THE INTERNATIONAL

TEXAS A&M INTERNATIONAL UNIVERSITY

TEXAS CENTER

FOR BORDER ECONOMIC & ENTERPRISE DEVELOPMENT

TEXAS A&M INTERNATIONAL UNIVERSITY

CROSSING PATHS:

Insights into U.S. International Trade

Understanding Trade Through Data Narratives

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2025

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Introduction

The Port of Laredo

The Port of Laredo is the largest inland port in the United States, situated on the U.S.-Mexico border along the Rio Grande. Unlike a traditional seaport, it's a land port of entry, a hub where goods, vehicles, and people cross between the U.S. and Mexico.

Port Laredo has been in the trade business since the city was settled in 1755 and boasts four international bridges, one rail bridge, a U.S. customs district, and intermodal yard, all located along I-35, the busiest trade route in Texas.

The port's reach extends into the skies as well. Laredo International Airport (LRD) operates the only bi-national federal inspection station in the United States, housing both U.S. and Mexican Customs facilities, allowing exports like auto parts, electronics, and aerospace products to be pre-cleared at Laredo for expedited entry. Major carriers like FedEx and UPS maintain operations at the airport, further cementing Laredo's role as a complete, multi-modal trade hub.

Port Infrastructure

INTERNATIONAL BRIDGES

Bridge I: Gateway to the Americas	
Bridge II: Juarez-Lincoln	
Bridge III: Colombia Solidarity	
Bridge IV: World Trade Bridge	
International Rail Bridge	

AIRPORT

Laredo International Airport	

Introduction

A Year That Tested Three Decades of Integration

In 1994, three North American nations made a wager: that reducing barriers between their economies would generate shared prosperity. Over three decades, that wager paid off. By 2024, trilateral trade under NAFTA and its successor, the United States-Mexico-Canada Agreement (USMCA), had grown from $265 billion to $1.6 trillion annually. Supply chains spanning the continent became the backbone of automotive manufacturing, electronics assembly, energy distribution, and agricultural trade. Port Laredo, situated at the geographic and economic center of this integration, processed $340 billion in trade value in 2024 alone, making it the busiest port of entry in the United States.

Then 2025 happened.

Three tariff announcements between January and June disrupted the assumptions underlying North American commerce. A 25 percent tariff on all products from Mexico, followed by targeted levies on vehicles, auto parts, aluminum, iron, and steel, sent shockwaves through the integrated manufacturing networks that had taken decades to build. Vehicle imports from Mexico through Port Laredo fell by $4.1 billion in the first half of the year. Metals imports dropped 13.6 percent. The ripple effects extended beyond trade values into freight income, drayage operations, warehousing activity, and brokerage services across the Los Dos Laredos corridor.

The 2025 edition of Crossing Paths: Insights into U.S. International Trade documents this inflection point. Published by the Texas Center for Border Economic and Enterprise Development (TCBEED) at Texas A&M International University, the series tracked trade dynamics as they unfolded, from the detailed mechanics of port operations and commodity flows to the systemic disruptions caused by shifting trade policy, and finally to institutional proposals designed to strengthen North American competitiveness for the next generation.

This compilation organizes the year's ten editions into a three-part narrative arc. The first section, Chapters 1 through 6, maps the architecture of North American trade integration: the sectors that drive it, the infrastruins it, and the geographic corridors through which it flows. The second section, Chapter 7, confronts the disruption head-on, measuring the trade and supply chain impacts of the 2025 tariffs at both the national and Port Laredo levels. The third section, Chapters 8 through 10, shifts from diagnosis to prescription, presenting three institutional frameworks: a Binational Customs Agency, a digital infrastructure coordination initiative, and a trilateral industrial coordination council, designed to address the structural vulnerabilities the year exposed.

Introduction

Methodology and Approach

Crossing Paths relies on a structured, data-driven methodology that integrates multiple federal, binational, and local sources to present a coherent picture of U.S.–Mexico trade. The compilation draws on primary datasets from:

- U.S. Census Bureau's Economic Indicators Division
- Bureau of Transportation Statistics
- Mexico's INEGI
- City of Laredo Bridge Department
- Additional federal agency datasets related to tariffs, regulatory actions, and enforcement

These sources are harmonized to ensure comparability across jurisdictions and time periods. The process includes aligning classification systems, validating anomalies through cross-source checks, and constructing derived indicators that illuminate underlying trade dynamics.

Each edition follows a consistent analytical structure designed to make complex information accessible while preserving rigor. The approach includes:

- Situating each topic within the broader U.S.–Mexico trade relationship
- Presenting key indicators, metrics, and derived measures
- Interpreting the drivers behind observed patterns, including policy shifts, supply-chain adjustments, and industry trends
- Drawing implications for policy, institutional capacity, and regional competitiveness

The 2025 series expands this framework in ways that deepen analytical insight and strengthen policy relevance. The enhancements include:

- Moving beyond descriptive statistics to incorporate causal analysis, particularly in evaluating tariff impacts through elasticity-based estimates and counterfactual scenarios
- Introducing original institutional design proposals developed through TCBEED's research, offering concrete operational frameworks rather than general recommendations
- Connecting chapter-level findings into a cohesive narrative about the trajectory of North American integration and the governance structures required to support it

Across the compilation, the methodology balances quantitative rigor with contextual interpretation. Data are analyzed not only for what they show, but for what they reveal about evolving regional dynamics, policy effectiveness, and the institutional demands of a more integrated North American economy.

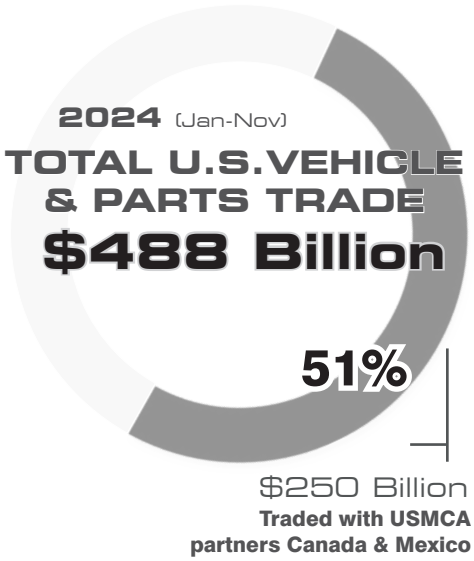
Part I : The Architecture of Integration

The first six editions of the 2025 series map the systems that move $1.6 trillion in goods across the continent each year. They examine specific sectors, infrastructure networks, and geographic corridors, building a picture of North American trade as something constructed deliberately over three decades, not a natural phenomenon, but an engineered system with identifiable components, measurable outputs, and real vulnerabilities.

Chapter 1: The U.S. Automotive and Vehicle Parts Trade

Overview

The first 2025 Crossing Paths edition opened with the sector that best illustrates North American integration: automotive and vehicle parts. With $488 billion in total trade through November 2024, this sector accounts for the single largest category of goods crossing the U.S.-Mexico border. USMCA partners Canada and Mexico together represent 51 percent of total U.S. vehicle and parts trade, $250 billion flowing through an integrated production network where engines, transmissions, body panels, and finished vehicles cross borders multiple times before reaching consumers.



Key Elements and Data Points

U.S. Top 5 Vehicle & Parts Trading Countries
2024 (Jan-Nov)

Exports to:		Imports from:	
1	$50 Billion Canada	1	$126 Billion Mexico
2	$27 Billion Mexico	2	$46.6 Billion Canada
3	$8.8 Billion Germany	3	$45.6 Billion Japan
4	$6.1 Billion China	4	$41.3 Billion South Korea
5	$4.6 Billion Australia	5	$31.2 Billion Germany

Mexico leads U.S. vehicle and parts imports at $126 billion, while Canada leads exports at $50 billion, revealing the directional flows of an industry organized around comparative advantages in labor costs, technical capacity, and market proximity. The twenty-year trend line captures the scale of transformation: U.S.-Mexico automotive trade grew from $34 billion in 2003 to over $153 billion by 2024, a 350 percent increase driven by the deliberate construction of cross-border manufacturing ecosystems.

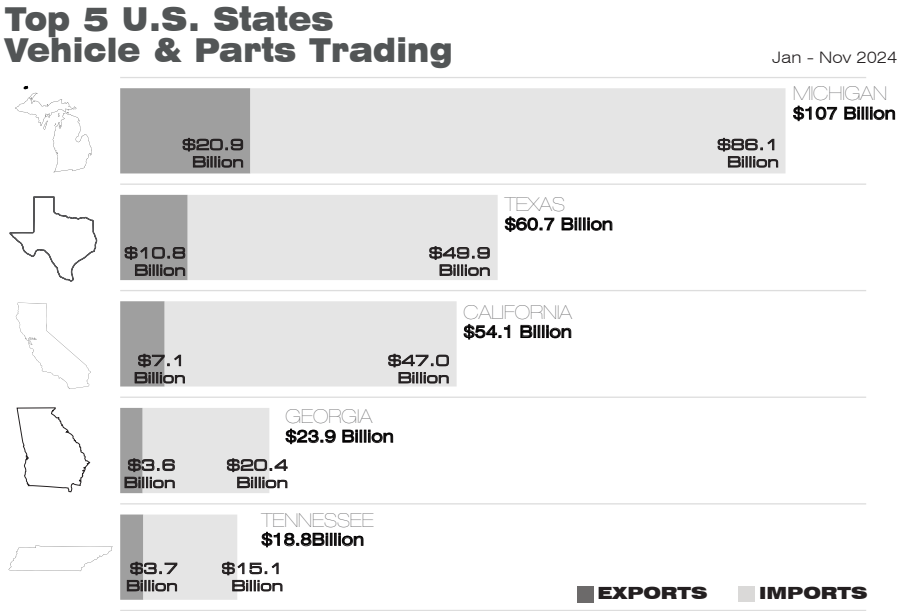
Source: U.S. Census Bureau: Economic Indicators Division

Part I : The Architecture of Integration

Chapter 1: The U.S. Automotive and Vehicle Parts Trade

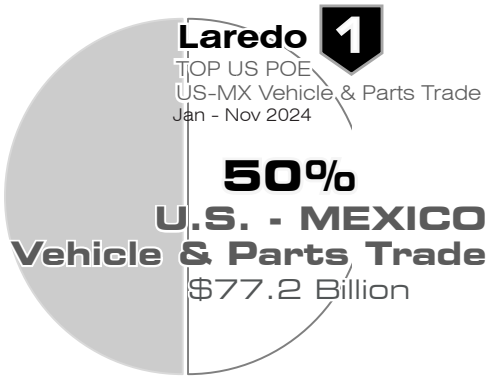
Key Elements and Data Points

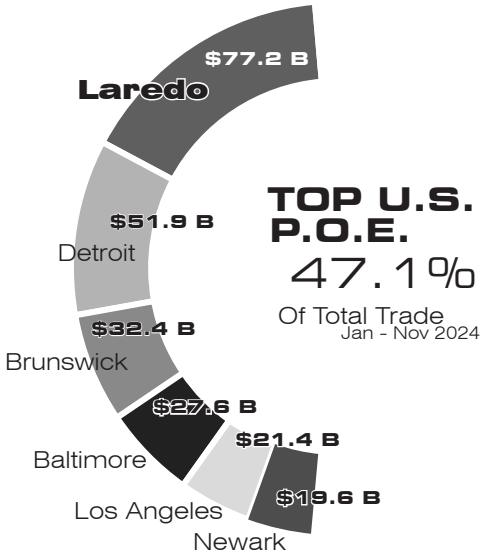
Five U.S. states dominate the sector. Michigan leads at $107 billion, followed by Texas ($60.7 billion), California ($54.1 billion), Georgia ($45.5 billion), and Tennessee ($18.8 billion). The concentration is instructive: these five states account for $264.6 billion in vehicle and parts trade, with 61 percent of that value representing trade with USMCA partners. Texas stands out with 75 percent of its automotive trade flowing to or from Mexico and Canada.



Trade Dynamics

Port Laredo's position in this sector is commanding. The port handles $77.2 billion in vehicle and parts trade, ranking first among all U.S. ports of entry.





The top five POEs collectively account for 47.1 percent of all U.S. vehicle and parts trade, and 59 percent of the trade flowing through these gateways involves USMCA partners. At Port Laredo specifically, 99 percent of vehicle and parts trade is with Mexico, and the port processes 50 percent of all U.S.-Mexico automotive commerce.

Source: U.S. Census Bureau: Economic Indicators Division

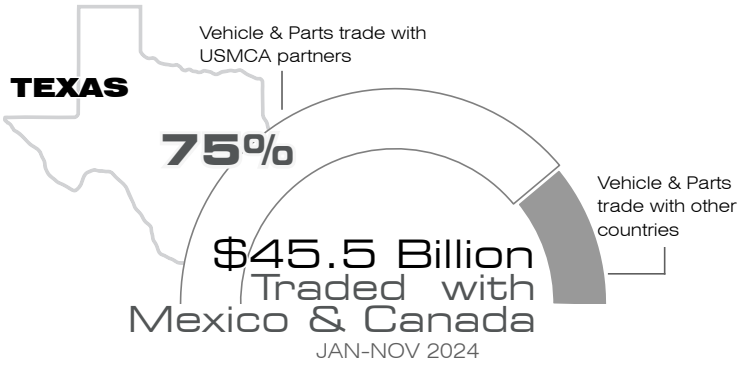
Chapter 1: The U.S. Automotive and Vehicle Parts Trade

Broader Implications

The automotive sector's deep cross-border integration makes it both a testament to what USMCA has achieved and a leading indicator of what trade disruptions can damage. When tariffs target vehicles and auto parts, they do not simply raise prices on imported cars; they disrupt a production system in which components cross the border an average of eight times during manufacturing.

This edition establishes this reality as the baseline against which the year's policy changes would be measured.

Texas Automotive Trade



Source: U.S. Census Bureau: Economic Indicators Division

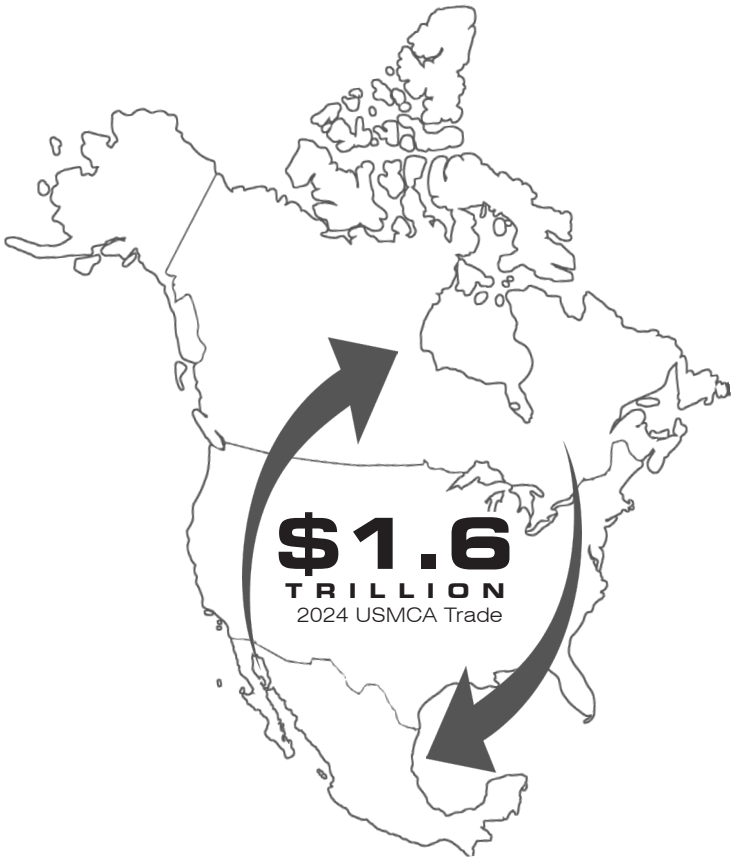
Part I : The Architecture of Integration

The automotive sector reveals the depth of North American manufacturing integration. The second edition widened the aperture to examine the full breadth of that integration, and the three decades of policy architecture that produced it.

Chapter 2: Thirty Years of NAFTA/USMCA Integration

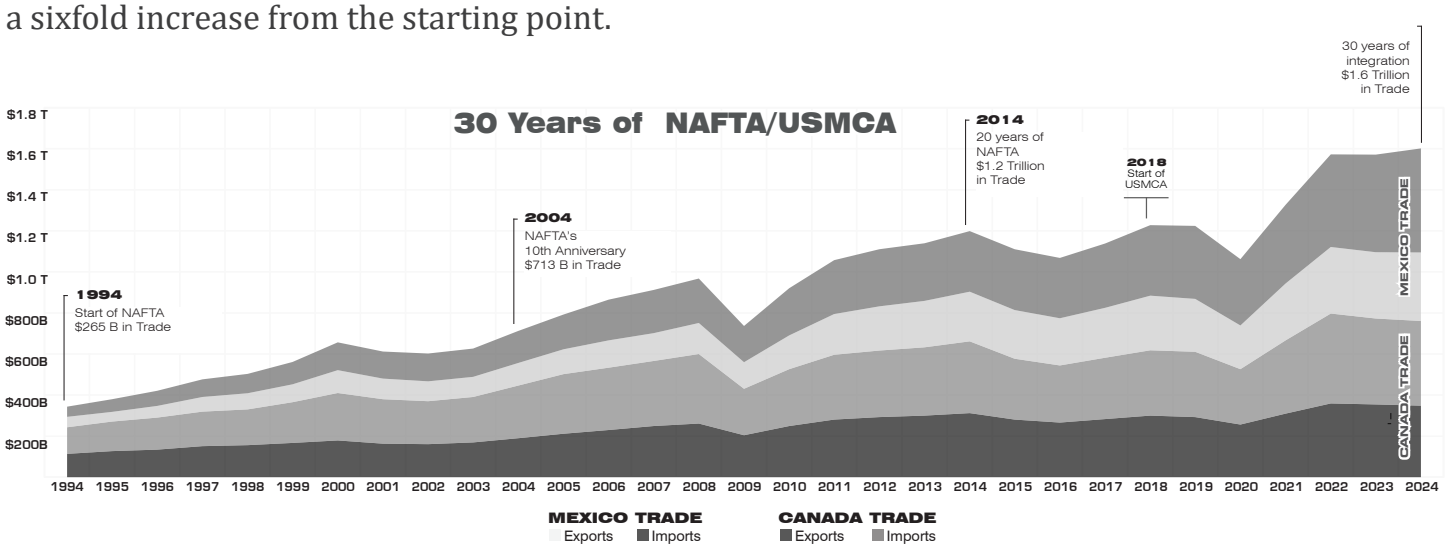
Overview

The second edition marked a milestone: thirty years since NAFTA launched what would become the world's largest integrated trade zone. The numbers tell a story of compounding growth. U.S. trade with USMCA partners reached $1.6 trillion in 2024, representing 30 percent of total U.S. international trade. Mexico alone accounted for $840 billion (15.8 percent of U.S. world trade), surpassing Canada's $761 billion (14.3 percent) for the second consecutive year.



Key Elements and Data Points

The thirty-year trajectory reveals four distinct phases. At NAFTA's inception in 1994, trilateral trade stood at $265 billion. By 2004, NAFTA's tenth anniversary, it had nearly tripled to $713 billion. The transition from NAFTA to USMCA in 2018 occurred with trade at approximately $1.2 trillion. By 2024, the total reached $1.6 trillion, a sixfold increase from the starting point.



Source: U.S. Census Bureau: Economic Indicators Division

Chapter 2: Thirty Years of NAFTA/USMCA Integration

Key Elements and Data Points

The analysis of top U.S.-Mexico traded commodities reveals three dominant sectors: vehicles and parts ($165.6 billion, 19.7 percent of bilateral trade), boilers and machinery ($157.7 billion, 18.8 percent), and electronics ($142.8 billion, 17.0 percent). Together, these three categories represent 55.5 percent of all U.S.-Mexico trade. Texas emerges as a critical hub across all three sectors, while Michigan maintains leadership in the automotive segment at 35 percent.

2024
Top U.S.-Mexico Traded Commodities

Vehicles & Parts

Total Trade: **$165.6 B**

Trade Share: **19.7%**

Top Trading States:

1	MICHIGAN	$57.9 Billion	35.0%
2	TEXAS	$32.4 Billion	19.6%
3	CALIFORNIA	$16.6 Billion	10.1%
4	TENNESSEE	$9.0 Billion	5.4%
5	OHIO	$4.0 Billion	2.4%

Boilers & Machinery

Total Trade: **$157.7 B**

Trade Share: **18.8%**

Top Trading States:

1	TEXAS	$70.2 Billion	44.5%
2	CALIFORNIA	$13.1 Billion	8.3%
3	MICHIGAN	$9.6 Billion	6.1%
4	NORTH CAROLINA	$6.0 Billion	3.8%
5	GEORGIA	$5.9 Billion	3.7%

Electronics

Total Trade: **$142.8 B**

Trade Share: **17.0%**

Top Trading States:

1	TEXAS	$51.3 Billion	35.9%
2	CALIFORNIA	$20.6 Billion	14.4%
3	MICHIGAN	$12.3 Billion	8.6%
4	GEORGIA	$6.9 Billion	4.8%
5	ARIZONA	$5.0 Billion	3.5%

Trade Dynamics

The commodity comparison between U.S.-Mexico and U.S.-Canada trade reveals distinct but complementary trade structures. While vehicles, machinery, and electronics dominate U.S.-Mexico flows, U.S.-Canada trade is led by mineral fuels and oil ($151.3 billion, 19.9 percent), followed by vehicles and parts, and then machinery. This complementarity, Mexico's strength in manufacturing assembly paired with Canada's energy and resource base, is precisely what gives the trilateral relationship its resilience

2024
Top U.S.-Canada Traded Commodities

Mineral Fuel-Oil

Total Trade: **$151.3 B**

Trade Share: **19.9%**

Top Trading States:

1	ILLINOIS	$49.5 Billion	32.7%
2	TEXAS	$19.2 Billion	12.7%
3	MINNESOTA	$11.9 Billion	7.9%
4	WASHINGTON	$10.9 Billion	7.2%
5	OKLAHOMA	$7.3 Billion	4.8%

Boilers & Machinery

Total Trade: **$81.4 B**

Trade Share: **10.7%**

Top Trading States:

1	TEXAS	$7.5 Billion	9.2%
2	OHIO	$6.0 Billion	7.4%
3	MICHIGAN	$5.8 Billion	7.1%
4	ILLINOIS	$4.7 Billion	5.7%
5	CALIFORNIA	$3.9 Billion	4.7%

Vehicles & Parts

Total Trade: **$104.1B**

Trade Share: **13.7%**

Top Trading States:

1	MICHIGAN	$34.6 Billion	33.2%
2	TEXAS	$16.6 Billion	16.0%
3	INDIANA	$6.2 Billion	5.9%
4	OHIO	$5.6 Billion	5.4%
5	KENTUCKY	$4.6 Billion	4.4%

Source: U.S. Census Bureau: Economic Indicators Division, Images: MS Copilot Image Creator

Chapter 2: Thirty Years of NAFTA/USMCA Integration

Broader Implications

Thirty years of data demonstrate that NAFTA/USMCA did not merely lower tariffs; it created an integrated continental economy with specialized regional roles, optimized logistics corridors, and deeply intertwined supply chains. This edition frames the year's subsequent analyses against this backdrop: any policy change affecting this system acts not on isolated bilateral trade flows but on a $1.6 trillion integrated architecture.

15.8%
of U.S. World Trade

U.S.-Mexico Total Trade

$840B

Jan - Dec 2024

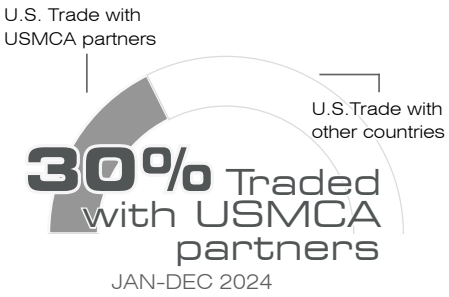
14.3%
of U.S. World Trade

U.S.-Canada Total Trade

$761B

Jan - Dec 2024

U.S Total World Trade



Source: U.S. Census Bureau: Economic Indicators Division

Part I : The Architecture of Integration

Thirty years of integration produced specific geographic concentrations. No place embodies that concentration more than Port Laredo, which the third edition examined in detail.

Chapter 3: Port Laredo and the Top U.S. Ports of Entry

Overview

Port Laredo maintained its position as the number one U.S. port of entry by trade value in 2024, processing $340 billion with 5.9 percent year-over-year growth. The top five ports of entry, Laredo, Los Angeles ($332 billion), Chicago ($331 billion), JFK International Airport ($251 billion), and Newark ($244 billion), collectively process 28 percent of America's global trade, with Laredo leading the group for the second consecutive year.

2024 Top 5 U.S. POE by Trade Value

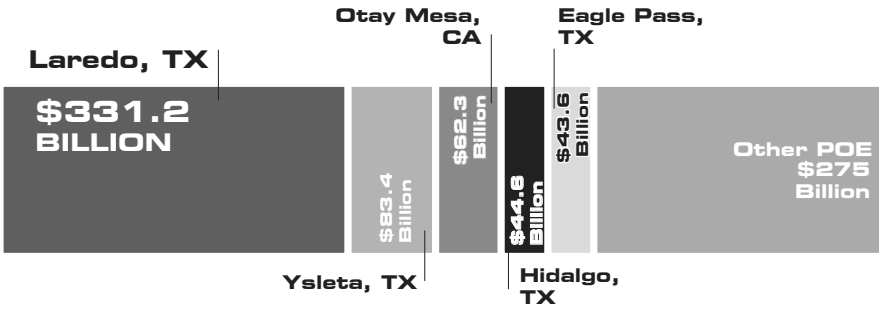
1. $340 Billion Laredo, TX
2. $332 Billion Los Angeles, CA
3. $331 Billion Chicago, IL
4. $251 Billion JFK Int'l Airport
5. $244 Billion Newark, NJ

Key Elements and Data Points

This edition presented a critical geographic finding: 67 percent of all U.S.-Mexico bilateral trade crosses through just five ports of entry, with Port Laredo as the cornerstone at $331.2 billion, nearly 40 percent of total U.S.-Mexico trade. The prominence of Texas ports is striking, with four of the top five U.S.-Mexico POEs located in the state: Laredo, Eagle Pass ($34.6 billion), Hidalgo ($26.3 billion), and Ysleta ($44.38 billion).

U.S.-MEXICO TRADE

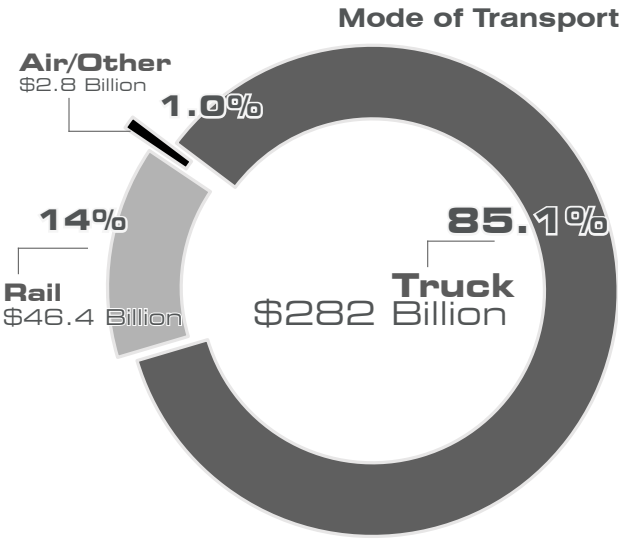
U.S-MEXICO TOP 5 P.O.E. 67% Of Total 2024 U.S-MexicoTrade



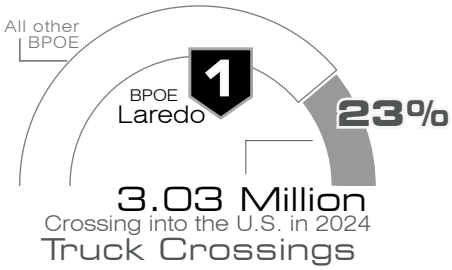
Source: U.S. Census Bureau: Economic Indicators Division, Bureau of Transportation Statistics

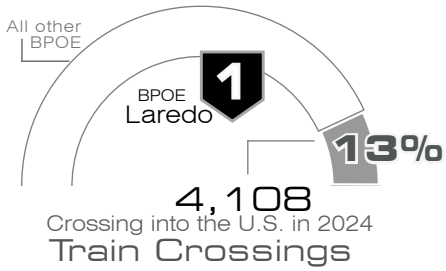
Chapter 3: Port Laredo and the Top U.S. Ports of Entry

Key Elements and Data Points



Port Laredo processes 23 percent of all U.S.-bound truck traffic, with 3.03 million truck crossings in 2024, and handles 13 percent of all northbound train crossings.



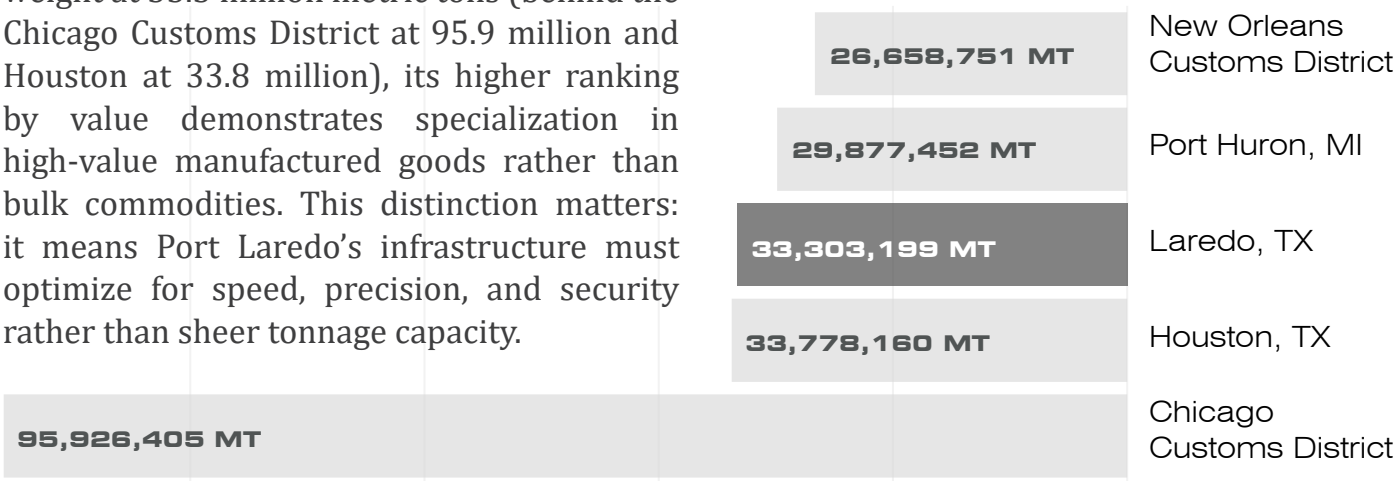


The mode-of-transport analysis reveals the physical mechanics of this trade. Truck freight accounts for 85.1 percent of Port Laredo's trade value ($282 billion), with rail at 14 percent ($46.4 billion) and air/other modes at 1 percent ($2.8 billion).

Trade Dynamics

The freight volume analysis adds an important dimension. While Port Laredo ranks third by weight at 33.3 million metric tons (behind the Chicago Customs District at 95.9 million and Houston at 33.8 million), its higher ranking by value demonstrates specialization in high-value manufactured goods rather than bulk commodities. This distinction matters: it means Port Laredo's infrastructure must optimize for speed, precision, and security rather than sheer tonnage capacity.

2024 Top 5 U.S. POE by Handled Weight in Metric Tons

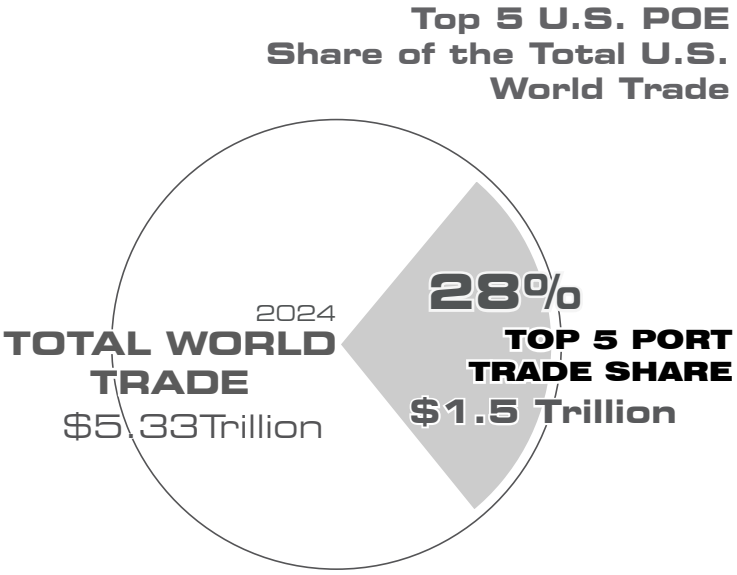


Source: U.S. Census Bureau: Economic Indicators Division, Bureau of Transportation Statistics

Chapter 3: Port Laredo and the Top U.S. Ports of Entry

Broader Implications

The concentration of 40 percent of U.S.-Mexico trade through a single port of entry is both a testament to Laredo's logistical efficiency and a measure of systemic risk. Any disruption at Port Laredo, whether from infrastructure failure, policy change, or security incident, propagates through supply chains that reach Michigan's auto plants, California's technology firms, and Georgia's distribution centers. This edition quantifies this concentration as a structural reality demanding both celebration and contingency planning.



Source: U.S. Census Bureau: Economic Indicators Division, Bureau of Transportation Statistics

Part I : The Architecture of Integration

Behind the aggregate trade values lie physical crossings, bridges, lanes, and inspection stations. The fourth edition zoomed in on Port Laredo's bridge infrastructure to examine how, exactly, 23 million crossings per year are managed.

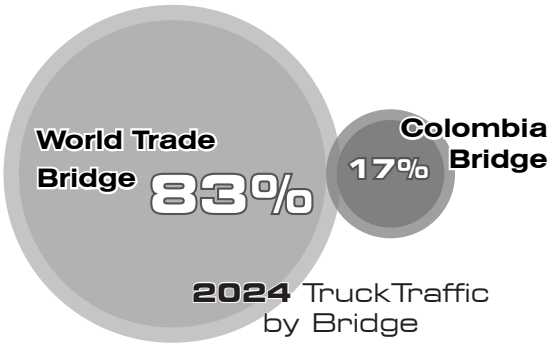
Chapter 4: Port Laredo's International Bridge Infrastructure

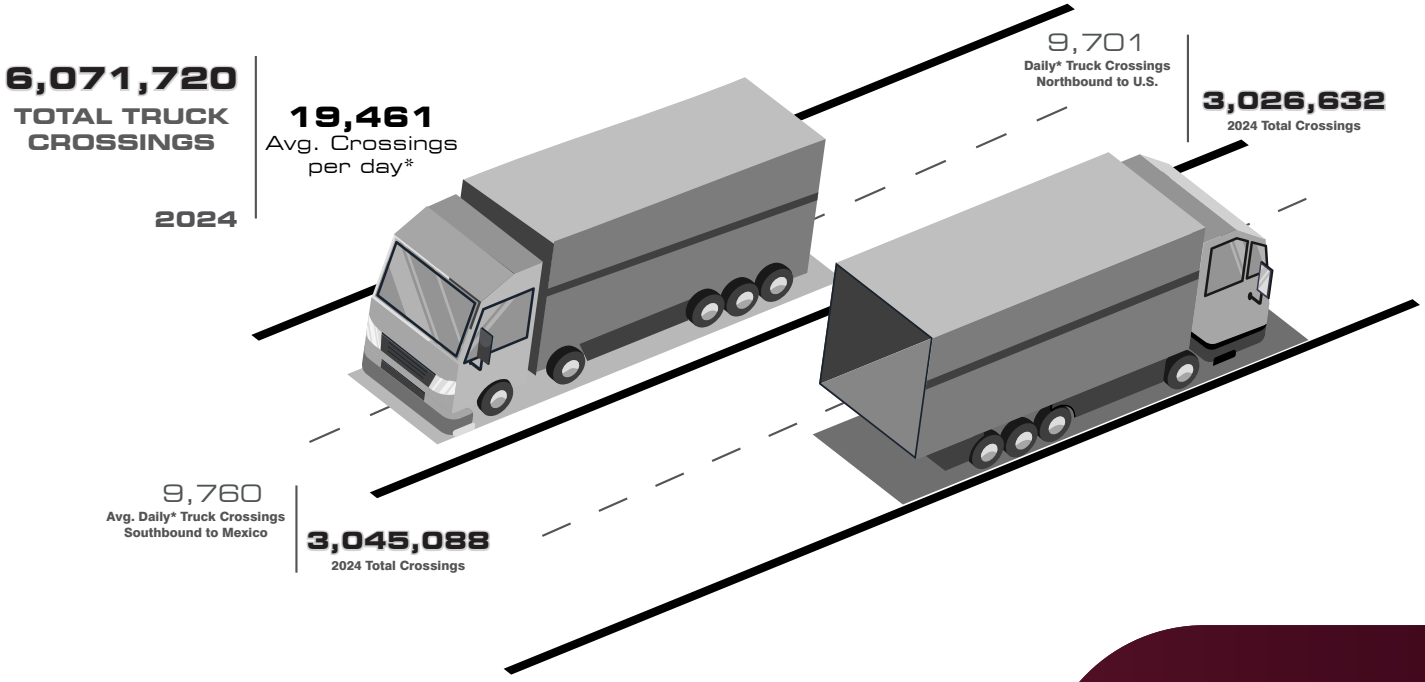
Overview

This edition provided a granular analysis of Port Laredo's international bridge system, the physical infrastructure that translates trade agreements into actual commerce. With over 23 million annual crossings, including 6 million trucks, 12 million vehicles, and 5.3 million pedestrians, Laredo's international bridges serve as vital connections that support economic integration, social ties, and community interaction across the Los Dos Laredos corridor.

Key Elements and Data Points

Commercial truck traffic provides the clearest picture of trade infrastructure in operation. Total truck crossings reached 6,071,720 in 2024, averaging 19,461 crossings per day on a six-day workweek standard. The World Trade Bridge handles 83 percent of truck traffic, while the Colombia Bridge manages the complementary 17 percent. Combined, these specialized facilities form an integrated system that has grown by 58 percent over the past decade.



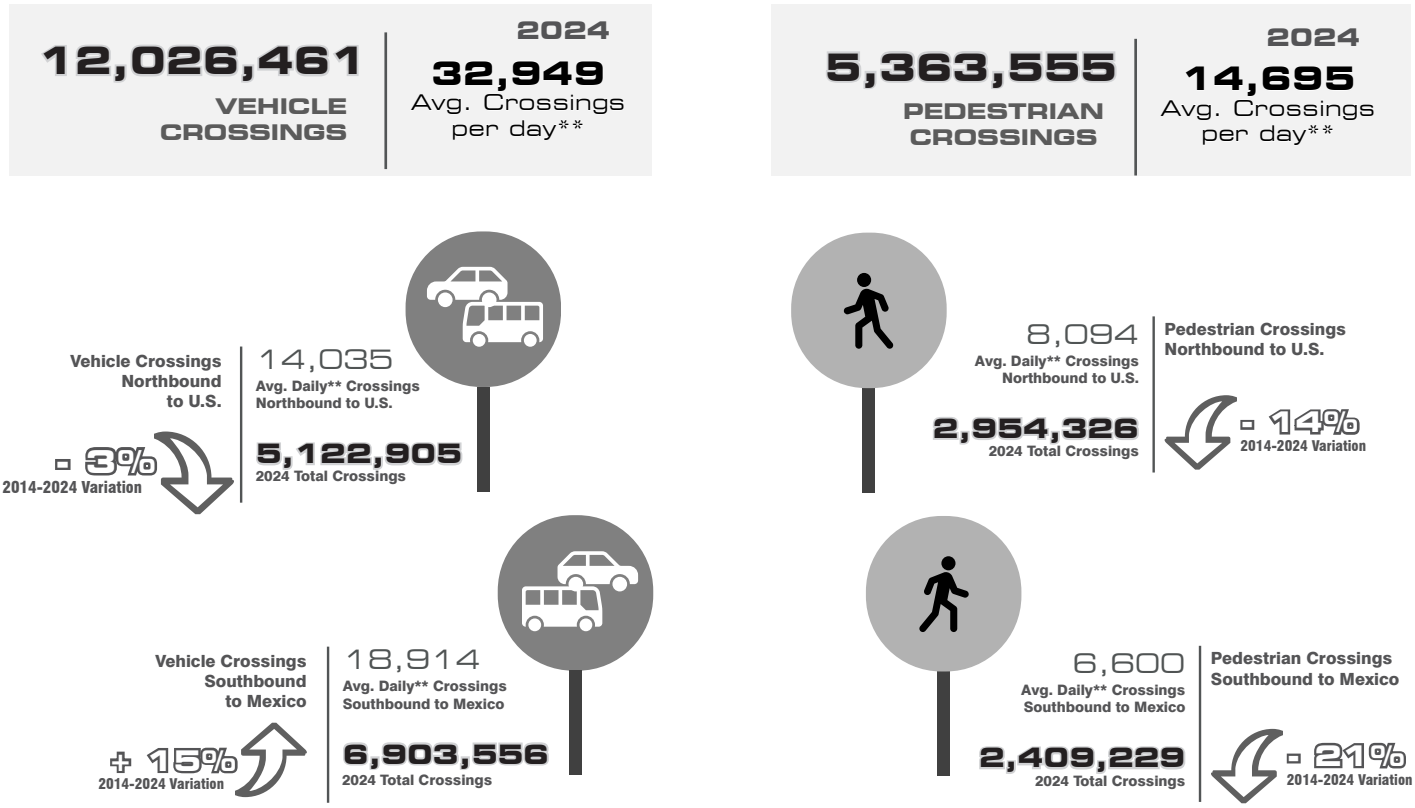


Source: City of Laredo Bridge Department, U.S. Department of Transportation: Bureau of Transportation Statistics

Chapter 4: Port Laredo's International Bridge Infrastructure

Key Elements and Data Points

Passenger vehicle crossings totaled 12,026,461, averaging 32,949 daily movements on a seven-day standard. Pedestrian crossings reached approximately 5.4 million. The data reveal divergent trends: while commercial crossings surged, pedestrian traffic declined 14 percent northbound and 21 percent southbound over the decade, reflecting shifts in cross-border mobility patterns that merit further study



Trade Dynamics

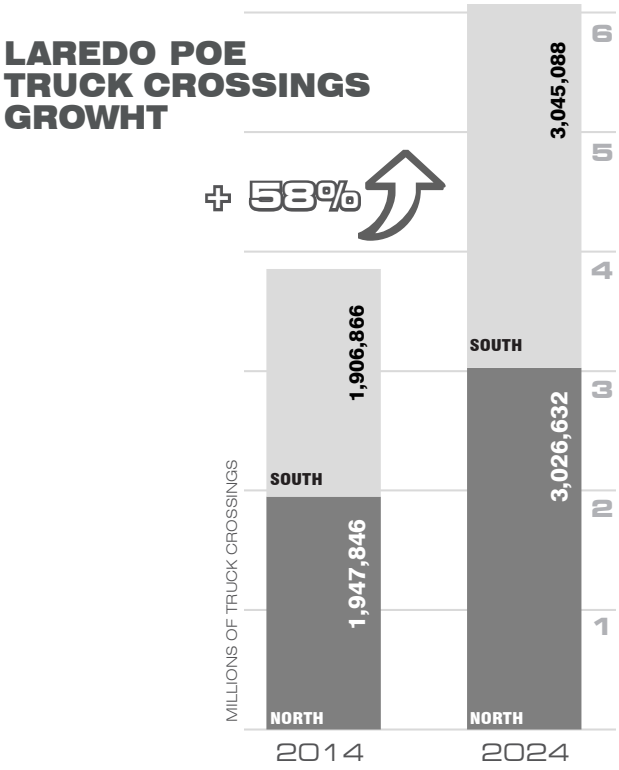
The directional balance of commercial crossings, 3,026,632 northbound versus 3,045,088 southbound, reflects the two-way nature of integrated manufacturing. Trucks move components southward for assembly and finished products northward for market, creating a near-symmetrical flow that distinguishes manufacturing trade from extractive commodity flows. This balance is a signature of genuine economic integration rather than one-directional dependency.

Source: City of Laredo Bridge Department, U.S. Department of Transportation: Bureau of Transportation Statistics

Chapter 4: Port Laredo's International Bridge Infrastructure

Broader Implications

The 58 percent growth in truck crossings over a decade occurred without proportional expansion of bridge capacity, highlighting both the efficiency gains achieved through technology and operational improvements and the approaching limits of current infrastructure. As trade volumes continue to grow, the physical constraints of bridge infrastructure, lanes, inspection bays, and approach roads will increasingly determine the throughput capacity of North American commerce



Source: City of Laredo Bridge Department, U.S. Department of Transportation: Bureau of Transportation Statistics

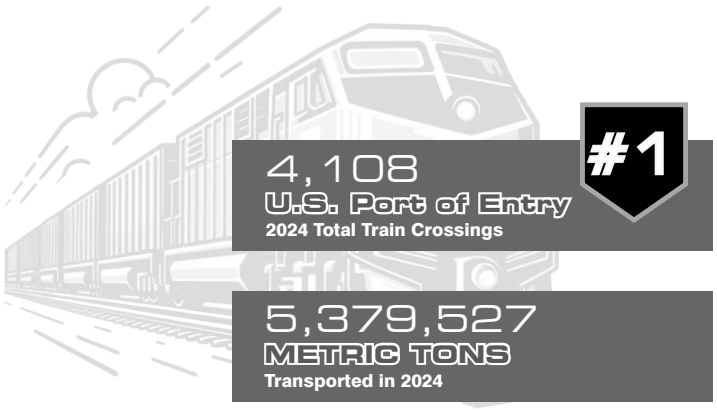
Part I : The Architecture of Integration

Trucks carry the majority of Port Laredo's trade, but they are not the whole story. The fifth edition examined the complementary rail and air cargo operations that complete Laredo's multimodal profile

Chapter 5: Rail and Air Cargo at Port Laredo

Overview

This edition explored Port Laredo's rail and air cargo infrastructure, revealing how these complementary modes round out a transportation network dominated by trucking. With 4,108 northbound train crossings in 2024 and $46.4 billion in rail trade value, Port Laredo ranks as the number one U.S. port of entry for rail crossings, handling 5.3 million metric tons of cargo by rail alone.



Key Elements and Data Points

Rail trade composition mirrors the broader pattern of automotive-sector dominance: vehicle and parts imports by rail totaled $20.8 billion, while exports totaled $3.98 billion. Beyond automotive, the rail commodity mix includes mineral products ($2.9 billion in exports), beverages and spirits ($2.9 billion in imports), plastics and rubber ($2.3 billion in exports), and computers and parts ($2.4 billion in combined trade). The ten-year trend shows resilience, with crossings recovering from fluctuations, reaching 4,108 in 2024 after peaking at 4,592 in 2020.

TOP EXPORTS

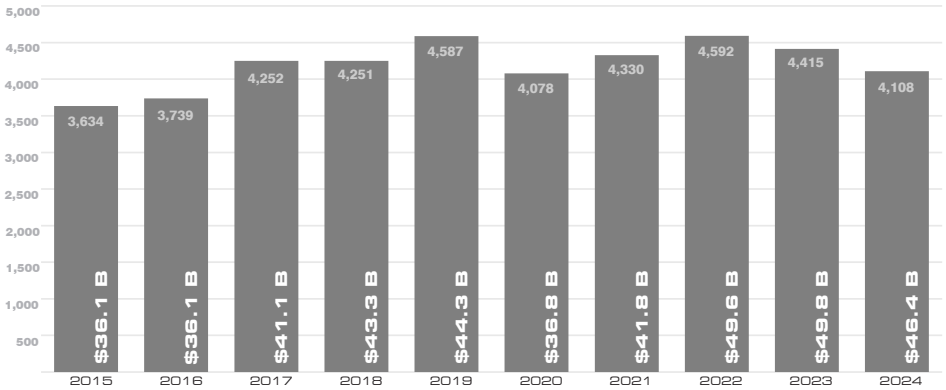
Vehicles other than Rail
$3.98 Billion

Mineral Products
$2.9 Billion

Plastics and Rubbers
$2.3 Billion

Computers and Parts
$1.8 Billion

Port Laredo Yearly Northbound Train Crossings



TOP IMPORTS

Vehicles other than Rail
$20.8 Billion

Beverages and Spirits
$2.9 Billion

Computers and Parts
$2.4 Billion

Electrical Machinery
$911 Million

Source: U.S. Census Economic Indicators Division, U.S. Department of Transportation: Bureau of Transportation Statistics
Images: Microsoft Copilot Image Generator

Chapter 5: Rail and Air Cargo at Port Laredo

Key Elements and Data Points

Air cargo at Port Laredo operates on a different scale and serves a different purpose. At $560 million in total import/export trade value and 23,625 metric tons handled in 2024, air cargo is a fraction of the port's overall operations. But it specializes in high-value, time-sensitive goods: computers and parts ($235 million in imports), vehicles and parts, electrical machinery, and measuring instruments. This specialization distinguishes air cargo from the bulk commodities characterizing rail transport.

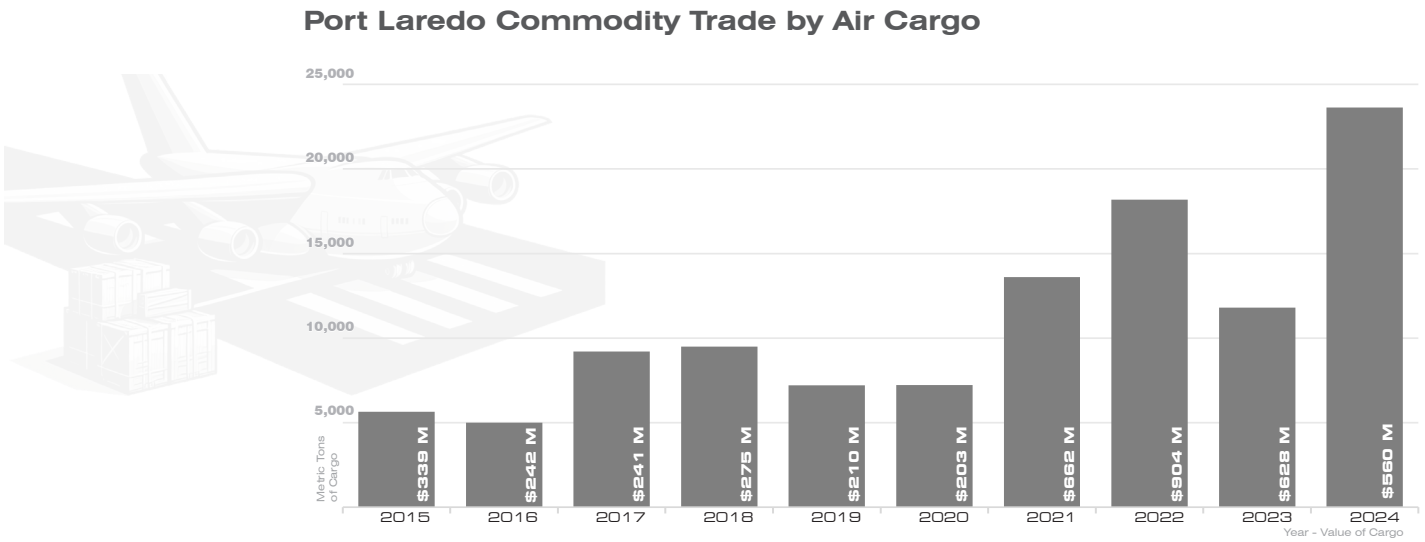
TOP EXPORTS	TOP IMPORTS
Vehicles other than Rail $36 Million	Computers and Parts $235 Million
Electrical Machinery $33 Million	Vehicles other than Rail $ 25 Million
Computers and Parts $17 Million	Electrical Machinery $ 22 Million
Measuring Instruments $3.3 Million	Measuring Instruments $ 7.9 Million

23,625 METRIC TONS
Transported Trade Cargo in 2024

$560 Million IMPORT / EXPORT
Trade Value Transported in 2024

Trade Dynamics

The decade-long trend in air cargo values reveals significant volatility, peaking at $904 million in 2022 before stabilizing at $560 million. This pattern reflects the sensitivity of high-value, time-sensitive shipments to economic cycles and the competitive dynamics of air freight markets. Rail, by contrast, shows steadier growth aligned with the expansion of manufacturing trade.

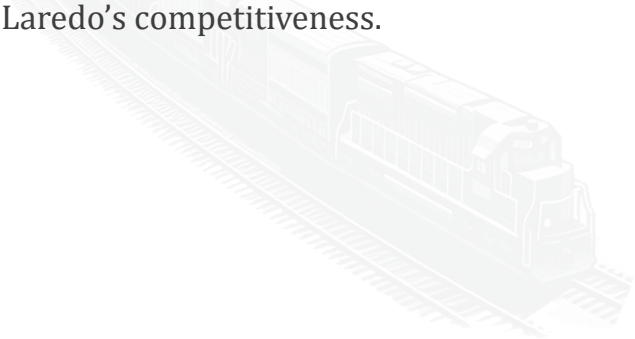


Source: U.S. Census Economic Indicators Division, U.S. Department of Transportation: Bureau of Transportation Statistics
Images: Microsoft Copilot Image Generator

Chapter 5: Rail and Air Cargo at Port Laredo

Broader Implications

Port Laredo's multimodal profile, 85.1 percent truck, 14 percent rail, 1 percent air, represents an evolved but still truck-dependent system. The rail network's capacity for bulk and heavy goods offers a potential relief valve for truck congestion, while air cargo serves the specialized niche of precision and technology goods. This edition argues that strategic investment in rail capacity and air cargo facilities could reduce bottlenecks while maintaining the speed advantages that drive Laredo's competitiveness.



Source: U.S. Census Economic Indicators Division, U.S. Department of Transportation: Bureau of Transportation Statistics
Images: Microsoft Copilot Image Generator

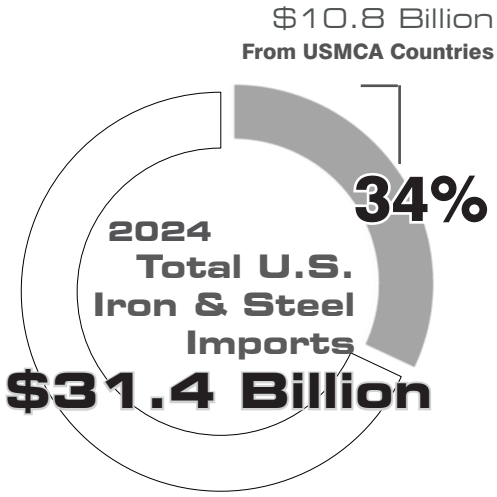
Part I : The Architecture of Integration

Having mapped the infrastructure, the sixth edition turned to a specific industrial sector, iron and steel, to trace the supply chain from raw material extraction in Mexico's western states through manufacturing in the north and export to the United States.

Chapter 6: U.S.-Mexico Iron and Steel Trade

Overview

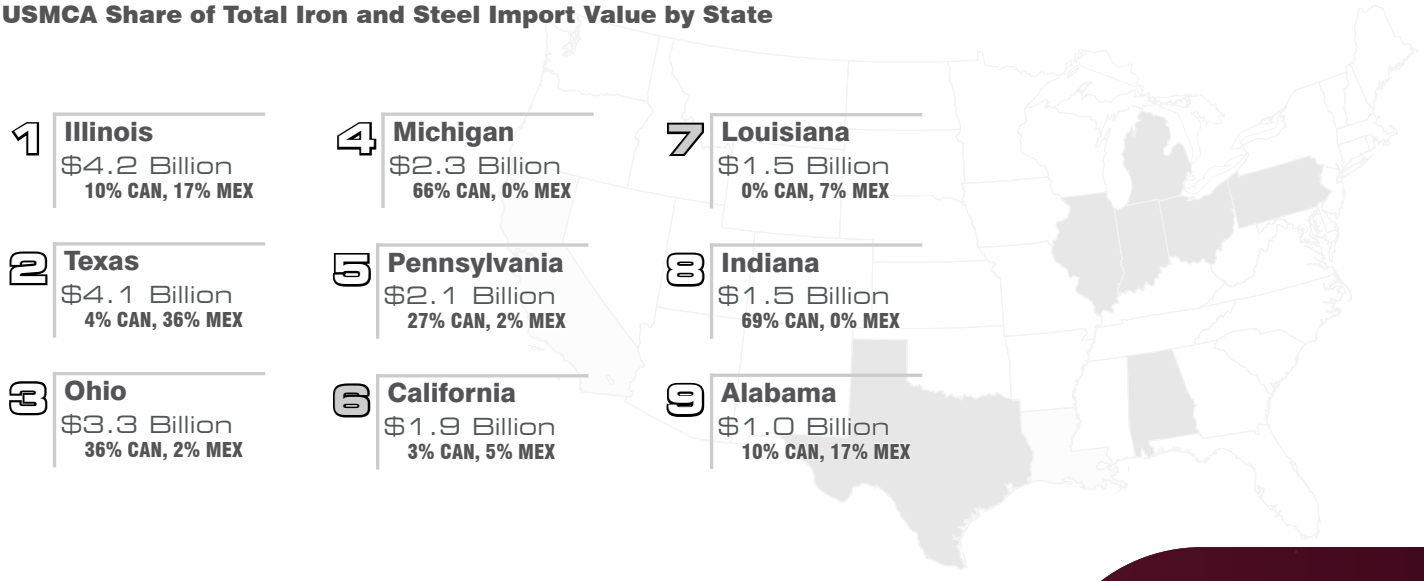
This edition examined iron and steel trade between the United States and Mexico, a sector that would become a flashpoint in subsequent months when tariffs targeted metals imports. In 2024, the U.S. imported $31.4 billion in iron and steel products, with USMCA partners Canada and Mexico supplying $10.8 billion, more than one-third of total imports. Canada led at $7.6 billion, followed by Brazil ($4.7 billion) and Mexico ($3.2 billion).



Key Elements and Data Points

State-level import patterns reveal distinct regional dependencies. Illinois leads the U.S. in iron and steel imports at $4.2 billion (10 percent from Canada, 17 percent from Mexico), followed by Texas at $4.1 billion (4 percent from Canada, 36 percent from Mexico). The contrast is instructive: Michigan and Indiana source 66 and 69 percent, respectively, of their iron and steel from Canada, while Texas relies heavily on Mexico at 36 percent. This geographic variation reflects different industrial needs and proximity to trading partners.

USMCA Share of Total Iron and Steel Import Value by State



Source: U.S. Census Economic Indicators Division, U.S.,INEGI : Banco de Información Económica

Chapter 6: U.S.-Mexico Iron and Steel Trade

Key Elements and Data Points

On the Mexican side, the iron and steel sector reveals a cross-country value chain. Six states account for 71 percent of Mexico's total iron and steel exports, with Nuevo León leading at $12.4 billion (19.4 percent of all exports), followed closely by Coahuila at $12.1 billion (19.0 percent).

The export powerhouses cluster along the northern border, while raw material extraction concentrates in the western states: Michoacán accounts for 83.5 percent of national iron ore output (398,943 metric tons), with Colima contributing the remaining 16.5 percent

Trade Dynamics

The extraction-to-export geography of Mexico's iron and steel sector illustrates the internal logistics networks that feed international trade. Iron ore is transported from Michoacán and Colima to processing facilities in Monterrey, Saltillo, and other northern manufacturing centers, where it enters global supply chains via border crossings in Texas and California.

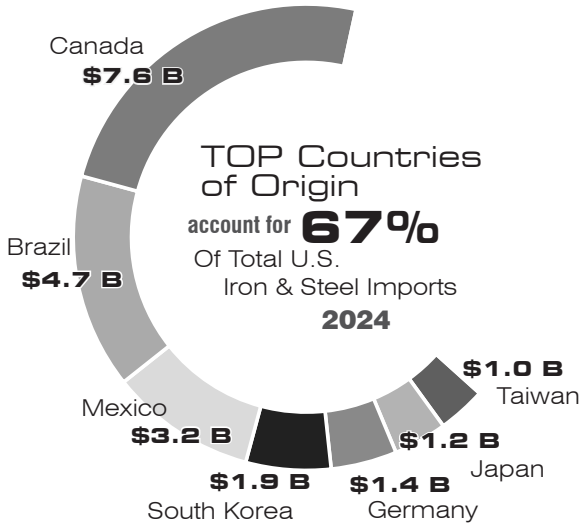
This internal value chain means that tariffs on Mexican steel do not merely affect the final product; they disrupt an entire production ecosystem spanning the Mexican interior.

Source: U.S. Census Economic Indicators Division, U.S.,INEGI : Banco de Información Económica

Chapter 6: U.S.-Mexico Iron and Steel Trade

Broader Implications

This edition's detailed mapping of iron and steel trade flows takes on particular significance in retrospect. When 25 percent tariffs on aluminum, iron, and steel from Mexico took effect in March 2025 and were escalated to 50 percent in June, the impacts fell on exactly the trade corridors and supply chains documented here. The sector analysis provides the baseline against which the tariff impact assessment would be measured.



Source: U.S. Census Economic Indicators Division, U.S.,INEGI : Banco de Información Económica

Part II: The Disruption

Six months of documenting the architecture of North American trade integration established a baseline. Then the ground shifted. The seventh edition captured what happened when three successive tariff announcements tested the resilience of supply chains built over three decades.

Chapter 7: The Impact of 2025 Tariffs on North American Trade

Overview

This edition delivered the year's most consequential analysis: a sector-by-sector, port-by-port assessment of how three tariff announcements in 2025 reshaped North American trade patterns. On January 31, a 25 percent tariff was imposed on all products from Mexico, with USMCA exemptions providing partial relief. On March 25, a 25 percent tariff was specifically targeted at vehicles and vehicle parts. On June 2, tariffs on aluminum, iron, and steel from Mexico escalated to 50 percent. Each announcement impacted supply chains differently, while USMCA exemptions created important but complex exceptions.

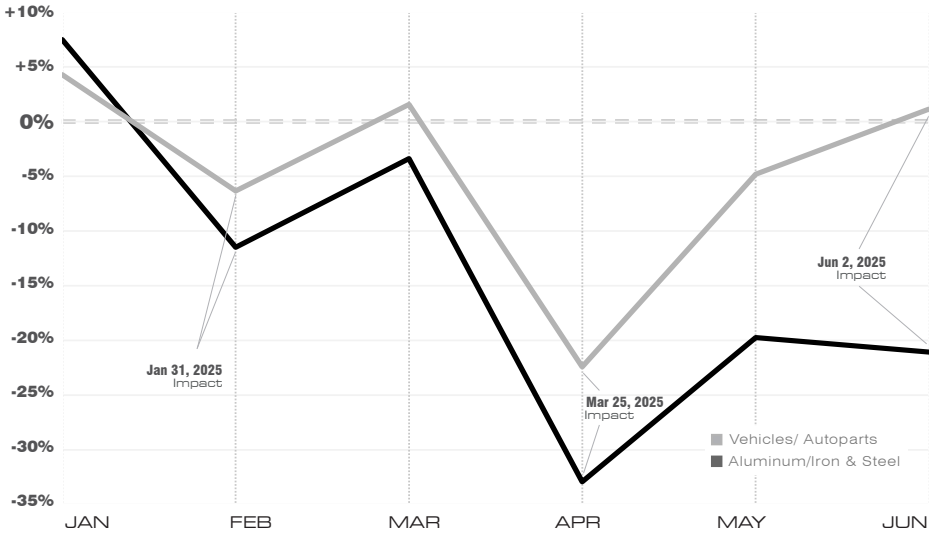
Jan 31, 2025
25 % Tariff
All Products from Mexico
USMCA exemptions

Mar 25, 2025
25 % Tariff
Vehicles and Parts
from Mexico
USMCA exemptions

Jun 2, 2025
50 % Tariff
Steel & Aluminum
from Mexico
USMCA exemptions

Key Elements and Data Points

2025 Tariffs Impact on
Passenger Vehicles, Autoparts, Aluminum, Iron & Steel
2024-2025 % Change on Imports from Mexico



The aggregate impact is stark. Comparing January through June 2024 with the same period in 2025, U.S. imports of vehicles and auto parts from Mexico declined 6.1 percent, a $4.1 billion reduction. Aluminum, iron, and steel imports declined by 13.6 percent, representing an $873 million decline. Combined, nearly $5 billion in trade value evaporated in the first half of the year.

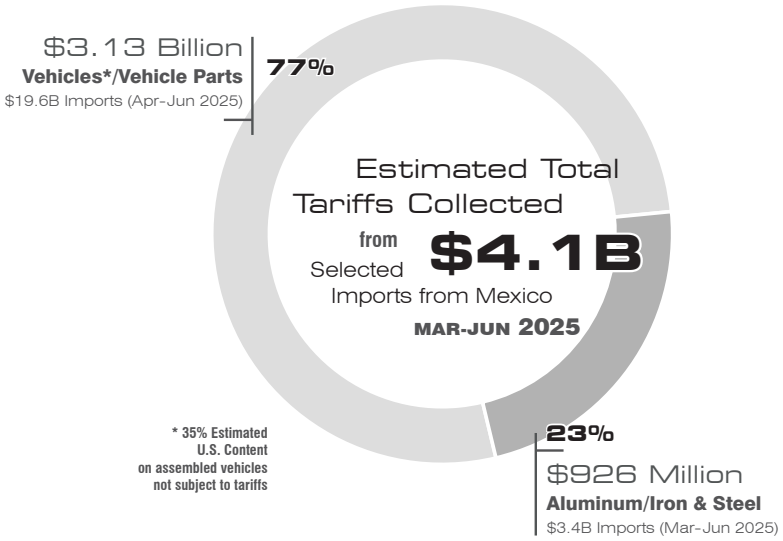
Source: U.S. Census Economic Indicators Division, IEEPA (Jan 3,1, 2025): White House Fact Sheet – President Donald J. Trump Imposes Tariffs on Imports from Canada, Mexico, and China. Proclamation 10908 (Apr 3, 2025): Section 232 Automobiles & Parts framework. Proclamation 10947 (Jun 9, 2025): Section 232 Aluminum/Steel increased to 50%.
USTR: Report To Congress On The Operation Of The United States-Mexico-Canada Agreement With Respect To Trade In Automotive Goods (July 2024)

Chapter 7: The Impact of 2025 Tariffs on North American Trade

Key Elements and Data Points

The estimated tariff revenue collected from selected imports reached $4.1 billion during the period, with 77 percent ($3.13 billion) from the trade in vehicles and vehicle parts and 23 percent ($926 million) from aluminum, iron, and steel. The analysis estimates that 35 percent of U.S. content in assembled vehicles was not subject to tariffs, reflecting the USMCA exemption structure. Nevertheless, trade declines exceeded revenue gains, resulting in a net loss of economic activity.

Estimated Tariff Revenue

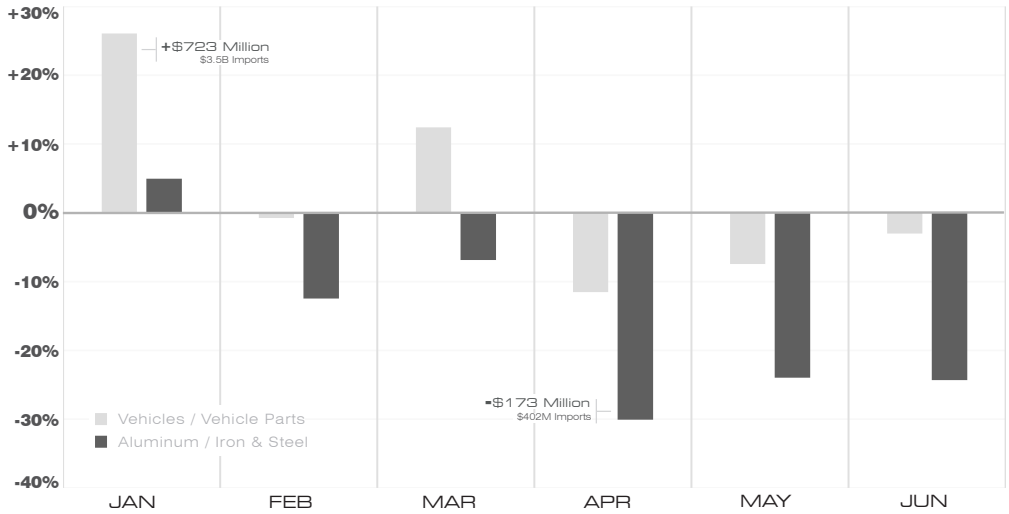


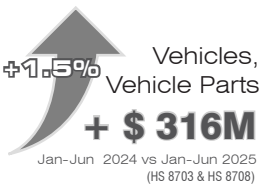
Trade Dynamics

Through Port Laredo, the contrasting sector responses become visible. Vehicle and vehicle parts imports actually increased by $316 million (1.5 percent), driven by strong January and March performance that preceded the full impact of tariff implementation. Laredo processed $3.5 billion in vehicle-related imports. However, aluminum, iron, and steel imports through Laredo declined sharply, falling 15.4 percent, representing a $503 million loss relative to a base of $402 million in monthly average imports.

2025 Tariffs Impact on Passenger Vehicles, Autoparts, Aluminum, Iron & Steel

2024-2025 % Change on Imports from Mexico thorugh Laredo Port of Entry



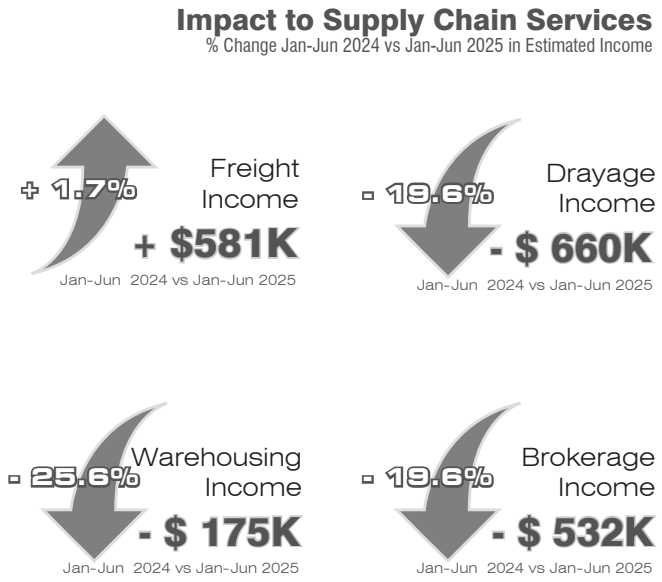


Source: U.S. Census Economic Indicators Division, IEEPA (Jan 3,1, 2025): White House Fact Sheet – President Donald J. Trump Imposes Tariffs on Imports from Canada, Mexico, and China. Proclamation 10908 (Apr 3, 2025): Section 232 Automobiles & Parts framework. Proclamation 10947 (Jun 9, 2025): Section 232 Aluminum/Steel increased to 50%.
USTR: Report To Congress On The Operation Of The United States-Mexico-Canada Agreement With Respect To Trade In Automotive Goods (July 2024)

Chapter 7: The Impact of 2025 Tariffs on North American Trade

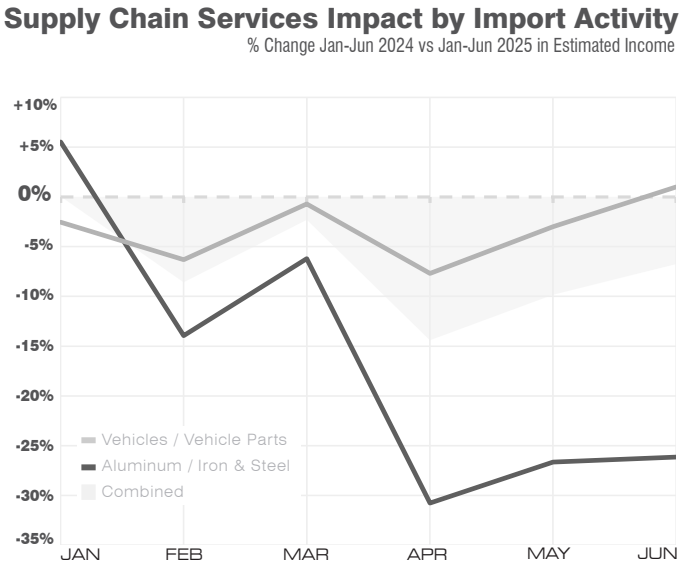
Trade Dynamics

The supply chain services analysis converts declines in trade into community-level economic impacts. Using industry-standard logistics rates and typical load configurations for cross-border trade, the $503 million metals import decline through Port Laredo translates to approximately $1.4 million in lost supply chain services revenue: freight income rose modestly (1.7 percent, +$581,000) due to vehicle trade resilience, but drayage income fell 19.6 percent (-$660,000), warehousing income dropped 25.6 percent (-$175,000), and brokerage income declined 19.6 percent (-$532,000). The combined services drop was sharpest in April, immediately following the vehicle tariff announcement.



Broader Implications

The analysis demonstrates that tariffs on integrated supply chains produce effects that cascade far beyond the targeted goods. A tariff on Mexican steel does not simply raise the price of steel; it reduces drayage runs between the bridge and warehouses, cuts brokerage transaction volumes, diminishes warehousing occupancy, and contracts freight forwarding activity throughout the Los Dos Laredos corridor. The decline in these ancillary services inflicts economic harm on communities, small businesses, and workers who may have no direct connection to the targeted commodity.



Perhaps most significantly, the analysis reveals that tariff revenue gains did not compensate for trade value losses. The $5 billion decline in trade activity against $4.1 billion in collected revenue suggests a net contraction in economic output, even before accounting for the multiplier effects of reduced supply chain services, inventory disruptions, and production schedule adjustments across the manufacturing network.

Source: U.S. Census Economic Indicators Division, IEEPA (Jan 3,1, 2025): White House Fact Sheet – President Donald J. Trump Imposes Tariffs on Imports from Canada, Mexico, and China. Proclamation 10908 (Apr 3, 2025): Section 232 Automobiles & Parts framework. Proclamation 10947 (Jun 9, 2025): Section 232 Aluminum/Steel increased to 50%.
USTR: Report To Congress On The Operation Of The United States-Mexico-Canada Agreement With Respect To Trade In Automotive Goods (July 2024)

Part III: The Institutional Response

The tariff impacts documented in the seventh edition made the case that North American trade infrastructure suffers from institutional gaps, not just in physical capacity, but in governance, digital systems, and industrial coordination. The final three editions of 2025 shift from diagnosis to prescription, presenting concrete proposals developed through TCBEED's research and timed to the upcoming July 2026 USMCA joint review window.

Chapter 8: The Binational Customs Agency

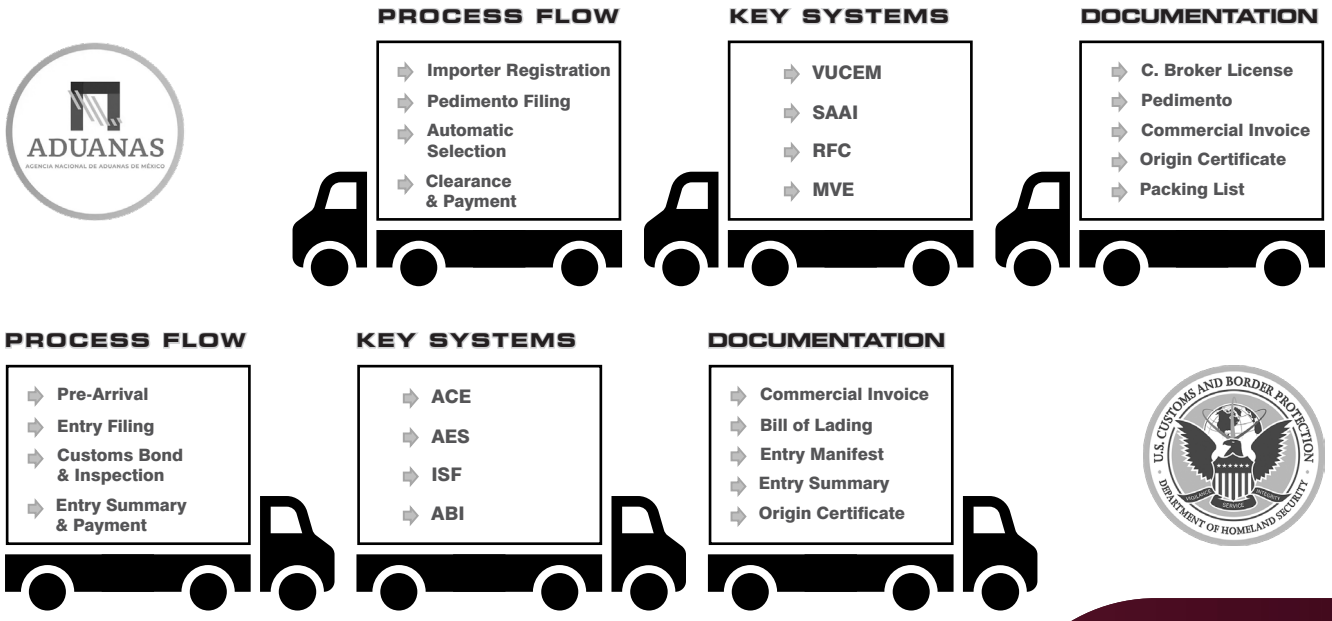
Overview

This edition presented a proposal for a Binational Customs Agency (BCA) jointly managed by the United States and Mexico. The core problem: despite $840 billion in annual bilateral trade and 6.1 million cargo truck crossings, the two countries operate fundamentally disconnected customs systems. U.S. Customs and Border Protection focuses on security and enforcement through the Automated Commercial Environment (ACE), while Mexico's National Customs Agency (ANAM) prioritizes revenue collection through VUCEM. These parallel systems cannot communicate, resulting in duplicate inspections, fragmented documentation requirements, and inconsistent regulatory interpretation.

Trade Impact From Separate Customs Operations

1. **Non-Interoperable IT Systems**
   ACE and VUCEM cannot communicate; no real-time data sharing between CBP and SAT/ANAM
2. **Duplicate Documentation**
   Traders must submit similar data separately to US (ACE) and Mexico (VUCEM) systems
3. **Security Screening Delays**
   Random CBP security screenings and Texas DPS inspections
4. **Complex Compliance Requirements**
   New MVE requirement (Dec 2024) requires pre-clearance value declarations with supporting docs
5. **Inconsistent Regulatory Interpretation**
   Different border posts interpret regulations inconsistently; standards enforcement varies
6. **Limited Staffing**
   Insufficient CBP officers; reduced processing capacity nights/weekends

Current U.S. & Mexico Customs Operations



Source: U.S.-Mexico Foundation: The Binational Customs Agency - A vision for U.S.-Mexico joint customs operations
Images: Microsoft Copilot Image Generator

Part III: The Institutional Response

Chapter 8: The Binational Customs Agency

Key Elements and Data Points

The costs of maintaining separate systems are quantifiable. Traders must submit similar data separately to the U.S. (ACE) and Mexican (VUCEM) systems. Random CBP security screenings and Texas DPS inspections reduce processing capacity. Insufficient CBP staffing, particularly on nights and weekends, creates bottlenecks. The new MVE requirement, effective December 2024, requires pre-clearance value declarations accompanied by supporting documentation. Estimated costs per truck range from $150 to $200 per hour for operating and inventory carrying during duplicate inspections, plus $300 to $900 per day for waiting and demurrage charges.

ESTIMATED COSTS OF DELAYS PER TRUCK

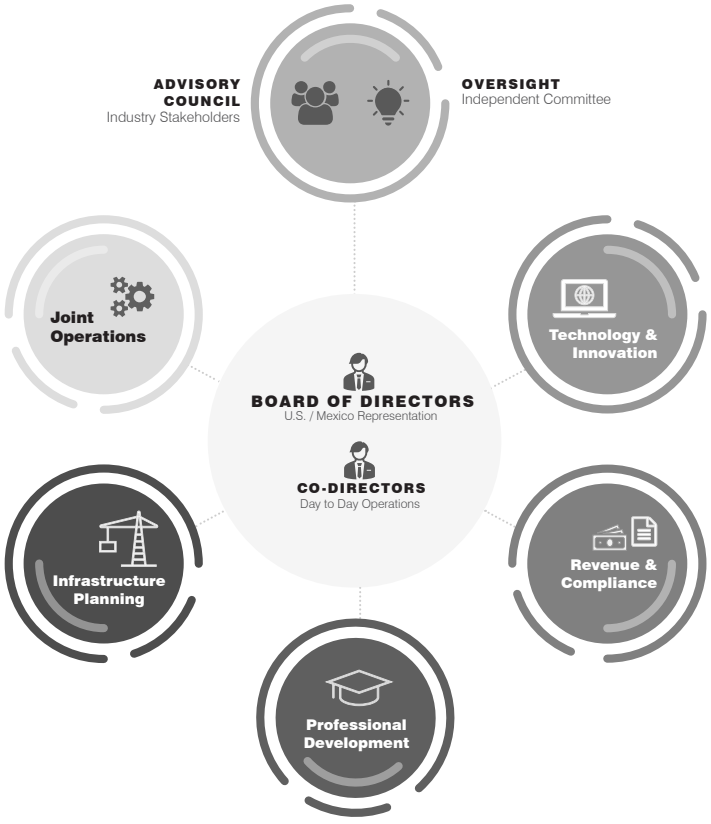
Operating & Duplicate Inspection
$150 - $200 / Hour

Inventory Carrying Waiting, Demurrage
$300 - $900 / Day

Trade Dynamics

The BCA proposal draws on proven binational governance models: the International Boundary and Water Commission (IBWC), which has managed shared water resources since 1944, and the North American Development Bank (NADBank), which operates on a joint-funding, equal-ownership structure. The proposed agency would feature a unified operational framework with a Board of Directors providing U.S./Mexico representation, Co-Directors managing day-to-day operations, and specialized divisions for Joint Operations, Technology and Innovation, Revenue and Compliance, Infrastructure Planning, and Professional Development. An Advisory Council of industry stakeholders and an independent Oversight Committee would provide accountability.

BCA UNITED OPERATIONAL FRAMEWORK



Source: U.S.-Mexico Foundation: The Binational Customs Agency - A vision for U.S.-Mexico joint customs operations
Images: Microsoft Copilot Image Generator

Chapter 8: The Binational Customs Agency

Broader Implications

The BCA proposal addresses what this edition calls the most fundamental inefficiency in North American trade: the fact that two countries with $840 billion in annual commerce operate customs systems that cannot communicate with each other. A unified digital platform enabling real-time data sharing, automated risk assessment, and blockchain-secured cargo tracking could achieve 30 to 50 percent faster clearance while enhancing security cooperation against transnational threats. The proposal targets the July 2026 USMCA review window as a strategic opportunity to advance this institutional innovation.

ELIMINATING THE "DIGITAL WALL"

Today, ACE anc VUCEM cannot communicate. System failures on onse side paralyze crossings on both. The BCA creates a unified digital platform enabling real-time data sharing, automated risk assessment, and blockchain-secured cargo tracking.

$840B
BILATERAL TRADE (2024)

6.1M
CARGO TRUCKS ANNUALY

30-50%
FASTER CLEARANCE

2026
USMCA REVIEW WINDOW

Single Data Submittion
One filling for both nations

Interoperable IT Systems
Real-time information exchange

Joint Recognition
Mutual trusted trader programs

Blockchain Tracking
Immutable chain-of-custody

READ THE FULL PROPOSAL
https://texascenter.tamiu.edu/research-nai.shtml

STRATEGIC WINDOW
JULY 2026
USMCA Joint Review and Renegotiation Timeline

Source: U.S.-Mexico Foundation: The Binational Customs Agency - A vision for U.S.-Mexico joint customs operations
Images: Microsoft Copilot Image Generator

Part III: The Institutional Response

The Binational Customs Agency addresses the operational gap at the border. The ninth edition expanded the scope to North America's broader digital fragmentation, the absence of interoperable systems across the entire continent.

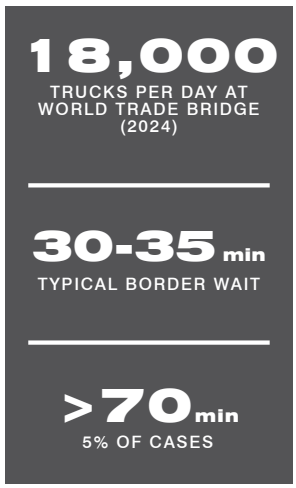
Chapter 9:
The North American Digital Infrastructure Coordination Initiative (NADICI)

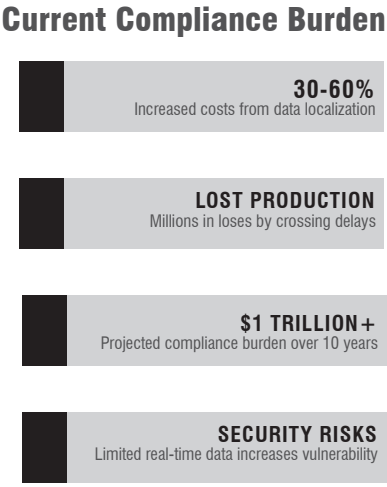
Overview

This edition introduced the North American Digital Infrastructure Coordination Initiative, a continental framework for digital integration and technological sovereignty. Despite $1.93 trillion in annual trade, North America operates on three incompatible digital systems for customs, standards, data, and trade platforms. This fragmentation, which the proposal terms the "Digital Wall", costs billions in compliance, creates unpredictable delays, and leaves the continent vulnerable while competitors like the European Union and ASEAN integrate their digital trade infrastructure.

Key Elements and Data Points

The scale of the problem is measured in daily operations: 18,000 trucks per day cross the World Trade Bridge, with typical border wait times of 30 to 35 minutes and 5 percent of cases exceeding 70 minutes. Data localization requirements increase costs by 30 to 60 percent. The projected compliance burden exceeds $1 trillion over ten years. Limited real-time data sharing increases security vulnerabilities.



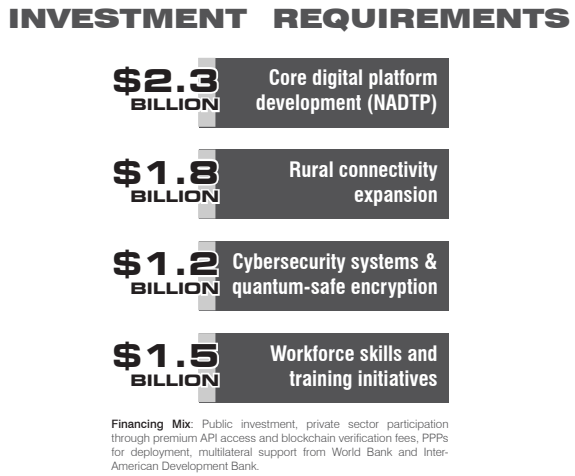


Source: The North American Digital Infrastructure Coordination Initiative: Continental Framework For Digital Integration and Technological Sovereignty

Chapter 9:
The North American Digital Infrastructure Coordination Initiative (NADICI)

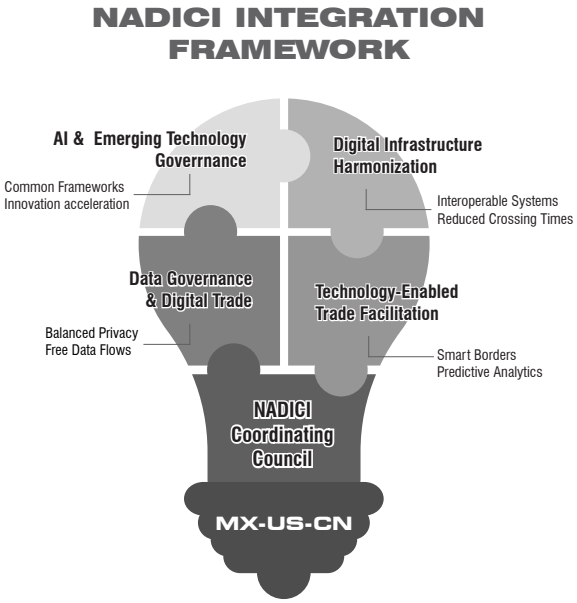
Key Elements and Data Points

The investment framework is substantial but targeted. NADICI proposes $6.8 billion over five years, allocated across core digital platform development ($2.3 billion), rural connectivity expansion ($1.8 billion), cybersecurity and quantum-safe encryption ($1.2 billion), and workforce skills and training ($1.5 billion). The financing model combines public investment with private-sector participation through premium API access, blockchain verification fees, public-private partnerships, and multilateral support from the World Bank and the Inter-American Development Bank.



Trade Dynamics

NADICI's integration framework addressed four critical areas: AI and emerging technologies (common frameworks, innovation acceleration, reduced crossing times); digital infrastructure (interoperable systems, smart borders, predictive analytics); data governance and digital trade (balanced privacy, free data flows); and technology-enabled trade facilitation. The framework draws lessons from competing integration efforts: China's Digital Silk Road, spanning 140+ countries; ASEAN's $6.4 billion digital integration, which generates cost savings and processes millions of documents annually; and the European Union's €415 billion digital single market, spanning 27 nations.



Source: The North American Digital Infrastructure Coordination Initiative: Continental Framework For Digital Integration and Technological Sovereignty

Chapter 9:
The North American Digital Infrastructure Coordination Initiative (NADICI)

Broader Implications

NADICI recognizes that North American competitiveness in the 21st century depends not only on physical infrastructure, bridges, rail lines, and ports, but also on digital infrastructure capable of matching the speed and complexity of modern supply chains.

The four-phase implementation roadmap moves from foundation (governance structures, pilot programs, blockchain certificates of origin) through system integration (connecting ACE, CARM, and VUCEM) to full operations (90 percent paperless trade) and ultimately global leadership (North America as the reference standard for digital trade facilitation).

ELIMINATING THE "DIGITAL WALL"

Today, our trade systems cannot communicate with each other. A system failure on any side can paralyze crossings on both. A unified digital platform enabling real-time data sharing, automated risk assessment, and blockchain-secured cargo tracking would reduce trade costs, increase efficiency, and greatly improve security.

READ THE FULL PROPOSAL
https://texascenter.tamiu.edu/research-nai.shtml

STRATEGIC WINDOW
JULY 2026
USMCA Joint Review and Renegotiation Timeline

IMPLEMENTATION ROADMAP

PHASE 1
FOUNDATION
- Establish governance structures
- Launch pilot programs:
- Deploy blockchain certificates of origin
- Form Trilateral Digital Task Force

PHASE 2
SYSTEM INTEGRATION
- Connect ACE, CARM, and VUCEM
- Implement shared AI governance frameworks
- Deploy Trusted Data Corridors
- Scale successful pilots

PHASE 3
FULL OPERATIONS
- Extend platform deployment
- Achieve 90% paperless trade
- Complete comprehensive AI framework
- Deploy Continental Supply Chain Platform

PHASE 4
GLOBAL LEADERSHIP
- North America as global reference
- Shape international standards
- Continuous innovation
- Benefits reaching tens of billions of dollars

Source: The North American Digital Infrastructure Coordination Initiative: Continental Framework For Digital Integration and Technological Sovereignty

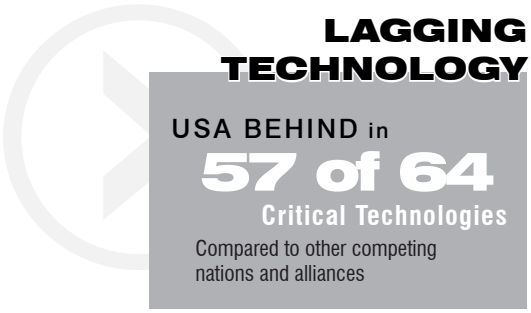
Part III: The Institutional Response

Digital infrastructure enables efficient trade operations. But North America also faces a strategic challenge that extends beyond customs and data: the need for coordinated industrial policy across strategic sectors. The tenth edition addressed this gap.

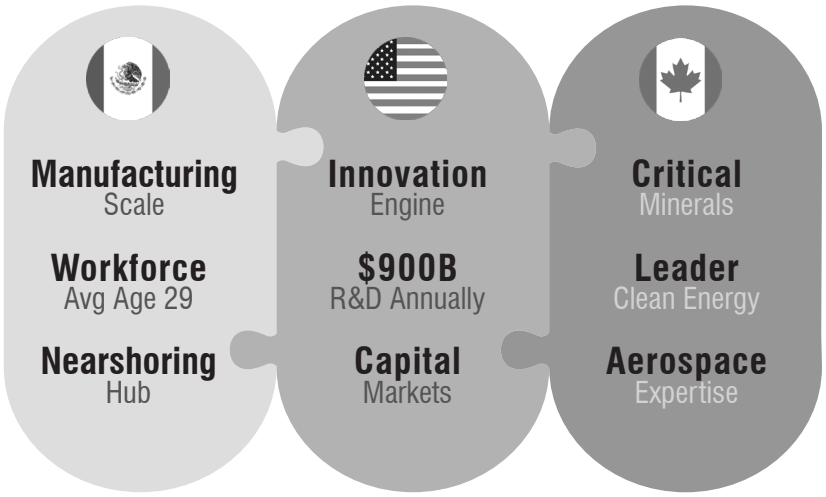
Chapter 10: The North American Industrial Coordination Council (NAICC)

Overview

The final edition of the 2025 series proposes the most ambitious institutional framework: a North American Industrial Coordination Council designed to coordinate trilateral industrial strategy across strategic sectors. The premise is direct: the United States lags behind strategic competitors in 57 of 64 critical technologies essential for future economic and military leadership.



USMCA Complementary Strengths



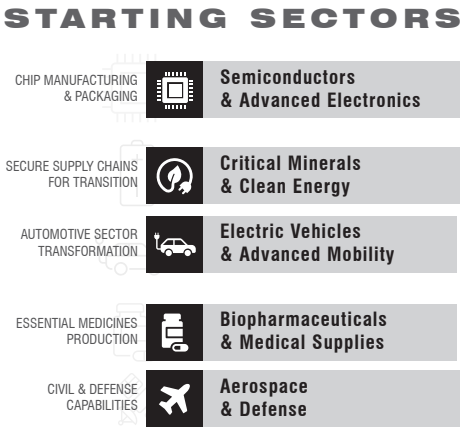
Canada and Mexico possess complementary strengths, manufacturing scale, critical minerals, clean energy capacity, a young workforce, and nearshoring infrastructure that could help close this gap, but only if coordinated deliberately rather than left to compete against each other.

Source: Toward a North American Industrial Strategy: The Case For A North American Industrial Coordination Council (NAICC)

Chapter 10: The North American Industrial Coordination Council (NAICC)

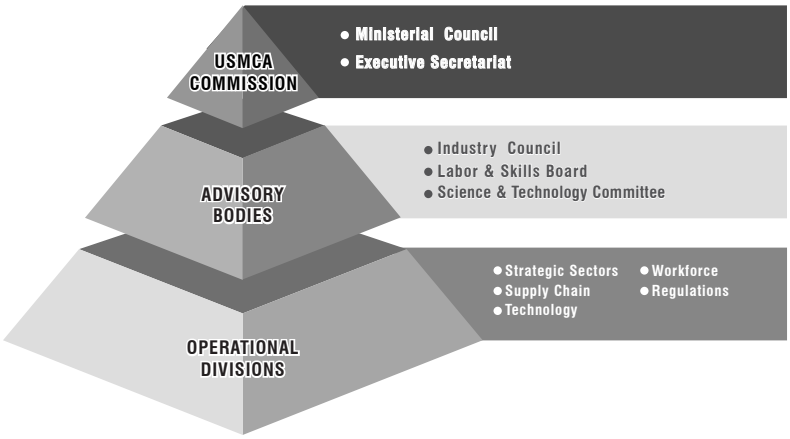
Key Elements and Data Points

The NAICC proposal identifies five initial sectors for coordination: chip manufacturing and advanced electronics packaging; critical minerals and clean energy supply chains; electric vehicles and advanced mobility; biopharmaceuticals and medical supplies; and aerospace and defense. Each sector was selected because it combines strategic importance, existing trilateral trade flows, and complementary national capabilities that could generate greater combined output than the sum of separate national efforts.



NAICC ORGANIZATIONAL STRUCTURE

The organizational structure draws on successful multilateral models but is tailored to North American integration. A three-tiered governance system would include a Ministerial Council and USMCA Executive Secretariat at the top, operational divisions managing strategic sectors, supply chains, workforce development, technology integration, and regulations, and advisory bodies incorporating industry, labor, and science perspectives. Decisions would be made by consensus, with sector-specific work groups handling technical coordination.



NAICC Structure Key Features

- Trilateral Governance
- Sector Specific Work Groups
- Consensus Decision-Making
- Private Sector Integration

Source: Toward a North American Industrial Strategy: The Case For A North American Industrial Coordination Council (NAICC)

Chapter 10: The North American Industrial Coordination Council (NAICC)

Trade Dynamics

The proposal addresses a specific failure of the current USMCA framework: while the agreement liberalized trade, it did not create mechanisms for positive industrial coordination. The absence of a trilateral mechanism for sector coordination results in competing national subsidies without a regional strategy, duplicated investments in the same sectors, exposed supply chain vulnerabilities, and policies such as IRA EV credits that exclude vehicles assembled in Mexico despite their North American content. NAICC would convert these fragmented approaches into coordinated continental strategies.

FRAGMENTED INDUSTRIAL APPROACH CHALLENGES

- IRA EV Credits Exclude Vehicles Assembled in Mexico
- Duplicated Investments in same sectors
- Exposed Supply Chain vulnerabilities
- No Trilateral Mechanism for Sector Coordination
- Competing National Subsidies Without Regional Strategy

Broader Implications

NAICC represents the logical endpoint of the year's analytical arc. If the first six editions demonstrated that North American trade integration is deep, geographically concentrated, and structurally significant, and the seventh edition demonstrated that this integration is vulnerable to unilateral policy disruption, then the institutional proposals in editions eight through ten offer a path forward. The Binational Customs Agency addresses operational efficiency at the border. NADICI addresses digital infrastructure across the continent. NAICC addresses the strategic question of whether North America can coordinate its industrial capabilities to compete effectively as a region in a world increasingly organized around economic blocs.

THE BENEFITS

FOR BUSINESSES
Streamlined Compliance, Continental Market Access, Coordinated Investment

FOR WORKERS
Job Creation, Skills Recognition, Mobility Opportunities

FOR GOVERNMENTS
Enhanced Security Coordination, Regulatory Alignment, Policy Coordination

FOR CITIZENS
Balanced Wealth Creation Across The Continent, Reduced Dependence On Extra-Regional Supply Chains, Stronger Regional Middle Class

IMPLEMENTATION ROADMAP

FOUNDATION	INTEGRATION	FULL OPERATION
PHASE 1	PHASE 2	PHASE 3

READ THE FULL PROPOSAL
https://texascenter.tamiu.edu/research-nai.shtml

STRATEGIC WINDOW
JULY 2026
USMCA Joint Review and Renegotiation Timeline

Source: Toward a North American Industrial Strategy: The Case For A North American Industrial Coordination Council (NAICC)

Conclusion:

From Architecture to Agency

The ten editions of the 2025 Crossing Paths compilation trace a deliberate arc. They begin by documenting what North American trade integration has built: a $1.6 trillion economic relationship, a $340 billion gateway at Port Laredo, supply chains in which automotive components cross the border eight times before reaching a showroom, and infrastructure handling 23 million bridge crossings annually. This is not a natural phenomenon. It is the product of thirty years of policy decisions, infrastructure investments, workforce development, and business strategy.

The year's analysis then documents what happened when that architecture was tested. Three tariff announcements between January and June 2025 disrupted trade flows across two of the most integrated sectors, automotive and metals, reducing bilateral trade by nearly $5 billion in six months. The impacts extended beyond commodity values into the supply chain services economy, contracting drayage, warehousing, brokerage, and freight activity across the Los Dos Laredos corridor. The tariff analysis demonstrated that the costs of disruption exceeded the revenue from tariff collection, producing a net contraction in economic activity.

The final three editions respond to this disruption not with alarm but with institutional design. The Binational Customs Agency proposes to eliminate the operational disconnect between U.S. and Mexican customs systems that adds cost and friction to every one of the 6.1 million annual truck crossings. NADICI proposes to build the digital infrastructure required for a continent generating $1.93 trillion in annual trade to operate with the efficiency and security that modern supply chains demand. The North American Industrial Coordination Council proposes to address the strategic gap, the absence of a mechanism for the three USMCA nations to coordinate their industrial capabilities against competitors that increasingly organize their economies along regional lines.

These three proposals share a common premise: that the era of relying solely on tariff liberalization to drive North American integration has ended. The trade infrastructure built under NAFTA and USMCA is extraordinary, but it lacks the institutional capacity to manage disruptions, coordinate strategy, or adapt to an increasingly global economy shaped by digital systems, industrial policy, and geopolitical competition. The July 2026 USMCA joint review provides a natural window for advancing institutional reforms.

Conclusion:

Key Themes Across 2025

Several cross-cutting themes emerge from the year's analysis. First, concentration and vulnerability are two sides of the same coin. Port Laredo's dominance as the top U.S. port of entry reflects extraordinary logistical efficiency, but it also means that 40 percent of U.S.-Mexico trade flows through a single gateway. The automotive sector's deep cross-border integration enables world-class manufacturing competitiveness, but it also means that tariffs on components disrupt production systems across multiple states and countries. Concentration generates efficiency; it also demands institutional safeguards.

Second, data-driven analysis reveals impacts that aggregate statistics conceal. The tariff analysis's innovation was not in reporting trade declines; those numbers were publicly available, but in tracing how a $503 million decline in metals imports through Port Laredo translated into specific reductions in drayage income, warehousing activity, and brokerage revenue. This granular approach demonstrates that trade policy affects real economic actors in measurable ways, providing information essential for policymakers, community leaders, and business operators.

Third, physical and digital infrastructure must evolve together. Port Laredo's bridge system handles 19,461 truck crossings per day on infrastructure that has not expanded proportionally to demand. Simultaneously, the customs systems on both sides of the border cannot exchange data in real time. Building additional bridge lanes without modernizing digital processing would result in longer queues at the inspection station. Modernizing digital systems without expanding physical capacity would produce faster processing in congested approach roads. The two investments must proceed in tandem.

Fourth, North American competitiveness increasingly depends on institutional capacity rather than on market access alone. The United States lags behind strategic competitors in 57 of 64 critical technologies. Canada possesses critical mineral reserves essential for advanced manufacturing. Mexico offers manufacturing scale, a young workforce, and proximity to the world's largest consumer market.

Each nation's assets are significant in themselves; when coordinated deliberately, they constitute one of the world's most formidable economic combinations. But deliberate coordination requires institutions that do not yet exist.

Conclusion:

Looking Forward

The 2025 edition of Crossing Paths concludes at a moment of consequence. The USMCA joint review scheduled for July 2026 offers the most significant opportunity in a generation to update the institutional framework governing North American trade. The three proposals presented in this compilation, the BCA, NADICI, and NAICC, are designed to be actionable within that review process, offering concrete institutional designs rather than abstract aspirations.

The work of documenting North American trade dynamics continues. Each edition adds evidence to the case that this trade relationship, the largest trilateral commerce in the world, deserves institutional architecture commensurate with its scale and significance. Through data-driven storytelling, Crossing Paths will continue to highlight the paths these nations share and the institutional choices that will determine whether those paths lead to shared prosperity or fragmented competition.

The data is clear. The architecture is documented. The vulnerabilities are measured. The proposals are on the table. What remains is the collective resolve to build institutions worthy of the economic integration North America has already achieved.

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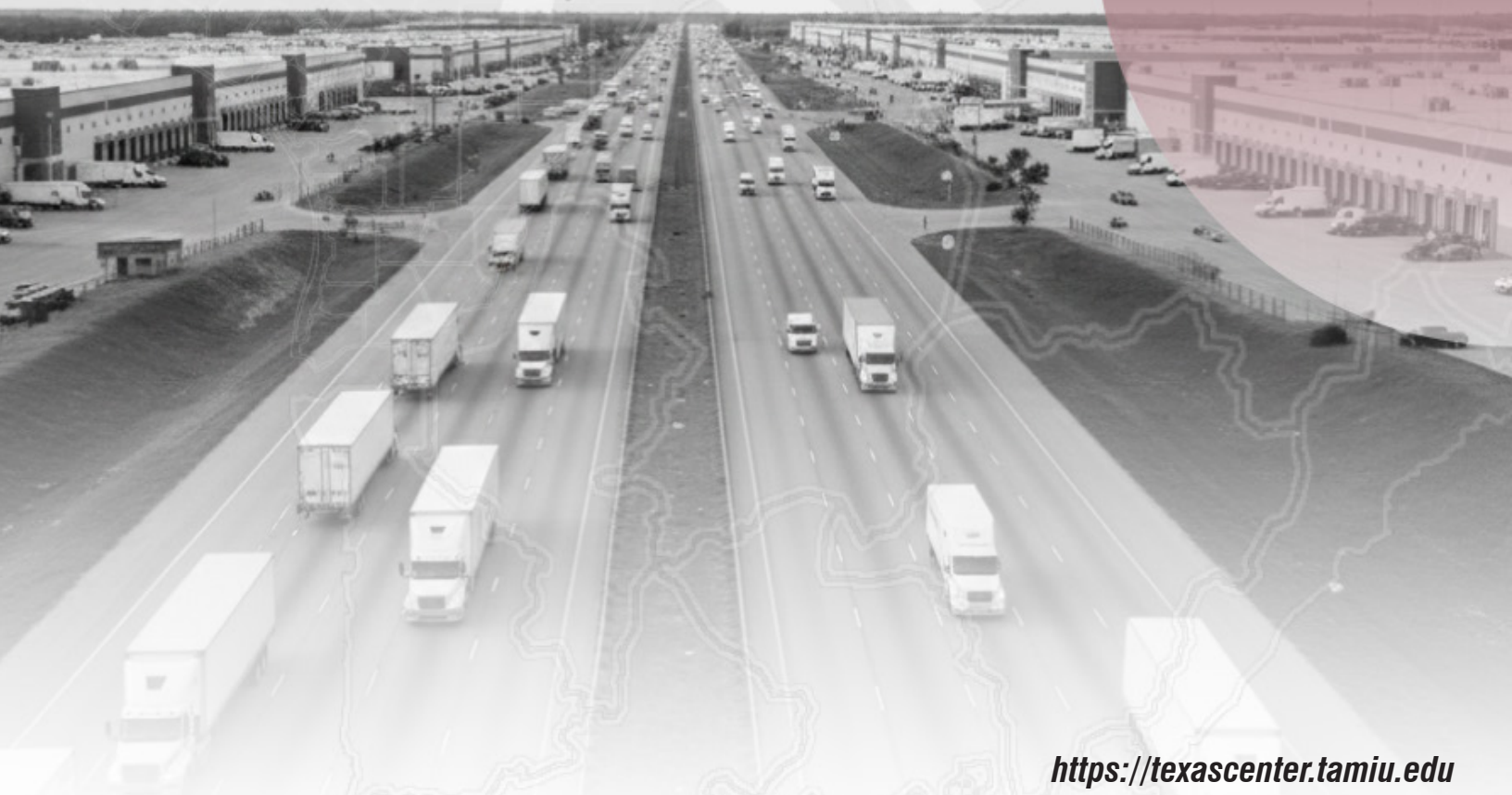
CROSSING PATHS:

Insights into U.S. International Trade



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