

Food security in North America

The interdependence of agribusiness markets in North America

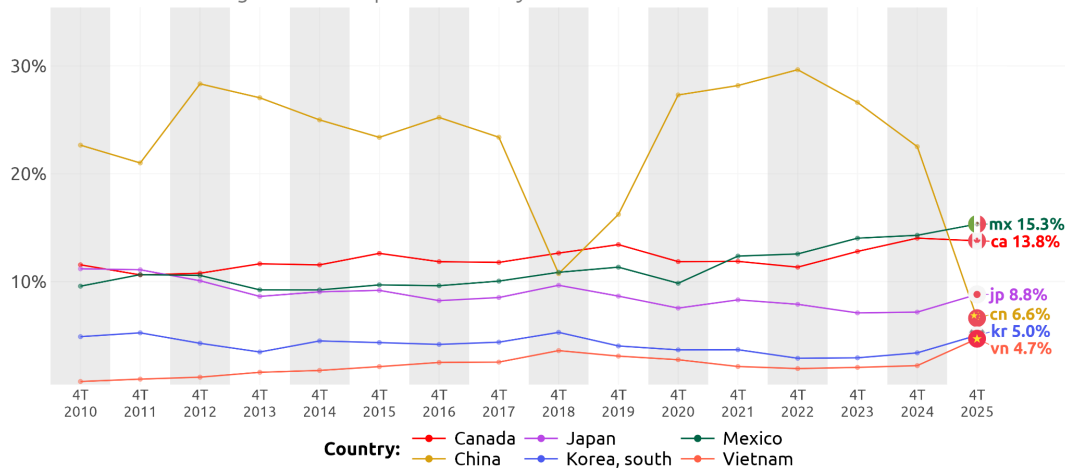
Agro-industrial trade in North America, facilitated by the USMCA, plays a key role in the region's food security

The U.S. relies on its USMCA partners for agricultural imports more than other countries outside the region.

- **Mexico and Canada are the main U.S. agro-industrial trading partners, both in exports and imports**, highlighting the complementarity of agricultural products in the three countries.
 - The share of U.S. agricultural imports from **Mexico and Canada** is 2.5 times the **combined value of imports from Italy, Brazil, France, Ireland, and China**.
- This relationship has become even more relevant following the reconfiguration of U.S. export markets as part of strategies to reduce its dependence on China.
 - China's share of U.S. agricultural exports fell sharply from nearly 30% in 2022 to just 6.6% in 2025.

Share of U.S. exports

NAICS 11, Agriculture and livestock products
Data accumulated through the fourth quarter of each year



Prepared by México, ¿Cómo vamos? with information from census.gov (U.S.)

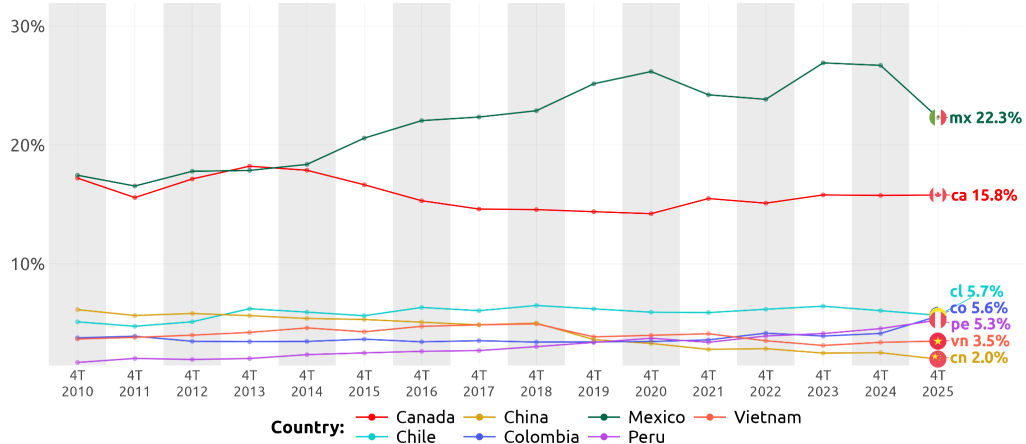
Mexico has been the United States' leading agricultural supplier since 2014.

- In 2025, **Mexico accounted for 22.3% of U.S. agricultural imports** and was the **destination for 15.3% of U.S. agricultural exports** (U.S. Census Bureau).

- Between 2019 and 2024, Mexico's agricultural exports to the U.S. grew at a faster pace than U.S. agricultural exports to Mexico, highlighting the resilience of this trade relationship in the post-pandemic period (USDA).
- **Mexico's agroindustry is globally competitive:** agricultural exports are the country's second largest export category after manufacturing (BBVA).

Share of U.S. imports

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Agricultural trade in the USMCA region

- **U.S. exports to Mexico include:** grains, oilseeds, and meat.
 - **Mexico has been increasingly dependent on importing corn**, especially yellow corn, to meet the rising demand from its livestock and starch industries (USDA).
 - **U.S. exports to Canada include fresh fruits and vegetables, processed products, and pork.**
- **Mexico exports to the U.S. and Canada:** fresh vegetables and fruits such as avocados, tomatoes, and berries (USDA). It also exports beverages and distilled spirits, such as beer, tequila, and mezcal, which not only boost agricultural trade but also reinforce culinary integration in the region.
- **Canada exports to the U.S. and Mexico:** grains such as wheat and canola, in addition to meat and dairy products, strengthening North American agro-industrial integration (USDA).

USMCA partners bring fresh fruits and vegetables to U.S. tables

The U.S. is highly reliant on its USMCA partners for the year-round availability of fresh fruits and vegetables. In 2023, Mexico and Canada supplied:

- 51% and 2%, respectively, of U.S. fresh fruit imports.

- 69% and 20%, respectively, of fresh vegetable imports, in terms of value.

The growing dependence of U.S. domestic availability on imports has been reinforced by trade milestones such as NAFTA's signing in 1994, the completion of the transition to tariff- and quota-free trade among North America since 2008, and the entry into force of the USMCA (ERS-USDA).

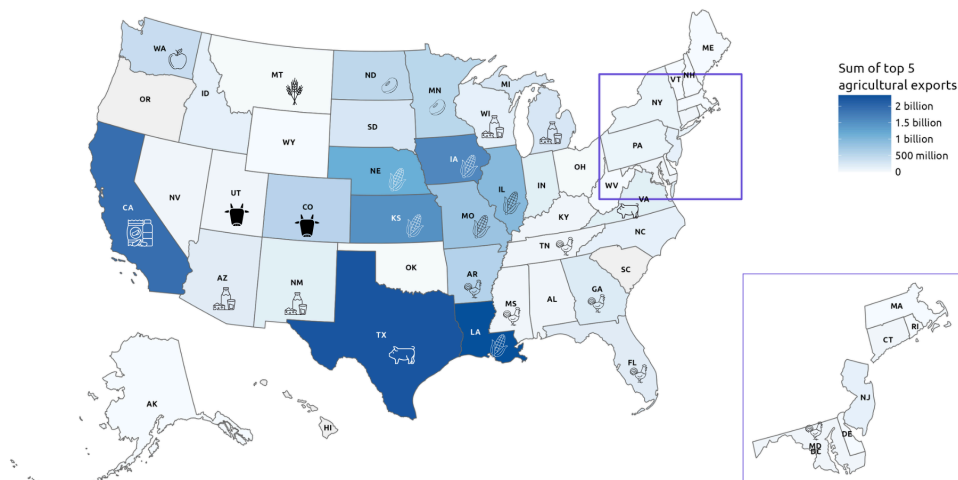
- Since 1981, imports have expanded almost without interruption, and by 2023, nearly 60% of fresh fruit and 35% of fresh vegetable availability in the U.S. came from imports, which underscores the critical role of trade in food security (USDA).

Grains, meat, and dairy exports from the U.S. depend heavily on Mexican demand

At the state level, producers and consumers benefit from year-round agricultural trade with Mexico.

- In 2025, the top exports to Mexico include commodities such as corn, pork, dairy products, soybeans, poultry and beef.
 - The industries responsible for exporting these commodities are key economic engines across U.S. regions, anchoring jobs and production nationwide.
 - **Soybean and corn exports** alone supported more than **212,516 jobs**, and **beef, chicken, and pork exports** supported about **157,434 jobs** (USDA, 2025).
- California, Texas, and Louisiana surpassed **USD 6.5 billion** in agricultural exports to Mexico in 2025.

What agricultural product do U.S. states export to Mexico? Top agricultural exports by state, 2025



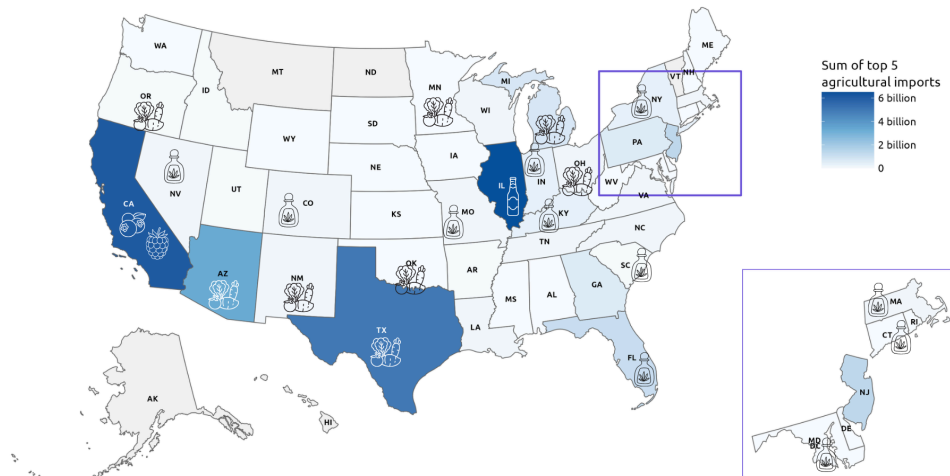
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Mexico is a key export market for U.S. states across major agribusiness sectors.

- **Corn:** The top U.S. agricultural export to Mexico in 2025, led by **Corn Belt states** including **Louisiana, Iowa, Illinois, Kansas, Nebraska, and Missouri**, all of which list corn as their primary export to Mexico. **Louisiana alone exported over USD 1.5 billion.**
- **Pork:** **Texas and Virginia** together exported over USD 1.1 billion to Mexico in 2025, accounting for nearly half of total U.S. pork exports to Mexico.
- **Poultry & Beef:** **Poultry meat** leads exports in **Arkansas**, while **Colorado** stands out in **beef.**
- **Dairy:** **Michigan, New Mexico, and Wisconsin** are the leading dairy exporters to Mexico.
- **Soybeans:** **Minnesota, North Dakota, and South Dakota** primarily export soybeans to Mexico.
- **Other products:** **California**, one of the largest agricultural exporters to Mexico, specializes in **food preparations.**

Mexico's fresh fruits and vegetables ensure year-round availability for U.S. consumers

What agricultural products do U.S. states import from Mexico? Top agricultural imports by state, 2025



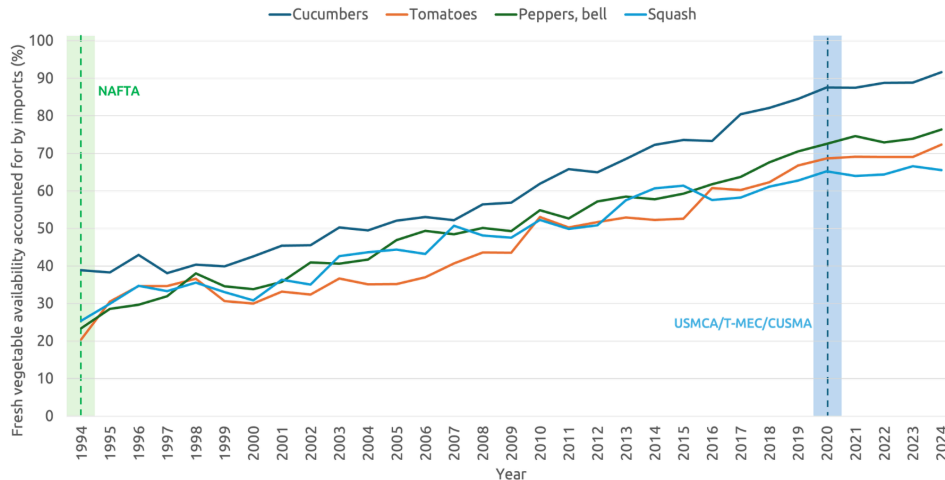
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Top imports from Mexico across key U.S. states:

- **Fresh vegetables:** **Arizona, Texas, Michigan, and Ohio** are among the states that import the largest volumes of this commodity from Mexico.
 - **35% of the U.S. fresh vegetable availability depends on imports**, and Mexican imports explain **69%** of fresh vegetable availability (USDA).
 - **Tomato supply is highly import-dependent, and Mexico is the leading supplier:** In 2023, 70% of U.S. tomato supply came from imports, and Mexico accounted for 90% of that volume. As of 2024, **72.3% of fresh tomatoes in the U.S. came from imports!**

Import share of fresh vegetable availability (by commodity)

Yearly, 1994 - 2024

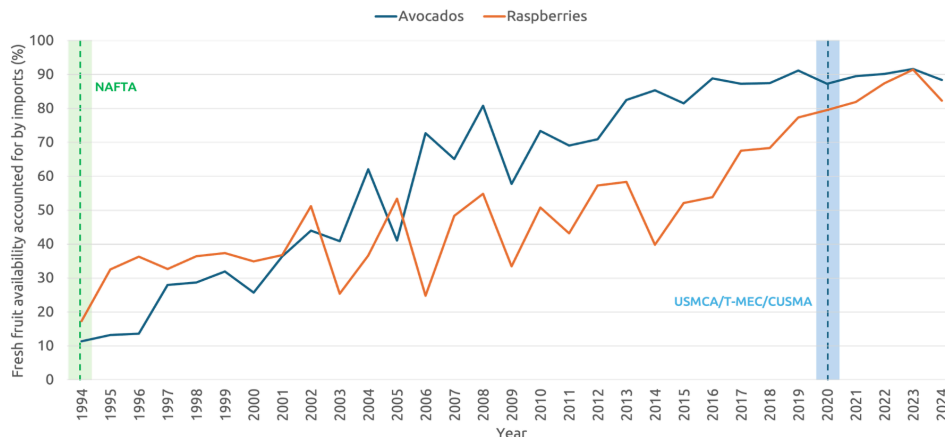


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- **Fresh fruits (berries):** California's top agricultural import from Mexico is berries, which amounted to more than USD 2 billion in 2025.
 - Mexico plays a critical role in U.S. berry supply and between 1994 and 2024, the import share of fresh raspberries availability increased from 17.3% to 82.3%.
 - Among key fresh fruits, **avocados** stand out, as **88.4% of the fresh avocados available in the U.S. in 2024 were imported, with Mexico as the dominant supplier.**

Import share of fresh fruit availability (by commodity)

Yearly, 1994 - 2024



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Raise a glass to Mexico! It keeps the drinks flowing across U.S. states

- **Distilled spirits: Florida, Kentucky, New York, and Indiana** show the highest dependence on this product in their agricultural imports from Mexico, totaling a value of **USD 1.5 billion in 2025**.
- **Beer: Illinois's** top agricultural import from Mexico is beer. **The beer industry exemplifies a binational industry**, U.S. producers export key grain inputs to Mexico's breweries, where beers are processed, bottled, and sent back to the U.S. market for consumption.

Tariffs and trade wars: a losing game for U.S. farmers

- During the 2018–2019 U.S.–China trade war, retaliatory tariffs led the federal government to pay \$28 billion in compensation, equivalent to 92% of tariff revenue.
- Trade wars create uncertainty for agro-industrial supply chains, increase input costs for producers, and reduce competitiveness in global markets.
- U.S. consumption of **fresh fruits, vegetables, and tree nuts** depends on imports, and these commodities **make up 17% of the "food-at-home" Consumer Price Index (CPI) basket** (a measure for food inflation), which would mean that an **increase in tariffs would have an effect on prices of key foods in the diet of Americans**.

Food security in North America relies on fertilizer availability

- The Strait of Hormuz is a critical fertilizer chokepoint. The war in the Middle East not only disrupts oil and LNG markets. It also threatens fertilizer flows, putting future crops, food availability, and food prices at risk (World Bank). The Persian Gulf accounts for 46% of global urea trade and is the most widely used nitrogen fertilizer (WEF).
- While the U.S. and Mexico are net fertilizer importers (USDA), Canada is the world's leading exporter of potash (Government of Canada). The opportunity is not autarky but coordinated regional investment and logistics to make fertilizer supply more resilient.
 - Potash supplies potassium, a nutrient essential for crops such as corn, potatoes, fruits, and vegetables because it improves water regulation, root strength, and resilience under drought stress (South Dakota State University).
- The U.S. is already a major nitrogen platform and producer of ammonia and nitrogen fertilizers, which are used both as direct fertilizers in some grain systems and as feedstock for products such as urea (FAO), while Mexico is the **region's co-production opportunity**.
 - In Mexico, PEMEX already produces ammonia, and could expand nitrogen fertilizer production by leveraging U.S. natural gas and broader North American **energy integration**, together with Mexico's industrial capacity. That makes Mexico a key platform for a **North American nitrogen corridor**.

A North American fertilizer resilience agenda should leverage co-production.

Expand nitrogen fertilizer production in the United States and Mexico, secure Canadian potash for regional agriculture, and coordinate transport, inventories, and long-term supply agreements across the three countries.

This would reduce dependence on distant supply chains exposed to geopolitical shocks and **strengthen North American food security.**