

KEYNOTE

# Special Forces at the Border

*Why the Next Decade of AI  
Runs Through Laredo*

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London Consulting Group®

HOSTED BY

**Laredo Economic  
Development Corporation**

EVENT

**Laredo Economic Development Week**

*More Than Advise, We Transform,*

# 20,000 trucks a day.

*Every one of them is a small business.*



# Laredo, by the numbers

*What this corridor moved in 2025*

~\$800B

Total annual trade value  
through Port Laredo

*Industry estimates, 2025*

~20,000

Commercial truck crossings  
per day

*Bureau of Transportation Statistics, 2025*

~35%

Of all U.S.–Mexico  
binational trade

*Bureau of Transportation Statistics, 2025*



ACT 1

# What Is AI, Actually?

*Five functions.  
One metaphor.  
No jargon.*

# AI in plain English

*Five things software can now do that, until recently, only people could do well.*

1

## PREDICT

Which truck will need brake work in the next two weeks.

2

## SUMMARIZE

Today's bills of lading, customs declarations, and exception emails, into one page.

3

## AUTOMATE

Pre-filling the ACE eManifest from a scanned bill of lading.

4

## RECOMMEND

The optimal route for a specific load, lane, driver, and weather window.

5

## DETECT

An unsafe behavior on a construction site the moment it happens.

# The bottleneck is not the technology.

*You cannot run Microsoft 365 on a computer that is still running Windows 95.*

WITHOUT THE WORK

## Windows 95

Broken processes. Fragmented data.  
No line manager accountable.  
The AI tool exposes every crack faster.



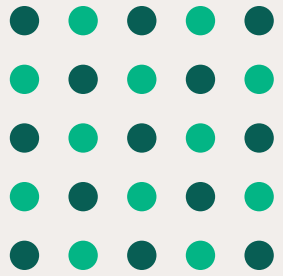
DOING THE WORK

## Microsoft 365

Clean processes. Trustworthy data.  
Line managers, not labs, driving adoption.  
AI amplifies what is already strong.

# AI is already here.

*It is not the question of whether. It is already the question of how well.*



# 88%

of organizations report using AI in at least one business function.

*Stanford HAI, AI Index Report 2026 (April 2026)*

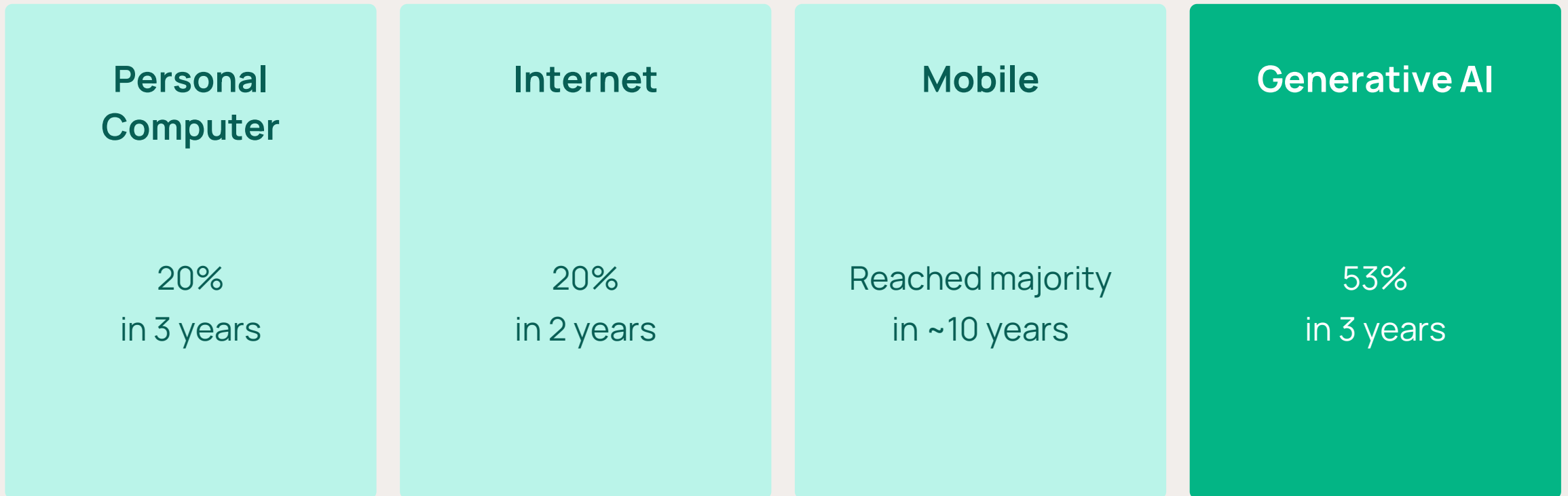
ACT 2

# The Scale of What Is Happening

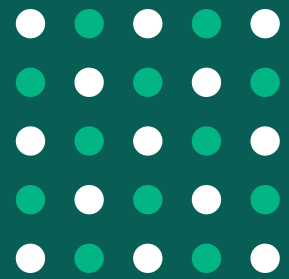
*Faster than the PC.  
Faster than the internet.  
And accelerating.*

# The fastest adoption curve in technology history.

*Years to reach 50% global population adoption: a comparison.*



# Worldwide AI spending in 2026.



# \$2.52T

+44% year over year. AI infrastructure alone adds \$401B.

*Gartner, January 2026*

# U.S. small and mid-market firms are catching up fast.

*Adoption rate among U.S. SMBs (50–499 employees), in at least one process.*

A YEAR AGO

23%

of U.S. SMBs using AI

TODAY

42%

of U.S. SMBs using AI

*The large-vs-small adoption gap closed from 1.8× to 1.2× in 18 months.*

*U.S. Census Business Trends and Outlook Survey; SBA Office of Advocacy, 2025–2026*

# What changed in twenty-four months

*Three capability shifts that are going to matter for your business.*

1

## Agents That Finish Tasks

AI agent task success on real computer work jumped from 12% to ~66% in roughly a year. Gartner: 40% of enterprise apps will have AI agents by end of 2026.

2

## Expert-Level Reasoning

Frontier models now match or exceed human baselines on PhD-level science, competition mathematics, and multimodal reasoning.

3

## Software Built Faster

AI coding tools sustain focus on complex tasks for 30+ hours with 77% accuracy on real-world software engineering benchmarks.

ACT 3

# What This Means for Laredo

*Trade.*

*The data center  
at our doorstep.*

*A city at a crossroads.*



## THE GATEWAY

**The most important freight city in the United States most of the United States has never heard of.**

*Number-one inland port. One-third of regional jobs in trade, transport, and warehousing.*

# AI is going after the line items in your P&L.

*Not your driver's job. The breakdown. The empty mile. The customs broker hour.*

## Predictive maintenance

89% accuracy. 73% fewer emergency repairs.

## Route optimization

10–20% fewer miles. 97%+ on-time delivery.

## Customs document automation

Pedimento, ACE eManifest pre-fill. Hours → minutes.

## Demand forecasting

Predict load volume by lane and corridor.

## Smart fleet tracking

Real-time visibility, exception alerts, asset utilization.

## Driver retention analytics

Identify churn risk before the resignation.

# The room you are running your business inside.

*What ATRI's 2025 Operational Costs of Trucking report tells us about 2024.*

**\$2.260**

*/mile*

Total operating cost; highest non-fuel cost  
ATRI has ever recorded

**\$0.102**

*/mile*

Truck insurance premium; also a record.  
+36% over 8 years

**-2.3%**

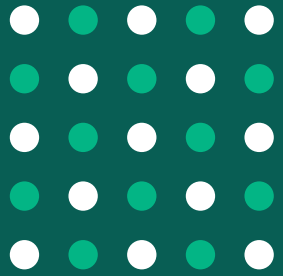
*margin*

Truckload sector average operating margin  
in 2024

***13 consecutive quarters of weak demand. Carrier bankruptcies at the highest rate ever recorded.***

# The MIT Sloan finding.

*AI now impacts U.S. transportation workers, but the dominant pattern is augmentation.*



1.1M

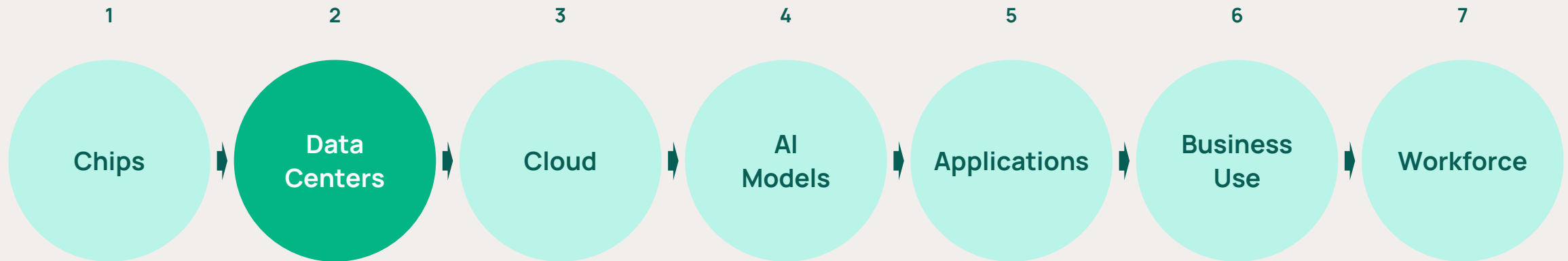
Transportation workers impacted by AI.

*Most exposed roles: cargo and freight agents, freight forwarders, inventory clerks, reservation agents.*

**Where does  
AI actually live,  
and what does it need to run?**

# The AI supply chain in seven steps.

*Headlines live at the upstream end. Laredo lives at the downstream end. The middle is the bridge.*



*Data centers are the node that connects the upstream economy to ours.*

*And one of those nodes is going up twenty miles outside this room.*

TWENTY MILES FROM HERE

# Data City, Texas

50,000

acres outside Laredo

5 GW

capacity at full build-out

Phase 1

300 MW launching in 2026



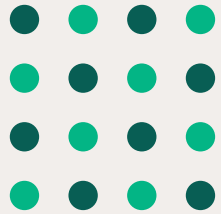
*This Photo* by Unknown Author is licensed under [CC BY-NC](https://creativecommons.org/licenses/by-nc/4.0/)

*Behind-the-meter power. 100% green energy at full transition.*

*Energy Abundance Development Corporation, March 2025*

# The construction story is real.

*And what locates around the campus is the larger long-term story.*



\$3 T

Global data center investment forecast through 2030: the largest infrastructure supercycle in modern history.

*Texas is forecast to overtake Virginia as the global data center leader.*

*JLL 2026 Global Data Center Outlook*

# Laredo's strategic assets.

*Five things this city has that very few border cities can replicate.*

1

## Geography & Land

50,000+ contiguous acres near major energy resources.

2

## Border Position

120,000+ skilled, bilingual workers across 58 industrial parks.

3

## Energy

Texas natural gas, hydrogen development, behind-the-meter capability.

4

## Logistics

I-35 terminus, 24/7 customs at airport, rail, World Trade Bridge.

5

## Joint Inspection

Unique U.S.-Mexico inspection model at the port; no other city has this.

ACT 4

# The Next Generation

*What we owe  
the young person  
who will graduate  
in 2030.*

# By 2030: the WEF math.

*Net positive, but the transition will not be evenly distributed.*

DISPLACED

92 M

Jobs displaced by 2030

CREATED

170 M

New jobs created by 2030

***Net: +78 million by 2030, but the transition will be uneven.***

# What employers will pay for through 2030.

*Five skills: named with one-line behaviors, not slogans.*

1

## Analytical Thinking

Break a problem down. Reason about it. The #1 most-demanded core skill, 69% of employers.

2

## AI & Big-Data Literacy

Not the ability to build AI. The ability to use it well. The fastest-rising technical skill.

3

## Resilience, Flexibility & Agility

Adjust when the work changes underneath you. 67% of employers, and rising.

4

## Curiosity & Lifelong Learning

The first hour of every Tuesday morning learning something you did not know on Monday.

5

## Creative Thinking

The durable human edge: the ability to ask a question the AI did not know to ask.

*The students are ahead of  
the institutions. Everywhere.  
Which means the people who fill  
the gap include us.*

*Stanford HAI, AI Index 2026: only 6% of teachers say their schools' AI policies are clear.*

ONE QUESTION

**What do we owe the young person  
who will graduate into this economy in 2030,  
and what are we doing this year  
that earns us the right to say it?**

*Thank you.*

LET'S CONTINUE THE CONVERSATION

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