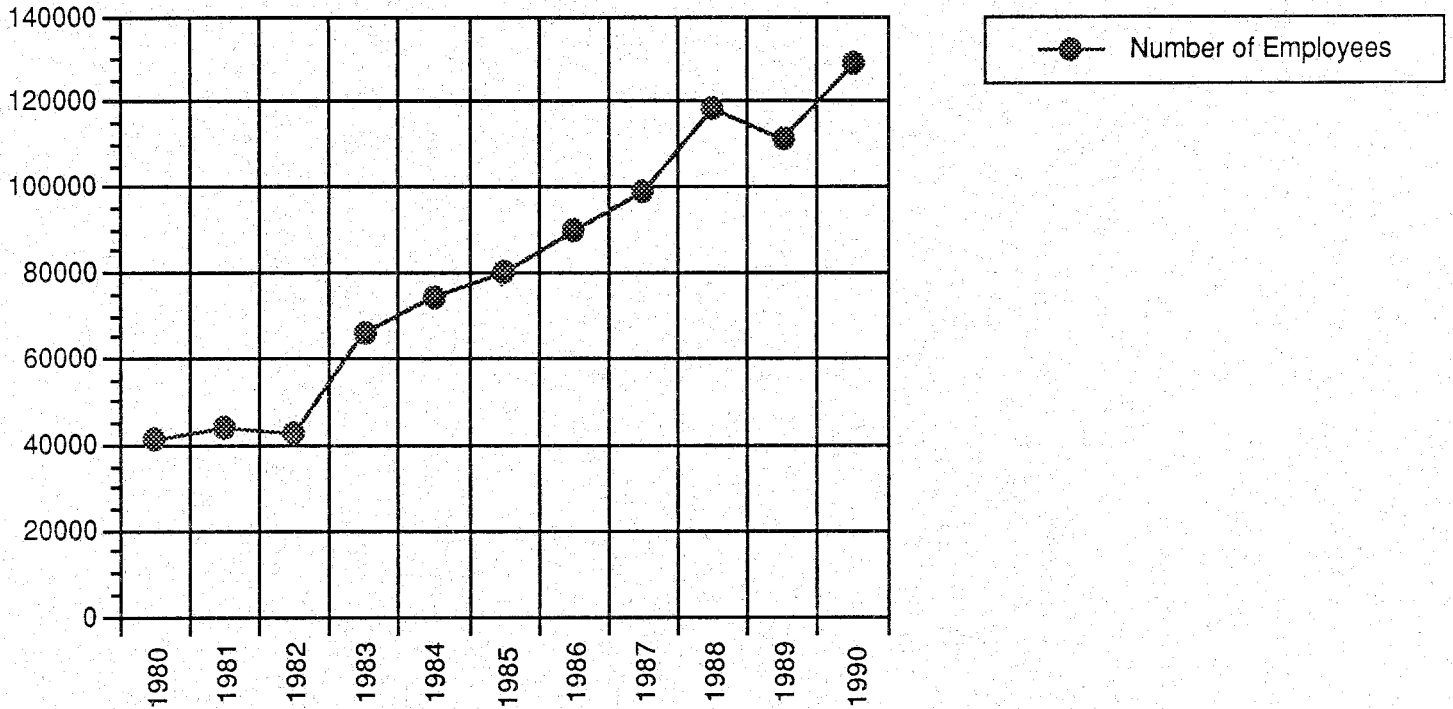
Juarez Maquiladora Industry Growth Number of Plants



Year	Number of Plants	Percent Annual Increase
1980	119	-
1981	128	7.6
1982	129	.8
1983	150	16.3
1984	165	10.0
1985	184	11.5
1986	210	14.1
1987	240	14.3
1988	254	5.8
1989	248	-2.4
1990	290	16.9

Source: AMCHAM, American Chamber of Commerce of Mexico, A.C.

Juarez Maquiladora Industry Growth Number of Employees



Year	Number of Employees	Percent Annual Increase
1980	41,525	-
1981	43,601	5.0
1982	42,810	-1.8
1983	66,000	54.2
1984	74,547	13.0
1985	80,000	7.3
1986	89,600	12.0
1987	98,850	10.3
1988	118,122	19.5
1989	110,999	-6.0
1990	128,829	16.0

Source: AMCHAM, American Chamber of Commerce of Mexico, A.C.

Juarez Maquiladora Indicators 1989

	1989			Juarez Percent of Total	
	Juarez	Chihuahua	Mexico	State of Chihuahua	Mexico
Employees	124,386	165,126	429,725	75.3	28.9
Man Hours	18,073	23,605	65,494	76.6	27.6
Added Value	\$844	\$1,076	\$2,882	78.4	29.3
Salaries	\$452	\$586	\$1,465	77.1	30.9
Imports	\$2,304	\$2,934	\$8,908	78.5	25.9
Domestics	\$24	\$28	\$142	85.7	16.9
Expenses	\$251	\$322	\$794	78.0	31.6

Juarez Maquiladora Indicators 1986-1989

	1986	1989	Growth (%)
Employees	86,526	124,386	43.8
Man Hours	12,177	18,073	48.4
Added Value	\$440	\$844	91.8
Salaries	\$200	\$452	126.0
Imports	\$1,099	\$2,304	110.0
Domestics	\$13	\$24	84.6
Expenses	\$2.9	\$251	855.5

Note: Expenses do not include utilities because rates have remained fairly constant.

Maquiladora Utilities and Overhead Expenses Juarez 1988-1989 (000,000s)

Expenses	1988		1989		Growth (%)
	Dollars	Percent of Total	Dollars	Percent of Total	
Utilities	89.8	31.5	116.7	31.7	35.4
Machine\Equipment	3.2	1.1	2.6	.7	13.4
Rental\Mortgage	11.2	16.1	13.6	5.4	26.8
Electric	17.2	6.0	24.2	6.6	46.8
Telephone	4.1	1.4	5.5	1.5	39.5
Customs	5.7	2.0	6.4	1.7	17.2
Transportation	8.8	3.1	10.9	3.0	28.9
Building					
Maintenance	29.5	10.4	35.4	9.6	24.8
Other	115.5	40.5	152.8	41.5	37.8
Total	285.1	100.0	368.1	100.0	34.6

Source: INEGI

Maquiladora Plants by Principal Cities and States

	December 1989			December 1990		
	Plants	Employees	Value Added	Plants	Employees	Value Added
Nationally	1,795	437,064	3,056.9	1,920	446,258	3,454.6
Border States	1,651	410,605	2839.7	1,735	415,344	3183.9
Baja California NTE	730	85,566	634.5	723	85,630	708.9
Ensenada	31	1,735	6.7	39	2,567	11.6
Mexicali	147	20,576	181.9	139	21,839	199.7
Tecate	74	4,665	34.9	76	4,598	35.4
Tijuana	478	58,590	410.8	469	56,617	462.0
Baja California SUR	13	1,042	3.3	10	821	3.4
Coahuila	127	30,486	128.4	153	34,256	165.4
Cd. Acuna	44	14,151	60.3	47	15,877	73.4
Piedras Negras	42	8,130	37.6	45	7,576	38.9
Torreon	-	-	-	21	3,467	16.6
Others	41	8,205	30.4	40	7,336	36.3
Chihuahua	343	164,642	1,141.5	360	162,820	1,213.5
Cd. Juarez	261	122,452	895.6	275	123,046	945.8
Cd. Chihuahua	58	29,229	199.3	60	27,648	206.9
Others	24	12,961	46.6	25	12,126	60.7
Jalisco	36	5,824	96.6	44	6,952	99.4
Guadalajara	17	4,569	68.9	22	5,457	76.6
Others	19	1,255	27.6	22	1,495	22.7
Estado de Mexico & Mexico City	16	1,629	10.9	23	2,857	29.9
Nuevo Leon	66	11,853	111.6	81	15,748	232.7
Monterrey	15	1,756	28.5	18	1,619	18.3
Guadalupe	-	-	-	20	4,240	33.0
Others	51	10,097	83.0	43	2,889	95.8
Sonora	144	37,747	226.7	149	37,564	147.2
Agua Prieta	25	6,160	37.8	26	6,196	39.3
Nogales	73	21,084	141.5	61	17,694	128.4
San Luis Rio Colorado	-	-	-	15	2,273	14.5
Hermosillo	-	-	-	16	3,887	18.7
Others	46	10,503	47.3	31	7,514	31.6
Tamaulipas	228	79,269	593.7	259	78,505	712.8
Matamoros	94	38,268	299.7	94	37,236	363.7
Nuevo Laredo	63	16,162	114.0	65	15,581	147.1
Cd. Reynosa y Rio Bravo	71	24,839	179.9	75	23,675	196.0
Others	-	-	-	25	2,013	5.9
Other States	92	19,006	109.3	118	21,105	140.9

Source: AMCHAM, American Chamber of Commerce of Mexico, A.C.

Paso del Norte Linkages

Introduction

Although the immediate trade area of the Paso del Norte region includes West Texas, Southern New Mexico and the State of Chihuahua, its nucleus is the interplex consisting of El Paso, Las Cruces/Dona Ana County, and Juarez. This nucleus has a combined population of over 1.69 million people and a civilian workforce of over 600,000. This qualifies the Paso del Norte as one of the major metroplexes nationally and the largest metroplex between Dallas-Ft. Worth, Texas and Phoenix, Arizona. El Paso serves as the region's arterial hub. Its interstate highways and international airport link the region to Texas and national markets. Its ports of entry rank among the world's busiest. With its material management resources the region has the necessary ingredients (except investment capital) to be a strong, self-sustaining and competitive force.

In addition, El Paso serves the region as a distribution, financial, educational and medical center. For example, 30 percent of hospital admissions for the Las Cruces area take place in El Paso hospitals. El Paso clinics and hospitals also provide medical services for residents of Juarez and the State of Chihuahua. The University of Texas at El Paso participates in several programs in Mexico that include the sharing of faculty, educational curricula and services. Mexican residents constitute a major source of deposits and business for El Paso banks and other financial institutions. During 1987, Mexican depositors contributed \$716 million and Mexico's maquiladoras had cash flows exceeding \$965 million. These bank deposits accounted for more than 47 percent of total El Paso deposits in 1987.

New Mexican agricultural products are processed in and distributed through El Paso by such nationally recognized companies as Old El Paso, Mountain Pass and Azar Nuts.

Due to its economic and cultural richness, the Paso del Norte has forged extensive links regionally, nationally and internationally.

Regional

The defense industry and international trade have had a dramatic impact on the El Paso/Cd. Juarez/Dona Ana County Interplex. The defense industry links El Paso and Southern New Mexico. Defense has the potential to develop further the economic linkages between El Paso and the maquiladoras in Juarez. The maquiladoras, in turn, have changed the very fiber of El Paso's economy. The industry accounts for a significant proportion of money spent for goods and services, transportation, leases of industrial and office space and local employment. Maquiladora direct expenditures totaled more than \$360 million in the El Paso economy in 1987. Direct bank cash flows totaled approximately \$965 million, and direct wages paid to Mexican workers in Juarez totaled \$282.5 million dollars.

Similarly, there is a strong correlation between the increase in the number of maquiladora plants in Juarez and the number of new businesses opening in El Paso. These businesses help explain the more than 45,000 direct and indirect

jobs held by El Paso residents as a result of this industry. These jobs account for an estimated 23.2 percent of El Paso's total employment. As the industry continues to penetrate Mexico's interior, El Paso will become the regional headquarters for administrative, communications and logistics activities.

Recent data also attribute the formation of a U.S.-Mexico border economy to the maquiladoras. As stated previously, U.S. and Mexican border communities once represented isolated urban enclaves situated at the international boundary along exclusively north-south trade routes serving the United States and Mexico. The advent of the maquiladoras introduced significant east-west trade among the border communities. Plant and shipment statistics for the industry suggest that one-third of total business among the plants is conducted intraregionally among businesses in Texas, New Mexico, Arizona and California. This is the initial indication that the U.S.-Mexico border represents a regional economy with common challenges and issues.

National

Although there are some who consider El Paso and the Paso del Norte to be isolated and remote, the region has not been isolated from the national economies of the United States or Mexico. In the United States, the region is noted for its defense and international business sectors. Fort Bliss and White Sands Missile Range are renowned for the role they play in military training, and White Sands is the testing center for the nation's latest and highest technologies. Fort Bliss is El Paso's largest single employer with military and civilian personnel totaling 27,924. White Sands employs an additional 1,760 El Pasoans.

The maquiladoras have integrated the Paso del Norte into the economies of the United States and Mexico. The industry ranks second (behind petroleum) in Mexico in the generation of foreign capital. Of the approximately 1,655 plants, in 1990, about 250, or 15 percent, have operations in Juarez. These plants employ more than 124,000, or 29 percent, of the 430,000 Mexican workers employed by the industry nationally. Given these data, Paso del Norte is inextricably linked to the industrialization of Mexico's economy.

Previous research compiled by Grupo Bermudez, the El Paso Foreign Trade Association and the U.S. International Trade Commission documents the economic impact of the maquiladoras on the economy of the United States. These data show that maquiladoras located in the Paso del Norte region account for approximately 40 percent of the total impact of the industry on the U.S. economy. According to *The Maquiladora Impact Survey*, plants in Juarez support more than 620 U.S. major companies and 333,000 American jobs distributed nationwide. These data lend credence to the role the maquiladoras play in the U.S. economy. Maquiladoras source at least 65 percent of their materials and components from the United States (from more than 20,000 suppliers). The data also suggest a tremendous increase in U.S. manufacturing jobs nationwide. Hence, Paso del Norte businesses play a vital role in the industrial competitiveness of American industry.

Few people are aware of, or appreciate, the Paso del Norte's international linkages. First, the aforementioned military installations are training centers for U.S. and foreign military personnel. Fort Bliss is the home of the largest air defense center in the world. Here, more than 1,000 German military personnel are assigned to the German Air Force Training Command and Air Defense School. This facility is the largest German command located outside of Germany. Additionally, more than 2,000 foreign troops from 28 nations train at the Air Defense School.

The Paso del Norte has grown into a major distribution center for multinational corporations. The industry uses El Paso's distribution facilities as a staging area for materials from the Far East and Europe. Maquiladoras from France, Finland, Germany and Japan operate in Juarez. According to U.S. Customs information, the El Paso-Juarez port of entry clears commercial shipments for distribution to 25 different countries including Australia, Canada, Honduras, Japan, Peru, Taiwan and West Germany.

Paso del Norte Community Profiles

El Paso Profile

The Paso del Norte trade area, which encompasses the vast regions of far West Texas, Southern New Mexico and the State of Chihuahua, Mexico, from Ciudad Juarez to Chihuahua City, has as its focal point the city of El Paso.

Historically, El Paso has been at the center of more than one major trade route. As the Pass of the North, El Paso served as the major link on the famous Camino Real, the Spanish highway that tied Mexico City to Santa Fe. Later, during the western expansion of the United States, El Paso again served as a major link on the Butterfield Trail, the southernmost east-west trade route.

El Paso sits in a uniquely advantageous position. It is equidistant from major western cities: Dallas, Denver, Los Angeles. In addition, El Paso is the largest port of entry along the U.S.-Mexican border, each day clearing over 850 commercial vehicles through U.S. Customs and each year clearing more than 15 million people through U.S. immigration. This central location allows El Paso to serve as a major distribution center for the Southwest and as a major import-export center for U.S.-Mexico trade.

The El Paso community has several significant socioeconomic characteristics: its population, age distribution, ethnicity, immigration, family size and fertility rates. Economic factors that affect the community are the types of industry located in El Paso, employment, income and poverty levels. The relevance of this information becomes evident when it is contrasted with similar data for the state of Texas as a whole:

- **Population:** El Paso SMSA contains approximately 591,610 people (1990). During 1970-1980, the community was one of the state's fastest growing SMSAs: El Paso's growth rate was 36.1 percent compared to 27 percent for the state of Texas. The 1980-1990 rate for El Paso was 23.3 percent; the Texas rate was 19.4 percent.
- **Migration:** A significant factor in El Paso's population has been the migration of residents from the interior of Mexico and from other U.S. communities. Immigration from Mexico was dominant, supported by the fact that 21 percent of El Paso's population is foreign born and over 50 percent of El Paso's households speak Spanish as the language of preference. In contrast, Texas' foreign-born population is 6 percent of the total, most households are English dominant and a proportionately higher percentage of newcomers are from U.S. regions rather than Mexico.
- **Ethnicity:** In 1970 the Hispanic community represented 62 percent of El Paso's population. That percentage has increased to 69.6 percent. Although the Texas Hispanic community has likewise increased over the past ten years, it represents only 25.6 percent of the state's total population. It is obvious, however, that the state is becoming what El Paso already is, a bicultural community.

- **Family Size:** El Paso has a total of 178,366 households and an average family size of 3.16 people. This is substantially higher than the state's average of 2.42 people. This large family size is due primarily to a higher fertility rate within the Hispanic community and explains, in part, El Paso's per capita income of \$10,778, which is relatively low compared to the state's average of \$16,702.
- **Age Distribution:** El Paso has a median age of 25. This is in contrast to the Texas figure of 28. Again this disparity can be attributed to the high fertility rate and migration within the Hispanic community. Translated, this population trend shows that El Paso has a high percentage (47.7 percent) of people under the age of 18 years and will continue to be a Hispanic, youth-oriented society.

A comparison of the economies of El Paso and Texas indicates that much similarity exists. For example, services dominate both economies. Neither El Paso nor Texas is heavily dependent on agriculture as a source of employment; however, both are dependent on retail and wholesale trade for substantial employment. The differences between the economies include mining, manufacturing and government. As opposed to the state as a whole, El Paso does not have a vital mining industry. Rather, El Paso employs a higher percentage of its population in manufacturing, especially in the apparel industry and government-related activities.

Like other border communities, El Paso has not shared the economic robustness of the state's economy. In fact, as a percentage of state per capita income, the per capita income for El Paso declined from 72.7 percent to 68.6 percent during the years 1978 to 1988. Because per capita income reflects family size, family income may be a better indicator of the community's standard of living. Unfortunately, family income also is substantially less than the state figure. Given these facts, the obvious conclusion is that poverty in El Paso is high. While 11.8 percent of Texas families fall below the poverty level, 18.6 percent of families in El Paso are living in poverty. Within the El Paso hispanic community, 28.6 percent of all households fall below the poverty level.

Summary

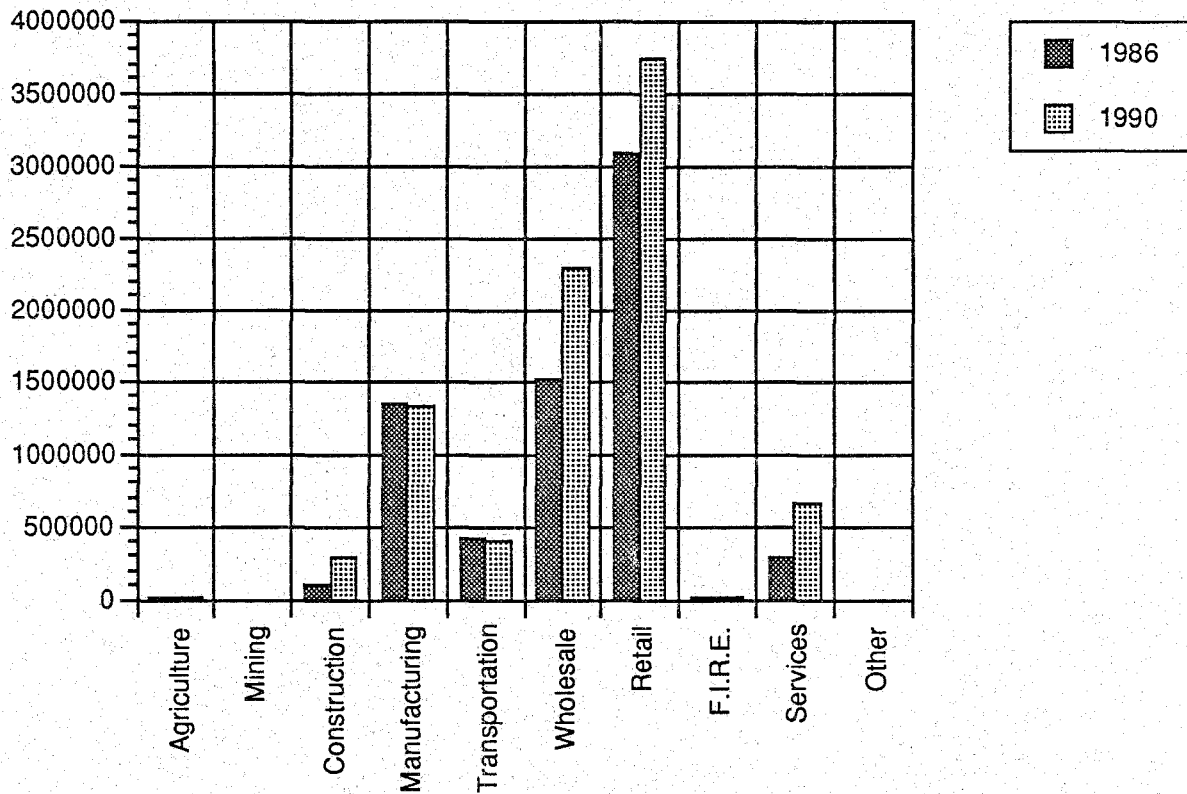
The profile of the El Paso community can be summarized as:

- Rapidly expanding;
- Predominantly Hispanic;
- Primarily youthful; and
- Largely economically disadvantaged.

It is likewise a community that is:

- Vital and energetic;
- Creative and resourceful; and
- Capable and dynamic.

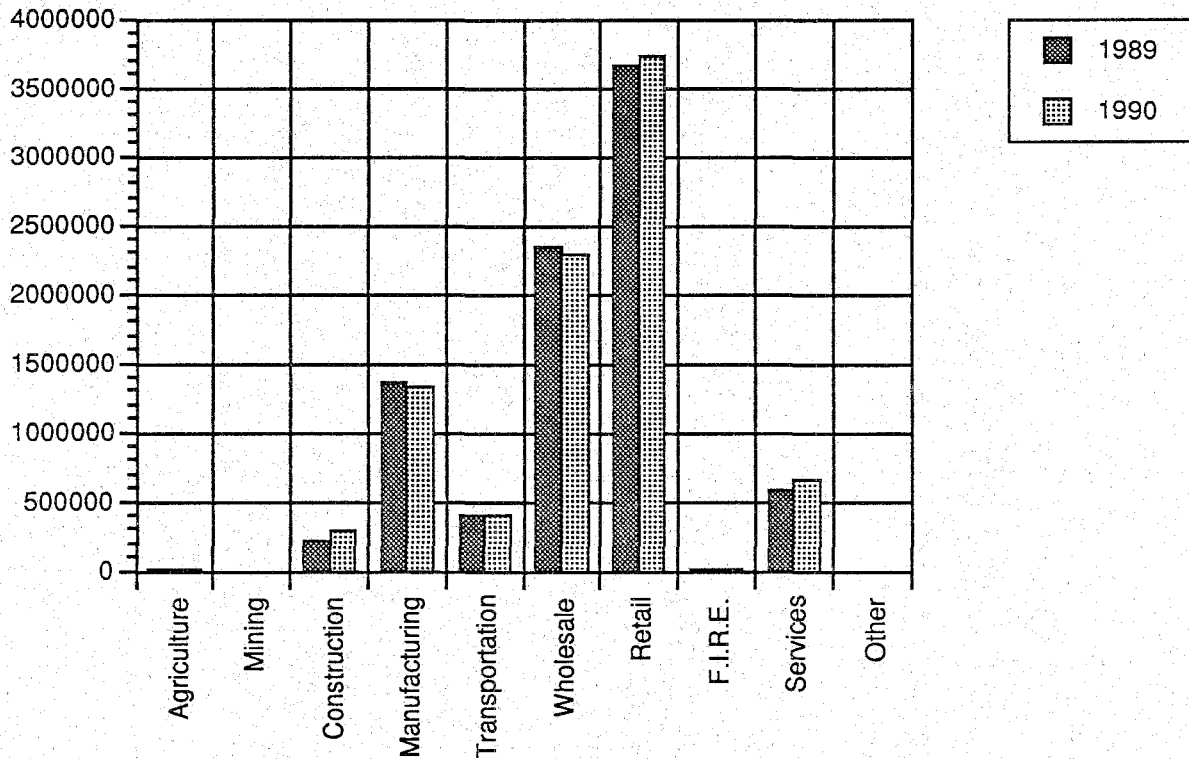
Gross Sector Product El Paso 1986-1990



Industry	1986		1990		Growth (%)
	Dollars (000s)	Percent of Total	Dollars (000s)	Percent of Total	
Agriculture	13,533	.2	11,851	.1	-12.4
Mining	568	.0			-100.0
Construction	111,203	1.6	289,975	3.3	160.8
Manufacturing	1,339,214	19.8	1,323,999	15.2	-1.1
Transportation	417,801	6.2	409,639	4.7	-2.0
Wholesale	1,504,210	22.2	2,282,815	26.1	51.8
Retail	3,078,322	45.5	3,732,468	42.7	21.3
F.I.R.E.	4,244	.1	11,068	.1	160.8
Services	294,893	4.4	668,280	7.7	126.6
Public Admin.					
Other			935		
Government					
Total	6,763,989	100.0	8,731,031	100.0	29.1

Source: U.S. Department of Commerce, Bureau of Economic Analysis

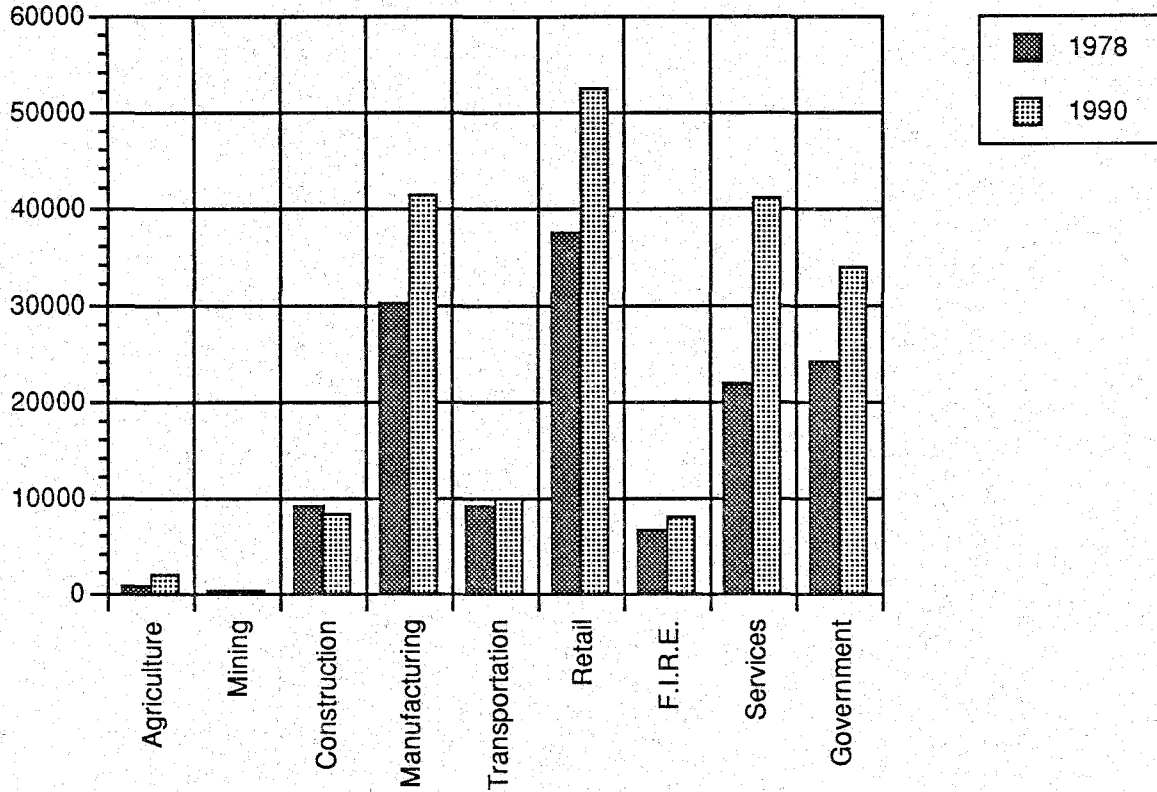
Gross Sector Product El Paso 1989-1990



Industry	1989 (000s)	Percent of Total	1990 (000s)	Percent of Total	Growth (%)
Agriculture	9,448	.1	11,851	.1	25.4
Mining	59				
Construction	217,596	2.5	289,975	3.3	33.3
Manufacturing	1,357,605	15.8	1,323,999	15.2	-2.5
Transportation	400,886	4.7	409,639	4.7	2.2
Wholesale	2,351,331	27.4	2,282,815	26.1	-2.9
Retail	3,653,344	42.5	3,732,468	42.7	2.2
F.I.R.E.	9,404	.1	11,068	.1	17.7
Services	591,375	6.9	668,280	7.7	13.0
Public Admin. Other Government			935	.0	
Total	\$8,591,049	100.0	\$8,731,031	100.0	1.6

Source: Comptroller of Public Accounts, Texas

Employment by Industry El Paso 1978-1990



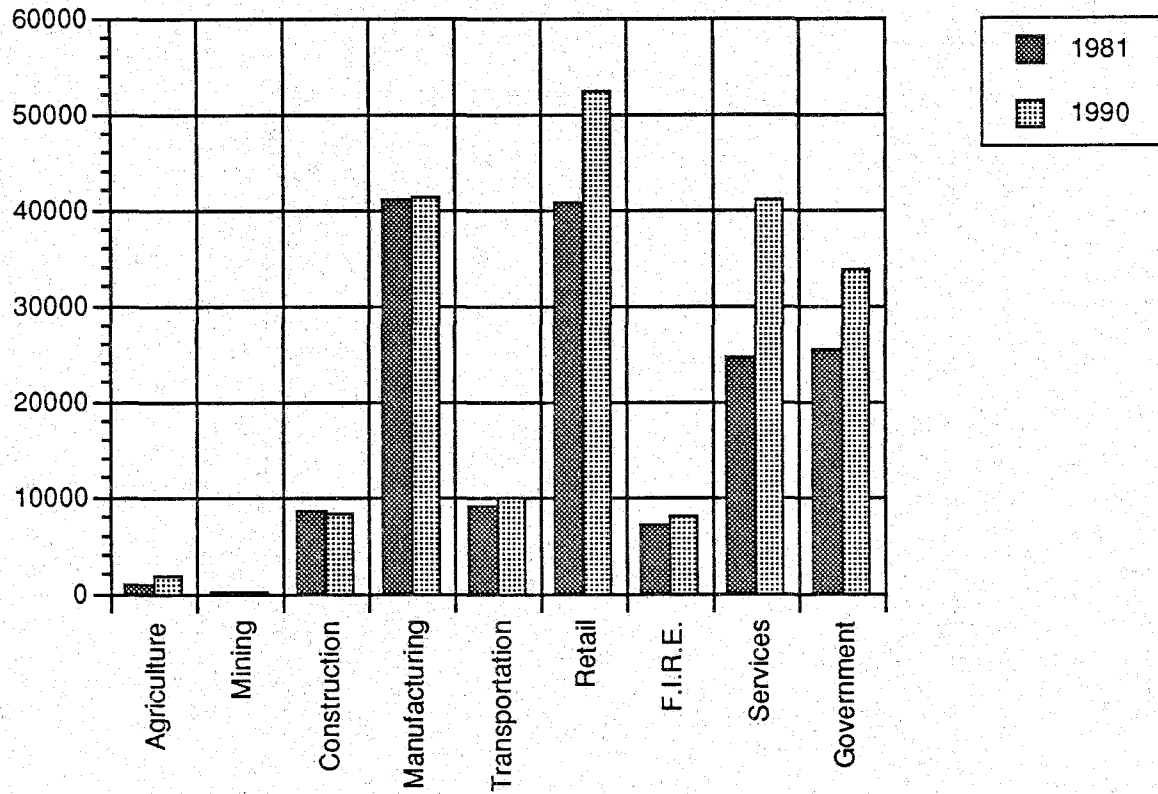
Industry	1978		1990		Growth (%)
	Employment	Percent of Total	Employment	Percent of Total	
Agriculture	737	.7	1,941	1.0	163.1
Mining	195	.1	41	.0	-78.6
Construction	9,140	6.6	8,330	4.2	-8.9
Manufacturing	30,035	21.6	41,369	21.0	37.7
Transportation	8,958	6.5	9,776	5.0	9.1
Wholesale					
Retail	37,383	26.9	52,442	26.7	40.3
F.I.R.E.	6,541	4.7	7,868	4.0	20.3
Services	21,818	15.7	41,053	20.9	88.2
Public Admin.					
Other					
Government	23,937	17.3	33,821	17.2	41.3
Total	138,744	100.0	196,641	100.0	41.7

Note 1: Retail and wholesale have been combined.

Note 2: Blanks within reports represent unavailable data.

Source: Texas Employment Commission

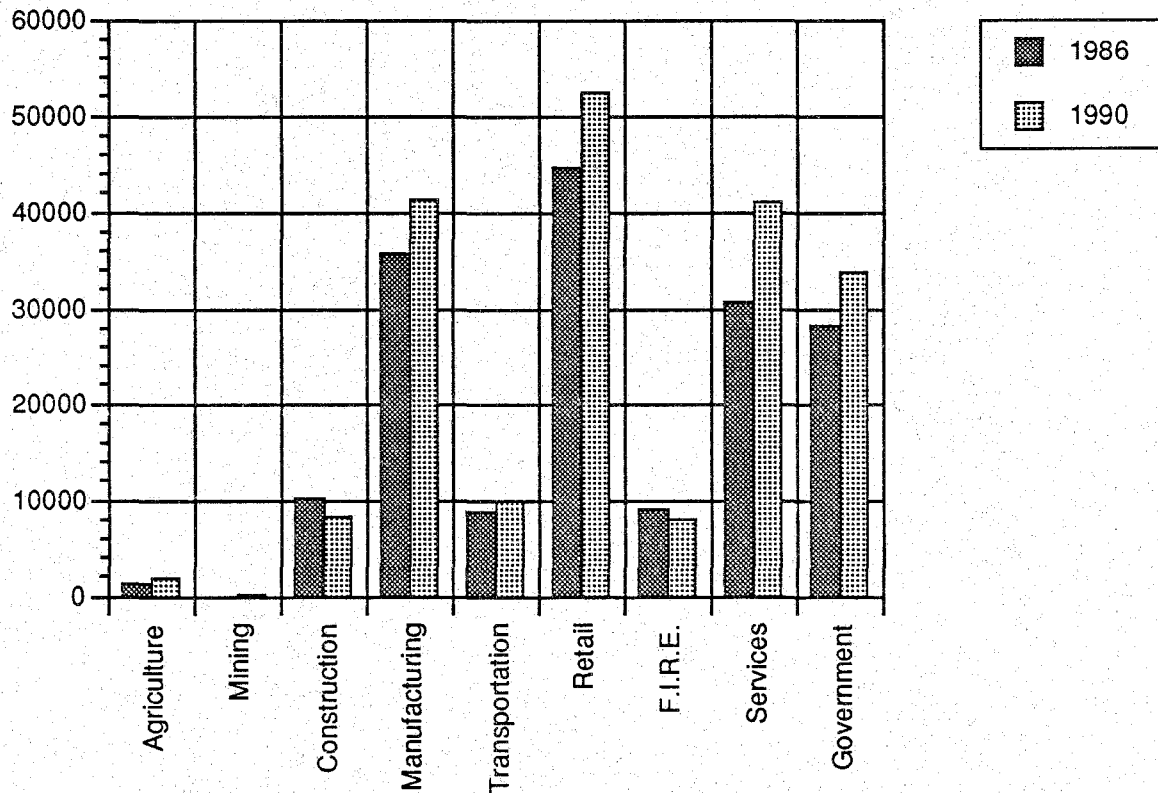
Employment by Industry El Paso 1981-1990



Industry	1981		1990		Growth (%)
	Employment	Percent of Total	Employment	Percent of Total	
Agriculture	892	.6	1,941	1.0	117.5
Mining	249	.2	41	.0	-83.2
Construction	8,630	5.5	8,330	4.2	-3.5
Manufacturing	40,949	26.0	41,369	21.0	1.0
Transportation	9,036	5.7	9,776	5.0	8.2
Wholesale					
Retail	40,737	25.8	52,442	26.7	28.7
F.I.R.E.	7,152	4.5	7,868	4.0	10.0
Services	24,490	15.5	41,053	20.9	67.6
Public Admin.					
Other					
Government	25,520	16.2	33,821	17.2	32.5
Total	157,655	100.0	196,641	100.0	24.7

Source: Texas Employment Commission

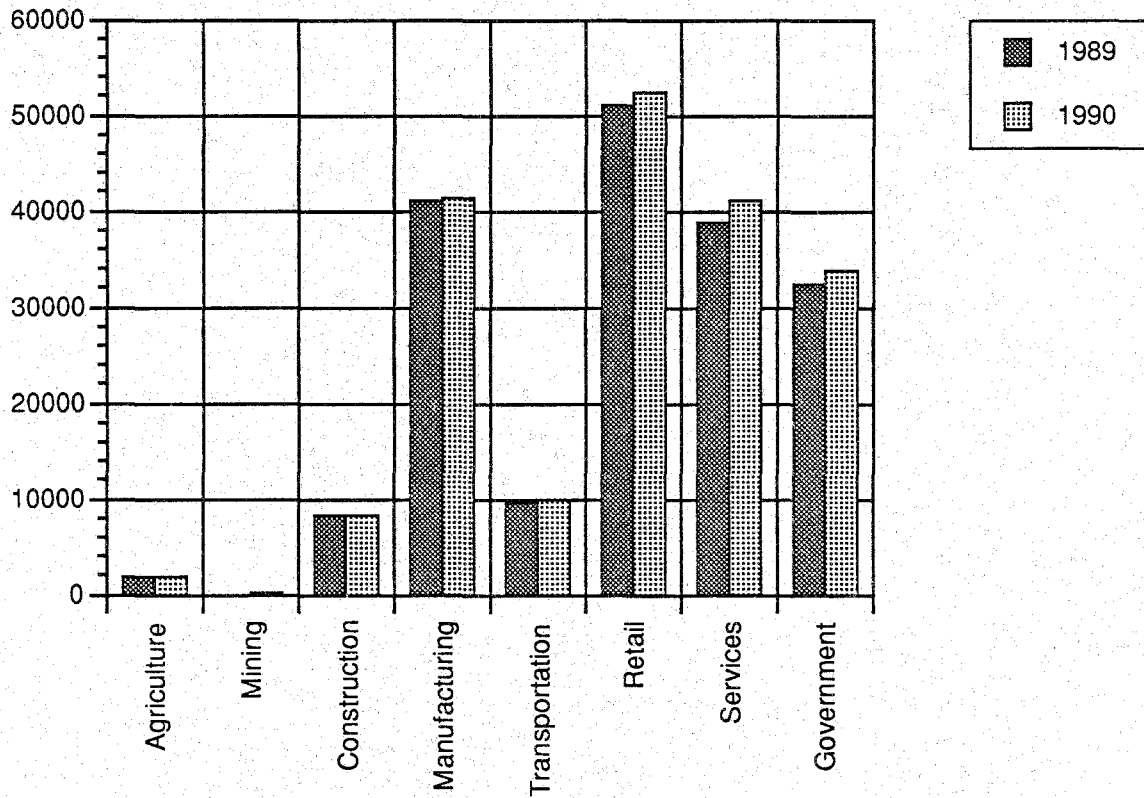
Employment by Industry El Paso 1986-1990



Industry	1986		1990		Growth (%)
	Employment	Percent of Total	Employment	Percent of Total	
Agriculture	1,212	.7	1,941	1.0	60.1
Mining			41	.0	4,100.0
Construction	10,047	6.0	8,330	4.2	-17.1
Manufacturing	35,686	21.2	41,369	21.0	15.9
Transportation	8,722	5.2	9,776	5.0	12.1
Wholesale					
Retail	44,499	26.4	52,442	26.7	17.8
F.I.R.E.	9,062	5.4	7,868	4.0	-13.2
Services	30,781	18.3	41,053	20.9	33.4
Public Admin.					
Other					
Government	28,304	16.8	33,821	17.2	19.5
Total	168,313	100.0	196,641	100.0	16.8

Note 1: Retail and wholesale have been combined.
 Note 2: Blanks within reports represent unavailable data.
 Source: Texas Employment Commission

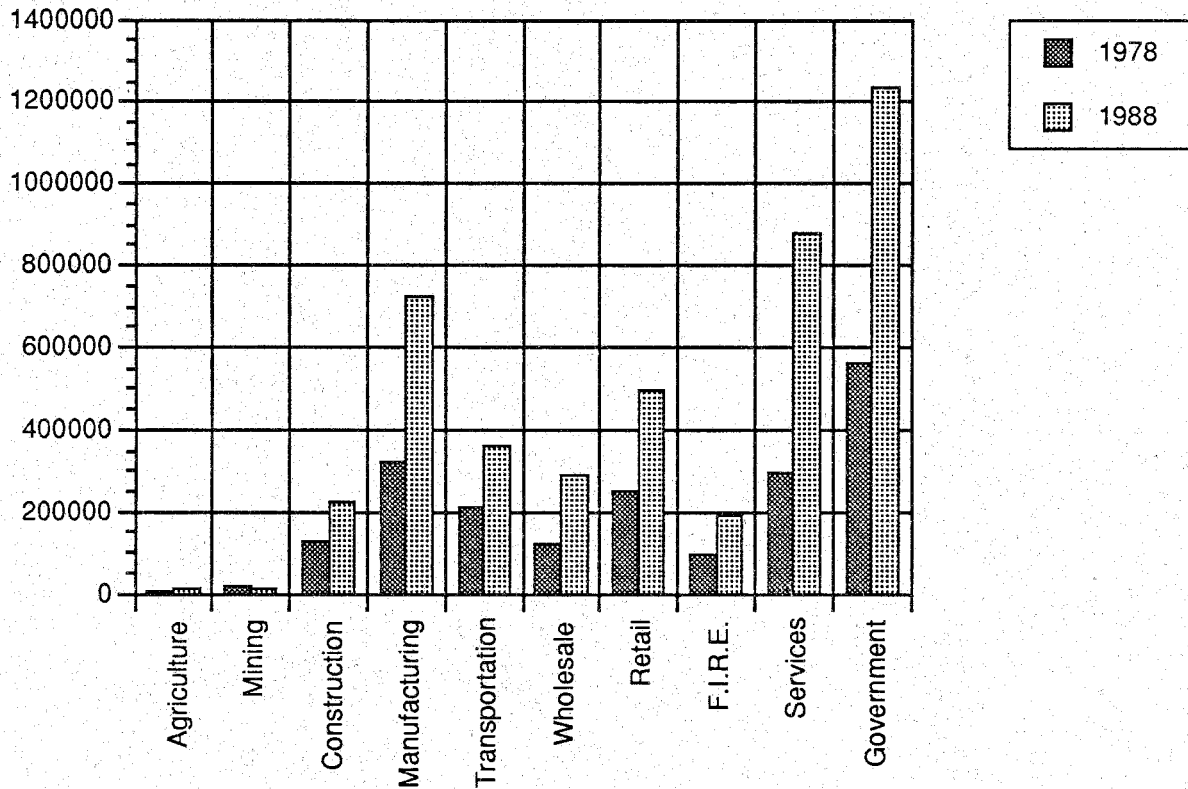
Employment by Industry El Paso 1989-1990



Industry	1989		1990		Growth (%)
	Employment	Percent of Total	Employment	Percent of Total	
Agriculture	1,783	.9	1,941	1.0	8.9
Mining					
Construction	8,117	4.3	8,330	4.2	2.6
Manufacturing	41,086	21.6	41,369	21.0	.7
Transportation	9,611	5.0	9,776	5.0	1.7
Wholesale		.0		.0	.0
Retail	50,968	26.7	52,442	26.7	2.9
F.I.R.E.	8,084	4.2	7,868	4.0	-2.7
Services	38,676	20.3	41,053	20.9	6.1
Public Admin.					
Other					
Government	32,300	16.9	33,821	17.2	4.7
Total	190,625	100.0	196,641	100.0	3.2

Source: Texas Employment Commission

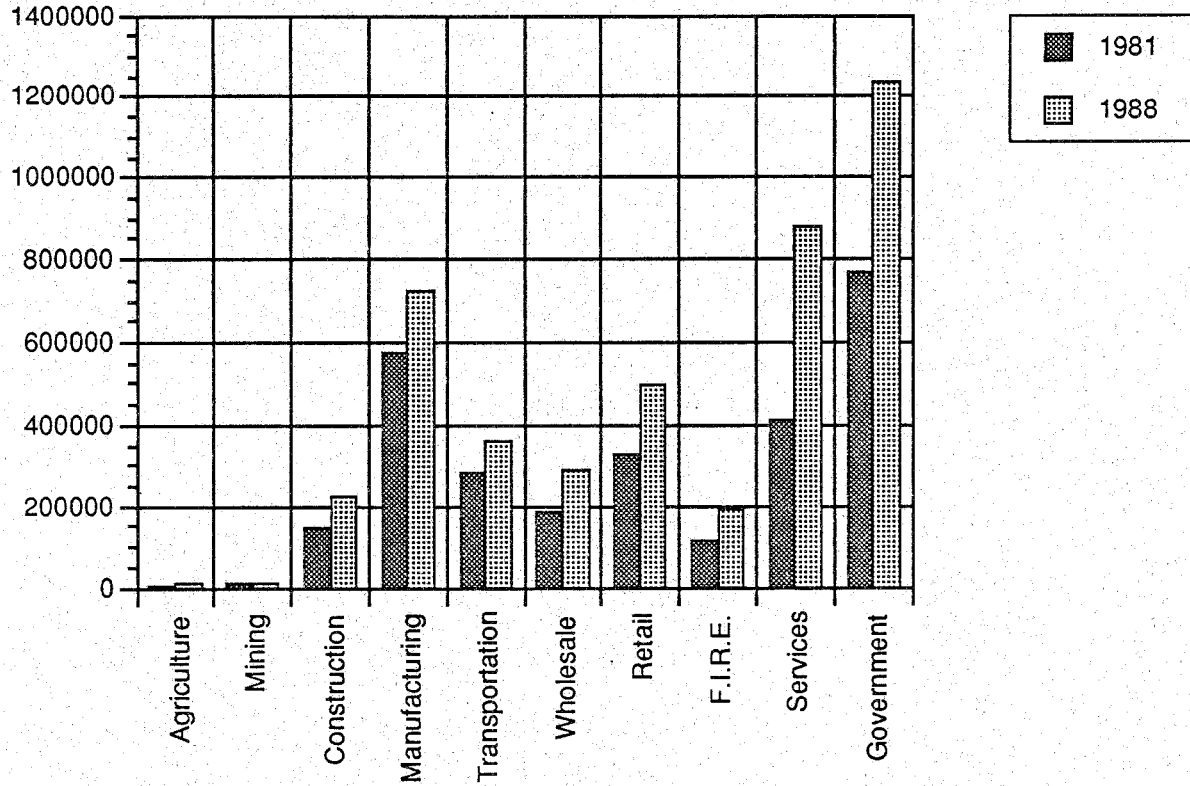
Total Salaries by Industry El Paso 1978-1988



Industry	1978		1988		Growth (%)
	Dollars (000s)	Percent of Total	Dollars (000s)	Percent of Total	
Agriculture	3,295	.2	12,677	.3	284.7
Mining	15,546	.8	10,998	.2	-29.3
Construction	128,121	6.4	222,187	5.0	73.4
Manufacturing	323,595	16.1	720,977	16.3	122.8
Transportation	211,832	10.5	361,518	8.2	70.7
Wholesale	123,796	6.2	289,522	6.5	133.9
Retail	249,244	12.4	497,040	11.2	99.4
F.I.R.E.	96,029	12.4	194,940	4.4	103.0
Services	295,581	14.7	877,668	19.8	196.9
Government	564,434	28.1	1,235,632	27.9	118.9
Total	\$2,011,473	100.0	\$4,423,159	100.0	

Source: U.S. Department of Commerce, Bureau of Economic Analysis

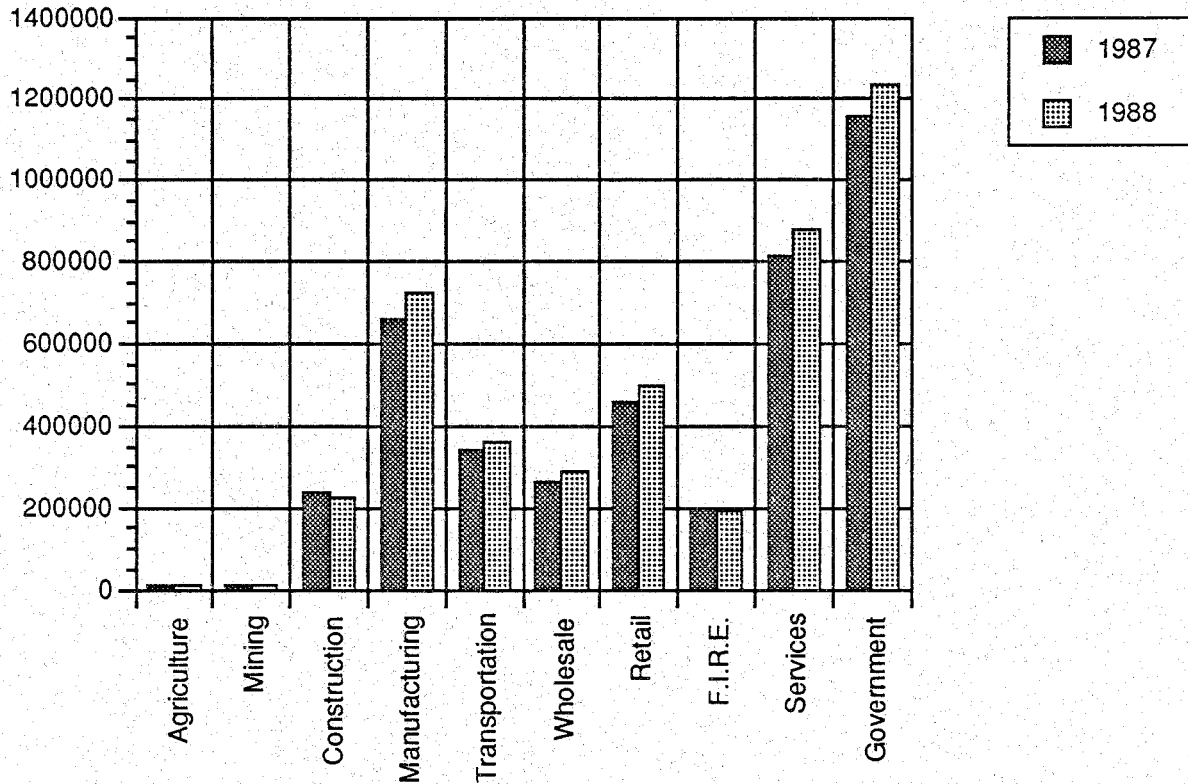
Total Salaries by Industry El Paso 1981-1988



Industry	1981		1988		Growth (%)
	Dollars (000s)	Percent of Total	Dollars (000s)	Percent of Total	
Agriculture	4,344	.2	12,677	.3	191.8
Mining	7,644	.3	10,998	.2	43.9
Construction	143,900	5.1	222,187	5.0	54.4
Manufacturing	571,638	20.3	720,977	16.3	26.1
Transportation	280,471	10.0	361,518	8.2	28.9
Wholesale	183,926	6.5	289,522	6.5	57.4
Retail	329,423	11.7	497,040	11.2	50.9
F.I.R.E.	116,178	11.7	194,940	4.4	67.8
Services	411,248	14.6	877,668	19.8	113.4
Public Admin.					
Other					
Government	767,756	27.3	1,235,632	27.9	60.9
Total	2,816,528	100.0	4,423,159	100.0	57.0

Source: U.S. Department of Commerce, Bureau of Economic Analysis

Total Salaries by Industry El Paso 1987-1988



Industry	1987		1988		Growth (%)
	Dollars (000s)	Percent of Total	Dollars (000s)	Percent of Total	
Agriculture	10,847	.3	12,677	.3	16.9
Mining	11,768	.3	10,998	.2	-6.5
Construction	235,525	5.7	222,187	5.0	-5.7
Manufacturing	656,552	15.8	720,977	16.3	9.8
Transportation	342,131	8.3	361,518	8.2	5.7
Wholesale	261,581	6.3	289,522	6.5	10.7
Retail	457,041	11.0	497,040	11.2	8.8
F.I.R.E.	198,034	11.0	194,940	4.4	-1.6
Services	812,471	19.6	877,668	19.8	8.0
Public Admin. Other					
Government	1,156,583	19.6	1,235,632	19.8	8.0
Total	4,142,533	100.0	4,423,159	100.0	6.8

Source: U.S. Department of Commerce, Bureau of Economic Analysis

EL PASO
POPULATION DISTRIBUTION - 1990

YEARS	WHITE		BLACK		INDIAN		ASIAN		OTHER		TOTAL		HISPANIC	
	MALE	FEMALE	MALE	FEMALE	MALE	FEMALE	MALE	FEMALE	MALE	FEMALE	MALE	FEMALE	MALE	FEMALE
Under 1	3,708	3,458	218	205	27	18	32	30	984	965	4,969	4,676	3,779	3,599
1 and 2	8,343	7,714	527	500	40	47	78	89	2,297	2,243	11,285	10,593	8,605	8,069
3 and 4	8,032	7,672	474	463	49	44	91	87	2,347	2,259	10,993	10,525	8,409	8,069
5	4,215	3,972	249	205	31	20	46	34	1,124	1,111	5,665	5,342	4,344	4,172
6	4,049	3,971	203	221	34	19	51	36	1,181	1,023	5,518	5,270	4,204	4,040
7 to 9	12,173	11,720	662	628	62	62	143	137	3,437	3,213	16,477	15,760	12,662	12,238
10 and 11	8,031	7,724	394	359	53	53	98	111	2,099	2,113	10,675	10,360	8,299	8,138
12 and 13	7,999	7,830	295	299	46	53	88	109	2,077	1,981	10,505	10,272	8,193	8,067
14	4,036	3,783	147	153	29	22	46	57	1,098	1,121	5,356	5,136	4,294	4,070
15	4,172	4,082	175	134	18	21	38	57	1,198	1,165	5,601	5,459	4,503	4,358
16	4,225	4,045	154	143	28	24	46	55	1,182	1,208	5,635	5,475	4,518	4,422
17	4,257	4,128	151	155	24	17	46	61	1,187	1,239	5,665	5,600	4,534	4,503
18	4,203	4,079	258	139	31	22	44	47	1,127	1,285	5,663	5,572	4,247	4,461
19	4,214	4,030	355	195	34	24	86	41	1,179	1,194	5,868	5,484	4,046	4,228
20	4,085	3,752	376	192	47	25	49	37	1,053	1,224	5,610	5,230	3,745	4,008
21	3,782	3,531	381	213	28	15	59	50	925	1,160	5,175	4,969	3,363	3,775
22 to 24	10,795	10,110	1,013	633	79	68	206	179	2,779	3,221	14,872	14,211	9,705	10,488
25 to 29	18,387	19,099	1,518	1,099	127	114	283	303	4,848	5,720	25,163	26,335	16,554	18,891
30 to 34	17,816	19,355	1,414	967	128	122	268	404	4,425	5,145	24,051	25,993	15,950	18,553
35 to 39	15,928	17,504	1,002	629	104	93	228	449	3,648	4,302	20,910	22,977	13,646	16,241
40 to 44	13,946	14,821	697	474	94	79	225	396	2,718	3,452	17,680	19,222	10,737	12,956
45 to 49	10,503	11,616	461	346	62	66	120	264	1,927	2,459	13,073	14,751	7,846	9,843
50 to 54	9,017	10,273	375	306	56	39	81	190	1,446	2,086	10,975	12,894	6,499	8,698
55 to 59	8,489	9,590	385	299	38	43	60	217	1,327	1,808	10,299	11,957	5,908	7,800
60 and 61	3,421	3,952	129	94	19	16	23	86	488	733	4,080	4,881	2,293	3,207
62 to 64	4,696	5,907	121	132	16	18	34	99	670	943	5,537	7,099	3,272	4,519
65 to 69	7,052	8,483	174	156	33	29	30	98	869	1,102	8,158	9,868	4,583	5,635
70 to 74	4,920	5,816	98	102	23	21	32	44	458	686	5,531	6,669	2,645	3,599
75 to 79	3,062	4,639	56	76	9	7	22	25	317	474	3,466	5,221	1,738	2,770
80 to 84	1,726	3,014	27	49	4	5	13	16	186	322	1,956	3,406	1,037	1,840
85 and over	1,039	2,521	20	35	3	8	2	9	127	228	1,191	2,801	725	1,479

	220,321	232,191	12,509	9,601	1,376	1,214	2,668	3,817	50,728	57,185	287,602	304,008	194,883	216,736

EL PASO COMMUNITY PROFILE
Population Projections
City of El Paso, El Paso County: 1990-2010

Planning Area	1990		2000		2010	
	Low	High	Low	High	Low	High
Northeast	88,000	90,000	103,000	106,000	117,000	119,500
Northwest	71,000	73,000	106,500	109,000	144,000	147,000
Central	140,500	141,000	139,500	140,500	139,000	140,000
East	108,500	110,500	135,000	139,000	167,500	171,000
Lower Valley	117,000	120,500	140,000	143,500	169,000	172,000
Hueco	0	0	6,000	7,000	8,500	10,500
City Total	525,000	535,000	630,000	645,000	745,000	760,000
County Total	600,000	610,000	740,000	760,000	930,000	950,000

Source: City of El Paso Department of Planning Research and Development, Demography Section

Community Profile Per Capita Income Comparisons El Paso-Texas

Year	Total Personal Income	El Paso Per Capita Income	Texas Per Capita Income	El Paso's Percentage Difference
1975	1,826,267,000	4,274	5,473	-21.9
1976	2,051,370,000	4,659	6,070	-23.2
1977	2,248,629,000	4,997	6,708	-25.5
1978	2,508,708,000	5,446	7,486	-27.3
1979	2,858,111,000	6,051	8,478	-28.6
1980	3,184,063,000	6,603	9,439	-30.0
1981	3,674,899,000	7,413	10,807	-31.4
1982	3,927,768,000	7,656	11,400	-32.8
1983	4,274,939,000	8,091	11,944	-32.3
1984	4,616,376,000	8,580	12,781	-32.9
1985	4,922,692,000	8,962	13,472	-33.5
1986	5,148,296,000	9,192	13,489	-31.9
1987	5,475,457,000	9,541	13,843	-31.1
1988	5,863,775,000	10,008	14,590	-31.4
1989	6,154,220,000	10,372	15,962	-35.0
1990	6,473,950,000	10,778	16,702	-35.5

Note: 1988-1990 are projections.

Source: U.S. Department of Commerce, Bureau of Economic Analysis

El Paso Economic Indicators

	1988-1989	1989-1990
Retail Trade		
Cash Receipts	\$3,653,344,000	\$3,732,468,000
Employment	50,968	52,442
Transportation		
Cash Receipts	\$400,886	\$409,639
Employment	9,611	9,776
Registrations	359,828	359,484
Border Crossings Vehicles and Pedestrians	22,479,746	15,827,704
Agriculture		
Cash Receipts	\$9,448,000	\$11,851,000
Employment	1,783	1,941
Services		
Cash Receipts	\$539,375	\$668,280
Employment	38,676	41,053
Bank Deposits	\$3,200,564,000	\$2,970,875,300
Demographics		
Population	595,360	591,610
Number of Households	170,000	178,366
Per Capita Income	\$10,372	\$10,778
Labor Force	242,100	250,793

Source: Texas Employment Commission, Texas Comptroller of Public Accounts, Federal Reserve, Texas Department of Highways and Public Transportation

1990 El Paso Projected Sales by Two Digit SIC Code

Agriculture		
07	Agricultural Services	8,028,416
Construction		
15	General Building Contractors	108,662,770
16	Heavy Construction, Ex. Building	4,795,746
17	Special, Trade Contractors	110,430,674
Manufacturing		
20	Food and Kindred Products	14,871,640
23	Apparel and Other Textile Products	87,749,818
24	Lumber and Wood Products	12,258,660
25	Furniture and Fixtures	6,057,702
27	Printing and Publishing	70,393,618
30	Rubber and Miscellaneous Plastic Products	44,257,626
31	Leather and Leather Products	74,706,990
32	Stone, Clay and Glass Products	20,851,932
33	Primary Metal, Industries	73,713,994
34	Fabricated Metal Products	15,590,876
35	Industrial Machinery and Equipment	33,359,768
36	Electronic and Other Electric Equipment	58,203,972
37	Transportation Equipment	17,432,190
39	Miscellaneous Manufacturing Industries	64,824,726
Transportation		
42	Trucking and Warehousing	3,577,762
48	Communications	14,021,628
49	Electric, Gas, and Sanitary Services	11,638,354
Wholesale		
50	Wholesale Trade: Durable Goods	913,691,912
51	Wholesale Trade: Non-Durable Goods	927,393,608
Retail		
52	Building Materials and Garden Supplies	220,217,012
53	General Merchandise Stores	493,404,062
54	Food Stores	788,941,768
55	Automotive Dealers and Service Stations	735,535,956
56	Apparel and Accessory Stores	293,366,302
57	Furniture and Home Furnishing Stores	241,308,180
58	Eating and Drinking Places	333,834,886
59	Miscellaneous Retail	383,671,472
F.I.R.E.		
60	Depository Institutions	148,368
61	Non-depository Institutions	14,008
63	Insurance Carriers	2,697,106
64	Insurance Agents, Brokers and Service	3,005,082
65	Real Estate	1,818,652
Services		
70	Hotels and Other Lodging Places	12,524,638
72	Personal Services	49,070,804
73	Business Services	161,112,994
75	Auto Repair, Services and Parking	68,334,862
76	Miscellaneous Repair Services	47,102,978
78	Motion Pictures	16,213,014
79	Amusement and Recreation Services	22,465,686
80	Health Services	149,477,678
82	Educational Services	583,014
86	Membership Organizations	5,077,890
87	Engineering and Management Services	10,287,840
89	Services, NEC	2,189,684

Source: Texas Comptroller of Public Accounts, IM³ Borderbase

Juarez Profile

No study of the Paso del Norte trade area would be complete without a comprehensive look at El Paso's sister city, Juarez. Together, El Paso and Juarez make up a single binational, bicultural metroplex, more effectively identified as an interplex. True, there are other twin cities scattered along the U.S.-Mexico border, but none of these metropolitan areas is as dynamic or diversified as the El Paso-Juarez international trade area.

The largest city in Mexico's largest state, Juarez, remains ever mindful that this "interplex" exists even though it is politically and physically divided. Juarez can be credited with taking the lead in the recent economic development of this metropolitan area by aggressively promoting Mexico's Border Industrialization Program (BIP). The maquila concept, otherwise called the twin plant or in-bond program, is nowhere more successful than in the El Paso-Juarez interplex. While El Paso provides the industrial service support and trained technicians for the plants, Juarez offers plants, facilities, labor and management services.

Juarez maquilas have expanded 45.6 percent in the past ten years, and it is estimated that between \$6 and \$10 billion of manufactured goods move between these two cities annually. The maquila labor force has doubled since 1982, and it has become more technologically sophisticated. The maquilas of Juarez are moving in the direction of high-tech, capital intensive industries, shifting their labor-intensive processes to such interior cities as Delicias, Camargo, Casas Grandes, Chihuahua City and Parral.

Other positive effects of the maquilas upon the region's economic growth can be generalized from the following data:

- Juarez has one of the highest concentrations of maquiladoras on the U.S.-Mexico border with more than 250 plants in operation. These plants employ more than 141,000 workers.
- Juarez maquiladoras account for approximately 50 percent of the economic impact of manufacturing growth on the U.S. economy.
- More than 500 families have relocated to the Paso del Norte region as the result of transfers to the maquilas.
- Approximately 1,300 experienced professional and highly skilled technical people travel to Juarez from El Paso every day to work in the maquilas.
- One in every five new jobs in El Paso is directly related to the maquiladoras in Juarez.

- Each 10 percent increase in BIP employment results in a 2 to 3 percent increase in employment for El Paso due to the development of service industries that support maquila operations, such as transportation, communications, construction, customs brokerage and warehousing.
- Each 10 percent increase in BIP employment increases sales in El Paso by 11 percent due to the purchases of support materials and services.

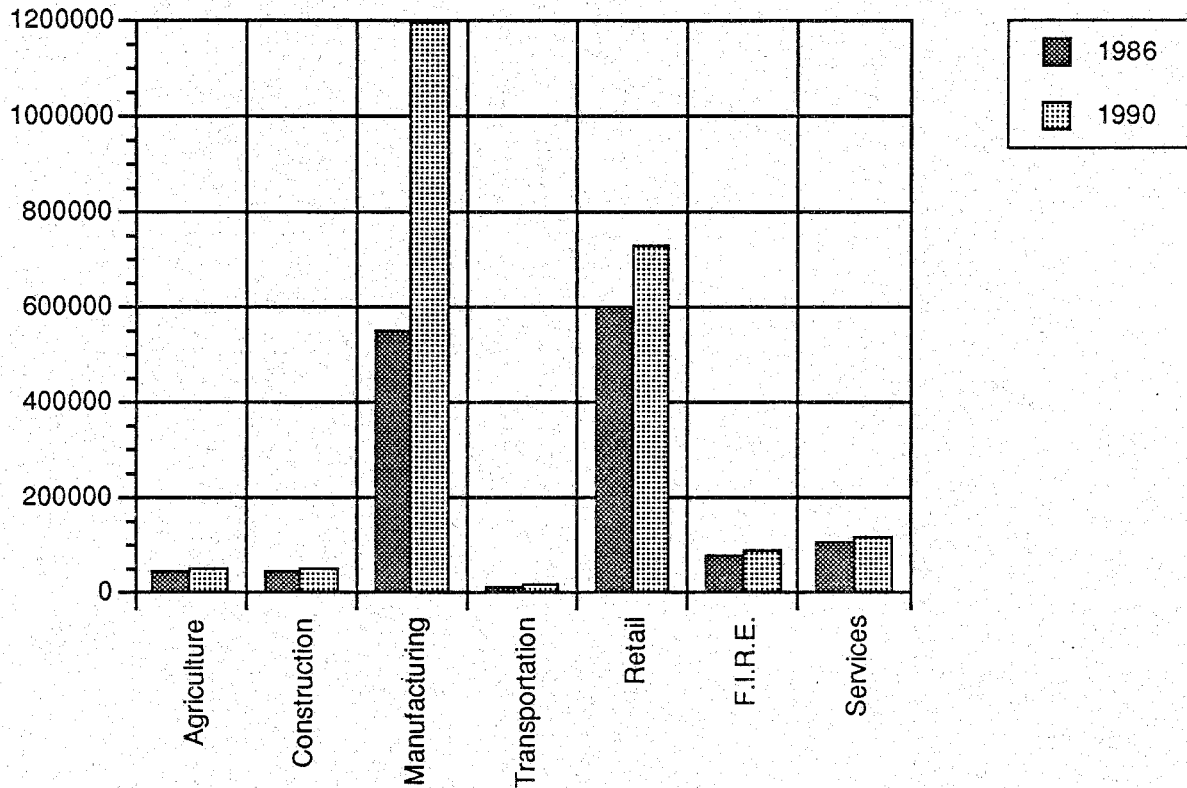
Summary

While definitive socioeconomic data for Juarez are sketchy when compared with the statistics available for Las Cruces and El Paso, certain facts are readily ascertainable and relevant.

1. The 1990 census puts the population of Juarez at 797,679 and Chihuahua at 2,439,954.
2. About 31 percent of the population is under the age of 15, and 6.8 percent are over the age of 60 in Chihuahua.
3. A 1988 study estimated that only 35 percent of the population is economically active. This compared to 46 percent for the United States.
4. While manufacturing-related jobs and industries account for 62.8 percent of Juarez' GSP, the maquila industry employs approximately 41 percent of the economically active population.
5. Although the population of Juarez is predominantly youthful and undereducated by U.S. standards, the employable workforce can be characterized as energetic, industrious, talented and trainable.
6. Generally speaking, this labor force is more productive than its U.S. counterpart.

At any given time, the population, work force and employment figures for Juarez are best described as an educated guess. Juarez' economic indicators cannot be compared with those of the PDN because many of these statistics are not tracked or calculated.

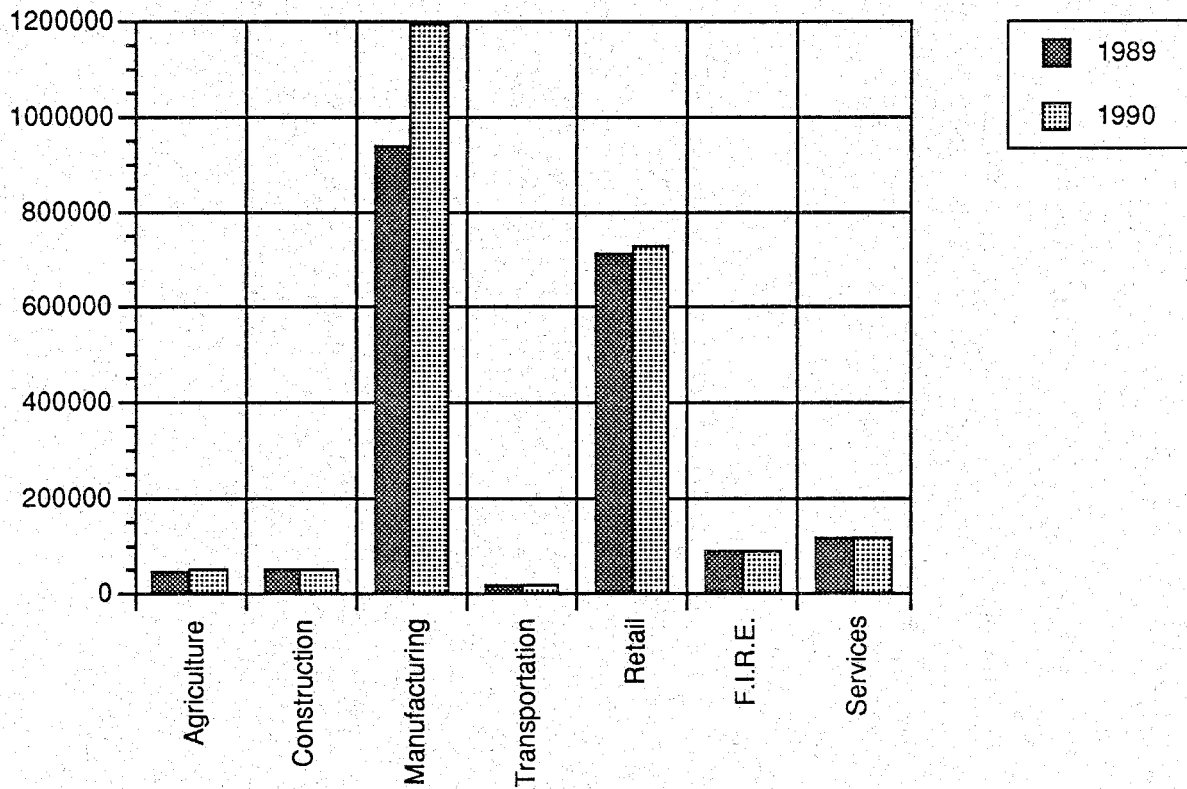
Gross Sector Product Juarez 1986-1990



Industry	1986		1990		Growth (%)
	Dollars (000s)	Percent of Total	Dollars (000s)	Percent of Total	
Agriculture	45,000	3.2	45,470	2.0	1.0
Mining					
Construction	42,700	3.0	49,610	2.2	16.2
Manufacturing	545,700	38.4	1,194,160	53.5	118.8
Transportation	11,700	.8	13,680	.6	16.9
Wholesale					
Retail	599,800	42.3	726,480	32.5	21.1
F.I.R.E.	73,700	5.2	86,550	3.9	17.4
Services	100,800	7.1	116,760	5.2	15.8
Public Admin.					
Other					
Government					
Total	1,419,400	100.0	2,232,710	100.0	57.3

Source: Desarrollo Economico del Estado de Chihuahua, A.C.

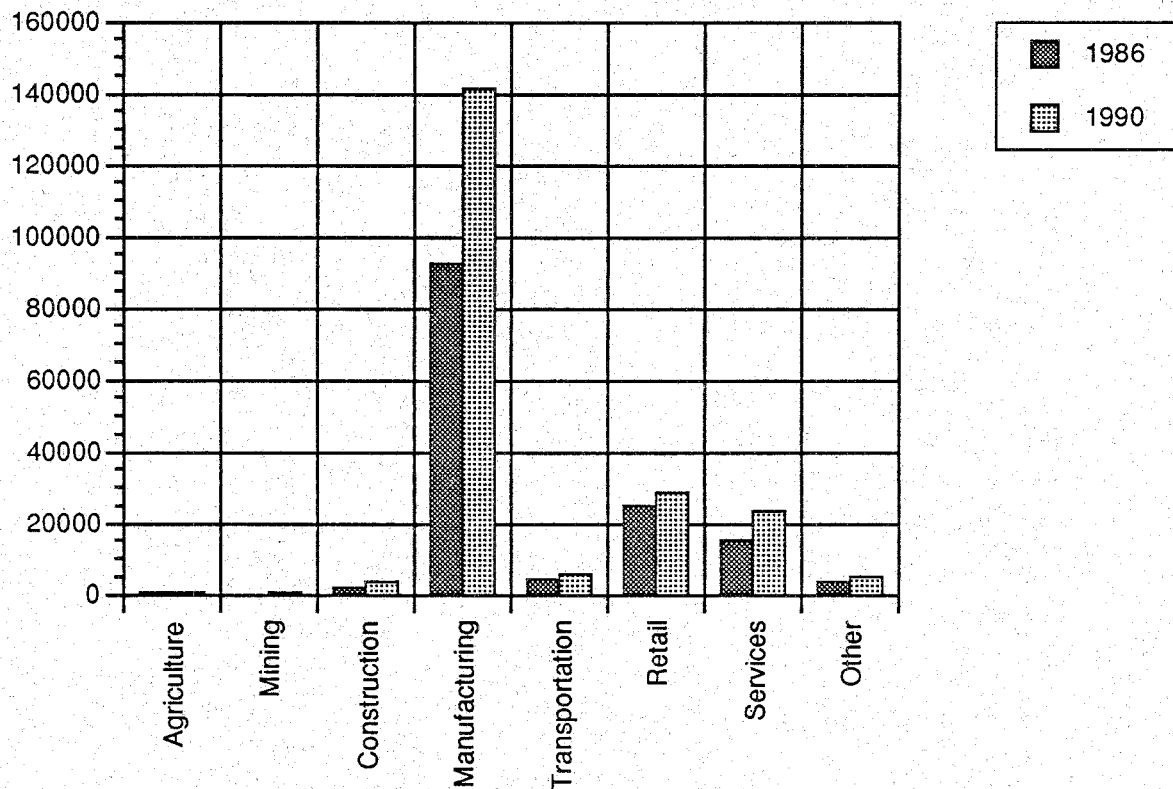
Gross Sector Product Juarez 1989-1990



Industry	1989		1990		Growth (%)
	Dollars (000s)	Percent of Total	Dollars (000s)	Percent of Total	
Agriculture	45,020	2.3	45,470	2.0	1.0
Mining					
Construction	46,200	2.4	49,610	2.2	7.4
Manufacturing	936,600	48.0	1,194,160	53.5	27.5
Transportation	13,060	.7	13,680	.6	4.7
Wholesale					
Retail	709,460	36.4	726,480	32.5	2.4
F.I.R.E.	84,520	4.3	86,550	3.9	2.4
Services	115,830	5.9	116,760	5.2	.8
Public Admin.					
Other Government					
Total	1,950,690	100.0	2,232,710	100.0	14.5

Source: Desarrollo Economico del Estado de Chihuahua, A.C.

Employment by Industry Juarez 1986-1990



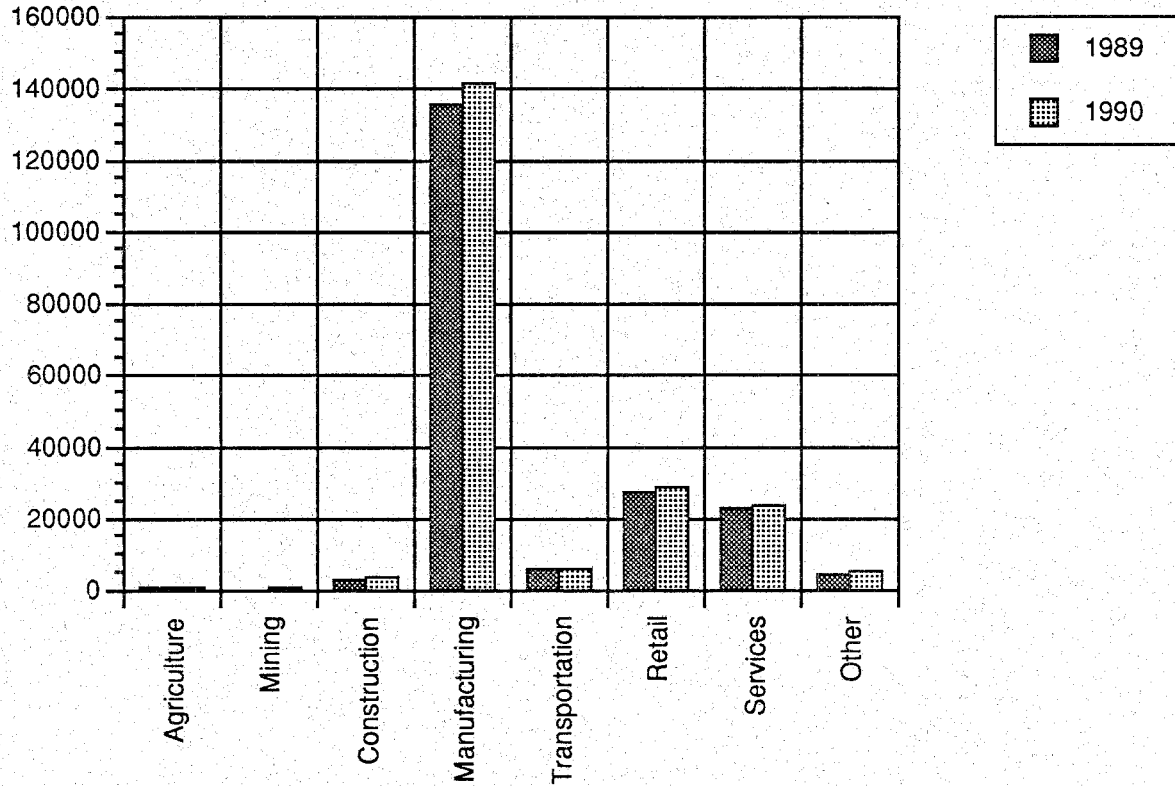
Industry	1986		1990		Growth (%)
	Employment	Percent of Total	Employment	Percent of Total	
Agriculture	776	.5	358	.2	-53.8
Mining	55	.0	94	.0	69.6
Construction	1,763	1.2	3,283	1.6	86.2
Manufacturing	92,196	64.6	141,043	68.3	53.0
Transportation	4,218	3.0	5,424	2.6	28.6
Wholesale					
Retail	25,201	17.7	28,506	13.8	13.1
F.I.R.E.					
Services	15,093	10.6	23,180	11.2	53.6
Public Admin.					
Other	3,342	2.3	4,626	2.2	38.4
Government					
Total	142,644	100.0	206,514	100.0	44.8

Note 1: Resale and wholesale data are combined.

Note 2: Blanks represent unavailable data.

Source: Desarrollo Economico del Estado de Chihuahua, A.C.

Employment by Industry Juarez 1989-1990



Industry	1989		1990		Growth (%)
	Employment	Percent of Total	Employment	Percent of Total	
Agriculture	430	.2	358	.2	-16.7
Mining	76	.0	94	.0	23.4
Construction	2,777	1.4	3,283	1.6	18.2
Manufacturing	135,006	68.2	141,043	68.3	4.5
Transportation	5,287	2.7	5,424	2.6	2.6
Wholesale					
Retail	27,338	13.8	28,506	13.8	4.3
F.I.R.E.					
Services	22,622	11.4	23,180	11.2	2.5
Public Admin.					
Other	4,410	2.2	4,626	2.2	4.9
Government					
Total	197,946	100.0	206,514	100.0	4.3

Note 1: Resale and wholesale data are combined.

Note 2: Blanks represent unavailable data.

Source: Desarrollo Economico del Estado de Chihuahua, A.C.

Las Cruces/Dona Ana Profile

The Las Cruces/Dona Ana SMSA is a study in contrasts. Located 45 miles north of El Paso and Juarez, Las Cruces is a city with a population of 76,117, situated in a river valley with a population of 135,510. This fertile valley along the Rio Grande was once a resting place for oxcart caravans traversing the Camino Real, but today this region is a landing site for space shuttles.

Tractors and missiles play important roles in the economic development of the Dona Ana SMSA. Not only is the Mesilla Valley the home of the world's largest pecan producer, Stahmann Farms, it is also the birthplace of America's space and missile activity. The remote regions of the White Sands Missile Range, once the stronghold of the Apache Chief Geronimo, today rank as the largest overland missile test facility in the United States.

Situated on the edge of a vast frontier, Las Cruces is the second largest city in New Mexico and a vital link to rapidly expanding Southwestern markets. From its rich and colorful heritage, the Las Cruces/Dona Ana County SMSA has developed into a contemporary community sitting on the forefront of still greater frontiers - - those of the new technologies of aerospace, weapons development and telecommunications. The cultural, geographic and economic diversity of the Dona Ana SMSA can be illustrated by the following socioeconomic data:

- **Population:** Records for 1990 list the SMSA population at 135,510. The growth rate for Dona Ana between 1970 and 1980 was 38.1 percent and between 1980 and 1990 was 40.1 percent. This exceeded the growth rate of all other New Mexico cities. The growth rate for the state between 1970 and 1980 was 28.2 percent and between 1980 and 1990 was 16.3 percent.
- **Migration:** One reason for the SMSA's population growth is increased migration. From 1980 to 1984 the Dona Ana SMSA increased by 18,000 people. Of this number, 11,800 were considered immigrants for a net increase of 12.2 percent. This is the highest figure recorded in the state, more than double the 3.6 percent recorded by Albuquerque.
- **Ethnicity and Age Distribution:** The Dona Ana SMSA resembles its neighbor, El Paso, in ethnicity. The Hispanic population is 56.4 percent of the total, which is higher than the statewide percentage of 38.2 percent. Of this Spanish population, the median age is 20.8 years for females and 24.7 years for males. The Las Cruces SMSA has a youthful population with 30.4 percent of the population less than 18 years old.
- **Household and Economic Factors:** In 1990 there were 49,148 households in the Dona Ana SMSA with an average family size of 2.76 (1990) people per household. The median effective buying income is approximately \$17,214, and

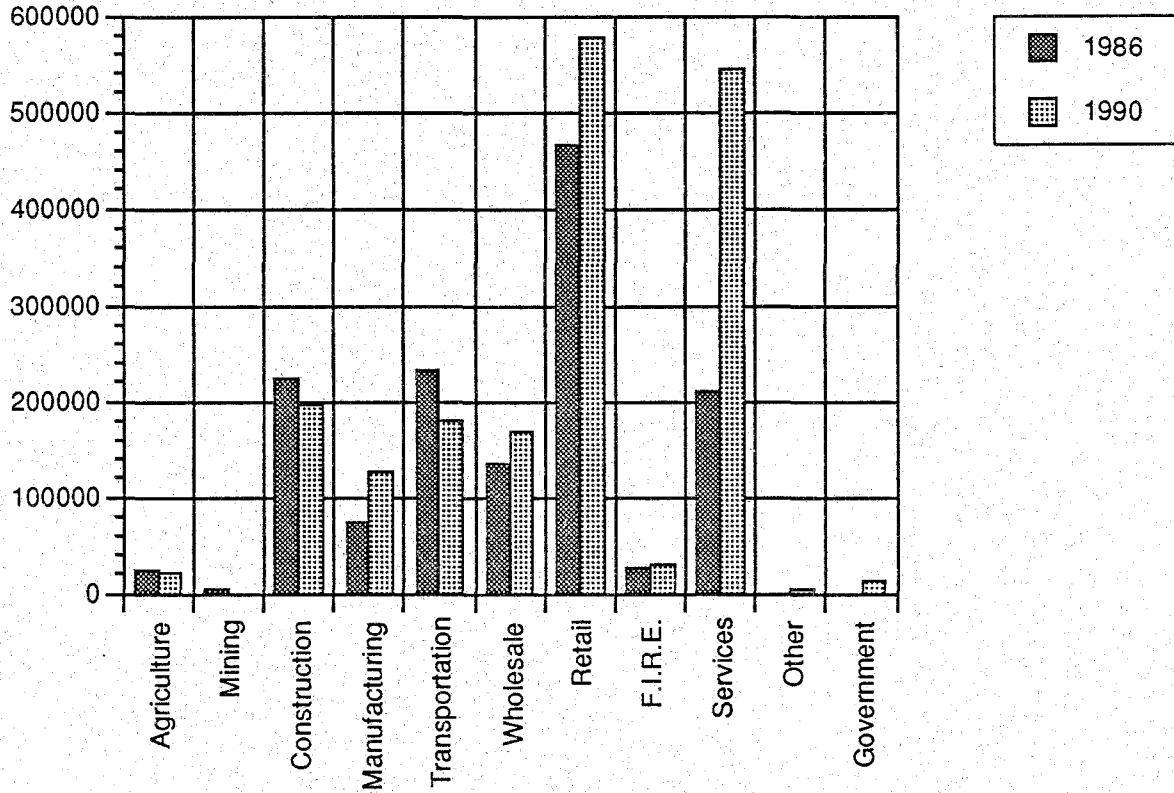
currently available figures indicate that 18.3 percent of the population falls below the poverty level. These figures indicate that this area, with an unemployment rate around 8.5 percent, is less prosperous than the statewide population on the whole.

- **Labor:** The employed civilian labor force of the Dona Ana SMSA totals 59,168. Of that figure 44,000 people are employed in non-agricultural industries. More than 30.8 percent of these jobs are generated by the government, making it the single largest employer in the area.

Summary

The Las Cruces/Dona Ana population is expanding rapidly and consists of predominantly youthful, Hispanic, economically disadvantaged citizens. The circumstance that distinguishes this area from its neighbor, El Paso, is the abundant water supply that is readily accessible. This alone could contribute to significant, continued growth for the Las Cruces/Dona Ana SMSA.

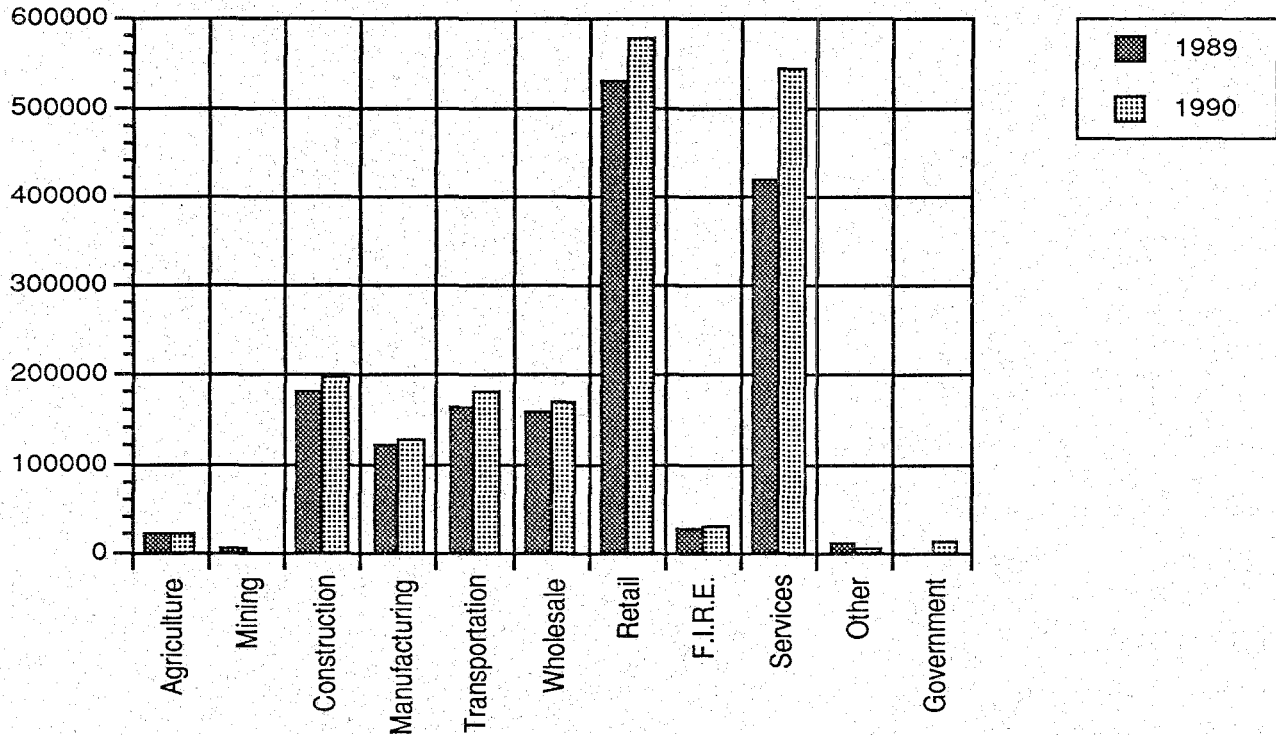
Gross Sector Product Dona Ana 1986-1990



Industry	1986		1990		Growth (%)
	Dollars (000s)	Percent of Total	Dollars (000s)	Percent of Total	
Agriculture	24,981	1.8	22,449	1.2	-10.1
Mining	3,631	.3			-100.0
Construction	224,865	16.1	196,102	10.5	-12.8
Manufacturing	72,888	5.2	125,578	6.8	72.3
Transportation	231,094	16.6	180,052	9.7	-22.1
Wholesale	134,349	9.6	167,427	9.0	24.6
Retail	465,389	33.4	577,996	31.1	24.2
F.I.R.E.	26,078	1.9	29,994	1.6	15.0
Services	210,618	15.1	543,947	29.2	158.3
Public Admin.					
Other			4,130	.2	
Government			12,172	.7	
Total	1,393,892	100.0	1,859,847	100.0	33.4

Source: U.S. Department of Commerce, Bureau of Economic Analysis

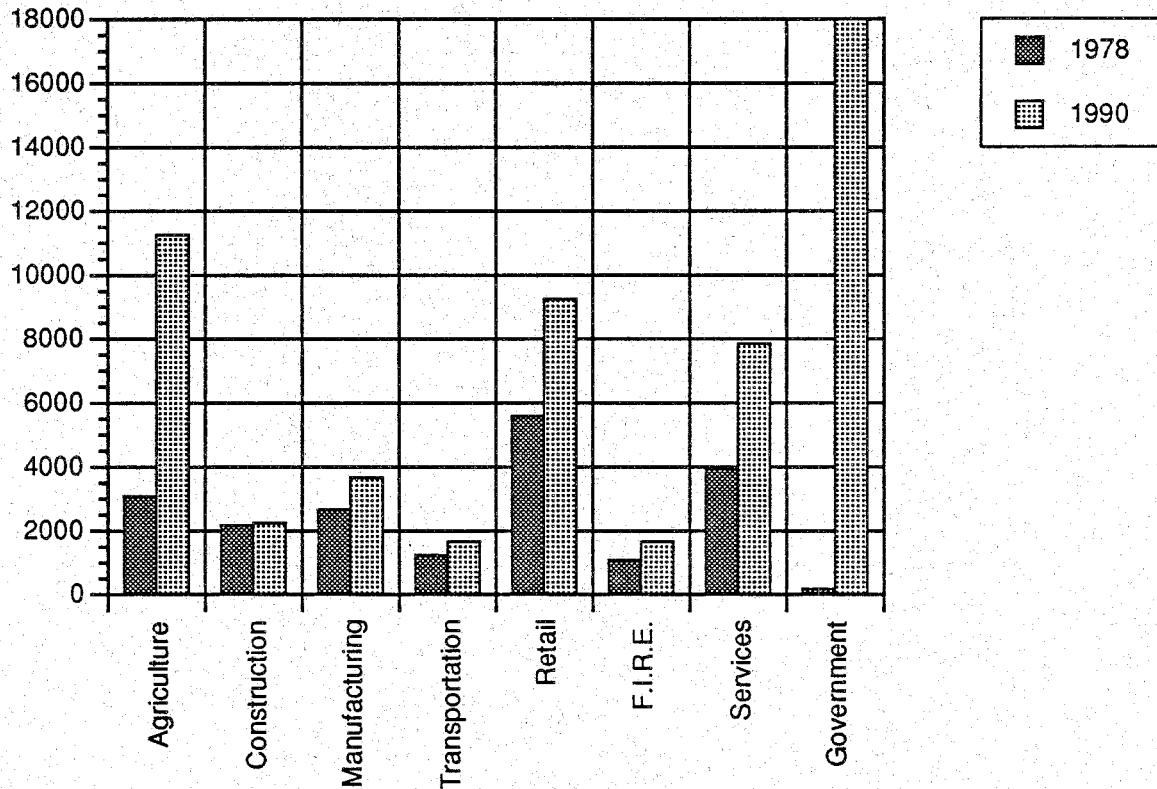
Gross Sector Product Dona Ana 1989-1990



Industry	1989 (000s)	Percent of Total	1990 (000s)	Percent of Total	Growth (%)
Agriculture	21,880	1.3	22,449	1.2	2.6
Mining	4,417	.3	---	---	---
Construction	180,169	11.0	196,102	10.5	8.8
Manufacturing	121,187	7.4	125,578	6.8	3.6
Transportation	161,680	9.9	180,052	9.7	11.4
Wholesale	157,290	9.6	167,427	9.0	6.4
Retail	529,351	32.4	577,996	31.1	9.2
F.I.R.E.	27,164	1.7	29,994	1.6	10.4
Services	419,087	25.7	543,947	29.2	29.8
Public Admin.	---	---	---	---	---
Other	11,318	.7	4,130	.2	-63.5
Government	---	---	12,172	.7	---
Total	\$1,633,545	100.0	\$1,859,847	100.0	13.9

Source: Taxation and Revenue Department, New Mexico; Bureau of Business and Economic Research, University of New Mexico

Employment by Industry Dona Ana 1978-1990



Industry	1978		1990		Growth (%)
	Employment	Percent of Total	Employment	Percent of Total	
Agriculture	3,090	15.7	11,207	20.3	262.6
Mining					
Construction	2,100	10.7	2,200	4.0	4.8
Manufacturing	2,625	13.3	3,600	6.5	37.1
Transportation	1,200	6.1	1,600	2.9	33.3
Wholesale					
Retail	5,550	28.2	9,200	16.7	65.8
F.I.R.E.	1,050	5.3	1,600	2.9	52.3
Services	3,925	20.0	7,800	14.1	98.7
Public Admin.					
Other					
Government	124	.6	18,000	32.6	
Total	19,664	100.0	55,207	100.0	180.7

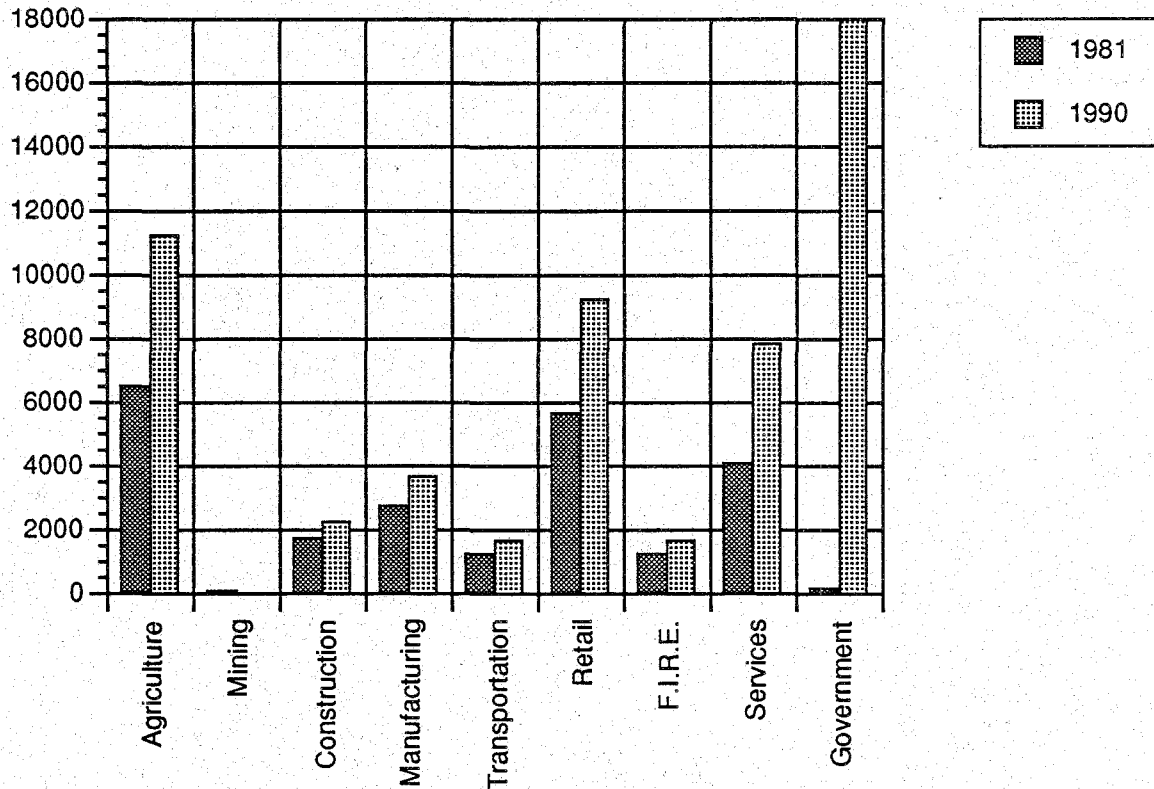
Note 1: Retail and wholesale figures are combined.

Note 2: Blanks indicate unavailable data.

Note 3: Government employees may be included in New Mexico's agriculture statistics for some years.

Source: New Mexico Department of Labor, Economic Research and Analysis Division; New Mexico Employment Security Department, Bureau of Economic Research & Analysis; *Migrant and Seasonal Farmworkers in New Mexico Report*, New Mexico Health and Environmental Department

Employment by Industry Dona Ana 1981-1990



Industry	1981		1990		Growth (%)
	Employment	Percent of Total	Employment	Percent of Total	
Agriculture	6,430	27.8	11,207	20.3	74.3
Mining	25	.1			-96.2
Construction	1,725	7.5	2,200	4.0	27.5
Manufacturing	2,750	11.9	3,600	6.5	30.9
Transportation	1,200	5.2	1,600	2.9	33.3
Wholesale					
Retail	5,600	24.2	9,200	16.7	64.3
F.I.R.E.	1,225	5.3	1,600	2.9	30.6
Services	4,050	17.5	7,800	14.1	92.6
Public Admin.					
Other					
Government	135	.6	18,000	32.6	
Total	23,140	100.0	55,207	100.0	138.6

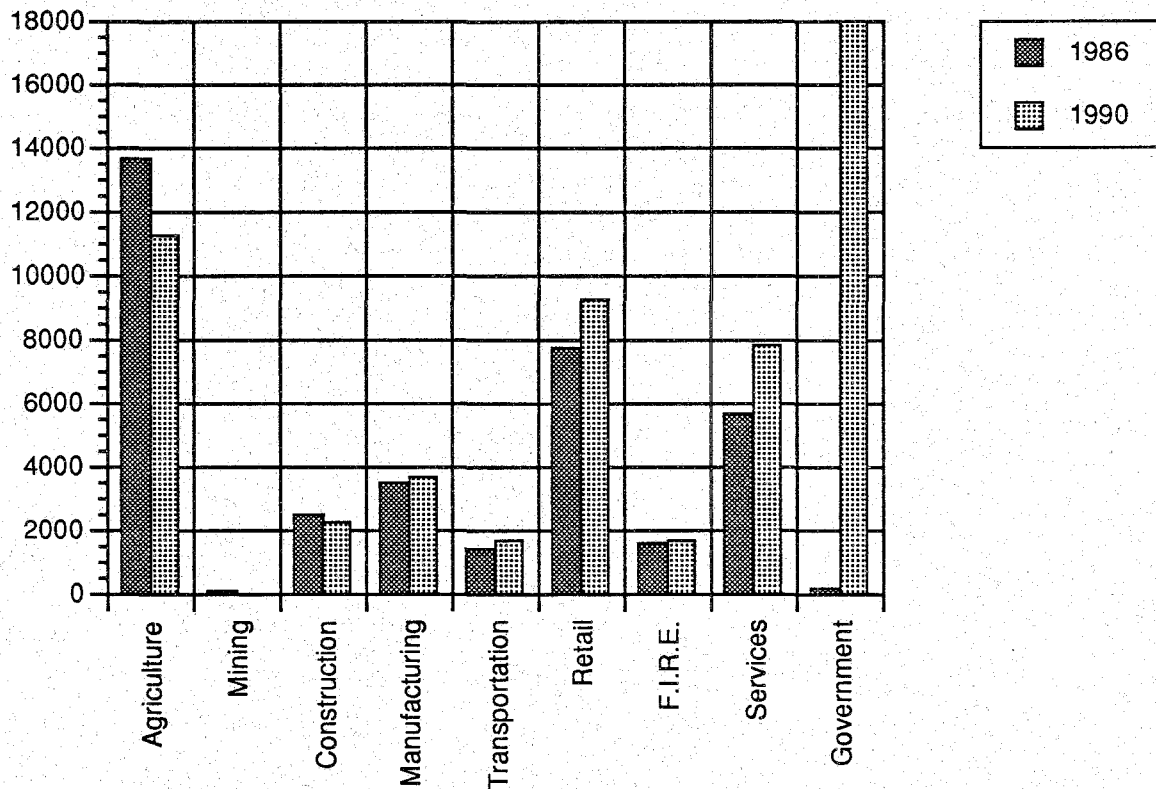
Note 1: Retail and wholesale figures are combined.

Note 2: Blanks indicate unavailable data.

Note 3: Government employees may be included in New Mexico's agriculture statistics for some years.

Source: New Mexico Department of Labor, Economic Research and Analysis Division; New Mexico Employment Security Department, Bureau of Economic Research & Analysis; *Migrant and Seasonal Farmworkers in New Mexico Report*, New Mexico Health and Environmental Department

Employment by Industry Dona Ana 1986-1990



Industry	1986		1990		Growth (%)
	Employment	Percent of Total	Employment	Percent of Total	
Agriculture	13,613	37.8	11,207	20.3	-17.7
Mining	50	.1			-98.0
Construction	2,500	6.9	2,200	4.0	-12.0
Manufacturing	3,500	9.7	3,600	6.5	2.9
Transportation	1,350	3.7	1,600	2.9	18.5
Wholesale					
Retail	7,700	21.4	9,200	16.7	19.5
F.I.R.E.	1,550	4.3	1,600	2.9	3.2
Services	5,600	15.5	7,800	14.1	39.3
Public Admin.					
Other					
Government	156	.4	18,000	32.6	
Total	36,109	100.0	55,207	100.0	53.3

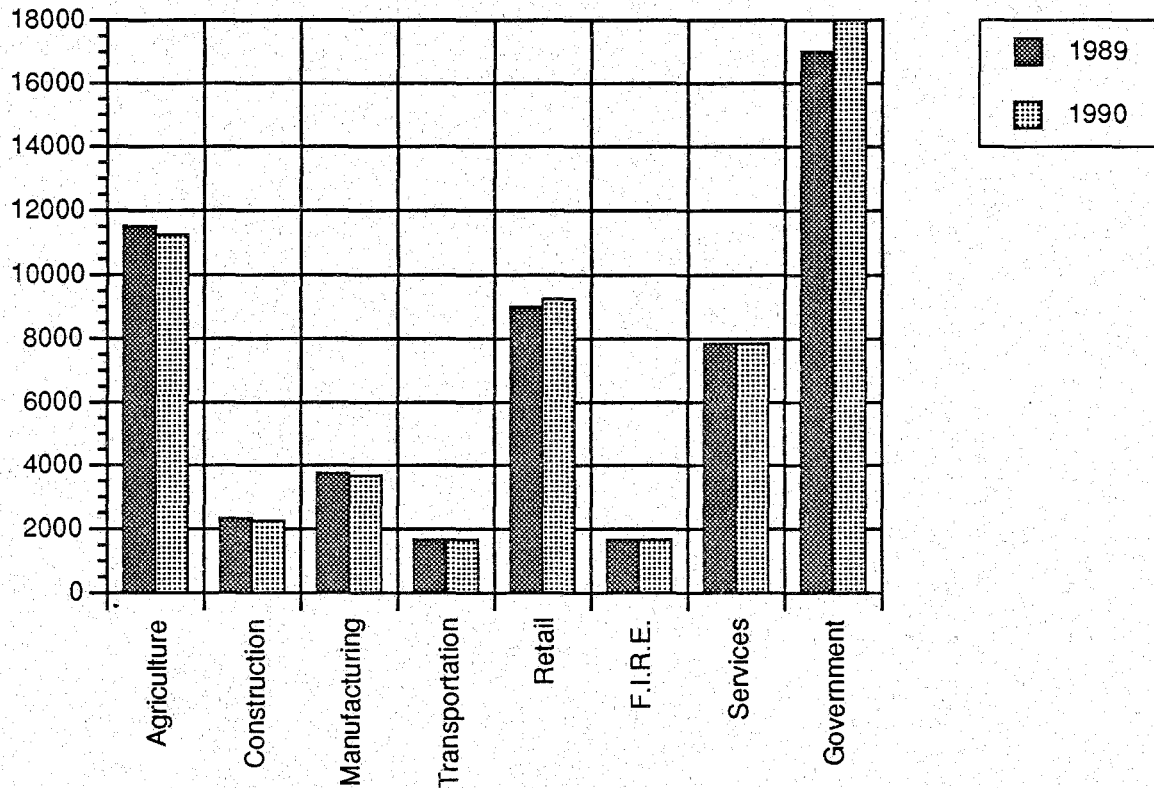
Note 1: Retail and wholesale figures are combined.

Note 2: Blanks indicate unavailable data.

Note 3: Government employees may be included in New Mexico's agriculture statistics for some years.

Source: New Mexico Department of Labor, Economic Research and Analysis Division; New Mexico Employment Security Department, Bureau of Economic Research & Analysis; *Migrant and Seasonal Farmworkers in New Mexico Report*, New Mexico Health and Environmental Department

Employment by Industry Dona Ana 1989-1990



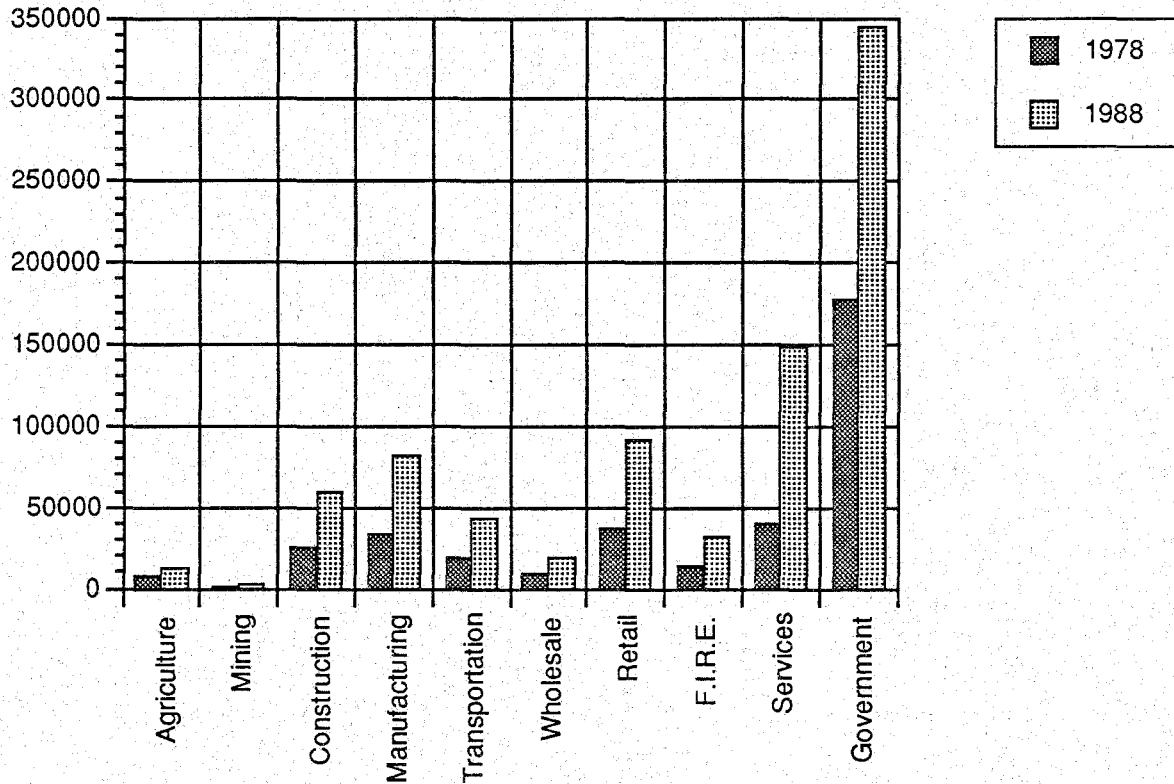
Industry	1989		1990		Growth (%)
	Employment	Percent of Total	Employment	Percent of Total	
Agriculture	11,506	21.1	11,207	20.3	-2.6
Mining	.				
Construction	2,300	4.2	2,200	4.0	-4.3
Manufacturing	3,700	6.8	3,600	6.5	-2.7
Transportation	1,600	2.9	1,600	2.9	.0
Wholesale					
Retail	9,000	16.5	9,200	16.7	2.2
F.I.R.E.	1,600	2.9	1,600	2.9	.0
Services	7,800	14.3	7,800	14.1	.0
Public Admin.					
Other					
Government	17,000	31.2	18,000	32.6	5.9
Total	54,506	100.0	55,207	100.0	1.3

Note 1: Resale and wholesale data are combined.

Note 2: Blanks represent unavailable data.

Source: New Mexico Department of Labor, Economic Research and Analysis Division; New Mexico Employment Security Department, Bureau of Economic Research and Analysis; *Migrant and Seasonal Farm Workers in New Mexico Report*, New Mexico Health and Environmental Department

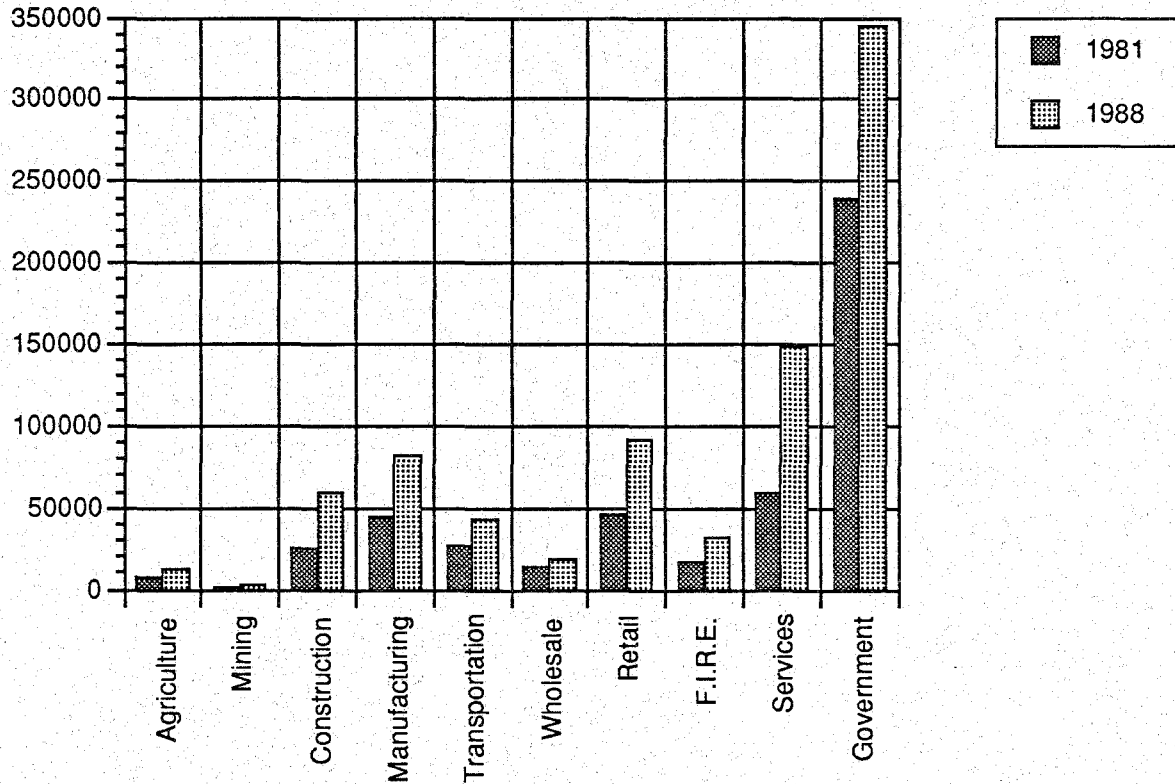
Total Salaries by Industry Dona Ana 1978-1988



Industry	1978		1988		Growth (%)
	Dollars (000s)	Percent of Total	Dollars (000s)	Percent of Total	
Agriculture	6,707	1.8	12,514	1.5	86.6
Mining	218	.1	2,376	.3	989.9
Construction	24,968	6.9	58,729	7.0	135.2
Manufacturing	34,117	9.4	82,307	9.9	141.2
Transportation	18,947	5.2	43,102	5.2	127.5
Wholesale	8,700	2.4	18,297	2.2	110.3
Retail	37,386	10.3	92,339	11.1	147.0
F.I.R.E.	13,925	10.3	31,876	3.8	128.9
Services	40,603	11.2	148,403	17.8	265.5
Government	177,781	48.9	344,729	41.3	93.9
Total	\$363,352	100.0	\$834,672	100.0	

Source: U.S. Department of Commerce, Bureau of Economic Analysis

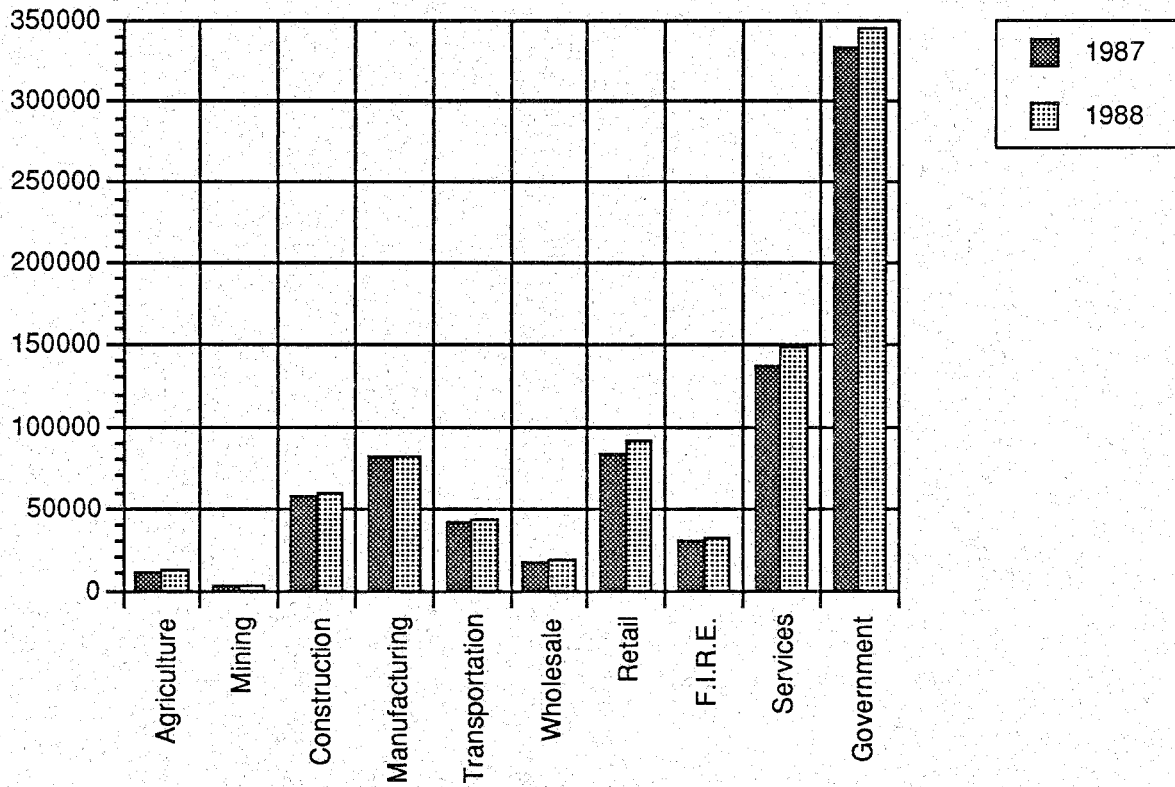
Total Salaries by Industry Dona Ana 1981-1988



Industry	1981		1988		Growth (%)
	Dollars (000s)	Percent of Total	Dollars (000s)	Percent of Total	
Agriculture	8,291	1.7	12,514	1.5	50.9
Mining	567	.1	2,376	.3	318.5
Construction	25,979	5.4	58,729	7.0	126.1
Manufacturing	43,996	9.2	82,307	9.9	87.1
Transportation	26,342	5.5	43,102	5.2	63.6
Wholesale	13,339	2.8	18,297	2.2	37.2
Retail	46,053	9.6	92,339	11.1	100.5
F.I.R.E.	16,426	9.6	31,876	3.8	94.1
Services	59,657	12.4	148,403	17.8	148.8
Public Admin. Other					
Government	239,778	49.9	344,729	41.3	43.8
Total	480,438	100.0	834,672	100.0	73.7

Source: U.S. Department of Commerce, Bureau of Economic Analysis

Total Salaries by Industry Dona Ana 1987-1988



Industry	1987		1988		Growth (%)
	Dollars (000s)	Percent of Total	Dollars (000s)	Percent of Total	
Agriculture	10,915	1.4	12,514	1.5	14.6
Mining	2,305	.3	2,376	.3	3.1
Construction	57,110	7.2	58,729	7.0	2.8
Manufacturing	81,249	10.2	82,307	9.9	1.3
Transportation	40,780	5.1	43,102	5.2	5.7
Wholesale	17,535	2.2	18,297	2.2	4.3
Retail	83,148	10.5	92,339	11.1	11.1
F.I.R.E.	30,931	10.5	31,876	3.8	3.1
Services	136,568	17.2	148,403	17.8	8.7
Public Admin.					
Other					
Government	332,890	42.0	344,729	41.3	3.6
Total	793,431	100.0	834,672	100.0	5.2

Source: U.S. Department of Commerce, Bureau of Economic Analysis

**DONA ANA
POPULATION DISTRIBUTION - 1990**

YEARS	WHITE		BLACK		INDIAN		ASIAN		OTHER		TOTAL		HISPANIC	
	MALE	FEMALE	MALE	FEMALE	MALE	FEMALE	MALE	FEMALE	MALE	FEMALE	MALE	FEMALE	MALE	FEMALE
Under 1	971	927	20	20	4	6	11	7	69	66	1,075	1,026	751	706
1 and 2	2,173	2,174	49	53	19	17	29	17	153	136	2,423	2,397	1,644	1,616
3 and 4	2,214	2,045	46	49	10	21	14	22	169	136	2,453	2,273	1,662	1,541
5	1,135	1,112	26	17	6	8	8	9	88	71	1,263	1,217	882	849
6	1,130	1,009	23	20	8	10	10	6	85	57	1,256	1,102	868	739
7 to 9	3,252	3,212	66	53	25	22	21	26	203	216	3,567	3,529	2,437	2,426
10 and 11	2,092	2,017	48	41	18	17	14	19	150	147	2,322	2,241	1,596	1,504
12 and 13	2,082	1,923	27	37	14	10	17	14	126	150	2,266	2,134	1,566	1,497
14	1,013	968	23	13	7	4	3	13	81	63	1,127	1,061	807	756
15	1,048	940	12	14	6	5	6	6	71	75	1,143	1,040	806	740
16	981	904	15	13	4	9	6	8	69	70	1,075	1,004	780	705
17	972	1,037	22	11	6	8	7	9	56	78	1,063	1,143	719	827
18	1,100	1,233	14	12	10	19	10	9	64	92	1,198	1,365	766	849
19	1,459	1,444	29	26	18	22	6	11	98	112	1,610	1,615	843	861
20	1,483	1,447	41	34	26	22	13	10	95	123	1,658	1,636	839	883
21	1,388	1,322	30	19	15	25	13	6	102	116	1,548	1,488	793	843
22 to 24	3,381	3,224	95	68	38	44	53	36	287	254	3,854	3,626	2,002	2,100
25 to 29	5,411	5,155	154	97	79	41	68	70	353	392	6,065	5,755	3,326	3,453
30 to 34	4,878	5,127	137	76	38	45	78	77	317	356	5,448	5,681	2,965	3,306
35 to 39	4,418	4,475	97	62	34	30	64	71	274	282	4,887	4,920	2,573	2,725
40 to 44	3,739	3,801	65	42	20	20	26	55	199	206	4,049	4,124	1,978	2,173
45 to 49	2,883	3,027	36	22	23	25	24	19	120	142	3,086	3,235	1,447	1,605
50 to 54	2,417	2,573	32	28	16	24	17	27	100	153	2,582	2,805	1,211	1,406
55 to 59	2,445	2,462	30	18	21	11	15	13	99	148	2,610	2,652	1,191	1,311
60 and 61	935	963	11	11	3	6	2	8	52	57	1,003	1,045	473	499
62 to 64	1,280	1,372	21	17	8	7	6	15	75	71	1,390	1,482	647	667
65 to 69	1,972	2,083	15	17	13	10	9	11	93	79	2,102	2,200	883	820
70 to 74	1,406	1,516	14	22	3	6	6	7	42	65	1,471	1,616	501	555
75 to 79	895	1,201	12	12	5	5		1	33	29	945	1,248	307	425
80 to 84	502	746	9	9	2	4	3	1	8	29	524	789	197	261
85 and over	296	644	7	13	4	3	1	1	12	17	320	678	128	212

	61,351	62,083	1,226	946	503	506	560	604	3,743	3,988	67,383	68,127	37,588	38,860

DONA ANA COMMUNITY PROFILE

Population Projections by Age Distribution

	1980	1985	1990	1995	2000
TOTAL	97,200	118,600	143,400	162,000	180,600
Less than 5 years	8,400	10,900	13,500	14,700	15,400
5 - 9	8,400	9,400	11,900	14,100	15,300
10 - 14	8,600	9,800	11,000	12,900	15,000
15 - 19	11,400	11,000	12,500	12,500	14,200
20 - 24	12,200	14,500	14,500	14,400	14,400
25 - 29	8,500	12,600	15,100	14,800	14,700
30 - 34	6,700	7,900	12,000	14,700	14,400
35 - 39	5,300	7,400	8,700	12,400	15,000
40 - 44	4,700	5,800	8,000	8,900	12,700
45 - 49	4,700	5,200	6,300	8,300	9,100
50 - 54	4,300	5,200	5,800	6,600	8,500
55 - 59	3,900	4,900	5,900	6,000	6,900
60 - 64	3,100	4,100	5,200	5,900	6,100
65 - 69	2,600	3,200	4,200	5,100	5,800
70 - 74	1,900	2,700	3,300	4,000	4,800
>75 years	2,600	3,900	5,400	6,700	8,200

Source:: Bureau of Business and Economic Research, The University of New Mexico

Dona Ana Community Profile Per Capita Income Comparisons Dona Ana - El Paso

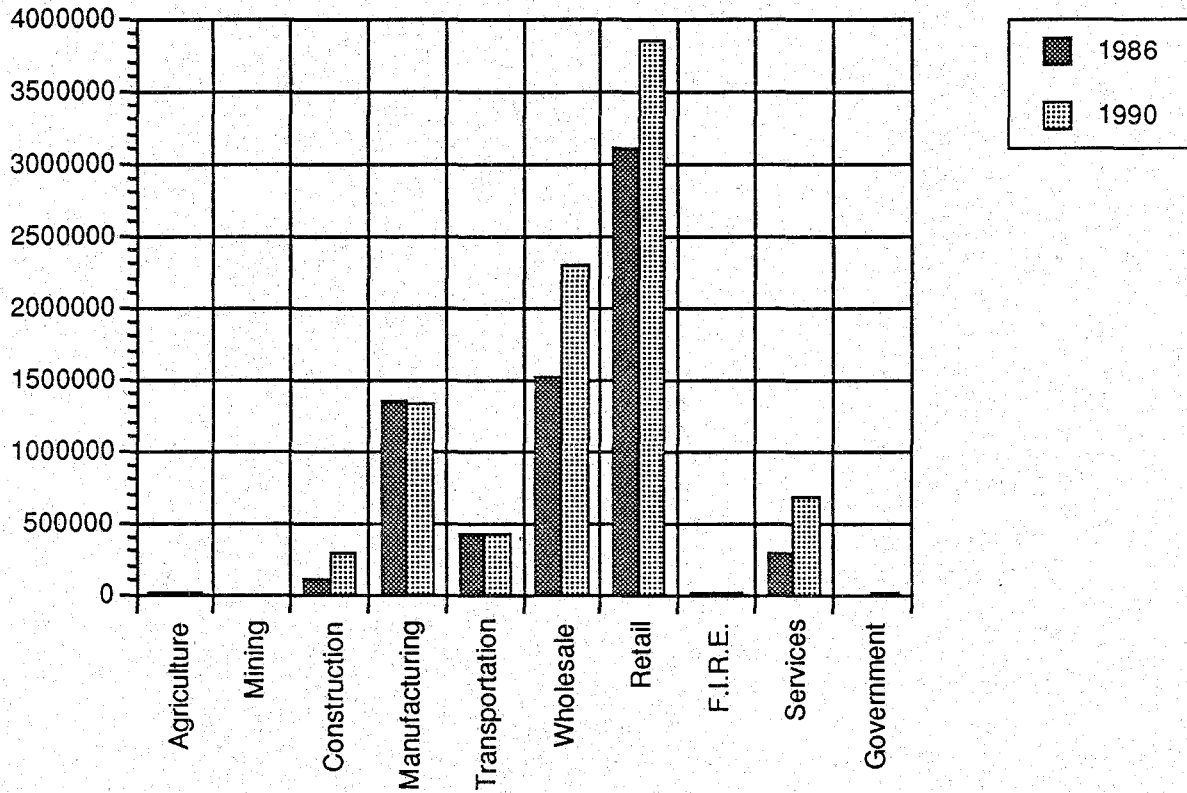
Year	Dona Ana Per Capita Income	El Paso Per Capita Income	Dona Ana's Percentage Difference
1975	4,119	4,274	-3.6
1976	4,642	4,659	-0.4
1977	4,923	4,997	-1.5
1978	5,298	5,446	-2.7
1979	5,813	6,051	-3.9
1980	6,345	6,603	-3.9
1981	7,517	7,413	1.4
1982	7,716	7,656	0.8
1983	8,315	8,091	2.8
1984	8,524	8,580	-0.6
1985	9,051	8,962	1.0
1986	9,209	9,192	0.2
1987	9,567	9,541	0.3
1988	9,791	10,008	-2.2
1989	10,494	10,372	1.2
1990	10,927	10,778	1.4

Note: 1988-1990 are projections.

Source: U.S. Department of Commerce, Bureau of Economic Analysis

West Texas

Gross Sector Product West Texas 1986-1990

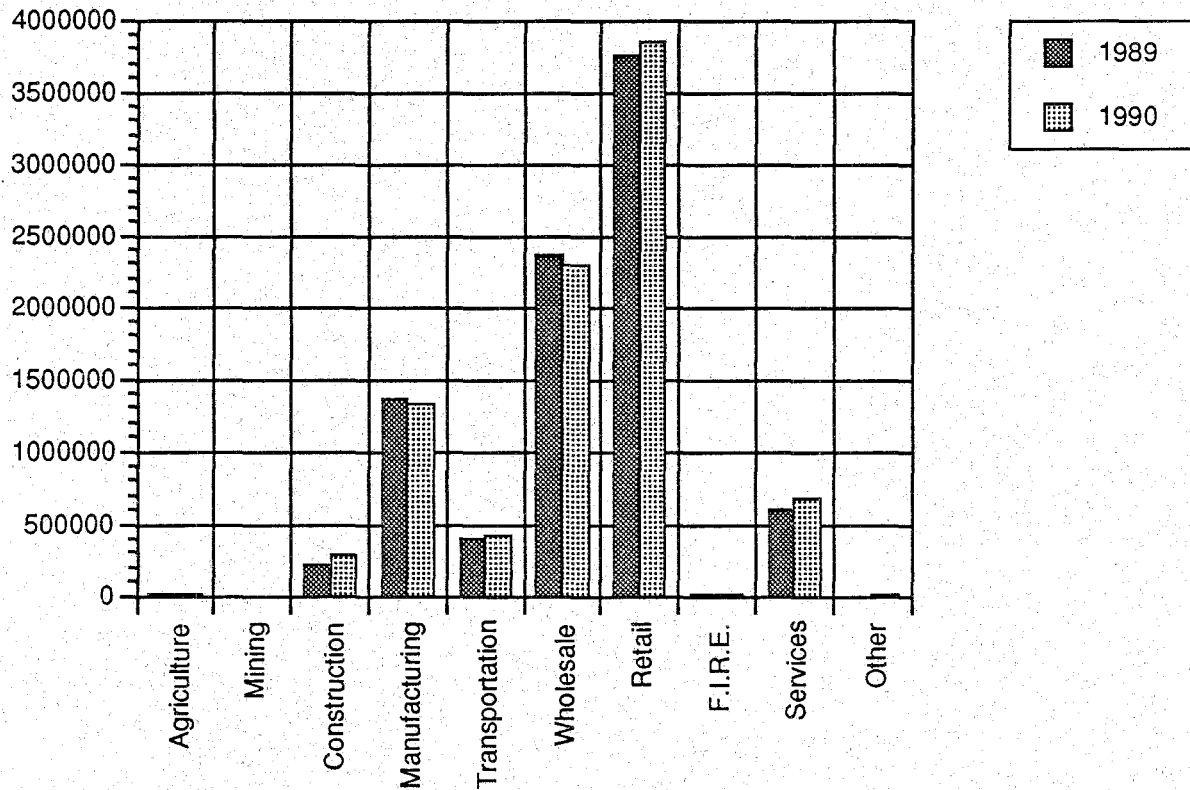


Industry	1986		1990		Growth (%)
	Dollars (000s)	Percent of Total	Dollars (000s)	Percent of Total	
Agriculture	13,533	.2	12,877	.1	-4.8
Mining	568	.0			-100.0
Construction	111,203	1.6	292,481	3.3	163.0
Manufacturing	1,339,214	19.7	1,334,295	15.0	-4
Transportation	418,925	6.2	417,560	4.7	-3
Wholesale	1,507,858	22.2	2,295,459	25.8	52.2
Retail	3,098,243	45.6	3,843,630	43.2	24.1
F.I.R.E.	4,244	.1	11,260	.1	165.3
Services	296,128	4.4	675,446	7.6	128.1
Public Admin. Other Government			4,950	.1	
Total	6,789,917	100.0	8,887,959	100.0	30.9

Note 1: Resale and wholesale data are combined.

Source: U.S. Department of Commerce, Bureau of Economic Analysis

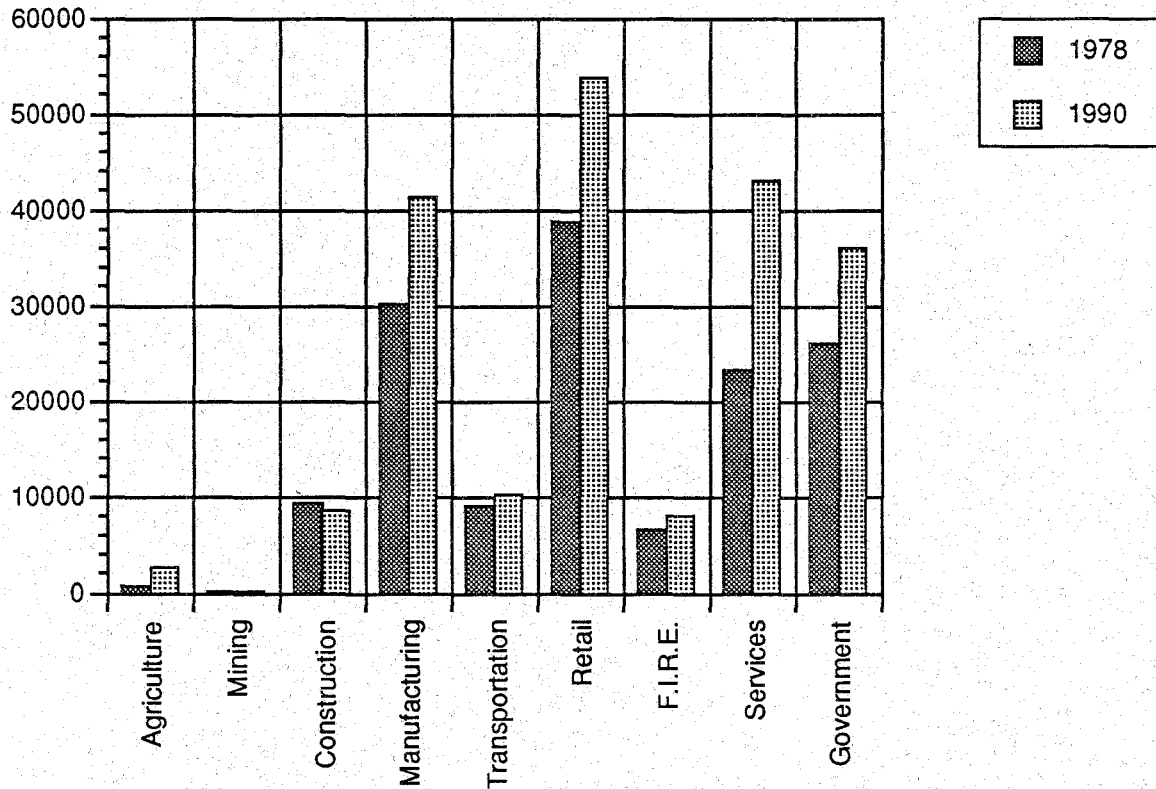
Gross Sector Product West Texas 1989-1990



Industry	1989 (000s)	Percent of Total	1990 (000s)	Percent of Total	Growth (%)
Agriculture	10,080	.1	12,877	.1	27.7
Mining	59				
Construction	219,436	2.5	292,481	3.3	33.3
Manufacturing	1,359,519	15.6	1,334,295	15.0	-1.9
Transportation	406,837	4.7	417,560	4.7	2.6
Wholesale	2,363,717	27.1	2,295,459	25.8	-2.9
Retail	3,754,310	43.0	3,843,630	43.3	2.4
F.I.R.E.	9,519	.1	11,260	.1	18.3
Services	598,288	6.9	675,446	7.6	12.9
Public Admin. Other Government			4,950		
Total	\$8,721,766	100.0	\$8,887,957	100.0	1.9

Source: Comptroller of Public Accounts, State of Texas

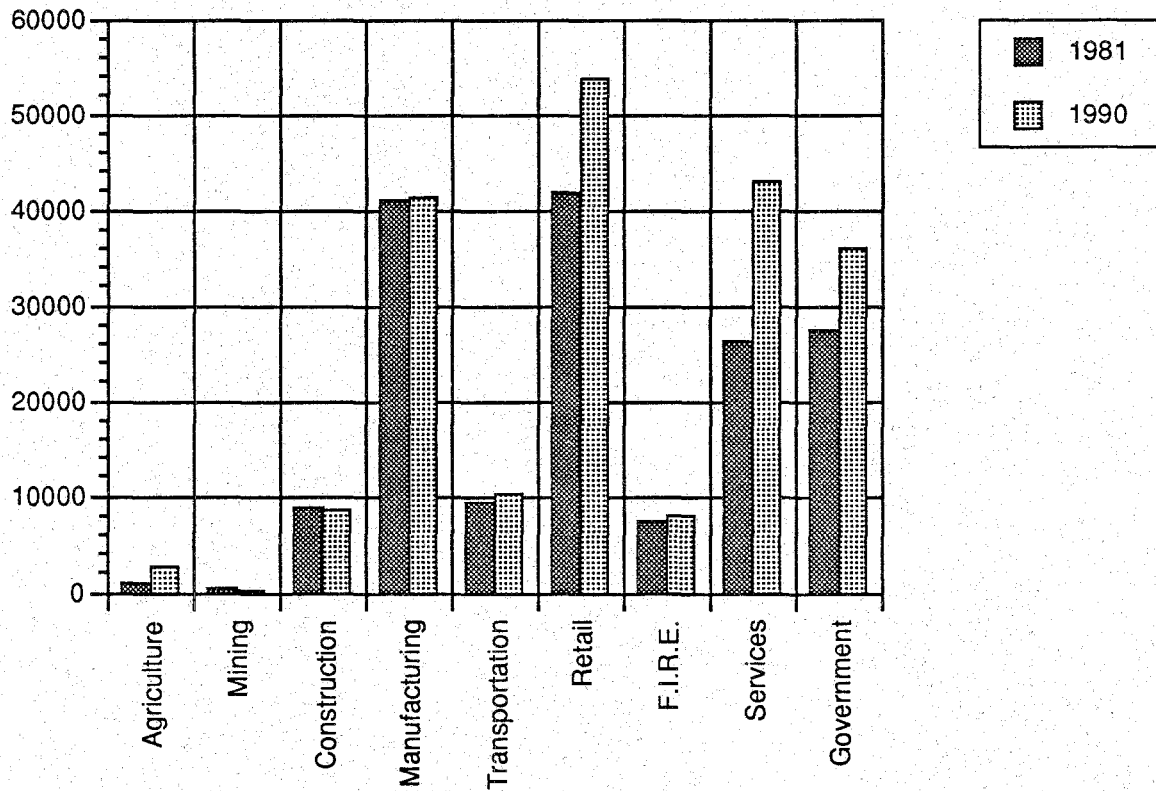
Employment by Industry West Texas 1978-1990



Industry	1978		1990		Growth (%)
	Employment	Percent of Total	Employment	Percent of Total	
Agriculture	797	.6	2,730	1.3	242.2
Mining	195	.1	50	.0	-74.0
Construction	9,324	6.5	8,581	4.2	-8.0
Manufacturing	30,071	20.9	41,417	20.3	37.7
Transportation	9,128	6.3	10,080	5.0	10.4
Wholesale					
Retail	38,759	26.9	53,869	26.5	39.0
F.I.R.E.	6,641	4.6	8,045	4.0	21.1
Services	23,277	16.1	42,855	21.0	84.1
Public Admin.					
Other					
Government	25,972	18.0	35,963	17.7	38.5
Total	144,164	100.0	203,590	100.0	41.2

Source: Texas Employment Commission

Employment by Industry West Texas 1981-1990



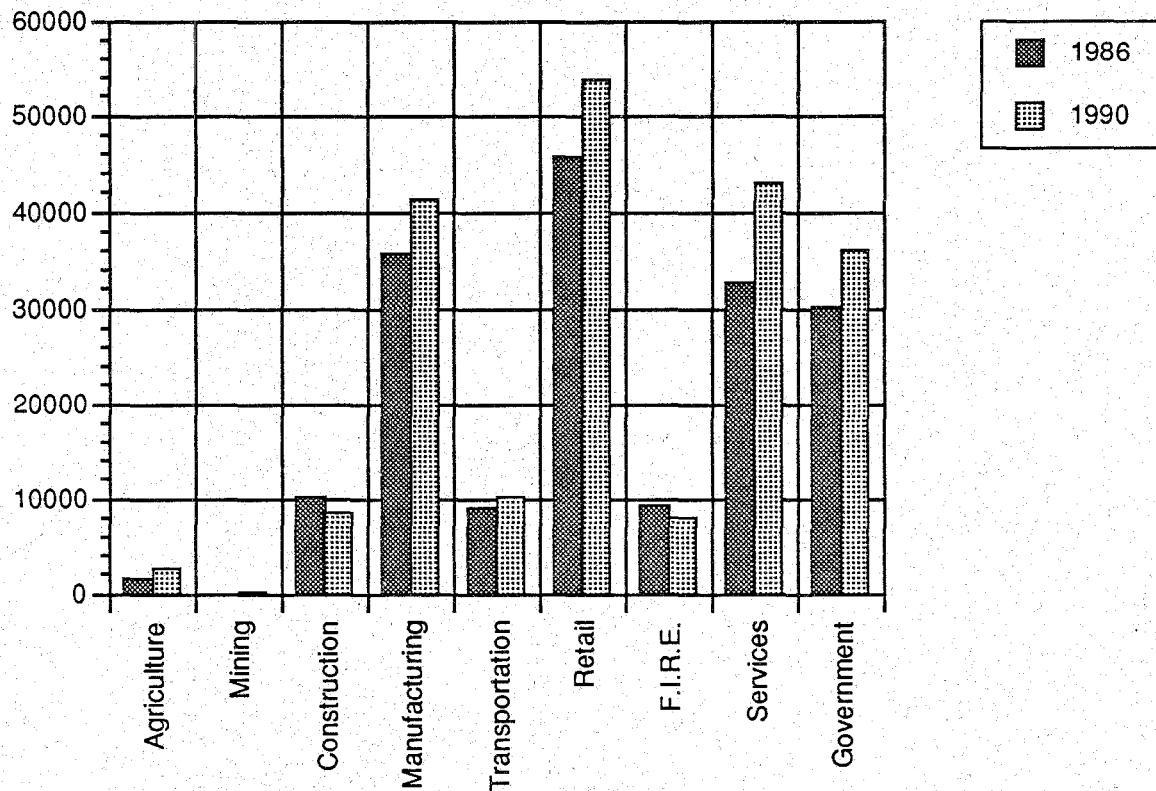
Industry	1981		1990		Growth (%)
	Employment	Percent of Total	Employment	Percent of Total	
Agriculture	1,043	.6	2,730	1.3	161.6
Mining	406	.2	50	.0	-87.5
Construction	8,830	5.4	8,581	4.2	-2.8
Manufacturing	41,000	25.1	41,417	20.3	1.0
Transportation	9,239	5.7	10,080	5.0	9.1
Wholesale					
Retail	41,967	25.7	53,869	26.5	28.4
F.I.R.E.	7,268	4.4	8,045	4.0	10.7
Services	26,281	16.1	42,855	21.0	63.1
Public Admin.					
Other					
Government	27,453	16.8	35,963	17.7	31.0
Total	163,487	100.0	203,590	100.0	24.5

Note 1: Resale and wholesale data are combined.

Note 2: Blanks represent unavailable data.

Source: Texas Employment Commission

Employment by Industry West Texas 1986-1990



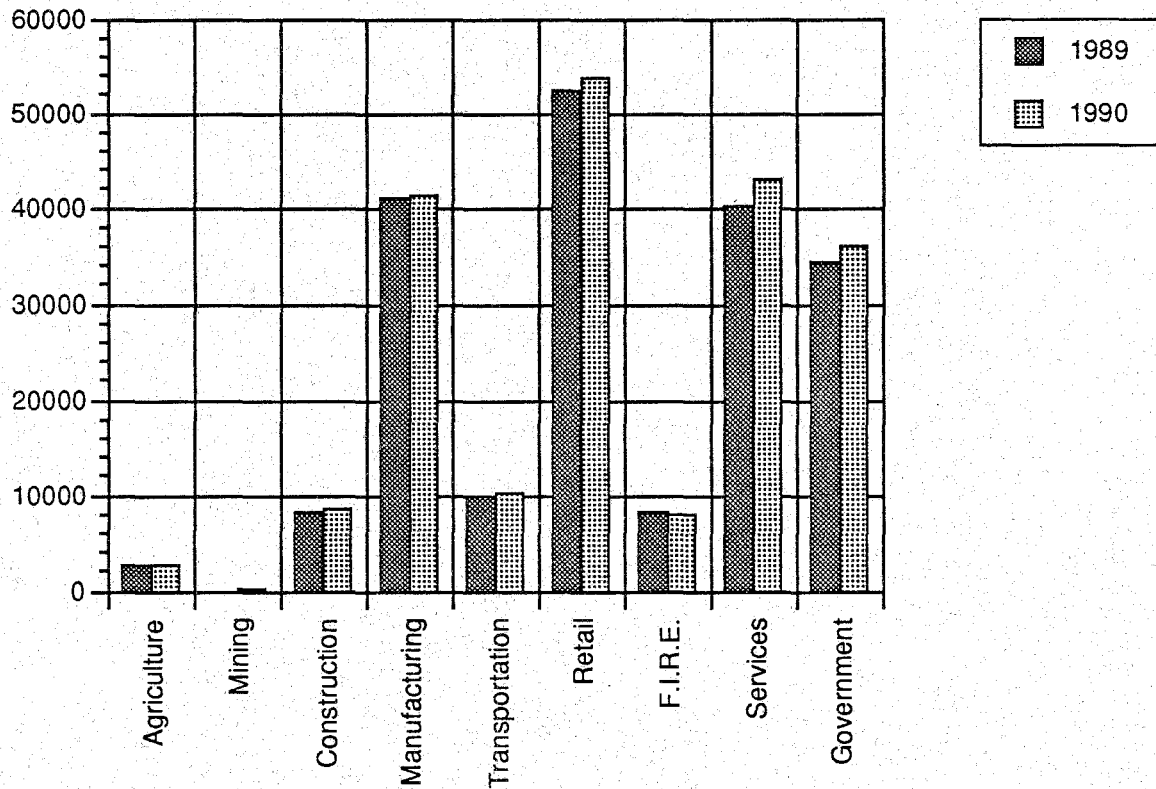
Industry	1986		1990		Growth (%)
	Employment	Percent of Total	Employment	Percent of Total	
Agriculture	1,467	.8	2,730	1.3	84.9
Mining	13	.0	50	.0	264.3
Construction	10,153	5.8	8,581	4.2	-15.5
Manufacturing	35,793	20.5	41,417	20.3	15.7
Transportation	8,943	5.1	10,080	5.0	12.7
Wholesale					
Retail	45,864	26.3	53,869	26.5	17.5
F.I.R.E.	9,243	5.3	8,045	4.0	-13.0
Services	32,782	18.8	42,855	21.0	30.7
Public Admin.					
Other					
Government	30,255	17.3	35,963	17.7	18.9
Total	174,522	100.0	203,590	100.0	16.7

Note 1: Retail and wholesale figures are combined.

Note 2: Blanks indicate unavailable data.

Source: Texas Employment Commission

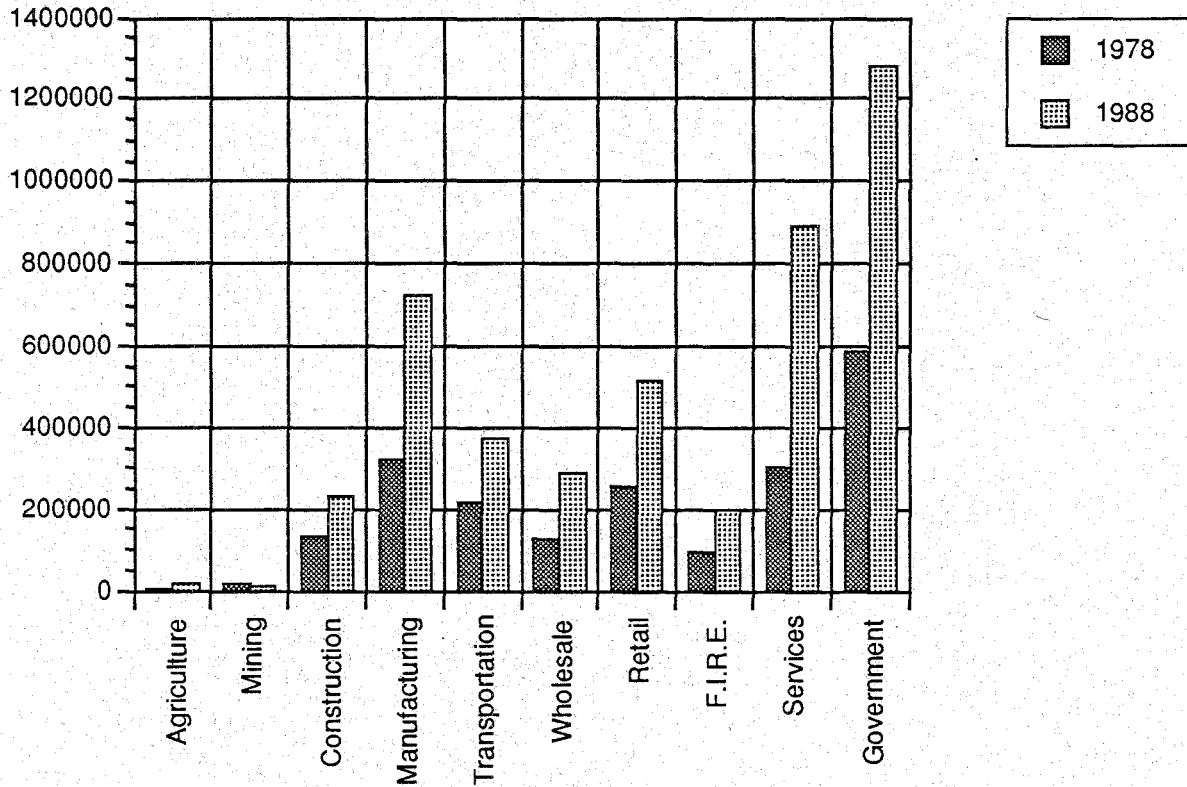
Employment by Industry West Texas 1989-1990



Industry	1989		1990		Growth (%)
	Employment	Percent of Total	Employment	Percent of Total	
Agriculture	2,662	1.4	2,730	1.3	2.6
Mining	50	.0	50	.0	.0
Construction	8,322	4.2	8,581	4.2	3.1
Manufacturing	41,116	20.9	41,417	20.3	.7
Transportation	9,852	5.0	10,080	5.0	2.3
Wholesale		.0		.0	.0
Retail	52,360	26.6	53,869	26.5	2.9
F.I.R.E.	8,257	4.2	8,045	4.0	-2.6
Services	40,104	20.4	42,855	21.0	6.9
Public Admin. Other					
Government	34,384	17.4	35,963	17.7	4.6
Total	197,057	100.0	203,590	100.0	3.3

Source: Texas Employment Commission

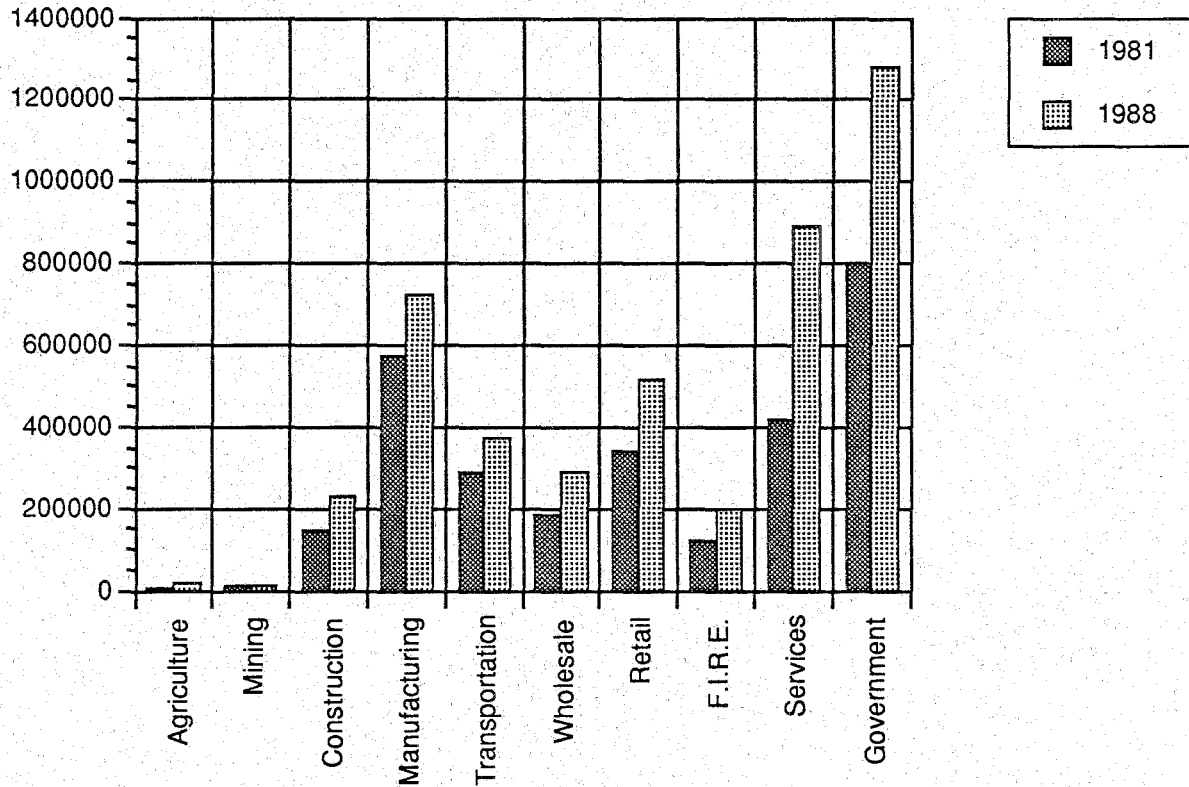
Total Salaries by Industry West Texas 1978-1988



Industry	1978		1988		Growth (%)
	Dollars (000s)	Percent of Total	Dollars (000s)	Percent of Total	
Agriculture	4,568	.2	15,960	.3	249.4
Mining	16,138	.8	11,469	.3	-28.9
Construction	132,683	6.4	231,239	5.1	74.3
Manufacturing	324,170	15.6	723,737	15.9	123.3
Transportation	216,197	10.4	373,615	8.2	72.8
Wholesale	125,263	6.0	292,412	6.4	133.4
Retail	259,158	12.5	513,374	11.3	98.1
F.I.R.E.	97,832	12.5	198,732	4.4	103.1
Services	303,041	14.6	894,724	19.6	195.2
Government	589,761	28.3	1,283,850	28.1	117.7
Total	\$2,080,309	100.0	\$4,560,945	100.0	

Source: U.S. Department of Commerce, Bureau of Economic Analysis

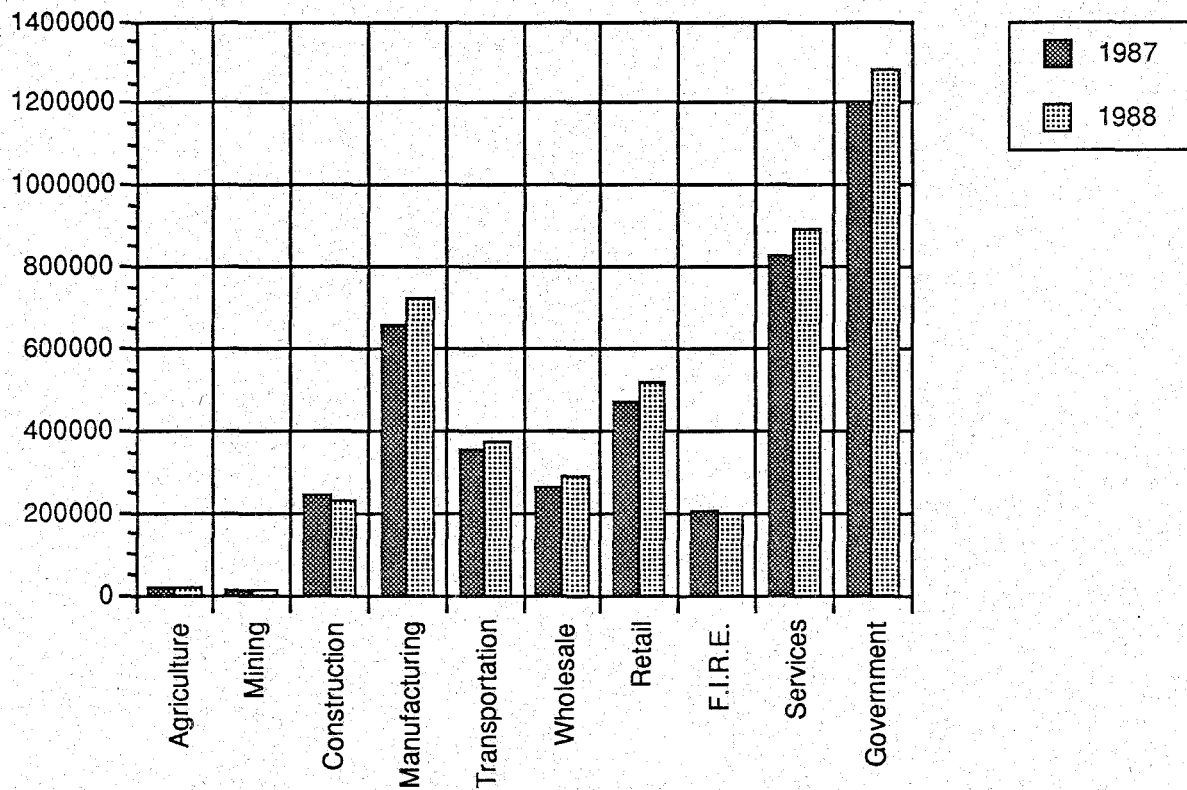
Total Salaries by Industry West Texas 1981-1988



Industry	1981		1988		Growth (%)
	Dollars (000s)	Percent of Total	Dollars (000s)	Percent of Total	
Agriculture	4,626	.2	15,960	.3	245.0
Mining	12,187	.4	11,469	.3	-5.9
Construction	148,787	5.1	231,239	5.1	55.4
Manufacturing	572,886	19.7	723,737	15.9	26.3
Transportation	287,965	9.9	373,615	8.2	29.7
Wholesale	185,074	6.4	292,412	6.4	58.0
Retail	341,048	11.7	513,374	11.3	50.5
F.I.R.E.	118,147	11.7	198,732	4.4	68.2
Services	418,164	14.4	894,724	19.6	114.0
Public Admin. Other					
Government	799,773	27.5	1,283,850	28.1	60.5
Total	2,910,533	100.0	4,560,945	100.0	56.7

Source: U.S. Department of Commerce, Bureau of Economic Analysis

Total Salaries by Industry West Texas 1987-1988



Industry	1987		1988		Growth (%)
	Dollars (000s)	Percent of Total	Dollars (000s)	Percent of Total	
Agriculture	14,001	.3	15,960	.3	14.0
Mining	12,236	.3	11,469	.3	-6.3
Construction	242,768	5.7	231,239	5.1	-4.7
Manufacturing	659,137	15.4	723,737	15.9	9.8
Transportation	353,596	8.3	373,615	8.2	5.7
Wholesale	263,726	6.2	292,412	6.4	10.9
Retail	472,407	11.1	513,374	11.3	8.7
F.I.R.E.	202,235	11.1	198,732	4.4	-1.7
Services	828,545	19.4	894,724	19.6	8.0
Public Admin.					
Other					
Government	1,201,735	28.1	1,283,850	28.1	6.8
Total	4,272,633	100.0	4,560,945	100.0	6.7

Note 1: Resale and wholesale data are combined.

Note 2: Blanks represent unavailable data.

Source: Texas Employment Commission

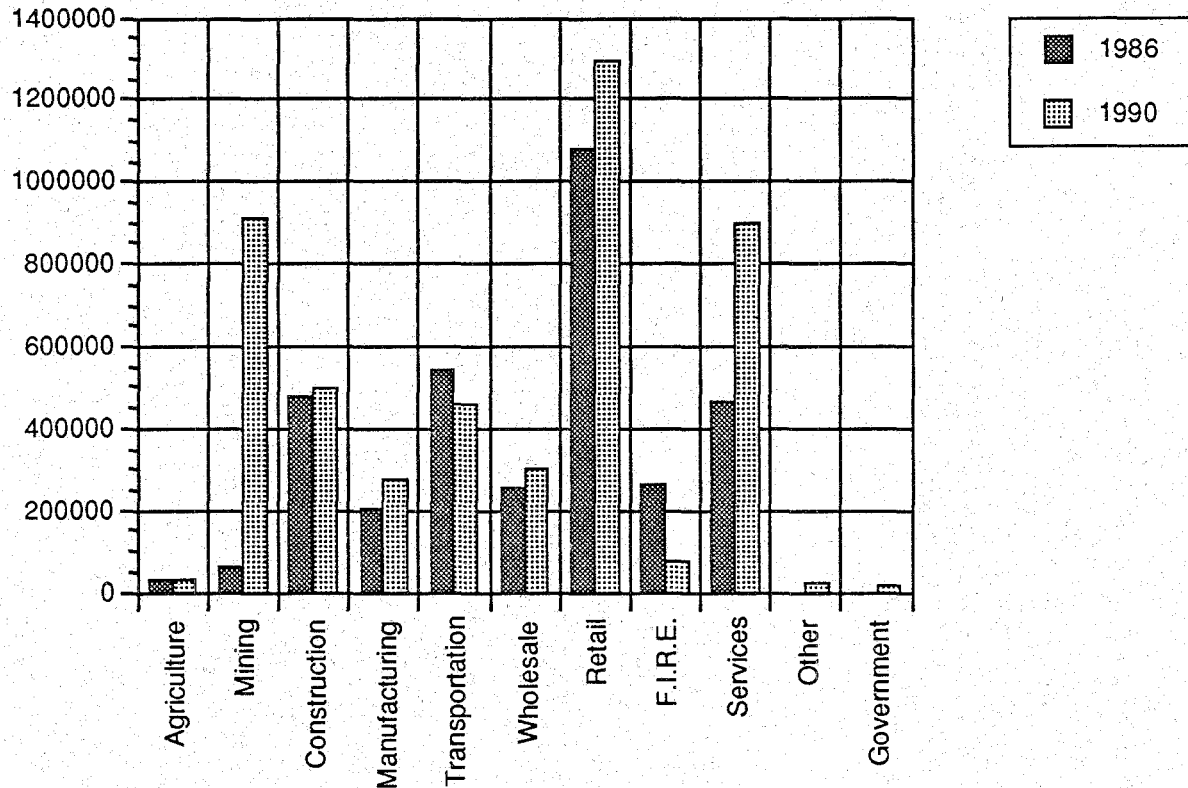
**WEST TEXAS
POPULATION DISTRIBUTION - 1990**

YEARS	WHITE		BLACK		INDIAN		ASIAN		OTHER		TOTAL		HISPANIC	
	MALE	FEMALE	MALE	FEMALE	MALE	FEMALE	MALE	FEMALE	MALE	FEMALE	MALE	FEMALE	MALE	FEMALE
Under 1	3,841	3,592	218	209	27	19	33	31	1,013	984	5,132	4,835	3,907	3,717
1 and 2	8,662	7,986	527	503	40	47	80	91	2,342	2,304	11,651	10,931	8,879	8,327
3 and 4	8,348	7,950	475	463	50	45	92	90	2,411	2,312	11,376	10,860	8,696	8,303
5	4,371	4,147	249	205	32	20	47	35	1,151	1,138	5,850	5,545	4,468	4,324
6	4,225	4,127	205	221	34	20	53	37	1,212	1,051	5,729	5,456	4,343	4,176
7 to 9	12,684	12,222	663	632	65	64	144	140	3,523	3,298	17,079	16,356	13,095	12,666
10 and 11	8,353	8,041	394	359	54	54	99	112	2,160	2,166	11,060	10,732	8,571	8,409
12 and 13	8,285	8,140	295	303	47	54	88	109	2,139	2,043	10,854	10,649	8,444	8,339
14	4,224	3,916	148	153	32	22	46	57	1,123	1,158	5,573	5,306	4,445	4,193
15	4,325	4,238	178	136	18	21	38	57	1,227	1,198	5,786	5,650	4,636	4,490
16	4,414	4,208	154	144	28	25	46	55	1,220	1,242	5,862	5,674	4,675	4,572
17	4,436	4,305	153	155	26	17	46	61	1,226	1,265	5,887	5,803	4,702	4,644
18	4,404	4,248	259	141	31	23	44	47	1,170	1,305	5,908	5,764	4,428	4,588
19	4,438	4,222	359	197	34	25	87	42	1,198	1,226	6,116	5,712	4,195	4,378
20	4,293	3,929	379	194	48	25	52	38	1,080	1,245	5,852	5,431	3,885	4,132
21	3,956	3,685	386	215	29	16	59	50	946	1,183	5,376	5,149	3,486	3,900
22 to 24	11,249	10,538	1,029	640	81	71	209	180	2,838	3,295	15,406	14,724	10,032	10,841
25 to 29	19,073	19,794	1,534	1,101	128	117	295	314	4,944	5,819	25,974	27,145	17,080	19,410
30 to 34	18,493	20,010	1,417	970	132	125	276	408	4,531	5,260	24,849	26,773	16,416	19,034
35 to 39	16,613	18,200	1,004	633	108	97	233	452	3,735	4,405	21,693	23,787	14,055	16,687
40 to 44	14,631	15,466	699	474	96	80	225	398	2,793	3,543	18,444	19,961	11,118	13,364
45 to 49	11,043	12,158	463	346	65	72	121	268	2,000	2,527	13,692	15,371	8,196	10,182
50 to 54	9,516	10,732	378	306	58	41	84	192	1,517	2,146	11,553	13,417	6,803	8,984
55 to 59	8,954	10,108	386	300	39	43	64	221	1,383	1,853	10,826	12,525	6,178	8,099
60 and 61	3,633	4,162	129	94	19	17	23	87	511	759	4,315	5,119	2,407	3,331
62 to 64	4,992	6,211	122	132	17	19	36	101	706	980	5,873	7,443	3,441	4,701
65 to 69	7,511	8,959	175	157	34	29	32	98	917	1,156	8,669	10,399	4,819	5,919
70 to 74	5,253	6,195	99	102	25	21	32	44	495	721	5,904	7,083	2,804	3,757
75 to 79	3,307	4,930	56	76	9	8	22	25	348	510	3,742	5,549	1,862	2,928
80 to 84	1,868	3,214	27	49	4	5	13	16	200	340	2,112	3,624	1,123	1,927
85 and over	1,128	2,696	20	35	3	8	2	9	137	242	1,290	2,990	776	1,575

	230,523	242,329	12,580	9,645	1,413	1,250	2,721	3,865	52,196	58,674	299,433	315,763	201,965	223,897

**Southern
New Mexico**

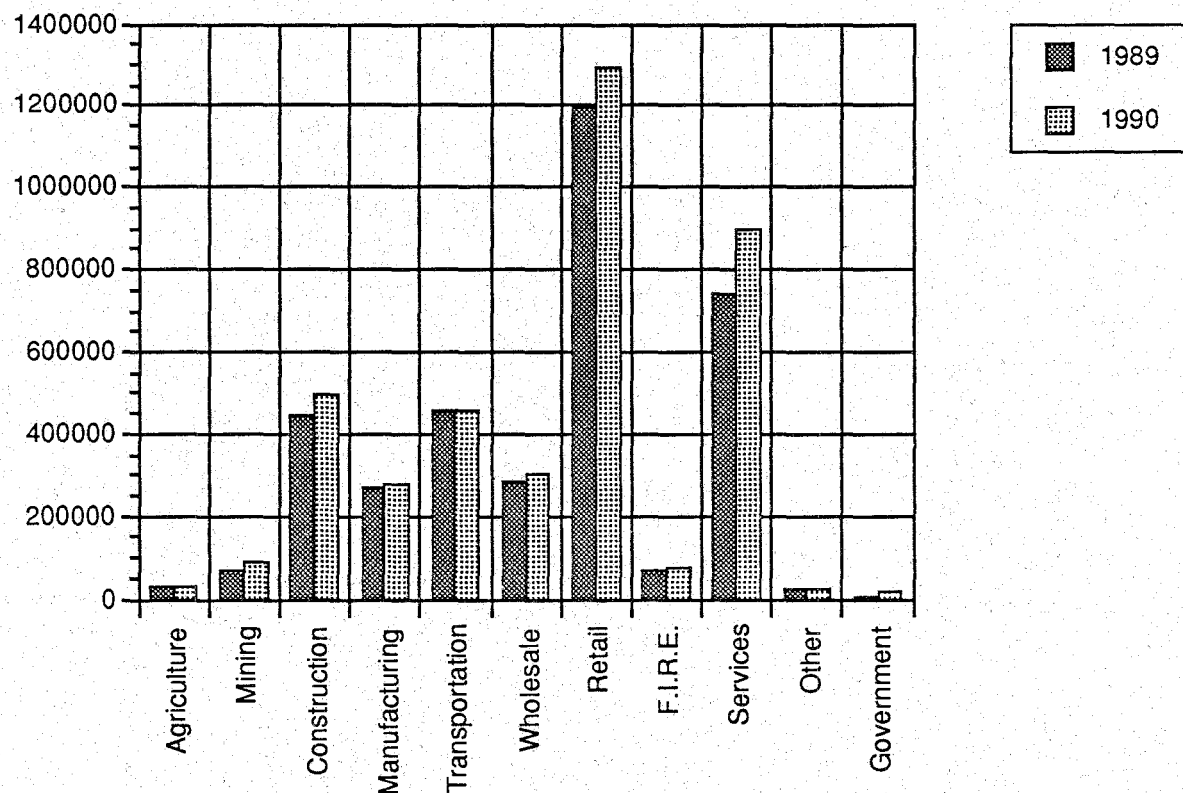
Gross Sector Product Southern New Mexico 1986-1990



Industry	1986		1990		Growth (%)
	Dollars (000s)	Percent of Total	Dollars (000s)	Percent of Total	
Agriculture	29,348	.9	29,010	.7	-1.2
Mining	63,452	1.9	90,839	2.3	43.2
Construction	476,952	14.1	495,634	12.5	3.9
Manufacturing	206,386	6.1	278,366	7.0	34.9
Transportation	539,812	16.0	459,719	11.6	-14.8
Wholesale	256,077	7.6	302,856	7.6	18.3
Retail	1,081,390	32.0	1,294,191	32.7	19.7
F.I.R.E.	261,512	7.7	72,575	1.8	-72.2
Services	467,373	13.8	897,415	22.7	92.0
Public Admin.					
Other			22,528	.6	
Government			18,625	.5	
Total	3,382,302	100.0	3,961,758	100.0	17.1

Source: Taxation and Revenue Department, New Mexico; Bureau of Economic Research, University of New Mexico

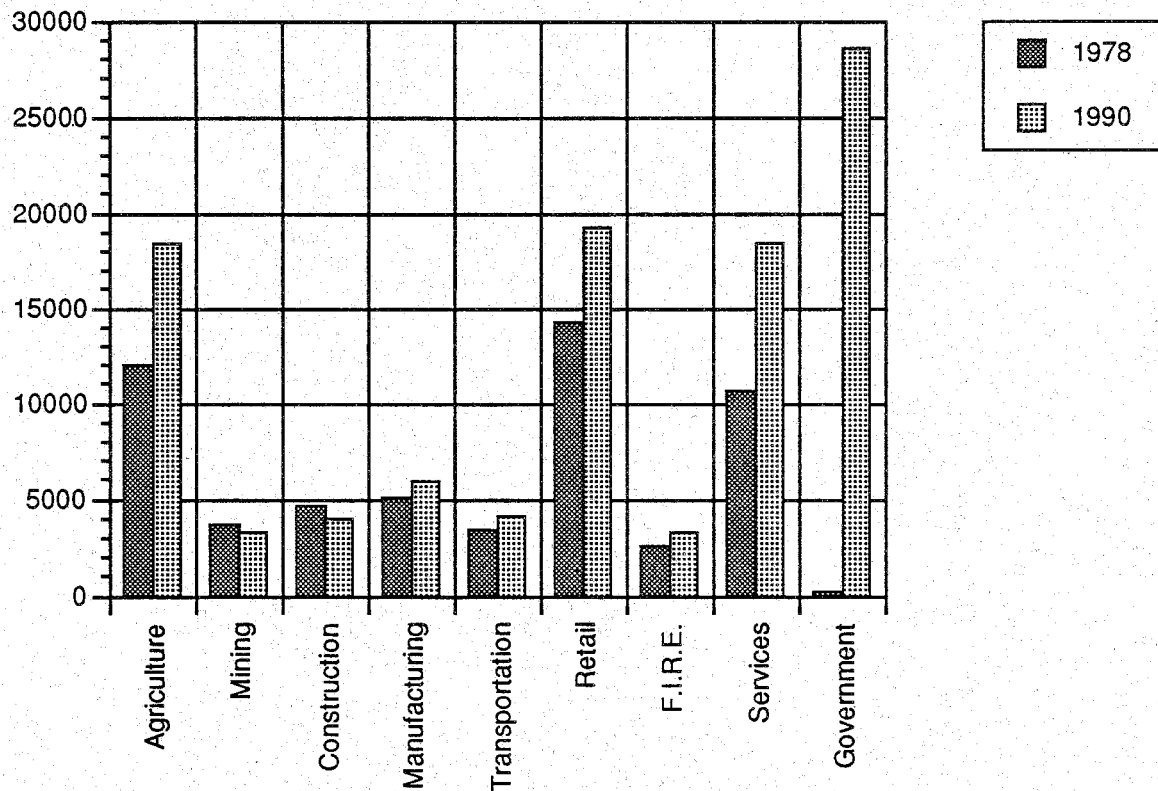
Gross Sector Product Southern New Mexico 1989-1990



Industry	1989 (000s)	Percent of Total	1990 (000s)	Percent of Total	Growth (%)
Agriculture	29,551	.8	29,010	.7	-1.8
Mining	70,688	2.0	90,839	2.3	28.5
Construction	442,540	12.3	495,634	12.5	12.0
Manufacturing	270,120	7.5	278,366	7.0	3.1
Transportation	456,258	12.7	459,719	11.6	.8
Wholesale	285,456	7.9	302,856	7.6	6.1
Retail	1,199,106	33.4	1,294,191	32.7	7.9
F.I.R.E.	66,905	1.9	72,575	1.8	8.5
Services	744,215	20.7	897,415	22.7	20.6
Public Admin.	\$.0	\$.0	.0
Other	24,890	.7	22,528	.6	-9.5
Government	5,772	.2	18,625	.5	222.7
Total	\$3,595,501	100.0	\$3,961,758	100.0	10.2

Source: Taxation and Revenue Department, New Mexico; Bureau of Business and Economic Research, University of New Mexico

Employment by Industry Southern New Mexico 1978-1990



Industry	1978		1990		Growth (%)
	Employment	Percent of Total	Employment	Percent of Total	
Agriculture	12,099	21.4	18,424	17.5	52.3
Mining	3,648	6.5	3,213	3.1	-11.9
Construction	4,680	8.3	3,922	3.7	-16.2
Manufacturing	5,094	9.0	5,972	5.7	17.2
Transportation	3,432	6.1	4,101	3.9	19.5
Wholesale					
Retail	14,228	25.2	19,191	18.3	34.9
F.I.R.E.	2,567	4.5	3,217	3.1	25.3
Services	10,574	18.7	18,446	17.6	74.4
Public Admin.					
Other					
Government	210	4	28,618	27.2	
Total	56,532	100.0	105,104	100.0	85.9

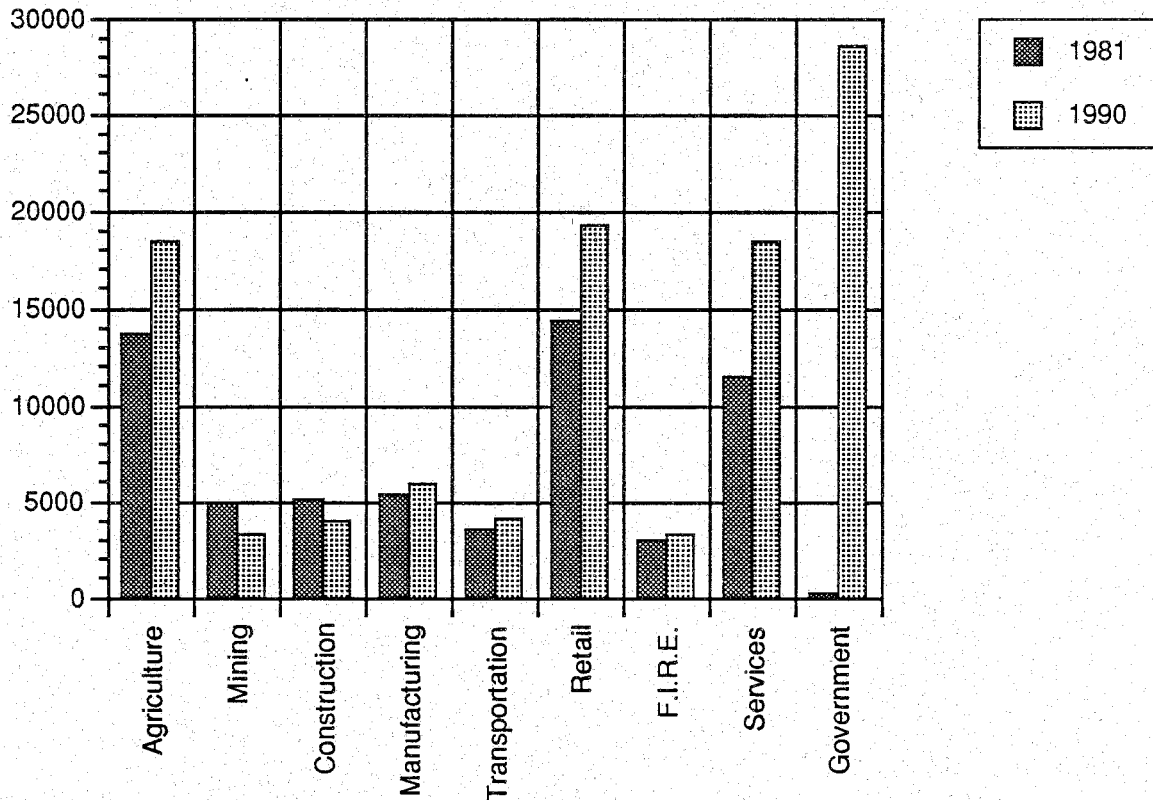
Note 1: Retail and wholesale figures are combined.

Note 2: Blanks indicate unavailable data.

Note 3: Government employees may be included in New Mexico's agriculture statistics for some years.

Source: New Mexico Department of Labor, Economic Research and Analysis Division; New Mexico Employment Security Department, Bureau of Economic Research & Analysis; *Migrant and Seasonal Farmworkers in New Mexico Report*, New Mexico Health and Environmental Department

Employment by Industry Southern New Mexico 1981-1990



Industry	1981		1990		Growth
	Employment	Percent of Total	Employment	Percent of Total	
Agriculture	13,763	22.3	18,424	17.5	33.9
Mining	4,966	8.0	3,213	3.1	-35.3
Construction	5,069	8.2	3,922	3.7	-22.6
Manufacturing	5,368	8.7	5,972	5.7	11.2
Transportation	3,600	5.8	4,101	3.9	13.9
Wholesale					
Retail	14,341	23.2	19,191	18.3	33.8
F.I.R.E.	2,936	4.8	3,217	3.1	9.6
Services	11,530	18.7	18,446	17.6	60.0
Public Admin.					
Other					
Government	226	.4	28,618	27.2	
Total	61,799	100.0	105,104	100.0	70.1

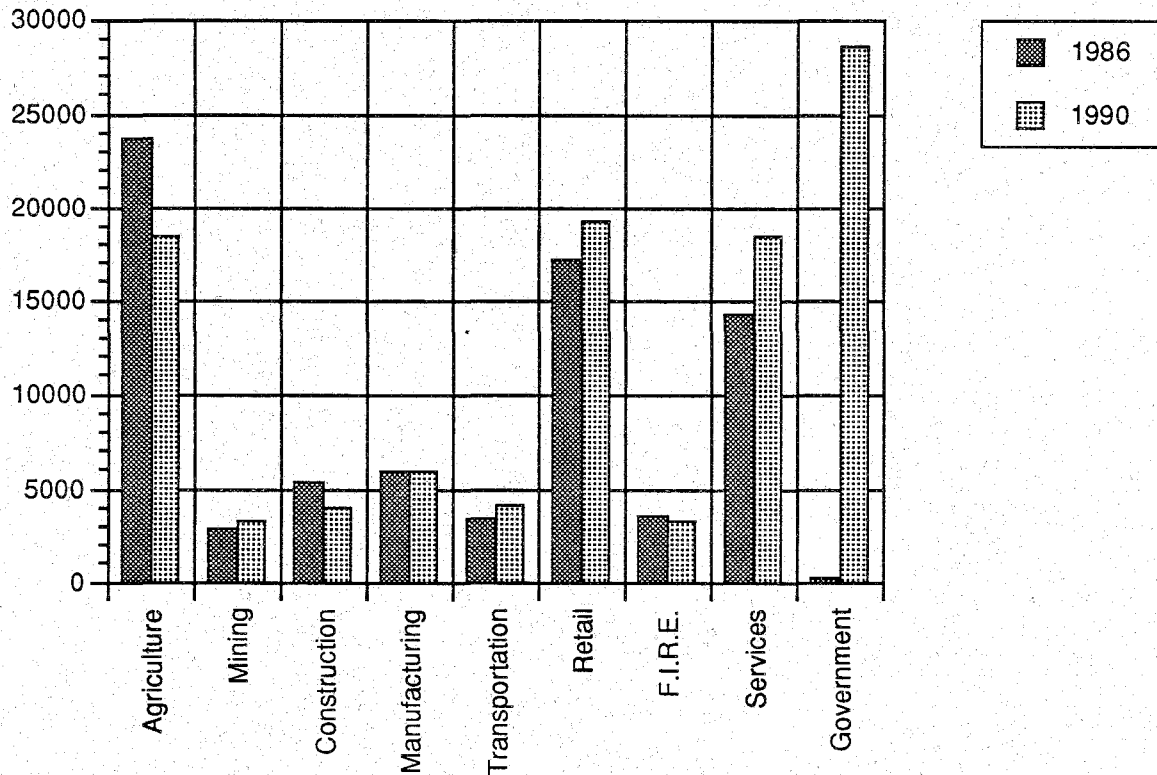
Note 1: Retail and wholesale figures are combined.

Note 2: Blanks indicate unavailable data.

Note 3: Government employees may be included in New Mexico's agriculture statistics for some years.

Source: New Mexico Department of Labor, Economic Research and Analysis Division; New Mexico Employment Security Department, Bureau of Economic Research & Analysis; *Migrant and Seasonal Farmworkers in New Mexico Report*, New Mexico Health and Environmental Department

Employment by Industry Southern New Mexico 1986-1990



Industry	1986		1990		Growth (%)
	Employment	Percent of Total	Employment	Percent of Total	
Agriculture	23,652	31.0	18,424	17.5	-22.1
Mining	2,923	3.8	3,213	3.1	9.9
Construction	5,373	7.0	3,922	3.7	-27.0
Manufacturing	5,869	7.7	5,972	5.7	1.8
Transportation	3,395	4.4	4,101	3.9	20.8
Wholesale					
Retail	17,164	22.5	19,191	18.3	11.8
F.I.R.E.	3,513	4.6	3,217	3.1	-8.4
Services	14,245	18.6	18,446	17.6	29.5
Public Admin.					
Other					
Government	258	.3	28,618	27.2	
Total	76,392	100.0	105,104	100.0	37.6

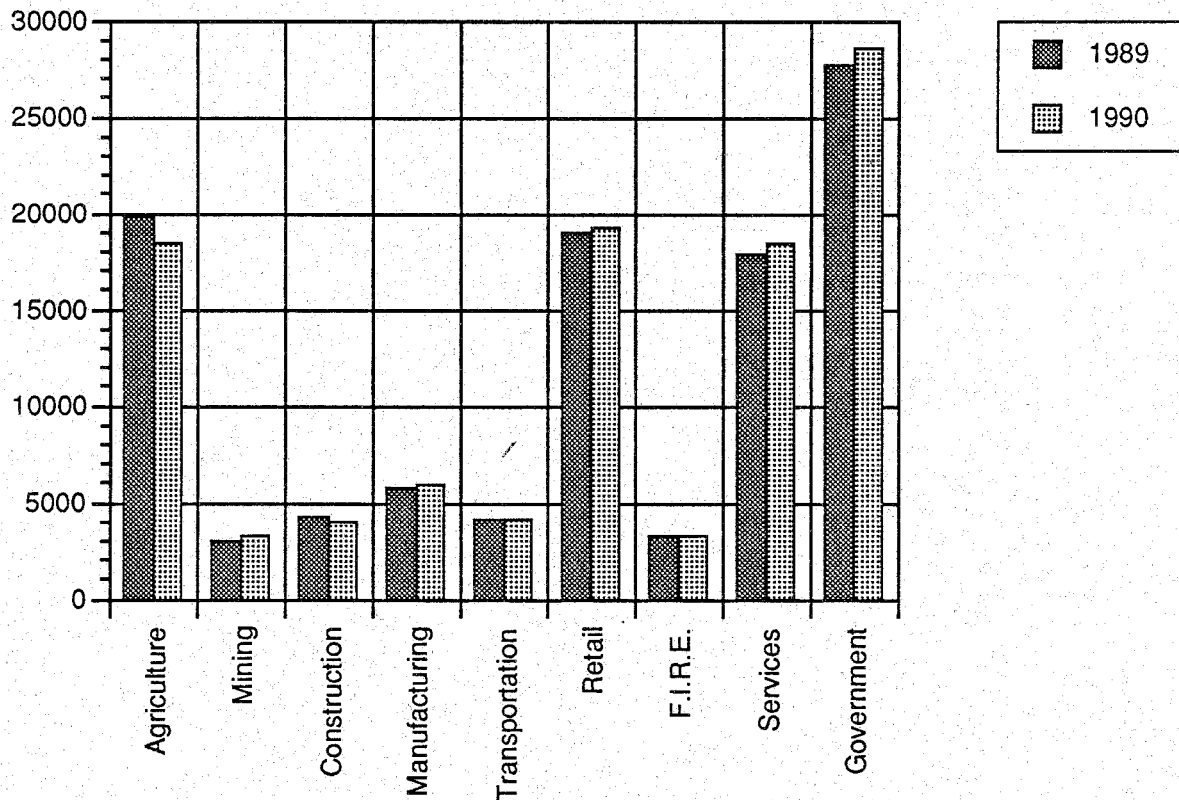
Note 1: Retail and wholesale figures are combined.

Note 2: Blanks indicate unavailable data.

Note 3: Government employees may be included in New Mexico's agriculture statistics for some years.

Source: New Mexico Department of Labor, Economic Research and Analysis Division; New Mexico Employment Security Department, Bureau of Economic Research & Analysis; *Migrant and Seasonal Farmworkers in New Mexico Report*, New Mexico Health and Environmenta Department

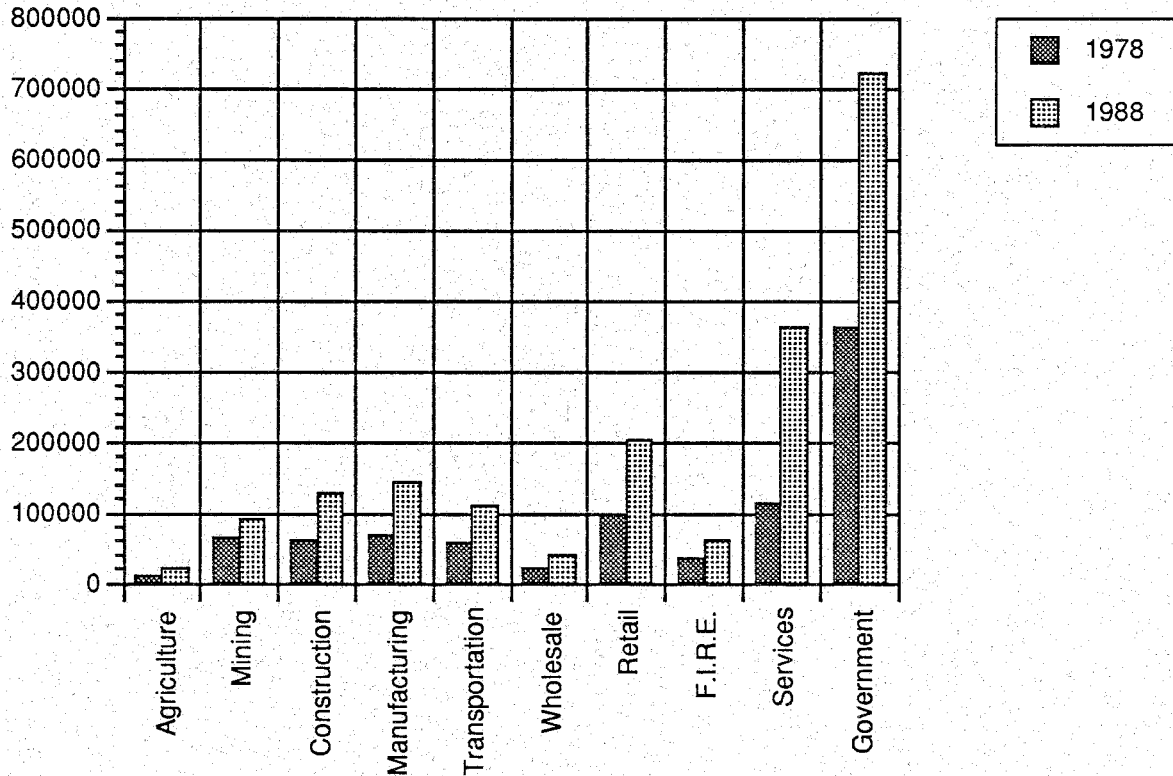
Employment by Industry Southern New Mexico 1989-1990



Industry	1989		1990		Growth (%)
	Employment	Percent of Total	Employment	Percent of Total	
Agriculture	19,741	18.9	18,424	17.5	-6.7
Mining	3,072	2.9	3,213	3.1	4.6
Construction	4,287	4.1	3,922	3.7	-8.5
Manufacturing	5,843	5.6	5,972	5.7	2.2
Transportation	4,053	3.9	4,101	3.9	1.2
Wholesale		.0		.0	.0
Retail	18,943	18.1	19,191	18.3	1.3
F.I.R.E.	3,233	3.1	3,217	3.1	-.5
Services	17,832	17.0	18,446	17.6	3.4
Public Admin.		.0		.0	.0
Other		.0		.0	.0
Government	27,675	26.4	28,618	27.2	3.4
Total	104,679	100.0	105,104	100.0	.4

Source: New Mexico Department of Labor, Economic Research & Analysis Division; New Mexico Employment Security Department, Bureau of Economic Research & Analysis; *Migrant and Seasonal Farm Workers in New Mexico Report*, New Mexico Health & Environmental Department

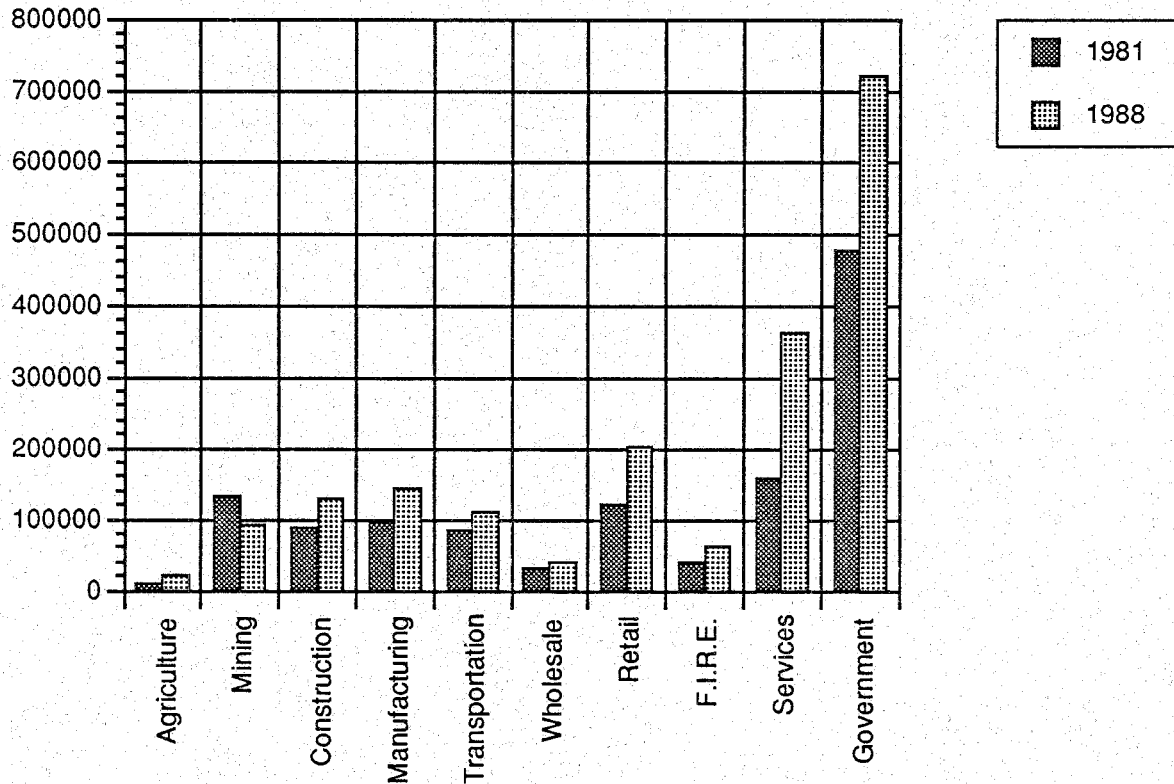
Total Salaries by Industry Southern New Mexico 1978-1988



Industry	1978		1988		Growth (%)
	Dollars (000s)	Percent of Total	Dollars (000)	Percent of Total	
Agriculture	9,714	1.1	19,781	1.0	103.6
Mining	67,122	7.5	92,389	4.9	37.6
Construction	63,035	7.0	128,762	6.8	104.3
Manufacturing	67,688	7.5	142,660	7.6	110.8
Transportation	57,965	6.5	110,707	5.9	91.0
Wholesale	22,604	2.5	39,563	2.1	75.0
Retail	99,270	11.1	203,286	10.8	104.8
F.I.R.E.	35,864	11.1	62,681	3.3	74.8
Services	113,692	12.7	362,656	19.2	219.0
Government	360,372	40.2	722,345	38.3	100.4
Total	\$897,365	100.0	\$1,885,751	100.0	

Source: U.S. Department of Commerce, Bureau of Economic Analysis

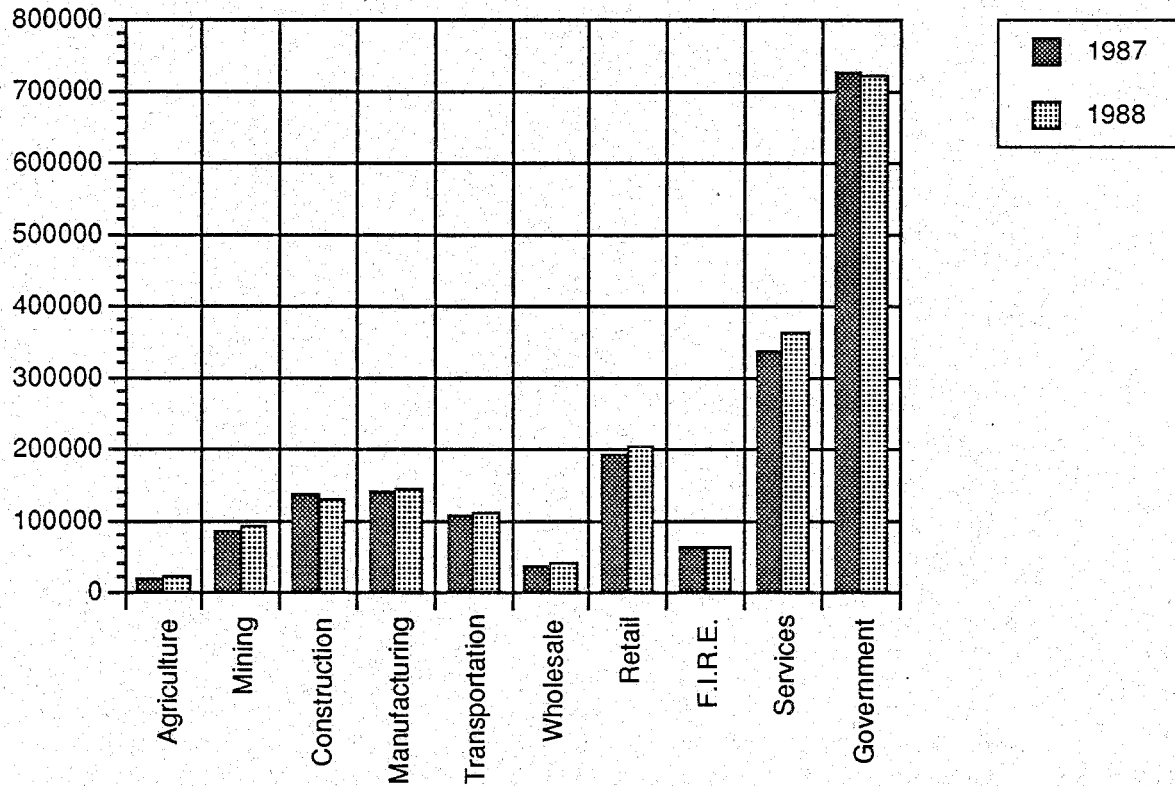
Total Salaries by Industry Southern New Mexico 1981-1988



Industry	1981		1988		Growth (%)
	Dollars (000s)	Percent of Total	Dollars (000s)	Percent of Total	
Agriculture	11,346	.9	19,781	1.0	74.3
Mining	131,769	10.7	92,389	4.9	-29.9
Construction	86,181	7.0	128,762	6.8	49.4
Manufacturing	93,353	7.5	142,660	7.6	52.8
Transportation	83,378	6.7	110,707	5.9	32.8
Wholesale	31,349	2.5	39,563	2.1	26.2
Retail	120,913	9.8	203,286	10.8	68.1
F.I.R.E.	38,479	9.8	62,681	3.3	62.9
Services	158,794	12.8	362,656	19.2	128.4
Public Admin. Other Government	477,336	38.6	722,345	38.3	51.3
Total	1,236,910	100.0	1,885,751	100.0	52.5

Source: U.S. Department of Commerce, Bureau of Economic Analysis

Total Salaries by Industry Southern New Mexico 1987-1988



Industry	1987		1988		Growth (%)
	Dollars (000s)	Percent of Total	Dollars (000s)	Percent of Total	
Agriculture	17,633	1.0	19,781	1.0	12.2
Mining	84,259	4.6	92,389	4.9	9.6
Construction	136,976	7.5	128,762	6.8	-6.0
Manufacturing	137,575	7.6	142,660	7.6	3.7
Transportation	107,001	5.9	110,707	5.9	3.5
Wholesale	36,328	2.0	39,563	2.1	8.9
Retail	191,795	10.5	203,286	10.8	6.0
F.I.R.E.	62,685	10.5	62,681	3.3	-0.0
Services	334,840	18.4	362,656	19.2	8.3
Public Admin. Other					
Government	772,762	39.7	722,345	38.3	-1.1
Total	1,820,854	100.0	1,885,751	100.0	3.6

Source: U.S. Department of Commerce, Bureau of Economic Analysis

**SOUTHERN NEW MEXICO
POPULATION DISTRIBUTION - 1990**

YEARS	WHITE		BLACK		INDIAN		ASIAN		OTHER		TOTAL		HISPANIC	
	MALE	FEMALE	MALE	FEMALE	MALE	FEMALE	MALE	FEMALE	MALE	FEMALE	MALE	FEMALE	MALE	FEMALE
Under 1	1,746	1,629	54	56	43	60	21	12	211	191	2,075	1,948	1,162	1,045
1 and 2	4,132	3,945	139	142	111	109	49	44	518	480	4,949	4,720	2,701	2,592
3 and 4	4,044	3,788	133	121	123	111	41	41	494	467	4,835	4,528	2,644	2,513
5	2,075	2,019	72	64	45	57	18	21	252	222	2,462	2,383	1,384	1,305
6	2,095	1,968	62	67	70	60	23	15	253	210	2,503	2,320	1,372	1,212
7 to 9	6,145	5,973	187	163	132	170	59	60	667	715	7,190	7,081	3,886	3,893
10 and 11	3,997	3,773	132	116	91	95	37	42	468	464	4,725	4,490	2,558	2,419
12 and 13	3,834	3,661	91	103	78	99	41	38	426	443	4,470	4,344	2,467	2,386
14	1,882	1,830	56	50	49	32	13	28	224	197	2,224	2,137	1,249	1,204
15	1,923	1,787	42	46	43	39	20	24	219	223	2,247	2,119	1,264	1,159
16	1,821	1,683	48	34	36	44	11	21	208	185	2,124	1,967	1,205	1,093
17	1,792	1,829	61	37	31	37	15	28	190	216	2,089	2,147	1,144	1,241
18	1,898	1,983	53	49	40	47	16	18	196	201	2,203	2,298	1,157	1,227
19	2,216	2,104	71	52	62	54	9	15	232	237	2,590	2,462	1,244	1,193
20	2,209	2,050	101	70	52	54	15	22	212	258	2,589	2,454	1,158	1,208
21	2,082	1,949	69	46	46	64	21	15	216	204	2,434	2,278	1,091	1,146
22 to 24	5,467	5,142	236	160	149	131	81	74	662	596	6,595	6,103	2,997	3,025
25 to 29	9,703	9,378	409	253	220	208	120	153	1,066	1,111	11,518	11,103	5,178	5,304
30 to 34	9,245	9,413	314	236	169	201	112	174	944	1,002	10,784	11,026	4,656	5,058
35 to 39	8,470	8,634	289	200	150	145	92	176	814	789	9,815	9,944	4,049	4,211
40 to 44	7,486	7,423	168	120	103	110	39	149	608	594	8,404	8,396	3,191	3,440
45 to 49	5,918	6,111	97	80	80	87	45	61	393	399	6,533	6,738	2,381	2,565
50 to 54	5,072	5,466	99	82	72	82	33	64	284	380	5,560	6,074	1,955	2,296
55 to 59	5,294	5,485	96	70	66	73	23	47	297	368	5,776	6,043	2,002	2,142
60 and 61	2,125	2,229	23	40	16	23	4	20	126	157	2,294	2,469	769	814
62 to 64	3,102	3,339	57	49	31	34	10	32	187	178	3,387	3,632	1,061	1,095
65 to 69	4,954	5,377	66	82	48	45	11	20	249	253	5,328	5,777	1,475	1,429
70 to 74	3,824	4,176	39	62	31	21	9	10	149	174	4,052	4,443	880	1,004
75 to 79	2,678	3,419	40	53	14	24	1	2	105	112	2,838	3,610	602	794
80 to 84	1,494	2,177	18	27	8	18	4	1	42	90	1,566	2,313	366	505
85 and over	849	1,758	26	32	8	7	1	3	42	52	926	1,852	260	381

	119,572	121,498	3,348	2,762	2,217	2,341	994	1,430	10,954	11,168	137,085	139,199	59,508	60,899