

Uneven State-Level Exposure to Potential US Tariff Disputes with Canada and Mexico

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Agri-food trade plays a central role in the US food supply chain, supporting farm incomes as well as consumer food security (National Association of State Departments of Agriculture, 2025). In 2024, agricultural and food exports accounted for 15.29% of total US export value (\$2.29 trillion), and imports represented 8.83% of inbound trade (\$138 billion) (Freight Analysis Framework v5, 2025). These figures highlight the deep integration of US agriculture with global markets and its direct contribution to the stability of the food supply chain.

In 2025, however, this system came under severe economic pressure as tariff changes triggered not only retaliatory measures but also consumer boycotts of American products from major trading partners. Farmers specializing in export-oriented crops such as grain could be at risk of losing income from diminished foreign demand alongside rising costs for imported farm inputs, while consumers reliant on foreign-sourced food products may encounter heightened inflationary pressures (Goyal et al., 2024).

Crucially, these pressures are likely to be felt unevenly across the country. States with concentrated export-oriented production—such as Iowa and Illinois in soybeans—would be particularly vulnerable to any backlash from trading partners. In contrast, regions with less trade-dependent agricultural sectors, such as parts of the Northeast, are comparatively insulated. On the import side, sectors directly engaged in trade subject to tariffs face immediate shocks, and these cost shocks could ripple through the multiple stages of the food supply chain.

To capture this uneven geography of risks, this article provides a descriptive analysis of state-level agri-food trade using the Freight Analysis Framework v5 (FAF5) dataset. Unlike national trade statistics, FAF5 disaggregates trade flows by both origin and destination states as well as by commodity groups. This level of detail provides a clearer view of how tariff shocks could

create uneven risks across the country, identifying, for example, which states are most likely to lose export markets and which would face higher import price shocks. Our analysis relies on 2024 trade flows to estimate the prospective consequences of tariff changes in 2025, given the relative stability of the established trade patterns. By analyzing state-level trade structures, we illustrate how tariff shocks could generate different outcomes across US regions, sectors, and supply chains.

Background on the 2025 Tariff Landscape

In early 2025, the United States implemented one of the most sweeping changes in its tariff regime in recent history. Invoking the International Emergency Economic Powers Act (IEEPA), the federal government imposed a 10% across-the-board tariff on all imports, with additional country-specific duties tentatively ranging from 11% to 50%. These measures immediately raised import prices, disrupted supply chains, and provoked retaliation plans from major trading partners (Burkhart and Hammond, 2025).

In particular, Canada initially responded by applying 25% tariffs on about US\$30 billion of US exports, targeting high-value agri-food products such as dairy, poultry, fruits, and alcoholic beverages. At one point, China imposed retaliatory tariffs as high as 125% on beef, pork, dairy, fruits, and tree nuts, while Mexico considered similar measures before ultimately refraining (Rosch and Tsui, 2025). Consumer boycotts of US products in Canada, China, Germany, and Mexico further amplified risks faced by US producers (Frisbie, 2025).

The potential impact could be most severe within North America, where agricultural markets are highly integrated under the United States–Mexico–Canada Agreement (USMCA, 2020). Tariffs on nearly all bilateral agri-food flows with Canada and Mexico could reduce US export demand while raising the cost of imported farm

inputs such as fertilizer, feed, and machinery. For states dependent on Canadian and Mexican imports, these dynamics could translate into higher consumer food prices and inflationary pressures. Projections from the International Food Policy Research Institute (2025) indicate that US agrifood imports could fall by 46.4% from Mexico and 60.5% from Canada, producing a 10.2% overall contraction in national imports.

This type of dual shock has the potential to intensify US farmers' vulnerability by limiting access to foreign markets, raise the price of imported inputs such as fertilizers, and raise domestic food prices, while global demand shifts toward competitors such as Brazil and Argentina in beef, soybeans, and fruit exports (Frisbie, 2025). Its consequences are likely to be highly localized, reflecting regional disparities in production structures, consumer demand, and market integration.

Data

Freight Analysis Framework 5 (FAF5)

Our analysis mainly draws on the FAF5 dataset, which records annual freight movements between US states, encompassing shipments ultimately consumed both domestically and internationally. Developed by the Bureau of Transportation Statistics (BTS) with support from the Federal Highway Administration (FHWA), the dataset integrates multiple data sources, including the Commodity Flow Survey and international trade statistics from the Census Bureau (Bureau of Transportation Statistics, 2025).

In this study, we rely on the FAF5 survey for the 2024 calendar year to examine state-level trade patterns. FAF5 reports shipment movements by origin–destination pairs and commodity types. For domestic shipments, both origins and destinations are recorded as the corresponding US states. For international trade, exported and imported shipments are reported at the FAF5 regional level (e.g., Canada, Mexico, the rest of the Americas, and Europe) along with information on the intermediate US states from which exports physically depart or in which imports are ultimately consumed. Namely, the intermediate states are the beginning of a freight movement or the ending of a freight movement regardless of geography. This structure enables the dataset to trace flows back to production sources and forward to final demand, not just to border transactions.

The raw FAF5 dataset contains both interstate and international flow observations, broken down by origin, destination, intermediate state for international shipments, commodity type, domestic transport mode, and reported value and tonnage. To focus on state-level vulnerabilities to potential tariff changes, we aggregate the dataset to represent total trade values by origin, (final) destination, and commodity type, focusing on internationally traded shipments in 2024. Similar to the HS code system, the FAF5 dataset categorizes the

agrifood sector into eight commodity groups: live animals and fish, cereal grains, non-cereal crops (such as soybeans, fruits and vegetables, and nuts), feed and animal origin, meat and seafood, milled grain, processed food and beverages, and alcoholic beverages.

Incorporating State-Level Top Five Traded Commodities into the FAF5 Dataset

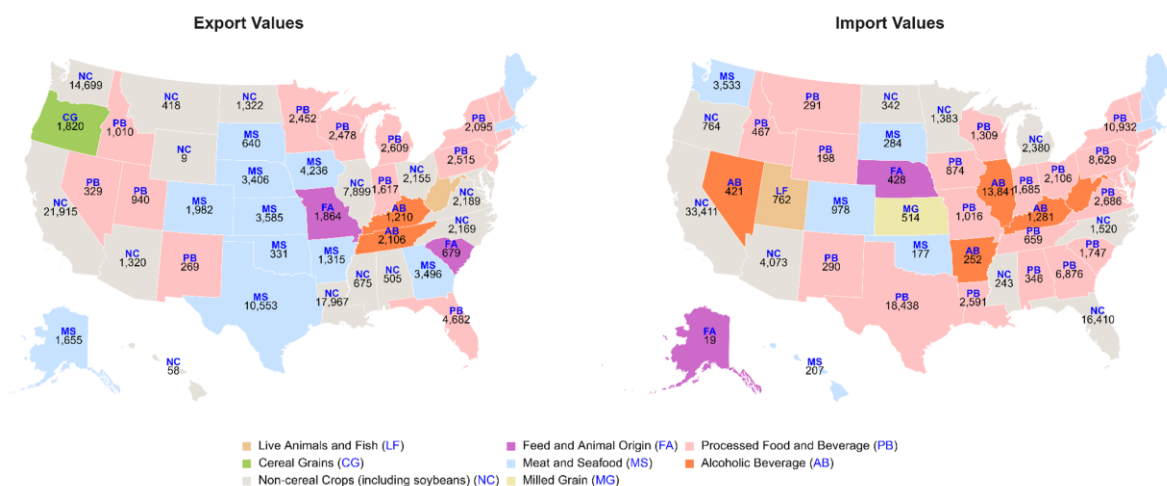
A key challenge of the FAF5 framework is that it broadly categorizes multiple commodities into non-cereal crops. This category includes a wide range of products, from oilseeds such as soybeans to specialty crops such as fruits, vegetables, and nuts. By grouping such diverse products into a single category, the FAF5 system makes it difficult to attribute observed trade flows to a key driver and to identify which commodities are responsible for shaping observed patterns.

To overcome this limitation, our analysis incorporates supplemental evidence on the top five agricultural commodities exported and imported from each state in 2024, as reported by the USDA Economic Research Service (USDA-ERS, 2025). Integrating these two sources provides an effective cross-referencing mechanism. If FAF5 indicates strong non-cereal crops activity in a particular state, the ERS data can help determine which commodities—among soybeans, fruits, vegetables, other oilseeds, etc.—are the primary contributors. This clarifies the composition of state trade flows in detail, offering deeper insights into regional production strengths and comparative advantages.

Geographic Patterns of Agrifood Trade

Figure 1 presents the distribution of US state-level agrifood international exports and imports in 2024. The left panel details export values by origin state and leading commodity, while the right panel presents import values by destination state, with state labels indicating total values and colors denoting dominant import commodities. Exports align closely with regional production strengths. Non-cereal crops are a leading export category across several regions. According to USDA-ERS data on the top five agricultural commodity exports by state, soybeans dominate in the Midwest and Northern Plains (Illinois, Ohio, North Dakota, Montana, Wyoming), and in key port states (Washington, Louisiana, Virginia, Alabama). Reported exports from these port states include local harvests as well as interstate inflows held in local storage facilities for extended periods before final shipment abroad. Fruits, vegetables, and nuts are the leading exports in the Pacific and Southwest (California, Arizona, Washington), reflecting strong horticultural production. In the South (Mississippi, North Carolina), exports feature a diverse mix of other non-cereal crops (e.g., oilseeds, plant products, cut flowers). Meat and seafood lead exports from livestock-producing regions, including Texas, Iowa, Colorado, Kansas, and Georgia. Feed and animal origin products are prominent in Missouri and South Carolina,

Figure 1. Export and Import Values of Top Commodities by Origin and Destination State (US\$ millions)



Notes: The left panel shows the export value of top commodities by origin state (in US\$ millions), and the right panel shows the import value of top commodities by destination state (in US\$ millions). Commodities are grouped following the FAF5 dataset classification (similar to the HS code system).

while alcoholic beverages are important in Kentucky and Tennessee, reflecting their long-established bourbon and whiskey industries.

On the import side, processed food and beverages lead in most states, underscoring their role in contemporary US household food consumption. Coastal and border states such as California, Florida, Arizona, Michigan, North Dakota, Oregon, and Minnesota import significant volumes of vegetables, underscoring the reliance on specialized imports to meet consumer needs—an observation clearly highlighted by USDA-ERS (2025) data on the top five agricultural commodities imported by state in 2024. Meat and seafood are primary imports in some interior states such as Colorado and Oklahoma, while alcoholic beverages rank highest in Illinois and Kentucky.

Overall, Figure 1 underscores a clear distinction in the channels of potential tariff exposure across states. Some states are positioned primarily as farm-gate exporters, while others are consumers of imported food products. Major net-exporting states include Louisiana (\$7.71 billion in net exports), Washington (\$4.54 billion), Iowa (\$1.72 billion), California (\$1.68 billion), and Alaska (\$1.55 billion). In these states, producers and associated market actors may face heightened vulnerability to trade policy shifts, including foreign retaliation and reduced market access.

Conversely, tariff exposure is not confined to consumers in net-importing states. In 2024, most of the top ten populous states fell into this category, including Illinois (\$4.34 billion in net imports), Texas (\$3.93 billion), Florida (\$3.78 billion), Georgia (\$3.62 billion), Arizona (\$2.36 billion), and New York (\$2.17 billion) (US Census

Bureau, 2024). Their reliance on inbound shipments reflects underlying demographic drivers of import demand. Importantly, the effects of tariffs would not be restricted only to these direct import hubs. By raising input costs for local food manufacturers, tariffs can ripple through supply chains and ultimately contribute to higher consumer prices nationwide.

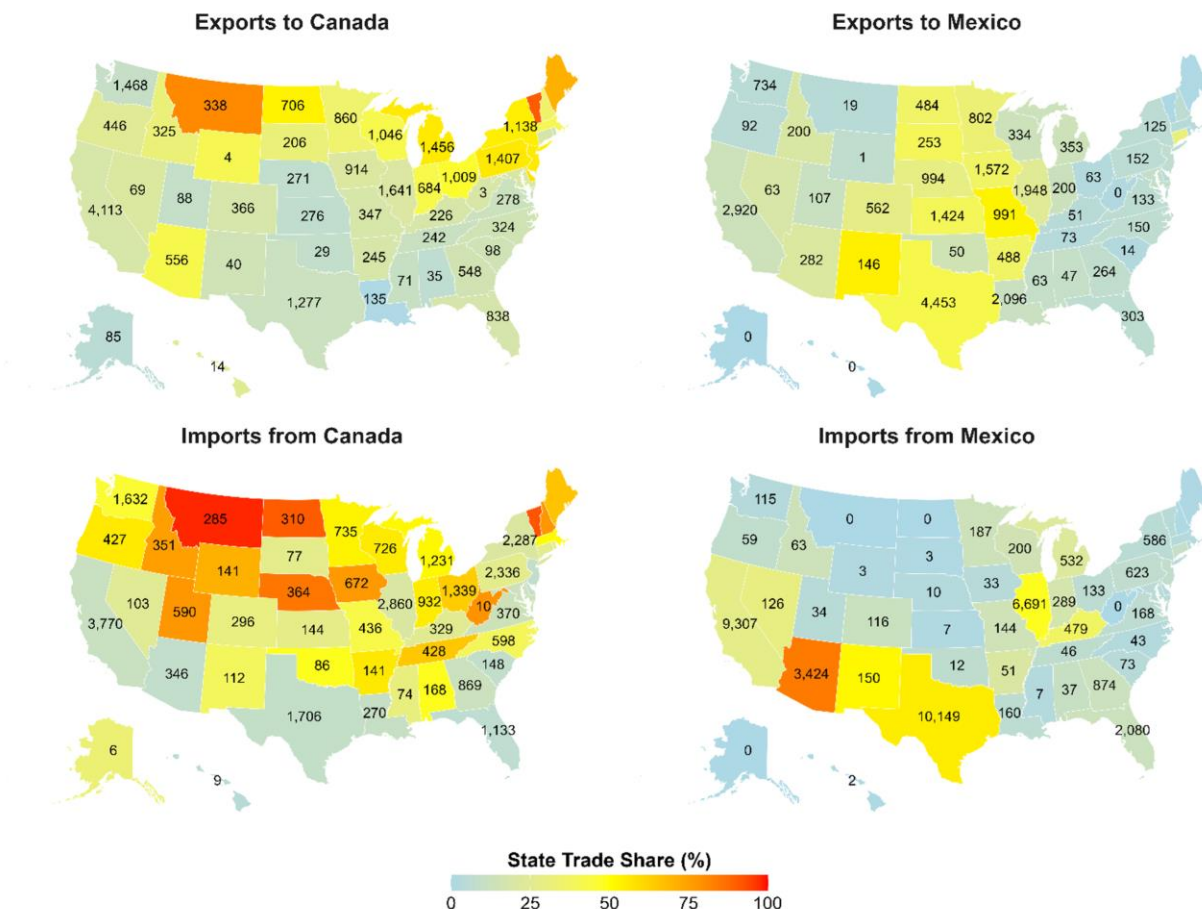
Notably, states like California and Texas stand out as exceptional cases, simultaneously functioning as both leading exporters and major importers. In these states, the effects of tariffs could vary significantly across different products and market participants. Tariffs that increase the cost of foreign goods may reduce competition for local farmers producing substitute products, potentially increasing their market shares. At the same time, local businesses reliant on imported inputs, such as processors and manufacturers, could become vulnerable to rising costs, leading to higher consumer prices or squeezed margins within the supply chain.

Trade with Canada and Mexico

Figure 2 illustrates the extent of US international trade dependence for agrifood products on Canada and Mexico. The top row maps each state's exports to Canada (left) and Mexico (right) as a share of its total global exports and the bottom row presents the corresponding import shares, both measured in US\$ millions. Darker shading indicates a higher share of a state's agricultural trade with each partner.

The left two panels show that states along the northern border, such as Montana, Wisconsin, Michigan, Vermont, and the Dakotas, appear highly integrated into

Figure 2. Share of State-Level Agrifood Exports and Imports with Canada and Mexico (US\$ millions)



Notes: The left panel shows the total export value with Canada and Mexico by origin state (in millions of USD), and the right panel shows the total import value with Canada and Mexico by destination state (in millions of USD). Commodities are grouped following the FAF5 dataset classification (similar to the HS code system; including beverage and tobaccos).

Canadian supply chains, particularly in *processed food and beverage products, meat and seafood, and non-cereal crops*. Midwestern and central states also import heavily from Canada, more intensively than southern states do, though border proximity intensifies exposure. The right two panels exhibit broadly similar patterns, with southern states (e.g., Texas, New Mexico, and Arizona) demonstrating strong reliance on Mexican markets and with some Midwestern and central states showing relatively higher export shares to Mexico. Across both panels, southeastern states generally show lower trade dependence on the two neighboring countries.

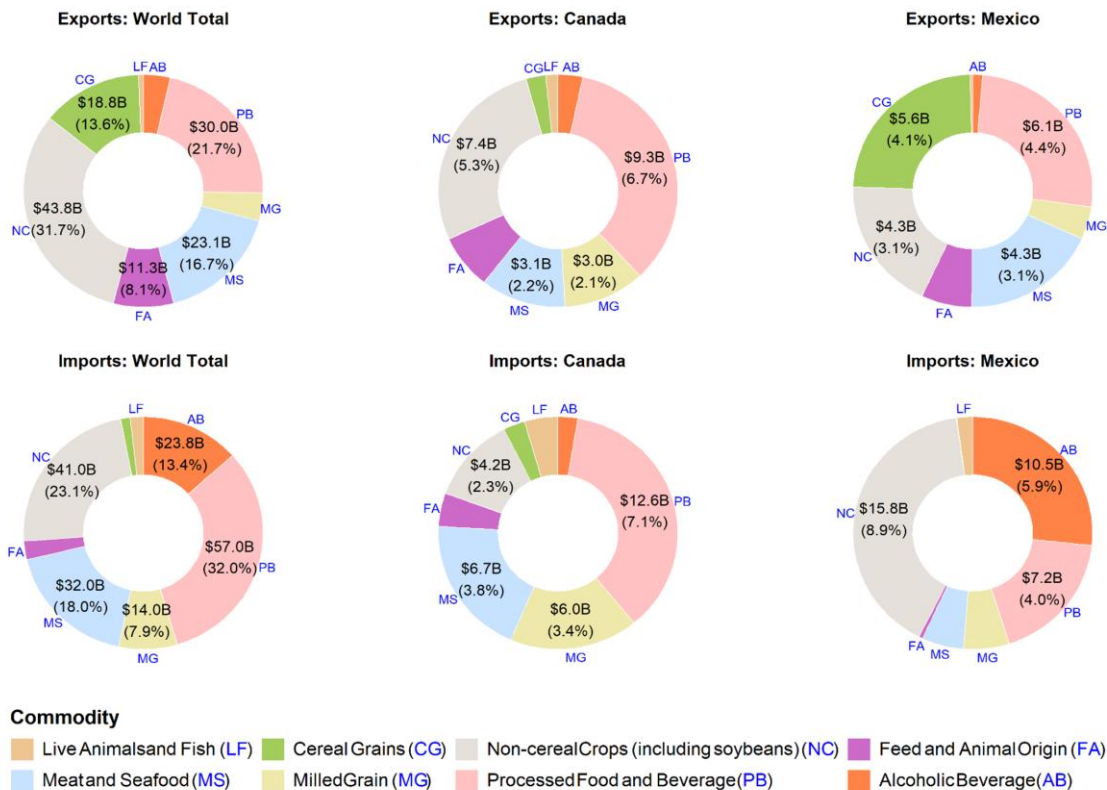
Overall, Figure 2 underscores that tariffs on Canada and Mexico have potential implications not only for the scale of trade but also for the degree of market integration. Moreover, regional asymmetries in trade exposure are pronounced: southern border states seem to depend more on Mexico (for non-cereal crop imports), and northern border states rely more on Canada (for meat, dairy, and processed foods). Importantly, the impact of

import tariffs might reach beyond the immediate importing states, since disruptions can propagate through broader supply chains and ultimately affect consumers nationwide.

Nationwide Sectoral Composition of US Agrifood Trade

Figure 3 summarizes the national composition of US international agricultural trade, presenting four pie charts that combine percentage shares and total values for each of the eight FAF5 commodity groups. The top row displays exports—first to all global destinations (left) and then specifically to Canada (middle) and Mexico (right)—while the bottom row shows imports, again divided between global markets (left) and Canada (left)/Mexico (right). Labels are provided for sectors accounting for at least 5% of total trade value in the total trade panels, and for those accounting for at least 2% of total trade value in the Canadian and Mexican panels.

Figure 3. 2024 US Trade Composition



Notes: Each pie slice displays the percentage share (shown in brackets) and total trade value (in US\$ billions). For simplicity, sectors with a share of 5% or more are labeled in the world trade chart, and those with a share of 2% or more are labeled in the Canada and Mexico trade charts.

Figure 3 shows that compared to its import profile US exports are concentrated in the commodity groups of *non-cereal crops* (particularly soybeans), *cereal grains*, *meat and seafood*, and *processed food and beverages*. Because a few sectors dominate export value, they could become prime targets for tariff retaliation, their vulnerability already having been realized in the recent trade dispute with China. In March 2025, China imposed retaliatory tariffs, adding a 15% tariff on key American farm products, including chicken, pork, soybeans, and beef (Wiseman, 2025). The EU likewise announced 25% tariffs on a broad range of US goods, such as almonds, effective April 15, 2025 (Rankin, 2025). Earlier, during the 2018–2020 US–China trade war, in July 2018, China imposed 25% retaliatory tariffs on US soybeans, pork, and other agricultural products, at a time when soybeans accounted for a substantial share of US exports (Klabunde, 2019).

Imports, by contrast, are dominated by consumer-oriented categories, such as *processed food and beverages*, *non-cereal crops* (particularly fresh fruits and vegetables), *meat and seafood*, *alcoholic beverages*, and *milled grain*. These patterns underscore US reliance on imported foods—especially processed foods, beverages, and specialty crops—suggesting

vulnerability to tariff-driven price shocks in these commodities

Regional Agrifood Trade with Canada and Mexico

Tables 1 and 2 report the regional share of US international agrifood trade with Canada and Mexico, disaggregated by FAF5 commodity categories. Table 1 presents export shares, while Table 2 reports imports. Export (import) shares are calculated as the ratio of each region’s exports (imports) to Canada or Mexico relative to its total global agricultural and food exports (imports) by each commodity group. Regions are classified according to US Census Bureau (2021) definitions.

On the export side, the Midwest and Northeast exhibit the highest dependence on Canadian markets. In the Northeast, a significant portion of agricultural exports are directed to Canada, as confirmed in Figure 2, including particularly high shares in *milled grain* (68.1%), *live animals and fish* (62.6%), and *non-cereal crops* (62.4%). The Midwest also relies heavily on exports to Canada of *live animals and fish* (57.5%) and *milled grain* (66.8%), while *cereal grains* are largely exported to Mexico (66.9%).

Table 1. Regional Agrifood Export Shares to Canada and Mexico (%)

Commodity	Midwest		Northeast		South		West	
	Canada	Mexico	Canada	Mexico	Canada	Mexico	Canada	Mexico
Live Animals and Fish	57.5%	9.8%	62.6%	0.9%	19.9%	11.7%	81.5%	7.6%
Cereal Grains	10.7%	66.9%	34.8%	2.2%	1.1%	29.3%	1.6%	1.5%
Non-cereal Crops	18.8%	29.4%	62.4%	3.3%	9.6%	5.6%	20.1%	8.2%
Feed and Animal Origin Products	29.2%	23.3%	49.2%	6.4%	5.2%	8.1%	7.5%	5.7%
Meat and Seafood	13.9%	13.3%	47.3%	2.5%	7.0%	29.7%	14.6%	14.0%
Milled Grain	66.8%	16.9%	66.1%	6.6%	33.4%	29.4%	47.5%	23.9%
Processed Food and Beverage	44.3%	23.2%	53.9%	8.5%	21.7%	25.2%	16.6%	20.5%
Alcoholic Beverage	44.3%	15.0%	35.6%	3.2%	5.5%	6.2%	35.3%	2.6%

Note: Regions are classified based on US Census Bureau definitions (2021). The export share to Canada for a given region is calculated by dividing that region's agricultural and food exports to Canada by its total agricultural and food exports to the world. The same calculation applies for the export share to Mexico.

On the import side, the Midwest shows a significant dependence on Canadian suppliers. Canadian shipments account for 90.4% of the region's imports of *live animals and fish* and 88.1% of *cereal grain* imports. At the same time, Mexico dominates in *alcoholic beverage* imports, accounting for 84.2% of the regional totals. The Northeast, while highly export-oriented toward Canada, records a lower overall share of Canadian imports, though 63.7% of its *live animal and fish* imports originate there. In the South, imports are more oriented toward Mexico, with high shares in *live animals and fish* (56.1%) as well as other agricultural products (37.2%). The West also relies heavily on Mexico, especially for other agricultural products (61.6%).

Overall, the patterns in Tables 1 and 2 indicate regional differences in trade reliance: The Midwest and Northeast are more connected to Canada, while the South and West depend more on Mexico, particularly for consumer imports. It is worth noting, however, that supply chain disruptions—such as those from import tariffs—can result in higher food prices and operational challenges throughout the country. These effects could propagate even into the states with less direct import activity, which highlights the importance of considering broader supply chain linkages when evaluating trade policy outcomes.

Concluding Remarks

This article describes and analyzes state-level patterns of the US agrifood trade in 2024 using the FAF5 dataset to assess potential exposure to the 2025 US tariff regime. The descriptive statistics highlight that tariff shocks might vary with regional production specialization, consumer demand, and geographic proximity to Canada and Mexico. Net-exporting states such as Louisiana and Washington are especially vulnerable to retaliation and reduced market access, while import-dependent regions would experience immediate cost pass-through to consumers with the ripple effects anticipated nationwide.

Crucially, the consequences extend beyond direct and immediate price shocks. By raising barriers against selected imports, tariff adjustments could shield segments of US farmers and food processors from foreign competition, thereby reshaping domestic competition. If sustained, these dynamics may also shift the comparative advantage that underpins US agriculture in international markets, eroding established strengths in some areas while fostering new ones elsewhere.

At the same time, the scope of United States-Mexico-Canada Agreement (USMCA) exemptions could

Table 2. Regional Agrifood Import Shares from Canada and Mexico (%)

Commodity	Midwest		Northeast		South		West	
	Canada	Mexico	Canada	Mexico	Canada	Mexico	Canada	Mexico
Live Animals and Fish	90.4%	0.3%	63.7%	0.0%	5.4%	56.1%	58.8%	28.1%
Cereal Grains	88.1%	0.3%	36.8%	0.0%	19.5%	2.3%	14.2%	1.6%
Other Ag Products	45.7%	26.1%	14.0%	3.8%	5.5%	37.2%	5.6%	61.6%
Feed and Animal Origin Products	40.1%	3.9%	35.1%	1.7%	15.3%	8.5%	47.7%	3.0%
Meat and Seafood	46.7%	3.7%	27.0%	0.6%	11.9%	7.6%	15.8%	14.7%
Milled Grain	61.3%	5.1%	30.7%	25.6%	43.1%	24.9%	41.3%	9.6%
Other Foods, Fats, and Oils	45.4%	11.4%	21.1%	3.8%	13.2%	21.0%	25.2%	11.6%
Alcoholic Beverage	3.7%	84.2%	2.3%	16.1%	6.1%	32.2%	3.1%	30.2%

Note: Regions are classified based on US Census Bureau definitions (2021).

significantly change the severity of these impacts.¹ Major imported products that are largely covered under the agreement include live animals (including horse and swine), vegetable oils, meat, and fish for Canadian imports and fruits and vegetables (including avocados, limes, raspberries, and strawberries) and food preparations for Mexican imports. These products would be partially insulated from tariff changes. By contrast, other high-value imports not covered by the agreement remain exposed, including live animals, meat, fish, dairy, and potassium for Canadian imports; and alcoholic beverages (including beer and tequila), confectionery and bakery products, and fruits (including blackberries, blueberries, and grapes) for Mexican imports. These items face greater risks, which could amplify consumer price pressures and intensify supply chain vulnerabilities.

These differences highlight how regional trade agreements shape the distribution of tariff burdens. They cushion some sectors while leaving others more exposed.

In sum, our findings suggest that tariff changes could generate disproportionate consequences across the country. Trade policies not only impose immediate economic and political effects but also reshape domestic competition and recalibrate the long-term comparative advantage of US exports in global markets. Mitigation efforts should therefore move beyond national aggregates, addressing the localized and sector-specific vulnerabilities to manage both the short-term shocks and the long-term stability of the US agrifood trade.

¹ The USMCA exemption product lists are obtained from Michigan State University professor Jason Miller. For more

details, please check out his website and analysis of the trade data such as Miller, Jin, and Ortega (2025).

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