

BACKGROUND

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NAFTA Renegotiations: What's at Stake for American Farmers, Ranchers, and Families

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Abstract

Agricultural trade provides many benefits to Americans—be they farmers, ranchers, or consumers. Exports enable farmers and ranchers to sell their goods to new markets, helping them to increase revenue and build stronger businesses. Imports make it possible for Americans and their families to purchase more affordable and better-quality agricultural commodities. Canada and Mexico are critical agricultural trading partners for the United States. This is why the current NAFTA renegotiations among the three countries is so important. This Background provides a picture of what is at stake with these negotiations by highlighting the importance of U.S. agricultural trade with both Canada and Mexico, on a national and state level. It also details some specific principles to guide this renegotiation process so that, at a minimum, the many benefits that the U.S. currently enjoys from agricultural trade are not threatened.

Agricultural trade provides many benefits to American farmers, ranchers, and consumers. Exports enable farmers and ranchers to sell their goods to new markets, helping them to increase revenue and build stronger businesses. Imports make it possible for Americans and their families to purchase more affordable and better-quality agricultural commodities, such as staple items like fruits and vegetables, more readily throughout the year.

Canada and Mexico are critical agricultural trading partners for the United States. This is why the current North American Free Trade Agreement (NAFTA) renegotiations among the three countries is so important. This *Background* provides a picture of what is at stake with these negotiations by highlighting the importance of U.S.

KEY POINTS

- Canada and Mexico are critical agricultural trading partners for the United States. This is why the current North American Free Trade Agreement (NAFTA) renegotiations among the three countries is so important.
- Agricultural trade provides many benefits to American farmers, ranchers, and consumers. Exports enable farmers and ranchers to sell their goods to new markets, helping them to increase revenue and build stronger businesses. Imports allow Americans to purchase more affordable and better-quality agricultural commodities.
- There is much at stake with the NAFTA renegotiations for American farmers, ranchers, and families. While risks do exist, the renegotiation process provides a unique opportunity to promote even freer agricultural trade and, as a result, greater prosperity.
- U.S. trade negotiators should ensure that, at a minimum, the many benefits that the U.S. currently enjoys from agricultural trade are not threatened.

This paper, in its entirety, can be found at <http://report.heritage.org/bg3277>

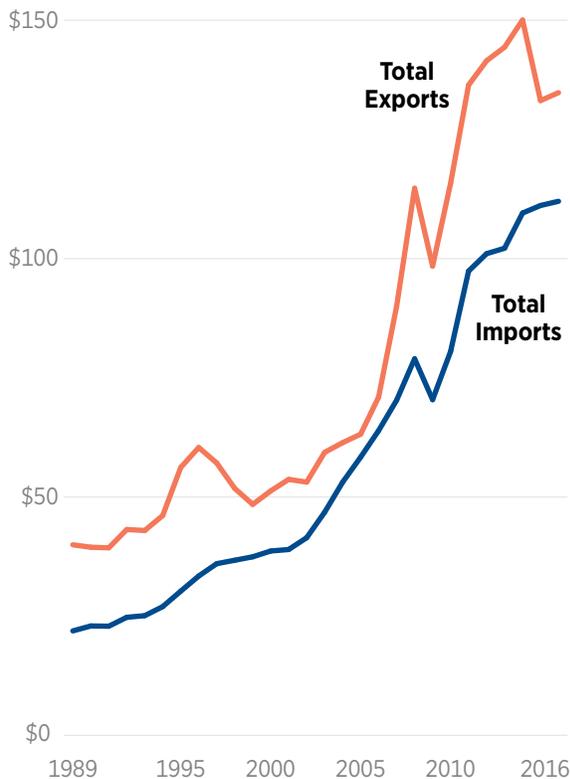
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CHART 1

Total U.S. Agricultural Imports and Exports

IN BILLIONS OF NOMINAL U.S. DOLLARS



SOURCE: U.S. Department of Agriculture, Foreign Agricultural Service, "Global Agricultural Trade System," <https://apps.fas.usda.gov/gats/default.aspx> (accessed December 15, 2017).

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agricultural trade with both Canada and Mexico, on a national and state level. Finally, it details some specific principles to guide this renegotiation process so that, at a minimum, the many benefits that the U.S. currently enjoys from agricultural trade are not threatened.

The Importance of Agricultural Trade in General

As Chart 1 shows, both U.S. agricultural exports and imports have increased dramatically. In 1989, agricultural exports were about \$40 billion, and by 2016 had increased to \$134.8 billion, more than a threefold increase. During that same time, agricul-

tural imports increased five times, from \$21.9 billion in 1989 to \$112 billion in 2016.¹

Exports. For many American farmers and ranchers, exports are a necessity. They produce more than they can sell domestically. The U.S. Department of Agriculture's (USDA's) Economic Research Service (ERS) explains, "With the productivity of U.S. agriculture growing faster than domestic food and fiber demand, U.S. farmers and agricultural firms rely heavily on export markets to sustain prices and revenues."²

Based on volume, agricultural exports averaged about 20 percent of agricultural production from 2011 to 2013.³ For certain commodities, exports are even more important. For example, exports accounted for over 70 percent of the volume for both cotton and tree nuts (mostly almonds), and over 50 percent for wheat and rice.⁴ Further, according to the Congressional Research Service (CRS), "U.S. agricultural exports are projected to account for 33.4% of gross cash earnings in 2017."⁵

From an economy-wide perspective, according to the ERS, in 2015, agricultural exports created an additional \$169.4 billion in economic activity and over 1 million full-time jobs.⁶

Imports. Agricultural imports provide significant benefits to American consumers. For certain commodities, imports are critical because consumer demand exceeds domestic production capabilities.⁷ As an example, the ERS explains that "[o]ver 95 percent of coffee/cocoa/spices and fish/shellfish products consumed in the United States are imported."⁸

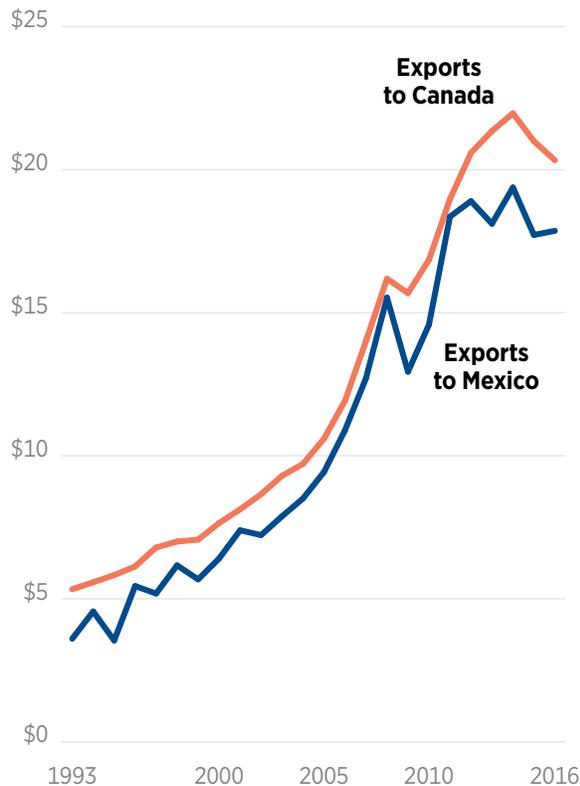
The Office of the United States Trade Representative has explained: "It's important to remember that United States agricultural imports benefit consumers with lower prices and expanded choices."⁹ The ERS notes that "U.S. consumers benefit from imports because imports expand food variety, stabilize year-round supplies of fresh fruits and vegetables, and temper increases in food prices."¹⁰ In a recent report, the CRS highlights perceived market benefits of fruit and vegetable imports, such as "lowering costs (given a wider supply network)" and "improving eating quality."¹¹

Further, high food prices have a disproportionate impact on low-income households. The lowest-income households spend a greater share of their after-tax income on food (33.0 percent) than other households, including the highest-income households (8.7 percent).¹² By making food more affordable, including for staple items like fruits and vegetables, agricultural imports particularly help low-income households.

CHART 2

U.S. Agricultural Exports to Canada and Mexico

IN BILLIONS OF NOMINAL U.S. DOLLARS



SOURCE: U.S. Department of Agriculture Foreign, Agricultural Service, "Global Agricultural Trade System," <https://apps.fas.usda.gov/gats/default.aspx> (accessed December 15, 2017).

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The Importance of Agricultural Exports to Canada and Mexico

Canada and Mexico are critical agricultural partners for the United States. As shown in Chart 2, agricultural exports to Canada were \$5.3 billion in 1993, the year before implementation of NAFTA. In 2016, this number had nearly quadrupled to \$20.3 billion. Agricultural exports to Mexico also saw major growth: In 1993, agricultural exports to Mexico were \$3.6 billion and increased almost five times to \$17.9 billion in 2016.¹³

In 2016, Canada and Mexico were the second-largest and third-largest U.S. agricultural export mar-

TABLE 1

Ranking Commodity Markets to Canada and Mexico, 2016

Commodity	Rank of Market to Canada	Rank of Market to Mexico
Poultry & Poultry Products	2	1
Dairy Products	2	1
Fresh Fruit	1	2
Fresh Vegetables	1	3
Rice	4	1
Peanuts	3	2
Pork & Pork Products	3	2
Beef & Beef Products	4	3
Corn	11	1
Soybeans	18	2
Wheat	38	1
Cotton	35	5

SOURCE: U.S. Department of Agriculture, Foreign Agricultural Service, "Global Agricultural Trade System," <https://apps.fas.usda.gov/gats/default.aspx> (accessed December 15, 2017).

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kets, respectively. While China was the largest market with \$21.4 billion, Canada was very close at \$20.3 billion; in 2015, Canada was ahead of China. To provide additional context: Total agricultural exports to Canada and Mexico were greater than the next nine largest agricultural export markets *combined*.¹⁴

Export Data by Commodities. Table 1 lists 12 major commodities and their agricultural exports to Canada and Mexico in 2016. For seven of the 12 commodities listed, Canada or Mexico was the largest agricultural export market, and for 11 of the commodities, Canada or Mexico was a top three market. Further, for half of the commodities listed, *both* Canada and Mexico were a top three market.¹⁵

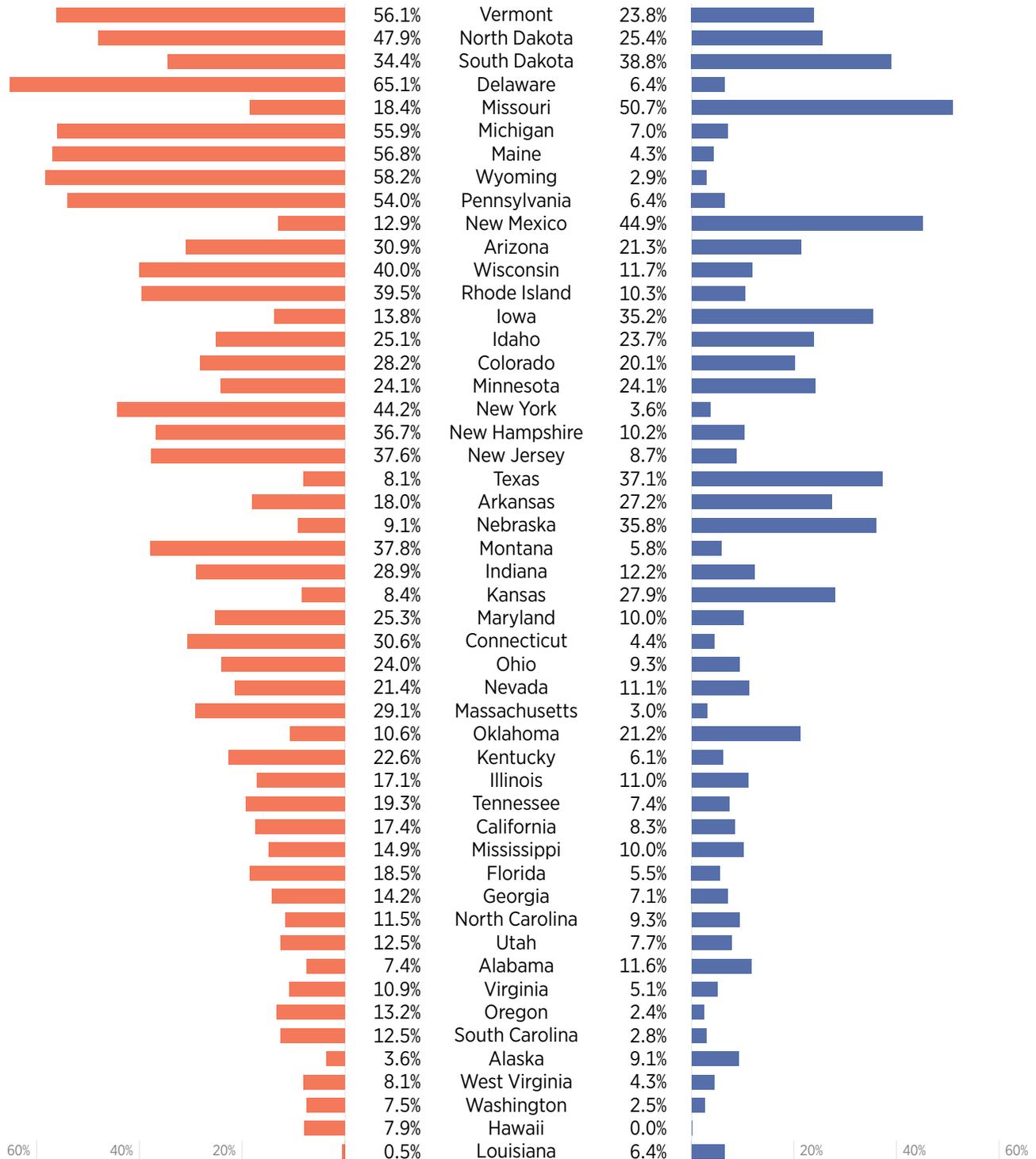
The data are also illuminating when looking at the value of agricultural exports to Canada and Mexico. At least 20 percent of the agricultural exports of nine of the 12 commodities went to Canada and Mexico (see Appendix Table 1). For half of the commodities listed, more than a third went to Canada and Mexico

CHART 3

Agricultural Exports to Canada and Mexico, by State, 2016

PERCENTAGE OF STATE'S AG EXPORTS TO CANADA

PERCENTAGE OF STATE'S AG EXPORTS TO MEXICO

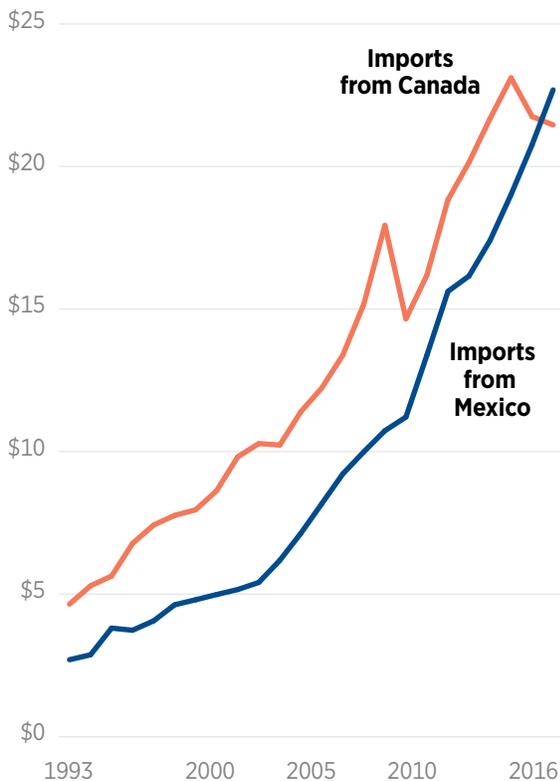


SOURCE: U.S. Department of Agriculture, Foreign Agricultural Service, "Global Agricultural Trade System," <https://apps.fas.usda.gov/gats/default.aspx> (accessed December 15, 2017).

CHART 4

U.S. Agricultural Imports from Canada and Mexico

IN BILLIONS OF NOMINAL U.S. DOLLARS



SOURCE: U.S. Department of Agriculture, Foreign Agricultural Service, "Global Agricultural Trade System," <https://apps.fas.usda.gov/gats/default.aspx> (accessed December 15, 2017).

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(this included dairy products, fresh fruit and fresh vegetables, poultry meats and products, pork and pork products, and peanuts). Fresh fruit and vegetable exports to Canada and Mexico were especially important, accounting for 47 percent and 82 percent of their total exports, respectively.¹⁶ Appendix Table 1 provides a more detailed breakdown of agricultural export data by commodity.

Export Data by States. The benefit of agricultural exports to Canada and Mexico is spread across most states. Map 1 shows that either Canada or Mexico, in 2016, was the top agricultural export market for an incredible 37 states and a top three market for every state except Hawaii and Washington. There

were 31 states in which Canada and Mexico were *both* a top three market, including states as different as Iowa and Rhode Island.¹⁷

When looking at percentage of agricultural exports for each state (in terms of value), as shown in Chart 3, there were 41 states in which 20 percent or more of agricultural exports went to Canada and Mexico, 32 states with 30 percent or more, and 12 states with more than half of agricultural exports going to Canada and Mexico.¹⁸ Appendix Table 2 provides a more detailed breakdown of agricultural export data by states.

The Importance of Agricultural Imports from Canada and Mexico

As shown in Chart 4, agricultural imports from Canada were \$4.7 billion in 1993, the year before implementation of NAFTA. In 2016, this number had more than quadrupled to \$21.5 billion. Agricultural imports from Mexico also saw major growth: In 1993, agricultural imports from Mexico were \$2.7 billion and increased more than eight times to \$22.7 billion in 2016.¹⁹

In 2016, Mexico and Canada were the largest and second-largest agricultural importing countries for the U.S., respectively. There was a big difference compared to other countries: The third-largest importer was China, and its imports (\$4.2 billion) were just one-fifth of Canada's imports (\$21.5 billion). The total imports from Mexico and Canada was greater than the next 16 countries *combined*.²⁰

Both countries provide American consumers with a wide variety of imports, including fruits and vegetables. Table 2, using CRS data,²¹ shows the ranking of countries by fruit and vegetable imports to the U.S. Mexico is by far the top importer, with Canada a distant second. In 2015, both countries accounted for an astonishing 56 percent of the fruit and vegetable imports to the U.S.²²

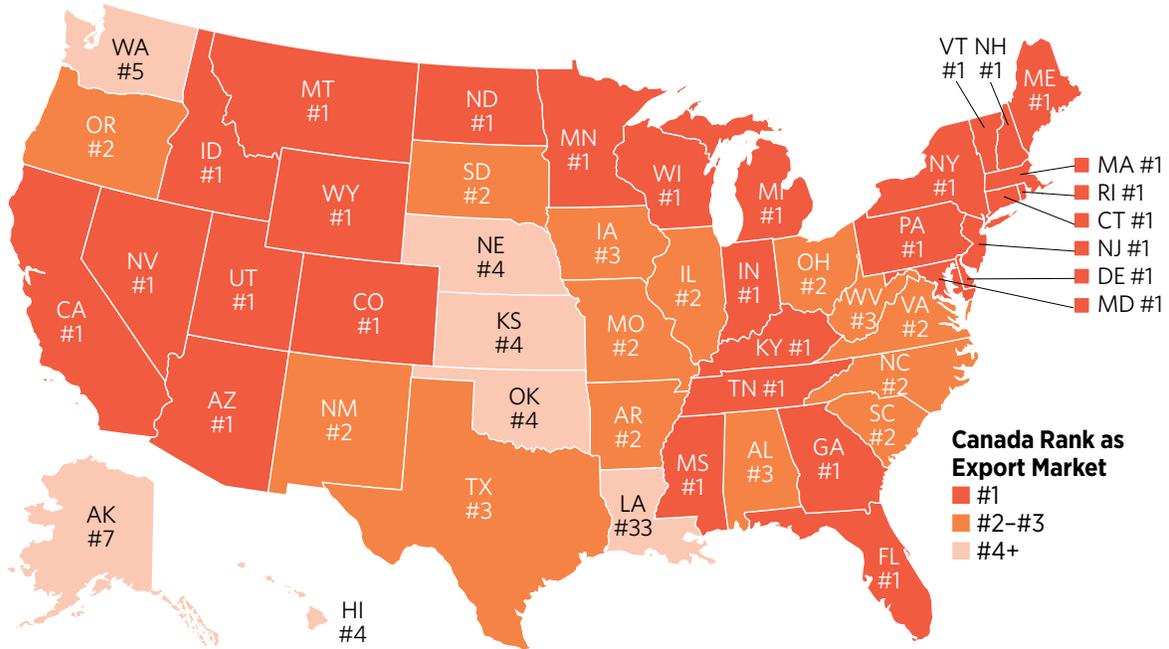
Principles to Inform NAFTA Renegotiations and Agriculture

These data show how important agricultural trade with Canada and Mexico is for the U.S. The current NAFTA renegotiations should not risk these benefits. NAFTA helped to free up trade between Canada, Mexico, and the U.S., and if anything, renegotiations should only improve upon the agreement, not create unnecessary barriers. U.S. trade negotiators should keep the following principles in mind during the renegotiation process:

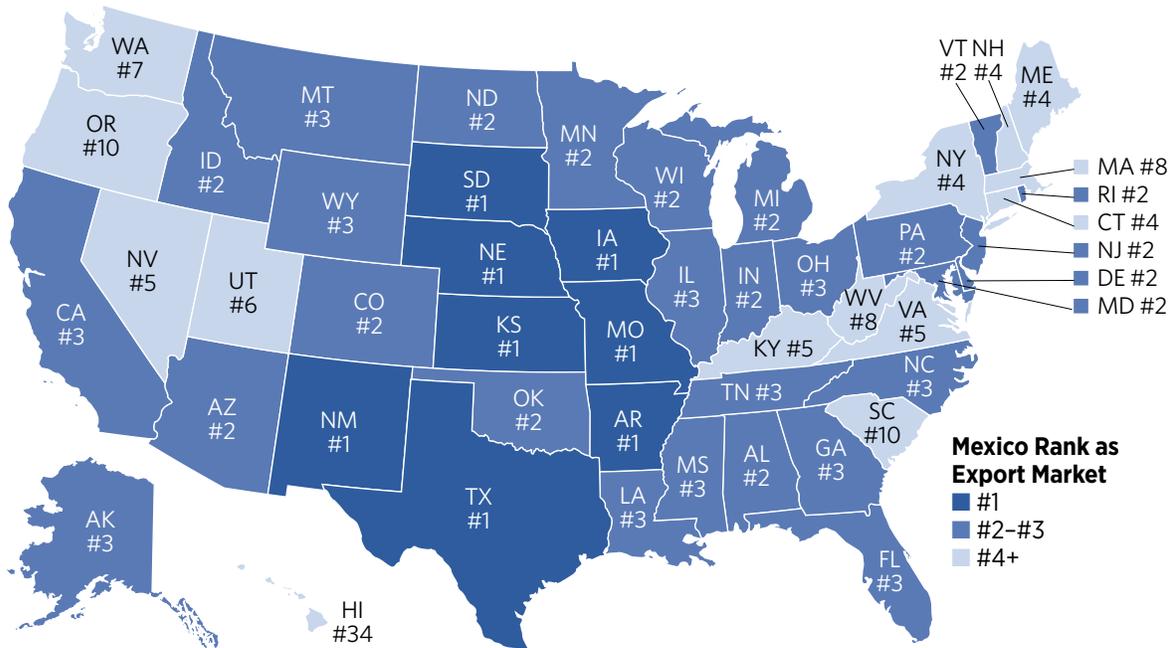
MAP 1

The Importance of Canada and Mexico to State Agricultural Exports

HOW CANADA RANKS AS AN AGRICULTURAL EXPORT MARKET, BY STATE, 2016



HOW MEXICO RANKS AS AN AGRICULTURAL EXPORT MARKET, BY STATE, 2016



SOURCE: U.S. Department of Agriculture, Foreign Agricultural Service, "Global Agricultural Trade System," <https://apps.fas.usda.gov/gats/default.aspx> (accessed December 15, 2017).

TABLE 2

Suppliers of U.S. Fruit and Vegetable Imports, 2015

Country	Total (Millions of U.S. Dollars)	Share
Mexico	\$10,413	44%
Canada	\$2,919	12%
Chile	\$1,950	8%
EU-28	\$1,630	7%
China	\$1,404	6%
Peru	\$1,114	5%
Costa Rica	\$737	3%
Guatemala	\$467	2%
Thailand	\$406	2%
Brazil	\$366	2%
Argentina	\$301	1%
Turkey	\$228	1%
Philippines	\$214	1%
Ecuador	\$189	1%
All other	\$1,176	5%
Total	\$23,514	100%

SOURCE: Congressional Research Service, "The U.S. Trade Situation for Fruit and Vegetable Products," <https://fas.org/sgp/crs/misc/RL34468.pdf> (accessed December 1, 2017).

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- **First, do no harm.** There has been a constant²³ mantra from many in the agricultural community regarding the renegotiations, including USDA Secretary Sonny Perdue:²⁴ “[D]o no harm.” It is understandable why this has been the message; farmers and ranchers recognize the current benefits of agricultural trade. While this message may be simple, it does capture the bottom line principle that should guide the renegotiations.
- **Do not pick winners and losers.** Trade negotiators should not help one industry at the expense of another, including agriculture, regardless of whether agriculture is the beneficiary or the “victim.” This principle should also apply when it comes to picking winners and losers within the overall agricultural sector or within a specific

agricultural industry. Unfortunately, U.S. trade negotiators have been pushing a provision in the NAFTA renegotiations (known as the seasonal provision) that would favor a subset of a specific agricultural industry (by making it possible for growers to bring trade complaints on behalf of their “sub-industry”), even at the expense of other producers within that industry and others in agriculture.²⁵

For example, Florida tomato growers could bring a case that would be analyzed based on their experience alone, regardless of whether producers of tomatoes in other states have the same concerns or are suffering any harm.

This appears to be a matter not of whether a foreign country or its producers are taking inappropriate actions but of whether a small set of growers within an industry are able to effectively compete in the marketplace. The provision could lead to more trade disputes and possible trade retaliation against a wide range of agricultural commodities.

- **Minimize delay and uncertainty.** Mexico is already reportedly looking to other countries to meet some of its agricultural import needs.²⁶ With NAFTA in flux, both Canada and Mexico will likely look to producers in other countries, at least to some extent. American farmers and ranchers compete in a global agricultural marketplace, and factors that create uncertainty only make securing foreign customers more difficult. Further, once customers are lost, they may be difficult to win back in the future if foreign producers have successfully filled demand.
- **Promote freedom to trade.** Trade is often discussed in connection with how it affects countries, but, as a general matter, trade is truly about the freedom²⁷ of individuals and businesses to voluntarily exchange goods and services with customers. American farmers and ranchers, just like other businesses, should be free to sell to customers all over the world. Further, consumers should be free to purchase goods and services that best meet their needs, regardless of national origin. Government-imposed barriers, such as tariffs, undermine these freedoms. As U.S. trade

negotiators work through the NAFTA renegotiations, this principle of freedom to trade should be front and center.

Conclusion

There is much at stake for agricultural producers and American families as a result of the NAFTA renegotiations. While risks do exist, the renegotiation process provides a unique opportunity to promote even freer agricultural trade, and as a result, greater prosperity. By addressing agricultural issues using the outlined principles, agricultural trade between Canada, Mexico, and the United States will continue to flourish.

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APPENDIX TABLE 1

Agricultural Commodity Export Data

IN THOUSANDS OF U.S. DOLLARS, 2016

Commodity	WORLD	TO CANADA			TO MEXICO			COMBINED	
	Total	Total	Percentage	Rank	Total	Percentage	Rank	Total	Percentage
Wheat	5,350,709	17,924	0.3%	38	611,439	11.4%	1	629,363	11.8%
Corn	9,993,674	146,476	1.5%	11	2,573,467	25.8%	1	2,719,943	27.2%
Rice	1,796,767	148,446	8.3%	4	273,781	15.2%	1	422,227	23.5%
Soybeans	22,819,992	106,116	0.5%	18	1,461,020	6.4%	2	1,567,136	6.9%
Cotton	3,966,667	579	0.0%	35	339,551	8.6%	5	340,130	8.6%
Peanuts	579,486	105,825	18.3%	3	107,540	18.6%	2	213,365	36.8%
Beef & Beef Products	6,211,518	758,126	12.2%	4	868,507	14.0%	3	1,626,633	26.2%
Pork & Pork Products	5,720,454	792,886	13.9%	3	1,328,902	23.2%	2	2,121,788	37.1%
Poultry & Poultry Products	3,713,204	499,878	13.5%	2	870,813	23.5%	1	1,370,691	36.9%
Dairy Products	4,454,466	506,126	11.4%	2	1,197,335	26.9%	1	1,703,461	38.2%
Fresh Fruit	4,564,497	1,634,040	35.8%	1	501,120	10.9%	2	2,135,160	46.8%
Fresh Vegetables	2,261,977	1,742,916	77.1%	1	101,085	4.5%	3	1,844,001	81.5%

SOURCE: U.S. Department of Agriculture, Foreign Agricultural Service, "Global Agricultural Trade System," <https://apps.fas.usda.gov/gats/default.aspx> (accessed December 15, 2017).

APPENDIX TABLE 2

State Agricultural Export Data (Page 1 of 2)

IN THOUSANDS OF U.S. DOLLARS, 2016

U.S. States	WORLD	TO CANADA			TO MEXICO			COMBINED	
	Total	Total	Percentage	Rank	Total	Percentage	Rank	Total	Percentage
Alabama	683,344	50,709	7.4%	3	79,070	11.6	2	129,779	19.0%
Alaska	19,363	704	3.6%	7	1,770	9.1	3	2,474	12.8%
Arizona	1,302,859	402,000	30.9%	1	277,819	21.3	2	679,819	52.2%
Arkansas	1,000,577	179,763	18.0%	2	271,938	27.2	1	451,701	45.1%
California	23,507,250	4,090,750	17.4%	1	1,962,527	8.3	3	6,053,277	25.8%
Colorado	1,660,874	467,654	28.2%	1	333,564	20.1	2	801,218	48.2%
Connecticut	238,432	73,018	30.6%	1	10,456	4.4	4	83,474	35.0%
Delaware	314,449	204,697	65.1%	1	20,087	6.4	2	224,784	71.5%
Florida	3,511,271	650,227	18.5%	1	194,197	5.5	3	844,424	24.0%
Georgia	3,399,767	481,764	14.2%	1	239,869	7.1	3	721,633	21.2%
Hawaii	78,035	6,159	7.9%	4	26	0.0	34	6,185	7.9%
Idaho	744,124	186,885	25.1%	1	176,578	23.7	2	363,463	48.8%
Illinois	7,957,324	1,361,708	17.1%	2	872,789	11.0	3	2,234,497	28.1%
Indiana	1,365,257	394,642	28.9%	1	166,483	12.2	2	561,125	41.1%
Iowa	4,827,023	665,910	13.8%	3	1,699,442	35.2	1	2,365,352	49.0%
Kansas	3,669,431	308,198	8.4%	4	1,021,976	27.9	1	1,330,174	36.3%
Kentucky	652,082	147,650	22.6%	1	39,736	6.1	5	187,386	28.7%
Louisiana	20,443,416	111,241	0.5%	33	1,314,090	6.4	3	1,425,331	7.0%
Maine	183,787	104,413	56.8%	1	7,820	4.3	4	112,233	61.1%
Maryland	358,302	90,542	25.3%	1	35,830	10.0	2	126,372	35.3%
Massachusetts	547,998	159,491	29.1%	1	16,523	3.0	8	176,014	32.1%
Michigan	1,787,824	999,838	55.9%	1	124,358	7.0	2	1,124,196	62.9%
Minnesota	2,466,980	594,386	24.1%	1	593,542	24.1	2	1,187,928	48.2%
Mississippi	577,850	85,823	14.9%	1	57,924	10.0	3	143,747	24.9%
Missouri	2,083,840	383,781	18.4%	2	1,056,905	50.7	1	1,440,686	69.1%
Montana	257,422	97,241	37.8%	1	14,875	5.8	3	112,116	43.6%
Nebraska	3,377,535	307,057	9.1%	4	1,208,743	35.8	1	1,515,800	44.9%
Nevada	243,513	52,082	21.4%	1	27,084	11.1	5	79,166	32.5%
New Hampshire	67,877	24,911	36.7%	1	6,922	10.2	4	31,833	46.9%
New Jersey	2,801,700	1,053,223	37.6%	1	244,307	8.7	2	1,297,530	46.3%
New Mexico	208,281	26,961	12.9%	2	93,570	44.9	1	120,531	57.9%
New York	2,133,804	943,687	44.2%	1	77,569	3.6	4	1,021,256	47.9%
North Carolina	2,545,849	294,020	11.5%	2	235,625	9.3	3	529,645	20.8%
North Dakota	810,189	388,392	47.9%	1	205,688	25.4	2	594,080	73.3%
Ohio	3,686,713	884,556	24.0%	2	344,641	9.3	3	1,229,197	33.3%
Oklahoma	538,078	57,037	10.6%	4	113,851	21.2	2	170,888	31.8%
Oregon	2,518,061	332,966	13.2%	2	60,529	2.4	10	393,495	15.6%
Pennsylvania	2,369,126	1,278,248	54.0%	1	152,739	6.4	2	1,430,987	60.4%

APPENDIX TABLE 1

State Agricultural Export Data (Page 2 of 2)

U.S. States	WORLD	TO CANADA			TO MEXICO			COMBINED	
	Total	Total	Percentage	Rank	Total	Percentage	Rank	Total	Percentage
Rhode Island	14,673	5,790	39.5%	1	1,511	10.3	2	7,301	49.8%
South Carolina	1,019,550	127,873	12.5%	2	28,724	2.8	10	156,597	15.4%
South Dakota	567,973	195,415	34.4%	2	220,469	38.8	1	415,884	73.2%
Tennessee	1,278,579	246,869	19.3%	1	94,167	7.4	3	341,036	26.7%
Texas	9,860,299	798,400	8.1%	3	3,653,597	37.1	1	4,451,997	45.2%
Utah	1,096,678	137,035	12.5%	1	84,567	7.7	6	221,602	20.2%
Vermont	217,197	121,757	56.1%	1	51,670	23.8	2	173,427	79.8%
Virginia	2,247,043	244,160	10.9%	2	113,787	5.1	5	357,947	15.9%
Washington	13,556,858	1,017,339	7.5%	5	340,868	2.5	7	1,358,207	10.0%
West Virginia	31,434	2,536	8.1%	3	1,361	4.3	8	3,897	12.4%
Wisconsin	2,816,267	1,125,308	40.0%	1	330,123	11.7	2	1,455,431	51.7%
Wyoming	7,782	4,529	58.2%	1	223	2.9	3	4,752	61.1%

SOURCE: U.S. Department of Agriculture, Foreign Agricultural Service, "Global Agricultural Trade System," <https://apps.fas.usda.gov/gats/default.aspx> (accessed December 15, 2017).

Endnotes

1. U.S. Department of Agriculture Foreign Agricultural Service, "Global Agricultural Trade System," [GATS], <https://apps.fas.usda.gov/gats/default.aspx> (accessed January 3, 2018). The following criteria were used: Data Source: FAS U.S. Trade; Product Type: Exports (for exports) and Imports–Consumption (for imports); Product Group: BICO (HS-6); Partners: World Total; Products: Agricultural Products. Note: This *Backgrounder*, for consistency purposes, uses the GATS system except where noted.
2. U.S. Department of Agriculture, Economic Research Service, "U.S. Agricultural Trade Overview," <https://www.ers.usda.gov/topics/international-markets-trade/us-agricultural-trade/> (accessed January 8, 2018).
3. U.S. Department of Agriculture, Economic Research Service, "Exports Expand the Market for U.S. Agricultural Products," chart, <https://www.ers.usda.gov/data-products/chart-gallery/gallery/chart-detail/?chartId=58396> (accessed January 8, 2018).
4. Ibid.
5. Randy Schnepf, "U.S. Farm Income Outlook for 2017," Congressional Research Service, October 4, 2017, <https://fas.org/sgp/crs/misc/R40152.pdf> (accessed January 8, 2018).
6. U.S. Department of Agriculture, Economic Research Service, "Agricultural Trade Multipliers, Effects of Trade on the U.S. Economy–2015," <https://www.ers.usda.gov/data-products/agricultural-trade-multipliers/effects-of-trade-on-the-us-economy-2015/> (accessed January 8, 2018).
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8. Ibid.
9. U.S. Trade Representative, "NAFTA Good for Farmers, Good for America," <https://ustr.gov/about-us/policy-offices/press-office/fact-sheets/archives/2001/june/nafta-good-farmers-good-america> (accessed January 8, 2017).
10. U.S. Department of Agriculture, Economic Research Service, "U.S. Agricultural Trade Overview."
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