

BOTA Modernization

Economic and Trade Effects in El Paso County

August 2026



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EXECUTIVE SUMMARY

The U.S.-Mexico border supports extensive movement of goods and people through a network of land ports of entry that connect major production, logistics, and consumer markets in both countries. Within the three major border regions examined in this study, Laredo, Paso del Norte, and San Diego, the Paso del Norte region was the only region to record truck export growth.¹ The region is served by four commercial land ports of entry: the Bridge of the Americas (BOTA), Tornillo-Guadalupe, and Ysleta-Zaragoza in Texas, and Santa Teresa in New Mexico.²

BOTA is scheduled for a major modernization by the U.S. General Services Administration (GSA). Following completion of the federal environmental review process, GSA selected Viable Action Alternative 4, which provides for a multilevel modernization of the facility and the elimination of commercial cargo operations at BOTA. The selected alternative would expand and modernize facilities serving pedestrian and noncommercial vehicle traffic while permanently redistributing commercial cargo movements currently processed at BOTA to other ports of entry (PoE). Under GSA's current project schedule, construction is expected to begin in early 2028 and be completed in summer 2031.

As part of the federal environmental review process, GSA evaluated the potential environmental, transportation, socioeconomic, and other effects of the proposed modernization alternatives. The Final Environmental Impact Statement (EIS) also considered economic effects associated with the construction phase and potential changes to noncommercial crossings under the evaluated alternatives.³ The Final EIS determined that Action Alternative 4's cessation of commercial traffic operations at BOTA would have a "Moderate-Significant Beneficial Impact" on air quality in the vicinity of the BOTA PoE.

A more recent preliminary model in development by the El Paso Metropolitan Planning Organization (MPO) evaluated the impact of closing BOTA's commercial lanes using the same pollutant categories examined in the GSA's analysis. The MPO analysis supports the GSA finding that a moderate-to-significant reduction in emissions can be expected in the vicinity of BOTA. However, a moderate-to-significant increase in emissions is also expected at the Ysleta-Zaragoza PoE. The MPO analysis estimates that the cessation of commercial traffic operations at BOTA would reduce pollutant emissions in the vicinity of BOTA, increase emissions at the remaining PoEs, and produce an overall negative impact on air quality across the Paso del Norte region. This report addresses a separate economic research question from the GSA and MPO environmental reviews and does not replicate or independently review these environmental analyses.

The Hunt Institute for Global Competitiveness was subsequently commissioned by the El Paso Chamber to conduct a comprehensive economic impact study focused on the potential economic and trade-related implications of the selected modernization alternative. This report provides a net economic impact assessment for El Paso County by evaluating the relevant economic gains and economic losses associated with the modernization within a common analytical framework. Specifically, the analysis considers the economic gains associated with the new construction project and additional noncommercial crossings, as well as the economic losses associated with forgone truck trade resulting from the cessation of commercial cargo operations at BOTA. The report also evaluates the corresponding tax implications, which were supported by the analysis.

¹ Top border regions were selected based on trade value and commercial crossings during the 2020-2026 reporting period. The Laredo region comprises the Laredo PoE in TX; the Paso del Norte region comprises the Bridge of the Americas (BOTA), Tornillo, and Ysleta PoEs in TX and Santa Teresa PoE in NM; and the San Diego region comprises the Otay Mesa, San Ysidro, and Tecate PoEs in CA.

² Throughout this report, El Paso County, Texas, refers specifically to the county-level geographic area in far West Texas, including the City of El Paso and surrounding municipalities and communities. The Paso del Norte region refers to the broader binational, tri-state area encompassing El Paso, Texas; Ciudad Juárez, Chihuahua; and Doña Ana County in New Mexico. Unless otherwise specified, references to regional economic and cross-border activity use this broader geographic context.

³ U.S. General Services Administration, *Bridge of the Americas Land Port of Entry Final Environmental Impact Statement*, accessed June 2026, <https://www.gsa.gov/system/files/BOTA%20Final%20EIS.pdf>.



Bridge of the Americas PoE located in El Paso, Texas

The report consists of three complementary analytical areas:

1. **Net Economic Impact Assessment.** The first analytical area estimates the economic gains and economic losses associated with the modernization.
2. **Logistics-Cost Assessment.** The second analytical area separately evaluates potential changes in transportation and operational costs to firms associated with the cessation of commercial traffic at BOTA.
3. **Firm and Business Survey Responses and Self-Selected Follow-Up Interviews.** The third analytical area examines potential firm-level operational effects using firm and business survey responses and self-selected follow-up interviews.

Together, these analytical areas are supported by a broader review of U.S.-Mexico trade, historical crossing activity, BOTA's role within the Paso del Norte transportation system, comparable infrastructure disruptions, and profiles of BOTA and surrounding PoEs.

Within the net economic impact assessment, three economic components are evaluated separately before being considered together:

- A. **Economic Gains Associated with Construction.** Based on GSA's estimated construction budget of \$430 million for BOTA's modernization project, this analysis estimates that construction would support 3,112 job-years, \$202.9 million in labor income, \$616.8 million in output, and \$1.8 million in taxes in El Paso County for the 2028-2036 period.⁴
- B. **Economic Gains Associated with Additional Noncommercial Crossings.** Available El Paso MPO estimates for noncommercial traffic did not capture potential economic gains associated with additional noncommercial crossings, as the noncommercial crossing estimates remained unchanged with the modernization. Given the available data, the Institute relied on the framework and results developed by GSA to incorporate potential economic gains associated with additional noncommercial crossings into the net economic impact assessment. Using these estimates, the report incorporates 4,014 job-years, \$128.1 million in labor income, and \$514.4 million in output in El Paso County into the net economic impact framework.
- C. **Economic Losses Associated with Forgone Truck Trade.** The analysis evaluates the economic losses associated with the elimination of commercial cargo operations at BOTA and the resulting projected forgone truck trade value in El Paso County.⁵ Under this scenario, the analysis estimates a leakage rate of 10.9%, defined as commercial traffic loss for the Paso del Norte region once BOTA ceases commercial traffic. The analysis further estimates that the remaining regional commercial truck crossings would be redistributed as follows: Ysleta (64.3%), Santa Teresa (34.4%), and Tornillo (1.3%).

⁴ Job-year refers to a unit of measurement equal to one full-time job lasting for the duration of a calendar year..

⁵ Forgone truck trade represents the value of commercial activity that is estimated not to be accommodated within the relevant transportation network under the assumptions of the analysis.

Under the modeled commercial-traffic cessation scenario, the analysis estimates approximately \$36.6 billion in forgone truck trade in El Paso County in 2036 alone, representing 28.6% of El Paso County's total truck trade and 11.5% of Texas's truck trade. This distinction is important when interpreting the substantially different magnitudes of the trade, economic impact, and tax estimates presented in the report.

The economic impact analysis of forgone truck trade estimates economic losses of 16,655 job-years, \$931.8 million in labor income, \$3.5 billion in output, and \$9.7 million in taxes for El Paso County between 2028 and 2036. Given that this economic impact focuses on El Paso County, we also estimated that, over the 2028–2036 period, the modeled redistribution of BOTA commercial traffic would result in a \$19.8 billion gain in truck trade at the Santa Teresa PoE.

When Components A, B, and C are considered together, the analysis estimates a net reduction of 9,529 job-years, \$2.3 billion in economic output, \$600.7 million in labor income, and \$7.9 million in taxes in El Paso County over the 2028–2036 study period. On an annual average basis, these impacts correspond to losses of 1,059 jobs, \$66.7 million in labor income, \$260 million in economic output, and \$878,864 in El Paso County tax revenue over the 2028–2036 study period.

The analysis also identifies corresponding tax implications, which vary by jurisdiction and year. The timing of these economic gains and economic losses is central to the interpretation of the net economic impact. Economic gains associated with construction are temporary and concentrated within the 2028–2031 construction period, while the estimated economic gains associated with additional noncommercial crossings and economic losses associated with forgone truck trade extend beyond project completion. However, under the assumptions applied in this study, the longer-term modeled economic losses associated with commercial freight redistribution exceed the quantified economic gains associated with construction and additional noncommercial crossings, resulting in a negative estimated net economic impact over the study period. As with other economic impact assessments, these estimates are subject to methodological and data limitations. These limitations and the assumptions underlying the analysis are documented in the corresponding methodology and limitations sections of the report.

Separate from the net economic impact assessment, the second analytical area evaluates potential changes in logistics costs associated with the cessation of commercial traffic at BOTA. The logistics cost analysis uses information from participating firms within or directly connected to the logistics and transportation industry that provided the operational and cost data required for the assessment. By comparing estimated logistics costs under continued commercial operations at BOTA with estimated costs under the commercial-traffic cessation scenario, the analysis estimates the potential annual change in round-trip logistics costs between El Paso County or Doña Ana County and Ciudad Juárez. Under the modeled scenario, logistics costs to firms are estimated to increase by an additional \$79.1 million, or 17.8%, per year across the Paso del Norte region.⁶

The third analytical area consists of business survey responses and self-selected follow-up interviews. Surveys were developed and distributed to businesses throughout the Paso del Norte region, including businesses directly and indirectly connected to cross-border trade. Survey responses provide evidence regarding how participating businesses anticipate adjusting routes, operations, staffing, customer relationships, and supply chains if commercial traffic is no longer processed through BOTA. Self-selected follow-up interviews provide additional firm-level context and support the development of the case studies included in the report. Because participation in the survey and follow-up interviews was voluntary and the case-study participants were self-selected, these responses should not be interpreted as statistically representative of all businesses in El Paso County or the Paso del Norte region. Instead, they provide field-based evidence of the operational channels through which changes in commercial crossing patterns may affect individual firms. For instance, surveyed firms reported that, if commercial traffic at BOTA ceased, most would re-route the majority (over 75%) of their cargo through the Ysleta-Zaragoza PoE. However, responses varied across firms, with some indicating that they would pursue alternative courses of action. Among businesses directly connected to cross-border trade, 11.8% reported that they would consider relocating following the cessation of commercial traffic at BOTA, a proportion that closely aligns with the 10.9% leakage estimate used in the Economic Impact section of the report.

These findings do not constitute an evaluation of the policy merits of the proposed modernization, an assessment of its environmental benefits or costs, or a recommendation regarding the selected GSA alternative. Rather, this report provides an independent, scenario-based assessment of economic and trade-related effects that were not previously considered together within a single net economic impact framework. The analysis is intended to provide decision-makers, businesses, stakeholders, and the public with additional information for evaluating the proposed modernization within the broader economic and transportation context of El Paso County and the Paso del Norte region.

⁶ Values are presented in constant 2025 U.S. dollars.

i. Key Takeaways

U.S. - Mexico

POSITIVE RELATIONSHIP BETWEEN TRADE & ECONOMIC GROWTH

A 1% increase in the trade-to-GDP ratio is associated with a 0.47-percentage-point increase in GDP growth (Were, 2015).

EMPLOYMENT SYMBIOSIS AT THE U.S.-MEXICO BORDER

A 10% increase in export manufacturing in a Mexican border city is associated with a 1.1% to 2% increase in employment in its counterpart U.S. city (Hanson, 2001).

U.S.-MEXICO BORDER TRUCK TRADE STRENGTHENED

U.S.-Mexico border truck trade strengthened, with exports reaching \$240.9B (+2.5%) and imports reaching \$438.2B (+12.7%), while truck trade along the U.S.-Canada border declined.*

**Reporting period: June 2024-May 2025 to June 2025-May 2026. Values in billions are expressed as B.*

PDN

PDN WAS THE ONLY REGION REPORTING TRUCK EXPORT GROWTH (+23.2%)

PdN was the only U.S.-Mexico border region to record truck export growth, increasing by \$13.1B (23.2%), accounting for \$69.9B.*

**PdN stands for the Paso del Norte region. Values in billions are expressed as B. Values in millions are expressed as M. Reporting period: June 2024-May 2025 to June 2025-May 2026.*

PDN'S TRUCK EXPORTS ARE HIGHLY CONCENTRATED IN TECHNOLOGY-RELATED COMMODITIES (73.2%)

PdN's truck exports are highly concentrated in technology-related commodities, with computer-related and electrical machinery accounting for almost three-fourths (73.2%) of total exports, compared to 37.4% in Laredo and 29.4% in San Diego.*

** PdN stands for the Paso del Norte region. Reporting period: June 2024-May 2025 to June 2025-May 2026.*

PDN RECORDED STRONGEST TRUCK IMPORT GROWTH (+28.9%)

PdN led all major U.S.-Mexico border regions in truck import growth, increasing by \$25.5B (28.9%) to \$113.7B.*

** PdN stands for the Paso del Norte region. Values in billions are expressed as B. The report examines three U.S.-Mexico border trade regions selected based on their trade activity: The Laredo region comprises the Laredo PoE in TX; the Paso del Norte region comprises the Bridge of the Americas (BOTA), Tornillo, and Ysleta PoEs in TX and Santa Teresa PoE in NM; and the San Diego region comprises the Otay Mesa, San Ysidro, and Tecate PoEs in CA. Reporting period: June 2024-May 2025 to June 2025-May 2026.*

PDN WAS THE ONLY REGION SHOWING NORTHBOUND COMMERCIAL TRUCK TRAFFIC GROWTH (+3.5%)

PdN was the only border region to record northbound commercial truck traffic growth, increasing 3.5% to 1M crossings, while declining in Laredo and San Diego.*

** PdN stands for the Paso del Norte region. The report examines three U.S.-Mexico border trade regions selected based on their trade activity: The Laredo region comprises the Laredo PoE in TX; the Paso del Norte region comprises the Bridge of the Americas (BOTA), Tornillo, and Ysleta PoEs in TX and Santa Teresa PoE in NM; and the San Diego region comprises the Otay Mesa, San Ysidro, and Tecate PoEs in CA. Reporting period: May 2024-April 2025 to May 2025-April 2026.*

BOTA

BOTA RANKED SECOND IN COMMERCIAL TRUCK CROSSING GROWTH

BOTA recorded the second-largest increase in northbound commercial truck crossings among major U.S.-Mexico border PoEs by adding 31.7K crossings, reaching 173.2K.*

**BOTA stands for Bridge of the Americas. Values in thousands are expressed as K. Reporting period: May 2024-April 2025 to May 2025-April 2026.*

BOTA'S MODERNIZATION INTENDS TO EXPAND PASSENGER PROCESSING FACILITIES & CEASE COMMERCIAL TRAFFIC

GSA has progressed on a multilevel modernization of BOTA within the existing port boundaries, which includes expanding passenger and pedestrian processing facilities, limiting land acquisition, and eliminating all commercial cargo operations at the facility.*

**BOTA stands for Bridge of the Americas.*

BOTA'S COMMERCIAL HOURS OF OPERATION PROGRESSIVELY REDUCED

According to CBP records, since 2020, BOTA's commercial hours of operation have been progressively reduced. More than half of the survey respondents' firms report they would increase their use of BOTA if commercial hours were extended.*

**BOTA stands for Bridge of the Americas.*

BOTA CONSTRUCTION PHASE MAY GENERATE 3.1K JOB-YEARS, \$616.8M IN OUTPUT & \$1.8M IN TAXES

According to GSA's estimated \$400-\$460M construction budget for the BOTA modernization project for the 2028-2031 period, estimates indicate that this phase is estimated to support 3.1K job-years, \$202.9M in labor income, \$616.8M in output, and \$1.8M in taxes in El Paso County.*

**BOTA stands for Bridge of the Americas. Values in millions are expressed as M.*

ECONOMIC IMPACT

ESTIMATED LEAKAGE & REDISTRIBUTION RATES

The cessation of commercial traffic at BOTA may result in an estimated 10.9% regional traffic leakage, with the remaining commercial crossings redistributed to Ysleta (64.3%), Santa Teresa (34.4%), and Tornillo (1.3%).*

**BOTA stands for Bridge of the Americas.*

SANTA TERESA MAY GAIN \$19.8B IN TRUCK TRADE DUE TO BOTA'S REDISTRIBUTED TRAFFIC

Over the 2028-2036 period, BOTA commercial traffic cessation may cause a \$19.8B truck trade gain for the Santa Teresa PoE from BOTA's redistributed traffic.*

**BOTA stands for Bridge of the Americas. Values in billions are expressed as B.*

FORGONE TRUCK TRADE VALUE MAY REACH \$36.6B BY 2036 WITH BOTA'S MODERNIZATION

In 2028, forgone truck trade in El Paso County PoEs is estimated at \$15.2B and projected to reach \$36.6B by 2036, representing 28.6% of El Paso County's total truck trade and 11.5% of Texas' truck trade.*

**BOTA stands for Bridge of the Americas. Values in billions are expressed as B.*

ECONOMIC IMPACT (CONT.)

BOTA'S CESSATION OF COMMERCIAL TRAFFIC MAY CAUSE A LOSS OF 16.7K JOB-YEARS, \$3.5B IN OUTPUT, AND \$9.7M IN TAXES

The economic impact of the cessation of BOTA's commercial traffic estimates a loss of 16.7K job-years, \$931.8M in labor income, \$3.5B in output, and \$9.7M in taxes for El Paso County between 2028 and 2036.*

**BOTA stands for Bridge of the Americas. Values in billions are expressed as B. Values in millions are expressed as M. Values in thousands are expressed as K.*

ADDITIONAL NONCOMMERCIAL TRAFFIC AT BOTA MAY GENERATE 4K JOB-YEARS & \$514.4M IN OUTPUT

According to GSA results, additional noncommercial crossings following BOTA's modernization would support 4K job-years, \$128.1M in labor income, and \$514.4M in output in El Paso County over the review period 2028-2036.*

**Available data from the Metropolitan Planning Organization (MPO) estimates for noncommercial traffic with BOTA's modernization yielded no economic gains, as crossing estimates remained unchanged. To account for potential economic gains following modernization, the Institute applied the framework and results developed by the GSA. Review period 2028-2036. BOTA stands for Bridge of the Americas. Values in millions are expressed as M. Values in thousands are expressed as K.*

ECONOMIC GAINS FROM BOTA'S EXPANSION MAY BE TEMPORARY; TRADE ECONOMIC LOSSES MAY BE PERMANENT

Overall, the anticipated net economic impact (accounting for construction and additional noncommercial traffic gains and commercial traffic trade losses) of the BOTA modernization project in El Paso County from 2028 to 2036 is a loss of 9.5K job-years, \$2.3B in output, and \$7.9M in taxes. Results indicate that the project's economic gains are temporary, while gains from additional noncommercial crossings and losses from forgone truck trade are permanent.*

**BOTA stands for Bridge of the Americas. Values in billions are expressed as B. Values in millions are expressed as M. Values in thousands are expressed as K.*

ESTIMATED ADDITIONAL ANNUAL LOGISTICS COSTS OF \$79.1M FOR PDN FIRMS

Using testimonial-based data, this analysis estimates that the cessation of commercial traffic at BOTA may increase wait times at Ysleta and Santa Teresa and raise annual logistics costs across PdN by an estimated \$79.1M (17.8%) in 2025 dollars.*

**PdN stands for the Paso del Norte region. BOTA stands for Bridge of the Americas. Values in millions are expressed as M.*

SURVEY RESPONSES

POTENTIAL INCREASE IN BOTA USE WITH RESTORATION OF 12-HOUR DAILY OPERATIONS

Over 55% of firms noted they would increase their use of the bridge if commercial hours of operation were extended.*

**BOTA's commercial operating hours were reduced beginning in 2020. Before the reduction, the port processed commercial traffic for 12 hours per weekday, from 6:00 a.m. to 6:00 p.m., with Saturday operations from 6:00 a.m. to 2:00 p.m. Beginning in 2020, weekday commercial operations were reduced to 6:00 a.m.-4:00 p.m., and Saturday operations were discontinued. Operating hours were subsequently reduced further to 6:00 a.m.-2:00 p.m. on weekdays.*

RELIABILITY & EFFICIENCY DRIVE FREIGHT DECISIONS

Among surveyed firms, reliable and predictable crossing times (57.9%) and fast border crossings (55.1%) were identified as the most important factors influencing cross-border freight operations.

SURVEY RESPONSES (CONT.)

MAJORITY OF SURVEYED FIRMS USE BOTA

More than 80% of surveyed firms use BOTA PoE for their northbound cross-border trade operations, while 70% use it for southbound operations.*

**BOTA stands for Bridge of the Americas.*

YSLETA-ZARAGOZA MAY ABSORB A MAJORITY OF DIVERTED TRUCKS

According to surveyed firms, if commercial traffic at BOTA ceased, most would re-route the majority (over 75%) of their cargo through the Ysleta-Zaragoza PoE.*

** BOTA stands for Bridge of the Americas.*

POTENTIAL DIVERSION OF COMMERCIAL FREIGHT

Approximately one-quarter of surveyed firms indicated that following the cessation of commercial cargo operations at BOTA, they may redirect some or all their cargo through ports of entry outside the PdN region.*

**PdN stands for the Paso del Norte region. BOTA stands for Bridge of the Americas.*

11.8% OF FIRMS MAY CONSIDER RELOCATING OPERATIONS OUTSIDE THE PDN REGION

11.8% of surveyed firms indicated that they would consider relocating their operations outside the PdN region following the cessation of commercial traffic at BOTA.

**PdN stands for the Paso del Norte region. BOTA stands for Bridge of the Americas.*

BOTA COMMERCIAL TRAFFIC CESSATION MAY HAVE GREATER IMPACTS ON CROSS-BORDER FIRMS

Overall, survey results indicated that firms anticipate more operational and economic impacts from the cessation of commercial traffic at BOTA than businesses serving the broader local economy.*

**BOTA stands for Bridge of the Americas.*

**The Hunt Institute designed two separate surveys to assess the relationship between regional businesses and the four PoEs in the Paso del Norte Region. Survey 1 was distributed to firms engaged in cross-border trade across the following industries: manufacturing, transportation, warehousing, customs brokerage, and 3PL (logistics, transportation, warehousing, and/or inventorying). Survey 2 was distributed to businesses whose commercial activity is not directly associated with cross-border trade but may still be indirectly impacted by it.*

I. INTRODUCTION



Bridge of the Americas PoE located in El Paso, Texas

The Bridge of the Americas (BOTA) Land Port of Entry is part of an interconnected system of international crossings supporting the movement of goods and people throughout the Paso del Norte region. Located in El Paso, Texas, BOTA operates alongside the Tornillo-Guadalupe and Ysleta-Zaragoza land ports of entry in El Paso County, Texas, and the Santa Teresa Port of Entry in Doña Ana County, New Mexico.

The U.S. General Services Administration (GSA) is advancing a major modernization of BOTA. As part of the federal environmental review required under the National Environmental Policy Act (NEPA), GSA evaluated alternatives for modernizing the facility and documented their potential environmental, transportation, socioeconomic, and related effects. Following completion of that process, GSA issued a Record of Decision selecting Viable Action Alternative 4 for implementation. The selected alternative provides for a multilevel modernization of the facility, expansion and modernization of pedestrian and noncommercial vehicle facilities, and the elimination of commercial cargo operations at BOTA. Under GSA's current project schedule, construction is expected to begin in early 2028 and be completed in summer 2031. For purposes of this report, the selected alternative establishes the modernization and operational conditions under which the potential economic and trade-related effects are evaluated.

The Hunt Institute for Global Competitiveness was commissioned by the El Paso Chamber to conduct a comprehensive economic impact study focused on the potential economic and trade-related implications of the selected modernization alternative. Central to this study is an assessment of the net economic impact on El Paso County that considers economic gains associated with construction and additional noncommercial crossings, together with economic losses from forgone truck trade resulting from the cessation of commercial cargo operations at BOTA. The report addresses a separate economic research question from the environmental analysis supporting the modernization and does not replicate or independently evaluate that analysis. GSA's selected alternative and relevant supporting analyses are used as project conditions and analytical inputs where applicable.

BOTA operates within a broader regional transportation and economic system. Accordingly, the analysis considers the port relative to other commercial crossings serving the Paso del Norte region. The potential redistribution of commercial traffic depends on factors including historical crossing patterns, port operations, transportation connectivity, available infrastructure, travel distances, commodity flows, and firm-level routing decisions, among other considerations. Examining these relationships provides the context needed to assess how changes in BOTA's commercial operations could affect economic activity in El Paso County and freight movement across the broader Paso del Norte region.

This report evaluates these issues using complementary quantitative and qualitative methods. The analysis examines historical trade and crossing patterns, the regional economic and socioeconomic context, port operations and connectivity, comparable infrastructure disruptions, and potential redistribution of commercial traffic. Economic impact modeling is used to estimate leakage and the effects on employment, labor income, economic output, and, where possible, corresponding tax implications. A separate logistics-cost assessment evaluates potential changes in transportation and operational costs using data provided by participating firms, while firm and business surveys and case studies derived from self-selected follow-up interviews provide additional evidence on potential operational responses. Stakeholder-reported experiences are treated as complementary field evidence and are distinguished from observed data and model-based estimates.

Understanding the potential economic implications of the BOTA modernization depends in part on the role the crossing plays within a broader system of cross-border commerce. The analysis begins by establishing the scale, composition, and recent patterns of trade along the U.S.-Mexico border. This broader context provides a basis for evaluating the Paso del Norte region relative to other major commercial border regions and, subsequently, BOTA's role within the regional port of entry network. The sections that follow progressively narrow the analysis from U.S.-Mexico trade activity to the Paso del Norte region, individual ports of entry, and ultimately the economic and operational implications of the proposed BOTA modernization.

The Hunt Institute does not evaluate the policy merits of the selected GSA alternative, recommend a preferred modernization approach, or assess engineering or construction design decisions. Consistent with the scope of the study, the analysis is factual, neutral, and scenario-based, with modeled results interpreted in accordance with the assumptions, methodologies, data availability, and limitations documented throughout the report.

II. TRADE ACTIVITY AT THE U.S.-MEXICO BORDER

i. The U.S.-Mexico Border

The U.S.-Mexico border extends approximately 1,954 miles, connecting four U.S. states (California, Arizona, New Mexico, and Texas) with six Mexican states (Baja California, Sonora, Chihuahua, Coahuila, Nuevo León, and Tamaulipas), forming one of the busiest international borders in the world. The border serves as a critical corridor for international trade, manufacturing, tourism, and daily cross-border commuting. Along the border are 28 land PoEs that process commercial cargo, passenger vehicles, and pedestrians. These ports vary in size and function, with some primarily serving passenger vehicle traffic and pedestrians, while others function as regional commercial freight gateways. Of these 28 PoEs, 22 are equipped to process commercial cargo. The Paso del Norte region has four PoEs that facilitate the movement of goods between the United States and Mexico: BOTA, Ysleta-Zaragoza, and Tornillo in Texas, and Santa Teresa in New Mexico.



Map 1. The U.S.-Mexico Border

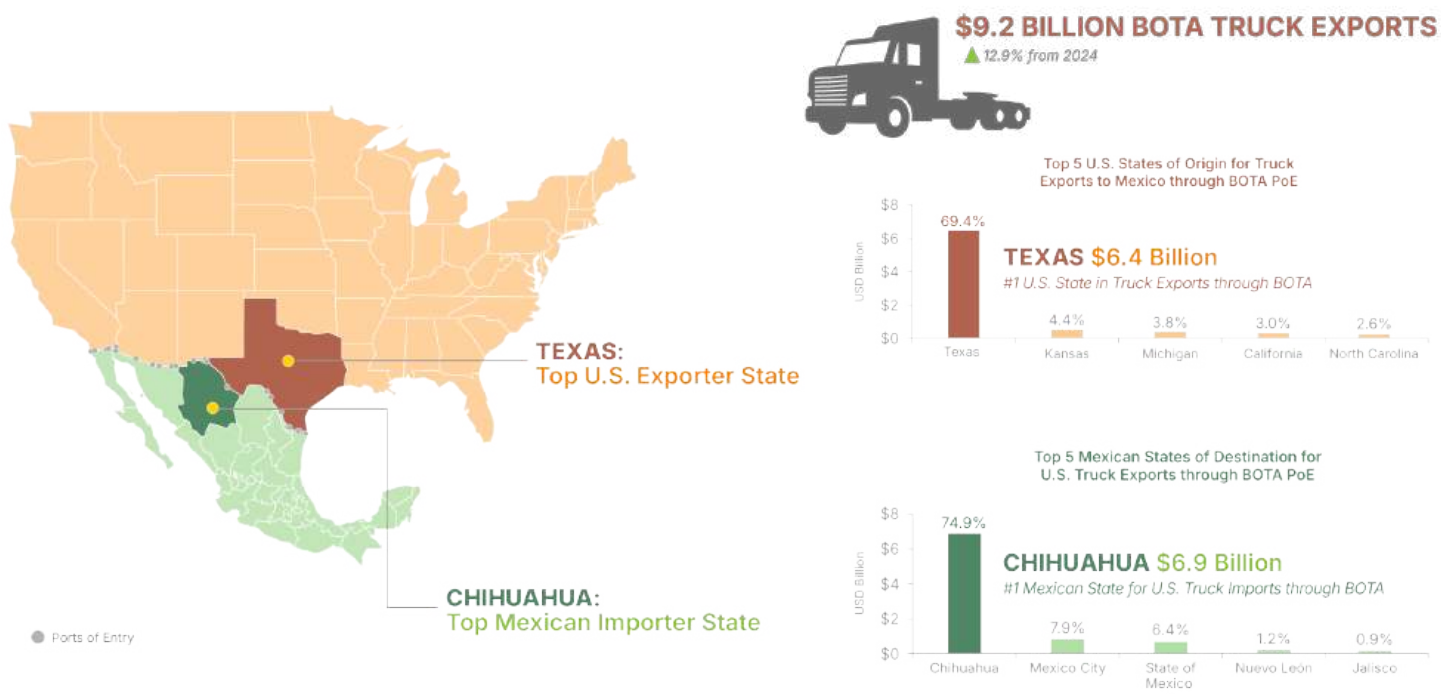


- | | | | |
|---------------------|-----------------|--------------------|------------------------------|
| ● San Ysidro, CA | ● San Luis, AZ | ● Columbus, NM | ● Bridge of the Americas, TX |
| ● Otay Mesa, CA | ● Lukeville, AZ | ● Santa Teresa, NM | ● Ysleta, TX |
| ● Calexico, CA | ● Sasabe, AZ | | ● Tornillo, TX |
| ● Calexico-East, CA | ● Nogales, AZ | | ● Presidio, TX |
| ● Tecate, CA | ● Naco, AZ | | ● Del Rio, TX |
| ● Andrade, CA | ● Douglas, AZ | | ● Eagle Pass, TX |
| | | | ● Laredo, TX |
| | | | ● Roma, TX |
| | | | ● Rio Grande City, TX |
| | | | ● Hidalgo, TX |
| | | | ● Progreso, TX |
| | | | ● Brownsville, TX |

Source: The Hunt Institute.

ii. BOTA as a Connector for Texas and Chihuahua

Figure 1. U.S. Truck Exports to Mexico through BOTA by State of Origin & Destination, 2025



Note: Top U.S. exporter and Mexican importer states are based on trade across all modes of transportation.
Source: The Hunt Institute using data from the U.S. Bureau of Transportation Statistics.

In 2025, Texas and Chihuahua were the leading exporting states in their respective countries: Texas exported \$448.2 billion, accounting for 21.6% of U.S. exports, and Chihuahua exported \$109.2 billion, representing 18.2% of Mexico's total exports.

The Paso del Norte region, with four commercial PoEs, is strategically positioned to facilitate trade between Texas and Chihuahua, the leading exporting states in the United States and Mexico, respectively. This geographic proximity, combined with the region's cross-border transportation infrastructure, supports the movement of goods and integrated supply chains between the two countries.

Figure 1 illustrates the geographic distribution of U.S. truck exports to Mexico through the BOTA by state of origin and destination in 2025. Located within the Paso del Norte region, BOTA serves as an important commercial connection between Texas and Chihuahua, facilitating the movement of goods across the U.S.-Mexico border.

In 2025, BOTA processed approximately \$9.2 billion in U.S. truck exports to Mexico, representing a 12.9% increase from 2024. Texas was the dominant state of origin, accounting for \$6.4 billion, or 69.4%, of truck exports through BOTA. On the Mexican side, Chihuahua was the leading destination, receiving approximately \$6.9 billion, or 74.9%, of U.S. truck exports through the port.



III. LITERATURE REVIEW

i. Trade and Economic Growth

The positive relationship between trade and economic growth has been well-documented over the years.

Dollar (1992) studied the effects of economic growth on trade openness (with low levels of trade protectionism and high real exchange rate volatility to incentivize trade).⁷ Dollar's findings suggest that a more outward-oriented trade policy could increase per capita GDP growth by 1.5% to 2.1%.

Similarly, Sachs, Warner, Aslund, and Fischer (1995) assessed the effects that global integration has on economic growth.⁸ Their analysis found that countries with greater international trade openness experienced faster economic growth than those with greater protectionism when a country had stable macroeconomic policies, structural policies, and institutions.

Research by Frankel and Romer (1999) analyzed the effects of trade on income by considering countries' geographic characteristics (such as distance from other countries, size, area, landlocked status, and shared borders).⁹ Their results show that by stimulating the accumulation of human and physical capital and increasing output, a one-percentage-point increase in the trade-to-GDP ratio raises income per person by at least 0.5%.

Dollar and Kraay (2004) studied the relationship between trade liberalization and growth in GDP and poverty.¹⁰ Their results found that the per capita growth rate increased in globalized countries and that "greater globalization is a force for poverty reduction".

More recently, Were (2015) examined the effects of trade on economic growth and investment across 85 countries categorized as developed, developing, and least developed.¹¹ Their results suggest that a 1% increase in the trade-to-GDP ratio raised growth by 0.47 percentage points. Exports, however, had a stronger effect than imports.

Stone and Shepherd (2011) examined whether firms benefit from importing intermediate and capital goods by improving productivity and innovation.¹² Their results suggest that total factor productivity (TFP) increased by 0.3% for every 1% increase in importers' intermediate-input shares; similarly, every 1% increase in imported capital goods increased TFP by 0.2%. Finally, their results show that importing intermediate goods increased firms' investment in research and development.

7 D. Dollar, "Outward-Oriented Developing Economies Really Do Grow More Rapidly: Evidence from 95 LDCs, 1976-1985," *Economic Development and Cultural Change*, vol. 40, issue 3 (1992): 523-44, https://econpapers.repec.org/article/ucpecdecc/v_3a40_3ay_3a1992_3ai_3a3_3ap_3a523-44.htm

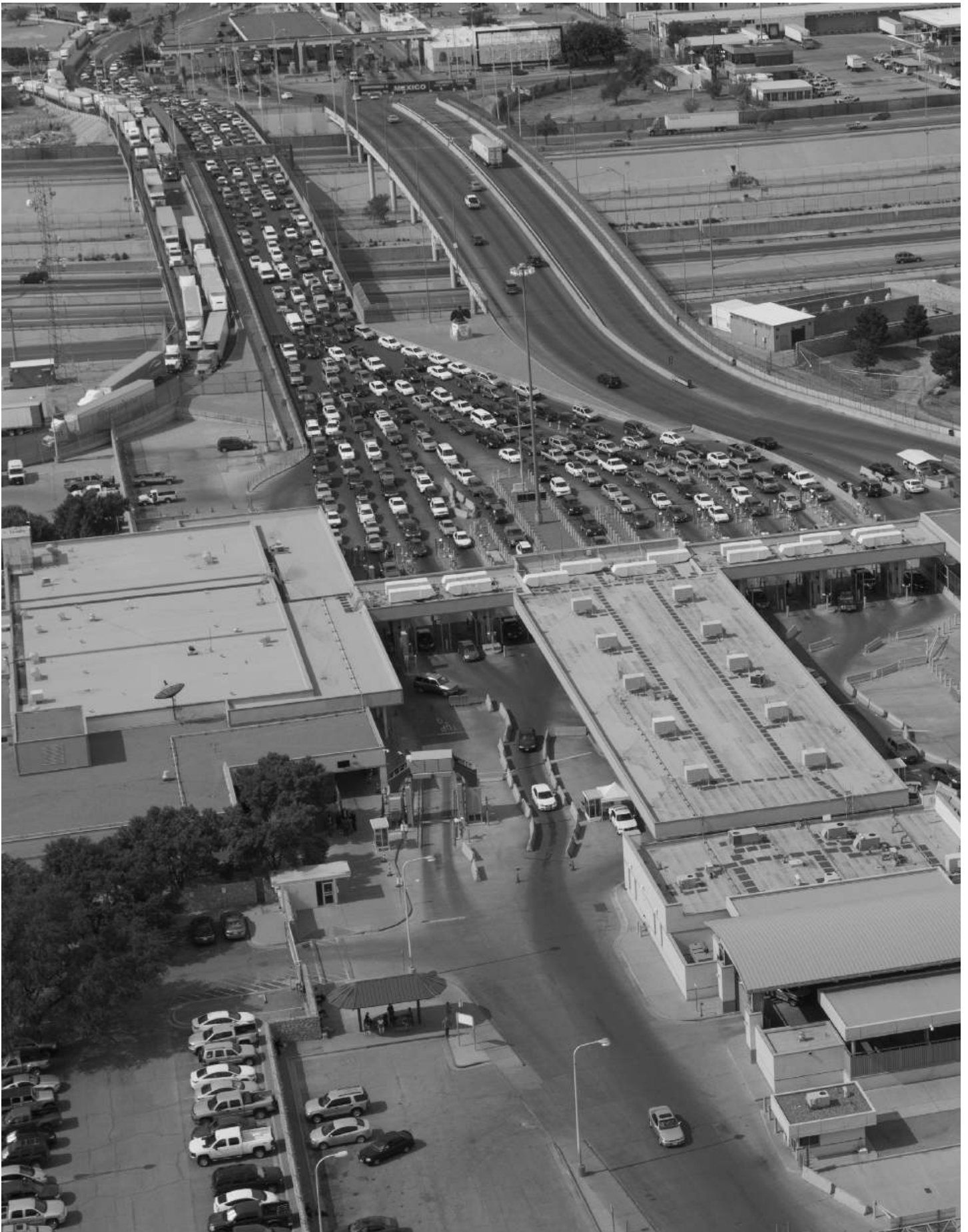
8 J. Sachs, A. Warner, A. Aslund, and S. Fischer, "Economic Reform and the Process of Global Integration," *Brookings Papers on Economic Activity* (1995): 1-118, <https://doi.org/10.2307/2534573>

9 J. A. Frankel and D. H. Romer, "Does Trade Cause Growth?," *American Economic Review*, vol. 89, no. 3, (June 1999): 379-99, <https://doi.org/10.4324/9781315254166-11>

10 D. Dollar and A. Kraay, "Trade, Growth, and Poverty," *The Economic Journal*, vol. 114, no. 493 (Feb., 2004): F22-F49, <https://doi.org/10.1111/j.0013-0133.2004.00186.x>

11 M. Were, "Differential effects of trade on economic growth and investment: A cross-country empirical investigation," *Journal of African Trade*, vol. 2, issues 1-2 (Dec., 2015): 71-85, <https://doi.org/10.1016/j.joat.2015.08.002>

12 S. Stone and B. Shepherd, "Dynamic Gains from Trade: The Role of Intermediate Inputs and Equipment Imports," *OECD Trade Policy Papers*, No. 110 (Oct., 2011): <https://doi.org/10.1787/5kgf17f17ks1-en>



Bridge of the Americas PoE located in El Paso, Texas

ii. El Paso and Ciudad Juárez

El Paso and Ciudad Juárez are cities united not only by their geographic proximity and cultural exchange, but also by their shared history. Economic exchange and dependence, largely shaped by international trade and the maquiladora industry, have been studied.

A maquiladora is an assembly or manufacturing firm located in Mexico that benefits from special tax and tariff breaks, with specific industries operating maquiladoras potentially receiving special authorization from the Mexican and U.S. governments (such as defense, radioactive materials, petroleum, etc.).¹³

Fullerton (2003) states that since the 1960s, the expansion of the maquiladora industry has strengthened and accelerated the industrial linkages between the U.S. and Mexico and their “intra-industry trade.”¹⁴ Some important cross-border intra-industry trade effects include improvements in performance through innovation, product specialization, and the enabling of economies of scale, as well as increases in labor returns. Fullerton also argues that cross-border industrial linkages impact a wide range of regional economic outcomes. Specifically, in border city pairs (or sister cities), complementary growth effects have been documented: growth on one side of the border tends to spill over to the other.

Hanson (2001) examined whether integration between sister cities in the U.S. and Mexico contributed to economic growth in the U.S.-Mexico border region between 1975 and 1990.¹⁵ His results suggest that a 10% increase in export manufacturing in a Mexican border city leads to a 1.1% to 2% increase in employment in its counterpart U.S. city. Employment increases were stronger in industries related to trade: 2% to 2.7% in wholesale trade; 1.7% to 2.7% in transportation; 1.2% to 2.1% in manufacturing; and 1% to 1.8% in retail trade.

Cañas, Coronado, Gilmer, and Saucedo (2011) updated Hanson’s estimate with data from 1990 to 2006.¹⁶ Their results showed that a 10% increase in maquiladora production led to a 0.5% to 0.9% increase in employment in its counterpart U.S. city. More specifically, their results indicate that El Paso is the third-most-benefited city from an increase in Ciudad Juárez’s maquiladora activity, with a 2.8% increase in total employment for every 10% increase in maquiladora production and a 5.3% increase in transportation employment.

Similarly, Mollick, Cortez-Rayas, and Olivas-Moncisvais (2006) analyzed the relationship between maquiladora production in Ciudad Juárez and employment and wages in El Paso.¹⁷ Their findings show that a 10% increase in production in Ciudad Juárez maquiladoras increased El Paso’s government employment by 1.21% and total employment by 0.88%.

Finally, Gilmer and Coronado (2012) studied changes in per capita income in El Paso to understand the closure of its income gap with the U.S. and which sectors drove this convergence.¹⁸ Their results suggest that six industries related to cross-border trade (information, finance, real estate, professional services, management, and administrative services) were among the most important in driving per capita earnings gains in El Paso between 2001 and 2010.

The economic ties between El Paso and Ciudad Juárez extend beyond maquiladoras and trade. Mexican shoppers have historically accounted for between 10% and 15% of El Paso’s retail sales.¹⁹ Retail is the second-largest cluster in the El Paso metropolitan area, representing approximately 10% of its employment.

EL PASO EMPLOYMENT RISES WITH MAQUILADORA GROWTH

Federal Reserve Bank of Dallas, 2011

13 M. Stephenson, “Mexico’s Maquiladora Program: Challenges and Prospects,” 22 St. Mary’s L.J. (1991): <https://commons.stmarytx.edu/thestmaryslawjournal/vol22/iss3/3>

14 T. Fullerton, “Recent trends in border economics,” *The Social Science Journal*, vol. 4, issue 4 (2003): 583-92, [https://doi.org/10.1016/S0362-3319\(03\)00070-3](https://doi.org/10.1016/S0362-3319(03)00070-3)

15 G. H. Hanson, “U.S.-Mexico Integration and Regional Economies: Evidence from Border-City Pairs,” *Journal of Urban Economics*, vol. 50, issue 2 (2001): 259-87, <https://doi.org/10.1006/juec.2001.2217>

16 J. Cañas, R. A. Coronado, R. W. Gilmer, and E. Saucedo, “The Impact of the Maquiladora Industry on U.S Border Cities,” *The Federal Reserve Bank* (2011): <https://www.dallasfed.org/~media/documents/research/papers/2011/wp1107.pdf>

17 A.V. Mollick, A. Cortez-Rayas, and R.A. Olivas-Moncisvais, “Local labor markets in U.S.-Mexican border cities and the impact of maquiladora production,” *The Annals of Regional Science*, vol. 40 (2006): 95-116, <https://doi.org/10.1007/s00168-005-0031-9>

18 Federal Reserve Bank of Dallas, El Paso Branch. *Crossroads: Economic Trends in the Desert Southwest*, issue 2 (Jul., 2012): <https://fraser.stlouisfed.org/title/6349/item/607488>

19 Dallas Federal Reserve Bank – “El Paso: Gateway to Mexico relies on commerce, government,” (n.d.): *El Paso: Gateway to Mexico relies on commerce, government* – [Dallasfed.org](https://dallasfed.org)

iii. Economic Impact of Bridge Closures

Research demonstrates that the closure or disruption of major transportation corridors can generate economic impacts that extend well beyond the directly affected area. Studies examining bridge closures and border blockades consistently find that the magnitude of these impacts depends on the strategic importance of the crossing, the degree of dependence on the affected route, the availability of alternative transportation corridors, and the duration of the disruption. All cases studied in this section were chosen for their geographic location, the community's ties to trade and manufacturing, and their importance to the supply chain.

The 2023 closure of the Washington Bridge in Rhode Island illustrates the regional effects of losing a heavily traveled transportation corridor. Using the U.S. Bureau of Economic Analysis' Regional Input–Output Modeling System (RIMS II), researchers estimated approximately \$114 million in losses to the state's hospitality sector during the first year of the closure and projected cumulative impacts of nearly \$748 million through 2029. Although some economic activity shifted to neighboring counties, the overall findings indicated that prolonged infrastructure disruptions can reduce business activity, employment, and regional economic output, with recovery to pre-closure levels often taking years.²⁰

Similarly, the 2022 blockade of the Ambassador Bridge between Windsor, Ontario, and Detroit, Michigan, showed the vulnerability of highly integrated manufacturing supply chains to interruptions at a single international crossing. During the six-day blockade, cross-border freight movements were effectively halted, resulting in estimated daily losses of \$150 million to \$400 million. Automotive manufacturers on both sides of the border temporarily reduced or suspended production due to shortages of just-in-time components.²¹

Evidence from outside North America further underscores the importance of transportation connectivity. Following the 2015–2016 border blockade between Nepal and India, Nepal experienced declines in imports and exports, leading to widespread fuel shortages, temporary industrial shutdowns, higher inflation, and slower economic growth. While Nepal's circumstances differ considerably due to its landlocked geography and dependence on a single trade partner, the case illustrates how limited route optionality can amplify the economic consequences of border disruptions.²²

The collapse of the Francis Scott Key Bridge in Baltimore in 2024 provides another example of the broad economic effects associated with the loss of critical transportation infrastructure. The bridge's collapse temporarily blocked maritime access to the Port of Baltimore, diverting cargo to other ports and increasing transportation costs and delivery times. The disruption resulted in estimated losses of approximately \$15 million per day and affected industries beyond Maryland through supply chain adjustments and higher logistics costs.²³

Although each case differs in its geographic setting, transportation mode, and duration, the literature identifies several factors that influence economic outcomes, including traffic concentration, dependence on a single corridor, availability of alternative routes, and the speed of operational and policy responses.

20 Salve Regina University and Rhode Island Hospitality Association, *Washington Bridge Closure Economic Impact Study (Fall 2024)* (Providence, RI, 2024).

21 Paul S. Rouleau, *Report of the Public Inquiry into the 2022 Public Order Emergency*, vol. 5, Policy Papers (Ottawa: Public Order Emergency Commission, 2023); Public Order Emergency Commission, *Institutional Report – Global Affairs Canada* (Ottawa: Government of Canada, 2022).

22 World Bank, *Nepal Development Update: Development Amidst Disturbances* (Washington, DC: World Bank Group, 2016).

23 U.S. Chamber of Commerce, *How the Baltimore Bridge Collapse Affects Business and the Economy* (2024).

IV. CROSS-BORDER TRADE AND CROSSINGS



* The export “*pedimento*” identifies the specific port of export. If the truck cannot pass through that port due to congestion or reduced operating hours, the customs broker may need to amend the customs documentation before the shipment can be processed at a different port of entry.

** ANAM stands for the *Agencia Nacional de Aduanas de México* (National Customs Agency of Mexico). It is the federal government body created in January 2022 to organize, direct, and control customs and border inspection services, replacing the old customs administration under the SAT.

*** DODA stands for *Documento de Operación para Despacho Aduanero*.



Tijuana-San Ysidro PoE located in San Diego, California

The U.S.-Mexico and U.S.-Canada borders serve as critical gateways for land trade between the United States and its two largest neighboring trading partners. From June 2025 through May 2026, U.S. truck exports through U.S.-Mexico border PoEs totaled \$240.9 billion, accounting for 55% of combined truck exports through the U.S.-Mexico and U.S.-Canada borders. This represented a 2.5% increase compared with the preceding 12-month period. In contrast, truck exports through the U.S.-Canada border declined by 4.7% over the same period.

A similar pattern was observed for imports. From June 2025 through May 2026, U.S. truck imports from Mexico through U.S.-Mexico border PoEs totaled \$438.2 billion, representing 70.8% of combined truck imports through the U.S.-Mexico and U.S.-Canada borders. Truck imports through the U.S.-Mexico border increased by 12.7% compared with the preceding 12-month period, while imports through the U.S.-Canada border declined by 7.3%.

U.S.-MEXICO BORDER TRUCK TRADE STRENGTHENED

Map 2. Selected Major Border Regions Along the U.S.-Mexico Border



Note: The Laredo region comprises the Laredo PoE in TX; the Paso del Norte region comprises the Bridge of the Americas (BOTA), Tornillo, and Ysleta PoEs in TX and Santa Teresa PoE in NM; and the San Diego region comprises the Otay Mesa, San Ysidro, and Tecate PoEs in CA.

Source: The Hunt Institute.

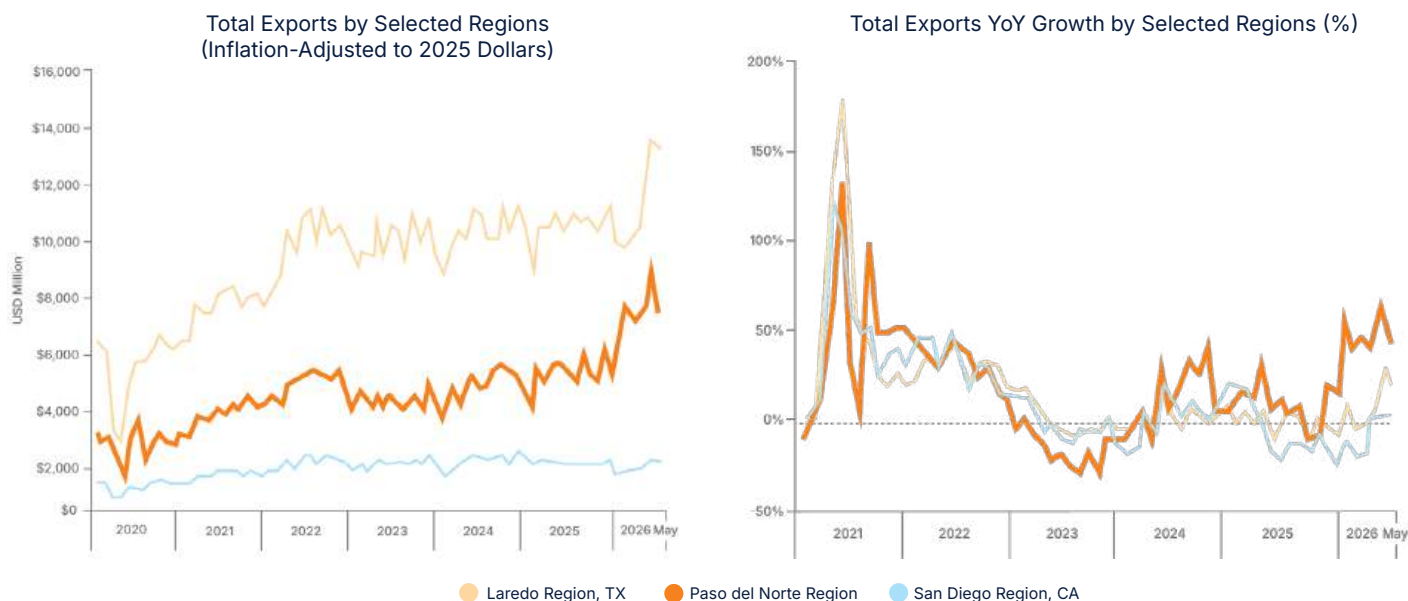
i. Cross-Border Trade and Crossings through the Selected Major Border Regions

This section examines three major U.S.-Mexico border trade regions selected based on their trade activity: Laredo, San Diego, and Paso del Norte. These regions were selected because they represent the nation's main commercial gateways for cross-border trade and freight movement. For the purposes of this analysis, the Laredo border region consists of the Laredo PoE, the San Diego border region includes the San Ysidro, Otay Mesa, and Tecate PoEs, and the Paso del Norte region includes BOTA, Tornillo, Ysleta, and Santa Teresa PoEs.²⁴

²⁴ The U.S. Census Bureau and the U.S. Bureau of Transportation Statistics report the Colombia Solidarity Bridge and the World Trade Bridge as the Laredo PoE. Throughout this report, both PoEs will be addressed together following their format.

a. Trade by Selected Major Border Regions

Figure 2. Total Exports & Growth by Selected Major Border Regions



Note: The Laredo region comprises the Laredo PoE in TX; the Paso del Norte region comprises the Bridge of the Americas (BOTA), Tornillo, and Ysleta PoEs in TX and Santa Teresa PoE in NM; and the San Diego region comprises the Otay Mesa, San Ysidro, and Tecate PoEs in CA.

Source: The Hunt Institute using data from the Bureau of Transportation Statistics.

Exports

Figure 2 compares inflation-adjusted total export values (2025 dollars) and year-over-year (YoY) export growth for the three leading selected U.S.–Mexico border regions, Laredo, Paso del Norte, and San Diego, from January 2020 through May 2026. While Laredo continues to process the largest total export value, the Paso del Norte region has experienced the strongest sustained growth.

The inflation-adjusted total exports through the Paso del Norte region more than doubled, rising from approximately \$3.1 billion in January 2020 to nearly \$7.5 billion by May 2026. Over this period, Paso del Norte recorded the strongest total export growth among the three major border regions, increasing 138.8%, compared with 108.3% in Laredo and 60.9% in San Diego. After a temporary slowdown in 2022 and early 2023, export activity resumed its steady upward trend in 2024 and continued to grow through May 2026.

After the post-pandemic recovery period, when all major border regions experienced elevated YoY growth rates, Paso del Norte consistently outperformed Laredo and San Diego during the most recent reporting periods. By April 2026, the Paso del Norte region recorded YoY total export growth approaching 60%, exceeding the growth observed at the other leading border regions.

PDN OUTPACED LAREDO & SAN DIEGO IN TOTAL EXPORT YOY GROWTH

Figure 3. Truck Exports by Selected Major Border Regions (USD Billion)



Note: Changes between two 12-month periods. Figures shown for the periods of June 2024-May 2025 and June 2025-May 2026 are cumulative; the comparison of changes between the two periods reflects the difference between these accumulated figures. The Laredo region comprises the Laredo PoE in TX; the Paso del Norte region comprises the Bridge of the Americas (BOTA), Tornillo, and Ysleta PoEs in TX and Santa Teresa PoE in NM; and the San Diego region comprises the Otay Mesa, San Ysidro, and Tecate PoEs in CA.

Source: The Hunt Institute using data from the U.S. Bureau of Transportation Statistics.

Figure 3 compares the cumulative truck export value for the three leading U.S.-Mexico border regions during the June 2024-May 2025 and June 2025-May 2026 reporting periods. Among the three regions, Paso del Norte was the only region to record growth in truck export value during the study period.

Truck exports through the Paso del Norte region increased from \$56.8 billion to \$69.9 billion, a \$13.1 billion (23.2%) increase between these periods. This was by far the strongest growth among the three leading border regions and reflects the continued expansion of manufacturing activity in the El Paso-Ciudad Juárez area. The increase also reflects higher volumes of high-value manufactured goods moving through the region, particularly those associated with the automotive, electronics, medical devices, and advanced manufacturing sectors.

In contrast, truck exports through Laredo declined from \$106.7 billion to \$106.2 billion, a decrease of \$0.5 billion (~0.5%) during the same period. San Diego experienced the largest decline among the three regions, with truck exports falling from \$23.6 billion to \$20.1 billion, a reduction of \$3.5 billion (-14.7%).



**PDN WAS THE ONLY REGION TO
RECORD TRUCK EXPORT GROWTH**

Figure 4. Top 5 Truck Commodities Exported through Selected Major Border Regions, 2025



Note: The Paso del Norte region comprises the Bridge of the Americas, the Santa Teresa, Tornillo, and Ysleta ports of entry. The Laredo region comprises the Laredo PoE in TX; the Paso del Norte region comprises the Bridge of the Americas (BOTA), Tornillo, and Ysleta PoEs in TX and Santa Teresa PoE in NM; and the San Diego region comprises the Otay Mesa, San Ysidro, and Tecate PoEs in CA.

Source: The Hunt Institute using data from the U.S. Bureau of Transportation Statistics.

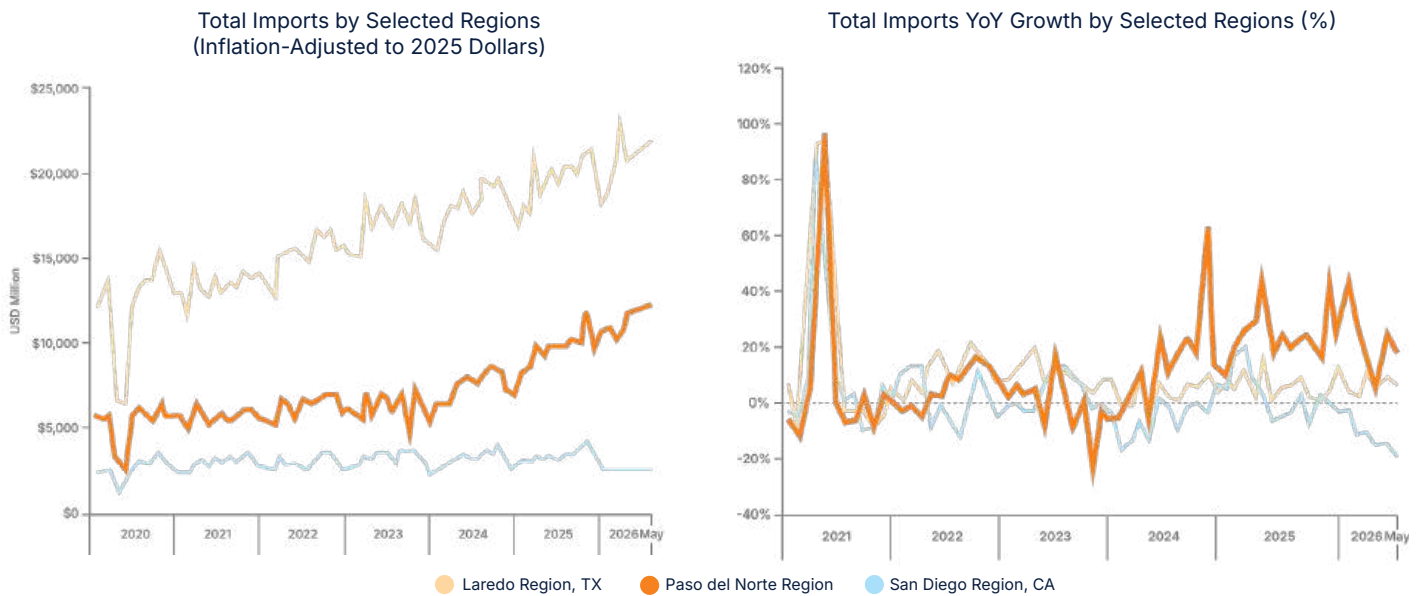
Figure 4 compares the five leading truck export commodities across the Paso del Norte, Laredo, and San Diego regions in 2025. While computer-related machinery and parts and electrical machinery, equipment, and parts ranked as the two leading truck export commodity groups across all three regions, the Paso del Norte region exhibited a significantly higher concentration in these two categories.

In 2025, computer-related machinery and parts represented the largest truck export commodity through the Paso del Norte region, totaling \$22.4 billion, or 37.6% of the region's truck exports. Electrical machinery, equipment, and parts followed closely at \$21.2 billion, accounting for 35.6%. Together, these two commodity groups represented nearly three-quarters of the region's truck exports. By comparison, the two leading commodity groups accounted for 37.4% of truck exports through Laredo and 29.4% through San Diego, highlighting Paso del Norte's comparatively high concentration in electronics and electrical machinery exports.

The remaining leading truck export commodities in the Paso del Norte region included plastics and articles (\$3.3 billion), measuring and testing instruments (\$2.1 billion), and vehicles other than railway (\$0.9 billion). Collectively, the five leading commodity groups accounted for 83.8% of Paso del Norte's total truck exports, compared with 60.6% in Laredo and 59.3% in San Diego. This comparison indicates that Paso del Norte's truck export structure is more concentrated among its leading commodities, while exports through Laredo and San Diego are relatively more diversified across commodity groups.

**PDN'S TECHNOLOGY-RELATED
COMMODITIES ACCOUNT FOR
73.2% OF TRUCK EXPORTS**

Figure 5. Total Imports & Growth by Selected Major Border Regions



Note: The Laredo region comprises the Laredo PoE in TX; the Paso del Norte region comprises the Bridge of the Americas (BOTA), Tornillo, and Ysleta PoEs in TX and Santa Teresa PoE in NM; and the San Diego region comprises the Otay Mesa, San Ysidro, and Tecate PoEs in CA.

Source: The Hunt Institute using data from the U.S. Bureau of Transportation Statistics.

Imports

Similarly, the inflation-adjusted total import values (2025 dollars) and YoY import growth for Laredo, Paso del Norte, and San Diego are summarized in Figure 5. The results indicate that although Laredo continues to process the highest total value of truck imports, the Paso del Norte region has experienced the strongest growth in import value over the study period.

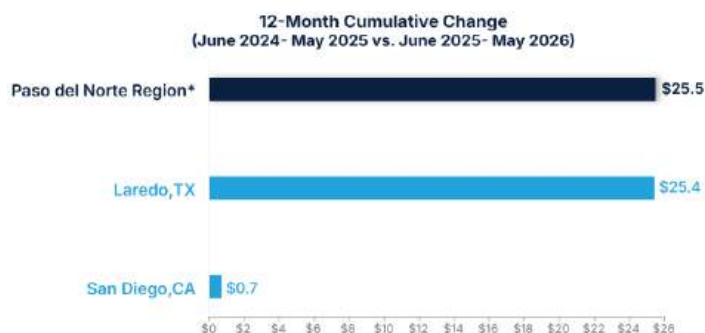
Inflation-adjusted total imports through PdN increased from \$5.9 billion in January 2020 to \$11.7 billion in May 2026, nearly doubling over the period. This growth outpaced both Laredo (79.8%) and San Diego (10.1%).

As shown in the YoY growth chart, the Paso del Norte region has consistently recorded the highest import growth rates since early 2024, outperforming both Laredo and San Diego. Although all three regions experienced slower import growth during 2022 and early 2023, the Paso del Norte region recovered more rapidly and has maintained stronger YoY growth since 2024.

PDN RECORDED THE HIGHEST YOY TOTAL IMPORT GROWTH SINCE 2024

Figure 6. Truck Imports by Selected Major Border Regions (USD Billion)

	June 2024 to May 2025	June 2025 to May 2026
Paso del Norte Region*	\$88.2	\$113.7
Laredo, TX	\$181.6	\$207.0
San Diego, CA	\$38.4	\$39.1



Note: Changes between two 12-month periods. Figures shown for the periods of June 2024-May 2025 and June 2025-May 2026 are cumulative; the comparison of changes between the two periods reflects the difference between these accumulated figures. The Laredo region comprises the Laredo PoE in TX; the Paso del Norte region comprises the Bridge of the Americas (BOTA), Tornillo, and Ysleta PoEs in TX and Santa Teresa PoE in NM; and the San Diego region comprises the Otay Mesa, San Ysidro, and Tecate PoEs in CA.

Source: The Hunt Institute using data from the U.S. Bureau of Transportation Statistics.

As for truck imports, Figure 6 shows that all three leading border regions experienced growth in truck imports during June 2024-May 2025 to June 2025-May 2026. The Paso del Norte region led in terms of both absolute and percentage growth: truck imports increased by \$25.5 billion (28.9%). Compared with the previous reporting period, the Paso del Norte region surpassed Laredo's and San Diego's increases at \$25.4 billion (14%) and \$0.7 billion (1.8%), respectively.

The growth of the Paso del Norte region coincides with manufacturing activity in Ciudad Juárez, increased demand for intermediate goods, and the integration of regional supply chains. The increase in import value is consistent with the region's expanding role in supporting advanced manufacturing industries, including electronics, automotive components, medical devices, and other high-value products.

Although the Paso del Norte region recorded the fastest growth, Laredo remained the nation's largest truck import gateway, processing \$207 billion in imports during the same reporting period. Its transportation infrastructure and strategic location continue to make Laredo the principal entry point for U.S.-Mexico freight trade.

San Diego ranked third, with truck imports totaling \$39.1 billion, an increase of \$0.7 billion (1.8%) over the previous year. Although import growth remained relatively stable, the San Diego region continues to play an important role in facilitating trade between Southern California and Baja California, particularly for the electronics, medical device, and consumer goods industries.



**PDN RECORDED THE STRONGEST
TRUCK IMPORT GROWTH, UP
\$25.5 B (28.9%)**

Figure 7. Top 5 Truck Commodities Imported through Selected Major Border Regions, 2025



Note: The Laredo region comprises the Laredo PoE in TX; the Paso del Norte region comprises the Bridge of the Americas (BOTA), Tornillo, and Ysleta PoEs in TX and Santa Teresa PoE in NM; and the San Diego region comprises the Otay Mesa, San Ysidro, and Tecate PoEs in CA.
Source: The Hunt Institute using data from the U.S. Bureau of Transportation Statistics.

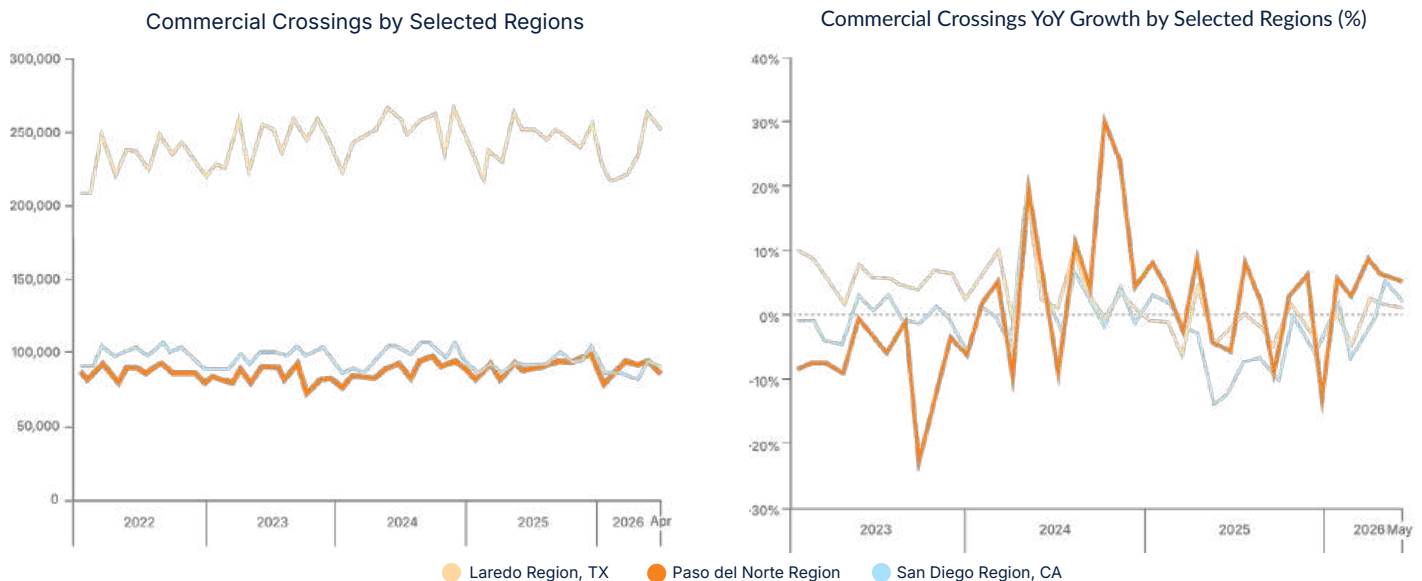
Figure 7 compares the top 5 truck import commodities across the Paso del Norte, Laredo, and San Diego regions in 2025. Similar to its truck export profile, the Paso del Norte region exhibits a more concentrated import structure than the other two major border regions, with trade heavily centered on computer-related and electrical machinery.

In 2025, computer-related machinery and parts were the top truck import commodity through Paso del Norte, reaching \$62.2 billion and accounting for 61.4% of the region's truck imports. Electrical machinery, equipment, and parts ranked second at \$16.6 billion, representing an additional 16.4%. Together, these two commodity groups accounted for approximately 77.8% of Paso del Norte's truck imports. Other major imports through Paso del Norte included measuring and testing instruments (\$7.1 billion), vehicles other than railway (\$5.2 billion), and furniture, lamps, and prefabricated buildings (\$2.2 billion). Collectively, the five leading commodities represented approximately 92.1% of the region's truck imports, indicating a highly specialized import structure. By comparison, the top 5 commodities accounted for approximately 75.7% of Laredo's truck imports and 74.6% of San Diego's truck imports.

**PDN TOP 5 COMMODITIES
REPRESENTED 92.1% OF TRUCK
IMPORTS**

b. Crossings by Selected Major Border Regions

Figure 8. Northbound Commercial Crossings & Growth by Selected Major Border Regions



Note: Commercial crossings include the number of trucks. The Laredo region comprises the Laredo PoE in TX; the Paso del Norte region comprises the Bridge of the Americas (BOTA), Tornillo, and Ysleta PoEs in TX and Santa Teresa PoE in NM; and the San Diego region comprises the Otay Mesa, San Ysidro, and Tecate PoEs in CA.

Source: The Hunt Institute using data from the U.S. Bureau of Transportation Statistics.

Northbound Commercial Crossings

Figure 8 compares monthly commercial truck crossings and YoY growth for Laredo, Paso del Norte, and San Diego, from January 2022 to April 2026. While Laredo continued to process the largest number of commercial truck crossings, the Paso del Norte region exhibited the strongest growth during the study period.

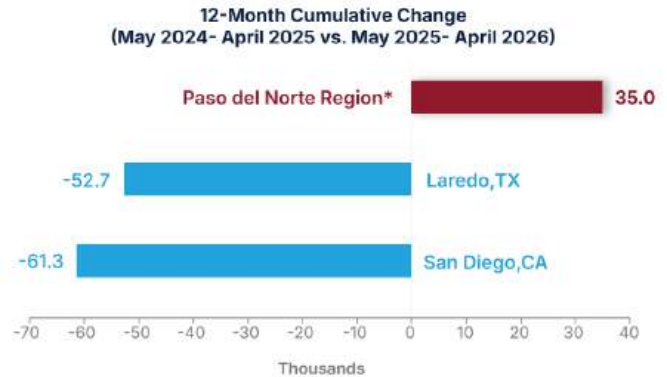
Commercial crossings through Paso del Norte generally ranged between 65,000 and 99,000 trucks per month, with volumes trending upward since late 2023. By early 2026, the region was processing close to 90,000 commercial truck crossings per month. In contrast, Laredo maintained relatively stable average monthly volumes of 245,000 crossings, while San Diego remained comparatively steady, averaging 84,000 crossings over the same period.

The YoY growth trends highlight Paso del Norte's strong performance. Since 2024, the region has consistently outpaced Laredo and San Diego in YoY growth, peaking at 65% in September 2024.

PDN OUTPACED LAREDO & SAN DIEGO IN YOY GROWTH IN NORTHBOUND COMMERCIAL CROSSINGS

Figure 9. Northbound Commercial Crossings by Selected Major Border Regions

	May 2024 to April 2025	May 2025 to April 2026
Paso del Norte Region*	1,003,635	1,038,534
Laredo, TX	1,100,796	1,048,086
San Diego, CA	2,997,898	2,936,579



Note: Commercial crossings include the number of trucks. Changes between two 12-month periods. Figures shown for the periods of May 2024-April 2025 and May 2025-April 2026 are cumulative; the comparison of changes between the two periods reflects the difference between these accumulated figures. The Laredo region comprises the Laredo PoE in TX; the Paso del Norte region comprises the Bridge of the Americas (BOTA), Tornillo, and Ysleta PoEs in TX and Santa Teresa PoE in NM; and the San Diego region comprises the Otay Mesa, San Ysidro, and Tecate PoEs in CA.

Source: The Hunt Institute using data from the U.S. Bureau of Transportation Statistics.

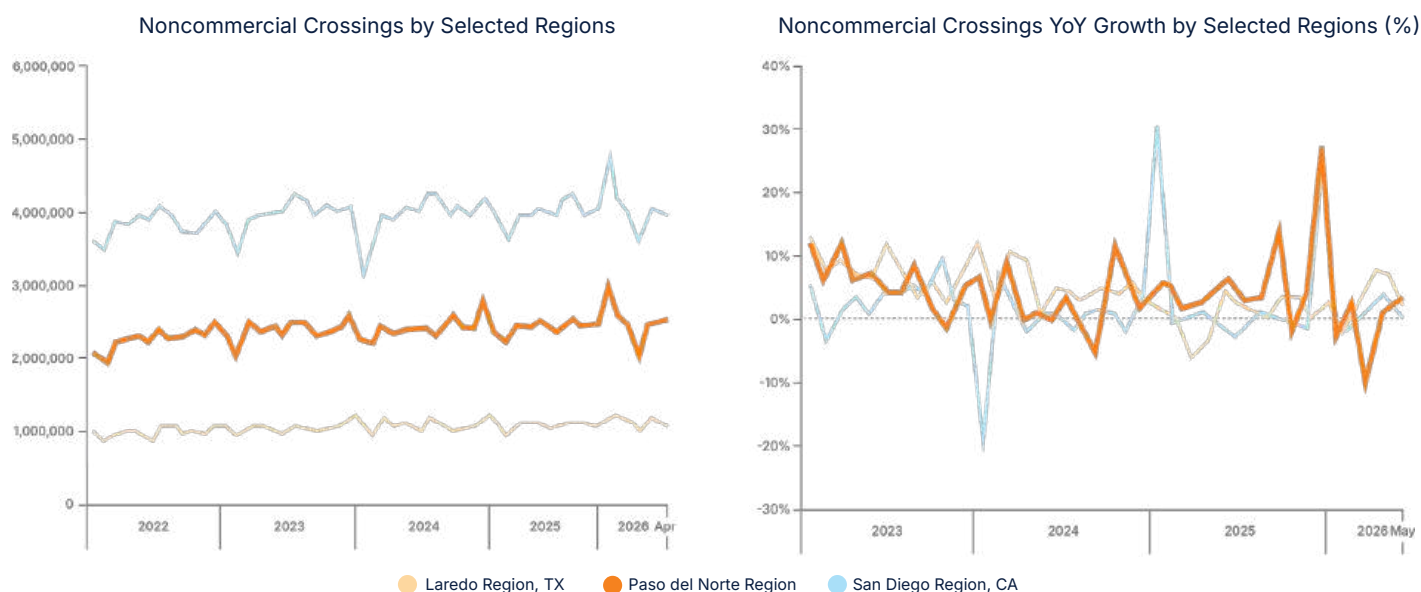
Figure 9 compares cumulative commercial truck crossings among the three major U.S.-Mexico border regions for the May 2024-April 2026 and the May 2025-April 2026 periods. During the same study period, the Paso del Norte region was the only major border region to experience growth in commercial truck traffic. Commercial crossings in the region increased by 34,899 trucks (3.5%), reaching 1 million crossings. The increase occurred alongside continued manufacturing activity and cross-border trade in the El Paso-Ciudad Juárez region.

In contrast, both Laredo and San Diego recorded declines in commercial truck crossings during the same period. Laredo remained the busiest commercial gateway along the U.S.-Mexico border, processing 2.9 million truck crossings despite a decrease of 61,319 crossings (-2%) from the previous reporting period. Similarly, San Diego experienced a decline of 52,710 crossings (-4.8%), with total commercial truck crossings decreasing from 1.1 million to 1 million.



**PDN WAS THE ONLY REGION
TO RECORD GROWTH IN
NORTHBOUND COMMERCIAL
CROSSINGS**

Figure 10. Northbound Noncommercial Crossings & Growth by Selected Major Border Regions



Note: Noncommercial crossings include the number of private vehicle passengers, bus passengers, and pedestrians. The Paso del Norte region comprises the Bridge of the Americas, the Santa Teresa, Tornillo, and Ysleta ports of entry. The Laredo region comprises the Laredo PoE in TX; the Paso del Norte region comprises the Bridge of the Americas (BOTA), Tornillo, and Ysleta PoEs in TX and Santa Teresa PoE in NM; and the San Diego region comprises the Otay Mesa, San Ysidro, and Tecate PoEs in CA.

Source: The Hunt Institute using data from the U.S. Bureau of Transportation Statistics.

Northbound Noncommercial Crossings

Figure 10 compares monthly northbound noncommercial border crossings, including private vehicle passengers, bus passengers, and pedestrians, and their YoY growth for the San Diego, Paso del Norte, and Laredo regions from January 2022 through April 2026. Among the three regions, San Diego recorded the highest volume of noncommercial crossings, followed by Paso del Norte and Laredo.

Monthly noncommercial crossings through the Paso del Norte region increased from approximately 2 million in January 2022 to about 2.5 million by April 2026. Although the data exhibits seasonal fluctuations, the overall trend is upward. This trend reflects sustained growth in cross-border travel for commuting, shopping, education, healthcare, tourism, and other personal purposes between El Paso and Ciudad Juárez.

In comparison, the San Diego region consistently processed between 3.5 and 4.5 million noncommercial crossings per month, maintaining the highest volume among the three regions. Laredo remained relatively stable, with monthly noncommercial crossings ranging from approximately 1 to 1.2 million throughout the study period.

The YoY growth trends show greater volatility, particularly in San Diego and Paso del Norte. Both regions experienced several periods of sharp increases and declines, while Laredo generally exhibited more moderate fluctuations.

**PDN NORTHBOUND
NONCOMMERCIAL CROSSINGS
TREND UPWARD DESPITE SEASONAL
FLUCTUATIONS**

Figure 11. Northbound Noncommercial Crossings by Selected Major Border Regions



Note: Noncommercial crossings include the number of private vehicle passengers, bus passengers, and pedestrians. Changes between two 12-month periods. Figures shown for the periods of May 2024-April 2025 and May 2025-April 2026 are cumulative; the comparison of changes between the two periods reflects the difference between these accumulated figures. The Laredo region comprises the Laredo PoE in TX; the Paso del Norte region comprises the Bridge of the Americas (BOTA), Tornillo, and Ysleta PoEs in TX and Santa Teresa PoE in NM; and the San Diego region comprises the Otay Mesa, San Ysidro, and Tecate PoEs in CA.

Source: The Hunt Institute using data from the U.S. Bureau of Transportation Statistics.

As shown in Figure 11, the three regions, Paso del Norte, Laredo, and San Diego, account for the majority of pedestrian, private vehicle passenger, and bus passenger crossings along the U.S.-Mexico border and play a vital role in facilitating daily commuting, tourism, education, healthcare access, shopping, and family travel.

During May 2024-April 2025 and May 2025-April 2026, the Paso del Norte region recorded the largest increase in noncommercial traffic, with crossings rising by 915,052 (3.1%), from 29.2 million to 30.1 million. Laredo also experienced growth, adding 296,009 crossings (2.2%) to reach nearly 13.9 million noncommercial crossings. In contrast, San Diego remained the busiest noncommercial gateway along the U.S.-Mexico border despite a slight decline of 28,545 crossings (0.1%), totaling 51 million crossings during the reporting period.

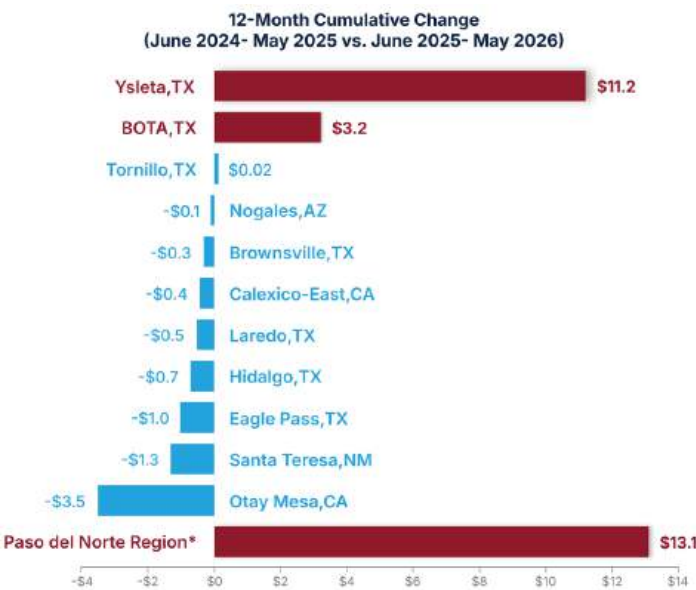


PDN RECORDED THE LARGEST INCREASE IN NORTHBOUND NONCOMMERCIAL TRAFFIC

ii. Cross-Border Trade and Crossings by PoE

Figure 12. U.S. Truck Exports to Mexico by PoE (USD Billion)

	June 2024 to May 2025	June 2025 to May 2026
Ysleta, TX	\$32.9	\$44.1
BOTA, TX	\$8.3	\$11.5
Tornillo, TX	\$0.02	\$0.04
Nogales, AZ	\$9.0	\$8.9
Brownsville, TX	\$7.5	\$7.2
Calexico-East, CA	\$8.4	\$8.0
Laredo, TX	\$106.7	\$106.2
Hidalgo, TX	\$12.6	\$11.9
Eagle Pass, TX	\$4.9	\$3.9
Santa Teresa, NM	\$15.6	\$14.3
Otay Mesa, CA	\$23.2	\$19.7
Paso del Norte Region*	\$56.8	\$69.9



Note: Changes between two 12-month periods. Figures shown for the periods of June 2024-May 2025 and June 2025-May 2026 are cumulative; the comparison of changes between the two periods reflects the difference between these accumulated figures. The Paso del Norte region is included in this figure for further context.

Source: The Hunt Institute using data from The Bureau of Transportation Statistics.

Cross-Border Trade

Figure 12 compares the cumulative U.S. truck exports to Mexico for the periods June 2024 - May 2025 and June 2025 - May 2026 at major PoEs along the U.S.-Mexico border, as well as at the Tornillo PoE and the Paso del Norte region, for further context.

Among the major PoEs, Ysleta recorded the largest increase in truck export value, rising by \$11.2 billion, from \$32.9 billion to \$44.1 billion. BOTA also experienced growth, with truck exports increasing by \$3.2 billion, from \$8.3 billion to \$11.5 billion. Although starting from a much smaller base, Tornillo nearly doubled its truck export value, increasing from approximately \$20 million to \$40 million.

In contrast, most other major border PoEs experienced declines in truck export values during the same period. Laredo truck exports declined by \$0.5 billion, from \$106.7 billion to \$106.2 billion. Otay Mesa recorded the largest decrease among the major ports, with truck exports falling \$3.5 billion, followed by Santa Teresa (\$1.3 billion) and Eagle Pass (\$1 billion).

YSLETA & BOTA LED U.S.-MEXICO BORDER TRUCK EXPORT GROWTH

Figure 13. U.S. Truck Imports from Mexico by PoE (USD Billion)

	June 2024 to May 2025	June 2025 to May 2026
Laredo, TX	\$181.6	\$207.0
Ysleta, TX	\$60.5	\$81.4
Tornillo, TX	\$1.8	\$5.3
Otay Mesa, CA	\$37.7	\$38.5
BOTA, TX	\$2.3	\$3.1
Del Rio, TX	\$3.3	\$3.8
Nogales, AZ	\$16.3	\$16.7
Santa Teresa, NM	\$23.6	\$23.9
Eagle Pass, TX	\$6.0	\$5.7
Hidalgo, TX	\$29.3	\$29.0
Brownsville, TX	\$8.0	\$7.2
Calexico-East, CA	\$12.7	\$11.4
Paso del Norte Region*	\$88.2	\$113.7



Note: Changes between two 12-month periods. Figures shown for the periods of June 2024-May 2025 and June 2025-May 2026 are cumulative; the comparison of changes between the two periods reflects the difference between these accumulated figures. The Paso del Norte region is included in this figure for further context.

Source: The Hunt Institute using data from The Bureau of Transportation Statistics.

Truck imports exhibited a different pattern over the same study period. As shown in Figure 13, the majority of the major PoEs recorded increases in the cumulative truck import values between June 2024 and May 2025 and between June 2025 and May 2026.

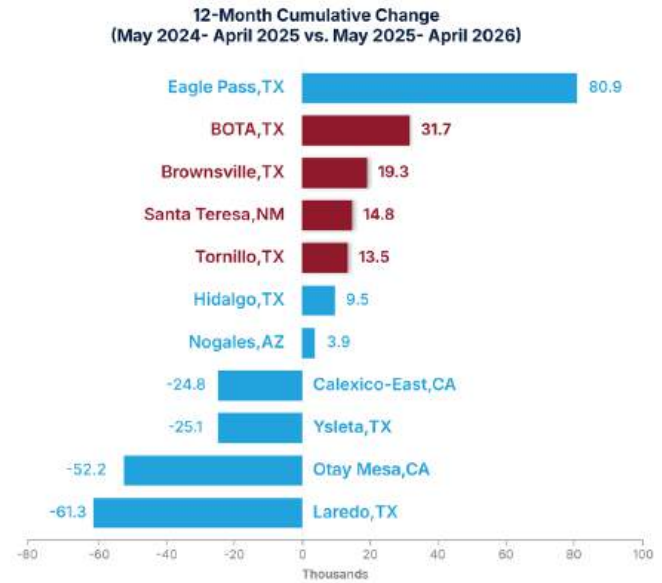
Among the major PoEs, Laredo recorded the largest increase in truck import value, rising by \$25.4 billion, from \$181.6 billion to \$207 billion during June 2025-May 2026. Ysleta posted the second largest increase, with truck imports growing by \$20.9 billion, followed by Tornillo, which increased by \$3.5 billion. Otay Mesa and BOTA each recorded gains of \$0.8 billion over the same period.

In contrast, Calexico East, Brownsville, Hidalgo, and Eagle Pass experienced declines in truck import values during the same study period.

TRUCK IMPORTS INCREASED AT MOST MAJOR POES

Figure 14. Northbound Commercial Crossings by PoE

	May 2024- April 2025	May 2025- April 2026
Eagle Pass, TX	288,488	369,390
BOTA, TX	141,504	173,180
Brownsville, TX	297,121	316,372
Santa Teresa, NM	167,680	182,491
Tornillo, TX	25,389	38,868
Hidalgo, TX	716,871	726,365
Nogales, AZ	407,224	411,115
Calexico-East, CA	463,098	438,312
Ysleta, TX	669,062	643,995
Otay Mesa, CA	1,041,017	988,783
Laredo, TX	2,997,898	2,936,579



Note: Commercial crossings refer to the number of trucks. Changes between two 12-month periods. Figures shown for the periods of May 2024-April 2025 and May 2025-April 2026 are cumulative; the comparison of changes between the two periods reflects the difference between these accumulated figures.
Source: The Hunt Institute using data from The Bureau of Transportation Statistics.

Northbound Commercial Border Crossings

Figure 14 compares northbound commercial truck crossings at the major U.S.-Mexico PoEs between May 2024-April 2025 and May 2025-April 2026, highlighting changes in commercial truck crossing activity across the border.

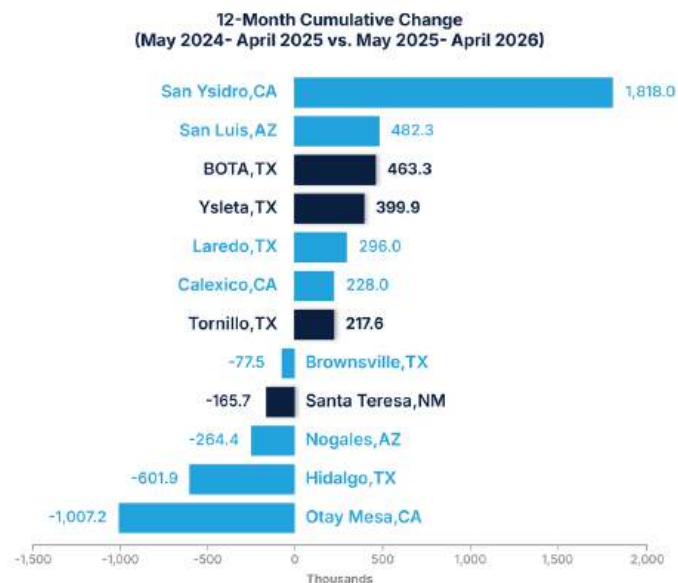
Among the major PoEs, Eagle Pass recorded the largest increase, with crossings rising by 80,902 trucks (from 288,488 to 369,390). Within the Paso del Norte region, commercial crossings increased at BOTA, Santa Teresa, and Tornillo PoEs. BOTA experienced the second largest increase among the major border ports, adding 31,676 commercial truck crossings, followed by Santa Teresa, which gained 14,811 crossings, and Tornillo, which increased by 13,479 crossings. In contrast, Ysleta recorded a decline of 25,067 truck crossings, decreasing from 669,062 to 643,995.

Outside the Paso del Norte region, Brownsville, Hidalgo, and Nogales recorded increases, while Laredo, Otay Mesa, and Calexico East experienced declines in commercial truck crossings. Despite the reduction of 61,319 crossings at Laredo, it remained the busiest commercial truck crossing along the U.S.-Mexico border, handling nearly 2.94 million northbound truck crossings during the same reporting period.

BOTA, SANTA TERESA, AND TORNILLO RECORDED NORTHBOUND COMMERCIAL CROSSING GROWTH, WHILE YSLETA RECORDED A DECLINE

Figure 15. Northbound Noncommercial Crossings by PoE

	May 2024- April 2025	May 2025- April 2026
San Ysidro,CA	31,774,165	33,592,189
San Luis,AZ	8,249,235	8,731,545
BOTA,TX	18,088,164	18,551,466
Ysleta, TX	7,882,090	8,282,000
Laredo,TX	13,583,782	13,879,791
Calexico,CA	12,060,837	12,288,739
Tornillo,TX	1,609,375	1,826,937
Brownsville,TX	11,883,826	11,806,347
Santa Teresa,NM	1,624,726	1,459,004
Nogales,AZ	10,739,687	10,475,274
Hidalgo,TX	11,959,331	11,357,423
Otay Mesa,CA	14,051,542	13,044,373



Note: Noncommercial crossings refer to Personal Vehicle Passengers, Pedestrians, and Bus Passengers. Changes between two 12-month periods. Figures shown for the periods of May 2024-April 2025 and May 2025-April 2026 are cumulative; the comparison of changes between the two periods reflects the difference between these accumulated figures.

Source: The Hunt Institute using data from The Bureau of Transportation Statistics.

Northbound Noncommercial Border Crossings

Figure 15 compares northbound noncommercial crossings at the major U.S.-Mexico PoEs between May 2024 and April 2025 and between May 2025 and April 2026, highlighting changes in pedestrian, private vehicle passenger, and bus passenger crossings.

Overall, noncommercial crossings exhibited mixed trends across the major border PoEs. San Ysidro remained the busiest noncommercial PoE, processing 33.6 million crossings during the May 2025-April 2026 period, an increase of 1.8 million crossings compared with the previous 12-month period. San Luis recorded the second-largest increase, with 482,310 additional crossings.

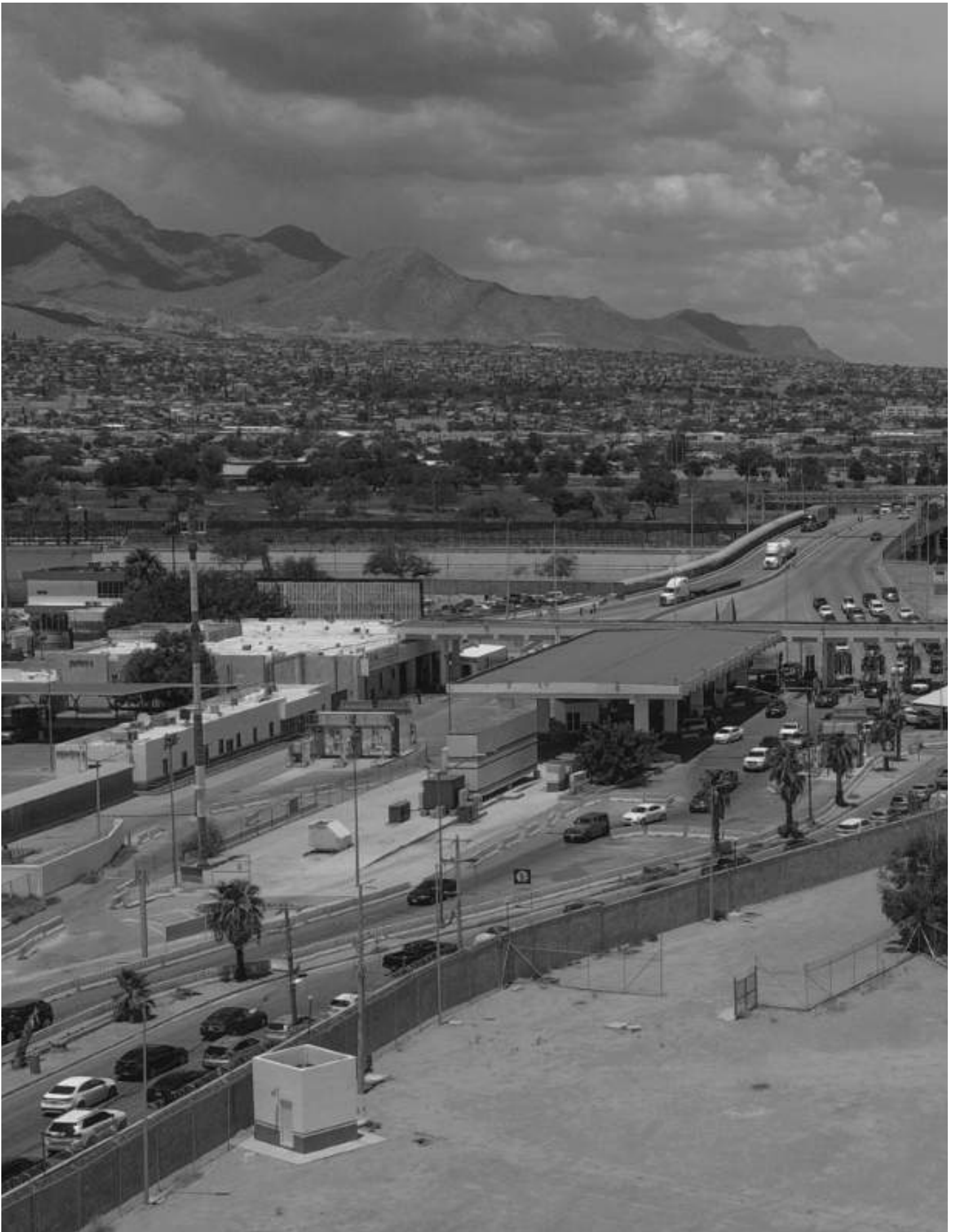
Within the Paso del Norte region, noncommercial crossings increased at BOTA, Ysleta, and Tornillo PoEs. BOTA recorded the third-largest increase among the major border land ports, with 463,302 additional crossings, followed by Ysleta, which gained 399,910 crossings, and Tornillo, which increased by 217,562 crossings. In contrast, Santa Teresa experienced a decline of 165,722 crossings during the same period.

BOTA, YSLETA, AND TORNILLO RECORDED NORTHBOUND NONCOMMERCIAL CROSSING GROWTH, WHILE SANTA TERESA DECLINED

V. BOTA LAND PORT OF ENTRY

The proposed modernization of BOTA includes between \$400-\$460 million in construction expenditures between 2028 and 2031 and is intended to expand passenger and pedestrian processing facilities while modernizing the existing port. Following the completion of the National Environmental Policy Act (NEPA) review initiated in 2023, the U.S. General Services Administration (GSA) selected Alternative 4, which provides for a multilevel modernization within the existing port boundaries, includes limited land acquisition, and eliminates all commercial cargo operations at the facility.

According to GSA, construction is scheduled to begin in early 2028, when commercial truck processing at the port would also cease, with project completion anticipated in the summer of 2031. Under this alternative, commercial traffic currently using BOTA would be redirected to other PoEs.



Bridge of the Americas PoE located in El Paso, Texas

i. History of BOTA

BOTA is one of the international land ports connecting El Paso and Ciudad Juárez. Located along the U.S.–Mexico border, the facility links directly to the Córdova PoE, its counterpart in Ciudad Juárez, and serves commercial, passenger, and pedestrian traffic. It is the only toll-free international crossing in the Paso del Norte region.

The crossing's origins predate the current bridge structure. A wooden vehicular bridge was constructed in 1942 to connect the two communities across the Rio Grande; it was replaced in 1949 by the Córdova Island Bridge. The modern history of the crossing is closely tied to the resolution of the Chamizal dispute, a century-long territorial dispute between the United States and Mexico stemming from shifts in the flow of the Rio Grande. The signing of the Chamizal Treaty in 1963 and its implementation in 1967 redefined portions of the international boundary, facilitating the development of new infrastructure in the area.

BOTA was constructed as part of the broader Chamizal settlement and was formally inaugurated in 1969. The crossing occupies land associated with the former Córdova Island, which became part of the territorial exchange established under the treaty. The bridge was officially named in recognition of this historic diplomatic achievement and has since become a symbol of binational cooperation. Historical accounts note that U.S. President Lyndon B. Johnson and Mexican President Gustavo Díaz Ordaz participated in ceremonies commemorating the treaty's implementation and the redirection of the Rio Grande through a newly constructed channel, reinforcing the site's symbolic importance.

The PoE underwent significant modernization during the 1990s. By the early part of the decade, inspections revealed structural deterioration in the existing bridge complex, prompting both governments to pursue a comprehensive reconstruction effort. Construction of four new bridge structures began in 1996 and concluded in 1998. The redesigned facility included dedicated bridges for commercial and passenger vehicle traffic, improving operational efficiency and accommodating growing cross-border demand.

According to Manuel Sotelo, a member of the National Chamber of Freight Transportation (Canacar), the reconstruction of BOTA in the 90s was a pivotal moment in the history of cross-border infrastructure in Ciudad Juárez. At the time, the Mexican government lacked the approximately \$1.7 million required to finance its 20% share of the replacement bridge, while the United States had already secured funding. Federal authorities proposed operating the bridge as a toll facility to secure additional

funding.

The proposal emerged shortly after the opening of the Zaragoza land port in 1990, which had been developed under a federal concession. Sotelo explains that many local business leaders opposed another federal concession, having seen toll revenues from the recently opened Zaragoza PoE flow primarily to Mexico City rather than benefiting Ciudad Juárez.

Through the Committee for the Improvement of the Customs Yards at the Ciudad Juárez Border Customs, users established a joint trust fund, overseen by the Government of Chihuahua and representatives of bridge users. Voluntary toll contributions from commercial vehicles crossing northbound eventually financed Mexico's share of the reconstruction, along with an expansion of the original design in the U.S. cargo area.²⁵ The voluntary contribution system raised approximately \$7.1 million to finance the project and established a long-term maintenance fund.

Rather than simply replacing the existing eight-lane bridge, local stakeholders worked with state and U.S. authorities to relocate the structure to accommodate what is now Juan Pablo II Boulevard and ultimately expand the project to 12 lanes and four bridge structures: two dedicated to commercial traffic and two to passenger vehicles. Sotelo noted that both countries coordinated their construction efforts to ensure a continual flow of traffic. According to his account, the project reflected a long-standing regional commitment to investing in border infrastructure to support cross-border trade and anticipate future growth, even as subsequent increases in customs and security requirements quickly consumed much of the additional capacity.



Bridge of the Americas PoE located in El Paso, Texas

²⁵ Julian Resendiz, "Bridge No Longer Free for Truckers," *El Paso Herald-Post* (El Paso, TX), January 19, 1994, 2, ProQuest, <https://www.proquest.com/hnpelpasoherald/docview/2733258790>

ii. Current Conditions at BOTA

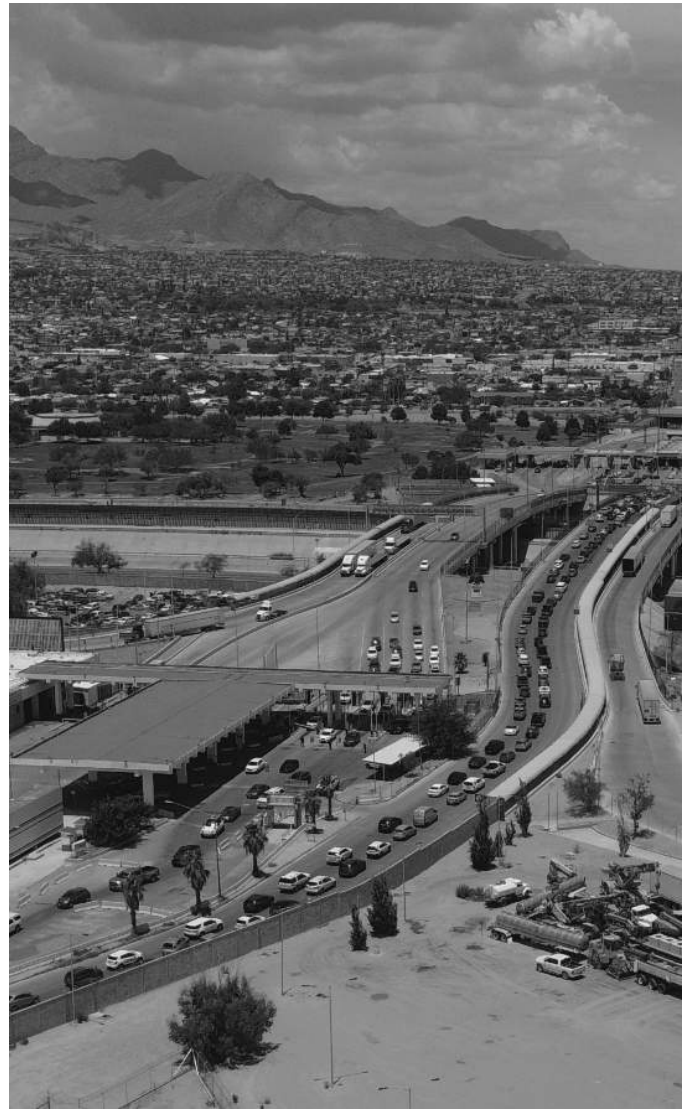
Today, BOTA occupies approximately 28 acres and consists of separate processing areas for passenger vehicles and commercial cargo, operated by the U.S. Department of Homeland Security's (DHS) Customs and Border Protection (CBP).

The passenger vehicle area includes multiple inspection lanes and pedestrian processing facilities, while the commercial section includes cargo inspection infrastructure and dedicated truck processing lanes.

The port also maintains an associated rail inspection facility operating in conjunction with CBP. The crossing incorporates programs designed to expedite processing, including Ready Lanes for travelers using radio-frequency identification (RFID)-enabled documents.

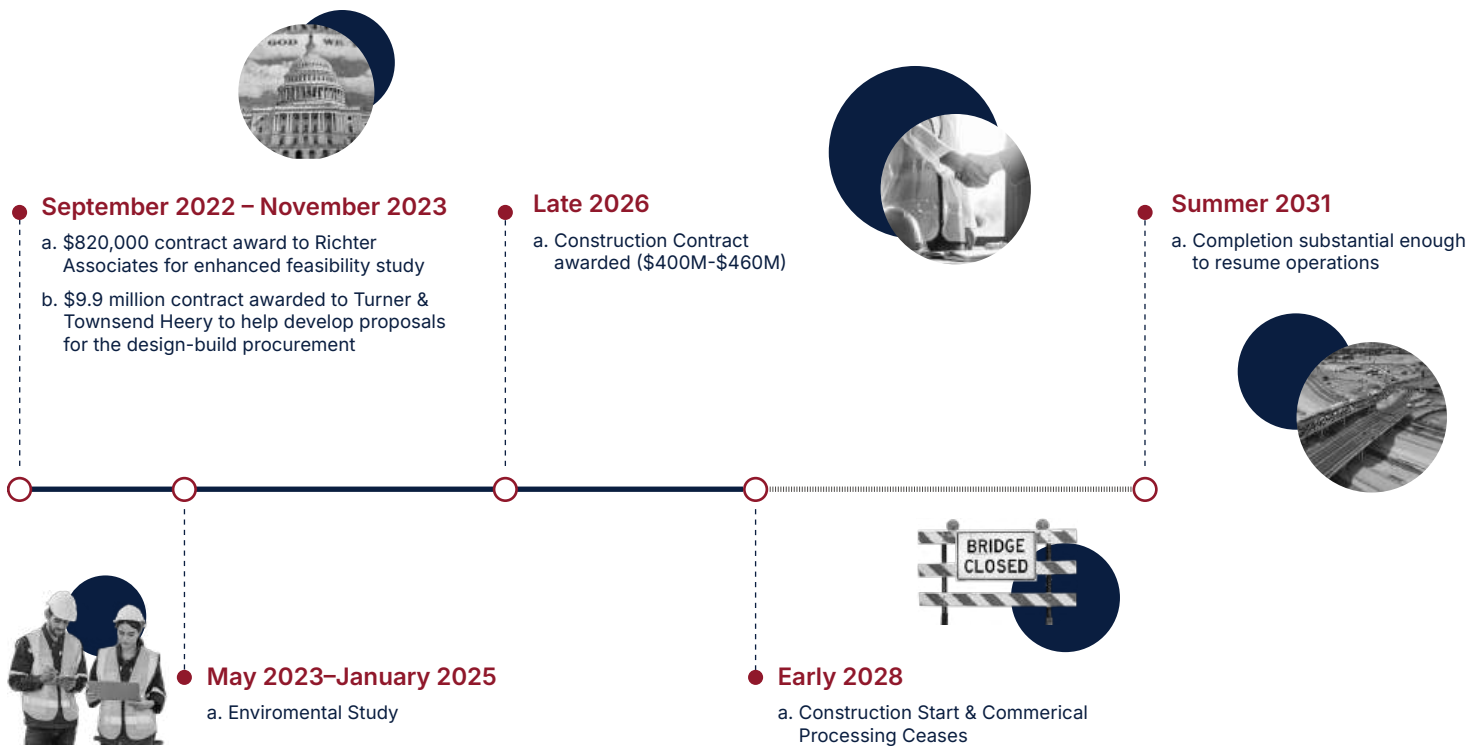
Currently, there are seven agencies housed at the port: CBP, Food and Drug Administration (FDA), Federal Motor Carrier Safety Administration (FMCSA), Immigration and Customs Enforcement (ICE), U.S. Department of Agriculture (USDA), U.S. Fish and Wildlife Service (USFWS), and the Texas Alcohol and Beverage Commission (TABC). According to CBP, the port is staffed by approximately 325 CBP personnel on a daily basis, contributing to a total federal workforce of roughly 350 employees.²⁶ In addition, approximately 95 contract workers, including custodial and maintenance staff, support port operations, bringing the total daily workforce to approximately 445 employees. CBP has recommended applying a 15% growth factor to account for the difference between current staffing levels and projected workload-based staffing requirements. Based on this adjustment, the total daily workforce is projected to increase to between 445 and 470 employees.

The GSA report says that despite previous modernization efforts, BOTA has experienced pressure from rising trade and travel volumes because much of its infrastructure has reached or exceeded its intended operational capacity, creating congestion and limiting the port's ability to meet contemporary inspection and security requirements. These challenges have prompted additional federal investment in recent years. GSA has undertaken a large-scale modernization program to upgrade infrastructure, improve operational efficiency, and address environmental concerns. As part of this initiative, commercial cargo operations at BOTA will cease in 2028.



Bridge of the Americas PoE located in El Paso, Texas

²⁶ U.S. General Services Administration, *Bridge of the Americas Land Port of Entry Final Environmental Impact Statement*, June 20126, <https://www.gsa.gov/system/files/BOTA%20Final%20EIS.pdf>.



BOTA modernization was funded through the Infrastructure Investment and Jobs Act, a five-year, \$1.2 trillion federal infrastructure statute signed into law by President Joe Biden in November of 2021. A total of \$600 million was originally allocated to BOTA through the funding package. Presently, the GSA's total revised budget for the project ranges from \$474 million to \$579.3 million, with design and construction costs estimated at \$400 million to \$460 million. In projects of this nature, GSA and CBP enter a landlord-tenant partnership, with GSA serving as the landlord/developer and CBP as the tenant.

This allocation was first used in 2022–23 to fund an \$820,000 enhanced feasibility study by Richter Associates, followed by a \$9.9 million contract to Turner & Townsend Heery to develop design-build proposals. A National Environmental Policy Act (NEPA) study was then carried out to assess the project's environmental impact. On May 2, 2025, GSA issued the Record of Decision (ROD) for the final Environmental Impact Statement (EIS), which had been released in January 2025. The ROD formally selected Alternative 4 as the preferred alternative for the BOTA modernization project. According to GSA, the selected alternative is expected to reduce noise impacts and improve local air quality compared with existing conditions. The issuance of the ROD concluded the project's NEPA review, a process that began in 2023.

Reduced Hours of Operation

Since 2020, BOTA's commercial hours of operation have been progressively reduced. Prior to the COVID-19 pandemic, commercial traffic was processed from 6:00 a.m. to 6:00 p.m., Monday through Friday, and from 6:00 a.m. to 2:00 p.m. on Saturdays. During the pandemic, CBP reduced operating hours, citing staffing shortages. Between 2020 and 2022, weekday operations were shortened to 6:00 a.m. to 4:00 p.m., while Saturday service was discontinued. Operating hours were further reduced in 2023, resulting in an eight-hour window from 6:00 a.m. to 2:00 p.m., Monday through Friday.

Transportation companies in the region argue that these shorter operating hours have altered carrier activity. In practice, trucking companies say they avoid using BOTA after approximately 12:30 p.m. because a shipment selected for secondary inspection can require an additional 60 to 90 minutes to clear. Given the limited remaining operating time, there is a risk that trucks will not be processed before the port closes, which would delay delivery schedules and reduce BOTA's overall reliability. As a result, many carriers choose to route cargo through other PoEs later in the day, even when BOTA would otherwise be an option due to its proximity. Over time, these operational constraints have reduced the bridge's appeal to commercial traffic and shifted freight movements to other PoEs in the region.

**BOTA COMMERCIAL OPERATING
HOURS HAVE REDUCED SINCE
2020**

**BOTA REDUCED OPERATING
HOURS HAVE SHIFTED
COMMERCIAL TRAFFIC TO OTHER
PDN POEs**



Commercial Capacity Across the Border

Research has shown that U.S.-Mexico commercial ports have historically expanded their capacity by adding lanes, technology, inspection facilities, and long-term infrastructure investments to meet rising demand. Whereas some PoEs have increased their commercial processing capacity, the planned modernization of BOTA includes the removal of six commercial lanes and an increase in passenger-vehicle processing capacity.

Since 2023, Laredo has continued to expand commercial crossing capacity through infrastructure investments and operational improvements designed to reduce congestion and improve freight throughput, including the opening of four dedicated FAST lanes at the World Trade Bridge. The project relocated FAST-certified traffic to a dedicated inspection area with four approach lanes, four primary inspection booths, and dedicated exit lanes, allowing trusted carriers to bypass general commercial traffic. According to GSA, the project was designed to reduce wait times for both FAST and non-FAST traffic by separating pre-approved, low-risk carriers from general commercial flows.²⁷

Laredo is also advancing a larger expansion of the World Trade Bridge. In 2026, federal, state, and local officials announced the completion of the draft environmental assessment and the award of a federal BUILD grant. The proposed project would widen the existing bridge by adding two southbound commercial lanes and constructing a new eight-lane bridge dedicated to northbound commercial traffic. Once completed, the World Trade Bridge would increase from eight to 18 commercial lanes.²⁸

Unlike projects focused primarily on modernizing existing facilities, Otay Mesa East PoE (OME) is being built as an entirely new commercial gateway intended to accommodate the continued growth of cross-border trade between Southern California and Baja California. The new crossing incorporates several design features intended to increase efficiency beyond those added by the inspection lanes. The project includes a dedicated commercial vehicle inspection facility, flexible inspection lanes that can be reconfigured based on traffic demand, intelligent transportation systems, a dynamic tolling system to manage congestion, and direct connections to California State Route 11. Project planners estimate that the facility will initially include five northbound commercial inspection lanes and can expand to 20 commercial lanes as freight demand grows. Passenger vehicle capacity is also designated for future expansion.²⁹



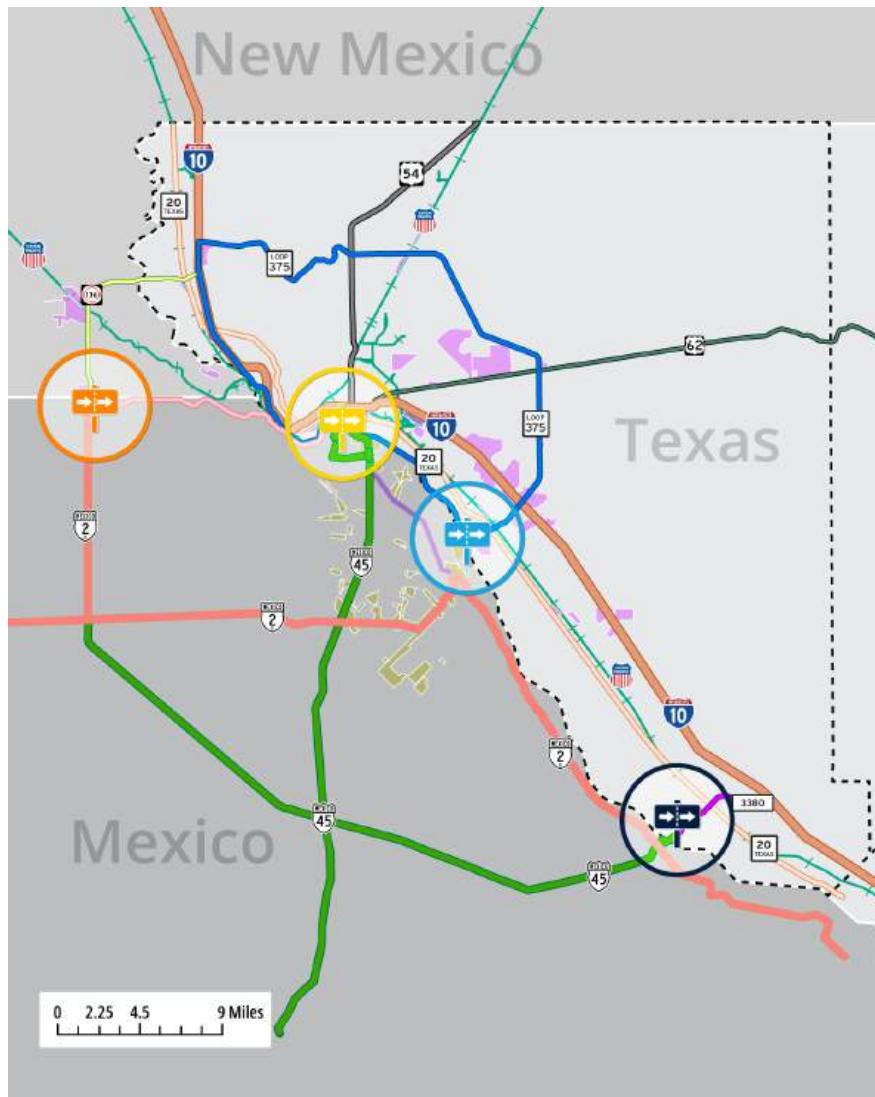
**BOTA MODERNIZATION
MAY REDUCE OVERALL
COMMERCIAL MAX CAPACITY
IN THE PDN REGION**

27 General Services Administration (GSA). "GSA Opens Four New FAST Lanes at Laredo's World Trade Land Port of Entry." February 24, 2023. <https://www.gsa.gov/about-gsa/newsroom/former-gsa-regional-news-archive/region-7-newsroom/greater-southwest-feature-stories-and-news-release/gsa-opens-four-new-fast-lanes-at-laredos-world-trade-land-port-of-entry-02242023>

28 Laredo Morning Times. "World Trade Bridge expansion advances after IBWC review." June 2026. <https://www.lmtonline.com/local/article/laredo-south-texas-border-commercial-trade-project-22312351.php>

29 California Transportation Commission – Project Description (June 2025): <https://catc.ca.gov/-/media/ctc-media/documents/ctc-meetings/2025/2025-06/103-4-13-a11y.pdf>

Map 3. Major Highways, Roads, & Industrial Parks in the Paso del Norte Region



U.S. Side

- | | | |
|------------------------|----------------------------------|----------------------------|
| Interstate 10 | Texas State Loop 375 | Santa Teresa Port of Entry |
| Interstate 110 | New Mexico State Road 136 | BOTA Port of Entry |
| U.S. Highway 62 | El Paso Farm to Market Road 3380 | Ysleta Port of Entry |
| U.S. Highway 54 | Railroad | Tornillo Port of Entry |
| Texas State Highway 20 | Industrial Parks in El Paso | El Paso County Boundary |

Mexico Side

- | | |
|----------------------------|-----------------------------------|
| Mexican Federal Highway 45 | Blvd. Manuel Gómez Morín |
| Mexican Federal Highway 2 | Industrial Parks in Ciudad Juárez |

iii. Regional Connectivity and Profiles

The Paso del Norte transportation network includes interstate highways, state highways, international bridges, rail corridors, and industrial parks that facilitate the movement of goods and people across the U.S-Mexico border. As shown in Map 3, the transportation network connects BOTA, Ysleta, Tornillo, and Santa Teresa PoEs with major interstate highways, Mexican federal highways, rail lines, and nearby industrial parks. The three-mile radius surrounding each port highlights the concentration of logistics and manufacturing facilities that support cross-border trade.

On the U.S. side, Interstate 10 (I-10) serves as the region's primary east-west freight corridor and forms part of the national interstate highway system connecting Southern California, Arizona, New Mexico, Texas, and the southeastern United States. Complementing I-10 are U.S. Highway 54, U.S. Highway 62/180, Loop 375 (Border Highway and Transmountain Expressway), and State Highway 20, which provide direct access to international bridges, industrial parks, distribution centers, and rail facilities. Loop 375 functions as an important bypass around central El Paso, reducing congestion and improving freight mobility between ports of entry and interstate corridors. The region also benefits from significant rail connectivity. Both Union Pacific Railroad and BNSF Railway operate major freight corridors through El Paso.

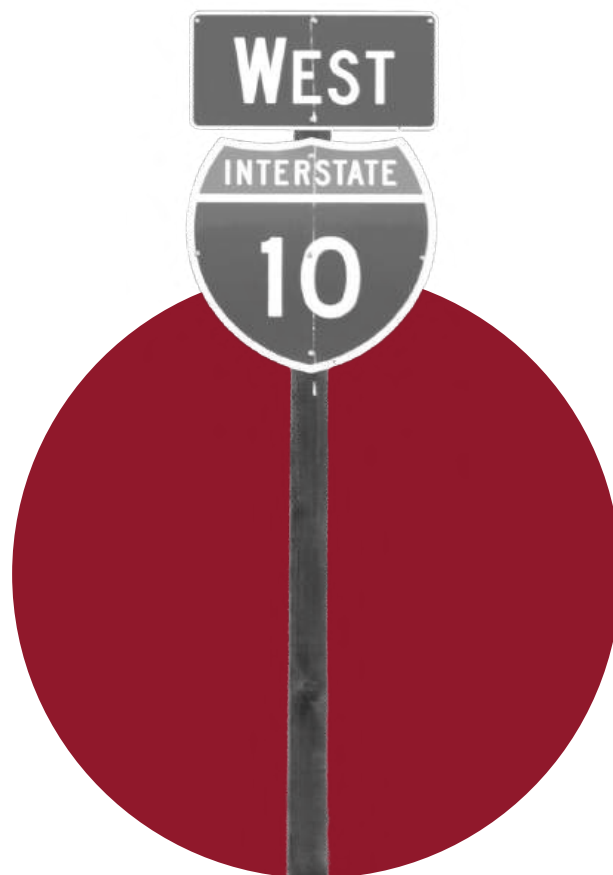
Mexico's freight connection to the Paso del Norte region depends on a small number of strategic corridors. The primary connection is Federal Highway 45, which links central and northern Mexico with Chihuahua and Ciudad Juárez. Federal Highway 2 functions as the principal east-west corridor along the northern border, connecting Baja California, Sonora, and northwestern Chihuahua with Ciudad Juárez and the Valley of Juárez. From these two major highways, cargo branches to different PoEs depending on the destination, the customs broker's location, bridge capacity, operating hours, and the type of shipment.

For cargo using El Paso's urban crossings, trucks typically move through Ciudad Juárez via corridors such as Avenida Juan Pablo II, Eje Vial Juan Gabriel, Avenida Manuel Gómez Morín, Avenida de las Torres, and Boulevard Zaragoza. These routes connect industrial parks and logistics facilities with BOTA and Ysleta, making them critical for daily manufacturing and distribution flows.

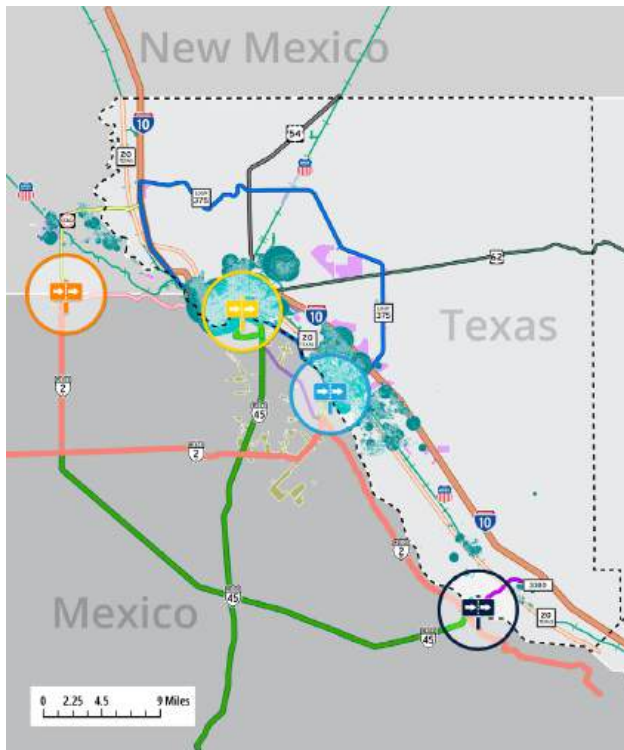
For cargo moving outside the urban core, two corridors have become especially important. To the east, the Guadalupe-Tornillo route connects freight with the Tornillo PoE and offers an alternative to congested crossings in Ciudad Juárez. To the west, the Jerónimo-Santa Teresa corridor connects Juárez with Santa Teresa, supporting cargo headed to New Mexico, western U.S. markets, and industrial operations near the border.

I-10 SERVES AS THE REGION'S PRIMARY EAST-WEST FREIGHT CORRIDOR

FEDERAL HIGHWAYS 45 & 2 CONNECT CIUDAD JUÁREZ TO MEXICO'S MAJOR FREIGHT NETWORKS



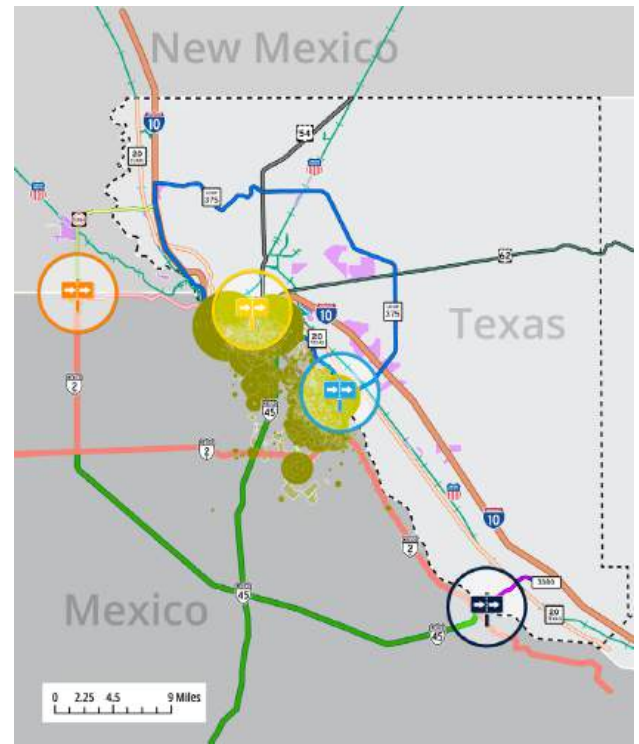
Map 4. Paso del Norte Region Businesses by Employment Along the PoEs



-  Santa Teresa Port of Entry, NM
-  BOTA Port of Entry, TX
-  Ysleta Port of Entry, TX
-  Tornillo Port of Entry, TX

Source: The Hunt Institute using data from Dun & Bradstreet.

Map 5. Ciudad Juárez Businesses by Employment Along the PoEs



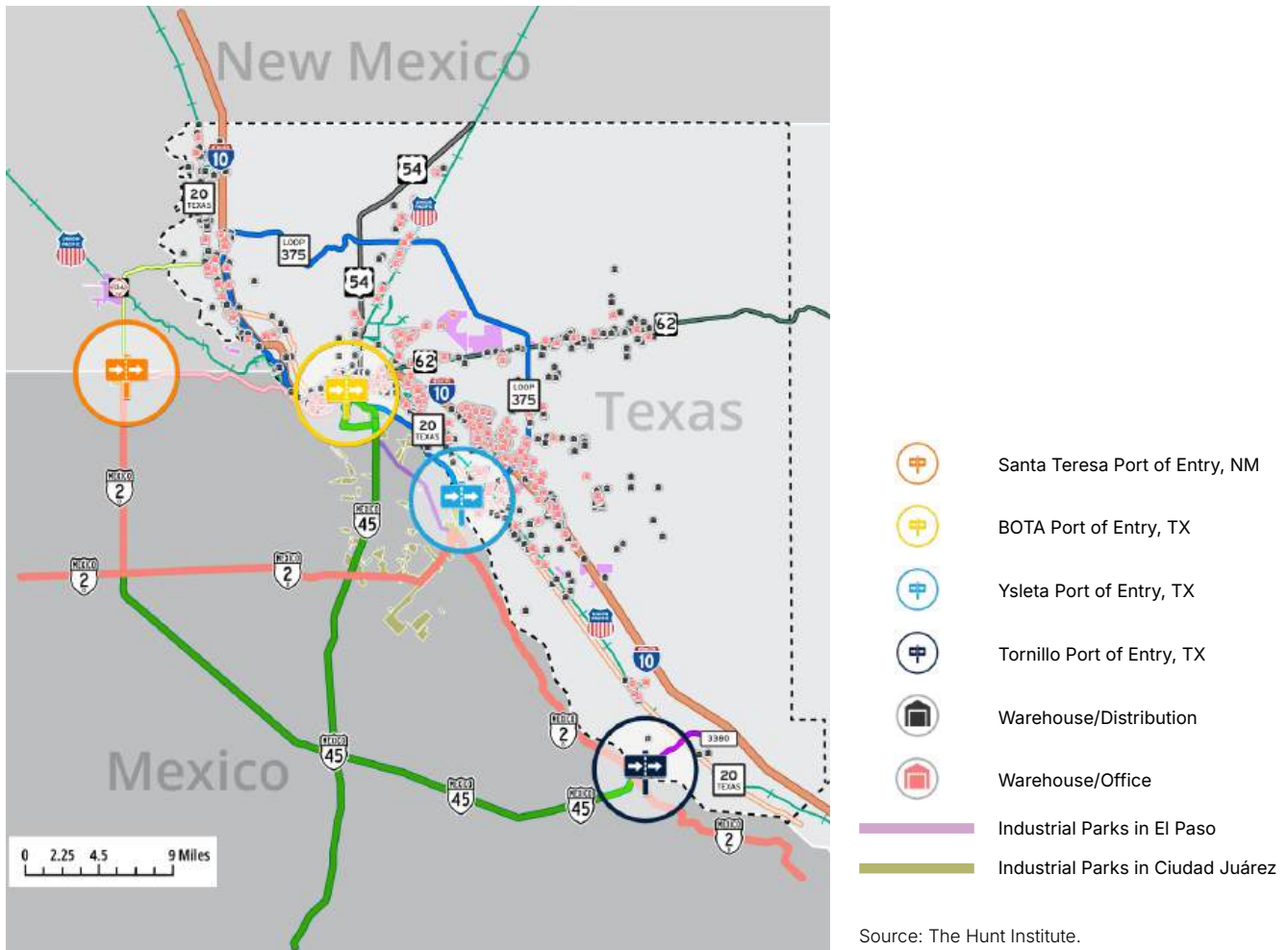
-  Employment: 0- 2,758
-  Employment: 0- 5,600
-  Industrial Parks in El Paso
-  Industrial Parks in Ciudad Juárez

Maps 4 and 5 illustrate the distribution of employment associated with businesses located within a three-mile radius of the four commercial PoEs in the Paso del Norte region in both El Paso and Ciudad Juárez. Symbol sizes are proportional to employment, highlighting the concentration of jobs supported by businesses surrounding each port.

Both maps show that the largest employment concentrations are located near BOTA and Ysleta PoEs, reflecting the region's established industrial base, major commercial corridors, and direct access to I-10. These areas support a diverse mix of manufacturing, transportation and warehousing, healthcare, retail, government, and business services.

In comparison, Santa Teresa and Tornillo exhibit lower employment concentrations, consistent with their smaller business bases and less-developed surrounding areas. Although these ports currently support fewer jobs, their proximity to available industrial land and regional freight corridors may support future logistics and manufacturing growth.

Map 6. Warehouses & Distribution Centers in the Paso del Norte Region



Map 6 illustrates the distribution of warehouses and distribution centers located throughout the Paso del Norte region, excluding Santa Teresa due to data limitations within a three-mile radius of the four commercial PoEs. The black symbol represents warehouses and offices, and the red symbol represents warehouses and distribution centers. These facilities contribute to the regional freight network by supporting the storage and distribution of goods moving between the United States and Mexico.

The map shows that warehouses and distribution centers are concentrated primarily around BOTA and Ysleta PoEs, where direct access to I-10, Loop 375, Texas 20, and the Union Pacific railroad provides efficient connections to regional manufacturing centers and national freight corridors. In contrast, the Tornillo PoE exhibits fewer surrounding warehouses and distribution centers, consistent with the lower levels of surrounding commercial development.



VI. PASO DEL NORTE LAND PORT OF ENTRY PROFILES



Bridge of the Americas PoE located in El Paso, Texas



i. Bridge of the Americas (BOTA), Texas

PRIVATE VEHICLE LANES
14

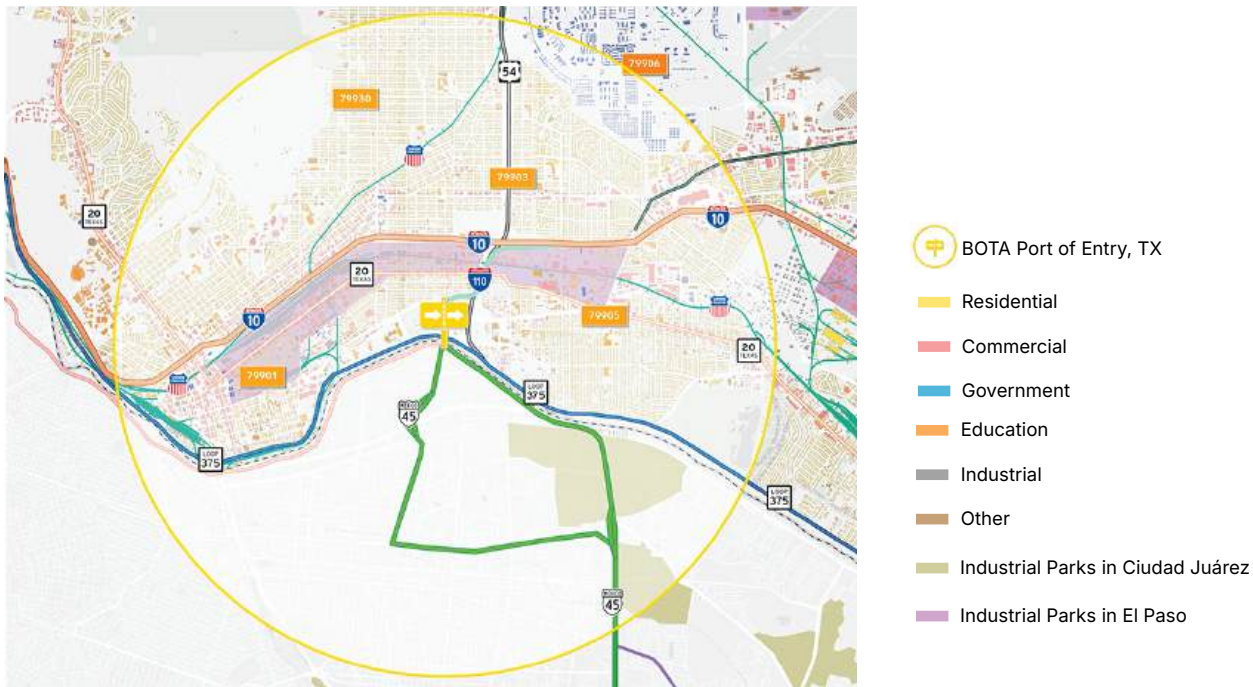
COMMERCIAL LANES
6

Hours of Operation
(Commercial Lanes)

- Monday to Friday 6:00 am- 2:00 pm
- Closed on Saturday and Sunday

a. Socioeconomic Profile

Map 7. Land Use & Connectivity within BOTA PoE 3-Mile Radius



Land Use Composition, Transportation & Major Industrial Parks

Map 7 illustrates the land use composition, transportation, and major industrial areas within a three-mile radius of BOTA. On the U.S. side, the study area is dominated by residential neighborhoods, particularly north of I-10, while commercial and industrial properties are concentrated along key transportation corridors and near the border.

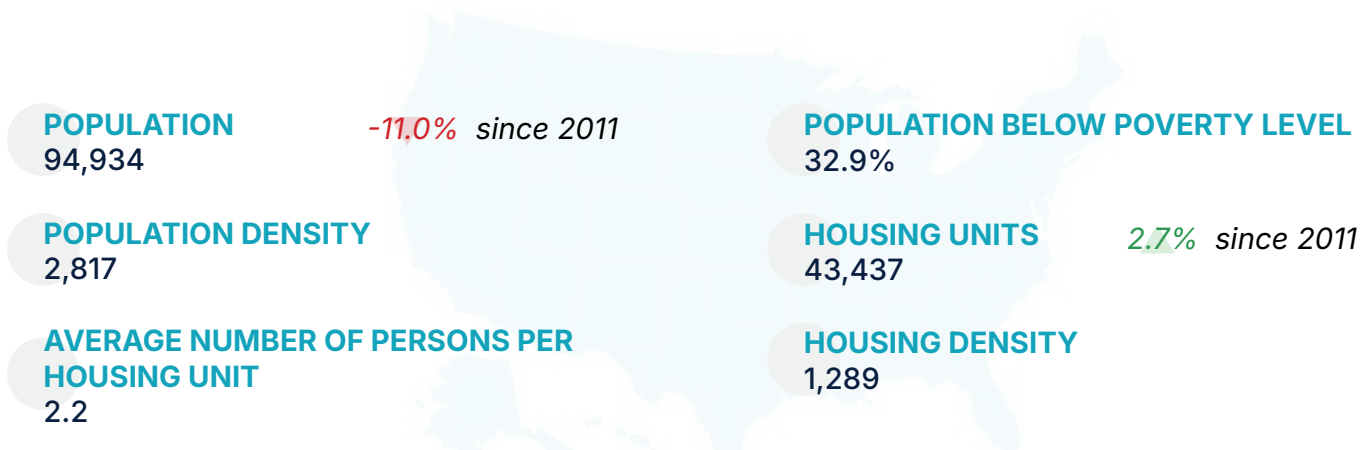
A portion of the industrial parks and commercial buildings in El Paso is located immediately north of the border and along the I-10 corridor. BOTA is connected to the regional highway network by I-110, which links the port to I-10, U.S. Highway 62, and U.S. Highway 54 in El Paso. On the Mexican side, the port provides access to Federal Highway 45 in Ciudad Juárez, with large industrial parks in the same three-mile radius, and maintains direct connections to the international transportation network. The proximity of these industrial clusters on both sides of the border highlights BOTA's role in supporting cross-border trade, supply chains, and regional economic integration.

The industrial base surrounding BOTA is highly diversified, serving manufacturers and distribution facilities across multiple sectors. Nearby operations include automotive parts suppliers, electronics manufacturers, microphone and audio equipment producers, industrial hose and home product manufacturers, as well as warehouses handling fresh produce, food products, and other consumer goods. This product diversity makes BOTA a critical gateway for a broad range of cross-border supply chains, particularly for companies requiring proximity to central Ciudad Juárez and El Paso.

BOTA CONNECTS MAJOR INDUSTRIAL CLUSTERS IN EL PASO & CIUDAD JUÁREZ

BOTA SERVES DIVERSE CROSS-BORDER MANUFACTURING & DISTRIBUTION INDUSTRIES

Figure 16. Key U.S. Demographic Facts within BOTA PoE 3-Mile Radius



Note: The three-mile radius surrounding BOTA on the U.S. side encompasses all of ZIP Codes 79901 and 79903, and partially overlaps with ZIP Codes 79902, 79905, 79906, and 79930.

Source: The Hunt Institute using data from the U.S. Census Bureau (2024).

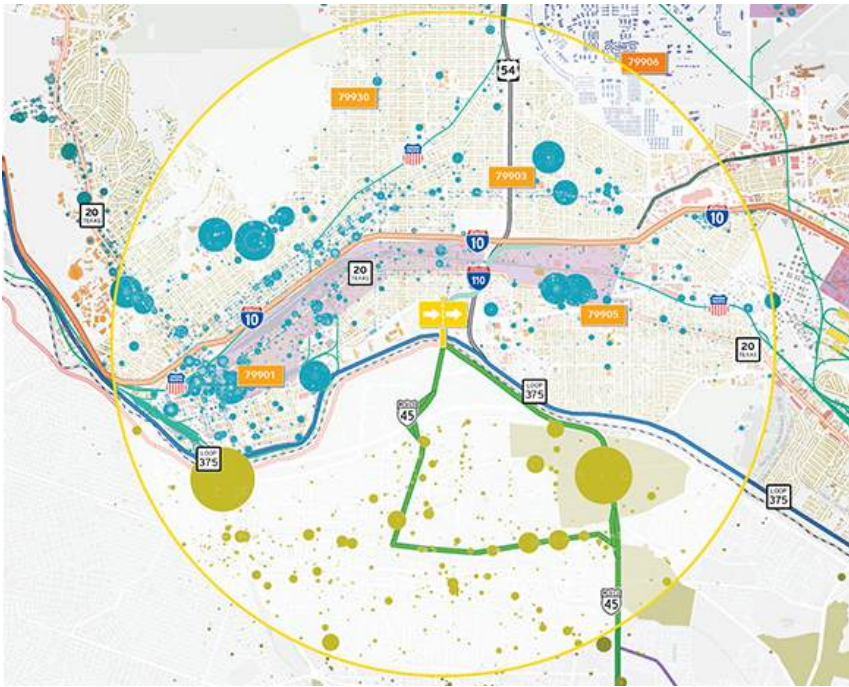
Key Demographic Characteristics

Figure 16 summarizes the key demographic characteristics within a three-mile radius of BOTA. On the U.S. side, 94,934 residents live within the study area, occupying 43,437 housing units. Although the number of housing units has increased by 2.7% since 2011, the resident population has declined by approximately 11% over the same period. Among the four PoEs study areas, the BOTA study area has the highest proportion of residents living below the federal poverty level, at 32.9%.

BOTA study area is also the most densely populated among the four PoEs in the Paso del Norte region, with 2,817 persons and 1,289 housing units per square mile.



Map 8. Businesses by Employment within BOTA PoE 3-Mile Radius



BUSINESSES IN EL PASO

14,952

BUSINESS DENSITY IN EL PASO

444

BUSINESSES IN CIUDAD JUÁREZ

1,050

Source: The Hunt Institute using data from Dun & Bradstreet.

Business Characteristics

Map 8 illustrates the spatial distribution of businesses by employment within a three-mile radius of BOTA. The size of each blue point represents the relative employment of individual businesses, demonstrating the concentration of major employers and commercial activity surrounding the port.

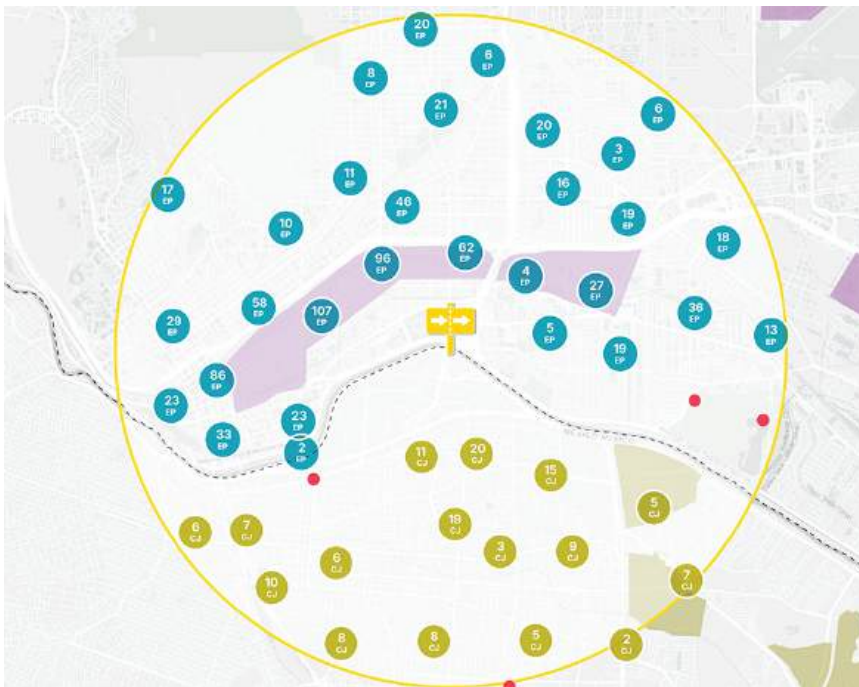
The analysis identifies 14,952 businesses on the U.S. side of the study area, representing a business density of 444 establishments per square mile. This is the highest business density among the four PoEs in the Paso del Norte region.

These businesses are concentrated along the I-10 corridor, downtown El Paso, and the industrial and commercial parks adjacent to BOTA. The study area includes a diverse mix of manufacturers, logistics companies, warehouses, wholesale distributors, retailers, healthcare facilities, and service providers supporting cross-border trade.

On the Mexican side, 1,050 businesses are located within the three-mile study area surrounding BOTA. Although fewer in number than those on the U.S. side, these establishments include manufacturing facilities and maquiladora operations. These firms are closely integrated with suppliers, distribution centers, and transportation services in El Paso.

**BOTA HAS THE HIGHEST
BUSINESS DENSITY AMONG
PDN'S POES**

Map 9. Manufacturing & Transportation & Warehousing Businesses within BOTA PoE 3-Mile Radius



EL PASO

849 Businesses or 5.7%

CIUDAD JUÁREZ

138 Businesses or 13.1%

Source: The Hunt Institute using data from Dun & Bradstreet.

Within the three-mile study area, 849 transportation, warehousing, and manufacturing businesses in El Paso (5.7% of all businesses) and 138 comparable businesses in Ciudad Juárez (13.1% of all businesses) stand to be potentially impacted by the loss of commercial trucking operations. Because these industries rely on frequent and reliable cross-border freight movement, diverting commercial traffic to other PoEs would likely increase travel distances, transportation costs, border crossing times, and overall supply chain complexity. These impacts could be particularly significant for manufacturers and logistics providers that depend on just-in-time production systems and time-sensitive deliveries.



Figure 17. Border Trade & Crossings through BOTA, 2025



TOTAL EXPORTS BY TRUCK
\$9.2 Billion

12.9% since 2024



TOTAL IMPORTS BY TRUCK
\$2.8 Billion

27.9% since 2024



COMMERCIAL CROSSINGS
164,255

22.7% since 2024

**BOTA TRUCK TRADE &
BORDER CROSSINGS
INCREASED SINCE 2024**



NONCOMMERCIAL CROSSINGS
18.6 Million

4.1% since 2024

Note: Commercial crossings include the number of trucks. Noncommercial crossings include the number of private vehicle passengers, bus passengers, and pedestrians.

Source: The Hunt Institute using data from the U.S. Bureau of Transportation Statistics.

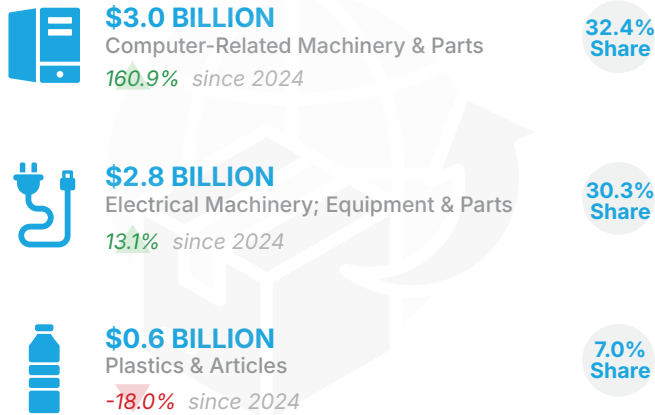
Border Trade & Crossings

Figure 17 summarizes the total trade by truck and border crossings for BOTA in 2025. Commercial trade through BOTA increased in 2025. Truck exports reached \$9.2 billion, representing a 12.9% increase compared to 2024, while truck imports totaled \$2.8 billion, increasing by 27.9% over the previous year. Together, these figures reflect approximately \$12 billion in two-way truck trade.

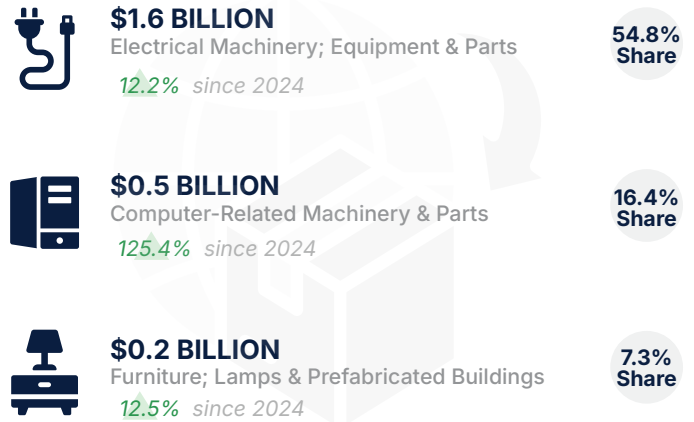
Commercial crossing counts also demonstrated growth in 2025. BOTA processed 164,255 commercial truck crossings, a 22.7% increase from 2024. Separately, BOTA remains one of the region's busiest international crossings for noncommercial traffic. In 2025, the port accommodated approximately 18.6 million noncommercial crossings, comprising private vehicle passengers, pedestrians, and bus passengers, representing a 4.1% increase over the previous year.

Figure 18. Top Traded Commodities by Truck through BOTA, 2025

Exports



Imports



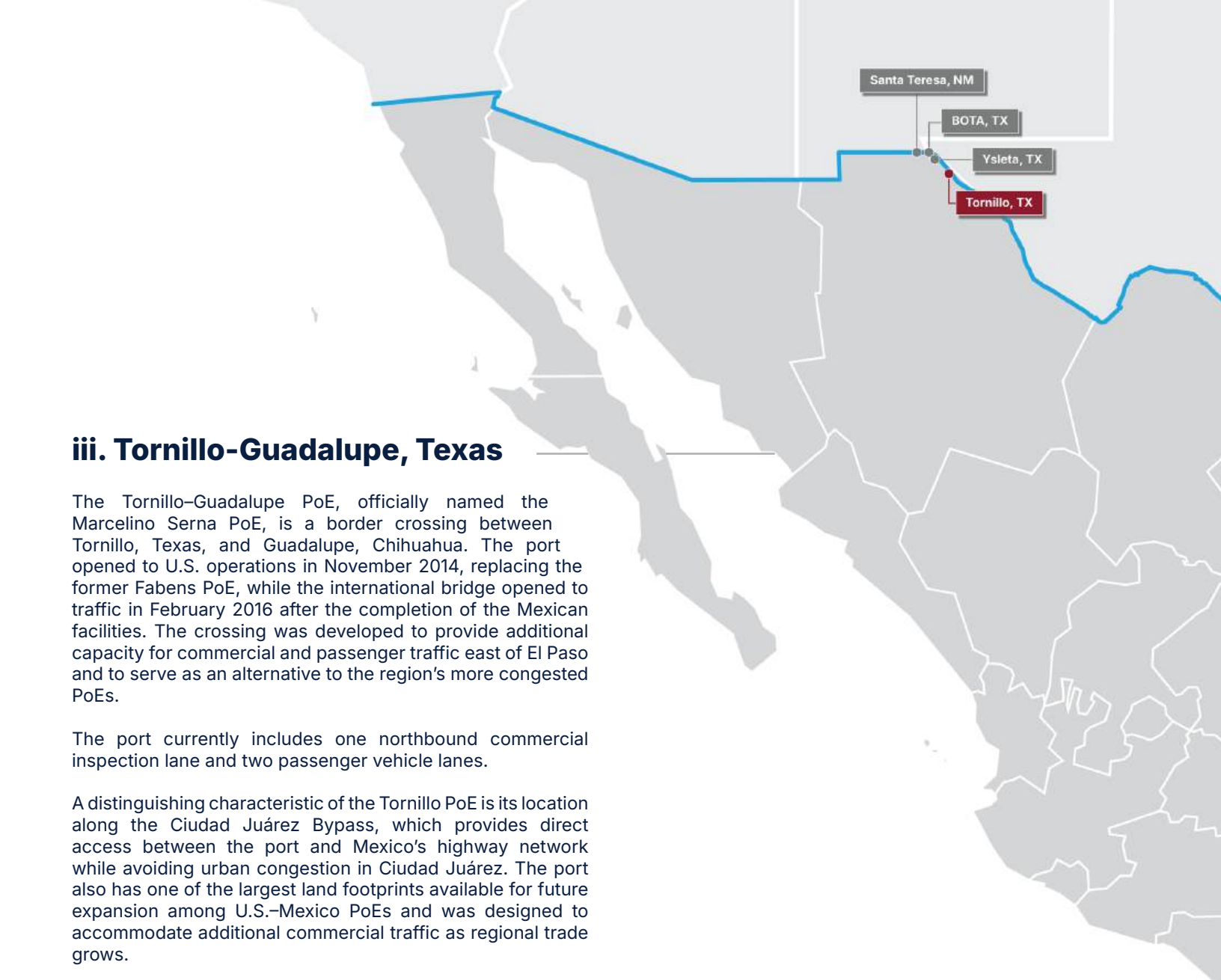
Source: The Hunt Institute using data from the U.S. Bureau of Transportation Statistics.

Figure 18 presents the leading commodities transported by truck through BOTA in 2025. The commodity profile indicates that the port handles freight associated with electronics, computer equipment, and other high-value manufactured products moving through cross-border supply chains between the United States and Mexico.

On the export side, computer-related machinery and parts ranked as the largest commodity, totaling \$3 billion and accounting for 32.4% of all truck exports through BOTA. Export value in this category increased by 160.9% compared to 2024. Electrical machinery, equipment, and parts followed closely, at \$2.8 billion, representing 30.3% of total exports and increasing by 13.1% over the previous year. Together, these two categories accounted for nearly 63% of all truck exports through BOTA. Plastics and articles, valued at \$0.6 billion (7% of exports), ranked third despite experiencing an 18% decline from 2024.

Imports through BOTA exhibit a similarly concentrated commodity mix. Electrical machinery, equipment, and parts were the leading category, totaling \$1.6 billion and accounting for 54.8% of all imports, while increasing 12.2% from the previous year. Computer-related machinery and parts ranked second with \$0.5 billion (16.4%), recording a 125.4% increase. Furniture, lamps, and prefabricated buildings ranked third at \$0.2 billion, representing 7.3% of imports and increasing 12.5% over 2024.

BOTA TRUCK TRADE IS HIGHLY CONCENTRATED IN COMPUTER-RELATED & ELECTRICAL MACHINERY, ACCOUNTING FOR 62.7% OF EXPORTS AND 71.2% OF IMPORTS



iii. Tornillo-Guadalupe, Texas

The Tornillo-Guadalupe PoE, officially named the Marcelino Serna PoE, is a border crossing between Tornillo, Texas, and Guadalupe, Chihuahua. The port opened to U.S. operations in November 2014, replacing the former Fabens PoE, while the international bridge opened to traffic in February 2016 after the completion of the Mexican facilities. The crossing was developed to provide additional capacity for commercial and passenger traffic east of El Paso and to serve as an alternative to the region's more congested PoEs.

The port currently includes one northbound commercial inspection lane and two passenger vehicle lanes.

A distinguishing characteristic of the Tornillo PoE is its location along the Ciudad Juárez Bypass, which provides direct access between the port and Mexico's highway network while avoiding urban congestion in Ciudad Juárez. The port also has one of the largest land footprints available for future expansion among U.S.-Mexico PoEs and was designed to accommodate additional commercial traffic as regional trade grows.

Hours of Operation (Commercial Lanes)

- Monday to Friday 8:00 am- 4:00 pm
- Closed on Saturday and Sunday

PRIVATE VEHICLE LANES

2

COMMERCIAL LANES

1

Map 10. Land Use & Connectivity within Tornillo PoE 3-Mile Radius



Source: The Hunt Institute.

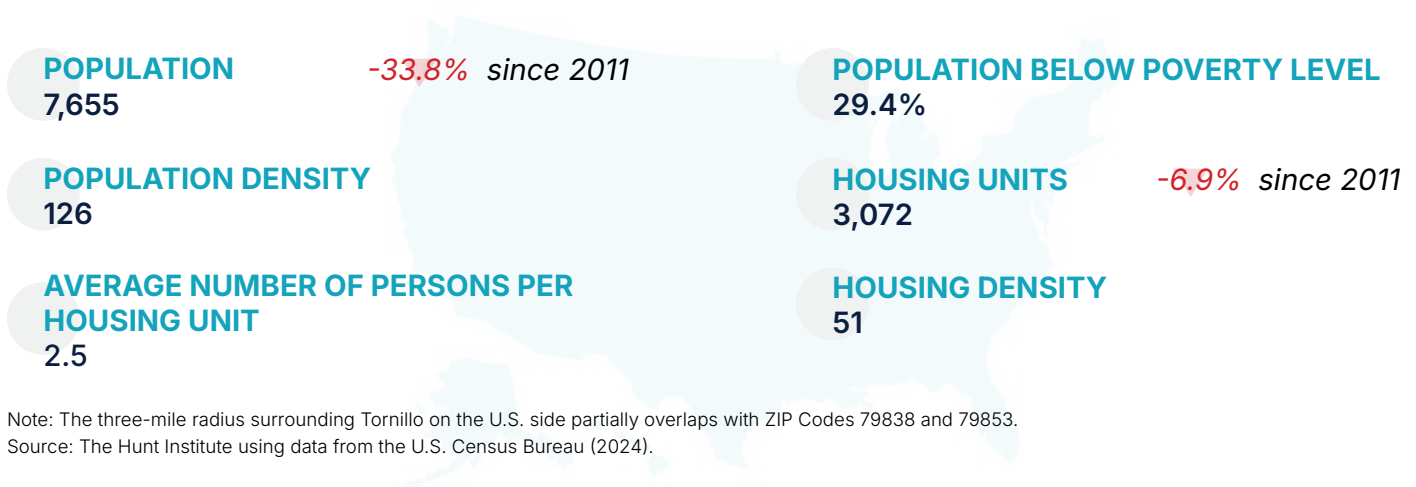
Land Use Composition, Transportation & Major Industrial Parks

Map 10 indicates the land use composition, transportation network, and regional connectivity within a three-mile radius of the Tornillo-Guadalupe (Tornillo) PoE. The Tornillo study area is characterized by a predominantly rural landscape with limited urban development, low-density residential communities, and relatively little industrial activity immediately surrounding the port. Nevertheless, it serves an important logistics function by attracting freight originating in the state of Chihuahua and surrounding municipalities, particularly shipments traveling to or from central and southern Chihuahua. The port offers an alternative commercial route for carriers seeking to avoid congestion at the more heavily utilized urban crossings, although its distance from the main manufacturing clusters in Ciudad Juárez limits its use for some maquiladora operations.

On the U.S. side, the study area consists primarily of agricultural land, vacant land, and limited residential development. The port is connected to the regional highway network, Texas State Highway 20 (Alameda Avenue) and I-10, via FM 3380. The study area is also served by the Union Pacific Railroad.

On the Mexican side, the port connects directly to Federal Highway 45, one of Mexico's principal north-south freight corridors linking Ciudad Juárez with Chihuahua City and central Mexico. Although there are currently few industrial parks or major commercial developments within the three-mile study area, the surrounding area contains undeveloped land suitable for future industrial, logistics, and warehousing investments. The availability of land may encourage the expansion of freight-related activities as regional trade continues to grow.

Figure 19. Key U.S. Demographic Facts within Tornillo PoE 3-Mile Radius



Key Demographic Characteristics

Figure 19 summarizes the key demographic characteristics within a three-mile radius of the Tornillo PoE. The Tornillo study area is characterized by a sparse population, low-density development, and predominantly rural land uses.

On the U.S. side, 7,655 residents live within the study area, occupying 3,072 housing units. Since 2011, the population has declined by 33.8%, while the number of housing units has decreased by 6.9%. Moreover, 29.4% of residents live below the federal poverty level. The study area has a population density of only 126 persons per square mile and a housing density of 51 units per square mile, making it the least densely populated of the port study areas in the Paso del Norte region.



Map 11. Businesses By Employment within Tornillo PoE 3-Mile Radius



BUSINESSES IN EL PASO

319

BUSINESS DENSITY IN EL PASO

5

BUSINESSES IN CIUDAD JUÁREZ

3

Source: The Hunt Institute using data from Dun & Bradstreet.

Business Characteristics

Map 11 illustrates the spatial distribution of businesses by employment within a three-mile radius of the Tornillo PoE. A total of 319 businesses are located on the U.S. side of the three-mile radius, representing a business density of five businesses per square mile, the lowest business density among the four major PoEs in the Paso del Norte region. Most businesses are small commercial establishments, agricultural operations, transportation-related services, and local retail and service providers that support nearby communities.

On the Mexican side, only three businesses are located within the three-mile study area, reflecting the absence of significant commercial or industrial development immediately adjacent to the port. While the current business base is limited, the surrounding area contains extensive undeveloped land that could accommodate future industrial parks, logistics centers, warehousing, and manufacturing facilities as cross-border trade continues to expand.

Figure 20. Border Trade & Crossings through Tornillo PoE, 2025



TOTAL EXPORTS BY TRUCK
\$0.02 Billion

51.1% since 2024



TOTAL IMPORTS BY TRUCK
\$3.2 Billion

243.8% since 2024



COMMERCIAL CROSSINGS
36,675

76.0% since 2024



NONCOMMERCIAL CROSSINGS
1.7 Million

9.8% since 2024

**TORNILLO TRUCK TRADE
AND BORDER CROSSINGS
INCREASED SINCE 2024**

Note: Commercial crossings include the number of trucks. Noncommercial crossings include the number of private vehicle passengers, bus passengers, and pedestrians.

Source: The Hunt Institute using data from the U.S. Bureau of Transportation Statistics.

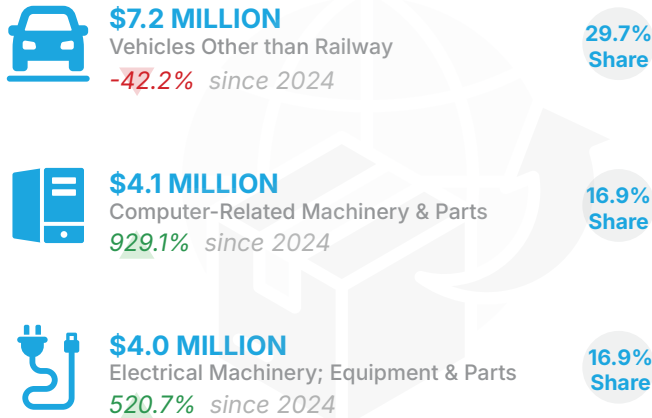
Border Trade & Crossings

Figure 20 summarizes the trade by trucks and border crossings through the Tornillo PoE in 2025. In 2025, truck exports through Tornillo totaled \$0.02 billion, reflecting a 51.1% increase over 2024. Truck imports reached \$3.2 billion, up 243.8% from the previous year.

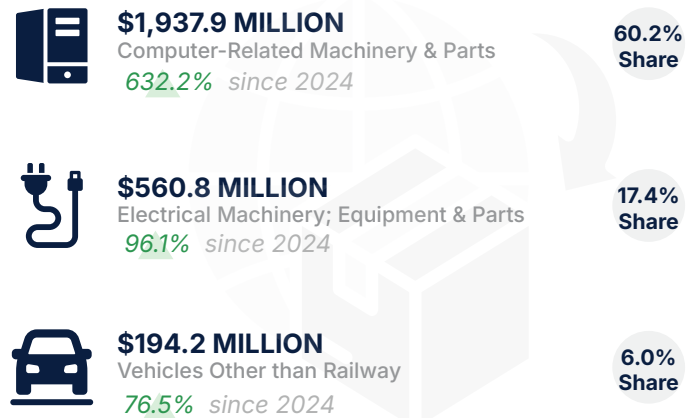
Commercial vehicle traffic also increased during the year. The port processed 36,675 commercial truck crossings in 2025, a 76% increase from 2024. Additionally, Tornillo recorded 1.7 million noncommercial crossings in 2025, an increase of 9.8% over the previous year.

Figure 21. Top Traded Commodities by Truck through Tornillo PoE, 2025

Exports



Imports



Source: The Hunt Institute using data from the U.S. Bureau of Transportation Statistics.

Figure 21 presents the leading commodities transported by truck through the Tornillo PoE in 2025. Although Tornillo handles a smaller volume of trade than BOTA, Ysleta, and Santa Teresa, its commodity profile reflects the port's growing role in supporting advanced manufacturing supply chains and regional trade diversification.

On the export side, vehicles other than railway were the leading commodity, totaling approximately \$7.2 million and accounting for 29.7% of total truck exports through Tornillo. Despite remaining the largest export category, its value declined 42.2% compared with 2024. In contrast, exports of computer-related machinery and parts increased to approximately \$4.1 million, constituting 16.9% of total exports and recording a 929.1% increase over the previous year. Electrical machinery, equipment, and parts also accounted for 16.9% of exports, increasing 520.7% from 2024.

On the import side, trade is concentrated in high-value manufactured products. Computer-related machinery and parts led imports, totaling \$1.9 billion and accounting for 60.2% of all truck imports through the port. This category increased by 632.2% compared with 2024, indicating a shift in the commodities moving through Tornillo. Electrical machinery, equipment, and parts ranked second at \$560.8 million (17.4%), increasing 96.1% over the previous year. Vehicles other than railway were the third-largest import category, totaling \$194.2 million (6%) and increasing 76.5% from 2024.

ii. Ysleta-Zaragoza, Texas

The Ysleta-Zaragoza PoE opened in 1938 following the Rio Grande Rectification Project. It was first rebuilt in 1955 to accommodate increasing traffic and was then completely rebuilt in 1990. The current port structure consists of separate bridges for commercial and noncommercial traffic, serving as the primary commercial crossing in the Paso del Norte region.

The U.S. port currently has six northbound commercial inspection lanes, 10 passenger vehicle inspection lanes, two FAST lanes, and two SENTRI lanes.³⁰ Passenger vehicle traffic operates 24 hours a day.

A distinguishing characteristic of the Ysleta-Zaragoza PoE is that it is the largest commercial cargo crossing in the Paso del Norte region. The port is adjacent to a concentration of manufacturing facilities, warehouses, and industrial parks on both sides of the border, and it handles hazmat and inbound shipments. On the Mexican side, governmental agencies, the National Agri-Food Health, Safety and Quality Service (SENASICA) and the Federal Attorney for Environmental Protection (PROFEPA), help process such specialized cargo.³¹

Hours of Operation (Commercial Lanes)

- Monday to Friday 6:00 am- 11:00 pm
- Saturday 6:00 am- 2:00 pm
- Closed Sunday

PRIVATE VEHICLE LANES

10

COMMERCIAL LANES

6

FAST LANES

2

³⁰ The Secure Electronic Network for Travelers Rapid Inspection (SENTRI) is a CBP program that allows expedited clearance for pre-approved, low-risk travelers upon arrival in the United States.

³¹ SENASICA is a Mexican government agency that protects agriculture, livestock, and food safety and PROFEPA is a Mexican agency that enforces environmental laws, stops illegal logging, and protects wildlife.

a. Socioeconomic Profile

Map 12. Land Use & Connectivity within Ysleta PoE 3-Mile Radius



Source: The Hunt Institute.

Land Use Composition, Transportation & Major Industrial Parks

Map 12 illustrates the land use composition, transportation network, and major industrial parks within a three-mile radius of the Ysleta-Zaragoza PoE (Ysleta PoE). This map defines the integration of residential neighborhoods, industrial parks, and regional transportation corridors that support one of the busiest commercial gateways in the Paso del Norte region.

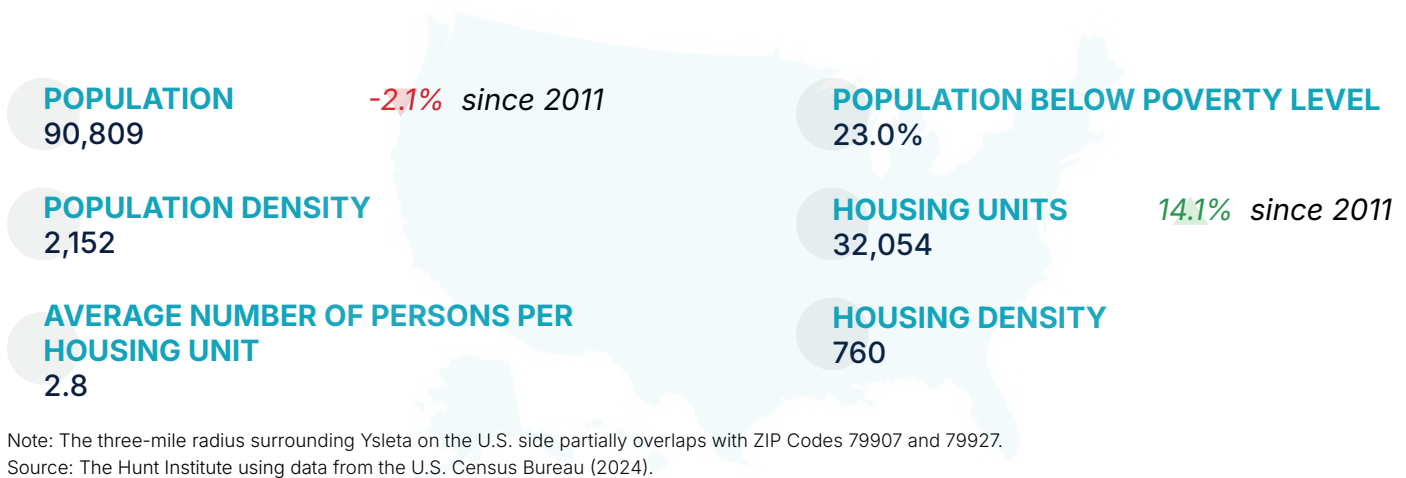
The industrial corridor surrounding the Ysleta PoE stands as one of the largest manufacturing cores in the region. It is home to major maquiladora operations producing electronics, AI servers and data center equipment, automotive components, medical devices, electrical equipment, and other manufactured products. The area also includes suppliers, distribution centers, and logistics providers that support just-in-time manufacturing, making the port a preferred crossing for high-volume commercial traffic.

On the U.S. side, the study area is characterized by a mix of residential, commercial, and industrial land use. Residential neighborhoods occupy a majority of the area surrounding the port, while large industrial parks are concentrated east and southeast of the crossing, adjacent to Loop 375 and I-10.

The transportation network provides access to regional and interstate routes used for freight transportation. Loop 375 serves as the principal east-west corridor linking the Ysleta PoE with I-10, while highway Texas 20 (Alameda Avenue) provides direct access to industrial parks and commercial areas. The study area is also used by the Union Pacific Railroad, providing rail access for manufacturers to national rail networks.

On the Mexican side, industrial parks are located a small distance south of the Ysleta PoE, extending along Boulevard Manuel Gómez Morín and connecting directly to Federal Highway 2. These industrial developments contain numerous maquiladora manufacturing facilities specializing in automotive components, electronics, medical devices, and other export-oriented industries. Their proximity to the port enables the rapid movement of raw materials, intermediate goods, and finished products between production facilities in Ciudad Juárez and distribution centers in the United States.

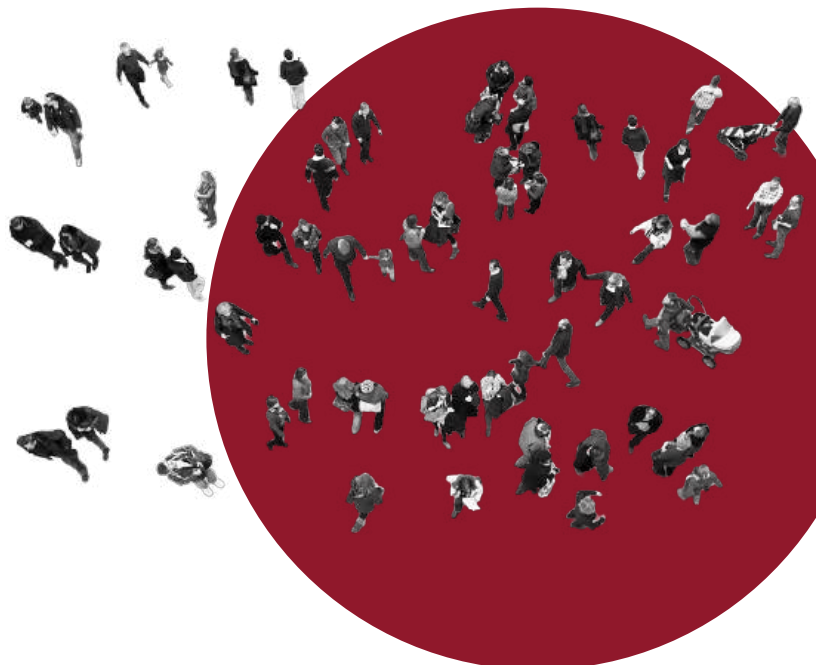
Figure 22. Key U.S. Demographic Facts within Ysleta PoE 3-Mile Radius



Key Demographic Characteristics

Figure 22 summarizes the key demographic characteristics within a three-mile radius of the Ysleta PoE. The study area encompasses densely populated residential communities on both sides of the U.S.–Mexico border.

On the U.S. side, approximately 90,809 residents live within the study area, occupying 32,054 housing units. Although the population has declined slightly by 2.1% since 2011, the number of housing units has increased by 14.1%, indicating continued residential development and changing household characteristics. Approximately 23% of residents live below the federal poverty level, a lower share than that observed around BOTA. Population and housing densities of 2,152 persons and 760 housing units per square mile, respectively, make the Ysleta study area less densely populated than BOTA corridor, yet still a well-established urban environment.



Map 13. Businesses by Employment within Ysleta PoE 3-Mile Radius



BUSINESSES IN EL PASO

5,638

BUSINESS DENSITY IN EL PASO

134

BUSINESSES IN CIUDAD JUÁREZ

1,823

Source: The Hunt Institute using data from Dun & Bradstreet.

Business Characteristics

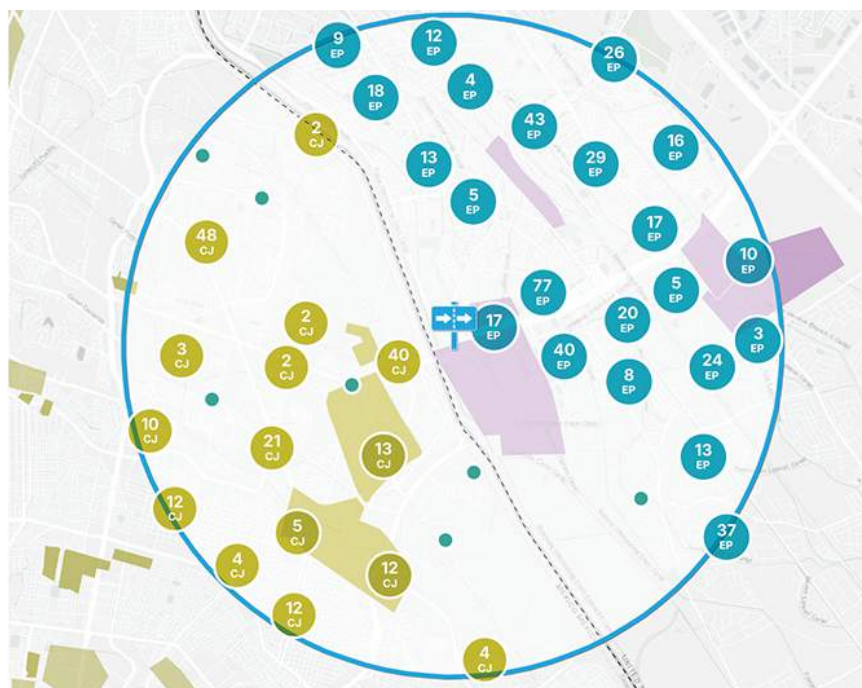
Map 13 illustrates the spatial distribution of businesses by employment within a three-mile radius of the Ysleta PoE. The size of each blue point represents the relative employment at an individual business.

Approximately 5,638 businesses are located on the U.S. side of the study area, representing a business density of 134 establishments per square mile. By comparison, the Ysleta study area has a lower concentration of businesses than BOTA. Business activity is concentrated along Loop 375, I-10, and the industrial corridors adjacent to the port. The study area supports a diverse mix of manufacturers, transportation and logistics companies, warehousing and distribution centers, wholesale trade, retail businesses, and health care firms that contribute to both the regional economy and cross-border commerce.

On the Mexican side, 1,823 businesses are located within the three-mile study area surrounding the Ysleta PoE. These establishments include many of Ciudad Juárez's major maquiladora facilities, logistics providers, customs brokers, and freight-related businesses that rely on efficient access to the border crossing.

**YSLETA IS SURROUNDED BY
MANUFACTURING & LOGISTICS
ACTIVITY**

Map 14. Manufacturing & Transportation & Warehousing Businesses within Ysleta PoE 3-Mile Radius



EL PASO
447 Businesses or 7.9%

CIUDAD JUÁREZ
198 Businesses or 10.9%

Source: The Hunt Institute using data from Dun & Bradstreet.

Within the study area, 447 transportation, warehousing, and manufacturing businesses are located on the El Paso side of the border, representing 7.9% of all businesses within the three-mile radius. On the Ciudad Juárez side, 198 businesses in these same industries account for 10.9% of all businesses.

The concentration of these freight-dependent industries on both sides of the border underscores the importance of the Ysleta PoE to the regional economy. Manufacturers, logistics providers, and distribution centers depend on reliable commercial truck operations to move raw materials, intermediate goods, and finished products across the border. If commercial truck operations at BOTA were discontinued and a majority of truck traffic were diverted to the Ysleta PoE, additional freight demand could increase pressure on the port's operational capacity. Higher commercial vehicle volumes may contribute to increased congestion and longer border crossing times, which could affect transportation costs, delivery schedules, and supply chain operations, particularly for manufacturers using just-in-time production and inventory management systems.



Figure 23. Border Trade & Crossings through Ysleta PoE, 2025



TOTAL EXPORTS BY TRUCK
\$38.6 Billion

33.3% since 2024



TOTAL IMPORTS BY TRUCK
\$73.8 Billion

35.6% since 2024



COMMERCIAL CROSSINGS
641,729

-4.3% since 2024



NONCOMMERCIAL CROSSINGS
8.5 Million

10.0% since 2024

**YSLETA TRUCK TRADE
INCREASED DESPITE
A SLIGHT DECLINE IN
TRUCK CROSSINGS**

Note: Commercial crossings include the number of trucks. Noncommercial crossings include the number of private vehicle passengers, bus passengers, and pedestrians.

Source: The Hunt Institute using data from the U.S. Bureau of Transportation Statistics.

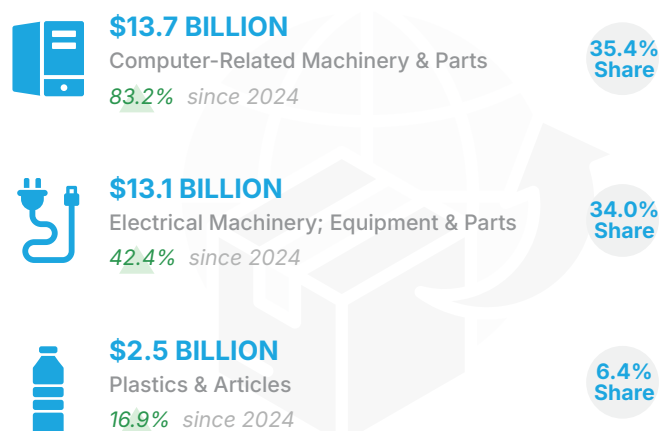
Border Trade & Crossings

Figure 23 summarizes the total trade by truck and border crossings through the Ysleta PoE for 2025. Commercial trade by truck through the Ysleta PoE continued to expand in 2025. Truck exports totaled \$38.6 billion, representing a 33.3% increase compared to 2024, while truck imports reached \$73.8 billion, increasing by 35.6% over the previous year. Combined, the port handled \$112.4 billion in two-way truck trade, underscoring its critical role in facilitating North American manufacturing supply chains and international commerce. Compared with BOTA, the Ysleta PoE processes larger trade volumes, reflecting its specialization in commercial freight operations and its strategic location adjacent to major industrial parks in both El Paso and Ciudad Juárez.

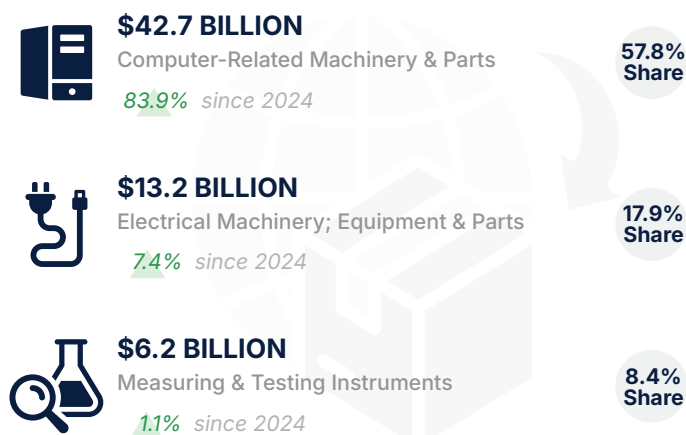
Ysleta PoE also handled 641,729 commercial truck crossings during 2025. Although this represented a 4.3% decline from 2024, the reduction in truck crossings occurred alongside increases in trade value, suggesting that the average value of goods transported per truck increased during the year. This trend may reflect continued growth in higher-value manufactured products, including electronics, automotive components, and medical devices, which dominate cross-border trade in the Paso del Norte region.

Figure 24. Top Traded Commodities by Truck through Ysleta PoE, 2025

Exports



Imports



Source: The Hunt Institute using data from the U.S. Bureau of Transportation Statistics.

Figure 24 presents the leading commodities transported by truck through the Ysleta PoE in 2025. The commodity profile is heavily concentrated in high-value manufactured products, including electronics, medical devices, and technology-related commodities.

On the export side, computer-related machinery and parts were the leading commodity, totaling \$13.7 billion and accounting for 35.4% of all truck exports through Ysleta land port. Export value in this category increased by 83.2% compared to 2024. Electrical machinery, equipment, and parts ranked second, with \$13.1 billion in exports, representing 34% of the total and increasing 42.4% over the previous year. Together, these two commodity groups accounted for nearly 70% of all truck exports. Plastics and articles ranked third at \$2.5 billion (6.4%), increasing 16.9% from 2024.

On the import side, computer-related machinery and parts led trade through the port, totaling \$42.7 billion and accounting for 57.8% of all truck imports. This category recorded an 83.9% increase over 2024. Electrical machinery, equipment, and parts followed with \$13.2 billion, representing 17.9% of imports and increasing 7.4% from the previous year. Measuring and testing instruments ranked third, totaling \$6.2 billion (8.4%).

COMPUTER-RELATED & ELECTRICAL MACHINERY DOMINATE TRUCK TRADE THROUGH YSLETA, ACCOUNTING FOR 69.4% OF EXPORTS & 75.7% OF IMPORTS



iv. Santa Teresa, New Mexico

The Santa Teresa PoE opened on January 12, 1993. The U.S. port currently has three northbound commercial inspection lanes and four passenger vehicle inspection lanes. Commercial cargo operations are conducted Monday through Friday from 6:00 a.m. to 10:00 p.m.

A distinguishing characteristic of the Santa Teresa PoE is its location within a logistics and industrial corridor. Unlike the urban ports in El Paso, Santa Teresa has land available for expansion and is directly connected to I-10 via the Pete V. Domenici Highway. The port handles oversized and overweight cargo, and serves livestock crossings, making it one of the few U.S.-Mexico land ports equipped to handle both commercial freight and live animal imports.

Hours of Operation (Commercial Lanes)

- Monday to Friday 6:00 am- 10:00 pm
- Closed on Saturday and Sunday

PRIVATE VEHICLE LANES

4

COMMERCIAL LANES

3

a. Socioeconomic Profile

Map 15. Land Use & Connectivity within the Santa Teresa PoE 3-Mile Radius



Source: The Hunt Institute.

Land Use Composition, Transportation & Major Industrial Parks

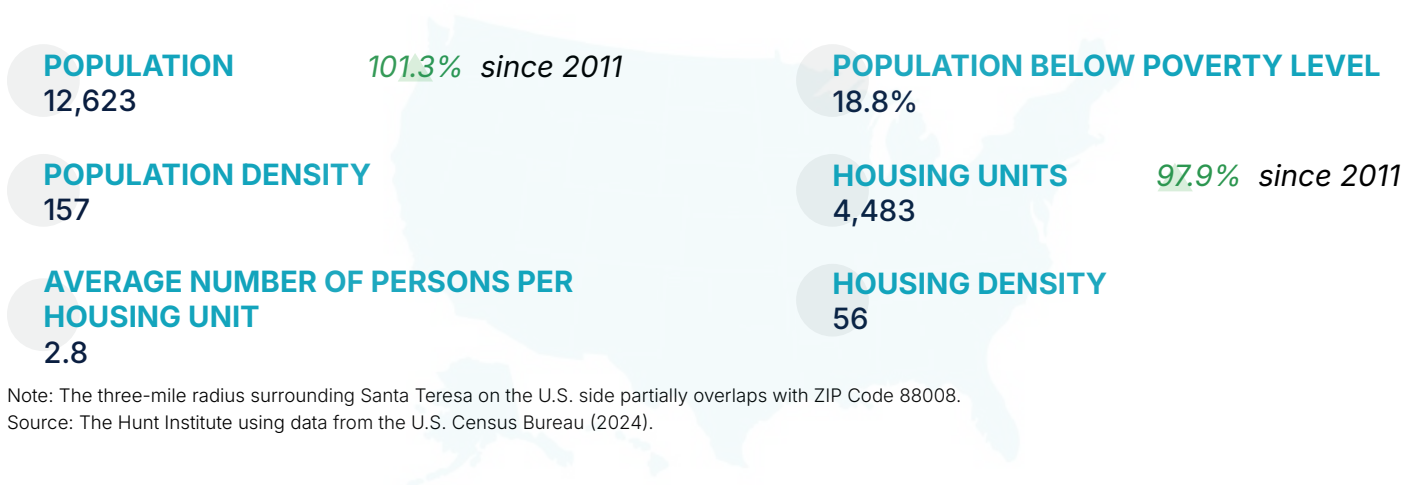
Map 15 illustrates the land use composition, transportation network, and major industrial areas within a three-mile radius of the Santa Teresa PoE. Unlike BOTAs and the Ysleta PoEs, the Santa Teresa study area is characterized by few industrial parks and an undeveloped landscape, with very limited residential or commercial development immediately surrounding the port.

The Santa Teresa PoE serves a distinct mix of industries and cargo types. The surrounding area hosts manufacturers of computers, servers, and other advanced electronics, while the port has also developed a specialized role in handling oversized and overweight cargo, industrial equipment, and livestock movements. The port's available land, rail connectivity, and commercial infrastructure provide capacity for freight operations that may be less suitable for urban land ports.

On the U.S. side, the study area consists primarily of vacant land and two industrial parks. The principal transportation corridor is New Mexico State Highway 136, which provides direct access between the PoE and I-10. This corridor is suitable for accommodating heavy tractor-trailers and providing ready access to I-10 northwest of El Paso.

On the Mexican side, the port connects directly to Federal Highway 2 and the Carretera Anapra-San Jerónimo, providing access to the San Jerónimo Industrial Park and the regional highway network serving Ciudad Juárez. The availability of undeveloped land surrounding the port may accommodate future industrial and logistics development.

Figure 25. Key U.S. Demographic Facts within Santa Teresa PoE 3-Mile Radius



Note: The three-mile radius surrounding Santa Teresa on the U.S. side partially overlaps with ZIP Code 88008.
Source: The Hunt Institute using data from the U.S. Census Bureau (2024).

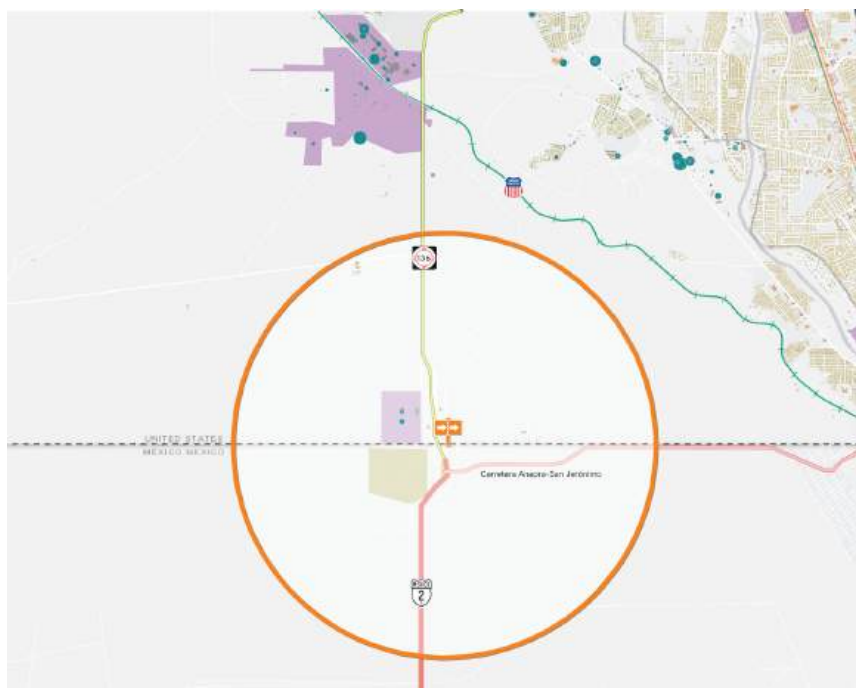
Key Demographic Characteristics

Figure 25 summarizes the key demographic characteristics within a three-mile radius of the Santa Teresa PoE. Unlike BOTA and the Ysleta PoEs, the Santa Teresa study area is sparsely populated and characterized primarily by industrial and undeveloped land. The limited residential population surrounding the port is consistent with its role as a freight-oriented crossing serving commercial transportation.

On the U.S. side, 12,623 residents live within the study area, occupying 4,483 housing units. Since 2011, the population has increased by 101.3%, while the number of housing units has grown by 97.9%, making Santa Teresa the fastest-growing port study area in the Paso del Norte region. Despite this rapid growth, the surrounding area remains relatively rural, with a population density of only 157 persons per square mile and a housing density of 56 units per square mile, significantly lower than those observed around BOTA and the Ysleta PoE. Additionally, 18.8% of residents live below the federal poverty level.



Map 16. Businesses By Employment within Santa Teresa PoE 3-Mile Radius



Source: The Hunt Institute from Dun & Bradstreet.

BUSINESSES IN EL PASO
875

BUSINESS DENSITY IN EL PASO
11

BUSINESSES IN CIUDAD JUÁREZ
5

Business Characteristics

Map 16 illustrates the spatial distribution of businesses by employment within a three-mile radius of the Santa Teresa PoE. The size of each blue point represents the relative employment at individual businesses. In contrast to BOTA and the Ysleta PoEs, where businesses are embedded within densely developed urban areas, businesses within a three-mile radius of Santa Teresa are very limited.

The analysis identifies 875 businesses on the U.S. side of the study area, representing a business density of 11 businesses per square mile, which is much lower than in BOTA and Ysleta. This relatively low density reflects the predominance of undeveloped land and the limited residential and commercial development immediately surrounding the port.

On the Mexican side, only five businesses are located within the three-mile study area.

Figure 26. Border Trade & Crossings through Santa Teresa PoE, 2025



TOTAL EXPORTS BY TRUCK
\$11.6 Billion

-27.4% since 2024



TOTAL IMPORTS BY TRUCK
\$21.4 Billion

-6.1% since 2024



COMMERCIAL CROSSINGS
171,932

1.6% since 2024



NONCOMMERCIAL CROSSINGS
1.5 Million

-15.6% since 2024

**SANTA TERESA TRUCK
CROSSINGS INCREASED
DESPITE LOWER TRADE
VALUES SINCE 2024**

Note: Commercial crossings include the number of trucks. Noncommercial crossings include the number of private vehicle passengers, bus passengers, and pedestrians.

Source: The Hunt Institute using data from the U.S. Bureau of Transportation Statistics.

Border Trade & Crossings

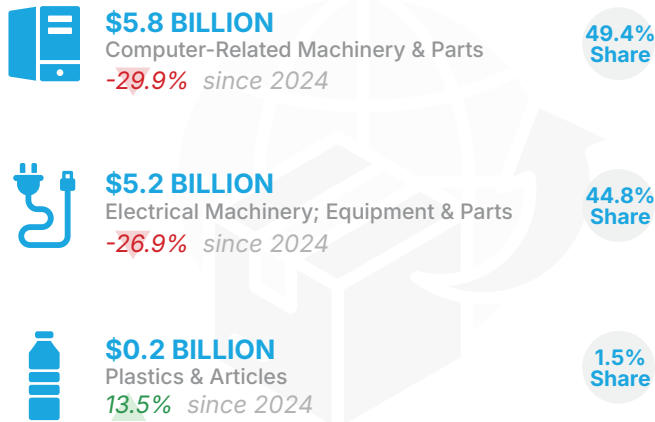
Figure 26 summarizes the total trade by truck and border crossings through the Santa Teresa PoE for 2025. In 2025, truck exports through Santa Teresa totaled \$11.6 billion, a 27.4% decrease compared to 2024. While truck imports reached \$21.4 billion, they declined by 6.1% over the same period. Combined, the port handled approximately \$33 billion in two-way truck trade. Despite the YoY decline in trade value, Santa Teresa continues to facilitate truck movement, particularly for manufacturing, automotive, agricultural, and logistics industries that have established operations in the Santa Teresa–San Jerónimo industrial corridor.

The port processed 171,932 commercial truck crossings in 2025, representing a 1.6% increase over the previous year. The increase in truck crossings, despite lower trade values, suggests changes in the composition of traded goods, shipment sizes, or logistics strategies rather than a decline in the port's operational importance. Santa Teresa continues to serve as a reliable commercial crossing, providing direct access to I-10 via New Mexico Highway 136 and to Mexico's Federal Highway 2, offering an efficient route for freight moving between northern Mexico and the southwestern United States.

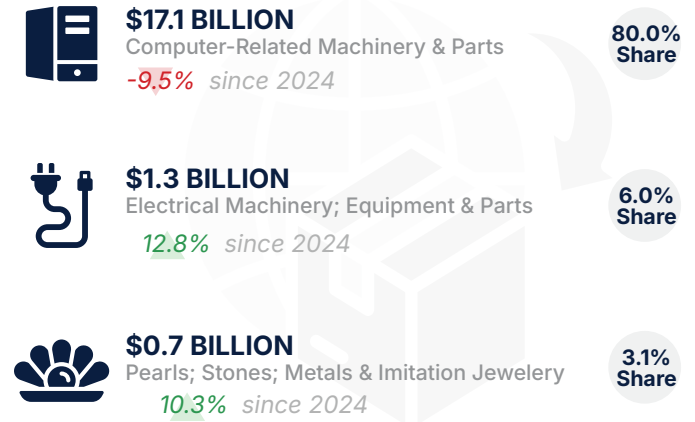
Additionally, the port recorded approximately 1.5 million noncommercial crossings, a 15.6% decrease from 2024. Passenger traffic volumes are lower than at the region's urban PoEs, consistent with the port's location outside the urban core of the El Paso–Ciudad Juárez metropolitan area and its role in commercial freight movement.

Figure 27. Top Traded Commodities by Truck through Santa Teresa PoE, 2025

Exports



Imports



Source: The Hunt Institute using data from the U.S. Bureau of Transportation Statistics.

Figure 27 presents the leading commodities transported by truck through the Santa Teresa PoE in 2025. Like the other commercial PoEs in the Paso del Norte region, trade through Santa Teresa is dominated by high-value manufactured products that support integrated North American supply chains.

On the export side, computer-related machinery and parts were the leading commodity, totaling \$5.8 billion and accounting for 49.4% of all truck exports through Santa Teresa. Despite remaining the predominant export, shipments in this category declined 29.9% compared to 2024. Electrical machinery, equipment, and parts ranked second, with \$5.2 billion in exports, accounting for 44.8% of total exports and down 26.9% from the previous year. Together, these two categories accounted for more than 94% of all truck exports. Plastics and articles ranked third, totaling \$0.2 billion (1.5%) and increasing 13.5% over 2024.

On the import side, trade is even more concentrated. Computer-related machinery and parts accounted for \$17.1 billion, comprising 80% of all truck imports through the port, despite a 9.5% decline from 2024. Electrical machinery, equipment, and parts ranked second at \$1.3 billion (6%), increasing 12.8% over the previous year. Pearls, precious stones, metals, and imitation jewelry were the third-largest import category, totaling \$0.7 billion (3.1%), with a 10.3% increase from 2024.

VII. ECONOMIC IMPACT

The analysis examines the economic impact of the construction phase of the modernization project over the four-year period from 2028 to 2031, as well as the impacts of additional noncommercial crossings and the cessation of commercial traffic at BOTA on total employment, labor income, and output between 2028 and 2036. The 2028–2036 analytical period assumes that a new PoE is unlikely to become operational within the Paso del Norte region during this timeframe. Establishing a brand-new international land border crossing or making major changes or expansions to an existing one requires federal funding allocations and, under applicable circumstances, a presidential permit.³² The process typically involves extensive economic and environmental studies, federal review, and coordination between the U.S. and Mexico. Following the completion of the required studies and permitting process, a project must proceed through design, procurement, and contractor selection before construction can begin. Recent comparable projects illustrate the lengthy timelines associated with major PoE development. The San Ysidro PoE modernization and expansion took approximately 10 years from inception to completion, while the Otay Mesa East PoE, a new international crossing that has been in development for more than 20 years, has yet to open.^{33,34}

The Hunt Institute estimated the potential economic impacts of the cessation of commercial traffic at BOTA and the expansion of noncommercial traffic lanes for the Paso del Norte region using the Impact Analysis for Planning (IMPLAN) software. The analysis considered the economic impact of the proposed modernization of the BOTA land PoE, detailed in the “Environmental Impact Statement for the Proposed Modernization of the Bridge of Americas Land Port of Entry, El Paso, Texas,” prepared by the U.S. General Services Administration (GSA) (2024).

Researchers and policymakers frequently use IMPLAN software to determine the economic impact of various spending shocks. While these spending shocks may be isolated to a specific industry, the inclusion of intersectoral linkages and economic multipliers within the IMPLAN software allows the impact of such spending shocks to spread through the regional economy. The impact is estimated sector-by-sector, allowing the total effect to be decomposed into direct, indirect, and induced effects. For example, in the construction phase, direct effects refer to the employment and income supported by the initial spending on infrastructure construction, while indirect effects are the employment and income generated as second-round spending or as purchases of goods and services from suppliers. Finally, induced effects capture gains in employment and income resulting from increased household spending, such as retail, restaurants, and hospitality, generated by the construction of expanded noncommercial traffic lanes.

While the intersectoral linkages and economic multipliers within the IMPLAN software allow users to analyze the impact of spending shocks on multiple sectors within the regional economy, there are still some limitations to the analysis.

32 Donald J. Trump, “Order on the Issuance of Permits with Respect to Facilities and Land Transportation Crossings at the International Boundaries of the United States,” Executive Order 13867, The White House, April 10, 2019, <https://trumpwhitehouse.archives.gov/presidential-actions/order-issuance-permits-respect-facilities-land-transportation-crossings-international-boundaries-united-states/>.

33 U.S. General Services Administration, “GSA Celebrates San Ysidro Land Port of Entry’s Modernization and Expansion Project Completion,” GSA Newsroom, January 24, 2020, <https://www.gsa.gov/about-gsa/newsroom/former-gsa-regional-news-archive/region-9-newsroom/feature-stories/gsa-celebrates-san-ysidro-land-port-of-entrys-modernization-and-expansion-project-completion-01242020>.

34 California Department of Transportation, “Project Spotlight: Otay Mesa East Land Port of Entry,” Mile Marker, no. 1 (2022), <https://dot.ca.gov/programs/public-affairs/mile-marker/issue1-2022/project-spotlight>.



Bridge of the Americas PoE located in El Paso, Texas

i. Construction

Methodology

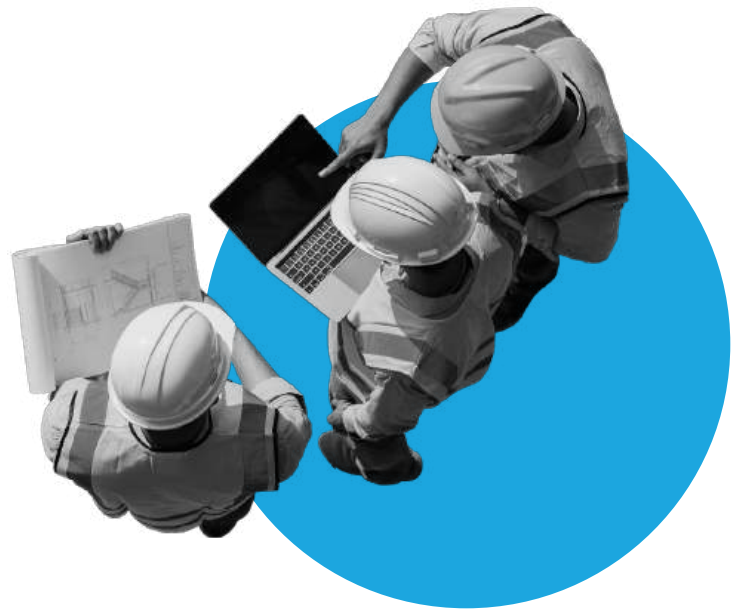
To assess the economic impact of modernizing BOTA's infrastructure, the Hunt Institute used cost estimates from the GSA's "Design-Build Services for the Bridge of the Americas (BOTA) Land Port of Entry (LPOE) Modernization Project, El Paso, Texas".³⁵ According to GSA, the estimated construction costs for this modernization project range from \$400 million to \$460 million. Construction is anticipated to start in 2028, with substantial completion by 2031.³⁶ This implies a four-year construction phase (2028, 2029, 2030, and 2031). Incorporating these cost estimates in IMPLAN requires assumptions on their timing and allocation. The Hunt Institute assumed the construction costs are equal to the midpoint of GSA's estimated construction costs (\$430 million), with the total costs evenly spread across the four years (\$107.5 million per year).

Within each year, the annual expenditures were allocated as follows:

25% to maintenance expenditure (\$26.875 million per year) on IMPLAN Industry 57 (Maintenance and repair construction of highways, streets, bridges, and tunnels).

75% to new construction (\$80.625 million per year) on IMPLAN Industry 49 (Construction of new highways and streets).

The Hunt Institute has constrained the scope of this analysis to the 2028–2036 period, based on the assumption that the Paso del Norte region is unlikely to fully realize the construction of a new PoE within that timeframe. Although the construction activity itself is limited to the 2028–2031 period, the resulting impacts are incorporated into the broader 2028–2036 study framework used throughout the Economic Impact section. This broader study period allows the temporary economic gains associated with construction to be considered alongside the longer-term effects associated with additional noncommercial crossings and the cessation of commercial cargo operations at BOTA. The broader analytical framework also reflects the study assumption that a new PoE is unlikely to become operational within the Paso del Norte region during the 2028–2036 period. The basis for this assumption is discussed in the introductory Economic Impact section. The construction impact results themselves remain unchanged regardless of whether they are presented within the 2028–2031 construction period or the full 2028–2036 study period.



³⁵ "Design-Build Services for the Bridge of the Americas (BOTA) Land Port of Entry (LPOE) Modernization Project, El Paso, Texas," U.S. General Services Administration's (GSA's) System for Award Management, accessed June 25th, 2026: <https://sam.gov/workspace/contract/opp/14bcd720d898461b8fccef4574fc5de5/view>.

³⁶ The construction impact results remain unchanged regardless of whether the analysis period is presented as 2028–2031 or 2028–2036.

Table 1. Aggregate Effects of the Proposed BOTA Modernization on El Paso County, 2028-2031

Year	Impact	Employment	Labor Income	Output
2028	Direct	521	\$36,911,418.9	\$99,437,525.5
	Indirect	134	\$9,174,093.8	\$35,850,508.2
	Induced	169	\$7,640,544.2	\$28,044,816.0
	Total	824	\$53,726,056.0	\$163,332,849.7
2029	Direct	501	\$35,500,270.5	\$95,635,961.9
	Indirect	129	\$8,823,362.1	\$34,479,919.1
	Induced	162	\$7,348,441.0	\$26,972,643.8
	Total	793	\$51,672,073.6	\$157,088,524.8
2030	Direct	482	\$34,143,071.3	\$91,979,734.7
	Indirect	124	\$8,485,039.0	\$33,161,728.6
	Induced	156	\$7,067,505.2	\$25,941,461.4
	Total	762	\$49,696,615.4	\$151,082,924.7
2031	Direct	464	\$32,837,758.7	\$88,463,287.5
	Indirect	120	\$8,161,612.0	\$31,893,933.4
	Induced	150	\$6,797,309.7	\$24,949,701.9
	Total	733	\$47,796,680.3	\$145,306,922.7

Note: IMPLAN run with 2024 data year. Labor income and output values are expressed in 2026 dollars.

Source: IMPLAN and the Hunt Institute.

Results

Table 1 presents the estimated economic impacts of additional construction and maintenance spending in El Paso County, Texas. The results were derived using IMPLAN with \$26.9 million allocated to maintenance and \$80.6 million to new construction each year from 2028 to 2031. Throughout the studied period, construction spending is estimated to support about 3,112 job-years, \$202.9 million in labor income, and generate \$616.8 million in additional output.

The assumption of a fixed nominal construction expenditure over the four-year construction period would result in a modest decline in the estimated economic impacts over time.

**CONSTRUCTION INVESTMENT
WILL HAVE AN OVERALL POSITIVE
IMPACT**

Table 2. Tax Implications of the Proposed BOTA Modernization, 2028-2031

Year	Impact	El Paso County	Texas	Federal	Total
2028	Direct	\$62,618.7	\$278,633.3	\$7,426,440.3	\$7,945,583.5
	Indirect	\$218,803.4	\$897,657.5	\$2,171,745.0	\$3,946,408.8
	Induced	\$201,845.7	\$828,205.2	\$1,919,471.5	\$3,556,947.7
	Total	\$483,267.8	\$2,004,496.0	\$11,517,656.8	\$15,448,940.0
2029	Direct	\$60,224.7	\$267,980.9	\$7,142,522.5	\$7,641,818.5
	Indirect	\$210,438.4	\$863,339.5	\$2,088,717.7	\$3,795,535.0
	Induced	\$194,129.0	\$796,542.4	\$1,846,088.8	\$3,420,963.2
	Total	\$464,792.1	\$1,927,862.8	\$11,077,329.1	\$14,858,316.6
2030	Direct	\$57,922.3	\$257,735.8	\$6,869,459.1	\$7,349,666.6
	Indirect	\$202,393.2	\$830,333.4	\$2,008,864.6	\$3,650,429.1
	Induced	\$186,707.3	\$766,090.0	\$1,775,511.6	\$3,290,177.5
	Total	\$447,022.8	\$1,854,159.3	\$10,653,835.3	\$14,290,273.2
2031	Direct	\$55,707.9	\$247,882.4	\$6,606,835.0	\$7,068,683.9
	Indirect	\$194,655.6	\$798,589.2	\$1,932,064.4	\$3,510,870.7
	Induced	\$179,569.4	\$736,801.9	\$1,707,632.6	\$3,164,391.8
	Total	\$429,932.8	\$1,783,273.5	\$10,246,532.0	\$13,743,946.4

Note: IMPLAN run with 2024 data year. Tax impact values are expressed in 2026 dollars.
Source: IMPLAN and the Hunt Institute.

Table 2 summarizes the estimated tax revenues generated during the construction phase of the BOTA modernization project. Again, assuming a fixed nominal construction expenditure over the four-year construction period would cause the estimated annual tax revenue gains to decrease slightly over time. During the 2028 to 2031 period, El Paso County is estimated to gain \$1.8 million, \$7.6 million, and \$43.5 million for the county, state, and federal levels, respectively.

Table 3. Top 10 Most Impacted Industries, 2028-2031

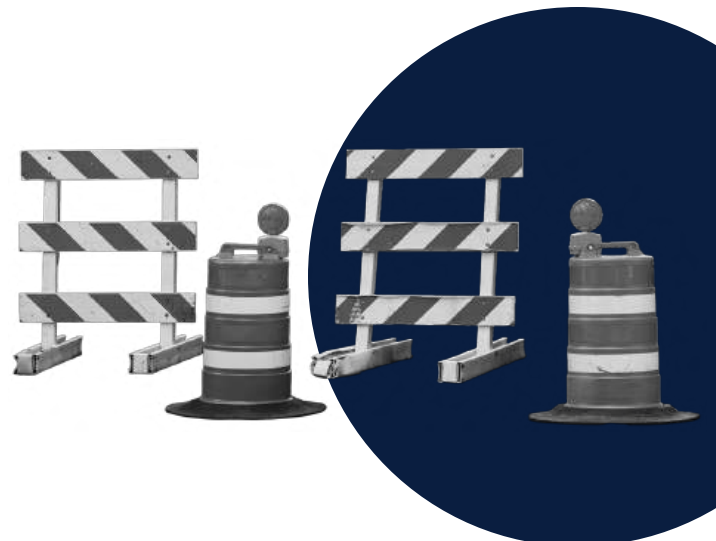
Top	Industries Impacted
1	Construction of New Highways & Streets
2	Maintenance & Repair Construction of Highways, Streets, Bridges & Tunnels
3	Petroleum Refineries
4	Owner-Occupied Housing
5	Commercial & Industrial Machinery & Equipment Rental & Leasing
6	Ready-Mix Concrete Manufacturing
7	Asphalt Shingle & Coating Materials Manufacturing
8	Wholesale-Other Durable Goods Merchant Wholesalers
9	Truck Transportation
10	Retail-Building Material & Garden Equipment & Supplies Stores

Source: IMPLAN and the Hunt Institute.

Table 3 presents the most impacted industries by the construction phase of the BOTA modernization project in El Paso County, Texas, from 2028 to 2031. The industries experiencing the greatest impacts are directly tied to the construction sector: construction of new highways and streets, and the maintenance and repair construction of highways, streets, bridges, and tunnels.

Owner-occupied housing, as well as commercial and industrial machinery and equipment rental and leasing, are also among the industries most impacted by the construction activities during this period.

Several manufacturing industries, including ready-mix concrete manufacturing, asphalt shingle and coating materials manufacturing, as well as wholesale and retail industries (other durable goods merchant wholesalers, and building material and garden equipment and supplies stores), are also among the most impacted during this period.



ii. Commercial Crossings

Producing an economic impact study of the proposed closure of commercial crossings at BOTA required an estimate of the forgone truck commercial activity that would follow from such a change. To estimate this forgone activity, two scenarios were analyzed:

SCENARIO 0: BOTA continues to operate commercial traffic.

SCENARIO 1: BOTA ceases commercial traffic.

Analysis Assumptions

The Hunt Institute estimated the possible forgone value of truck trade in El Paso County for the 2028-2036 period to assess the economic impact of BOTA's modernization. Limitations of this analysis include a lack of official capacity numbers from PoE and reliance on projections for future commercial crossings, value per truck, and trade.

To estimate the commercial crossings model in this report, the Hunt Institute assumed optimal daily PoE conditions and 250 business days per year. The annual commercial processing capacity by PoE was assumed to be the average of the maximum daily commercial crossing volumes at each PoE during periods when all regional PoEs were operating under normal conditions (2018-2025), excluding days with operational or temporary disruptions from the analysis. The capacity of weekday operations for the Ysleta PoE was assumed to differ from that of its Saturday operations, given the difference in schedule. In this report, surpassing capacity is assumed to result in commercial traffic that could not be accommodated within a PoE.

The estimates further assume that no additional commercial lanes are constructed or brought into operation during the 2028-2036 study period, given that the planning, approval, and construction of new land ports of entry, such as San Ysidro, takes approximately 10 years. This report also relies on an estimate of regional leakage under the scenario of BOTA's cessation of commercial traffic, as no such estimate exists from other entities. Estimates indicate a possible regional traffic leakage of 10.9%, based on traffic redistribution from BOTA to other PoEs in the Paso del Norte region, following the closure of BOTA's commercial operations on May 21, 2024. This percentage was also supported by survey results from firms, with approximately 12% indicating a likelihood of relocating operations outside the Paso del Norte region given BOTA's modernization. The closure of commercial operations at BOTA on May 21, 2024, also served as a basis for estimating the redistribution of traffic from BOTA's commercial traffic to the other regional PoEs, since they remained open and fully operational. Redistribution shares of commercial crossings after BOTA's cessation of commercial traffic were the following: Ysleta with 64.3%, Santa Teresa with 34.4%, and Tornillo with 1.3%.

The Santa Teresa PoE, located in New Mexico, was included in the redistribution analysis under Scenario 1 because, although outside El Paso County, it is part of the Paso del Norte regional commercial crossing network and represents a viable alternative for regional commercial truck traffic. However, because the economic impact analysis focuses on El Paso County, Texas, commercial activity projected to be redistributed to the Santa Teresa PoE was excluded from the final forgone value estimates.

Other limitations in estimating the forgone truck trade value include the lack of historical data on southbound commercial crossings at the regional PoEs, as only the Ysleta PoE had such data. A comparison of historical southbound and northbound commercial crossings at the Ysleta PoE showed similar growth patterns and crossing volumes. Due to data limitations and similar crossing patterns, regional northbound and southbound truck crossings were assumed to be equivalent and to follow the same growth rate. This assumption implies that the estimated share of forgone truck imports is also applicable to truck exports.

Methodology

The Hunt Institute used data on northbound truck crossings at the Paso del Norte region's commercial PoEs (BOTA, Tornillo, and Ysleta in Texas, and Santa Teresa in New Mexico). Data on the value of truck imports for each of these PoEs were obtained from the Bureau of Transportation Statistics from 1996 to 2025, whenever such data were available. Trade activity in Ysleta and BOTA PoEs was reported together until March 1, 2020, while the Tornillo PoE restarted commercial traffic operations on August 7, 2023.

The methodology involved the following steps:

1. Forecasting northbound commercial truck crossings and import values by PoE in the Paso del Norte region.
2. Estimating annual commercial processing capacity of the region's PoEs.
3. Estimating traffic redistribution and the regional leakage following the closure of BOTA.
4. Calculating the resulting forgone commercial trade value.

Forecasts for the 2028-2036 period were generated using exponential smoothing models for both commercial truck crossings and truck import values. The annual average import value per truck was then calculated by dividing the projected value of truck imports by the projected number of northbound truck crossings by PoE.

For both Scenario 0 and Scenario 1, annual northbound commercial processing capacity was estimated for each PoE to account for operational constraints within the regional commercial crossing network. Capacity estimates were based on historical daily commercial crossing data from 2018 through 2025 and were derived by averaging the annual maximum daily commercial crossing volumes at each PoE during periods when all regional PoEs were operating under normal conditions. To ensure that the estimates reflected normal operating conditions, days on which any commercial PoE in the region experienced operational disruptions or temporary closures were excluded from the analysis, as disruptions at one PoE were found to influence commercial traffic volumes at the remaining ports, preventing the observed crossings from representing normal operating capacity. The estimates further assume that no additional commercial lanes are constructed or brought into operation during the 2028-2036 study period.

After excluding these observations, the highest daily commercial crossing volume recorded under normal operating conditions was identified for each PoE in each year. The annual peak daily volumes were then averaged across the eight-year period using all available years to estimate the average peak daily commercial capacity for each PoE.

The annual commercial capacity was estimated by multiplying the average peak daily capacity by 250 working days, representing the average number of business days in a year.

Because the Ysleta PoE also processes commercial traffic on Saturdays, an analogous methodology was applied to estimate its Saturday processing capacity. This estimate was combined with the weekday capacity estimate to obtain Ysleta's total annual commercial capacity. The resulting estimated annual commercial capacities are 244,000 crossings at BOTA, 732,000 at Ysleta, 262,000 at Santa Teresa, and 138,000 at Tornillo.

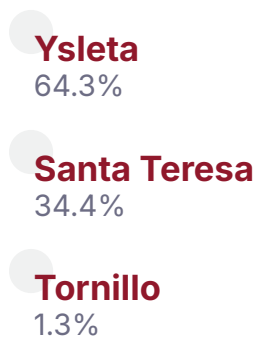
The combined annual commercial processing capacity of the remaining PoEs under Scenarios 0 and 1 was compared with projected regional commercial demand to identify the years in which the regional capacity constraint becomes binding. Under Scenario 0, the regional capacity constraints become binding in 2034, suggesting that capacity concerns exist for the region even if BOTA remains operational. However, under Scenario 1, the regional capacity constraint becomes binding earlier, in 2031, as the remaining PoEs within the Paso del Norte region are unable to accommodate the commercial traffic that is redirected from BOTA. As described further below, this tightening of regional commercial processing capacity amplifies the adverse effect of the BOTA modernization, which is primarily driven by the estimated firm leakage from the region.

For Scenario 1, commercial traffic redistribution from BOTA to other PoEs in the Paso del Norte region was estimated using historical BOTA closure events. A BOTA closure that occurred in 2023, which lasted 15 days, was initially considered; however, it proved unsuitable for the analysis as commercial crossing volume at the Ysleta PoE also declined significantly during the same period, suggesting that its capacity may have been reduced simultaneously. The May 21, 2024, BOTA closure was selected for estimating the traffic leakage rate, as other PoEs in the region remained open and fully operational.³⁷

³⁷ The Tornillo PoE was not operating commercial cargo services on May 23, 2023; therefore, no observed traffic was available for the baseline comparison. To account for this, a baseline estimate for Tornillo was developed using the average annual growth rate over the 2022-2024 period and incorporated into the regional analysis.

Commercial crossings observed on the corresponding Tuesday of the previous year (May 23, 2023) were used as the baseline and projected forward using the average YoY growth rate for the Paso del Norte region PoEs observed between May 2022 and May 2024 (1.8%). The projected regional total was then compared with the actual number of commercial crossings recorded during the May 21, 2024, BOTA closure. The comparison yielded a difference representing 10.9% of the projected regional total. This difference was interpreted as estimated traffic leakage, representing commercial vehicles that were unable to cross any PoE in the Paso del Norte region due to the operational disruption. The estimation of the regional traffic leakage in this report was further supported by survey results (see the 'Survey Findings' section of this report for additional information), given that approximately 12% of firms reported considering relocating their operations outside the Paso del Norte region, given BOTA's modernization.

Accounting for the leakage, the resulting redistribution shares of commercial crossings once BOTA ceased operations were the following:



Annual forgone truck import values were estimated for both scenarios over the 2028–2036 period using the estimated average import value per truck, redistribution shares, and traffic leakage under Scenario 1. The annual forgone truck import value was calculated as the difference between the projected truck import values under Scenarios 0 and 1. This estimate captures two components: (1) the reduction in commercial activity resulting from traffic leakage following the modernization of BOTA and (2) the additional commercial value lost once regional commercial processing capacity is reached. The estimated forgone values were adjusted using the projected Import Price Index for All Commodities to account for inflation and expressed in constant 2025 dollars.

To assess forgone truck export value in the Paso del Norte region, a similar application of the aforementioned methodology was attempted using regional southbound truck crossings. However, historical data on southbound truck crossings at Paso del Norte PoEs were available only for Ysleta. A comparison of northbound and southbound truck crossings at Ysleta showed not only similar YoY growth patterns in both directions, but also comparable crossing volumes. Therefore, regional northbound and southbound truck crossings were assumed to be equivalent and to follow the same growth rate.³⁸ This assumption implies that the estimated share of forgone truck imports is also applicable to exports. Accordingly, this share was applied to estimate the total forgone truck trade value for El Paso County, which is equivalent to that estimated for Texas.

The Santa Teresa PoE, in New Mexico, was included in the redistribution analysis under Scenario 1 because, despite being located outside El Paso County, it is part of the Paso del Norte regional commercial crossing network and represents a viable alternative for regional commercial truck traffic. However, because the economic impact analysis focuses on El Paso County, Texas, commercial activity projected to be redistributed to the Santa Teresa PoE was excluded from the final forgone value estimates. Over the 2028–2036 period, the cessation of commercial crossings at BOTA is estimated to result in a net loss of \$54.8 billion in truck trade value at the Santa Teresa PoE. This net loss reflects the offsetting effects of an estimated \$74.6 billion loss associated with regional traffic leakage and a \$19.8 billion gain associated with the redistribution of commercial traffic from BOTA to the Santa Teresa PoE. The latter can be interpreted as \$19.8 billion in truck trade value shifting from El Paso County, Texas, to Doña Ana County, New Mexico, over the 2028–2036 period.

³⁸ This assumption is also consistent with the approach used by other organizations analyzing northbound and southbound crossings in the region, including the MPO.

Table 4. Total Forgone Value of Truck Trade in El Paso County & Texas

Year	Forgone Land Trade Value	El Paso County Trade Share	Texas Trade Share
2028	\$15,166,817,993.9	11.9%	4.8%
2029	\$16,114,707,784.1	12.6%	5.1%
2030	\$17,043,384,110.2	13.3%	5.3%
2031	\$18,466,926,567.4	14.5%	5.8%
2032	\$25,856,984,290.1	20.2%	8.1%
2033	\$32,253,174,837.8	25.3%	10.1%
2034	\$34,839,517,598.1	27.3%	10.9%
2035	\$34,910,765,263.0	27.3%	11.0%
2036	\$36,570,231,266.2	28.6%	11.5%

Note: Forgone land trade values are presented in constant 2025 U.S. dollars. Trade shares are based on 2025 trade values.

Source: The Hunt Institute, the Bureau of Transportation Statistics, and IMPLAN.

FORGONE TRUCK TRADE RESULTS IN A REGIONAL NET LOSS

Table 4 presents the estimated forgone truck trade values for the region following the cessation of commercial crossings at BOTA over the 2028-2036 period, expressed in 2025 dollars. These numbers reflect losses associated with fewer northbound and southbound truck crossings following the policy change. The percentages indicate the forgone truck trade value as a share of total truck trade for El Paso County and Texas, respectively, in each year.

In 2028, the forgone value of the truck trade is estimated at \$15.2 billion. This loss is projected to increase throughout the forecast period, reaching \$36.6 billion by 2036, equivalent to 28.6% of total truck trade through El Paso County and 11.5% of total truck trade through Texas ports of entry.

IMPLAN Analysis

The Hunt Institute used the estimated forgone truck trade shares derived in the previous section to estimate the economic impact of reduced commercial crossings over the 2028-2036 period. A 25% pass-through assumption was applied to the estimated forgone truck trade shares to derive a plausible shock to IMPLAN industries that are highly connected to trade. Under this assumption, a 10% reduction in trade is assumed to reduce output in these industries by 2.5%. These industries include truck transportation, warehousing and storage, and a selection of trade-intensive manufacturing industries. The resulting values formed the basis for estimating the economic impacts associated with reduced commercial crossing.

Table 5 presents the full list of industries considered in the IMPLAN analysis. IMPLAN scenarios were then generated for each year using the estimated percentage decline in output as the direct impact.

Table 5. IMPLAN Industries Considered for Economic Impact Analysis

IMPLAN CODE	IMPLAN Description
399	Truck Transportation
404	Warehousing & Storage
178	Plastics Packaging Materials & Unlaminated Film & Sheet Manufacturing
179	Unlaminated Plastics Profile Shape Manufacturing
182	Polystyrene Foam Product Manufacturing
183	Urethane & Other Foam Product (Except Polystyrene) Manufacturing
185	Other Plastics Product Manufacturing
187	Rubber & Plastics Hoses & Belting Manufacturing
252	Farm Machinery & Equipment Manufacturing
253	Lawn & Garden Equipment Manufacturing
260	All Other Industrial Machinery Manufacturing
261	Commercial & Service Industry Machinery Manufacturing
263	Heating Equipment (Except Warm Air Furnaces) Manufacturing
265	Industrial Mold Manufacturing
266	Special Tool, Die, Jig, & Fixture Manufacturing
268	Machine Tool Manufacturing
286	Scales, Balances, & Miscellaneous General Purpose Machinery Manufacturing
287	Electronic Computer Manufacturing
296	Semiconductor & Related Device Manufacturing
297	Capacitor, Resistor, Coil, Transformer, & Other Inductor Manufacturing
301	Search, Detection, & Navigation Instruments Manufacturing
308	Watch, Clock, & Other Measuring & Controlling Device Manufacturing
311	Lighting Fixture Manufacturing
314	Power, Distribution & Specialty Transformer Manufacturing
315	Motor & Generator Manufacturing
316	Switchgear & Switchboard Apparatus Manufacturing
319	Fiber Optic Cable Manufacturing
320	Other Communication & Energy Wire Manufacturing
321	Wiring Device Manufacturing
323	All Other Miscellaneous Electrical Equipment & Component Manufacturing
324	Automobile & Light Duty Motor Vehicle Manufacturing
330	Motor Vehicle Gasoline Engine & Engine Parts Manufacturing
331	Motor Vehicle Electrical & Electronic Equipment Manufacturing
332	Motor Vehicle Transmission & Power Train Parts Manufacturing
333	Motor Vehicle Seating & Interior Trim Manufacturing
335	Other Motor Vehicle Parts Manufacturing
337	Aircraft Manufacturing
338	Aircraft Engine & Engine Parts Manufacturing
348	Wood Kitchen Cabinet & Countertop Manufacturing
352	Institutional Furniture Manufacturing

Source: The Hunt Institute.

Results

Table 6 reports the economic impact of closing the commercial lanes at BOTA on El Paso County. The first column of Table 6 reports employment losses following the closure. During the 2028-2036 period, the estimated economic losses associated with BOTA's modernization are 16,655 job-years, \$931.8 million in labor income, and \$3.5 billion in total output in El Paso County. These economic losses are estimated to increase over time throughout the studied period (all figures are reported in 2026 dollars).

The output losses described in Table 6 reflect reduced economic activity; as such, there would be associated reductions in tax revenue. This is true at the county, state, and federal levels.

EMPLOYMENT LOSSES EXPECTED TO GROW OVER TIME



Table 6. Aggregate Effects of the Cessation of Commercial Traffic at BOTA on El Paso County, 2028-2036

Year	Impact	Employment	Labor Income	Output
2028	Direct	(618)	(\$38,475,620.4)	(\$151,909,173.2)
	Indirect	(393)	(\$20,381,477.6)	(\$66,771,087.9)
	Induced	(216)	(\$9,809,555.4)	(\$36,010,884.0)
	Total	(1,228)	(\$68,666,653.3)	(\$254,691,145.1)
2029	Direct	(640)	(\$39,860,113.9)	(\$157,620,324.7)
	Indirect	(408)	(\$21,138,800.9)	(\$69,271,086.3)
	Induced	(224)	(\$10,166,783.4)	(\$37,322,268.0)
	Total	(1,272)	(\$71,165,698.2)	(\$264,213,678.9)
2030	Direct	(660)	(\$41,105,508.6)	(\$162,800,143.3)
	Indirect	(421)	(\$21,824,021.2)	(\$71,536,407.5)
	Induced	(231)	(\$10,488,828.5)	(\$38,504,495.5)
	Total	(1,313)	(\$73,418,358.4)	(\$272,841,046.2)
2031	Direct	(698)	(\$43,434,421.5)	(\$172,296,187.7)
	Indirect	(445)	(\$23,086,755.4)	(\$75,696,849.1)
	Induced	(244)	(\$11,087,752.2)	(\$40,703,144.2)
	Total	(1,387)	(\$77,608,929.1)	(\$288,696,181.0)
2032	Direct	(954)	(\$59,374,426.6)	(\$235,903,159.8)
	Indirect	(610)	(\$31,595,380.8)	(\$103,624,608.1)
	Induced	(334)	(\$15,163,239.8)	(\$55,664,260.8)
	Total	(1,897)	(\$106,133,047.2)	(\$395,192,028.7)
2033	Direct	(1,160)	(\$72,258,826.3)	(\$287,556,907.1)
	Indirect	(743)	(\$38,495,643.6)	(\$126,292,385.5)
	Induced	(407)	(\$18,461,508.4)	(\$67,772,206.2)
	Total	(2,310)	(\$129,215,978.3)	(\$481,621,498.9)
2034	Direct	(1,223)	(\$76,150,845.6)	(\$303,493,096.5)
	Indirect	(783)	(\$40,605,308.6)	(\$133,255,133.8)
	Induced	(429)	(\$19,462,337.2)	(\$71,446,249.8)
	Total	(2,435)	(\$136,218,491.4)	(\$508,194,480.1)
2035	Direct	(1,195)	(\$74,431,225.0)	(\$297,082,061.0)
	Indirect	(766)	(\$39,723,972.6)	(\$130,404,054.1)
	Induced	(419)	(\$19,029,188.2)	(\$69,856,159.9)
	Total	(2,380)	(\$133,184,385.8)	(\$497,342,275.1)
2036	Direct	(1,221)	(\$76,064,799.3)	(\$304,059,225.9)
	Indirect	(783)	(\$40,632,419.8)	(\$133,428,970.8)
	Induced	(429)	(\$19,453,354.6)	(\$71,413,275.6)
	Total	(2,433)	(\$136,150,573.7)	(\$508,901,472.2)

Note: IMPLAN run with 2024 data year and results are reported with dollar year 2026. Values shown in parentheses present negative economic impacts.
Source: IMPLAN and the Hunt Institute.

Table 7. Tax Implications of Cessation of Commercial Traffic at BOTA, 2028-2036

Year	Impact	El Paso County	Texas	Federal	Total
2028	Direct	(\$144,863.8)	(\$625,552.6)	(\$8,740,434.3)	(\$9,936,428.6)
	Indirect	(\$311,294.2)	(\$1,284,457.9)	(\$4,688,020.2)	(\$7,217,910.3)
	Induced	(\$259,618.2)	(\$1,065,237.7)	(\$2,464,565.9)	(\$4,570,710.6)
	Total	(\$715,776.2)	(\$2,975,248.2)	(\$15,893,020.3)	(\$21,725,049.5)
2029	Direct	(\$150,195.4)	(\$648,546.9)	(\$9,056,713.9)	(\$10,296,706.9)
	Indirect	(\$322,931.5)	(\$1,332,471.9)	(\$4,862,541.7)	(\$7,487,006.0)
	Induced	(\$269,072.5)	(\$1,104,029.5)	(\$2,554,316.3)	(\$4,737,158.7)
	Total	(\$742,199.4)	(\$3,085,048.4)	(\$16,473,571.9)	(\$22,520,871.6)
2030	Direct	(\$155,010.8)	(\$669,310.1)	(\$9,341,520.3)	(\$10,621,248.4)
	Indirect	(\$333,472.8)	(\$1,375,963.3)	(\$5,020,504.3)	(\$7,730,635.5)
	Induced	(\$277,595.7)	(\$1,139,000.8)	(\$2,635,227.3)	(\$4,887,213.6)
	Total	(\$766,079.3)	(\$3,184,274.3)	(\$16,997,251.9)	(\$23,239,097.5)
2031	Direct	(\$163,922.9)	(\$707,759.5)	(\$9,872,739.9)	(\$11,226,022.7)
	Indirect	(\$352,845.9)	(\$1,455,895.7)	(\$5,311,356.4)	(\$8,178,929.8)
	Induced	(\$293,446.6)	(\$1,204,038.8)	(\$2,785,701.7)	(\$5,166,278.5)
	Total	(\$810,215.4)	(\$3,367,694.1)	(\$17,969,797.9)	(\$24,571,231.0)
2032	Direct	(\$224,258.2)	(\$968,222.8)	(\$13,498,636.6)	(\$15,349,995.3)
	Indirect	(\$482,995.7)	(\$1,992,907.4)	(\$7,269,365.4)	(\$11,194,660.1)
	Induced	(\$401,307.8)	(\$1,646,603.1)	(\$3,809,632.7)	(\$7,065,229.5)
	Total	(\$1,108,561.6)	(\$4,607,733.3)	(\$24,577,634.6)	(\$33,609,884.9)
2033	Direct	(\$273,138.5)	(\$1,179,209.0)	(\$16,431,186.1)	(\$18,686,040.4)
	Indirect	(\$588,612.6)	(\$2,428,690.6)	(\$8,857,583.4)	(\$13,641,220.3)
	Induced	(\$488,599.1)	(\$2,004,767.7)	(\$4,638,294.1)	(\$8,602,039.4)
	Total	(\$1,350,350.2)	(\$5,612,667.4)	(\$29,927,063.6)	(\$40,929,300.1)
2034	Direct	(\$288,013.5)	(\$1,243,392.0)	(\$17,319,267.2)	(\$19,696,896.6)
	Indirect	(\$621,004.8)	(\$2,562,338.2)	(\$9,343,688.6)	(\$14,390,571.8)
	Induced	(\$515,086.9)	(\$2,113,449.6)	(\$4,889,743.6)	(\$9,068,370.5)
	Total	(\$1,424,105.2)	(\$5,919,179.7)	(\$31,552,699.5)	(\$43,155,838.8)
2035	Direct	(\$281,669.5)	(\$1,215,968.8)	(\$16,931,189.5)	(\$19,256,424.9)
	Indirect	(\$607,659.1)	(\$2,507,265.1)	(\$9,141,563.3)	(\$14,079,981.6)
	Induced	(\$503,623.3)	(\$2,066,413.4)	(\$4,780,918.7)	(\$8,866,547.5)
	Total	(\$1,392,951.9)	(\$5,789,647.3)	(\$30,853,671.5)	(\$42,202,953.9)
2036	Direct	(\$288,015.3)	(\$1,243,327.1)	(\$17,305,904.6)	(\$19,683,501.8)
	Indirect	(\$621,693.2)	(\$2,565,164.3)	(\$9,351,324.4)	(\$14,403,792.9)
	Induced	(\$514,849.3)	(\$2,112,474.6)	(\$4,887,486.9)	(\$9,064,185.9)
	Total	(\$1,424,557.8)	(\$5,920,966.0)	(\$31,544,715.9)	(\$43,151,480.7)

Note: IMPLAN run with 2024 data year and results are reported with dollar year 2026. Values shown in parentheses present negative economic impacts.
Source: IMPLAN and the Hunt Institute.

Table 7 provides a summary of the estimated tax implications of BOTA cessation of commercial traffic. Between 2028 and 2036, El Paso County is estimated to lose \$9.7 million in tax revenue at the county level, \$40.5 million at the state level, and \$215.8 million at the federal level. These tax revenue losses are anticipated to increase over the studied period.

Table 8. Top 10 Most Impacted Industries, 2026-2036

Tax	Industries Impacted
1	Truck Transportation
2	Warehousing & Storage
3	Motor Vehicle Transmission & Power Train Parts Manufacturing
4	Motor Vehicle Electrical & Electronic Equipment Manufacturing
5	Other Plastics Product Manufacturing
6	Petroleum Refineries
7	Owner-Occupied Housing
8	Scenic & Sightseeing Transportation & Support Activities For Transportation
9	Other Real Estate
10	Plastics Packaging Materials & Unlaminated Film & Sheet Manufacturing

Source: IMPLAN and the Hunt Institute.

Table 8 presents the top 10 most impacted industries with the cessation of commercial traffic through BOTA in El Paso County, Texas, for the 2028-2036 period. The most affected industries' activities are directly tied to cross-border trade: truck transportation, as well as warehousing and storage.

Several manufacturing industries are also among the most affected in the analysis: motor vehicle transmission and powertrain parts manufacturing, motor vehicle electrical and electronic equipment manufacturing, other plastics product manufacturing, and plastics packaging materials and unlaminated film and sheet manufacturing.

EL PASO COUNTY, TEXAS & FEDERAL TAX REVENUES TO DECLINE



iii. Noncommercial Crossings

Methodology

Northbound noncommercial crossers stimulate economic activity in the region through their local spending. Estimating these gains requires projections of the additional noncommercial crossings under Scenarios 0 and 1. Although the Hunt Institute was able to develop these projections under Scenario 0, the available data were insufficient to independently project the additional crossings associated under Scenario 1. Therefore, the Institute relied on the GSA estimates of the economic gains associated with additional noncommercial crossings following the modernization of BOTA.³⁹

The Environmental Impact Statement from GSA evaluates the economic effects of traveler crossings (by personally owned vehicle (POV) and by truck) by estimating how spending by travelers entering El Paso contributes to the regional economy.⁴⁰ The analysis uses the IMPLAN economic input-output model (I-O model) to estimate economic activity generated by border-crossing visitors.

The economic effects of increased noncommercial crossings resulting from the BOTA modernization and the cessation of commercial traffic are calculated as the difference in projected traveler spending under Scenarios 0 and 1.

Overall, GSA's analysis suggests that the anticipated increase in noncommercial crossings resulting from BOTA modernization would support 4,014 additional job-years, \$128.1 million in additional labor income, and \$514.4 million in additional output over the 2028-2036 review period.⁴¹

iv. Net Impact in El Paso County, Texas

The previous three sections provided estimates of the economic impact associated with the cessation of commercial crossings and the expansion of noncommercial crossings at BOTA. The analysis shown in Table 9 provides an assessment of both the anticipated benefits and costs associated with the project. Construction expenditures for the noncommercial enhancements and the anticipated additional spending of new noncommercial crossers account for the benefits of the project, while forgone truck trade and its economic impact account for the losses.

Taken together, the estimates presented above suggest that the costs outweigh the benefits. In terms of employment, the construction phase is estimated to support an additional 3,112 job-years over the entire four-year construction period from 2028 to 2031, or 778 jobs per year on average. Similarly, spending by additional noncommercial crossers is estimated to support an additional 446 jobs per year once additional commercial crossings begin. In contrast, forgone truck trade due to reduced commercial crossings is estimated to cost the region 16,655 job-years over the entire review period from 2028 to 2036, suggesting job losses on the order of 1,851 per year on average.

Considering a few years in isolation can make the net impact clearer. For example, in 2028, it is estimated that 824 job-years would be created due to additional construction expenditures, and 446 job-years would be supported by the spending of additional noncommercial crossers. However, 1,228 job-years are estimated to be lost because of reduced commercial crossings. This implies a net gain of 42 jobs in 2028. However, this is the most favorable year for the project as employment gains associated with the construction phase are estimated to decline steadily before phasing out completely, while employment losses from the decline in commercial crossings increase over the relevant period. By 2036, there are no anticipated employment gains from construction; the employment gains from additional noncommercial crossings remain at 446 job-years, and the employment losses due to reduced commercial crossings reach 2,433 job-years, implying a net loss of 1,987 job-years.

39 Available data from the Metropolitan Planning Organization (MPO) reflected equivalent estimates of additional crossings under Scenarios 0 and 1. Applying these estimates would yield no incremental economic gains under Scenario 1 relative to Scenario 0. Accordingly, to account for the potential economic gains associated with additional noncommercial crossings following modernization, the Institute applied the framework and results developed by the GSA.

40 U.S. General Services Administration, *Bridge of the Americas Land Port of Entry Final Environmental Impact Statement*, June 20126, <https://www.gsa.gov/system/files/BOTA%20Final%20EIS.pdf>.

41 These estimates are presented for the 2028-2036 period. The GSA annual average estimates associated with additional noncommercial crossings (446 jobs, \$14.2 million in labor income, and \$57.2 million in output) are assumed to continue in perpetuity beyond 2036. For simplicity, nominal values were not adjusted for inflation.

Table 9. Net Economic Impact of the BOTA Modernization Project on El Paso County Texas

Year	Employment	Labor Income	Output
2028	42	(\$702,064.4)	(\$34,201,203.4)
2029	(34)	(\$5,255,092.6)	(\$49,968,062.1)
2030	(104)	(\$9,483,211.0)	(\$64,601,029.6)
2031	(208)	(\$15,573,716.8)	(\$86,232,166.3)
2032	(1,451)	(\$91,894,515.2)	(\$338,034,936.7)
2033	(1,864)	(\$114,977,446.3)	(\$424,464,406.9)
2034	(1,989)	(\$121,979,959.4)	(\$451,037,388.1)
2035	(1,934)	(\$118,945,853.8)	(\$440,185,183.1)
2036	(1,987)	(\$121,912,041.7)	(\$451,744,380.2)
TOTAL	(9,529)	(\$600,723,901.1)	(\$2,340,468,756.4)

Note: Employment is measured in job-years, where one job-year represents a job supported for one year. Employment figures are not reported in cumulative net impact, unlike labor income and output, given that these represent the average number of jobs sustained annually and cannot be added across multiple years without double-counting positions maintained over time. Labor income and output values are expressed in 2026 dollars. Values shown in parentheses present negative economic impacts.

Source: The Hunt Institute, the U.S. General Services Administration, and IMPLAN.

ECONOMIC BENEFITS ARE TEMPORARY, WHILE LOSSES ARE PERMANENT

A similar pattern is observed in terms of output, with the benefits associated with the construction phase and expansion of noncommercial crossings mitigating the losses due to declines in commercial crossings early on. In 2028, the construction phase is estimated to boost regional output by about \$163.3 million and the spending by additional noncommercial crossers is estimated to add another \$57.2 million. However, the reduction in commercial crossings and associated trade are estimated to lower regional output by about \$254.7 million in 2028. As such, the net impact on output for 2028 is estimated at a loss of approximately \$34.2 million. These net losses accumulate, and by 2036, the net output loss for the region is estimated at approximately \$451.7 million.

The estimated economic impacts indicate that the benefits to El Paso from BOTA infrastructure modernization are temporary, whereas the gains associated with additional noncommercial crossings and the losses resulting from forgone truck trade are permanent. Accounting for the economic impacts of BOTA infrastructure modernization, the increase in noncommercial crossings during and following construction, and the forgone truck trade associated with reduced commercial crossings, the net estimated economic impact on El Paso over the 2028-2036 period is a loss of 9,529 job-years, \$600.7 million in labor income, \$2.3 billion in output.

Table 10. Net Tax Impact of the BOTA Modernization Project

Year	El Paso County	Texas	Federal	Total
2028	(\$232,508.4)	(\$970,752.2)	(\$4,375,363.5)	(\$6,276,109.5)
2029	(\$277,407.3)	(\$1,157,185.6)	(\$5,396,242.8)	(\$7,662,554.9)
2030	(\$319,056.5)	(\$1,330,115.0)	(\$6,343,416.6)	(\$8,948,824.3)
2031	(\$380,282.6)	(\$1,584,420.5)	(\$7,723,265.9)	(\$10,827,284.5)
2032	(\$1,108,561.6)	(\$4,607,733.3)	(\$24,577,634.6)	(\$33,609,884.9)
2033	(\$1,350,350.2)	(\$5,612,667.4)	(\$29,927,063.6)	(\$40,929,300.1)
2034	(\$1,424,105.2)	(\$5,919,179.7)	(\$31,552,699.5)	(\$43,155,838.8)
2035	(\$1,392,951.9)	(\$5,789,647.3)	(\$30,853,671.5)	(\$42,202,953.9)
2036	(\$1,424,557.8)	(\$5,920,966.0)	(\$31,544,715.9)	(\$43,151,480.7)
TOTAL	(\$7,909,781.5)	(\$32,892,667.0)	(\$172,294,073.9)	(\$236,764,231.7)

Note: Tax impact values are expressed in 2026 dollars. The numbers do not include the tax revenues generated by noncommercial crossers. Values shown in parentheses present negative economic impacts.

Source: The Hunt Institute and IMPLAN.

Table 10 summarizes the net tax impacts associated with the project at the county, state, and federal levels over the 2028–2036 period. Because these estimates do not include the additional tax revenues generated by noncommercial crossers under Scenario 1, they should be interpreted as an upper bound of the overall tax losses associated with the project. Although BOTA infrastructure modernization generates additional tax revenues, these gains are insufficient to offset the tax losses associated with forgone truck trade. Overall, the project is estimated to result in net tax losses of \$7.9 million for El Paso County, \$32.9 million for the State of Texas, and \$172.3 million for the federal government over the 2028–2036 period.

v. Firms Engaged in Cross-Border Trade

Methodology

The Hunt Institute also assessed the impact of the cessation of commercial traffic through BOTA on regional firms engaged in cross-border trade by comparing logistics costs under Scenarios 0 and 1. Under Scenario 1, logistics cost estimates incorporated additional vehicle miles traveled and increased travel time resulting from longer border wait times at the remaining PoEs in the Paso del Norte region, as reported by interviewees (see the 'Firm Case Studies and Stakeholder Perspectives' section for more information).

Logistics costs for round trips by PoE (i.e., trips back and forth between El Paso County and Ciudad Juárez, or Doña Ana County and Ciudad Juárez) were obtained from interviews with five self-selected firms that either manage the logistics of other firms or manage their own. The Hunt Institute used an estimate provided by the El Paso MPO to the Texas Department of Transportation indicating that 85% of commercial traffic through the El Paso-Ciudad Juárez PoEs remains within the region.⁴² Border crossings for trucks by PoE for 2025 were obtained from the U.S. Bureau of Transportation Statistics.

Under Scenario 1, the estimated northbound commercial crossing leakage rate (10.9%) and the redistribution shares to the remaining ports of entry in the region following the modernization of BOTA were used (see the 'Northbound Commercial Crossing' methodology section for more information).



⁴² "Texas-Mexico Border Region Connectivity Plan Project Report," Texas Department of Transportation, accessed July 25th, 2026: <https://www.txdot.gov/content/dam/docs/division/tpp/brcp/border-region-connectivity-plan-report.pdf#:~:text=Similarly%2C%20for%20commercial%20vehicles%2C%20the%20Bridge%20of,the%20Americas%20which%20are%20the%20main%20regional>

Table 11. Monthly Crossing Volume & Potential Increase in Border Wait Times (Mins.)

Company	Monthly Crossing Volume	Ysleta				Santa Teresa			
		Current Wait		Increased Wait Time		Current Wait		Increased Wait Time	
Border Trucking Compliance	9,000 (Data from 700)	120-150	→	240	+77.8%	30	→	60-90	+150.0%
Tecma Transportation Services	2,600	60-300	→	420	+133.3%	30-180	→	300-360	+214.3%
Fletes Sotelo	1,880	60-180	→	180-300	+100.0%	-		-	-
Rexmed	-	60-180	→	-	-	-		-	-
Supermarket	-	180	→	300	+66.7%	-		-	-
Transportes Paso del Norte	300	120-150	→	270-300	+111.1%	-		-	-

Note: Percentage increases were calculated using the midpoint of each reported wait-time range.

Source: The Hunt Institute.

Results

Border crossing dynamics, including current crossing volume, border wait time, and logistics costs, were reported by five firms under Scenarios 0 and 1 in the Paso del Norte region (see the 'Firm Case Studies and Stakeholder Perspectives' section for more information):

Bafar USA/Longhorn Warehouses, a meat processor and specialized warehousing firm, with approximately 440 monthly truck crossings.

Border Trucking Compliance (BTC), an insurance company providing data from 700 of its clients, accounting for 9,000 monthly border crossings.

Fletes Sotelo, a trucking firm with more than 1,880 monthly commercial border crossings.

Rexmed Health, a medical device manufacturer that manages its own cross-border transportation operations.

S-Mart, a Mexican regional supermarket that manages its own cross-border transportation operations.

Tecma Transportation Services (TTS), a freight company managing 2,600 commercial crossings monthly.

Transportes Paso del Norte, a trucking firm with approximately 300 monthly truck crossings.

Table 11 summarizes the estimated current and potential increases in border wait times by the interviewed firms. According to interviewees, the current wait times in the Ysleta PoE range from 60 minutes (Fletes Sotelo, Rexmed, and TTS) to 300 minutes (TTS). Meanwhile, current wait times reported for Santa Teresa range from 30 minutes (BTC and TTS) to 180 minutes (TTS).

These firms expected longer border wait times at both the Ysleta and Santa Teresa PoEs following the cessation of commercial traffic at BOTA. For the Ysleta PoE, the expected increase in border wait times ranges from 66.7% (S-Mart) to 133.3% (TTS). For the Santa Teresa PoE, the expected increase would range from 150% (BTC) to 214.3% (TTS).

Table 12. Logistics Costs by Paso del Norte Firms

Company	Current Rate			
	BOTA	Ysleta	Santa Teresa	Tornillo
Bafar USA/ Longhorn Warehouses	\$300	\$300	X	X
Border Trucking Compliance (Insurance Company)	\$300	\$300	\$300	\$300
Fletes Sotelo	\$400	\$500	\$650	\$700
Tecma	\$350	\$350	\$350	X
Transportes Paso del Norte	\$300	X	X	X

Source: The Hunt Institute.

Table 12 presents the estimated logistics costs by round-trip reported by these five firms under Scenarios 0 and 1 for the Paso del Norte region.

All firms reported increases in estimated freight rates if BOTA commercial traffic were to cease operations (Scenario 1). The rate increases from Scenario 0 to Scenario 1 range from \$60 (BTC) to \$350 (Bafar USA/Longhorn Warehouses if using the Tornillo PoE). Because Fletes Sotelo was the only firm that provided average logistics costs by PoE under both Scenarios 0 and 1, its estimates were used in the cost-impact analysis for firms.



Table 13. Potential Additional Logistics Costs per Round-Trip by PoE

Regional Port of Entry	Total Border Crossings (2025)	Border Crossings (2025)			Logistic Costs		Annual Logistic Costs	
		Scenario 0	Scenario 1		Scenario 0	Scenario 1	Scenario 0	Scenario 1
		Local Origin Border Crossings (85.0%)	Local Origin Border Crossings with Leakage (10.9%)	BOTA Redistributed Traffic				
Santa Teresa	171,932	146,142	130,159	42,775	\$650	\$900	\$94,992,430	\$155,640,555
BOTA	164,255	139,617	124,347	-	\$400	\$0	\$55,846,700	-
Ysleta	641,729	545,470	485,812	79,955	\$500	\$600	\$272,734,825	\$339,460,002
Tornillo	36,675	31,174	27,764	1,617	\$700	\$1,000	\$21,821,625	\$29,380,786
Paso del Norte Region	1,014,591	862,402	768,081	124,347	-	-	\$445,395,580	\$524,481,342

Note: Round-trip refers to trips back and forth between Ciudad Juárez and El Paso County, or Ciudad Juárez and Doña Ana County. Scenario 0 refers to the scenario in which BOTA commercial traffic continues operating; Scenario 1 refers to the scenario in which BOTA commercial traffic ceases operating.
Source: The Hunt Institute.

Table 13 presents the estimated annual increase in logistics costs per round trip by PoE, based on 2025 border-crossing data. Using the logistics costs provided in Table 12 by the Fletes Sotelo firm, the annual logistics costs for firms in the region were estimated. Fletes Sotelo's data was chosen given the similarity to other interviewees' results and the breakdown of the data provided by this specific firm. The total annual logistics costs in the Paso del Norte region were estimated at \$445.4 million under Scenario 0 in 2025. For Scenario 1, however, logistic costs are estimated to increase to \$524.5 million, resulting in an additional \$79.1 million (17.8%) for the Paso del Norte region.

Table 14. Annual Additional Logistics Costs per Round-Trip for the Paso del Norte Region

Year	Scenario 0	Scenario 1	CPI Inflation	Annual Paso del Norte Additional Logistics Costs
2025	\$445,395,580	\$524,481,342	2.4	\$79,085,762
2026	\$456,085,074	\$537,068,895	2.3	\$80,983,821
2027	\$466,575,031	\$549,421,479	2.3	\$82,846,448
2028	\$477,306,256	\$562,058,173	2.3	\$84,751,917
2029	\$488,284,300	\$574,985,511	2.3	\$86,701,211
2030	\$499,514,839	\$588,210,178	2.3	\$88,695,339
2031	\$511,003,680	\$601,739,012	2.3	\$90,735,332
2032	\$522,756,765	\$615,579,009	2.3	\$92,822,244
2033	\$534,780,171	\$629,737,326	2.3	\$94,957,156
2034	\$547,080,115	\$644,221,285	2.3	\$97,141,170
2035	\$559,662,957	\$659,038,375	2.3	\$99,375,417
2036	\$572,535,205	\$674,196,257	2.3	\$101,661,052

Source: The Hunt Institute using data from interviewees and the Congressional U.S. Budget Office

Table 14 presents the projected annual additional logistics costs for firms in the Paso del Norte region for the 2028-2036 period, adjusted for the projected inflation. The Projected Consumer Price Index (CPI) inflation was obtained from the Congressional Budget Office's "The Budget and Economic Outlook: 2026 to 2036" (2026).⁴³

ANNUAL ADDITIONAL LOGISTICS COSTS ESTIMATED TO GROW

The total additional annual logistics costs for Scenario 1 for regional firms in 2028 are estimated to reach \$84.8 million. The regional additional logistics costs are projected to continue to increase over time and are estimated to reach approximately \$101.7 million by 2036.

43 Congressional Budget Office, "The Budget and Economic Outlook: 2026 to 2036", (2026): <https://www.cbo.gov/publication/62105>

vi. Environmental Considerations

These findings do not constitute an evaluation of the policy merits of the proposed modernization, an assessment of its environmental benefits or costs, or a recommendation regarding the selected GSA alternative. However, environmental impact results from external organizations are included alongside the primary economic analysis to provide additional context of the broader implications of the proposed modernization.

The GSA's Final Environmental Impact Statement, released in May 2025, determined that Action Alternative 4's cessation of commercial traffic operations at BOTA would have a "Moderate-Significant Beneficial Impact" on air quality in the vicinity of the BOTA PoE.⁴⁴

A more recent preliminary model in development by the El Paso MPO evaluated the impact of closing BOTA's commercial lanes using the same pollutant categories examined in the GSA's analysis, including nitrogen oxides, volatile organic compounds, carbon monoxide, and particulate matter with a diameter of 10 micrometers or less. The model uses 2025 data to establish Scenario 0, which represents daily emissions under existing conditions, and Scenario 1, which projects daily emissions under GSA Action Alternative 4. The modeled impacts were first distributed by PoEs across the Paso del Norte region, then disaggregated between the El Paso and Ciudad Juárez areas, before being aggregated into a regional total.

The MPO analysis supports the GSA finding that a moderate-to-significant reduction in emissions can be expected in the vicinity of BOTA. However, due to the redistribution of commercial traffic, the resulting increase in vehicle miles traveled (VMT) and the associated increase in idling time, a moderate-to-significant increase in emissions is expected at the Ysleta-Zaragoza PoE. The MPO analysis estimates that the cessation of commercial traffic operations at BOTA would reduce pollutant emissions in the vicinity of BOTA, increase emissions at the remaining PoEs, and produce an overall negative impact on air quality across the Paso del Norte region. Following the cessation of commercial traffic operations at BOTA, emissions of nitrogen oxides, volatile organic compounds, carbon monoxide, and particulate matter with a diameter of 10 micrometers or less across the Paso del Norte region are expected to increase by 13%, 2%, 2%, and 4%, respectively.

⁴⁴ U.S. General Services Administration, *Bridge of the Americas Land Port of Entry Final Environmental Impact Statement*, accessed June 2026, <https://www.gsa.gov/system/files/BOTA%20Final%20EIS.pdf>.

VIII. SURVEY FINDINGS

To provide a comprehensive assessment of the potential impact of the cessation of commercial traffic at BOTA on local businesses, the Hunt Institute created and distributed a series of surveys to firms and businesses throughout the Paso del Norte region. The surveys were designed to capture current operational information and perceived exposure to a BOTA commercial cessation, whether directly or indirectly tied to cross-border trade.

i. Methodology

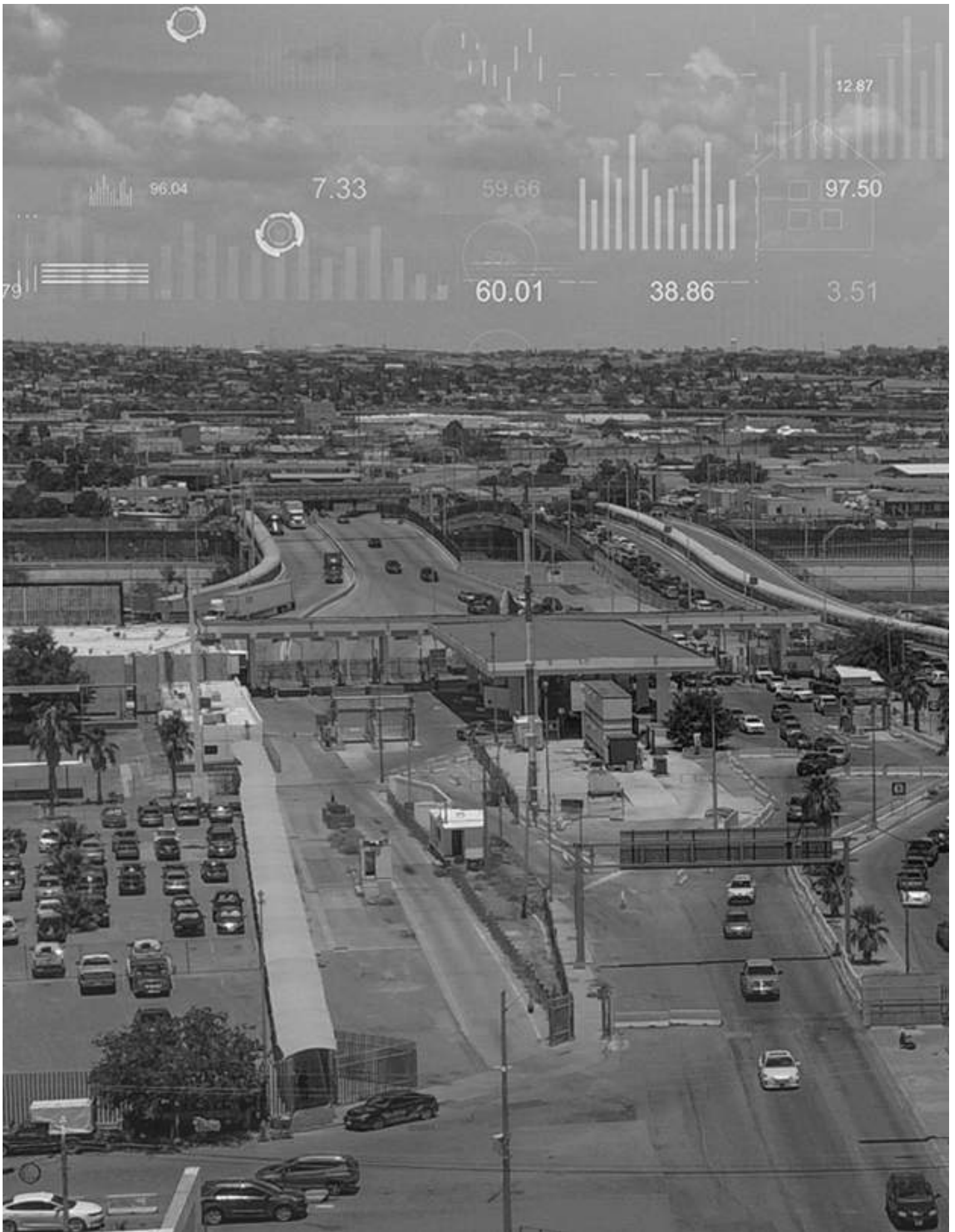
The Hunt Institute designed two separate surveys to assess the relationship between regional businesses and the four PoEs in the Paso del Norte Region (BOTA, Tornillo, Ysleta-Zaragoza in Texas, and Santa Teresa in New Mexico). Both surveys collected information on commercial and noncommercial activity, as well as businesses' perceived exposure to a cessation of commercial traffic at BOTA PoE.

Survey 1 was distributed to firms engaged in cross-border trade across the following industries: manufacturing, transportation, warehousing, customs brokerage, and 3PL (logistics, transportation, warehousing, and/or inventorying). Survey 2 was distributed to businesses whose commercial activity is not directly associated with cross-border trade but may still be indirectly impacted by it. Respondents who fell outside the industry-specific scope of Survey 1 received Survey 2 by default through a self-selection mechanism embedded in the survey platform. For the remainder of this section, Survey 1 respondents are referred to as "firms" and Survey 2 respondents are referred to as "businesses". Inclusion in either survey group did not assume that a potential operational change at BOTA would affect all respondents in the same manner or to the same extent, if at all.

Participants accessed the survey electronically via a QR code distributed through email outreach and business events throughout the Paso del Norte region between April and July 2026. Participants could complete the survey in English or Spanish and could submit their response anonymously or under their company's name. As of July 14, 2026, the Hunt Institute had recorded 263 unique, complete responses. Survey results were calculated using the completed responses for each question. Because respondents were not required to answer every question, the number of valid responses varies by survey item.

FIRMS VS. BUSINESSES

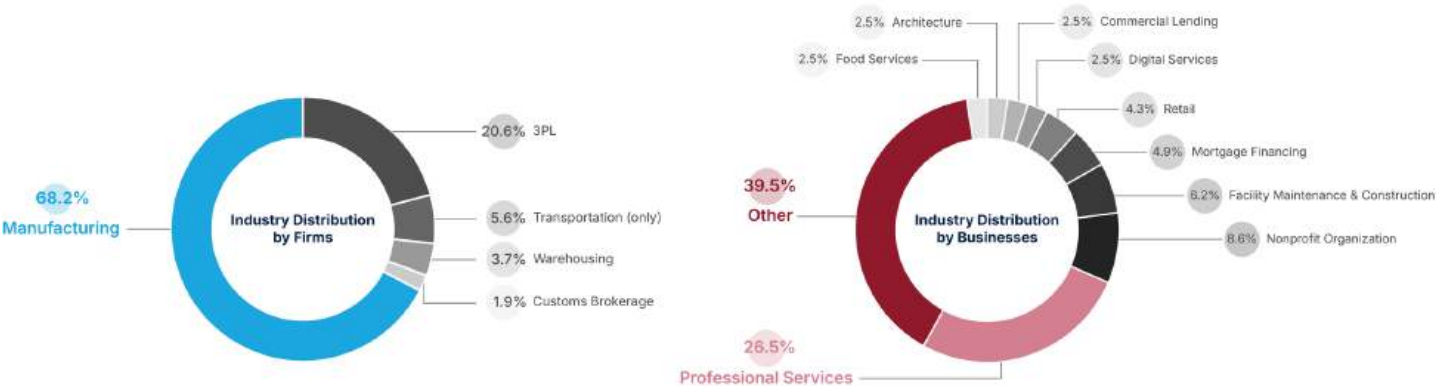
Firms are businesses directly engaged in cross-border trade, while businesses are those indirectly affected by cross-border trade activity.



Bridge of the Americas PoE located in El Paso, Texas

ii. Respondent Industry Distribution

Figure 28. Industry Distribution by Survey Respondents



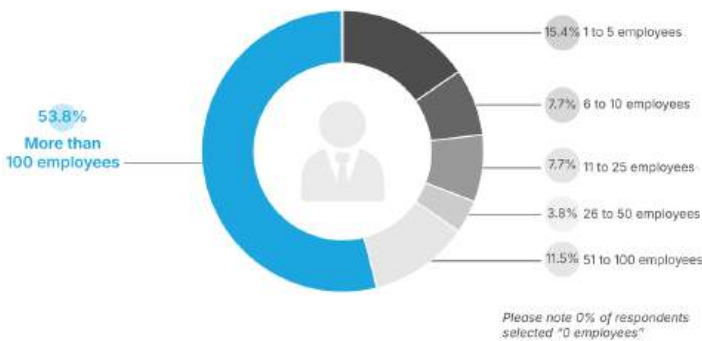
Note: Survey responses were collected between April and July of 2026.
Source: The Hunt Institute.

Figure 28 shows the industry distribution of the survey respondents in Surveys 1 and 2. The left-hand pie chart presents the industry composition of firms participating in the survey. Manufacturing firms accounted for 68.2% of respondents, followed by third-party logistics (3PL) providers at 20.6%. The firm survey section received 107 complete responses.

The right-hand pie chart summarizes the industry sectors represented by businesses whose commercial activity is not directly associated with cross-border trade but may still be indirectly impacted by it. A total of 156 businesses were included in this classification. Professional services represented 26.5% of respondents, while 39.5% were classified in other industries. The remaining businesses were distributed across a range of sectors, including human services, retail, real estate, accommodation, construction, and other service-oriented industries.

iii. Findings from Firms

Figure 29. Number of Employees by Firm

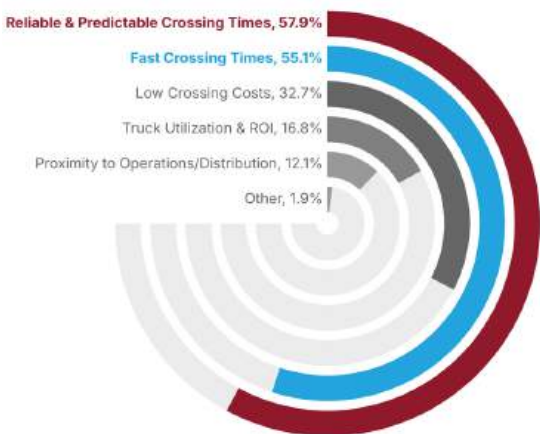


Note: Survey responses were collected between April and July of 2026.
Source: The Hunt Institute.

Number of Employees

The largest share of responses consisted of firms with more than 100 employees (53.8%), indicating that most survey respondents were medium- and large-sized businesses. The second largest share consisted of firms with 1 to 5 employees (15.4%), followed by firms with 11 to 25 employees (7.7%) and firms with 51 to 100 employees (11.5%). Each of the remaining categories represented less than 10% of overall responses.

Figure 30. Most Important Factors for Commercial Cross-Border Operations



Note: Survey responses recorded between April and July of 2026. Respondents were directed to select all that apply; consequently, the percentages do not sum to 100%.

Source: The Hunt Institute.

Current Border-Trade Dynamics

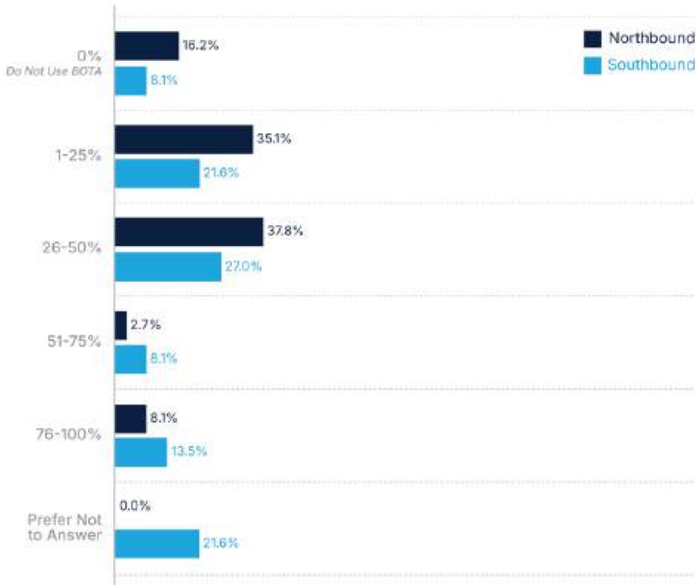
Over half of respondents identified reliable and predictable crossing times (57.9%) and fast crossing times (55.1%) as the most important factors influencing commercial cross-border operations. Approximately a third of respondents (32.7%) identified low crossing costs as an important factor.

Regarding northbound commercial traffic through BOTA (from Mexico to the U.S.), over 80% of surveyed firms reported using BOTA. More specifically, just over 70% of firms reported that 1% to 50% of their commercial crossings pass through BOTA, while 10.8% reported that more than 50% of their crossings use BOTA. In contrast, 16.2% reported not using BOTA in their commercial crossings.

57.9% OF FIRMS

IDENTIFY RELIABLE & PREDICTABLE CROSSING TIMES AS A TOP PRIORITY

Figure 31. Commercial Crossings Distribution through BOTA



Note: Survey responses recorded between April and July of 2026.

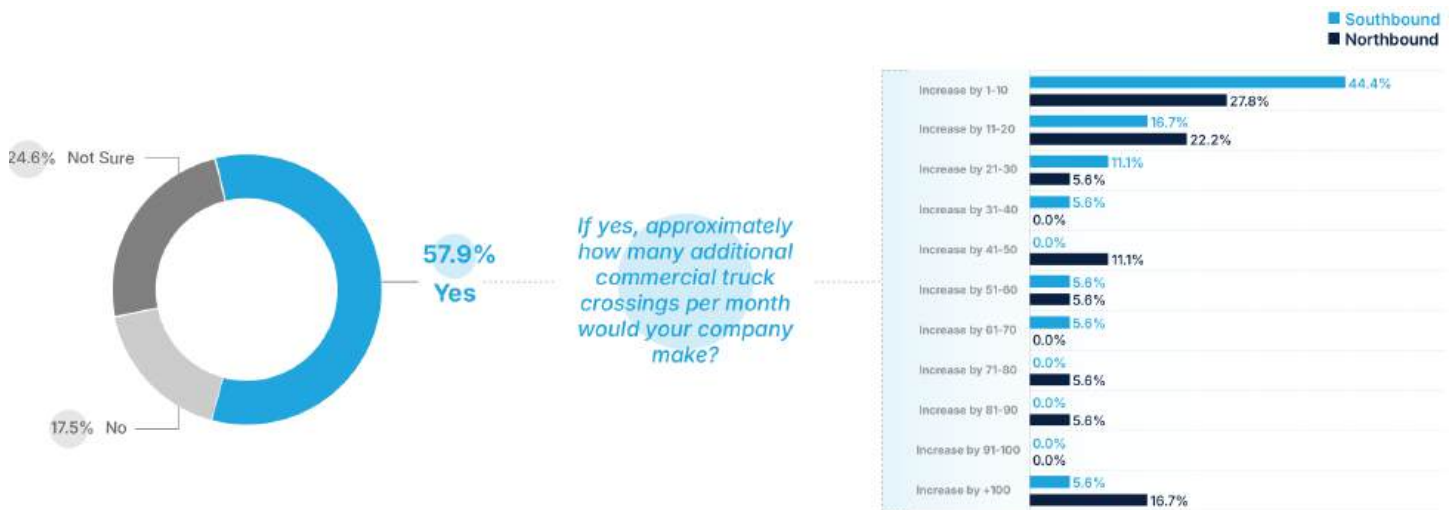
Source: The Hunt Institute.

OVER 80% OF FIRMS

USE BOTA FOR NORTHBOUND COMMERCIAL CROSSINGS

For southbound commercial traffic (from the U.S. to Mexico), 48.6% of surveyed firms reported sending between 1% and 50% of their shipments through BOTA, while 21.6% indicated that more than 50% of their shipments are processed through BOTA.

Figure 32. Potential Increase in BOTA Use with Restoration of 12-Hour Daily Operations



Note: Survey responses recorded between April and July of 2026. BOTA's commercial operating hours were reduced beginning in 2020. Before the reduction, the port processed commercial traffic for 12 hours per weekday, from 6:00 a.m. to 6:00 p.m., with Saturday operations from 6:00 a.m. to 2:00 p.m. Beginning in 2020, weekday commercial operations were reduced to 6:00 a.m.–4:00 p.m., and Saturday operations were discontinued. Operating hours were subsequently reduced further to 6:00 a.m.–2:00 p.m. on weekdays.

Source: The Hunt Institute.

A total of 57.9% of surveyed firms indicated they would increase their commercial border crossings at BOTA if operational hours were extended four hours per day. By contrast, 17.5% indicated they would not, and 24.6% were unsure. These responses suggest there may be unmet demand for extended hours.

As Jose Cuautle of Transportes Paso del Norte notes in his interview, a second shipment of daily goods is typically transported later in the day under the current maquiladora cycle, often shipped after 3 p.m. (see the 'Firm Case Studies and Stakeholder Perspectives' section of this report for additional information). Due to the 2:00 p.m. closure of commercial operations at BOTA, the second half of daily maquiladora production cannot currently be routed through the port.

Among firms that expressed interest in extended operating hours at BOTA, approximately 50% reported they would increase both northbound and southbound crossings by 1 to 20 trucks per month under this scenario. Moreover, 16.7% of respondents would increase their monthly northbound crossings by more than 100 trucks.

**57.9%
OF FIRMS**

**MAY INCREASE BOTA CROSSINGS
WITH EXTENDED HOURS**

Table 15. Northbound Commercial Crossings Redistribution if Commercial Traffic at BOTA Ceased

	Ysleta-Zaragoza	Tornillo-Guadalupe	Santa Teresa
0%	8.9%	17.8%	15.6%
1-25%	8.9%	20.0%	24.4%
26-50%	17.8%	6.7%	15.6%
51-75%	6.7%	6.7%	8.9%
76-100%	57.8%	0.0%	0.0%
Not Sure Yet	0.0%	48.9%	31.1%

Table 16. Southbound Commercial Crossings Redistribution if Commercial Traffic at BOTA Ceased

	Ysleta-Zaragoza	Tornillo-Guadalupe	Santa Teresa
0%	6.7%	15.6%	11.1%
1-25%	0.0%	8.9%	17.8%
26-50%	6.7%	4.4%	8.9%
51-75%	6.7%	0.0%	8.9%
76-100%	42.2%	0.0%	0.0%
Not Sure Yet	37.8%	71.1%	53.3%

IF BOTA CEASED COMMERCIAL OPERATIONS, YSLETA MAY ABSORB MOST NORTHBOUND & SUBSTANTIAL SOUTHBOUND TRAFFIC

Note: Survey responses recorded between April and July of 2026. Values sum up to 100% for each port of entry.

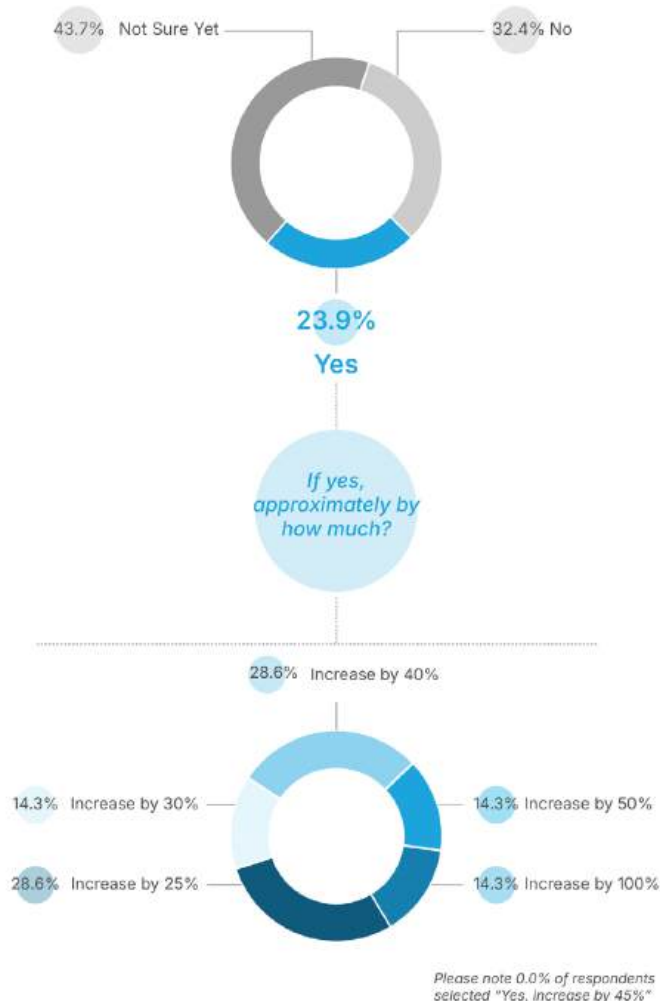
Source: The Hunt Institute.

Expected Effects of the BOTA's Cessation of Commercial Operations

If BOTA were to cease commercial traffic operations, nearly 60% of respondents reported that the Ysleta PoE would absorb 76% to 100% of their northbound traffic. One-fifth of respondents reported that 1% to 25% of their traffic would be rerouted to the Tornillo land port, while 17.8% said none of their northbound commercial traffic would cross through this PoE. Nearly a fourth of respondents said Santa Teresa would capture between 1% and 25% of their northbound traffic. Overall, these figures show a strong similarity with the redistribution shares used in the Economic Impact section.

Under this same scenario, almost half of the survey respondents reported that 76% to 100% of their southbound commercial traffic would be absorbed by the Ysleta PoE. For Tornillo, 15.6% reported no plans to route southbound traffic through this port. At the Santa Teresa PoE, 17.8% of respondents reported that 1% to 25% of their southbound traffic would cross through the port. As with the northbound redistribution responses, these figures show a strong similarity with the redistribution shares used in the Economic Impact section.

Figure 33. Shipment Rerouting to PoEs Outside of the Paso del Norte Region if Commercial Traffic at BOTA Ceased



Under this same scenario, approximately a quarter of respondents indicated they would reroute some or all of their shipments to other PoEs outside the Paso del Norte region. Within that group, 14.3% indicated that they would reroute the entirety of their shipments outside the region. This can likely be attributed to anticipated changes in production and logistics cycles, especially for firms that operate using just-in-time manufacturing systems. In some interviews, interviewees indicated that they would reduce their operational presence in the region rather than leave it entirely.

23.9% OF FIRMS

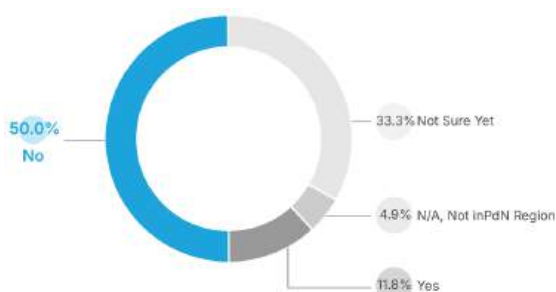
MAY REROUTE SHIPMENTS OUTSIDE THE PDN IF BOTA COMMERCIAL TRAFFIC CEASED

11.8% OF FIRMS

MAY CONSIDER RELOCATING OUTSIDE THE PASO DEL NORTE REGION IF BOTA COMMERCIAL TRAFFIC CEASED

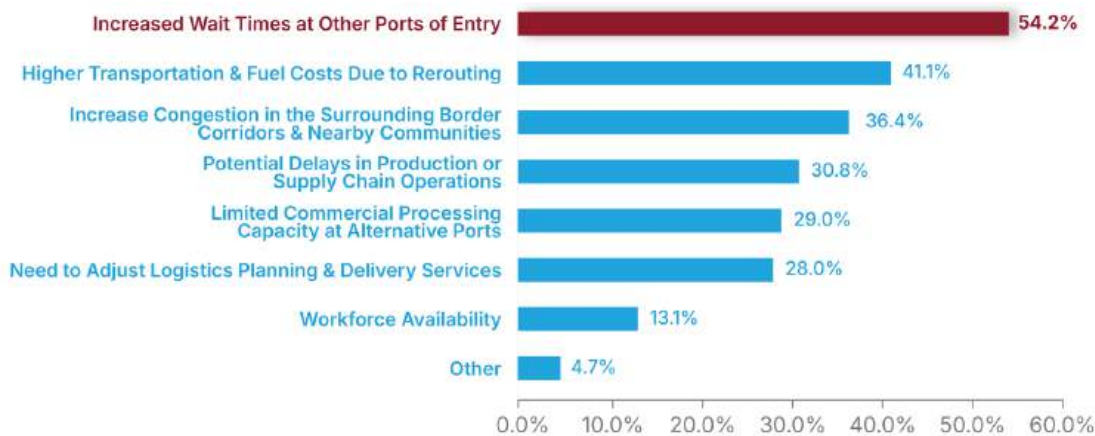
Of the firms surveyed, half expected to remain in the Paso del Norte region if commercial traffic at BOTA ceases, while 11.8% would consider relocating outside the paso del Norte region. A third of respondents were unsure whether they would relocate under this scenario.

Figure 34. Potential Relocation Outside the Paso del Norte Region if Commercial Traffic at BOTA Ceased



Note: Survey responses recorded between April and July of 2026.
Source: The Hunt Institute.

Figure 35. Main Operational Challenges for Firms if Commercial Traffic at BOTA Ceased



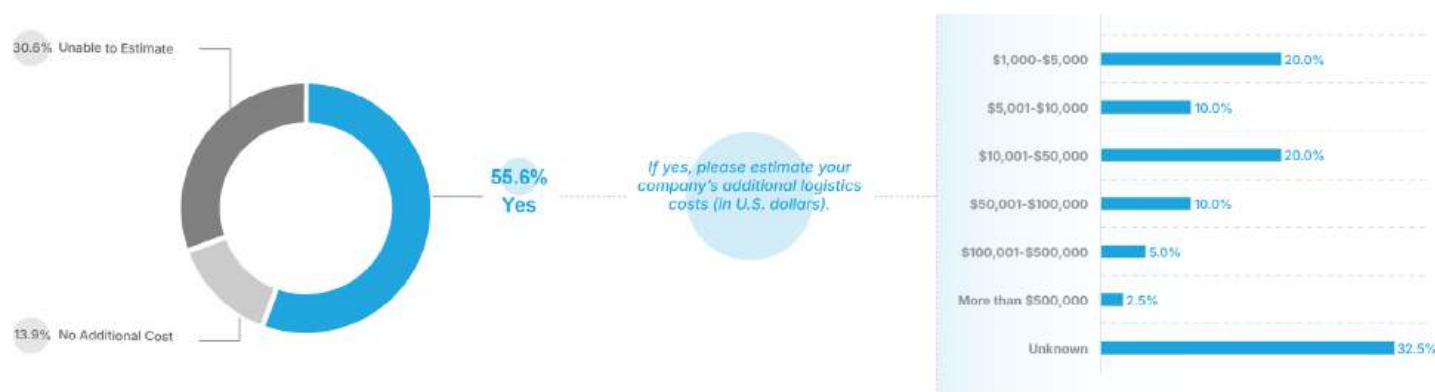
Note: Survey responses recorded between April and July of 2026. Respondents were directed to select all that apply; consequently, the percentages will not sum to 100.

Source: The Hunt Institute.

Over half of respondents identified increased wait times at other PoEs as the most commonly anticipated operational challenge if BOTA's commercial traffic were to cease. Other frequently identified challenges included higher transportation and fuel costs due to rerouting (41.1%), increased congestion in surrounding corridors (36.4%), and potential delays in production or supply chain operations (30.8%). These responses mirrored the views expressed across most testimonial interviews, with many of the operational challenges being identified as downstream effects of increased wait times at other PoEs.

**INCREASED WAIT TIMES AT OTHER PDN POES
ARE THE PRIMARY ANTICIPATED CHALLENGE
IF BOTA COMMERCIAL TRAFFIC CEASED**

Figure 36. Anticipated Changes to Logistics Costs if Commercial Traffic at BOTA Ceased



Note: Survey responses recorded between April and July of 2026.

Source: The Hunt Institute.

Notably, 55.6% of respondents expected an increase in monthly logistics costs if BOTA were to end its commercial traffic operations, while 13.9% expected no additional costs, and about a third were unsure.

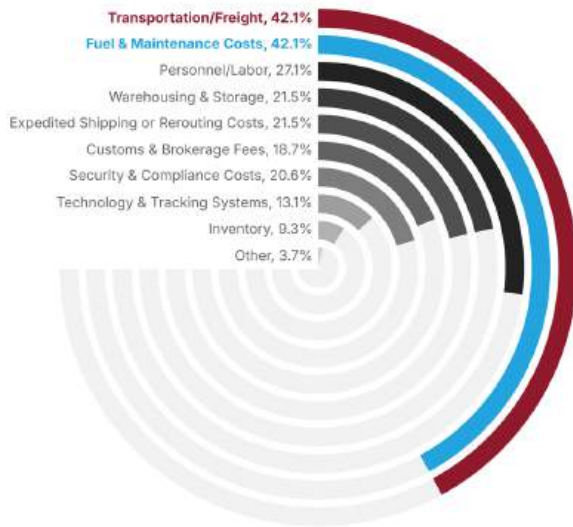
Among respondents providing information on additional logistics costs, 30% anticipated additional costs of \$1,000–\$10,000, while 20% estimated costs between \$10,001 and \$50,000. Smaller shares reported higher cost ranges, including 10% estimating \$50,001–\$100,000 and 2.5% anticipating costs exceeding \$500,000.

**55.6%
OF FIRMS**

**EXPECTED MONTHLY LOGISTICS
COSTS TO INCREASE IF BOTA
COMMERCIAL TRAFFIC CEASED**



Figure 37. Potential Additional Logistics Costs



Note: Survey responses recorded between April and July of 2026. Respondents were directed to select all that apply; consequently, the percentages will not sum to 100.

Source: The Hunt Institute.

**42.1%
OF FIRMS**

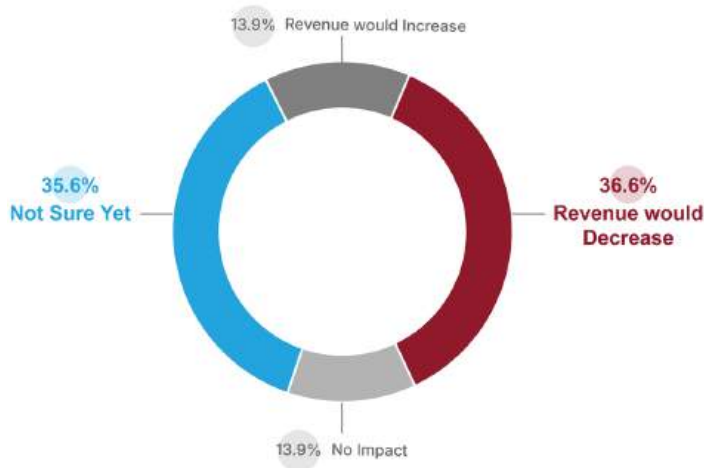
**CITE TRANSPORTATION & FUEL/
MAINTENANCE COSTS AS THE
LEADING CONTRIBUTORS TO
POTENTIAL ADDITIONAL LOGISTICS
COSTS**

**>1/3
OF FIRMS**

**EXPECT ANNUAL REVENUE TO
DECREASE IF COMMERCIAL TRAFFIC
AT BOTA CEASES**

Over a third of the surveyed firms expected their annual revenue to decrease if commercial traffic at BOTA ceased, while 13.9% expected their revenue to increase. A total of 35.6% of respondents were unsure what to expect for revenue under this scenario, and 13.9% expected no impact.

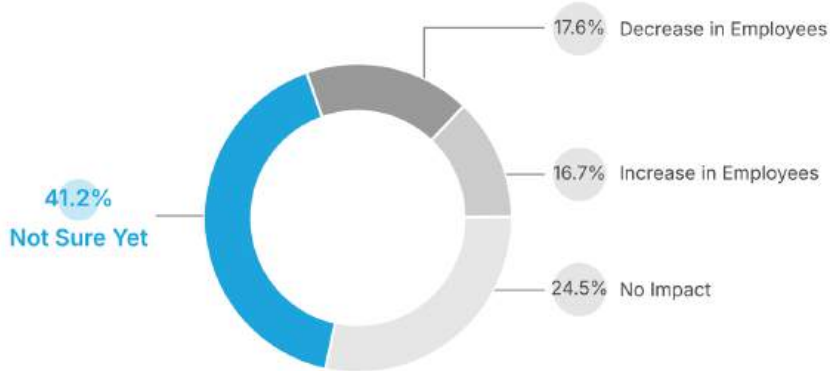
Figure 38. Expected Impact on Annual Revenue if Commercial Traffic at BOTA Ceased



Note: Survey responses recorded between April and July of 2026.

Source: The Hunt Institute.

Figure 39. Expected Impact on Employee Headcount if Commercial Traffic at BOTA Ceased

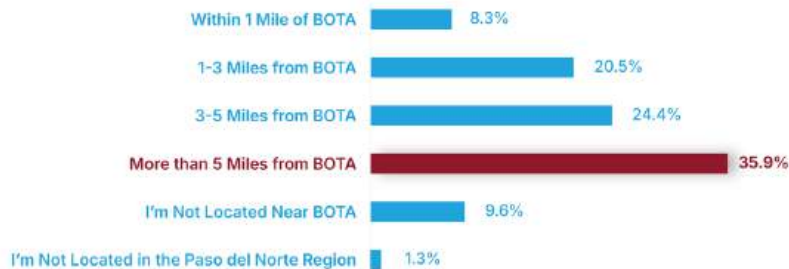


Note: Survey responses recorded between April and July of 2026.
Source: The Hunt Institute.

Regarding potential employment effects from the closure of commercial operations at BOTA, about a fourth of respondents expected no impact. Another 17.6% predicted an increase in their number of employees, while 16.7% expected a decline. Over 40% were unsure of the impact on their employee headcount. Firms' expected increase in employee headcount can be partially attributed to limits on commercial truck drivers' working hours. Past a set number of daily working hours, drivers can no longer legally operate their trucks, introducing the need for a second driver to take over on the same day.

iv. Findings from Businesses

Figure 40. Business Distance from BOTA

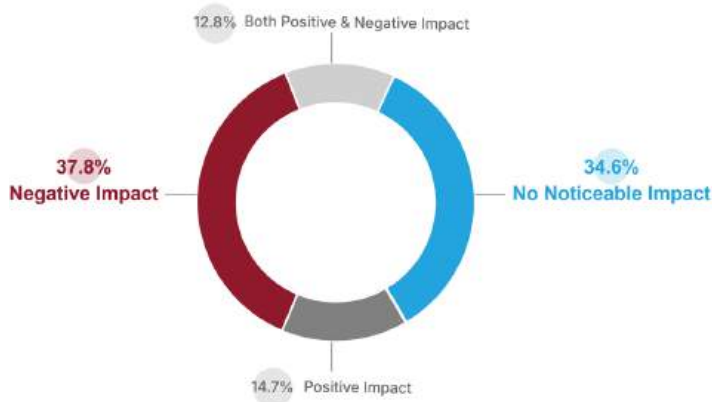


Note: Survey responses recorded between April and July of 2026.
Source: The Hunt Institute.

Current Border-Related Dynamics

Among the businesses in this survey, 8.3% reported being located within one mile of BOTA. The largest share of businesses surveyed was located more than five miles from BOTA (35.9%). Businesses within three to five miles accounted for the second-largest share of responses (24.4%), followed by those within one to three miles of BOTA (20.5%). The remaining 9.6% of respondents reported not being located near BOTA, and 1.3% were located outside the Paso del Norte region.

Figure 41. Border-Related Traffic Impact on Businesses

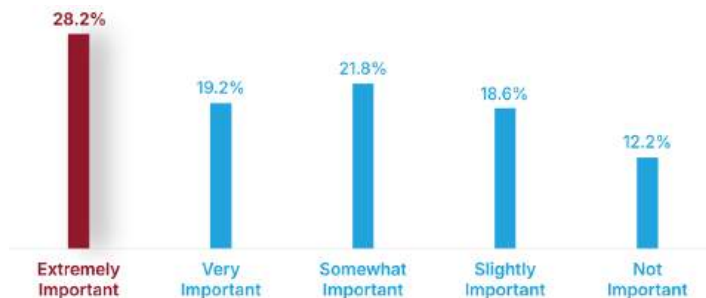


Overall, 37.8% of respondents reported being negatively impacted by border-related traffic (long border wait times), while 14.7% reported a positive impact. Roughly a third of respondents reported no effect from border-related traffic, and 12.8% reported being affected both positively and negatively.

The largest share of responses (28.2%) identified traffic generated by BOTA as extremely important to their business, while 19.2% identified it as very important. About 21.8% of respondents perceived traffic generated by BOTA as somewhat important, and 18.6% as slightly important. Only 12.2% of respondents considered it not important to their business.

Note: Survey responses recorded between April and July of 2026.
Source: The Hunt Institute.

Figure 42. Importance of Traffic Generated by BOTA to Businesses



Note: Survey responses recorded between April and July of 2026. Traffic refers to vehicle and pedestrian traffic.
Source: The Hunt Institute.

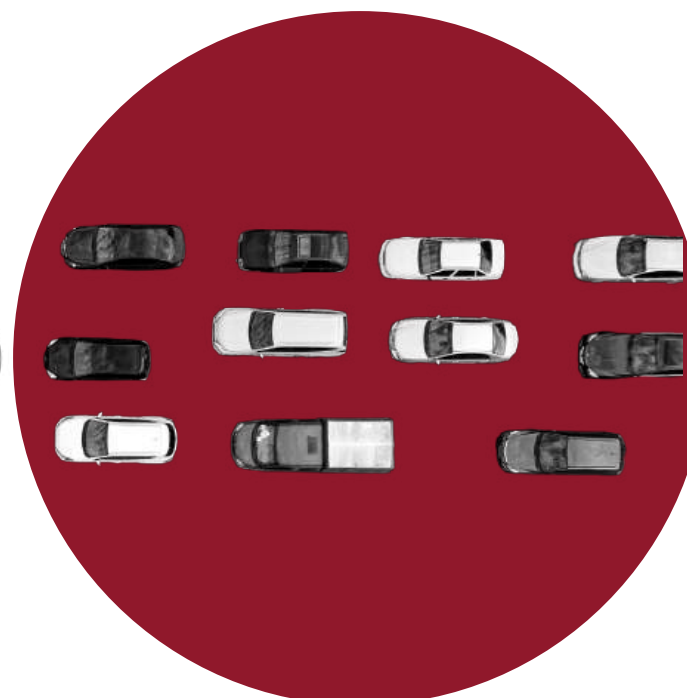
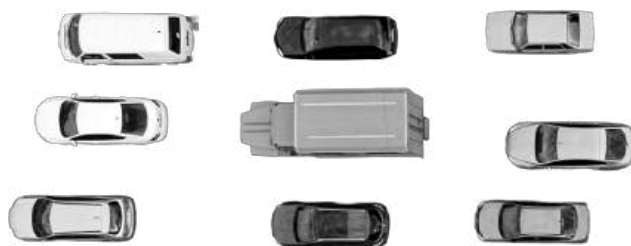
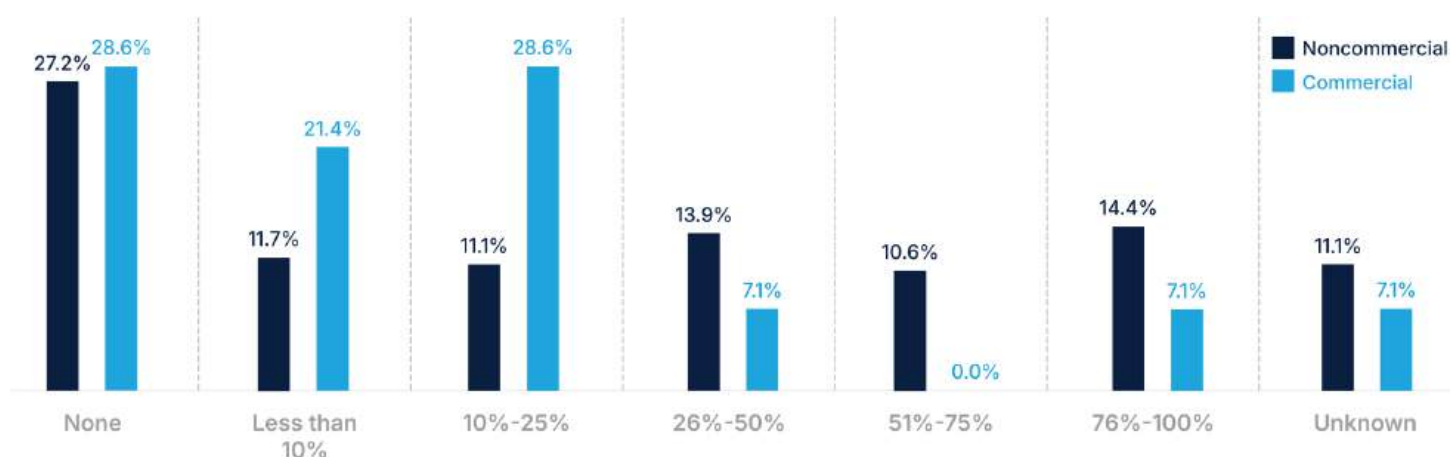


Figure 43. Business Customers Connected to Cross-Border Activity



Note: Survey responses recorded between April and July of 2026.
Source: The Hunt Institute.

The survey results indicate that cross-border activity represents an important source of customers for many businesses, although the degree of dependence varies. Overall, 61.7% of surveyed businesses reported that their customer base is connected to commercial cross-border traffic, while 64.3% reported connections to noncommercial cross-border traffic.

Among businesses connected to commercial crossings, 38.9% of respondents indicated that more than one-quarter of their customers are engaged in cross-border activity, including 13.9% reporting that 26%–50% of their customers, 10.6% reporting 51%–75%, and 14.4% reporting 76%–100%.

Among businesses connected to noncommercial crossings, 21.4% of respondents reported that less than 10% of their customers are driven by cross-border activity, while 28.6% indicated that 10%–25% of their customers are cross-border related. Only 14.2% of noncommercial respondents indicated that more than one-quarter of their customers are connected to cross-border travel.

6.17%
OF BUSINESSES
HAVE CUSTOMERS
CONNECTED TO COMMERCIAL
CROSS-BORDER TRAFFIC

Figure 44. Anticipated Impact of BOTA Commercial Operations Closure on Businesses



Note: Survey responses recorded between April and July of 2026. Respondents were directed to select all that apply; consequently, the percentages do not sum to 100%.

Source: The Hunt Institute.

Figure 45. Anticipated Opportunities for Businesses if Commercial Traffic at BOTA Ceased



Note: Survey responses recorded between April and July of 2026. Respondents were directed to select all that apply; consequently, the percentages do not sum to 100%.

Source: The Hunt Institute.

Anticipated Impacts of BOTA's Commercial Operations Closure

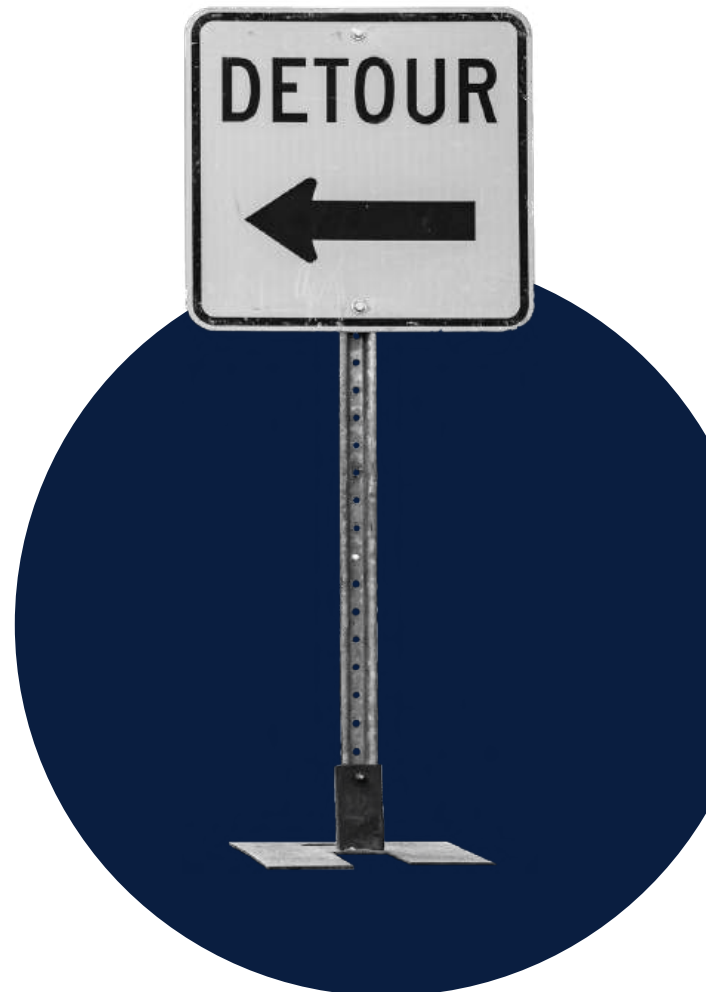
Survey results indicate that 40.4% of surveyed businesses identified delays in employee arrivals as one of the anticipated impacts of a closure of commercial operations at BOTA. Other anticipated impacts included customer discouragement from visiting (34%), delays in customer arrivals (32.7%), delays in delivery (28.8%), and limited access to suppliers (28.2%). A total of 16.7% of respondents anticipated no impact under this scenario. The anticipated impacts recorded in these responses can likely be explained by the expected congestion at other regional PoEs following the cessation of commercial traffic at BOTA.

The most frequently identified opportunity associated with the closure of commercial operations at BOTA was access to new customers (25%), followed by new opportunities to serve travelers, commuters, or residents (24.4%). Other anticipated opportunities included reduced delivery and operational disruptions (21.8%), increased local spending in the area (19.9%), and greater visibility for local businesses (19.9%).

40.4%
OF BUSINESSES
ANTICIPATE DELAYS IN
EMPLOYEE ARRIVALS

25%
OF BUSINESSES
IDENTIFY ACCESS TO NEW
CUSTOMERS AS A POTENTIAL
OPPORTUNITY

Survey results for Paso del Norte firms indicate that most firms rely on BOTA for their current cross-border operations and that most have an interest in BOTA expanding operations if the operating schedule were to be extended. Their expectations regarding the cessation of commercial traffic at BOTA indicate that most firms would be forced to reroute through Ysleta, potentially causing border delays and increasing transportation costs. Because of the long-term effects, a quarter of surveyed firms would consider rerouting part of their shipments outside of the Paso del Norte region, while more than 10% would consider relocating their operations outside of the region. On the other hand, survey results from regional businesses indicate they see opportunities in BOTA modernization, including new customers and increased consumer spending from passenger traffic. However, some businesses expressed concerns over possible employee delays and supplier shortages if BOTA's commercial traffic were to cease.



Survey Results

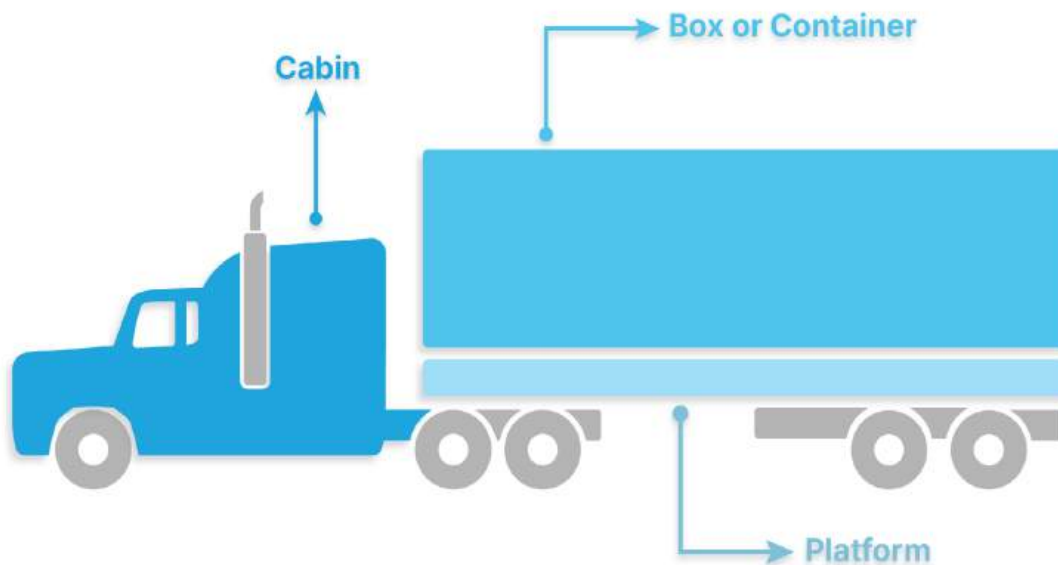
- Two surveys were designed to assess the relationship between regional businesses and the PoEs in PdN: Survey 1 for firms engaged in cross-border trade; Survey 2 for businesses whose commercial activity is not directly tied to cross-border trade.
 - *Both surveys gave respondents the opportunity to indicate their interest in participating in testimonial interviews. As of July 14, 2026, the Hunt Institute had recorded 263 unique, complete responses.*
 - *Overall, the survey results indicated that firms anticipate more operational and economic impacts from the cessation of commercial traffic at BOTA than businesses serving the broader local economy.*
- Manufacturing accounted for 68.2% of firm survey respondents, followed by third-party logistics (3PL) providers at 20.6%. The firm survey section received 107 complete responses.
- Professional services represented 28.6% of business survey respondents, while 35.7% were classified in other industries. The remaining businesses were distributed across a range of sectors, including human services, retail, real estate, accommodation, construction, and other service-oriented industries. The business survey section received 156 complete responses.
- More than 80% of surveyed firms use BOTA PoE for their northbound cross-border trade operations, while 70.0% use it for southbound operations.
- Among surveyed firms, reliable and predictable crossing times (57.9%) and fast border crossings (55.1%) were identified as the most important factors influencing cross-border freight operations.
- Without an increase to regional commercial traffic capacity, longer cross-border wait times may occur. Due to the expected additional time spent at the PoEs, most respondents reported that associated cost inputs, such as transportation, fuel, and labor would increase.
- Approximately one-quarter of surveyed firms indicated that following the cessation of commercial cargo operations at BOTA, they may redirect some or all their cargo through ports of entry outside the PdN region.
 - *In addition, 11.8% of surveyed firms indicated that they would consider relocating their operations outside the PdN region. These outcomes would represent a loss of freight activity and associated economic benefits for the region.*
- According to surveyed firms, if commercial traffic at BOTA ceased, most would re-route the majority (over 75 %) of their cargo through the Ysleta-Zaragoza PoE.
- Over 55% of firms noted they would increase their use of the bridge if commercial hours of operation were extended.
- Some businesses reported expecting opportunities from the BOTA modernization. With an expected increase in passenger crossings, some respondents foresee increased local spending, access to new customers, and opportunities to serve them.
- At the same time, many businesses expressed concerns about potential adverse effects.
 - *Some respondents anticipated delays in employee and customer arrivals, which could discourage visits. Another concern was limited access to suppliers, a challenge that could reasonably be assumed to be greater for those receiving goods directly from imports routed through BOTA.*
- Of surveyed businesses, 87.8% indicated that BOTA is slightly, somewhat, very, or extremely important to their business.

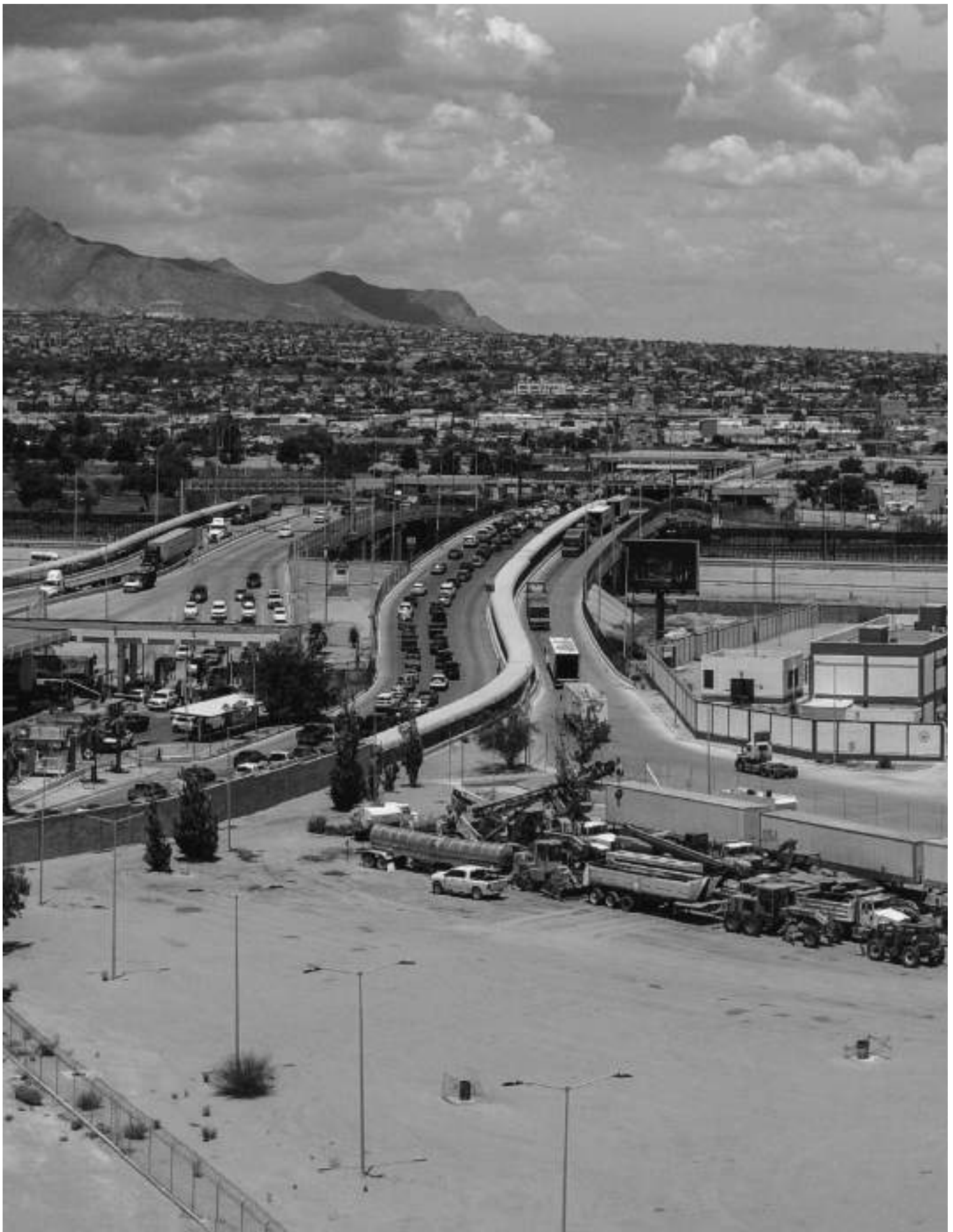
IX. FIRM CASE STUDIES AND STAKEHOLDER PERSPECTIVES

Participants in the following stakeholder interviews self-identified their interest by indicating so on the survey form distributed as part of this study a pre-selection screening. As such, the interviews included reflect the individual perspectives and experiences of the participants themselves, and do not represent the official positions or views of the Hunt Institute for Global Competitiveness.

Throughout the stakeholder interviews, participants used terms such as equipment, truck, box, and container when describing their operations. Unless otherwise specified, these terms generally refer to the complete commercial vehicle and its cargo-carrying components, including the tractor (cabin) and the attached trailer, box, truckload, or container.

Figure 46. Commercial Vehicle Components





Bridge of the Americas PoE located in El Paso, Texas

BAFAR USA / LONGHORN WAREHOUSES



Company Profile

Bafar USA, through Longhorn Warehouses in El Paso, supports Grupo Bafar, a major food manufacturer in Mexico, in its cross-border supply chain. The company recently invested approximately \$30 million in a new distribution center in El Paso. The facility serves as the company's primary logistics and customs processing center for raw materials exported to Mexico, maintaining a constant supply flow to Bafar's meat processing plant in Chihuahua. Operations include receiving, inspecting, documenting, labeling, and coordinating regulatory compliance prior to shipments crossing the border.

The facility processes approximately 20 to 25 truckloads per day, with an average value of approximately \$50,000 per shipment. More than 85% of this volume consists of fresh meat products destined for immediate processing under a just-in-time production model. The company imports about 10 weekly truckloads of Grupo Bafar processed meat products, valued at approximately \$75,000 each and made with 80% U.S.-sourced ingredients. Grupo Bafar employs approximately 15,000 people across Mexico, while Longhorn Warehouses employs more than 80 people in El Paso.



SECTOR

Food Manufacturing & Cold Chain Logistics



TRADE FLOW

20–25 Southbound | 10 Northbound
Weekly Crossings



PRIMARY PORT

Ysleta-Zaragoza (Agricultural Inspection Required)

CROSSING

Agricultural Supply Chain Requirements

- *Approximately 70% of U.S.–Mexico freight moves through the El Paso region.*
- *Zaragoza is critical due to required agricultural inspection capabilities.*
- *BOTA supports daily logistics operations by enabling efficient equipment positioning.*

IMPACT

Risks to Perishable Goods & Just-in-Time Production

- *BOTA closure would divert additional traffic to Zaragoza and increase congestion.*
- *Longer wait times could disrupt deliveries of fresh products to the Chihuahua production facility.*
- *Alternative routing through Tornillo could add approximately \$450 per truck in additional costs.*
- *Increased delays could reduce scheduling flexibility and equipment availability.*

RECOMMENDATIONS

Protecting Time-Sensitive Freight Movement

- *Expand BOTA operating capacity through longer hours and improved infrastructure.*
- *Increase agricultural inspection capabilities at alternative ports.*
- *Strengthen customs processing capacity to reduce congestion impacts.*

Border Operations

Bafar's cross-border logistics are designed around regulatory requirements for agricultural products. Approximately 70% of the company's U.S.-Mexico freight is routed through PoEs in the El Paso region, with the remaining 30% crossing through Laredo.

The company said most imports into Mexico use the Zaragoza PoE because it provides the agricultural inspection services required by Mexican authorities. The company also relies on an external inspection facility near the El Paso International Airport, where shipment documentation is reviewed, and phytosanitary inspections are completed before trucks continue directly on route to the company's processing plant in Chihuahua. Fresh products are delivered to the production line on scheduled arrival times, making transit reliability critical to operational flows.

Although BOTA is not the company's primary commercial crossing, it remains operationally important on Bafar's broader logistics network. Many of Bafar's transportation partners cross the border with empty truck containers through BOTA before arriving at the Longhorn warehouse for loading, indicating that the bridge is an important component of daily equipment positioning. Bafar executives informed that the recent investment in Longhorn's new distribution facility was directly influenced by its proximity to BOTA and the expectation that the crossing could support future growth in logistics.



When we built this building, we had in mind the reactivation of early exports. If BOTA were to streamline its processes, we could import and export through that crossing, since we are just five minutes away. My plan was for all imports to pass through there.

- Ana María Velo
General Manager at Longhorn Warehouses & International Trade Manager at Grupo Bafar



Anticipated Operational Impacts

Company representatives indicated that closing BOTA would affect both regional traffic patterns and Bafar's transportation network. Empty trucks that currently use BOTA to reach the Longhorn warehouse would be diverted to other ports of entry, potentially increasing congestion and travel times before scheduled pickups could begin.

The company anticipates commercial traffic displaced from BOTA to concentrate primarily at the Zaragoza PoE, placing additional pressure on the crossing that already handles most of Bafar's imports. Longer wait times would increase the risk of disrupting deliveries of highly perishable products that move directly from suppliers in the United States to production lines in Chihuahua.

Company representatives noted that Tornillo could become a practical alternative because of its location along the route to Chihuahua. However, the port currently lacks the agricultural inspection infrastructure for meat products. Without the Secretariat of Agriculture and Rural Development (SADER) inspection services at or near the port, shipments crossing through Tornillo would need to travel to a separate inspection facility before continuing south.⁴⁵ According to company estimates, this additional routing could increase transportation costs by an estimated \$450 per truck in addition to the current average transportation cost of approximately \$1,400 per shipment. Shipments moving within the El Paso area could also incur additional freight charges because carriers would need to travel longer distances.

The company further emphasized that prolonged congestion would reduce scheduling flexibility within its just-in-time operations, particularly because shipments scheduled for a given day are expected to cross the border on the same day. During previous border disruptions, Bafar temporarily rerouted shipments through Santa Teresa, Nogales, and Ojinaga, demonstrating the company's ability to implement operational flexibility while also illustrating the additional complexity and cost associated with alternative routes and additional measures.

BAFAR USA / LONGHORN WAREHOUSES KEY TAKEAWAYS

- Bafar does not rely heavily on BOTA for loaded crossings today, but the bridge remains important for positioning empty trucks and supporting carrier access to its El Paso warehouse.
- Company representatives indicated a BOTA closure would likely shift additional commercial traffic to Zaragoza, increasing congestion at the same crossing that Bafar depends on for most regulated meat shipments.
- Because Bafar transports fresh, highly perishable products under a just-in-time model, longer wait times could disrupt scheduled deliveries to the Chihuahua production line.
- Tornillo could be a strategic alternative for Bafar because of its route toward Chihuahua, but it currently lacks the SAGARPA/agricultural inspection infrastructure needed for meat shipments.
- According to company estimates, if shipments were rerouted through Tornillo without inspection capacity, an added cost of approximately \$450 per truck would be incurred, on top of the current average cost of about \$1,400 per shipment.

⁴⁵ SADER is the federal government agency that manages Mexico's agriculture, livestock policies, and food safety.



BORDER TRUCKING COMPLIANCE GROUP

Company Profile

Border Trucking Compliance Group (BTC) was founded in 1997 to help transportation companies comply with cross-border regulatory requirements following the implementation of NAFTA. Today, the company provides permitting, insurance, and regulatory compliance services for Mexican, U.S., and Canadian carriers operating throughout North America. The firm supports approximately 700 transportation companies that collectively handle nearly 9,000 cross-border truck movements each month. According to company representatives, this client base provides the firm with insight into freight operations and border-crossing patterns throughout the Paso del Norte region.



SECTOR

Transportation Compliance & Logistics Services



TRADE FLOW

9,000 Monthly Truck Movements
7,000 Loaded | 2,000 Empty



PRIMARY PORTS

Zaragoza 78% | Santa Teresa 15%
BOTA 5% | Tornillo 2%



BOTA is valuable because it is centrally located, toll-free, and fast. If carriers had more operating hours, they would use it even more. Closing it doesn't eliminate demand; it simply shifts traffic to infrastructure that is already under pressure.

- Alexis Reza
Director of Operations



CROSSING

Regional Freight Distribution

- Supports approximately 700 transportation companies operating throughout North America.
- BOTA serves primarily as the region's empty trailer repositioning corridor.
- Empty trailers are essential to maintaining manufacturing supply chains.

IMPACT

Reduced Capacity & Fleet Productivity

- Empty truck traffic would shift primarily to Zaragoza.
- Crossing times could increase by 90 minutes or more.
- Crossing costs could rise from \$150 to \$165 per trip.
- Longer travel distances and delays would reduce driver productivity and equipment utilization.
- Increased hazardous materials traffic could further strain Zaragoza operations.

RECOMMENDATIONS

Balancing Regional Freight Operations

- Expand BOTA commercial operating hours.
- Preserve BOTA's role for empty truck movements.
- Develop a regional strategy that distributes freight more evenly across ports of entry.

Border Operations

Border Trucking Compliance Group's clients generate approximately 9,000 monthly cross-border truck movements, including 7,000 loaded and 2,000 empty crossings. Of the loaded freight, approximately 78% cross through Ysleta-Zaragoza, 15% through Santa Teresa, 5% through BOTA, and 2% through Tornillo. According to company representatives, BOTA currently handles only a limited share of loaded freight due to its limited operating hours.

Among its empty truck trips, approximately 90% (1,800 crossings) use BOTA. Company representatives attributed this concentration to the fact that it is a toll-free land port, is centrally located, and offers a relatively efficient crossing. BTC emphasized that empty crossings play a critical role in the region's manufacturing supply chains because trailers are frequently repositioned multiple times as raw materials and components move through different production stages before becoming finished products.

Anticipated Operational Impacts

BTC representatives indicated that closing BOTA would significantly disrupt current empty truck movements, forcing most carriers to reroute through Zaragoza, where crossing times are already substantially longer. While an empty truck may currently cross BOTA in approximately 45 minutes, company representatives estimated that rerouting could add 90 minutes or more to a trip, depending on congestion.

The company estimates that the average cost of a crossing would increase from approximately \$150 to \$165 per trip due to additional tolls, fuel consumption, and longer driver utilization. Alternative crossings would also require longer travel distances. Company estimates show that routing a trip through Santa Teresa could add approximately 52 miles to Santa Teresa and 76 miles to Tornillo, relative to the current BOTA trip.

Longer crossing times would also reduce driver productivity. Company representatives reported that many local operators currently complete two round-trips per day, but additional delays could make it more difficult for some drivers to complete a second trip while remaining within applicable federal hours-of-service regulations. The company further indicated that even then, increasing the number of drivers would not fully offset these productivity losses because crossing capacity would remain constrained.

Representatives also expressed concern that hazardous materials traffic, including fuel tankers and industrial gas carriers, would become increasingly concentrated at the Ysleta-Zaragoza PoE. In the company's assessment, this shift can further increase congestion at a port that already processes the majority of commercial freight in the region.

Rather than closing BOTA, the company recommends expanding its commercial operating hours. Company representatives stated that carriers would make greater use of the bridge if it remained available for longer periods. They also emphasized the need for a coordinated regional strategy that better balances freight traffic across all PoEs while preserving BOTA's role in supporting empty truck movements.

BORDER TRUCKING COMPLIANCE GROUP KEY TAKEAWAYS

- *BTC supports approximately 700 clients representing nearly 9,000 monthly cross-border truck movements.*
- *Approximately 2,000 of these monthly crossings are empty trucks, with 1,800 currently using BOTA due to its speed, location, and toll-free access.*
- *Company representatives indicated that closing BOTA would shift most empty truck traffic to Zaragoza, increasing congestion and adding approximately 90 minutes to many crossings.*
- *The company estimates crossing costs would increase from approximately \$150 to \$165 per trip due to additional mileage, tolls, fuel, and driver time.*
- *BTC said that longer crossing times would reduce the number of trips drivers can legally complete each day, lowering equipment operational efficiency and increasing transportation costs.*
- *Representatives advise that expanding BOTA's commercial operating hours would provide greater regional economic benefits than closing the facility and would help preserve the competitiveness of the Paso del Norte manufacturing and logistics corridor.*

ECONOMY WHOLESALE GROCERS

Company Profile

Economy Wholesale Grocers (Economy Cash & Carry) is an El Paso-based wholesale grocery distributor founded in 1958 with commercial operations serving customers in Mexico dating back to the 1950s. The company serves independent retailers, supermarkets, and distributors throughout Mexico, specializing in grocery products and private-label brands. The company also imports Mexican products for its retail operations and manages a highly regulated supply chain that includes USDA oversight and refrigerated shipments for select products. According to company representatives, BOTA is the company's primary commercial crossing due to its proximity, accessibility, and long-established role in facilitating cross-border commerce.



SECTOR

Wholesale Grocery Distribution & Cross-Border Trade



TRADE FLOW

50-75 Southbound Weekly Crossings



PRIMARY PORTS

BOTA

CROSSING

BOTA-Dependent Distribution Network

- *BOTA provides the shortest connection between Economy's El Paso facility and Mexican customers.*
- *Supports efficient movement of grocery products, including regulated and refrigerated shipments.*
- *Reduced commercial operating hours have already affected carrier flexibility.*

IMPACT

Higher Costs Across the Food Supply Chain

- *BOTA closure could increase border wait times and transportation costs by approximately 50%.*
- *Longer delays would reduce truck productivity and increase inventory carrying costs.*
- *Disruptions could affect delivery schedules for retailers and distributors across Mexico.*
- *Refrigerated shipments would face additional compliance and product-quality risks.*

RECOMMENDATIONS

Maintaining Cross-Border Competitiveness

- *Preserve commercial access through BOTA.*
- *Expand operating hours to improve freight flexibility.*
- *Increase capacity at alternative crossings to prevent congestion.*
- *Support efficient customs and inspection processes for regulated goods.*

The Bridge of the Americas represents our history, trade, culture and bi-national commerce. The commercial lanes are a crucial link to retaining and expanding business opportunities, employment, and tax revenues for Texas and our region. These lanes have been established over decades and provide the most secure and direct route to our largest Mexican trading partner, the State of Chihuahua.

- Paul Dipp
CEO & President

Border Operations

For Economy Wholesale Grocers, BOTA is the primary commercial gateway supporting its international operations. According to CEO and President Paul Dipp, the company exports approximately 50 full truckloads each week, with volumes increasing to as many as 75 truckloads during seasonal peaks. Because trucks arrive empty to the U.S. from Mexico to then be loaded at Economy's facilities, the operation generates approximately 100 cross-border truck movements each week, at peak 150.

According to company representatives, BOTA was selected because it provides the shortest connection between its El Paso distribution center and customers throughout northern Mexico. Most trucks can reach the bridge within minutes, allowing products to move efficiently through inspections, customs procedures, and onward to destinations across Chihuahua and other Mexican states. Dipp explained that this efficiency has become increasingly important as export requirements have grown more complex, particularly for regulated and refrigerated products.

Dipp noted that the gradual reduction in BOTA's commercial operating hours has already reduced its attractiveness for some carriers.

Anticipated Operational Impacts

According to the company, a permanent closure of BOTA's commercial operations would concentrate traffic at other crossings, particularly Zaragoza. Company representatives expressed concern that existing infrastructure and roadway access were not designed to absorb a significant increase in truck volumes. The company estimates that transportation costs and border wait times could each increase by approximately 50% due to longer queues, additional travel time, and reduced operational efficiency.

According to the company, these delays could disrupt shipment scheduling, reduce truck productivity, increase inventory carrying costs, and make it more difficult to coordinate agricultural inspections and export compliance requirements. Although Economy primarily exports shelf-stable products, some refrigerated shipments, like lard, require continuous temperature control and timely border processing to maintain product quality and regulatory compliance.

Dipp emphasized that the impacts could extend well beyond Economy's own operations. The company's customers include many independent grocery distributors and retailers that rely on frequent cross-border deliveries to supply neighborhood stores throughout Mexico. Dipp said longer crossing times and higher transportation costs would ultimately increase distribution expenses across the supply chain.

The company also highlighted broader regional concerns, noting that redirecting commercial traffic away from BOTA would place additional pressure on surrounding transportation networks, increase congestion near alternative PoEs, and reduce the logistical advantages that have historically supported El Paso's role as a binational trade hub. Dipp stated that maintaining efficient commercial access through BOTA remains important not only for individual businesses but also for preserving the competitiveness of the regional cross-border economy.

ECONOMY WHOLESALE GROCERS KEY FINDINGS

- *Economy Wholesale Grocers exports approximately 100 cross-border truck movements per week, increasing to about 150 during peak periods.*
- *According to company representatives, BOTA serves as the primary commercial port for Economy Wholesale Grocers' customers because of its proximity to its distribution center and its efficient connection to markets throughout northern Mexico.*
- *Company representatives estimate that closing BOTA's commercial operations could increase both transportation costs and border wait times by approximately 50%.*
- *According to the company, longer delays could reduce operational efficiency, increase inventory carrying costs, complicate agricultural-regulated export processes, and disrupt delivery schedules.*
- *Economy stated that the impacts could extend beyond its operations, affecting independent retailers, regional supply chains, and the long-term competitiveness of the El Paso–Ciudad Juárez trade corridor.*

FLETES SOTELO



Company Profile

Founded in 1975, Fletes Sotelo serves the maquiladora industry in Ciudad Juárez. The company employs more than 300 people and operates approximately 200 tractors. Its facilities include administrative offices, maintenance shops, and parking for tractors and trailers. The site is monitored around the clock by security personnel and closed-circuit cameras. Fletes Sotelo serves manufacturing and logistics clients on both sides of the border and reports maintaining commercial relationships with several customers for more than 20 years. The company holds C-TPAT, BASC, OEA, and the U.S. Department of Transportation certifications.



SECTOR

Cross-Border Transportation & Logistics



TRADE FLOW

1,880 Monthly Crossings



PRIMARY PORTS

Ysleta-Zaragoza
BOTA



The main impact would not be limited to paying more for each crossing. The larger problem would be losing capacity. Longer routes and border lines reduce the number of trips each driver and truck can complete, and manufacturers eventually begin looking for locations where their supply chains are more reliable.

- Manuel Sotelo
Owner of Fletes Sotelo



CROSSING

Efficient Equipment Repositioning

- BOTA provides the most direct connection to major highways and industrial zones.
- Customers and customs brokers determine the port of entry, limiting routing flexibility.
- Lower crossing costs support efficient fleet operations.

IMPACT

Higher Costs & Reduced Operating Capacity

- Rerouting could increase costs by \$50–\$150 per crossing, depending on the alternative port.
- The company estimates it would need approximately 130 additional employees to maintain current service levels.
- Longer travel distances and border queues would reduce driver productivity and equipment utilization.
- Additional congestion at Zaragoza would further strain regional manufacturing supply chains.

RECOMMENDATIONS

Preserve & Expand Commercial Capacity

- Extend BOTA commercial operations to a 12-hour schedule.
- Add Saturday commercial operations to increase freight flexibility.
- Maintain commercial operations during future modernization to preserve regional capacity.

Border Operations

Fletes Sotelo primarily uses BOTA to move empty trailers between Ciudad Juárez and El Paso. According to the company, it averages approximately 200 northbound and 350 southbound empty-truck crossings through BOTA each month, in addition to about 20 southbound loaded crossings.

Company owner Manuel Sotelo reported that BOTA is the company's lowest-cost commercial crossing, with an average charge of approximately \$200 per truck movement, compared with \$250 through Zaragoza, \$325 through Santa Teresa, and \$350 through Tornillo.

According to the company, BOTA also provides relatively direct access to Interstate 10, U.S. 54, Loop 375, and nearby industrial areas. Representatives indicated that alternative crossings generally require longer travel routes and, in some cases, the use of roadways that may be less suited to high volumes of commercial traffic.

The company also noted that port selection is often determined by customers and customs brokers because customs documentation is prepared for a specific port of entry. As a result, Fletes Sotelo may have limited flexibility to reroute shipments based solely on wait times or transportation costs.

Anticipated Operational Impacts

Fletes Sotelo estimates that eliminating commercial operations at BOTA would remove approximately six commercial lanes currently available in the Ciudad Juárez–El Paso area. According to the company, most displaced traffic would be redirected to the Zaragoza PoE, with additional movements shifting to Santa Teresa or Tornillo.

The company estimates that rerouting trucks would increase transportation costs by approximately \$50 per crossing at Zaragoza, \$125 at Santa Teresa, and \$150 at Tornillo, regardless of whether the truck is loaded or empty. Under these estimates, a movement currently costing \$200 through BOTA would increase to \$250 through Zaragoza, \$325 through Santa Teresa, or \$350 through Tornillo.

Representatives stated that the additional costs would extend beyond fuel, mileage, and tolls. The company estimates that maintaining its current volume of approximately 1,880 crossings per month could require hiring about 130 additional employees because longer

routes and border queues would increase trip times. Drivers who currently complete multiple daily trips could be limited to one, increasing labor requirements.

The company identified reduced operational capacity as its primary concern. Representatives stated that Zaragoza already handles much of the region's commercial traffic and experiences peak wait times of one to four hours. They also noted that approximately 70% of maquiladora import and export transactions occur after 3:00 p.m., leading the company to expect additional congestion if BOTA traffic were redirected there.

Representatives further indicated that Santa Teresa and Tornillo may offer limited alternatives because of distance, roadway connectivity, and inspection capacity. According to the company, rerouting freight through these ports could increase travel time, transportation costs, and truck traffic on corridors with lower commercial volumes.

The company expressed concern that longer and less predictable border crossings could affect manufacturing schedules and future investment. Representatives cited previous border disruptions during which some shipments required up to 32 hours to cross the border, prompting some manufacturers to reroute freight through Laredo or Nogales.

Rather than eliminating commercial operations at BOTA, Fletes Sotelo supports extending the port's operating hours. The company estimates that a 12-hour commercial schedule would accommodate approximately 100 additional truck crossings per month, while Saturday operations could generate an additional 61 to 100 crossings per month.

“Competitiveness is being affected, not just that of Juárez or Chihuahua, but also that of El Paso, Las Cruces, and this entire region. If we allow this to happen, we will diminish attractiveness. Transport companies will be forced to seek work at other border crossings.

-Manuel Sotelo
Owner of Fletes Sotelo

FLETES SOTELO KEY FINDINGS

- Fletes Sotelo moves approximately 550 monthly empty-truck crossings through BOTA.
- According to the company, BOTA is its lowest-cost commercial crossing at approximately \$200 per movement, compared with \$250 through Zaragoza, \$325 through Santa Teresa, and \$350 through Tornillo.
- The company estimates that rerouting traffic from BOTA would increase costs by approximately \$50 to \$150 per affected crossing, depending on the alternative port used.
- Representatives expect that most displaced BOTA traffic would be redirected to the Zaragoza PoE.
- The company estimates that extending BOTA to a 12-hour schedule would generate approximately 100 additional monthly crossings, while Saturday operations could add between 61 and 100 crossings per month.

SPARROW COMPANY

Company Profile

Sparrow Company is a binational executive search and staffing firm headquartered in El Paso, Texas, with operations in both the United States and Mexico. The company provides executive search, direct placement, and employer of record (EOR) services for manufacturing, supply chain, engineering, and operations professionals. Its clients include manufacturers and other multinational companies operating throughout Mexico and the United States, with recruitment activities in Mexico spanning Ciudad Juárez, Tijuana, Monterrey, Saltillo, Querétaro, and Guadalajara, as well as several U.S. markets, including Orange County, California. According to CEO David Fishman, the company's location in El Paso reflects the region's access to talent and the close integration of the U.S. and Mexican labor markets.



SECTOR

Executive Search & Workforce Solutions

CROSSING

Business Connectivity

- *Frequent cross-border travel supports client meetings, recruiting, and business development.*
- *Clients rely on efficient freight movement to maintain integrated manufacturing operations.*
- *BOTA plays an important role in supporting regional business activity and supply chain connectivity.*

IMPACT

Business Investment & Employment

- *Reduced freight reliability could increase transportation costs and congestion.*
- *Companies may reevaluate future investment and logistics strategies.*
- *Slower manufacturing activity could reduce hiring across transportation, warehousing, manufacturing, and professional services.*
- *Staffing firms often observe changes in hiring activity before they appear in labor market data.*

RECOMMENDATIONS

Supporting Regional Competitiveness

- *Maintain reliable commercial border operations.*
- *Include employment impacts in future infrastructure evaluations.*
- *Preserve efficient freight movement to support long-term manufacturing investment and workforce growth.*

Border Operations

Sparrow's business depends on frequent interaction with clients and candidates on both sides of the border. While most recruitment activities can be conducted remotely, company representatives regularly cross the border to meet with clients, develop business relationships, and support hiring activities. Fishman indicated that efficient border crossings facilitate these interactions and contribute to the region's attractiveness as a location for companies operating in North America.

Although Sparrow is not directly involved in freight transportation, many of its clients operate in manufacturing, logistics, and supply chain management. According to Fishman, these companies rely on predictable cross-border freight movement as part of integrated production processes. He described examples in which products move multiple times between facilities in Mexico and the United States before final assembly and distribution, showing the operational integration of manufacturing across the border.

Fishman also noted that several clients regularly utilize BOTA for commercial crossings. He observed that the bridge's direct connection to I-10 and its role as the region's only toll-free commercial crossing make it an important component of the regional transportation network.

Anticipated Operational Impacts

Fishman stated that eliminating commercial operations at BOTA could increase transportation costs, lengthen travel distances, and reduce routing flexibility for companies currently using the bridge. He indicated that freight would likely shift to other PoEs, potentially increasing congestion and creating longer and less predictable crossing times.

According to Sparrow Company, these operational changes could also influence business decisions made by manufacturers and logistics firms. Fishman suggested that if border crossings become less predictable, companies may evaluate alternative transportation corridors or other regions that offer more efficient freight movement. While he had not received direct confirmation that companies plan to relocate, he noted that businesses routinely maintain contingency plans and may adjust operations when transportation conditions change.

Fishman further noted that changes affecting commercial traffic could extend beyond logistics by influencing employment throughout the region. Because Sparrow works directly with employers across multiple industries, he indicated that staffing firms often detect changes in hiring activity several months before they appear in official employment statistics. Although he did not provide quantitative estimates, he suggested that any reduction in manufacturing or logistics activity could affect demand for workers across transportation, warehousing, maintenance, professional services, and other industries connected to cross-border trade.

If El Paso's competitive advantage is diminished in any way, and regions such as California, New Mexico, or other parts of Texas become more attractive, businesses will logically choose those locations to maximize profitability. Many of these areas already have infrastructure plans in place, making it possible to break ground and begin operations relatively quickly.

- David Fishman
CEO

SPARROW COMPANY KEY TAKEAWAYS

- Sparrow Company said its clients rely on efficient, predictable cross-border freight movement to support integrated manufacturing operations.
- According to Fishman, BOTA's location, direct interstate access, and toll-free commercial operations contribute to its importance within the regional transportation network.
- Fishman indicated that closing BOTA to commercial traffic could increase transportation costs, reduce predictability, and shift freight to other ports of entry.
- He suggested that changes in freight efficiency could influence future business location decisions and regional hiring, although he noted that companies generally do not publicly disclose contingency plans.
- Fishman emphasized that evaluating potential employment impacts should be an important component of any assessment of changes to BOTA's commercial operations.

REXMED HEALTH/ MP LOGISTICS

Company Profile

Rexmed Health and MP Logistics are part of the M&P Group and support the cross-border medical device supply chain in the El Paso–Ciudad Juárez region. MP Logistics provides cross-border transportation and customs logistics, while Rexmed Health manufactures medical devices and products at its facility in the Bermúdez Industrial Park in Ciudad Juárez.

Company representatives said RexMed depends on the efficient movement of raw materials into Mexico and finished products to the United States, making reliable border operations essential to its manufacturing and logistics activities.



SECTOR

Medical Device Manufacturing & Logistics



TRADE FLOW

14–16 Northbound | 12 Southbound
Monthly Crossings



PRIMARY PORTS

Santa Teresa
Ysleta-Zaragoza

CROSSING

Strategic Use of Multiple Ports

- Northbound exports are routed through Santa Teresa for predictable processing.
- Southbound imports utilize Ysleta-Zaragoza for greater operating flexibility.
- Company previously used BOTA but transitioned to other ports due to more consistent processing times.

IMPACT

Regional Congestion Risks from BOTA Closure

- Additional traffic could increase congestion at Santa Teresa and Ysleta-Zaragoza.
- Current Santa Teresa wait times of 2–2.5 hours could increase.
- Transportation costs could rise 10–15% due to longer delays and reduced equipment utilization.
- Production scheduling and shipment flexibility could be affected.

RECOMMENDATIONS

Strengthening Border Reliability

- Extend commercial operating hours at high-volume ports.
- Improve staffing, documentation processing, and technology systems.
- Increase operational flexibility to reduce congestion impacts across the region.

We need to clear the busiest crossing and extend its operating hours. That doesn't mean it has to operate 24 hours a day; rather, it could start at 6:00 a.m. instead of 8:00 a.m. It's a matter of 2 hours, but those 2 hours make a difference. It benefits everyone, as it facilitates exports, makes crossings more efficient, and reduces pollution.

– Jorge Martínez
Operations Manager at MP Logistics

Border Operations

According to company representatives, cross-border trade is fundamental to Rexmed's manufacturing operations because raw materials are imported into Ciudad Juárez, while finished medical products are exported to customers in the United States. The company informed it has developed a routing strategy that relies on different PoEs depending on shipment direction. Nearly all exports (northbound shipments) are processed through the Santa Teresa PoE, while imports (southbound shipments) enter Mexico through the Ysleta-Zaragoza PoE. According to company representatives, these decisions are based on operational efficiency rather than proximity.

Company representatives stated that Santa Teresa was selected because of its relatively efficient documentation processing and predictable commercial operations. They also noted that processing times have become more consistent in recent years. In contrast, Ysleta-Zaragoza remains the preferred port for imports because its operating hours provide greater flexibility for southbound commercial traffic, reducing the likelihood of overnight shipment delays when inspections occur near closing time. The company previously used BOTA but gradually shifted its operations to other ports after identifying more consistent processing times elsewhere.

Representatives reported that Rexmed averages approximately 12 import crossings and 14 to 16 export crossings per month. Export shipments typically consist of 53-foot trailers carrying finished products valued between \$70,000 and \$120,000, while import shipments of raw materials generally range from \$25,000 to \$60,000. Because transportation services are contracted on a weekly basis, company representatives indicated that efficient scheduling is an important consideration. They reported that the average weekly cost of a tractor and driver ranges from \$2,500 to \$3,200.



There is no company that does not depend on these crossings. It creates a chain of costs, because while companies can absorb the increase in transportation costs up to a certain point, the cost to the end consumer may ultimately rise as well.

- Miryam Arizpe
Rexmed Health Plant Manager



Anticipated Operational Impacts

Although Rexmed stated that it does not currently use BOTA as part of its normal operations, company representatives anticipate that its closure would indirectly affect their business by redistributing commercial traffic to the remaining ports of entry.

The company's assessment shows that the primary anticipated impact is increased congestion at Santa Teresa and Ysleta-Zaragoza PoE, resulting in longer crossing times and reduced schedule reliability. Rexmed tracking system shows that the current wait times at Santa Teresa PoE average approximately 2 to 2.5 hours under normal operating conditions. Representatives expect that those delays could increase substantially if commercial traffic from BOTA is diverted to other crossings.

Company representatives stated that longer crossing times could reduce the company's operational flexibility, as current logistics planning allows shipments to be scheduled within narrow production windows. Under favorable conditions, the company said it can complete 2 import and 2 export crossings within a 12-hour period. Additional delays would require continuous adjustments to production schedules, shipment priorities, and equipment assignments.

The company estimates that a BOTA closure could increase transportation costs by approximately 10% to 15% as longer border wait times reduce operational efficiency. Company representatives also noted that previous border disruptions demonstrated that extended delays tie up tractors and trailers in border queues, limiting equipment availability, increasing freight rates, and reducing scheduling flexibility.

According to the company, higher logistics costs affect the entire supply chain. While manufacturers may absorb some of these increases initially, sustained cost increases can ultimately raise production costs and consumer prices.

REXMED HEALTH / MP LOGISTICS KEY FINDINGS

- Rexmed Health currently routes exports through Santa Teresa PoE and imports through Ysleta-Zaragoza PoE based on operational efficiency and operating hours.
- The company said it no longer uses BOTA but expects its closure to affect regional traffic distribution and increase congestion at the ports it currently relies on.
- Representatives anticipate longer wait times, reduced schedule reliability, higher transportation costs, and lower equipment availability if BOTA closes.
- According to the company, transportation costs are estimated to increase by approximately 10% to 15% due to longer crossing times and reduced equipment utilization.
- Company representatives believe that extending commercial operating hours at high-volume ports during certain hours could improve regional border efficiency and help mitigate congestion.

S-MART



Company Profile

S-Mart operates an extensive cross-border supply chain to replenish stores with food, consumer goods, and other retail products. The company relies on multiple PoEs to move imports efficiently between the suppliers distribution facilities and warehouses in El Paso and S-Mart distribution centers in Ciudad Juárez. During the first half of 2026, the company processed approximately 27,800 cross-border truck movements, with company representatives reporting that about half involved empty containers crossing via BOTA and the other half involved loaded containers. This volume represented an increase compared with the same period in 2025, and the company anticipates additional growth during November and December, which representatives identified as its busiest retail period.



SECTOR

Retail Distribution & Cross-Border Logistics



TRADE FLOW

27,800 Truck Movements
(January-June 2026)



PRIMARY PORTS

Zaragoza 78% | BOTA 21% | Santa Teresa <1%

CROSSING

Multi-Port Distribution Strategy

- Uses three ports of entry based on product type and logistics needs.
- Zaragoza supports agricultural inspections and food shipments.
- BOTA supports empty trailer movements and non-food merchandise.
- Port selection is driven by warehouse location, inspections, and operating costs.

IMPACT

Retail Supply Chain Disruptions

- BOTA closure would shift additional traffic to Zaragoza, increasing congestion.
- Crossing times could increase by approximately 2 hours in each direction.
- Longer delays would increase fuel consumption, equipment wear, and refrigeration costs.
- Extended disruptions could affect inventory availability and store replenishment.

RECOMMENDATIONS

Improving Cross-Border Retail Reliability

- Maintain and expand BOTA commercial operations.
- Increase inspection capacity and improve border processing systems.
- Expand lane capacity to reduce congestion at high-volume crossings.



BOTA's reduced operating hours have significantly affected our logistics. Since it is the earliest port to close, shipments are redirected to Zaragoza after 4:00 p.m., increasing congestion. If BOTA remained open longer, we would rely on it much more for non-perishable cargo.

-S-Mart Executive



Border Operations

S-Mart distributes its cross-border traffic among three PoEs according to product type and warehouse location. Approximately 78% of its crossings use the Ysleta-Zaragoza PoE, 21% use BOTA, and a small share moves through the Santa Teresa land port, primarily for fish shipments. The company does not use Tornillo due to its distance from its distribution center.

The company's logistics model depends heavily on the daily movement of empty trailers. Company representatives reported that approximately 13,000 empty trucks crossed through BOTA during the first half of 2026 because the bridge is near several S-Mart suppliers' warehouses in central El Paso and provides toll-free access. These trailers return later the same day, loaded with merchandise destined for stores in Ciudad Juárez. The company regularly transports high-value shipments, including refrigerated poultry loads valued at approximately \$18,000 and milk shipments valued at around \$20,000 per load.

The company also differentiates ports based on inspection requirements. Products requiring Mexican agricultural inspections are routed through Zaragoza PoE, while BOTA is primarily used for non-regulated or non-food merchandise such as plastics, general merchandise, and store equipment.

Anticipated Operational Impacts

Company representatives indicated that closing BOTA would primarily affect operational efficiency rather than eliminating crossing capacity. Empty trailers currently routed through BOTA would likely be diverted to Zaragoza PoE, potentially increasing travel distances, congestion, equipment utilization, and operating costs.

The company estimates that average crossing times would increase by approximately 2 additional hours in each direction. According to company representatives, these additional delays could drastically reduce operational efficiency, increase diesel consumption, and risk the integrity of non-refrigerated products. Because approximately 95% of the company's refrigerated and regular fleet is company-owned, longer border delays could also accelerate equipment wear and increase fuel requirements to keep refrigeration units operating during extended waits.

Company representatives indicated that refrigerated products could remain safe as long as refrigeration systems continue operating. However, prolonged border delays increase operational risks by requiring continuous monitoring and additional fuel to maintain the equipment's temperature and capacity. Under exceptional circumstances, representatives reported that some trucks have experienced delays for up to two days, requiring repeated refueling to maintain product integrity.

Representatives also noted that Zaragoza PoE already experiences significant afternoon traffic congestion, particularly after 4:00 p.m. and on Fridays, when import volumes are highest in preparation for weekend demand. In the company's assessment, redirecting BOTA traffic to Zaragoza PoE could add volume and congestion during these periods and reduce scheduling flexibility.

The company also described previous border disruptions, including temporary bridge blockades, during which shipments were rerouted through more distant crossings. According to representatives, these events interrupted supplier deliveries and contributed to temporary product shortages. They expressed that under the BOTA closure scenario, these disruptions would become permanent, with implications for the supply chain and consumers in Ciudad Juárez. Based on these prior experiences, company representatives emphasized that similar disruptions following a permanent BOTA closure could affect inventory availability, even with advance purchasing and weekly transportation planning.

S-MART KEY FINDINGS

- The company processed approximately 27,800 cross-border truck crossings in the first half of 2026, exceeding the volume recorded in the same period in 2025.
- Company data shows approximately 21% of the company's cross-border operations currently rely on BOTA, primarily for empty-trailer repositioning and the import of non-food merchandise.
- Company representatives identified that approximately 13,000 empty trailer crossings used BOTA during the first 6 months of 2026 because of its proximity to warehouses in central El Paso and its toll-free access.
- According to the company, diverting BOTA traffic to Zaragoza PoE could increase crossing times, diesel consumption, equipment wear, and congestion at an already heavily utilized PoE.
- Company representatives estimate border delays could increase by approximately 2 hours in each direction following a BOTA closure.
- Representatives indicated that weekly system outages and limited inspection capacity already reduce operational efficiency, and additional traffic would likely compound these challenges.

TECMA TRANSPORTATION SERVICES (TTS)



Company Profile

Tecma Transportation Services (TTS) is the transportation and logistics division of the Tecma Group of Companies, providing cross-border freight services between the United States and Mexico. The company specializes in door-to-door transportation without transloading and offers import and export logistics, just-in-time deliveries, GPS shipment tracking, intermodal transportation, and specialized equipment services. TTS operates in Ciudad Juárez, El Paso, Santa Teresa, Tijuana, Monterrey, McAllen, and San Diego.



SECTOR

Cross-Border Transportation & Logistics



TRADE FLOW

2,600 Monthly Commercial Crossings



PRIMARY PORTS

Ysleta-Zaragoza | Santa Teresa
BOTA → Fleet Repositioning



BOTA is such a critical artery for cross-border trade that the greatest concern isn't the added cost; it's the time lost. As a buffer for historical continued trade growth in our region, we simply don't have the infrastructure to absorb that traffic elsewhere. Without that capacity, congestion increases, competitiveness declines, and companies begin looking to other gateways like Laredo, where crossings are faster, or Otay, which is expanding its capacity with a second port.

- Miriam B. Kotkowski
President

CROSSING

Multi-Port Logistics Network

- Each port serves a distinct role within the regional supply chain.
- BOTA supports empty trailer movements, local distribution, and smaller manufacturers.
- Santa Teresa supports specialized cargo, while Zaragoza serves larger manufacturing operations.

IMPACT

Regional Capacity & Cost Pressures

- BOTA closure would shift empty trailer movements to Santa Teresa and Zaragoza.
- Wait times could increase to 5–6 hours at Santa Teresa and 7+ hours at Zaragoza.
- Rerouted empty trailers could add approximately \$195,000 per month in operating costs.
- Freight rates could increase from \$350 to \$550 per movement.
- Longer delays would reduce driver productivity and impact just-in-time deliveries.

RECOMMENDATIONS

Maintaining Freight Network Flexibility

- Modernize BOTA while maintaining commercial operations during transition.
- Preserve capacity for empty trailer movements and FAST cargo.
- Expand alternative port capacity before implementing full commercial closures.

Border Operations

Tecma Transportation Services (TTS) manages approximately 2,600 commercial border crossings per month, including about 2,034 loaded import and export shipments. Approximately 34% of its crossings involve repositioning empty trailers, while nearly 40% of its operations support just-in-time deliveries. The value of the commodities transported varies significantly by industry, ranging from approximately \$5,000 to \$1.5 million per 53-foot trailer.

The company primarily uses the Ysleta-Zaragoza and Santa Teresa PoEs but relies on BOTA for a significant share of its empty-trailer movements due to its operational efficiency.

“A real crisis is looming; we aren't seeing it, yet we are scared. It is very disheartening because the situation is so closed off; we are told there is no way forward, and we don't know why, because there is a way. There is no need to shut down the commercial side.”

- Miriam B. Kotkowski
President

Anticipated Operational Impacts

TTS emphasized that each port of entry serves a distinct role within the regional supply chain. According to the company, BOTA has traditionally supported manufacturers located in plants near the port, local distribution centers, produce shipments, and empty trailer movements, while Santa Teresa specializes in oversized cargo and Ysleta primarily serves larger manufacturing operations.

The company believes closing BOTA to commercial traffic would eliminate an important outlet for empty trailer movements, forcing additional traffic to Santa Teresa and Ysleta. TTS estimates average crossing times could increase to 5 to 6 hours at Santa Teresa and more than 7 hours at Ysleta, reducing driver productivity and affecting just-in-time deliveries.

TTS estimates that rerouting empty trailers would increase operating costs by approximately \$195,000 per month. The company also projects freight rates could increase from approximately \$350 to \$550 per movement as longer wait times reduce equipment utilization and increase labor costs. Company representatives noted that driver wages are their largest operating expense and that increasing border delays would further reduce fleet productivity and raise the cost of serving manufacturers.

TECMA TRANSPORTATION SERVICES KEY FINDINGS

- TTS manages approximately 2,600 commercial crossings per month, supporting manufacturers across multiple industries with a strong emphasis on just-in-time deliveries.
- Approximately 34% of the company's border movements involve empty trailers, making BOTA a critical component of its fleet repositioning strategy.
- The company estimates that rerouting empty trailers following a BOTA closure would increase operating costs by approximately \$195,000 per month.
- TTS projects that average border wait times could increase to 5 to 6 hours at Santa Teresa and more than 7 hours at Ysleta, reducing driver productivity and equipment utilization.
- The company estimates freight costs could increase from approximately \$350 to \$550 per movement as congestion increases and fleet productivity declines.
- TTS supports modernizing BOTA but recommends maintaining commercial operations through a phased construction approach until sufficient capacity is available at alternative ports of entry.

TRANSPORTES PASO DEL NORTE



Company Profile

Transportes Paso del Norte is a Ciudad Juárez-based cross-border trucking company with more than 20 years of experience serving the manufacturing sector. The company performs approximately 200 northbound commercial crossings per month, in addition to 100 southbound movements, and specializes in transfer services for industrial cargo, including automotive components and other manufacturing inputs. According to its owner, José Francisco Cuautle, who also serves as president of the Coalition of Transport Companies, approximately 95% of the company's operations currently use the BOTA.



SECTOR

Transportation & Logistics



TRADE FLOW

200 Northbound | 100 Southbound
Monthly Crossings



PRIMARY PORT

BOTA



They gradually killed off BOTA by cutting back operating hours; they effectively forced it out of business. If we were given more operating hours, more trucks would cross. If we went back to a 12-hour schedule, we would see 1,100 crossings a day again.

- José Cuautle



CROSSING

Current Reliance on BOTA

- 95% of its shipments utilize BOTA.
- BOTA provides the most efficient route for manufacturers located in central Ciudad Juárez.

IMPACT

Operational Disruptions from Potential Closure

- Shipments would shift primarily to Ysleta-Zaragoza Port of Entry.
- Average crossing times could increase by 2–2.5 hours.
- Transfer costs could rise from \$300 to \$420–\$450 per shipment.
- Total wait times could reach 4.5–5 hours.

RECOMMENDATIONS

Improving Regional Freight Mobility

- Extend BOTA commercial operating hours to increase existing capacity.
- Increase customs staffing and inspection capacity.
- Reduce congestion pressures at neighboring PoEs.

Border Operations

The company primarily serves manufacturers located in the San Lorenzo industrial area of Ciudad Juárez, with distribution centers concentrated near the El Paso International Airport. According to company representatives, this geographic configuration through BOTA provides the shortest travel distance and the most efficient routing for the company's movements. Port selection is based on logistics considerations, including customer location, warehouse proximity, transit time, and transportation costs.

Cuautle indicated that BOTA's current operating schedule limits its effective capacity because the port processes 700-800 shipments daily during its available operating period, compared with approximately 1,100 daily shipments when it operated 12 hours a day. Since commercial processing ends at 2:00 p.m., manufacturers often avoid dispatching shipments after approximately 12:30 p.m. to minimize the risk of their cargo being selected for a secondary inspection and failing to cross the port due to time constraints. In the company's assessment, demand for the crossing exceeds the hours currently available for commercial operations.

Anticipated Operational Impacts

If BOTA were to close, the company representatives anticipate rerouting nearly all shipments through the Ysleta-Zaragoza PoE. According to the company, this change would increase travel distance by approximately 10 miles per trip while diverting additional commercial traffic to a crossing that already handles a substantial share of regional freight.

Cuautle anticipates that average crossing times at Zaragoza-Ysleta PoE could increase by approximately 2 to 2.5 hours if BOTA traffic is redistributed to that port. The additional travel distance and congestion could increase operating costs through higher fuel consumption, longer driver hours, and reduced operational efficiency. Based on current operations, the company estimates that the cost of a standard transfer could increase from approximately \$300 to \$420 and \$450 per shipment, and estimates an increase in total wait time of 4.5 to 5 hours.

Although the company expects to maintain service, longer transit times would reduce scheduling flexibility and increase the risk of delivery delays for customers requiring same-day cross-border movements.

TRANSPORTES PASO DEL NORTE KEY TAKEAWAYS

- According to the company, BOTA's current reduced commercial hours already constrain capacity, limiting the number of daily shipments that can be processed and affecting shipment scheduling.
- Company representatives said that if BOTA were closed, the company expects to reroute nearly all freight they move through the Ysleta-Zaragoza PoE, increasing travel distance, crossing times, and operating costs.
- Company representatives estimate that rerouting could increase transfer costs from approximately \$300 to between \$420 and \$450 per shipment, while total wait times could rise to approximately 4.5 to 5 hours.
- The company expects that longer transit times would reduce scheduling flexibility and increase the likelihood of delivery delays for manufacturers that rely on same-day cross-border shipments.
- Company representatives noted that extending BOTA's commercial operating hours and increasing customs staffing could improve regional freight mobility by making better use of existing infrastructure and reducing pressure on alternative ports of entry.

ROLANDO PABLOS / CROSS-NATIONAL ADVISORY PARTNERS

Profile

Rolando Pablos is the former Texas Secretary of State. He previously chaired the Texas Department of Transportation's Border Trade Advisory Committee and served on the Borderplex Alliance. Currently, Pablos is the CEO of Cross-National Advisory Partners, an advisory firm focused on assisting governmental, private sector, and non-profit organizations through domestic and international market entry and expansion.



SECTOR

Public Policy & Economic Development



EXPERTISE

Border Trade & Transportation Policy



BOTA ROLE

Maintain Commercial Capacity
Until Alternatives Are Ready



We're seeing a lot of growth in Laredo, in Eagle Pass, in Brownsville, the Rio Grande Valley, and they're responding to that growth by increasing their crossing capacity and land border entries. And here in El Paso, we're looking now to eliminate a tremendous amount of capacity.

- Rolando Pablos
Former Texas Secretary of State



CROSSING

Regional Freight Capacity

- *Commercial capacity should be maintained until sufficient capacity exists at alternative ports.*
- *Infrastructure planning should preserve the region's manufacturing and logistics advantages.*

IMPACT

Long-Term Economic Competitiveness

- *Reduced commercial capacity could increase congestion and transit times.*
- *Slower border crossings may influence future manufacturing investment decisions.*
- *Competing border regions could become more attractive if freight reliability declines.*

RECOMMENDATIONS

Data-Driven Infrastructure Planning

- *Conduct additional economic impact and traffic studies before major operational changes.*
- *Coordinate infrastructure planning across federal, state, local, and binational partners.*
- *Expand the use of technology to improve inspection efficiency without reducing commercial capacity.*

Anticipated Operational Impacts

Pablos attributes the possible elimination of commercial operations at BOTA to changes in freight routing and notes that it could affect the region's long-term economic competitiveness. He argued that manufacturers considering new investments evaluate both infrastructure capacity and the reliability of cross-border logistics. According to Pablos, reducing commercial crossing capacity without corresponding investments elsewhere could increase congestion, lengthen transit times, and make competing border regions more attractive for future investment. In his assessment, Pablos noted that the region's long-established manufacturing base and logistics network remain significant competitive advantages that should be preserved through infrastructure planning.

He also emphasized that successful border infrastructure projects require coordinated planning between federal, state, and local governments on both sides of the border. Pablos stated that additional economic impact and traffic studies should be completed before major operational changes are implemented and argued that infrastructure decisions should be supported by binational coordination. He also expressed support for greater use of technology to improve inspection efficiency, suggesting that existing inspection capacity could be enhanced to facilitate freight movement without reducing commercial crossing capacity.

If companies are looking to establish themselves, they're not going to want to invest in a region that is losing capacity for moving goods back and forth. They're going to go where local communities have made an effort to facilitate the flow rather than hamper it.

- Rolando Pablos
Former Texas Secretary of State

ROLANDO PABLOS KEY TAKEAWAYS

- Pablos considers that maintaining commercial capacity at BOTA is important to the region's competitiveness as a manufacturing and logistics hub, as alternative PoEs are not yet prepared to absorb the commercial traffic currently handled by BOTA.
- In his experience, he noted that border efficiency is a key factor companies consider when making manufacturing investment decisions.
- Pablos believes that additional economic impact and traffic studies should be completed before major operational changes are implemented, while infrastructure decisions should be coordinated with federal, state, and local authorities on both sides of the border.
- Pablos supports a greater use of technology because existing inspection capacity could improve freight movement without reducing commercial crossings.
- Pablos considers that the region's long history in manufacturing and its established logistics network remain important advantages for attracting future investment.

W SILVER RECYCLING

Company Profile

W Silver Recycling is a reverse logistics and byproducts management company that supports manufacturers by collecting, processing, and preparing production byproducts for reuse in industrial supply chains. The company operates at manufacturing facilities throughout the U.S.-Mexico border, including the Paso del Norte region. In this region, W Silver Recycling has a 60-acre processing facility in Santa Teresa, NM, a legacy processing site in downtown El Paso, and its corporate headquarters in El Paso, which provides administrative support for operations across multiple locations.

The company grades, sorts, processes, and aggregates industrial byproducts, including steel, aluminum, copper, and brass, and prepares them to customer specifications before shipping them by rail, truck, or overseas container to consumers throughout North America and international markets. Company representatives said that approximately 95.5% of the company's business depends on cross-border trade, positioning efficient border operations as a key component of its business model.



SECTOR

Reverse Logistics & Industrial Recycling



CROSS-BORDER DEPENDENCE

95.5% of Business Relies on
Cross-Border Trade



PRIMARY PORTS

Santa Teresa | Ysleta-Zaragoza



For us, as a reverse logistics firm, being in Santa Teresa, other people's pain is gonna become a hard opportunity. So, it's bad for the region, and we view it that way. A shrinking pie, even if we get more of it, is not good.

-W Silver executives



CROSSING

Supporting Regional Manufacturing

- *Located along the U.S.-Mexico border to serve the manufacturing sector.*
- *Reverse logistics operations depend on reliable regional freight movement.*
- *BOTA provides critical network capacity, even when not directly used.*

IMPACT

Reduced Regional Competitiveness

- *Freight would shift primarily to Zaragoza and Santa Teresa, increasing congestion.*
- *Longer transit times could range from several hours to multiple days during severe congestion.*
- *Border delays could contribute to equipment shortages, cargo theft, and operational disruptions.*
- *Reduced border efficiency could discourage future manufacturing investment.*

RECOMMENDATIONS

Strengthening Regional Freight Capacity

- *Preserve commercial capacity across all ports of entry.*
- *Expand regional crossing infrastructure rather than redistributing existing traffic.*
- *Improve operational resiliency to support long-term manufacturing growth.*

Border Operations

W Silver Recycling supports manufacturers through reverse logistics by collecting, processing, and preparing industrial byproducts for reuse as raw materials in future production.

The company located its operations along the U.S.-Mexico border to support manufacturing growth under NAFTA and the USMCA. Company representatives said that while relatively little of its own freight currently passes through BOTA, the port plays an important role in maintaining regional freight distribution and supporting the overall competitiveness of the Paso del Norte manufacturing cluster. They added that if BOTA were closed to commercial traffic, the company expects most freight to shift toward the Zaragoza and Santa Teresa PoEs.

“Not much of our products crosses the Bridge of the Americas, but for the region and to support broader manufacturing, it will take away an essential artery. It's going to make El Paso much less important and less competitive with other border cities where there's easy ingress and egress.”

-W Silver Executives

Anticipated Operational Impacts

Although W Silver Recycling does not rely heavily on BOTA for its own crossings, the company forecasts the closure would have significant indirect effects throughout the regional manufacturing ecosystem. According to company representatives, removing one of the region's principal commercial crossings would concentrate traffic at the remaining PoEs, which could increase congestion, reduce operational flexibility, and create additional uncertainty for manufacturers and logistics providers.

The company noted that longer transit times are difficult to quantify because delays would accumulate across multiple points, including urban traffic, inspection checkpoints, and congestion at alternative crossings. Company representatives said that under severe congestion, delays could extend from several hours to multiple days, particularly when trucks are unable to complete crossings before ports close and must return the following day, as previously observed under several contingencies.

Based on previous border disruptions, W Silver Recycling stated that prolonged delays can lead to equipment shortages as trailers, containers, and collection bins become trapped in border queues, making it difficult to sustain continuous manufacturing operations. The company also observed that prior border disruptions led to cargo theft, equipment losses, and operational disruptions affecting manufacturers throughout the region.

Beyond operational impacts, the company emphasized that increased wait times could reduce cargo security by forcing trucks to spend longer periods parked or traveling through less secure areas. Driver safety could also be affected if extended delays require drivers to remain idle for long periods before resuming travel.

While the company's Santa Teresa operations could potentially receive additional business if freight shifts away from central El Paso, W Silver Recycling expressed this as a regional loss rather than a competitive advantage. Company representatives indicated that redistributing freight among existing crossings does not offset the broader economic effects of reduced regional competitiveness or slower manufacturing growth.

W SILVER RECYCLING KEY TAKEAWAYS

- W Silver Recycling said it depends on cross-border trade for approximately 95.5% of its business.
- The company views BOTA as an important component of the region's freight network, even though most of its own shipments use other PoEs.
- According to company representatives, closing BOTA is expected to increase congestion at the Zaragoza and Santa Teresa PoEs, resulting in longer transit times and reduced operational flexibility.
- Company representatives said that previous border disruptions demonstrated how prolonged delays can lead to equipment shortages, cargo theft, and interruptions to manufacturing operations.
- The company noted that reduced border efficiency could weaken the competitiveness of the Paso del Norte manufacturing region when compared with other border communities.
- Although some freight could shift toward Santa Teresa, the company considers the overall regional impact to be a net negative because slower logistics may discourage future manufacturing investment.
- W Silver Recycling stated that long-term competitiveness depends on expanding regional crossing capacity rather than redistributing existing commercial traffic.

XII. STAKEHOLDER-PROPOSED ALTERNATIVES AND RECOMMENDATIONS

This series of interviews details the opinions of 11 stakeholders, varying in scale and sensitivity to the anticipated cessation of commercial cargo operations at BOTA. Through interviews, the Hunt Institute assessed the anticipated impacts, if any, on segments of the regional manufacturing, transportation, staffing, governmental, and food-retail sectors. Several consensus positions emerged consistently across these engagements.

The most common proposal, voiced by Border Trucking Compliance, Economy Wholesale Grocers, and Longhorn Warehouse, among others, called for a reversal of the current course: rather than eliminating commercial traffic from BOTA, these stakeholders advocated for its preservation, extended hours of operation, increased commercial staffing, and improvements to inspection systems to reduce cross-border wait times. Longhorn Warehouse, whose exports consist of 85% American meat products, noted that its recent \$30 million investment in a new facility near BOTA would likely be expanded were this proposal adopted.

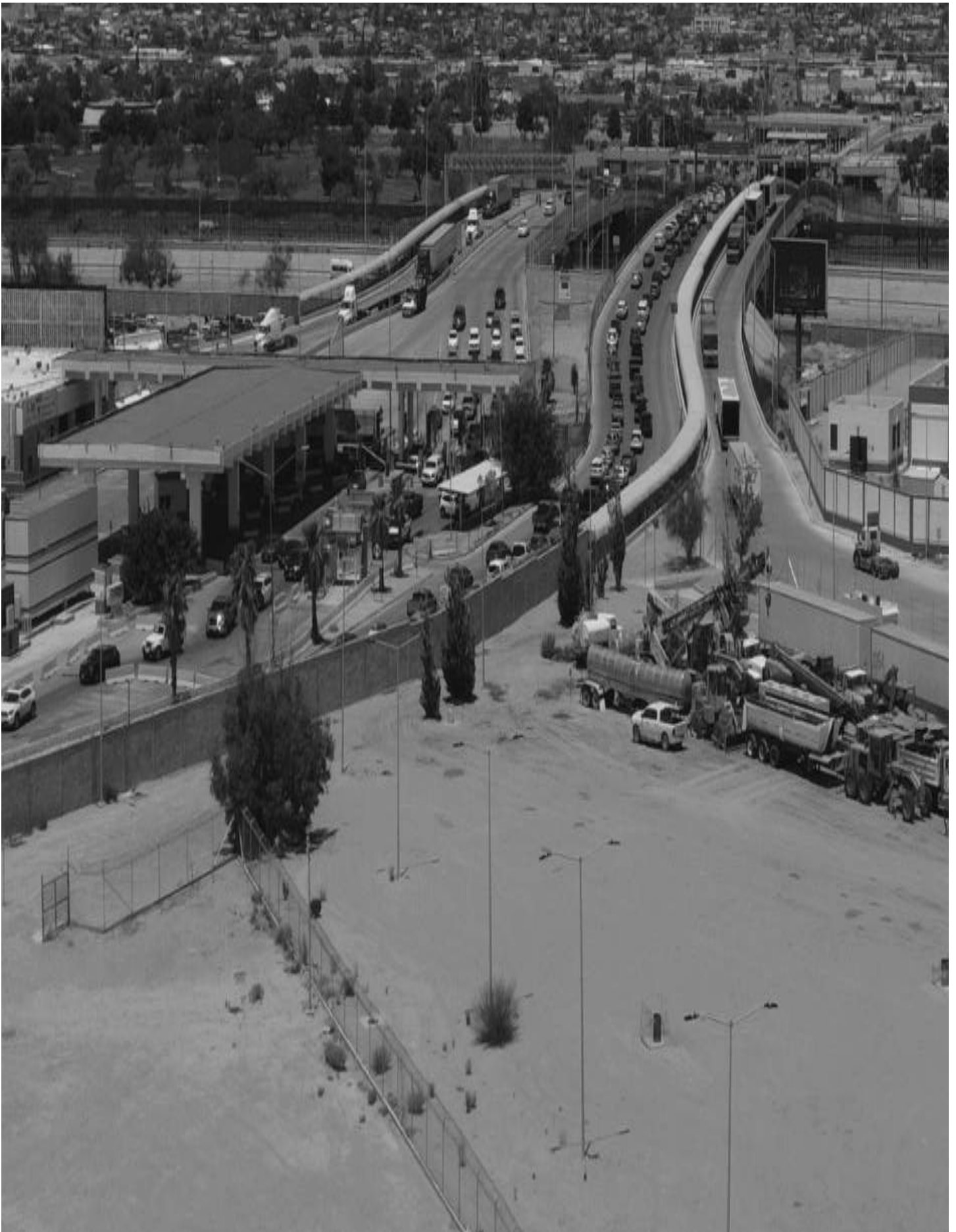
Relatedly, other firms such as W Silver Recycling emphasized a need for greater regional capacity, whether at BOTA or elsewhere, through a coordinated strategy that balances freight traffic needs across the Paso del Norte's PoEs. This could be achieved through the expansion of existing PoEs, such as Ysleta-Zaragoza, or the establishment of an entirely new one. Fletes Sotelo proposed a related avenue for expansion, advocating for extending weekend commercial hours comparable to those seen in other manufacturing hubs along the southern border, such as Laredo.

Tecma Transportation Services, while supportive of maintaining and expanding current operations at BOTA, also proposed a staggered approach to modernization — a compromise in which the port would remain open to commercial traffic for several more years while regional infrastructure catches up to anticipated commercial needs. This would require improvements to existing PoEs, the establishment of an entirely new one, or both. Once regional infrastructure has been built out to accommodate the anticipated loss of commercial trucking capacity, BOTA could then be converted into a PoE serving passenger vehicles and empty trailers exclusively. This approach would give the regional industry enough time to restructure its operations at a lower expected cost.

A further proposed solution was to preserve commercial traffic at BOTA for specific types of shipments. This entailed limiting BOTA to FAST cargo and empty trailers, thereby preserving its primary role as a toll-free outlet for trucks without cargo that need to cross quickly in support of the region's just-in-time manufacturing system. S-Mart, a Mexican supermarket chain, recorded 13,000 empty truck trips through BOTA in the first half of 2026 to facilitate the export of American food goods, including dairy, poultry, and meat, for sale in its stores. Border Trucking Compliance is another firm that could benefit from this solution, noting that 90% of its 2,000 monthly empty truck trips are routed through BOTA.

Ultimately, industry participants perceive the planned modernization of BOTA as detrimental to the viability of current commercial operations and as a negative signal for the region's economic prospects. Interviewees frequently cited the success of other land ports and the regional political cooperation underlying them, pointing to Laredo in Texas and Otay Mesa in California as examples. They emphasized that cross-border trade is a cornerstone of the Paso del Norte region that has been taken for granted in recent decades

Participants in the above stakeholder interviews self-identified their interest by indicating so on the survey form distributed as part of this study. As such, the interviews included reflect the individual perspectives and experiences of the participants themselves, and do not represent the official positions or views of the Hunt Institute for Global Competitiveness.



Bridge of the Americas PoE located in El Paso, Texas

X. CONCLUSION

The proposed modernization of the Bridge of the Americas (BOTA) involves two economically distinct changes: a substantial infrastructure investment and the permanent cessation of commercial cargo operations at BOTA. Construction expenditures are expected to generate economic activity during the 2028-2031 construction period, while the elimination of commercial cargo operations would redistribute freight currently processed through BOTA across the broader regional port of entry network. The economic implications of these changes, therefore, differ in both their timing and the channels through which they affect economic activity. Evaluating these implications requires considering the economic gains from construction and additional noncommercial crossings, alongside the commercial traffic leakage, freight redistribution, and forgone truck trade associated with the cessation of commercial operations.

The net economic impact assessment for El Paso County evaluates three economic components within a common analytical framework: economic gains associated with construction, economic gains associated with additional noncommercial crossings, and economic losses associated with forgone truck trade. Each component is evaluated separately before being considered together to estimate the net economic impact over the 2028-2036 study period.⁴⁶

The first component captures economic gains associated with the construction of the BOTA modernization project. GSA estimates construction costs to range from \$400 million to \$460 million. For purposes of the economic impact analysis, the Hunt Institute used the midpoint of this range, \$430 million, and assumed that construction expenditures would be evenly distributed over the four-year construction period. Based on these assumptions, the Hunt Institute's economic impact analysis estimates that construction in El Paso County would support 3,112 job-years, \$202.9 million in labor income, \$616.8 million in economic output, and \$1.8 million in taxes. These economic gains are associated with construction expenditures and the resulting direct, indirect, and induced economic activity generated during the project's implementation.

The second component captures potential economic gains associated with additional noncommercial crossings. Available El Paso MPO estimates did not identify an increase in noncommercial crossings attributable to the modernization and therefore did not provide a basis for estimating these economic gains. Given this data limitation, the Institute relied on the framework and results developed by GSA to incorporate potential economic gains associated with additional noncommercial crossings into the net economic impact assessment. Using these estimates, the analysis incorporates 4,014 job-years, \$128.1 million in labor income, and \$514.4 million in economic output in El Paso County over the 2028-2036 study period.

The third component evaluates economic losses associated with forgone truck trade resulting from the cessation of commercial cargo operations at BOTA. The commercial-traffic analysis compares projected conditions under continued commercial operations at BOTA with projected conditions following the cessation of commercial operations. The analysis incorporates projected growth in commercial crossings and truck trade, estimated annual commercial processing capacity at the regional PoEs, traffic leakage, and the redistribution of commercial traffic among the remaining crossings. Under the modeled cessation scenario, the analysis estimates a 10.9% regional leakage rate. Of the commercial traffic projected to remain within the Paso del Norte region, approximately 64.3% would be redistributed to Ysleta-Zaragoza, 34.4% to Santa Teresa, and 1.3% to Tornillo-Guadalupe. As projected commercial crossings increase over the study period, the analysis also accounts for additional crossings that could not be accommodated once the estimated processing capacity of the remaining regional PoEs is reached. These forgone commercial crossings provide the basis for estimating the corresponding forgone truck trade value, which is then used to assess the economic losses associated with the cessation of commercial cargo operations at BOTA.

⁴⁶ The construction impact results remain unchanged regardless of whether the analysis period is presented as 2028-2031 or 2028-2036.



Bridge of the Americas PoE located in El Paso, Texas

Under the modeled scenario, forgone truck trade in El Paso County is estimated to reach approximately \$36.6 billion in 2036 alone. The corresponding economic impact analysis estimates losses of 16,655 job-years, \$931.8 million in labor income, \$3.5 billion in economic output, and \$9.7 million in taxes in El Paso County over the 2028-2036 study period.

The geographic scope of the analysis is important when interpreting these estimates. Because the net economic impact assessment focuses on El Paso County, commercial activity projected to shift to Santa Teresa is excluded from the final forgone truck trade estimates for the county. Within the modeled redistribution of BOTA commercial traffic, approximately \$19.8 billion in truck trade is estimated to shift to the Santa Teresa PoE over the 2028-2036 period.

When the economic gains associated with construction and additional noncommercial crossings are considered together with the economic losses associated with forgone truck trade, the estimated economic losses exceed the estimated economic gains over the 2028-2036 study period. The analysis estimates net economic losses in El Paso County of 9,529 job-years, \$600.7 million in labor income, \$2.3 billion in economic output, and \$7.9 million in El Paso County tax revenue.⁴⁷

The timing of these economic gains and economic losses is important when interpreting the net results. Economic gains associated with construction are temporary and concentrated within the 2028-2031 construction period. In contrast, the economic gains associated with additional noncommercial crossings and the modeled economic losses associated with forgone truck trade are permanent and extend beyond project completion. Under the assumptions applied in this study, the longer-term economic losses associated with the cessation of commercial operations at BOTA, including the effects of regional leakage, freight redistribution, and regional commercial processing constraints, exceed the quantified economic gains associated with construction and additional noncommercial crossings over the 2028-2036 study period.⁴⁸

Separate from the net economic impact assessment, the logistics-cost analysis estimates additional operational effects for firms engaged in cross-border trade. By comparing estimated logistics costs under continued commercial operations at BOTA with estimated costs under the commercial-traffic cessation scenario, annual logistics costs across the Paso del Norte region are estimated to increase by approximately \$79.1 million, or 17.8%, in constant 2025 dollars.

⁴⁷ Tax implications are reported where supported by the available analysis.

⁴⁸ These estimates are presented for the 2028-2036 period. The GSA annual average estimates associated with additional noncommercial crossings (446 jobs, \$14.2 million in labor income, and \$57.2 million in output) are assumed to continue in perpetuity beyond 2036. For simplicity, nominal values were not adjusted for inflation.

Survey findings provide additional evidence of how participating businesses anticipate responding to the cessation of commercial operations at BOTA. Most surveyed firms reported that they would reroute more than 75% of their cargo through the Ysleta-Zaragoza PoE. Among participating businesses directly connected to cross-border trade, 11.8% reported that they would consider relocating following the cessation of commercial traffic at BOTA, a proportion that closely aligns with the estimated 10.9% regional leakage rate.⁴⁹

The follow-up interviews and case studies provide firm- and industry-level context for these quantitative findings by identifying potential changes in routing, crossing times, transportation costs, equipment utilization, staffing, customer relationships, and supply-chain decisions, among others. The stakeholder perspectives and proposed alternatives presented in Section IX reflect the experiences and expectations of participating stakeholders and do not represent the position of the Hunt Institute. When considered alongside the trade, port of entry, economic impact, logistics cost, and survey analyses, these perspectives provide additional context for understanding how the modernization could affect businesses and cross-border operations within the Paso del Norte region.

Taken together, the findings indicate that the economic implications of BOTA modernization differ in timing, geographic distribution, and duration. The analysis identifies economic gains associated with construction and additional noncommercial crossings and economic losses associated with forgone truck trade, while the separate logistics-cost, survey, and case-study analyses provide additional evidence regarding potential firm- and regional-level operational effects. Under the assumptions applied in this study, the modeled longer-term economic losses exceed the quantified economic gains over the 2028-2036 study period.⁵⁰

⁴⁹ The similarity between these values provides complementary context but should not be interpreted as establishing a causal relationship or independently validating the modeled leakage estimate.

⁵⁰ These findings do not constitute an evaluation of the policy merits of the proposed modernization, an assessment of its environmental or engineering merits, or a recommendation regarding the selected GSA alternative. Rather, this report provides a factual, neutral, and scenario-based assessment of the potential economic and trade-related effects associated with the modernization. By evaluating these effects within a common analytical framework and supplementing the quantitative findings with logistics-cost estimates, survey responses, and firm-level perspectives, the analysis is intended to provide decision-makers, businesses, stakeholders, and the public with additional information for understanding the proposed modernization within the broader economic and transportation context of El Paso County and the Paso del Norte region.

XI. ASSUMPTIONS AND LIMITATIONS



Bridge of the Americas PoE located in El Paso, Texas

This report estimated the net economic impact associated with BOTAs modernization, considering the economic effects of the project's construction phase, the cessation of commercial traffic, and the additional noncommercial traffic that may follow. The net economic impact was estimated using IMPLAN. The inclusion of intersectoral linkages and economic multipliers in IMPLAN software allows the impact of spending shocks to spread throughout the regional economy. While these features allow users to analyze the impact of spending shocks across multiple sectors, the analysis relies on assumptions and has limitations such as linear proportions and constant prices. Another important limitation of the net impact analysis is that the data used also relied on assumptions and projections.

The net economic impact analysis was conducted for the 2028-2036 period assuming that no additional commercial lanes are constructed or brought into operation, given that the planning, approval, and construction of new PoEs have been shown to take over ten years. The analysis does not consider policies or changes in the use of regional ports of entry that may occur during the study period.

For the estimation of the economic impact of the construction phase of BOTAs modernization, GSA provides a range of \$400 million to \$460 million for the construction budget. The Hunt Institute assumed the construction costs equal the midpoint of GSA's estimated construction costs, \$430 million, with these costs evenly spread over the four-year period.

The Hunt Institute estimated the possible forgone value of truck trade in El Paso County for the study period to assess the economic impact of BOTAs modernization. Limitations of the analysis include a lack of official capacity numbers for PoEs and reliance on projections for future commercial crossings, as well as on value-per-truck, truck-trade, and price-deflator data.

This report also relies on estimates of possible regional leakage rates under the scenario of BOTAs cessation of commercial traffic, as no such estimate exists from other entities. In the estimation, data was compared and accounted for possible seasonality and year-over-year variation. For the final analysis, the Institute used a medium-scenario leakage rate. This leakage rate was further supported by survey findings, as the percentage of firms considering relocating to areas outside the Paso del Norte region was similar to this estimated leakage rate.

Additional assumptions were required in estimating the forgone truck trade values, as historical southbound commercial crossings at the regional PoEs were available only for the Ysleta PoE. A comparison of northbound and southbound commercial crossings at the Ysleta PoE showed similar growth patterns and crossing volumes, while the El Paso MPO also relied on northbound commercial crossing patterns to represent southbound activity in a comparable analysis. Therefore, regional northbound and southbound truck crossings were assumed to be equivalent and to follow the same growth rate, implying that the estimated share of forgone truck imports was also applicable to truck exports. The net economic impact analysis of this report focuses on El Paso County, Texas. The Santa Teresa PoE, located in New Mexico, was included in the redistribution analysis under Scenario 1 because, despite being located outside El Paso County, it is part of the Paso del Norte regional commercial crossing network and represents a viable alternative for regional commercial truck traffic. However, because the economic impact analysis focuses on El Paso County, Texas, commercial activity projected to be redistributed to the Santa Teresa PoE was excluded from the final forgone value estimates.

For the estimation of the additional noncommercial traffic's economic impact associated with BOTA'S modernization, it is assumed that northbound noncommercial crossers stimulate economic activity in the region through their local spending. Estimating these gains requires projections of the additional noncommercial crossings under the current scenario and the scenario of BOTA's modernization. Although the Hunt Institute was able to develop these projections under the current scenario, the available data were insufficient to independently project the additional crossings associated with BOTA's modernization. Available data from the MPO estimates for noncommercial traffic with BOTA's modernization yielded no economic gains, as crossing estimates remained unchanged under both scenarios. To account for potential economic gains following modernization, the Institute applied the results presented in GSA's independent report.

For this report, surveys were distributed to regional firms (operations that rely on cross-border dynamics) and businesses (operations that do not rely on cross-border dynamics) to assess their current dynamics and expectations regarding the BOTA modernization for their operations. These surveys were distributed at different regional events, and these results may not be representative of the entire region's firms and businesses.

The interviews used in this report were self-selected and may not be representative of the entire region. The survey's final question asked respondents for additional comments and whether they wished to be interviewed for case studies; if so, the Institute conducted the interviews. The interviews were used to draft the Firm Case Studies and the Stakeholder Perspectives section of this report.

A logistics cost analysis was estimated based on the expected changes in logistics costs reported by the interviewed firms under the scenario of BOTA's cessation of commercial traffic. Using the logistics cost breakdown and projections provided by one of the region's main firms for monthly crossing volume, the region's annual logistics costs were estimated. The firm's data was chosen given the similarity to other interviewees' results and the breakdown of the data provided by this specific firm.

XII. GLOSSARY AND ACRONYMS

GLOSSARY

Blockade: A temporary obstruction or restriction that prevents or limits the movement of vehicles, goods, or people through a border land port.

Border City Pairs: Neighboring urban areas located directly across an international boundary from one another that share close economic, social, and cultural ties.

Capital Goods: In trade statistics, capital goods generally represent imports or exports used for business investment and production rather than direct consumption.

Cessation/Cease: The discontinuation or termination of an activity or operation. In this report, it refers to the ending of commercial cargo operations at a BOTA Port of Entry.

Commercial Crossings: The movement of commercial trucks carrying goods or commodities across an international border through a designated Port of Entry.

Commodity: Products that an establishment produces, sells, or distributes.

Convergence: The process by which less advanced economies with lower-income per capita converge towards more advanced economies through higher growth rates.

Cross-Border Industrial Linkages: Economic and production connections between firms and industries located in different countries, through which goods, intermediate inputs, services, technology, knowledge, and investment move across borders as part of integrated supply chains and production networks.

Disruption: The action of preventing something, especially a system, process, or event, from continuing as usual or as expected.

Border Disruptions: Events or situations that temporarily interrupt, delay, or block the normal movement of people, vehicles, and goods across an international border or port of entry.

Exponential Smoothing Models: Time-series forecasting methods that generate predictions by calculating weighted averages of past observations, with weights that decrease exponentially as observations become older. These models can account for different components of a time series, including level, trend, and seasonality.

Forecast: An estimate or projection of future economic conditions, trends, or outcomes based on historical data, current information, and specified assumptions.

Forgone Value: The estimated value of economic activity, trade, revenue, or other benefits that would have occurred under a baseline scenario but is not realized due to a change in operations, policy, or capacity.

Freight: Goods or commodities transported for commercial purposes. In this report, freight refers specifically to goods transported by commercial trucks across the U.S.–Mexico border.

Freight Rate: The cost charged by a carrier to transport goods from one location to another, typically based on distance, shipment weight or volume, and market conditions. In this report, freight rates refer specifically to the cost of transporting goods by commercial truck.

Hazmat: A material (such as flammable or poisonous material) that would be a danger to life or to the environment if released without precautions.

Human Capital: The skills, knowledge, and qualifications of a person, group, or workforce considered as economic assets.

Inflation-Adjusted: A monetary value adjusted to remove the effects of inflation, allowing values from different periods to be compared in constant dollars.

Input-Output (I-O) Model: An economic modeling framework that measures the relationships among industries, households, and government through the purchase and sale of goods and services. In this report, the IMPLAN I-O model is used to estimate how changes in economic activity generate direct, indirect, and induced impacts throughout the regional economy.

Intermediate Goods: Goods or components used as inputs in the production of other goods rather than for final consumption. In this report, intermediate goods refer to materials, parts, and components transported by truck across the border to support manufacturing and production activities.

Intersectoral Linkage: The economic relationships among industries that describe how changes in one industry can generate additional economic effects across other industries within the regional economy, as modeled in the IMPLAN platform

Intra-Industry Trade: Two-way trade in similar or related products within the same industry classification, where goods from the same industry are both imported and exported between trading partners.

Job-Years: A unit of measurement equal to one full-time job lasting for the duration of a calendar year.

Landlocked: A country that has no territorial access to the sea.

Laredo PoE: A major U.S.–Mexico border gateway in the Laredo region, Texas, that facilitates commercial freight movement. In this report, the Laredo PoE refers specifically to truck crossings through the Colombia Solidarity Bridge and World Trade Bridge.

Leakage Rate: The estimated share of commercial truck crossings that would not be redistributed to other Ports of Entry within the Paso del Norte region following the discontinuation of commercial operations at BOTA.

Logistics: The process of coordinating and optimizing the movement of goods from one place to another, typically involving multiple transportation modes (e.g., land, air, maritime transport) and various logistical considerations.

Maquiladora: A foreign-owned factory in Mexico that imports raw materials or components duty-free, assembles or processes them, and exports the finished products back to the home country. These companies are eligible for tax breaks.

Noncommercial Crossings: Cross-border movements of people through a Port of Entry (PoE) by private vehicle, bus, train, or on foot. In this report, noncommercial crossings include private vehicle passengers, bus passengers, and pedestrians.

Northbound Crossings: Cross-border movements of private vehicles, commercial cargo, and pedestrians traveling from Mexico into the United States through a designated Port of Entry.

Operational Constraints: Any practice, event, process, or occurrence resulting in suboptimal throughput and inefficient operation of the freight transportation system.

Perishable: For the purpose of this report, perishable is a food that can spoil or grow harmful bacteria when not properly stored in the refrigerator or freezer.

Phytosanitary: Of, relating to, or being measures for the control of plant diseases, especially in agricultural crops.

Protectionism: The actions of a government to help its country's trade or industry by taxing goods bought from other countries.

Regional Supply Chains: A network of suppliers and vendors located in a specific geographic area or region. In this report, regional supply chains refer primarily to the cross-border movement of raw materials, intermediate goods, and finished products between the United States and Mexico within the Paso del Norte region.

Southbound Crossings: Cross-border movements of private vehicles, commercial cargo, and pedestrians traveling from the United States into Mexico through a designated Port of Entry.

Supply Chains: The chain of processes, businesses, etc. by which a commodity is produced and distributed.

Tariff Breaks: An official government policy that reduces or eliminates the tax (tariff) on specific imported goods.

Total Factor Productivity (TFP): An economic measure of how efficiently an economy or business turns inputs into outputs.

Trade Liberalization: The process of reducing or removing restrictions on international trade. This may include the reduction or removal of tariffs, abolition or enlargement of import quotas, abolition of multiple exchange rates, and removal of requirements for administrative permits for imports or allocations of foreign exchange, or at least simplification of the process of applying for them.

2025 dollars: Monetary value adjusted for inflation using the year 2025 as a base.

ACRONYMS

BASC: Business Alliance for Secure Commerce

BOTA: Bridge of the Americas

CBP: U.S. Customs and Border Protection

C-TPAT: Customs Trade Partnership Against Terrorism

GDP: Gross Domestic Product

NAFTA: North American Free Trade Agreement

NEEC: Nuevo Esquema de Empresas Certificadas

NEPA: National Environmental Policy Act

PoE: Port of Entry

SADER: Secretariat of Agriculture and Rural Development

USMCA: United States–Mexico–Canada Agreement