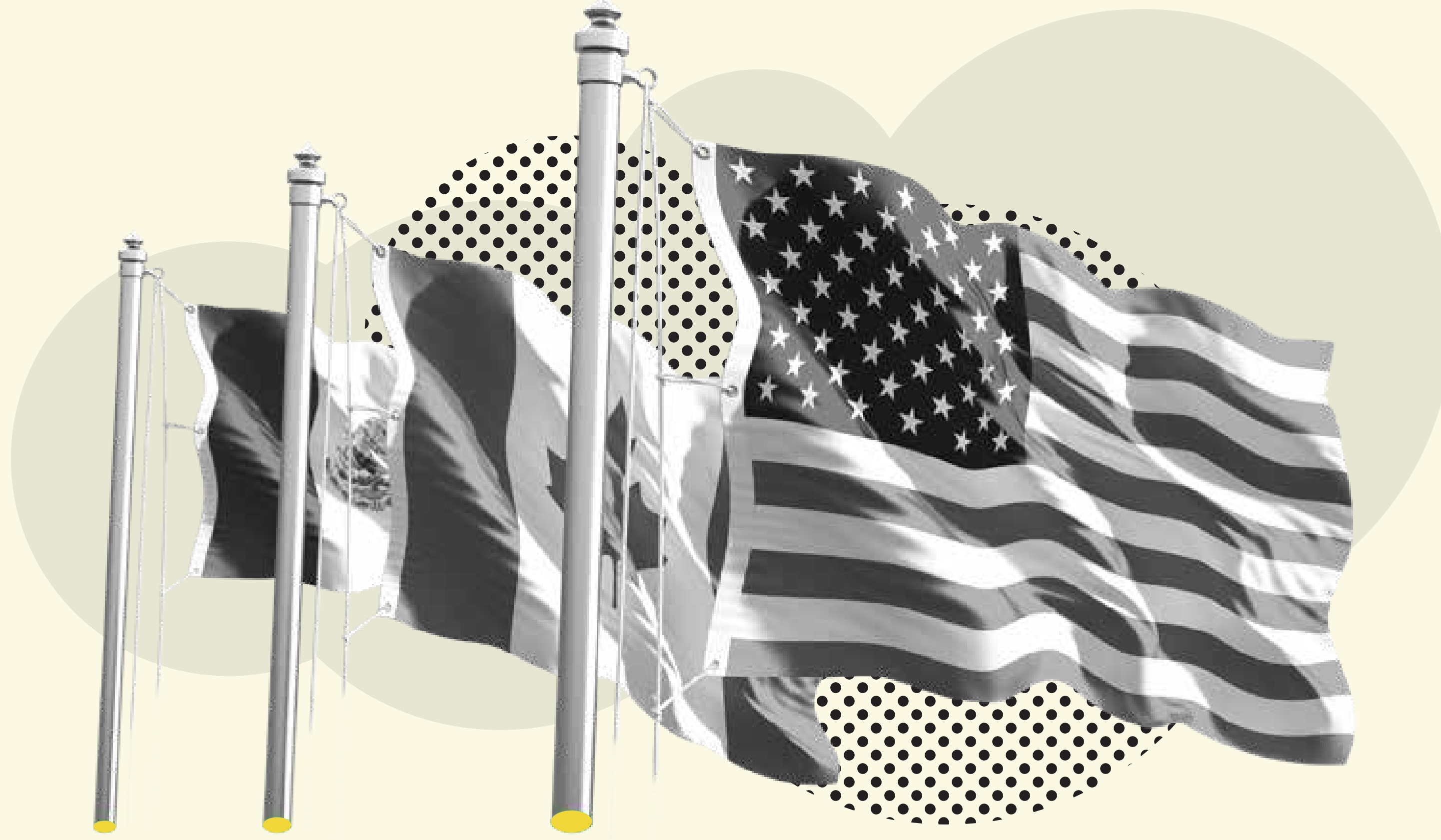
Why North America is more competitive together | USMCA fast facts



North America at a glance

The U.S., Mexico, and Canada account for nearly 30% of global GDP (IMF, april 2026) more than:

- China: **17%**
- The European Union: **18%**
- Latin America and the Caribbean: **6%**

This underscores the **scale of North America as an economic bloc** and the strategic importance of deeper regional integration.

Trade has doubled in the last two decades

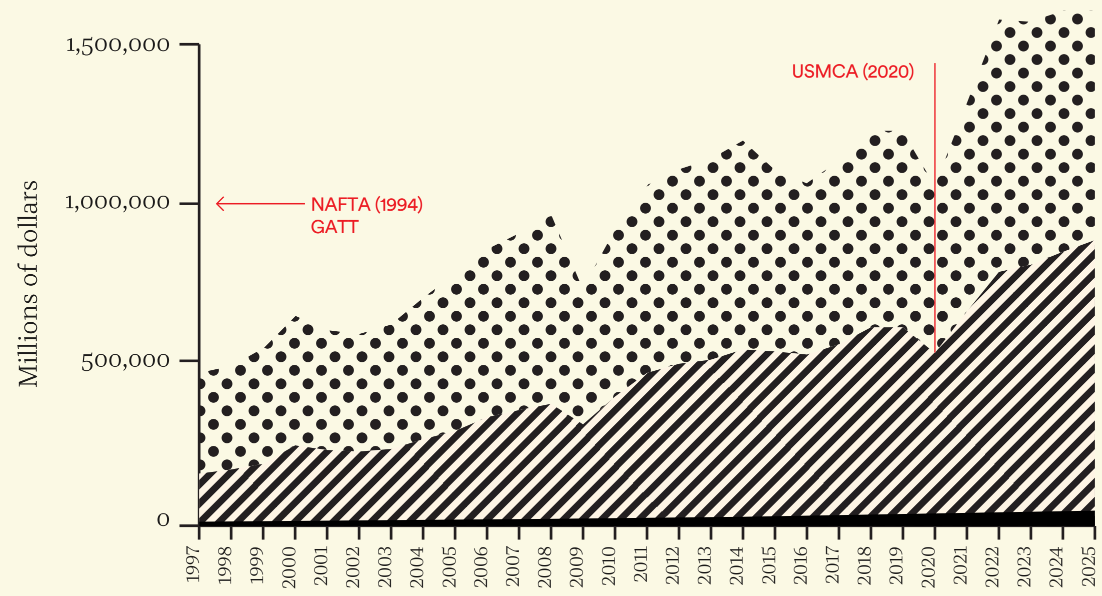
Trilateral goods trade grew from **USD 803 billion to more than USD 1.6 trillion over the last 20 years.**

- Since the post-pandemic rebound of 2022, trade has remained around USD 1.6 trillion, despite recent tariff pressures it remains 30% above pre-COVID levels.

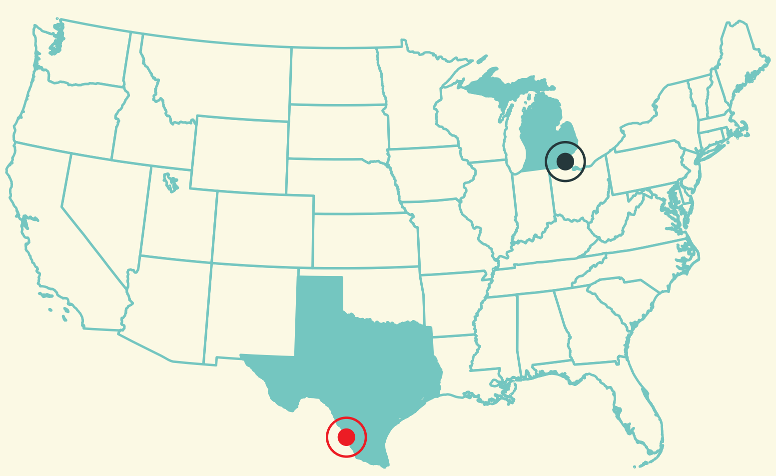
International trade

Between USMCA (T-MEC/CUSMA) members, yearly

Mexico-Canada | Mexico-USA | USA-Canada



Made by México, ¿cómo vamos? With data from the US Department of Commerce and INEGI



Laredo = largest land port

Detroit = largest U.S.–Canada truck crossing

Dynamic trade corridors power North American production

The Mexico–U.S. border moves **USD 2.39 billion in goods every day** (USTR).

- The **Port of Laredo, Texas** handled USD 296.2 billion in freight value in 2025, making it the busiest land port for goods trade between Mexico and the U.S. (BTS).
- The leading truck port for goods trade between the U.S. and Canada is **Detroit, Michigan,** with USD 94.2 billion in truck freight value in 2025 (BTS).

United States' top trading partners

Mexico and Canada were the United States' two largest trading partners in 2025 (U.S. Census Bureau).

North America is a co-production platform built on integrated value chains

The automotive sector is one of the clearest examples of North American co-production. Auto parts can **cross regional borders 7–8 times before a vehicle is assembled** (CRS).

Tariffs tax the entire production platform—not just one country.

- In 2025, U.S. motor vehicles and parts industrial production fell 1.92% year over year in December (FRED), and Mexico's vehicle production declined 0.9% over the year (INEGI).

Jobs depend on integration

- As of December 2025, 13 million jobs in the United States were supported by trade with Mexico and Canada (Business Roundtable).
- USMCA links market access to regional production and labor standards. By 2026, the Rapid Response Labor Mechanism had been activated 50 times and resolved cases benefiting more than 43,000 workers in 2025 (USTR).

When supply chains are disrupted, manufacturing jobs are affected across the region. Between 2024 and 2025, North America lost manufacturing jobs across all three countries:

United States:	Mexico:	Canada:
-113,000 (BLS/FRED)	-48,375 (INEGI)	-40,600 (StatCan)

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Food security starts with regional trade

The region's agricultural markets are not isolated national systems but a connected food platform.

- Mexico became the United States' largest agricultural trading partner in 2025, accounting close to 23% of U.S. agricultural imports and serving as the destination for 16.9% of U.S. agricultural exports, followed by Canada (U.S. Census Bureau).

In 2023, for commodities such as fresh fruits and vegetables, 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.

Energy powers competitiveness

Shared regional energy infrastructure powers competitiveness

North America is energy-abundant and has the opportunity to translate it into a vertically integrated supply-chain.

- The U.S. has become a major natural gas and Liquefied Natural Gas (LNG) powerhouse.
- Mexico depends on U.S. natural gas for roughly 70% of domestic demand (CSIS, 2023).
- Canada and the U.S. already operate as a deeply integrated energy market in crude oil, natural gas, and electricity.

Together, U.S. energy abundance, Canadian resources, and Mexican infrastructure can strengthen regional manufacturing.

Source: EIA (September, 2025)

Critical minerals and advanced manufacturing

North America has the mineral endowment needed to support advanced manufacturing but it requires a regional strategy to reduce dependence on concentrated suppliers in Asia. Canada is especially important for this purpose, The Government of Canada reports as of March 2025:

- 56 active critical mineral mines
- 31 processing facilities
- 171 advanced mineral projects

Investment needs certainty

USMCA provides investment protections (Chapter 14), transparency (Chapter 29), and dispute-settlement mechanisms (Chapter 31) that help firms invest across North America with confidence.

Harmonized standards reduce costs

Common standards help industries produce faster, innovate, and compete more effectively with Asia.

- In practice, this matters for integrated sectors such as automotive, steel and aluminum, and emerging clean-technology industries, where more aligned standards can lower costs, speed production, support innovation and decarbonization and make the region more competitive.

The 2026 Review: a defining moment to prioritize regional economic security

The first USMCA Joint Review is underway. Deciding the continuity of the treaty makes the review a high-stakes moment for North American trade, jobs, investment, and economic security.

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SOURCE: USMCA, EIA, U.S. Census Bureau, Government of Canada, FRED, Brookings, INEGI, USTR, CRS and CSIS.