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« The United States, geopolitics and the sea »

During the 2024 United States presidential election campaign, there was little doubt that a significant strategic shift could once again be enacted by Washington. As the prospect of a victory for the Democratic candidate of continuity faded, the reality of a second mandate for Donald Trump solidified, raising acute questions about the return to the global economy of the intense commercial and tariff wars previously executed between 2017 and 2020. Since his inauguration in January 2025, the new administration has fundamentally challenged the principles of free trade and the operational mechanics of economic globalization. Even more disruptive is the transactional diplomacy practiced by Donald Trump, transforming the landscape of international relations into an unmapped space defined by fluid partnerships and greenfield strategic cleavages. This study provides a retrospective review of a year of American actions across its multifaceted maritime dimensions.

Historical Perspectives of a Sovereign Maritime Power

Although frequently conceptualized through its vast continental dimension—notably within mainstream cultural imaginaries—the United States operates, by its very essence and historical narrative, as a nation profoundly tied to the sea. The American Revolution originally debuted in 1773 as a commercial dispute with the British Crown centered on an oppressive shipping monopoly. Once independent, the Thirteen Colonies immediately asserted themselves as a frontline maritime nation, backed by a dynamic merchant marine and a global whaling fleet.

The affairs of the world rapidly concerned Washington: driven by the imperative to safeguard its commercial neutrality, the young nation engaged in the "Quasi-War" at sea against revolutionary France, followed in 1801 by a naval intervention against the Barbary States of North Africa in the name of protecting its merchant shipping lanes. Subsequently, in 1853, it was a US Navy combat squadron (that forcefully triggered the commercial opening of Japan to world trade.

The secondary dimension of the sea for the young republic resides in its relentless territorial expansion and the extensive coastlines that accompanied it. In 1803, Napoleon sold Louisiana to Washington; the United States captured an immense continental space stretching between the Appalachians and the Rocky Mountains, but above all, secured absolute control over the Mississippi corridor, whose strategic maritime outlet was the Port of New Orleans. Following the War of 1812 with Great Britain—which solidified the structural impossibility of annexing Canada—the American geopolitical destiny turned resolutely toward the West.

Madrid was forced to cede Florida in 1823, creating a seamless maritime continuity between the Atlantic seaboard and the Gulf of Mexico. In 1836, Anglo-Saxon settlers in Texas executed a secession from Mexico, with the territory integrated into the Union in 1845, unlocking a massive southern maritime range. The following year, the Mexican-American War erupted, culminating in 1848 in a monumental territorial expansion that delivered California on the Pacific coast to Washington.

Two years prior, Washington and London had signed a treaty extending the international boundary along the 49th parallel all the way to the western ocean. North of California, the Oregon territory with the Port of Portland, and Washington State anchored by Seattle, completed the country's dual-ocean organization, while the Port of San Francisco capitalized intensely on the massive influx of migrants attracted by the Sierra Nevada Gold Rush.

The American Civil War was also inherently a high-intensity maritime war pitting the Union against the Confederacy. The Southern economy lived off its cotton exports, and the North's *Anacondaplan* naval blockade targeted its complete economic suffocation. Once national unity was restored, the United States purchased Alaska from the Russian Empire in 1867; while the immediate economic value of this subarctic space was relative, a titanesque maritime domain entered the Union, stretching from east to west along

the circular coastlines of the Gulf of Alaska and the Aleutian Islands, which spread across nearly 1,800 kilometers into the North Pacific. At the close of the century, the Klondike Gold Rush toward the Canadian Yukon heavily benefited Alaska, which had not yet revealed its true resource value.

The creation of the American Overseas empire was tightly linked to the sweeping imperialist and colonizing wave tearing through that era, impacting Western Europe, Meiji Japan, and the United States alike. Formulated in 1823, the Monroe Doctrine relied on the core principle of "*America for the Americans*," signaling, by echo, a geopolitical detachment from European continental entanglements. At that time, while Latin America was breaking away from Madrid's colonial grid, it was initially British commercial interests that captured paramount leverage across the newly independent states. The United States, entirely engaged in its internal convulsions and its own continental colonization driven by transcontinental railway grids, remained weakly involved in global overseas affairs.

Insertion Into the Global Geopolitical Concert

At the close of the 1890s, the Spanish colonial territory of Cuba, locked in active anti-colonial revolt, transformed into a major point of friction between Washington and Madrid. The brief Spanish-American War of 1898 concluded with a crushing American victory, dismantling the remains of Spain's overseas empire.

Under the presidency of William McKinley, Washington captured Puerto Rico, Guam within the Pacific Mariana archipelago, and the Philippines in exchange for a \$20 million financial settlement, although a bloody secondary military intervention was required to suppress the Filipino nationalist resistance.

That identical year, the formal annexation of Hawaii completed the United States' strategic embrace over the Pacific theater, while Cuba transitioned into a *de facto* American quasi-protectorate, and Guantanamo Bay was leased in perpetuity to become a major sovereign military and naval base. By 1900, participating actively in the international military intervention against the Boxer Rebellion in China, Washington firmly established its positioning within the concert of global imperialist superpowers.

Established on two oceans, the United States resumed the construction of the Panama Canal, which opened in 1914. The Americans had supported the secession of the territory from Colombia and obtained from the new independent State the permanent lease of the Canal Zone. The final purchase of the Danish Virgin Islands in 1917 completed the American overseas domain, which was nevertheless reduced by the independence of the Philippines in 1947.

The control of the canal went hand in hand with American interventionism in Central American and Caribbean States. The Monroe Doctrine was henceforth applied through a series of actions during the century for ideological reasons, specifically to counter the introduction of Marxist movements in the region; the only breach was the Cuban Revolution, which created a permanent point of fixation for the United States from 1959 onward.

The maritime dimension shifted during the 20th century. Although the country began global conflicts in neutrality, it ultimately engaged. After World War I, the Americans decided on the naval quota restriction of Japan, which ultimately led to direct conflict between the two nations. Emerging victorious in 1945, the United States entered the new geopolitical era of the Cold War against the USSR.

It was also a new economic era characterized by the creation of the Triad, formed with Western Europe and Japan. Containerization—an American invention of the 1950s—transformed into a structural oceanic link on both coasts.

The primary maritime dimension of the United States remains crude oil. Discovered in 1859 in Pennsylvania, the hydrocarbon was initially used for lighting and quickly built the fortune of the Rockefellers. The Second Industrial Revolution, driven by the internal combustion engine, triggered a massive demand for fuel. The immense domestic production of the country in California, the Gulf of Mexico, and Alaska was insufficient, and importations became mandatory to feed a highly energy-consuming consumer society.

The outputs of Mexico and Venezuela were the first to be imported. In the 1930s, the economic interests backed by Washington became involved in Saudi Arabia. This marked the beginning of the strong bond between the two nations centered on a geopolitics of black gold through several historic episodes. The United States became deeply involved in regional affairs by multiplying geopolitical axioms: including steadfast support for Israel and intense defiance toward Iran at the end of the 1970s, which operated as regional facets of the Cold War.

Although its conclusion was sealed in 1989 by the collapse of the USSR, the United States found itself deeply entangled in the Iraqi question with the Gulf War in 1991 and the military intervention in 2003. The

complexity of the region was exacerbated by Islamism, highlighted by the terrorist attacks of September 11, 2001. The American strategic burden in the region became exceptionally complicated, set against a backdrop of oil logistics, close alignment with Israel, Egypt, and Saudi Arabia, a massive naval presence in the Persian Gulf, hostility toward Iran, and the containment of radical Islamism.

Barack Obama intended to orchestrate a strategic "Pivot to Asia" toward the Pacific space, which had become a dominant hub of global economic prosperity; however, the Middle East continuously operated like a "black hole," sucking the rest of the world into its perpetual conflicts, the latest episode being the Hamas attack on Israeli territory and the subsequent war in Gaza at the end of 2023.

Maritime Geoeconomics of the United States

For 110 years, the USA has reigned as the world's premier economic nation. Historically, the country's prosperity has been built on a powerful cocktail of structural economic drivers:

- An abundance of domestic raw materials: coal, petroleum, shale gas, and mineral ores.
- A highly productivist agricultural model centered on mass grain and oilseed cultivation.
- The preservation of high-value manufacturing sectors: notably the automotive and aerospace industries, alongside advanced petrochemical and pharmaceutical clusters.
- The dynamic role of high-tech services driven by Silicon Valley and the global entertainment industry of Los Angeles.
- The financial supremacy of New York, powered by the immense leverage of investment banks, hedge funds, and pension funds.

American economic power is concentrated within corporate giants across all these sectors:

- In energy: Chevron, ExxonMobil, and ConocoPhillips.
- In agricultural trading: ADM, Cargill, and Bunge.
- In heavy industry: Boeing, General Motors, Ford, and General Electric.

In the maritime and logistics domain, mass retail corporations led by Walmart wield immense weight over inbound containerized imports, mirroring global tech giants that outsource the manufacturing of their devices to Asia.

The primary relationship binding the United States to the sea is rooted in its international foreign trade. The United States has transformed into a massive exporter of energy commodities. The first historically was coal, logging 98 million tonnes (Mt) exported in 2024 from East Coast ports.

Since the early 2010s, the industrial exploitation of shale oil and gas, predominantly located in the Central-Western basins, has fundamentally converted the country into a net exporter, shipping 85 Mt of LNG, 198 Mt of crude oil, and 283 Mt of refined petroleum products in 2024. This newly acquired energy superpower status carries immense geopolitical weight in both Middle Eastern and Euro-Ukrainian dossiers.

Symmetrically, the United States stands as a sovereign agricultural titan, anchoring global markets around the exportation of three major crops: wheat with 24 Mt during the 2024–2025 season, maize at 80 Mt, and soybeans at 42 Mt. However, this "green power" converts into a strategic vulnerability when it represents one of the very few commodity segments successfully sold to mainland China, rendering the agricultural communities of the American Midwest deeply attached to the preservation of multilateral free trade.

The United States maintains deeply ambivalent historical relations with free-trade frameworks. Highly protectionist and closed within the context of building the American domestic economy from the mid-19th to the mid-20th century, the free-trade doctrine subsequently transformed into Washington's unassailable consensus. The political and economic hegemony of its bloc relied fundamentally on free trade, a strategy that materialized in 1994 through the creation of the World Trade Organization and the sweeping reduction of tariff barriers on a planetary scale. The masterstroke of this policy unfolded with China's official accession to the WTO in 2001, a historic integration intensely desired and backed by Washington.

Free trade dynamically facilitated international cross-border investments and accelerated the physical transit of commodities, systematically fueling offshoring—the high-velocity mobility of manufacturing towards low-cost labor regions. American corporations aggressively deployed this model along the Mexican border and subsequently throughout the Far East, logging a powerful acceleration during the 2000s.

Consequently, the structural duopoly connecting the "Chinese Workshop" to the "American Supermarket" locked into place. American material comfort was sustained by unassailable access to cheap, mass-manufactured Chinese goods, yet was executed at the harsh structural price of severe domestic

deindustrialization—a fracturing process that had initiated, in truth, thirty years prior under the pressure of competitive European and Japanese imports.

The American colossus operates as one of the premier driving engines of globalization by mass-importing shipping containers along a regular growth curve. In 2019, inbound volumes scaled up to 21.6 million TEUs, and the intense retail hyper-consumption triggered during the pandemic lockdowns artificially propelled the metric to an extreme 25.5 million TEUs. Symmetrically, however, structural deindustrialization has drastically reduced outbound containerized export volumes.

To put these metrics into perspective, while the Americans contribute to masterminding approximately 10% of global container shipping traffic, the underlying corporate business does not profit them outside their proprietary port gateways. Indeed, although the United States historically invented the shipping container in the 1950s (Malcom McLean), American ocean liner groups comprehensively vanished from the global stage at the turn of the two centuries.

Wall Street and American finance permanently abandoned a sector judged too capital-intensive and weakly profitable. Today, globalized containerization has transformed into the exclusive domain of a handful of specialized European and Asian shipping conglomerates.

The American supermarket is continuously irrigated by globalized manufacturing streams channeled through international shipping lines. This is the hallmark of the hyper-globalized world; Western Europe, despite preserving a resilient industrial base, is forced to compose with high-tech hardware manufactured in Asia and driven by American proprietary software. While this architecture long operated as an acceptable, status-quo organization of the planet, it continuously fuels fierce political backlashes. The legacy critique on the left historically targeted global capitalism and its transnational corporations; the new contemporary critique on the right deploys a fiercely nationalistic reading of both politics and economics. It has resoundingly propelled Donald Trump back into executive power, sweeping global trade into a whirlwind of fast-moving geopolitical and macroeconomic dossiers to the point of analytical exhaustion.

Maritime America in the Era of Trumpism

The baseline principle of a secondary wave of aggressive counter-offensives targeting free trade was well known and long-announced; however, the premier element that strikes observers within this new presidential mandate features acute geopolitical reconfigurations, materializing in an almost absurd form of neo-imperialism and territorial annexationism voiced directly by the President¹. Denuded of administrative filters or standard diplomatic prudence, the American President has resoundingly and unambiguously raised the concept of a multi-territorial "integrationist takeover".

The premier target was Canada—a sovereign, independent nation, historical heir to the North American loyalists who remained faithful to London, which has economically structured a highly integrated duopoly alongside its massive neighbor under NAFTA since 1996. Projecting to convert Canada into a titanesque 51st State commands zero logical sense and lacks any viable perspective; yet, it profoundly exasperates the Canadian citizenry, most distinctively as Donald Trump continuously contests North American free-trade treaties, branding both Mexico and Canada as parasitic economic profiteers.

Vastly more actionable on a practical level was the formal invocation of a mandatory retrocession of the Panama Canal. Following the milestone Torrijos-Carter Treaties of 1977, the interoceanic waterway—alongside its surrounding Canal Zone territorial strip—was fully restored to Panamanian sovereignty in December 1999. Throughout the 2010s, the nation heavily invested in engineering a pair of giant neopanamax locks to completely reformat its canal parameters.

That this maritime corridor operates as ultra-strategic for the US Navy to dynamically deploy its surface combatants is certain; that it serves as a vital artery for seaborne trade loops interconnecting China (containerized imports) and the United States (agricultural grain and shale gas exports) is unassailable. Yet, in the 21st century, holding direct colonial control over the canal is denuded of genuine geostrategic purpose, as no international player doubts Panama's absolute operational neutrality. Is the transit toll too expensive for American-flagged shipping? In no event, especially since the very concept of an American-registered commercial merchant vessel has nearly ceased to exist on global blue waters.

This box of geostrategic fantasies—which reads like a contemporary remake of John le Carré's *The Tailor of Panama*—focuses on the container terminals concessioned to HPH, a private port management

¹ The case of Venezuela is rooted not in territorial annexation, but in the nature of its political regime and its utilization of crude oil, which has historically functioned as a structural pillar for the American refining apparatus.

conglomerate based in Hong Kong, and appears heavily far-fetched. These maritime terminals do not function as geopolitical tools of hard power for Beijing; the ultimate tool of state power remains the macro-commerce itself executed with the United States.

Indeed, HPH stood fully prepared to divest from its Panamanian terminal assets prior to entering active acquisition negotiations to be corporate-bought by the shipping giant MSC and the powerful global asset management colossus BlackRock. Now, however, it is Beijing that is sovereignly auditing the ultimate corporate destiny of the Hong Kong-based port operator.

Further north, during the 16th century, Denmark had permanently integrated the vast landmass of Greenland into its sovereign territorial domain. Exceptionally sparsely populated, fully autonomous, and remaining outside the European Union, Greenland historically lived out its quiet destiny, albeit increasingly worried by the rapid acceleration of subarctic climate change and the industrial perspectives of deep-seated rare earth mining exploitation.

While Copenhagen has resoundingly and repeatedly rejected Washington's historical offers to purchase the island, it has never denied American military footprint requests, notably supporting the geostrategic architectures of the US Armed Forces in the Arctic range (. The formal demand for a geopolitical takeover re-ignited by Donald Trump in January 2026 raises multi-layered systemic questions. Allied European nations backing Denmark stand profoundly afflicted by this widening fracture tearing through the transatlantic bond, upon which the entire geostrategic balance of the Western world has been unassailably anchored since 1945.

Denmark and Greenland hold zero structural opposition toward American defense imperatives and critical mining resources (notably rare earth elements), yet stand unyielding against any geopolitical annexation. As for the maritime dimension concerning the Northeast Passage, mapping out territorial pretensions there is inherently absurd given Greenland's geographical location and subarctic climatic conditions. To invoke imminent Russian or, even more so, Chinese structural threats across this range is merely a part of the geostrategic phantasmagoria characteristic of Trumpism.

Trump actively nourishes an anxiety-inducing global landscape through an aggressive approach targeting the immediate margins of the United States, while simultaneously operating as a transactional peacemaker. His highly personalized diplomacy attempts to bring Moscow to reason in Ukraine, maintaining a deep ambivalence in relations with Kyiv and its European allies. On one side, Washington has remained exceptionally active within the legal and sanctions warfare waged against Russia regarding physical commodities and maritime shipping networks; on the other side, a form of diplomatic accommodation with Vladimir Putin unfolds, translating into a visible tolerance for aggressive autocrats.

The alternative conflict defining the contemporary era remains the Israeli-Palestinian war in Gaza, coupled with the armed involvement of Yemen's Houthi rebels. American heavy military and naval hardware was intensely deployed under the operational umbrella of Washington's strategic alliance with Israel. Donald Trump's transactional contribution materialized through the implementation of the current ceasefire in late 2025, carrying the still-unverified hope of a definitive cessation of asymmetric attacks targeting Western-linked merchant shipping, enabling their long-awaited return to the Suez Canal route.

Consequently, there exists a structural hope that the pacifist face of Donald Trump can operate usefully for the planet. The American President's perception of the world remains entirely personalized, structured around a fluid landscape of friends and enemies—allies to be bullied and adversaries to be flattered. The advisory "Peace Council" stands as the most preposterous manifestation of his Trumpian universe.

This deep contempt for the United Nations moves hand in hand with a systematic withdrawal from most transnational organizations. Remaining a voting member within the International Maritime Organization, Washington forcefully demonstrated its structural rejection of climate change frameworks, spearheading an alliance of nations in the autumn of 2025 to successfully enforce a one-year postponement of the next mandatory phase of global maritime decarbonization regulations.

This annexationism of proximities combined with diplomatic chaos thoroughly shatters the political order of multipolarity that had structured global geopolitics across the preceding decade. Trumpism concurrently targets the macroeconomic theater, violently challenging the foundations of free trade on an exponentially multiplied scale. The warnings voiced during the presidential campaign and enacted during the initial days of the executive mandate materialised the end of unrestricted free trade, confirmed on April 2, 2025, by the landmark "Liberation Day" declaration, when Donald Trump exposed sweeping customs tariffs imposed on the entire planet.

Immediately, an emergency moratorium was unlocked, enabling foreign capitals and the European Union to actively negotiate their tariff adjustments. Western Europe successfully extracted a capped 15% customs levy, matching the exceptions granted to Japan and South Korea, while the ASEAN nations aligned around a 20% tariff baseline. With mainland China, the geoeconomic trajectory remains profoundly erratic, fracturing into alternating phases of extreme escalation—marked by retaliatory tariff surenchères throughout the spring, a total Chinese boycott of American soybeans, and a reciprocal Beijing embargo on rare earth elements—and sudden transactional accommodations.

The global shipping industry is equally mandated to compose with the targeted American tariffs orchestrated by the Office of the United States Trade Representative. Pursuant to initial executive orders, every single merchant vessel constructed inside Chinese shipyards making port-of-call at a US gateway was statutorily required to pay a specialized penalizing tariff—a draconian measure ultimately postponed for one year in October 2025.

The legislative roots of this friction precede the current mandate, stemming from the Ship Act of 2024, which aimed to forcefully revitalize the dying national commercial shipbuilding base. Yet, this mechanism transitions through contemporary markets as a presidential whim (*une lubie*) fundamentally impossible to implement in practice for a nation that permanently lost its heavy merchant industrial shipbuilding capability several decades ago.

As a macro-historical reminder, the United States rigidly enforces the legacy Jones Act of 1920, which imposes strict obligations of domestic hull construction, American corporate ownership, US crew manning, and national flag registration for any vessel active within coastwise cabotage and domestic maritime activities. Attempting to entirely rebuild a competitive national industrial base capable of manufacturing large-scale ocean-going commercial vessels from scratch represents a monumental, unrealistic challenge.

Evidentially, Chinese-manufactured commodities have turned significantly more expensive, triggering an approximate 20% contraction in Chinese containerized imports entering the United States. The transpacific freight flow between January and November recorded a 3.5% decline, while transatlantic container lines registered a structural stability at 0.6%.

Concurrently, overall US importations across the 2025 calendar year contracted by 2.5%; yet, they still scaled up to a massive volume of 25 million TEUs—marking a powerful +18% expansion compared to the pre-pandemic 2019 baseline.

Consequently, the United States continuously consumes monumental volumes of imported manufactured goods, validating the supremacy of what macroeconomists define as a "civilizational consumerism". In the absolute absence of structured, long-term federal public capital policies, expecting a wholesale domestic industrial re-shoring remains a pious wish.

Ultimately, Donald Trump's geopolitical chaos raises existential questions, brandishing the permanent specter of a catastrophic transatlantic fracture tearing through the Western world, balanced uniquely by the transactional hope of a definitive end to the war in Ukraine. On the globalization front, while wounds to free-trade frameworks are manifest, the underlying liberal principles driving global economic interdependence remain structurally locked into place.

The *Make America Great Again* doctrine repeatedly collides with the hard realism of 21st-century macroeconomics and the ideological impasses of Trumpism itself. The secondary systemic fear was cyclical, anticipating that a sharp contraction of the American domestic economy would mechanically drag the rest of the planet into a global recession. This has not materialized.

What will 2026 hold in terms of both economics and geopolitics? It remains impossible to precisely forecast; the globalized planet operates like a fragile vessel swept away within the high-velocity currents of an unpredictable torrent, masterminded and piloted by a single man governing the single largest superpower on earth. Courage...

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