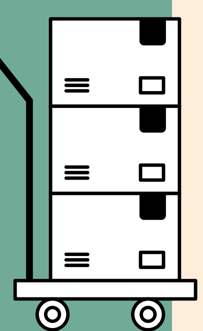
The integration of courier services in the USMCA/T-MEC region

This infographic was prepared by México, ¿cómo vamos?
using information from The North American Project, the OECD, U.S. Customs and Border Protection, the Congressional Research Service, Statistics Canada, the U.S. Census Bureau, and INEGI.

How do courier and parcel delivery services power North America's competitiveness?



By connecting the country to **global value chains,** they **strengthen regional competitiveness** and **create quality jobs.** Their role is reflected in:

→ Mexico's manufacturing industry

→ North America's co-production model

→ The agile flow of documents and goods among firms, government, and households

→ Strategic invisible infrastructure that supported the response to the COVID-19 health emergency

Between 2023 and 2024, express shipments grew by 36% year over year, underscoring their logistical relevance for industrial competitiveness and regional trade (CBP).

Regulatory framework and trilateral integration

Chapter 7 of the USMCA/T-MEC, Article 7.8 Express Shipments, establishes expedited and specific customs procedures for these shipments, without distinction by value or weight, and incorporates minimis thresholds under which customs duties—and, where applicable, taxes—are waived.

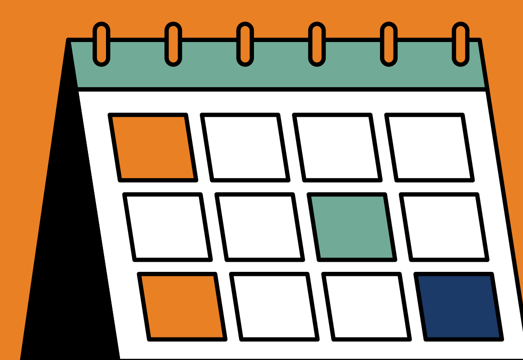
→ A solid regulatory framework promotes investment and the digital integration of trade under the USMCA/T-MEC, raising regional competitiveness.

Expedited and specific customs procedures enable express logistics chains:

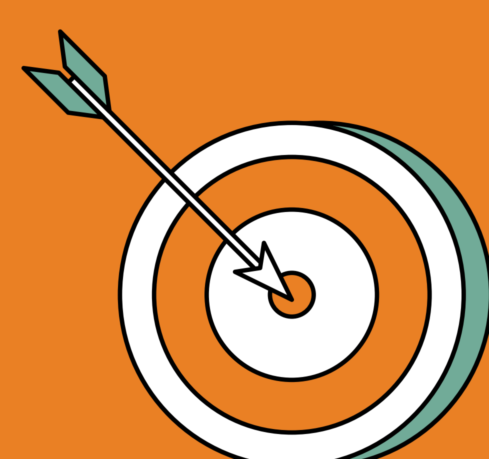
→ They allow just-in-time deliveries through courier operators and facilitate the integration of SMEs into value chains without intermediary costs.

De minimis threshold:

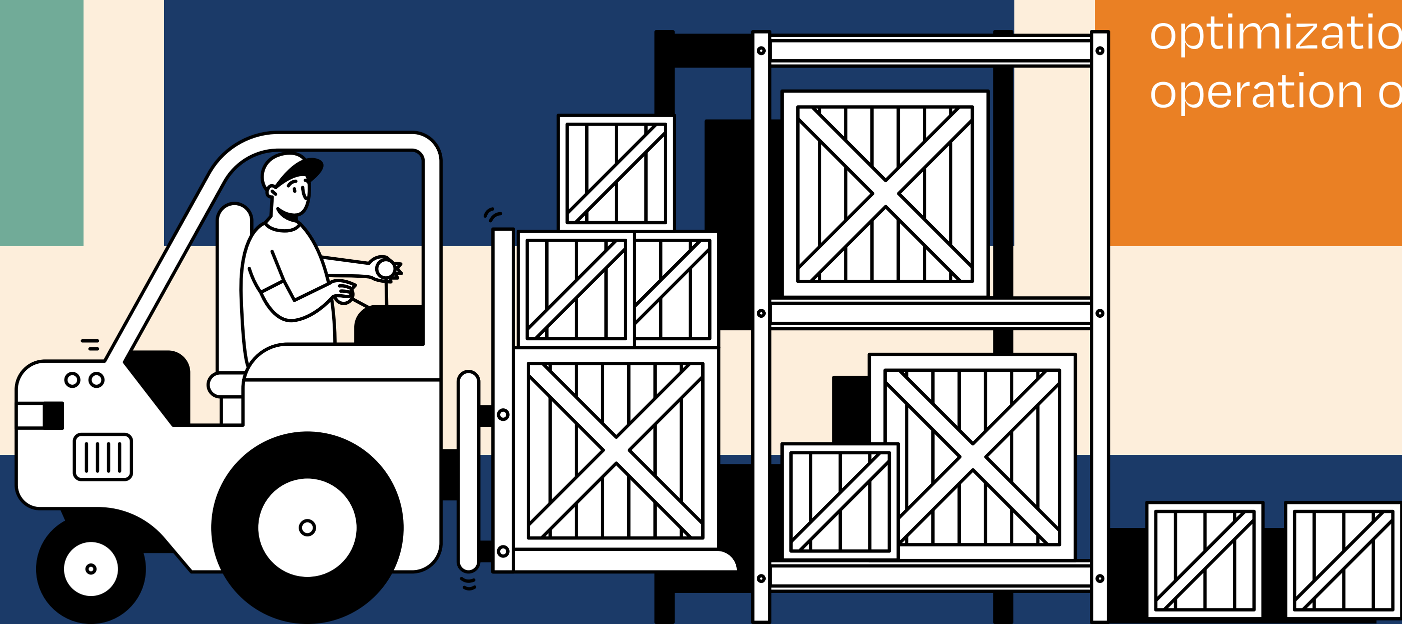
Defines the maximum value for importing without duties or full customs procedures.



Reduces costs and delivery times, enabling vertical integration.



Is key to just-in-time, inventory optimization and the continuous operation of production lines.



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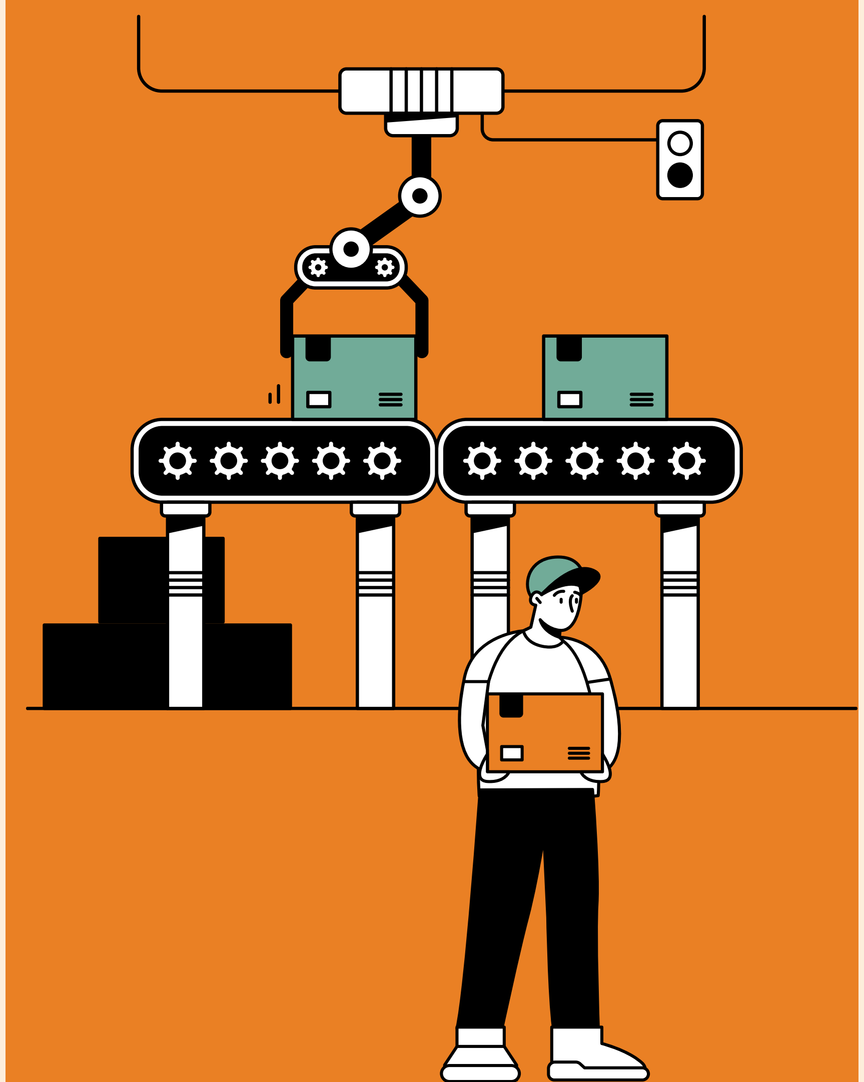
Courier and parcel delivery services and manufacturing industries



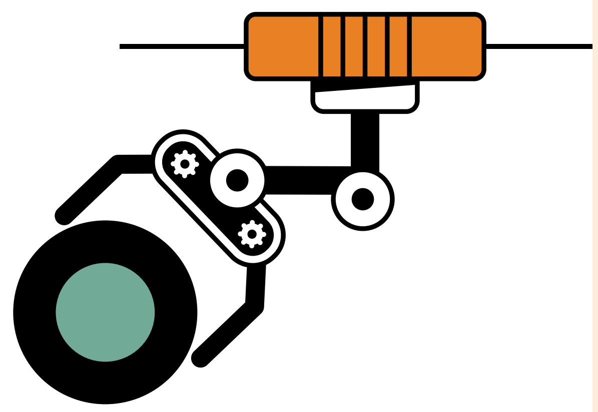
The **competitiveness of manufacturing industries in the USMCA/T-MEC partner** countries depends on **logistical agility.** These services facilitate productive integration among complementary economies and prevent disruptions in production.

Manufacturing sector share of GDP (Q3 2025):

- 21.4% of GDP, the largest share in the economy
- 9.4% of GDP
- 7.8% of GDP

North America's co-production model

Trade in intermediate goods via courier services blurs the line between domestic and foreign production, strengthening regional supply chains.



The automotive industry is an example of the co-production model, auto parts can cross the borders of the three countries **up to eight times.**

→When an assembler requires a part to export under the USMCA/T-MEC, these services and their regulation enable agile exchanges, essential to keep the automotive supply chain operating.

The USMCA/T-MEC creates an opportunity to strengthen co-production in the technology sector, reinforce regional supply chains, and drive growth and high-paying jobs.

Are courier services and e-commerce the same?

They are not! To protect the co-production model, it is key to understand their differences and intersections in order to regulate without compromising logistical efficiency.

Express courier and parcel delivery (SCIAN subsector 492)

- Fast, trackable deliveries, with delivery windows of hours or days.
- Predominantly Business-to-Business (B2B) shipments and critical industrial logistics.
- Includes consumer online purchases; however, most shipments are between firms.
- Also moves shipments without a commercial transaction: personal effects, samples with no commercial value, and repatriation of belongings.

What courier and parcel delivery services are not

- E-commerce platforms
- Large wholesale firms posing as courier operators
- Freight or passenger transport services
- Last-mile delivery platforms
- Postal services or the state-owned operator

Electronic commerce (e-commerce), the OECD defines it by how the order is placed (digitally), not on how fast it is delivered.

- Orders placed through digital plat-forms, without specifying the logis-tics channel.
- Includes B2B orders placed through digital portals.