



**BORDER POLICY
RESEARCH INSTITUTE**



ECONOMIC TIES AND CROSS-BORDER RELATIONSHIPS IN CASCADIA

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A “Culture of Collaboration”

THE IMPORTANCE OF COOPERATION TO THE CASCADIA REGION

01

Elements of cohesion:

- integrated business ecosystems
- interconnected transportation networks
- High levels of cross-border mobility for people and goods

02

Emerging challenges facing the Cascadia region:

- Border shocks
- Policy shifts

03

What is at stake in the current geopolitical climate?



CASCADIA

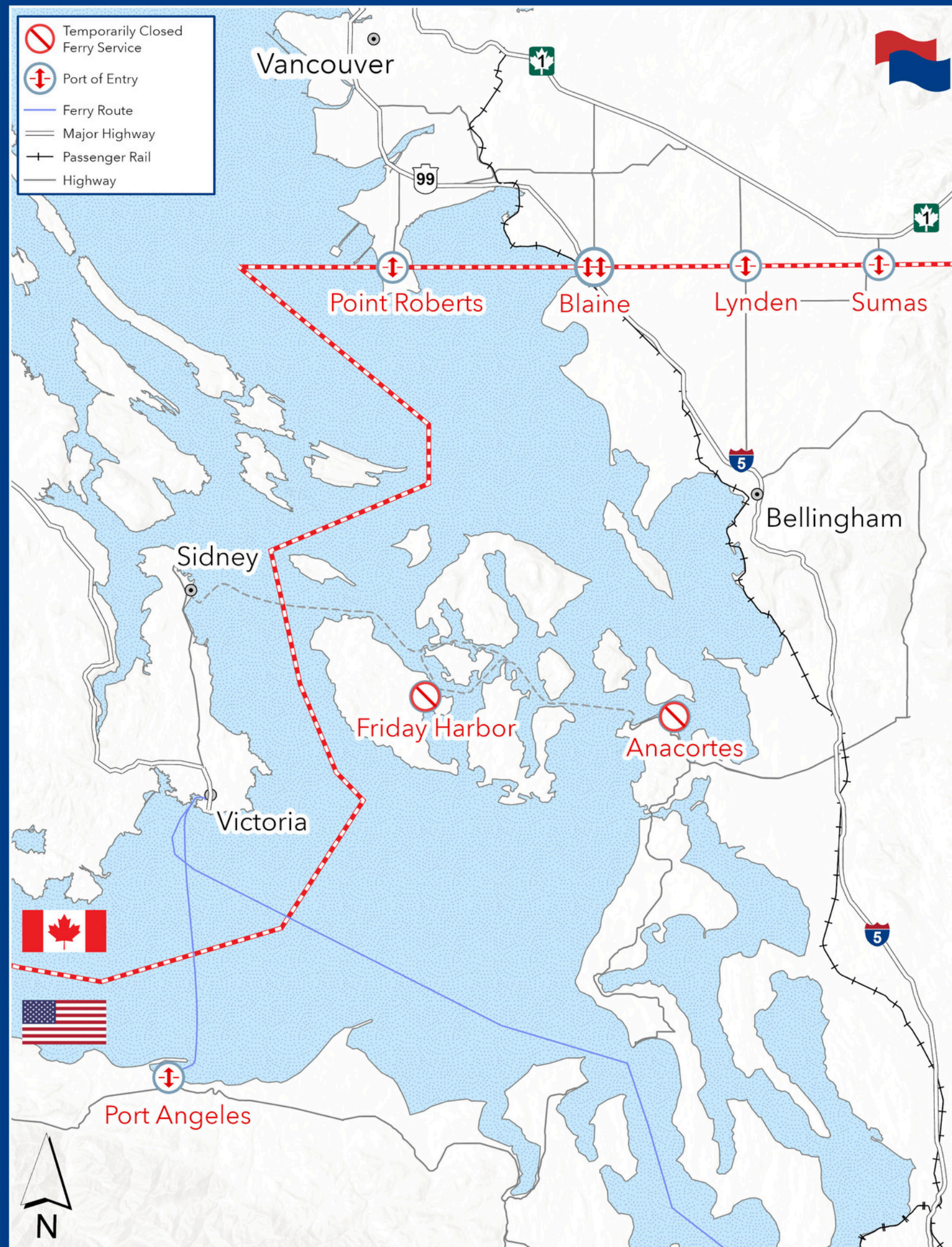
WASHINGTON - BRITISH COLUMBIA

Important cross-border corridor

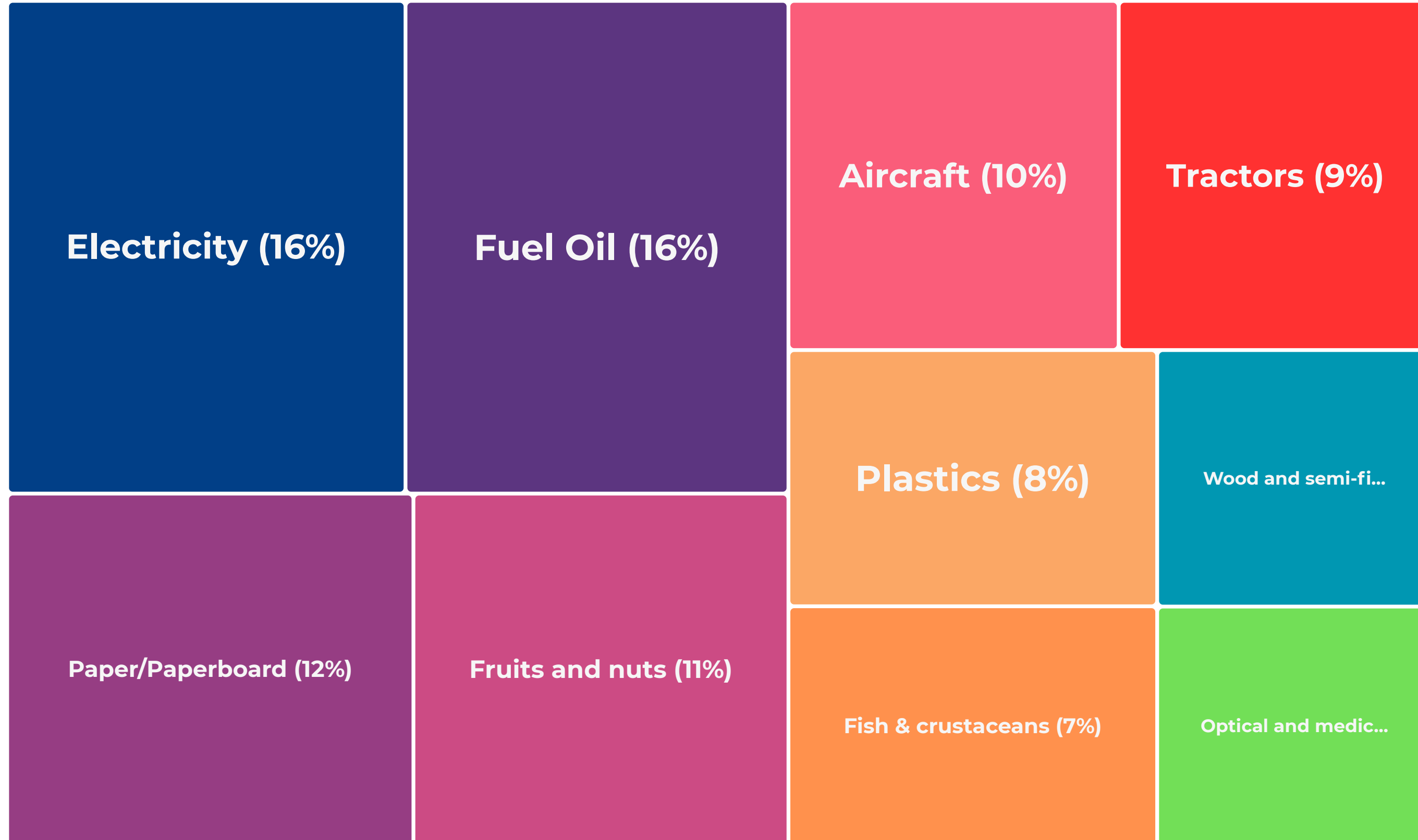
The border along British Columbia and Washington State includes the third busiest passenger border crossing between the US and Canada, located in Blaine, Washington.

Trade-Reliant

Many businesses and sectors in the Cascadia region rely on a functioning border and the Canada-US partnership to exist.

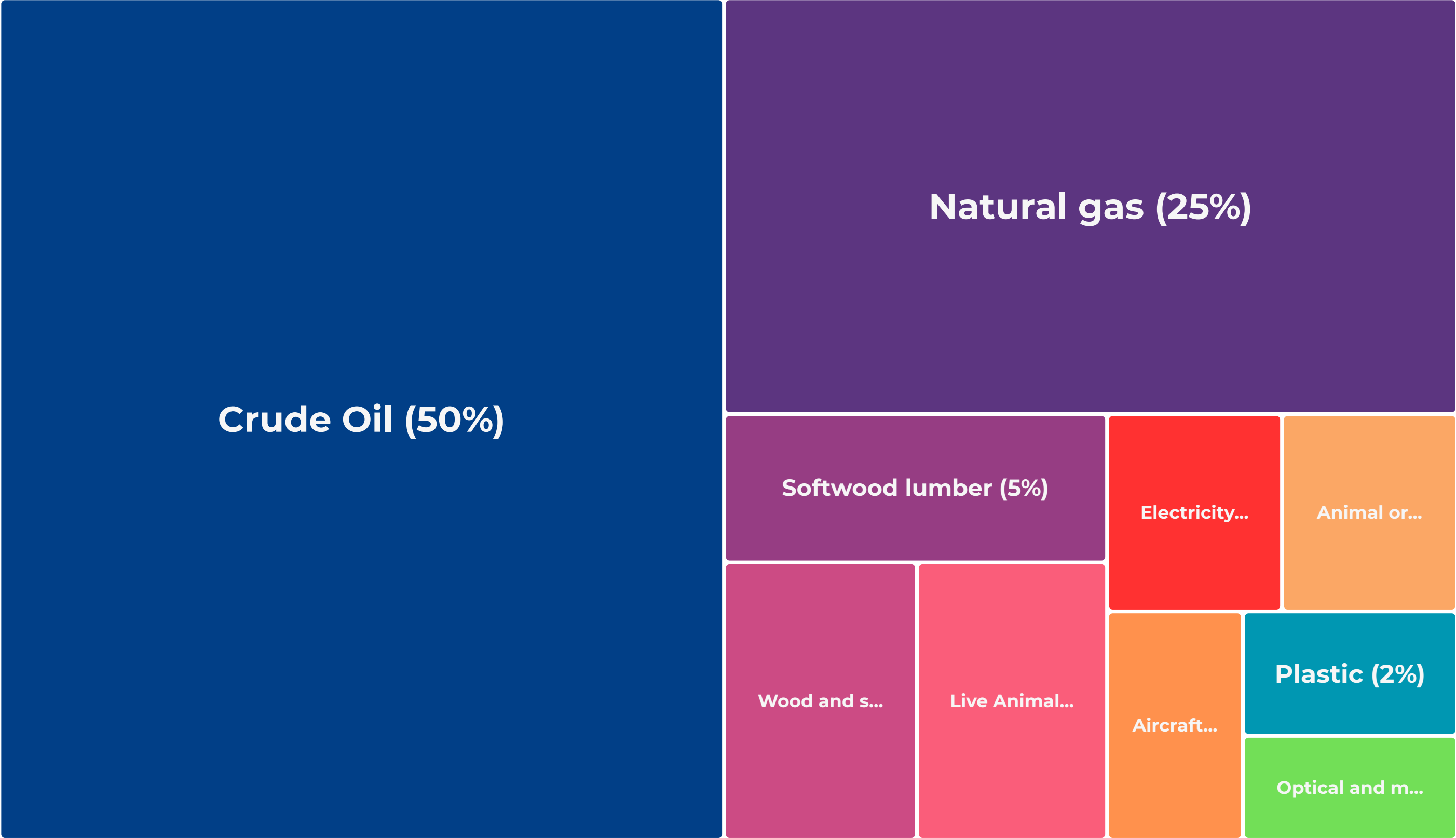


Quickstats: Washington to CA Exports



- Washington exported **\$7.9 billion** to **Canada** in **2024**

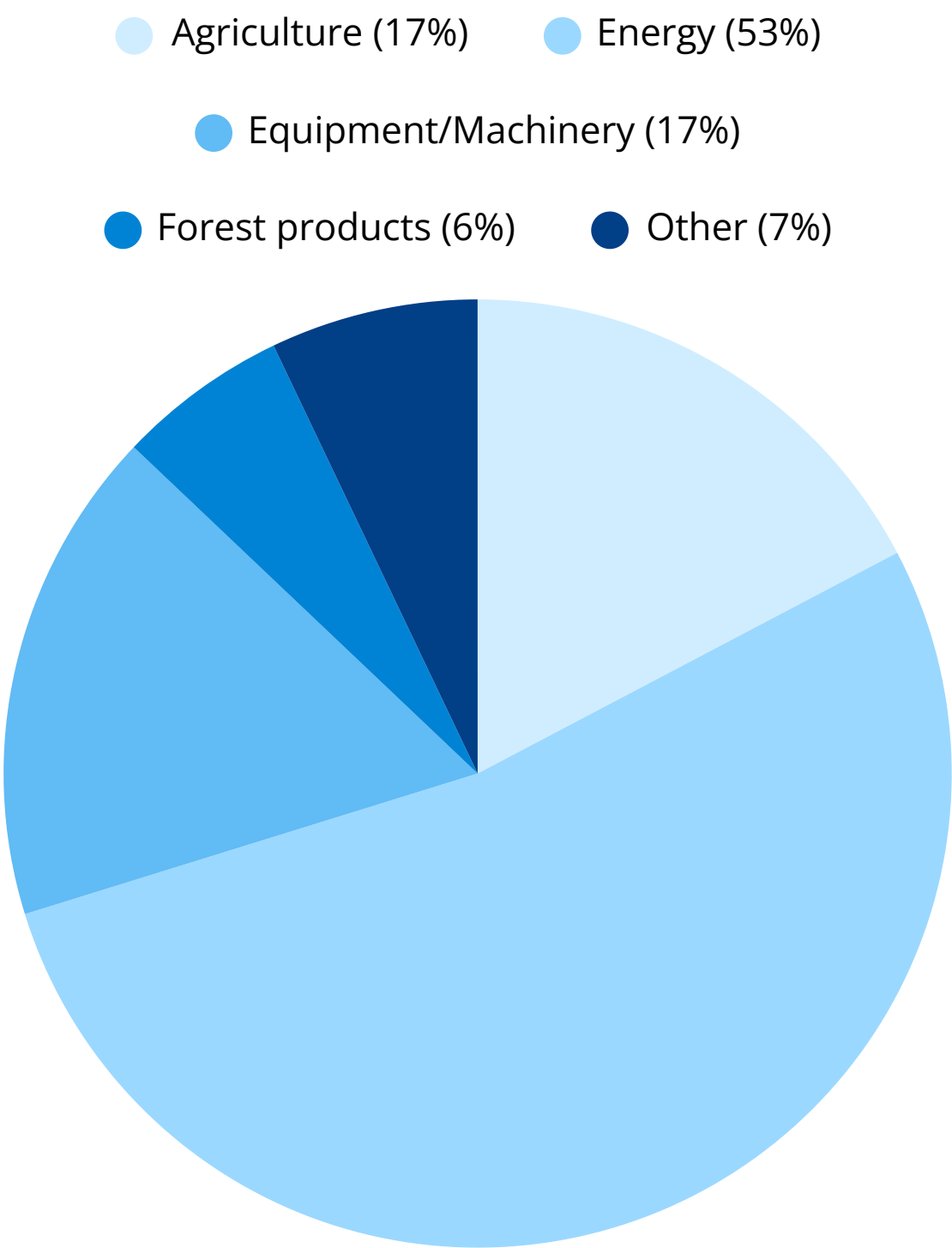
Quickstats: Washington Imports from CA



- Washington imported \$17.8 billion in goods from Canada in 2024

From Whatcom County to Canada

WHATCOM COUNTY GOODS & SERVICES EXPORTS



1,000 people are employed at the 61 Canadian-owned businesses operating in Whatcom County, and an additional 2,200 jobs depend on goods and services exports to Canada.

USD
\$480
million

Total Whatcom County goods exports to Canada annually

USD
\$134
million

Total Whatcom County services exports to Canada annually

THREATS

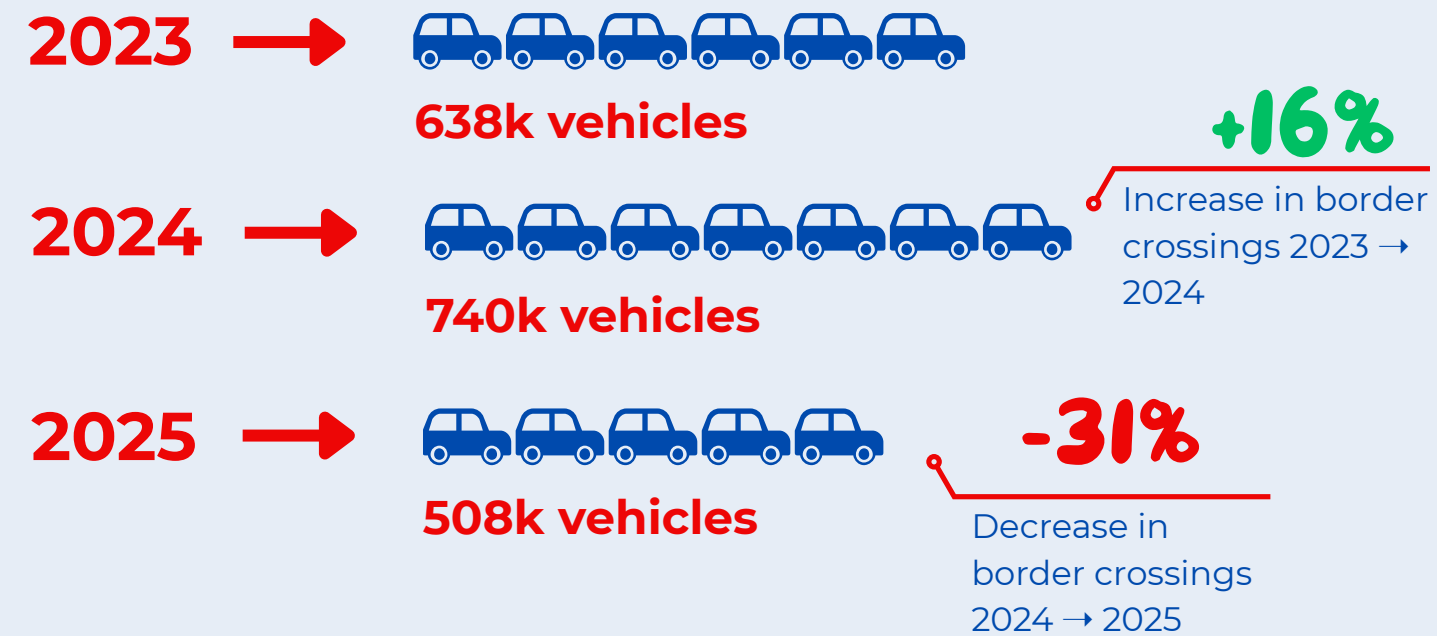
A STRONG RELATIONSHIP IS BEING WEAKENED

- Tariffs on Canadian goods of up to 25%, as well as retaliatory tariffs from Canada on American goods to match these policy measures, have a serious impact on local trade and collaboration.
- Shifts in bilateral relationships
 - heated rhetoric
- Border shocks: COVID, supply chain disruptions
- Hardening of the border on both sides



Quickstats: Cross-border travel

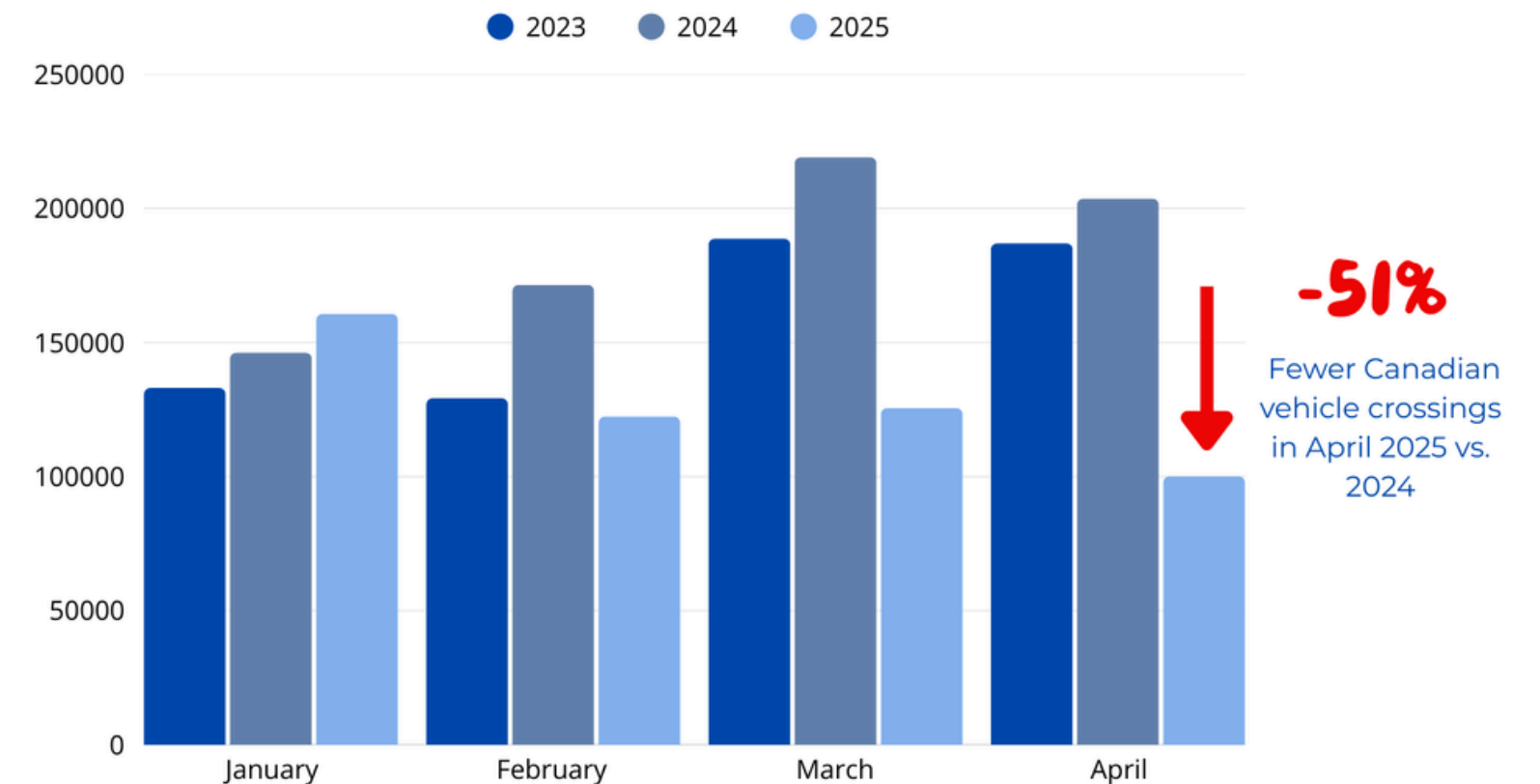
Yearly Trends From January → April



Canadian vehicle travel to Washington is dropping

Downward trajectory of Canadians crossing the border in year over year trends so far. This trend highlights the discretionary nature of travel in our region.

Breaking It Down: Canadian vehicle southbound monthly crossings, year over year trends



- Implications for retail sales tax
- Impacts to BLI
- cross-border transportation
- tourism/hospitality
- Relationships

COVID & THE BORDER



Stories from the border during COVID-19

An archive of stories from border communities.



Guidelines for visiting Peace Arch Park in Blaine, WA.



Increased illegal crossings cause tighter restrictions at Peace Arch Historical State Park



Border Patrol restricts Canadian access to Peace Arch Park

Increase in illegal crossings means Canadians will now have to cross border to access park

May 30, 2024 2:31 p.m.

Tariff impacts in Whatcom?



- Impacts will be industry specific and it's too early to accurately predict
- Lumber: Costs of a single-family home estimate to increase \$9k
- Washington relies on BC lumber.
- Electric Power: we import from BC, so energy bills could increase
- Steel & Aluminum: Over 300 manufacturing businesses in the County that may see machinery costs increase
- Many small businesses will likely struggle disproportionately

Tariff impacts in Whatcom?



Aluminum Cans & Washington Craft Beer

422

The number of craft breweries in Washington State, 21 of which are in Whatcom County

\$2 billion

The economic impact of craft breweries in Washington State in 2023



\$102 million

Whatcom County's craft brewery estimated economic impact in 2023, including beer sales, related taproom sales and jobs

2/3

The US sources 2/3 of the aluminum it uses from Canada. Even if all US smelters were at full production, it could not meet US demand for aluminum

75%

In early 2025 sales data, aluminum cans accounted for ~75% of packaged craft beer's volume and revenue

50% tariffs?

With a 25% tariff on aluminum the price for 12 aluminum cans would jump from ~\$3.60* to ~\$4.50

If stacked on top of a 25% tariff across all Canadian goods, the price jumps to ~\$5.40

*Price based on Stoup brewing reported expenses

Data from: Brewers Association; CDN; King5; Aluminum Association



Raspberries a Washington export

8,500

About 100 growers harvest over 8,500 acres in Whatcom county, making it the largest per capita crop of raspberries in the world

99%

Of WA raspberries came from Whatcom County in 2024



#1

Washington State leads the nation, producing 95% of the nation's processed raspberries

25% tariffs?

With 72%* of US' raspberry exports going to Canada, a 25% retaliatory tariff by Canada would impact millions of dollars worth of Whatcom County raspberries.

*Average of fresh and frozen raspberry exports

\$60 million

The value of processed US raspberries in 2020

Data from: USDA, 2025; Whatcom Farms; Redrazz.org; WSDA; USITC

WHAT NEXT?



01 Subnational cross-border collaborations

- Policy makers and stakeholders should proactively work together to navigate uncertain times.
- Senate Resolution 8641

02 Lessons Learned

- Knowledge sharing
- Engage and inform stakeholders

03 Sieze Opportunities

- FIFA World Cup
- Soft Diplomacy



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THANK YOU

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