



The interdependence of the agribusiness markets in North America

Agro-industrial trade between Mexico, the U.S., and Canada, key to food security thanks to the complementary nature of the region's crops.

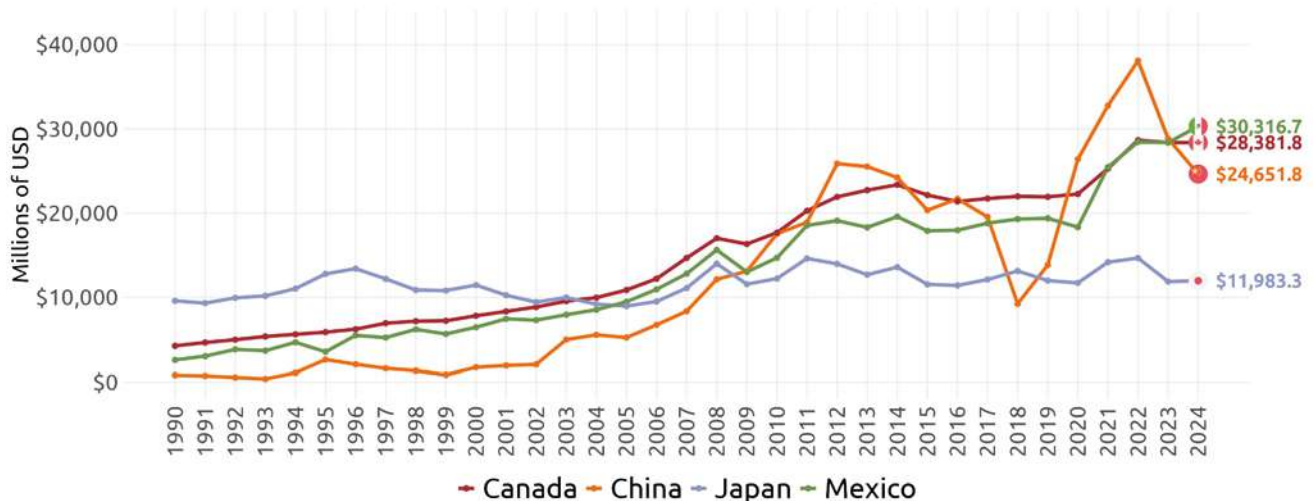
Agro-industrial trade in North America, facilitated by the USMCA, plays a key role in the region's food security. Mexico and Canada are the main U.S. agro-industrial trading partners, both in exports and imports, highlighting the complementarity of agricultural products in the three countries.

→ In 2024, the top five destination markets accounted for 61% of the total value of U.S. agricultural exports, with Mexico leading the list—surpassing both China and Canada (ERS-USDA).

- Mexico is the main destination of US agricultural exports.
 - In 2025, Mexico accounted for 15.4% of all U.S. agricultural exports and Canada for 11.8% (Census Bureau).
 - Mexico remains the main destination for U.S. agricultural exports, with its 15.4% share marking the highest second-quarter level since 2010.

U.S. Agricultural products exports by country

Millions of USD, constant 2024 dollars



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Mexico, in particular, plays a crucial role in ensuring the year-round supply of fresh fruits and vegetables to the U.S., thanks to its complementary growing seasons. 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. In this con-



text, the USMCA partners have been fundamental for U.S. farmers.

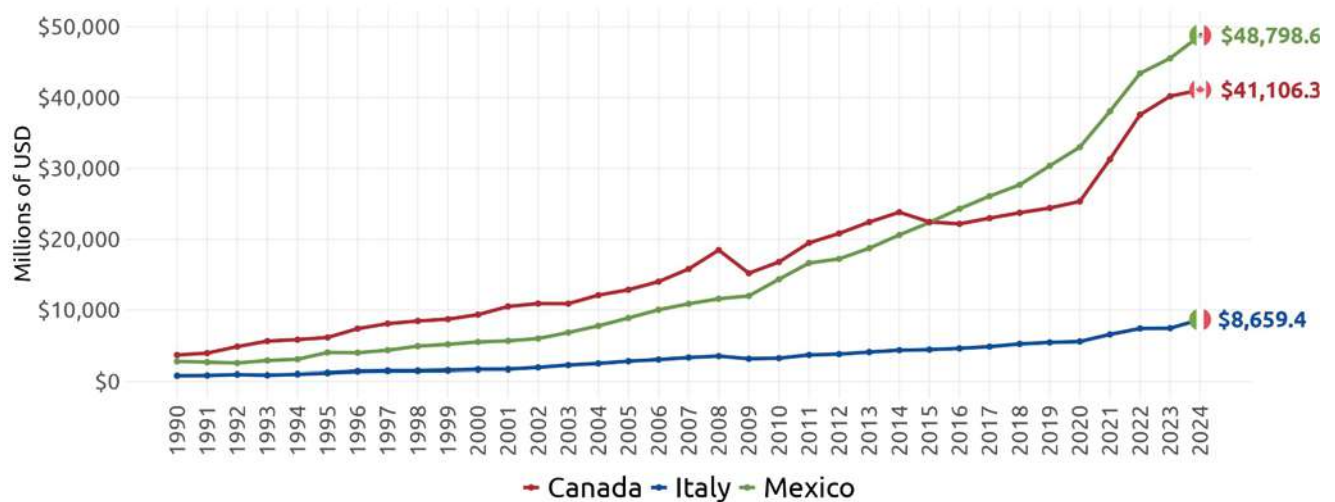
→ Mexico is the United States' largest agricultural trading partner in terms of combined exports and imports, with Canada being a close second and in 2024, both countries accounted for more than 40% of the total of U.S. agricultural imports.

→ As of the second quarter of 2025 Mexico continues to lead the market for U.S. imports of agricultural products, explaining almost 30% of them (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).

U.S. Agricultural products imports by country of origin

Millions of USD, constant 2024 dollars



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Which countries 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.

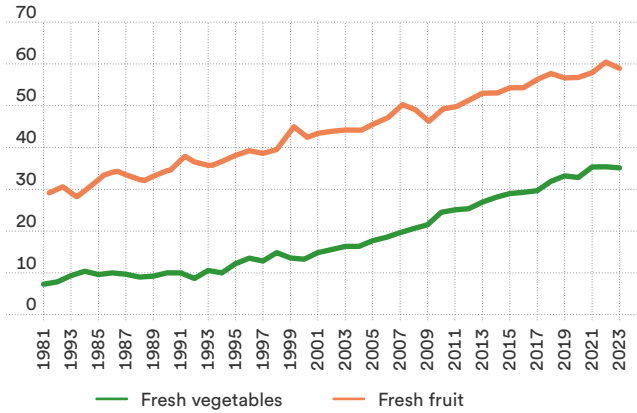
The growing dependence of U.S. domestic availability on imports has been reinforced by trade milestones such as NAFTA's signing in 1994, the completion of the transition to tariff- and quota-free trade among North America since 2008, and the entry into force of the USMCA (ERS-USDA).

→ 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—underscoring the critical role of trade in food security.

Imports as a Percentage of Fresh Fruit and Vegetable Availability in the U.S., 1981 - 2023.



Source: USDA

Graph note: Availability is calculated as production minus exports plus imports and is measured in terms of volume.

The agricultural trade relationship between Mexico and the United States is highly complementary, with Mexico supplying products that fill seasonal and supply gaps in U.S. agriculture and that also play a central role in everyday consumption.

→ In 2024, almost 75% of U.S. agricultural imports from Mexico are vegetables, fruit, beverages, and distilled spirits. This reflects Mexico’s crop diversity, the popularity of products such as beer, tequila, and avocados in the U.S, and complementary growing seasons (USDA).

As the share of imports in domestic availability of fresh fruit and vegetables grows, so does the share in commodities in which Mexico is the leading supplier.

→ Between 1994 and 2023, the import share of fresh raspberries availability went from 17.3% to 91.4%.

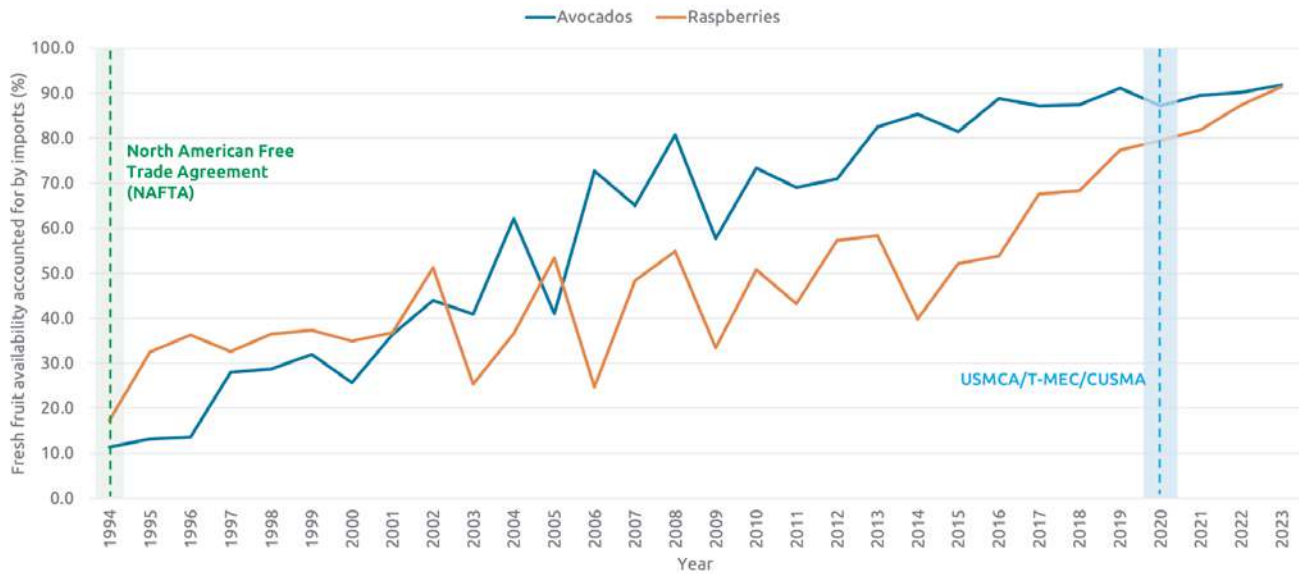
→ **In 2023, 91.9% of fresh avocados available in the U.S. were imported, with Mexico as the dominant supplier.** This makes avocados one of the most import-dependent foods in the American diet, alongside tropical fruits like papayas, mangoes, and limes—crops in which Mexico leads global production and U.S. supply.



– The main export market is the U.S concentrating more than 80% of avocado exports, followed by Canada with 7% (Foreign Agricultural Center, USDA).

Import share of fresh fruit availability (by commodity)

Yearly, 1994–2023



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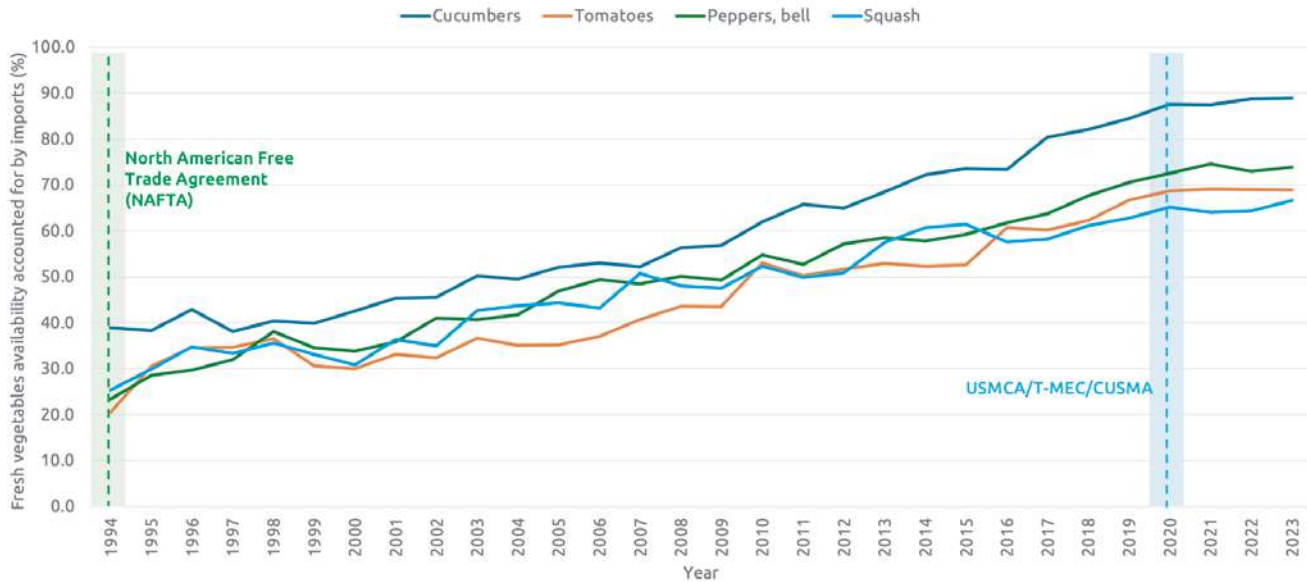
The share of fresh vegetables availability accounted for by imports is lower than for fresh fruits, yet the same pattern holds: Mexico remains the leading supplier for many of these key commodities, with a growing percentage in domestic availability.

- In 2023, Mexican imports accounted for the majority of fresh tomato availability in the U.S. market. Overall, imports represented 70% of the commodity’s supply, with Mexico contributing 90% of that volume and Canada supplying 9%.
 - According to USDA estimates, imports from Mexico alone explained about 65% of the total domestic supply of fresh tomatoes, underscoring the central role of USMCA partners in meeting U.S. demand.

- For commodities such as fresh squash and cucumbers, Mexico serves as the primary supplier, and both have reached record highs in their share of imports relative to U.S. domestic availability.
 - Between 1994 and 2023, fresh cucumber import share increased 50 percentage points and for fresh squash the growth was 41.2 pp.
- The domestic availability of fresh bell peppers is also highly dependent on Mexican and Canadian imports. In 2023, 74% of availability was accounted for by imports.

Import share of fresh vegetable availability (by commodity)

Yearly, 1994–2023



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Impact of agricultural trade on U.S. employment and economy.

Agricultural jobs

- In January 2025, 2.31 million people were employed in agriculture and related sectors (Federal Reserve Bank of St. Louis, with data from the BLS).
- Between 2013 to 2023, the largest employment gains were seen in crop support services, which grew by 17,400 jobs, marking a 6% increase over the decade, and in the livestock sector with 29,000 jobs added in the decade (USDA).
- In 2023, every \$1 billion in U.S. agricultural exports supported 5,997 jobs on average. In that same year, ten commodities accounted for almost half of the 1 million full-time jobs, with corn and soybean exports leading the way (USDA).

Economic impact

- In 2023, each \$1 of U.S. agricultural exports generated \$2.06 in total domestic economic activity, contributing to \$362.4 billion in output (ERS-USDA).

Agricultural trade in the USMCA region

- U.S. agricultural exports to Mexico consist of 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). Canada, for its part, primarily imports fresh fruits and vegetables, processed products, and pork from the United States.
- Mexico exports to the U.S. and Canada: Fresh vegetables and fruits such as avocados, tomatoes, and berries (USDA). Also, 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).

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

Trade disputes have significantly affected U.S. farmers. The 2018–2019 trade war with China imposed tariffs that generated retaliatory measures on their exports, causing substantial losses.

- The federal government had to grant subsidies equivalent to 92% of the tariffs collected to compensate for the losses.
- Only 8% of tariff revenue represented actual net income.
- In 2018 and 2019, the Trump administration allocated \$28 billion in compensation payments to farmers affected by Chinese retaliation (Council on Foreign Relations).
- Tariffs and trade wars impose higher costs on agricultural producers and affect the stability of agro-industrial trade. In the case of consumers, higher prices could be expected due to tariff increases in this sector:
- Around 20% of the U.S. consumption of fresh fruits, vegetables, and tree nuts consumption is explained by imports from Mexico and 5% from Canada. These products alone make up 17% of the “food-at-home” Consumer Price Index (CPI) basket (a measure for food inflation) which means that an increase in tariffs would have an effect of prices in food key to the diet of Americans. Since the imports come from concentrated growing areas the amount of substitutes is limited contributing to increase in prices lasting a little bit longer (Kansas City Fed).



Success story: regional integration of the beer industry



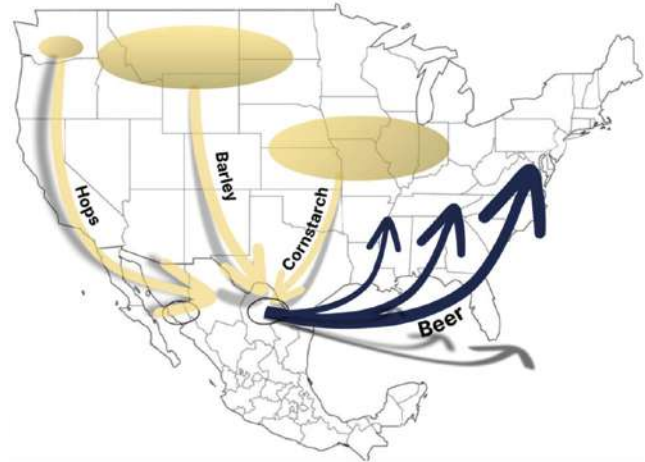
The beer industry exemplifies a binational industry, US producers export key grain inputs to Mexico’s breweries, where they are processed, bottled up, and sent back to the US market for consumption.

→ Barley sourced from the US includes significant quantities grown by family farmers in Idaho, Montana, and North Dakota, which is often malted before being shipped by truck and rail to Mexico’s breweries.

→ Other key inputs include corn starch from farms across the “Corn Belt” of the Midwest and Central Plains, and hops sourced from growers in Washington State’s Yakima Valley.

→ Breweries in Mexico then ship back the *Corona*, *Modelo*, *Pacífico*, and *Victoria* to consumers in the US. In 2022, the US imported \$6.88 billion in beer, mainly from Mexico (\$5.41 billion).

The bilateral beer trade experience Brewery supply chain Mexico-U.S.



Source: USDA

The USMCA: key to North American food security and agro-industrial competitiveness

Agro-industrial trade in North America is a strategic pillar for food security, job creation, and the region’s economic stability. The complementarity among the USMCA partners ensures the supply of fresh food, strengthens the agricultural sector, and maintains global competitiveness.

However, uncertainty stemming from tariffs and protectionist measures can affect this relationship, increasing costs and reducing opportunities for producers in the region. Promoting policies of integration and trade stability will be key to guaranteeing the resilience of agro-industrial value chains in North America.