The Review of the USMCA and Fresh Produce: A Framework for Mutual Benefit Among the United States, Mexico, and Canada

The global fresh fruit and vegetable supply chain is one of the most deeply integrated in the world, and the North American market is particularly interdependent. Our countries rely on cross-border trade to meet year-round consumer demand and ensure food security. This complementary, seamless exchange supports growers in all three countries and has historically allowed for efficient and affordable access to a wide variety of fresh fruits and vegetables for the benefit of 388 million North American citizens.

In 2024 alone, Canada imported close to $5.5 billion in fresh produce from the United States, representing a little less than half of all fresh produce imports. Canada also imported another $3 billion in fresh produce from Mexico. Just as important, Canadian companies exported just over $4.5 billion in fresh produce to the United States, comprising more than 97% of all fresh produce exports[1]. That same year, the United States imported over 24 billion pounds of fresh produce from Mexico[2], valued at over $19.6 billion, and exported more than $1.7 billion into Mexico[3], which represented 80% of all produce imported by Mexico[4]. These figures highlight the critical interconnectedness of our agricultural economies.

The fresh produce industry is a major economic driver across North America. In Canada, the fresh produce supply chain generates $18.6 billion in GDP and supports more than 187,400 jobs in rural and urban communities from coast to coast to coast[5]. When considering the U.S./Mexico border region of Texas, New Mexico, Arizona, and California alone, there was a total economic impact of $40.80 billion from imported Mexico-grown produce. Not only does this mean that for every $1 imported the US benefits $2.75 in economic activity, it is also the economic engine for nearly 300,000 jobs in the United States.[6] Essentially, imports from Mexico generate billions in GDP and hundreds of thousands of jobs nationwide.

In order to meet year-round expectations from customers, many U.S. firms, from California to the East Coast, have sourcing arrangements in Mexico and/or Canada. Similarly, many Canadian distributors also have sourcing arrangements in Mexico and the U.S. Some of these operations are vertically integrated, and some are old-fashioned partnerships. Furthermore, integrated free trade in agricultural inputs – from fertilizers to substrates for indoor farms to equipment and technology – provide additional economic growth opportunities and support growers in all three countries.

Tariff-free and fair international trade in fresh produce not only offers huge economic growth opportunities for businesses but also provides consumers with access to safe, affordable and healthy fresh food options year-round that are crucial to addressing chronic health challenges.

U.S. per capita consumption of fresh vegetables increased 14% since trade barriers were eased in the mid-1990s. Diverse North American climates throughout the year and investments in Controlled

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[1] Statistics Canada, 2025

[2] USDA Agricultural Marketing Service, 2025

[3] U.S. Census Bureau, 2025

[4] International Trade Center, 2025

[5] Conference Board of Canada, 2025

[6] Ribera, Luis. "Economic Impact of U.S. Imports of Fresh Produce From Mexico by 2030 CNAS Issue Brief 2023-01." Texas A&M, Center for North American Studies, 2023.

Environment Agriculture (CEA) such as greenhouse production in Canada, Mexico, and the U.S. has further enabled year-round supply, reducing both production and consumer costs and improving access.

However, recent trade tensions have introduced volatility to this model. Tariffs directly translate into higher grocery prices and reduced availability and variety of fresh produce, making healthy eating more expensive and limiting consumer choice. Given the protective effect of fruits and vegetables on reducing the risk for many chronic diseases, it is clear that supporting access to these nutritious foods across the continent can contribute substantially to the health and well-being of our communities. The more stable the North American supply chain for fresh produce the larger the increased surety and thus fewer price elasticity scenarios when considering access to whole, unprocessed foods.

We fully understand and support each country's need to ensure food security for its citizens and the right to respond to unfair trade practices. Our organizations recognize the importance of a secure food supply and are strongly supportive of the existing rules to combat unfair behavior.

Consistent adherence to the current rules-based trade system protects businesses in all three countries and avoids the severe unintended consequences for growers, sellers, and consumers, and impacts to supply and pricing that can arise from trade volatility.

Recommendations to support a strong North American fresh produce sector in the USMCA review

- Do No Harm: supply chains once disrupted never return as they originally were. Our industry implores the three countries to approach the renegotiation endeavor with this principal front-and-center at all times.
- Of utmost importance, ensure continuity of the principle of rules-based, tariff free access for fresh produce across North America through a robust, trilateral trade agreement.

Renegotiating the USMCA is an opportunity to reaffirm North America's commitment to fair, efficient, and sustainable trade that ensures consumers access to the most affordable nutritious foods. This framework supports private-sector competitiveness, rural economies, and food security for all three nations.

Our organizations strongly urge our governments to maintain the current Agreement's provisions with respect to fresh fruits and vegetables to ensure continuity of the principle of rules-based, tariff free access for fresh produce across North America. We stand ready to serve as resources to your governments as you work to reach a robust trade agreement that will provide a stable North American economic and food system and long-term benefits for all.

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ASSOCIATION CANADIENNE DE LA DISTRIBUTION DE FRUITS ET LÉGUMES

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