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POLICY PAPER

Trump, Tariffs, and the End of Free Trade

WHAT SHOULD WORKERS DO?

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Trump, Tariffs, and the End of Free Trade: What Should Workers Do?

THE EXECUTIVE ORDERS

Following his inauguration on January 20, 2025, U.S. President Donald Trump launched an unprovoked, ill-informed, and alarming campaign of economic and political intimidation against Canada. With a rude and ungracious manner lacking any pretense of decorum and diplomacy, the President proclaimed a series of shocking, disrespectful, and deranged executive orders and public statements, unheard of in Canada's 158-year relationship with the U.S. Trump repeatedly belittled and insulted Canada's Prime Minister, and he has openly mused about using "economic force" to annex Canada, as part of a broader imperial strategy of territorial expansion (potentially including Greenland, Panama, and Gaza).

And if that's not enough, Trump has threatened Canada's economy by imposing tariffs, in clear violation of the free trade and investment agreement governing Mexico, Canada, and the United States known in Canada as the Canada-United States-Mexico Agreement (CUSMA). This includes reimposing a global 25-per-cent tariff on steel and aluminum in violation of a deal reached on May 17, 2019[1]

to remove national security tariffs unilaterally imposed under Section 232 of the U.S. *Trade Expansion Act* of 1962. The executive branch of government has no constitutional authority to unilaterally and arbitrarily ignore or violate treaties and laws but needs the approval of the legislative branch, the Congress of the United States. To bypass Congress, Trump justified violating CUSMA by invoking the *International Emergency Economic Powers Act*, an executive authority that allows him to respond to emergencies through economic means, to apply the tariffs without needing congressional approval.

This situation is unprecedented, posing an existential threat to Canada. We must pursue strategic and assertive responses to protect the economic interests of workers.

WHAT IS A TARIFF?

A tariff is a tax or duty imposed by a government on imported or exported goods. This tax is typically added to the price of goods when they cross international borders, and it can vary depending on the type of product and the trading countries involved. Governments use tariffs to regulate trade, protect local industries, and generate revenue. They can be classified into two main types: import tariffs, which apply to goods coming into a country, and export tariffs, which are applied to goods leaving a country, though the latter are less common. Tariffs can serve multiple purposes. They can help shield domestic businesses from foreign competition by making imported goods more expensive, thereby encouraging consumers to buy locally produced products. Additionally, tariffs are sometimes used as a tool in trade negotiations or a response to unfair trade practices. Tariffs can protect local jobs and industries. They can also lead to higher prices for consumers, potentially disrupting global trade and affecting diplomatic relations between countries.

WHY IS THE U.S. IMPOSING TARIFFS?

There has been speculation about the reasons why Trump is imposing tariffs. The clearest explanation was offered by U.S. Commerce Secretary Howard Lutnick at his January 30, 2025[2] Senate confirmation hearing. In this testimony, Lutnick talked about two purposes for the proposed tariffs:

a. one is what he called "an action-oriented model" in which the tariff is used as "an action of domestic policy." He admitted that this "is not a tariff *per se*" and
b. he contrasted this from what he called "the ordinary tariff" which is something that needs to be "studied and examined."

TARIFF AS AN ACTION OF DOMESTIC POLICY: THREATENING OTHER STATES

As an action of domestic policy, the tariff is a tool, and a threat, to extract concessions or negotiating leverage from other sovereign states. For example, in January 2025 Trump threatened Colombia[3] with a 25% tariff when President Gustavo Petro initially refused to accept two US military aircraft with Colombian citizens deported from the U.S.

With Canada and Mexico, tariffs are supposed to extract concessions in 2 ways:

a. to put the U.S. in a favorable negotiating position regarding the renewal of CUSMA, scheduled in 2026; and to pressure Canada to address a trade deficit, an allegation without merit or support among economists.
b. to pressure Canada to address issues that have nothing to do with trade negotiations or responding to unfair trade practices. Rather the tariffs are used to address domestic issues of concern to Trump's base of support.

This explains Trump's January 20 executive order (EO), and its "America First Trade Policy." Tariffs were intended to address not just trade policy, and erroneous allegations trade of deficits, but unfounded claims of illegal migration and the flow of fentanyl into the U.S. from Canada and Mexico.

TARIFFS TO PROMOTE INVESTMENT AND RE-SHORING AND RESTRUCTURE GLOBAL TRADE

Initially, the threats to impose tariffs were interpreted as a strategy to exert leverage over other countries on a range of trade and non-trade matters, like border issues, defense spending, and taxes and regulations on U.S.-based tech giants. But credible[4] and mounting evidence[5] emerged that Trump and his advisors do not see tariffs as merely a threat, but one tool that forms part of a larger strategy to fundamentally reshape the global trade and financial system[6], and to lure more manufacturing back to the USA. One of the key aspects of the right-wing populism promoted by Trump and his followers was that they correctly recognized that millions of manufacturing jobs disappeared with the de-industrialization caused by free trade. The tariff is meant to correct this problem, as a tactic of international intervention to attract investment and re-shore manufacturing.

The clearest evidence that tariffs are a tactic to reshape globe trade is provided by Stephen Miran, who Trump appointed to chair his Council of Economic Advisers. In a report he wrote in November 2024[7] for Hudson Bay Capital, where he was a senior strategist, Miran argued in favour of tariffs not as a threat or a negotiating tactic, but a way to rebuild the U.S. manufacturing sector. He said tariffs "are aimed at improving the competitiveness of American manufacturing and thus increasing our industrial plant and allocating aggregate demand and jobs from the rest of the world stateside." Acknowledging that tariffs are unlikely to result in significant reshoring of low-value-added industries like textiles, he claimed that they could, however, "preserve the American edge in high-value-added manufacturing, slow down and prevent further offshoring, and potentially increase negotiating leverage with which to procure agreements from other countries to open their markets to American exports or protect American intellectual property rights."

TARIFFS TO GENERATE REVENUE

Another reason for the imposition of tariffs which must not be overlooked is the goal of revenue-generation, which contradicts the purpose-based goal of gaining leverage. Trump needs the tariff revenue to fund the state as he cuts taxes faster than he can find savings from essentially destroying state capacity or giving it away to the private sector. The contradiction here is stark: once you make deals and lower tariffs, your revenues go down considerably. Therefore, we should question whether either objective is real. That said, it is a factor.

IMPACT ON CANADIAN WORKERS AND THE ECONOMY

Whether or not the tariffs are meant to be threats or a strategy to reshape global trade, their impact will be felt in the short term, and for many years to come. Many commentators have remarked that it is likely that the economic and political relationship between the U.S. and Canada has been irrevocably **harmed**.[8] The imposition of tariffs will have a devastating effect on Canadian industries, especially those heavily dependent on trade with the U.S., namely manufacturing, agriculture, softwood lumber, automotive, steel, and aluminum. Even if they are not imposed, the uncertainty will prompt capital flight:[9] there are already signs that many Canadian businesses are considering re-locating[10] to the U.S.

The Canadian Labour Congress estimates[11] that there are 2.4 million jobs that directly and indirectly depend on exports to the U.S. In 2024, approximately 1.8 million people representing 8.8% of the total employed worked in industries where 35% or more jobs depended on U.S. demand for Canadian exports. According to conservative estimates, a 25-per-cent tariff on Canadian imports to the U.S. would cut Canada's GDP by an estimated 2.6 per cent[12] (or roughly CAD $78 billion) — enough to drive this country into recession.

There will also be potential blowback on the U.S. economy because tariffs are inflationary, and due to trade disruptions because the North American economy is tangled and interdependent after many decades of free trade. Supply chains have become tightly integrated over decades, and a sizable chunk of the U.S.'s manufacturing imports from Canada and Mexico have components that were initially made in the U.S. and exported at earlier stages in the production process. In a notable example, some vehicle parts cross borders multiple times on their path to completion. Since trade flows between Canada and the U.S. (and Mexico and the U.S.) are so integrated, raising tariffs on U.S. industrial imports would also raise costs for U.S. exporters, and in turn, feed through to higher Canadian import costs. One RBC economist remarked that[13] tariffs in North America could undermine the continent as a manufacturing hub. Likewise, James Farley, the chief executive officer of Ford motor company, said that[14] tariffs would "have a devastating impact" on all the U.S. car companies and benefit international rivals.

HOW SHOULD CANADIANS RESPOND?

Whatever the reasons for Trump's unprecedented attack, Canada's sovereignty, economic security, and the interests of the industrial working class must be protected and supported. Canada needs an urgent national response to build a resilient, diversified and self-reliant economy, and a viable independent democracy. In NUPGE's opinion, in the short term, this means that we have no choice but to retaliate. In the long term, to avoid economic damage, Canadians must restructure the economy in a way that lessens dependence on the U.S. There's a lot of talk about what can be done, and the types of tools we should be prepared to use. Explained below are several measures Canada should take to counter Trump and protect Canadian workers.[15] This list is not exhaustive. There is much discussion[16] about various bold measures[17] that Canadians should take[18] to rebuild our sovereignty[19] and protect workers[20] in the face of U.S. aggression. The measures outlined below are examples that would have a positive, transformative effect on the Canadian economy, by promoting resilience, sovereignty and security.

1. Targeted and strategic tariff retaliation

In response to any U.S. tariffs imposed on Canadian exports, governments should, in our opinion, immediately issue retaliatory tariffs on U.S. imports.

2. Impose strategic export taxes

Canada must consider export taxes on oil, gas, and other resources to pressure the U.S., and generate public revenue. Canadian oil and electricity exports have an irreplaceable role in U.S. energy markets. An export tax would force U.S. consumers and businesses to shoulder the full cost of Trump's measures while generating Canadian public revenues for emergency social support. Even the threat of an export tax, which Canada has so far refused to entertain, would be a powerful warning shot. Export taxes[21] on oil and gas and other Canadian exports that cannot easily be replaced should target U.S. corporate profits, putting pressure on the Trump administration to negotiate their removal. These taxes could be strategically designed to maximize impact on the U.S. while minimizing any negative effects on Canadian workers and businesses—although there are no perfect or painless solutions, and American workers would also be affected. According to the Canadian Centre for Policy Alternatives,[22] a 25-per-cent export tax on oil and gas would net the federal government just over $40 billion a year based on current exports to the U.S. These funds should be used to build resilience for workers and their communities.

3. Industrial policy and the management of strategic national resources: impose export quotas and bans for strategic resources

Canada should implement export quotas on strategic resources and create strategic reserves. Canadians must demand that their governments exercise greater public discretion over the export of natural resources, elevating Canada's position in the value chain. The federal government, in consultation with provinces, must consider ways to regulate and manage the export of rare earth metals, critical minerals, lumber, oil and gas, aluminum, and potash. Bolstering domestic capacity to process, refine, and transform these inputs into higher-value goods will not only rebuild production capacity but also create good jobs, diversify exports, and reduce dependence on the U.S. The U.S. needs Canada for its supply of many critical resources, including oil, potash, uranium and various metals. Canada should limit the volume of resources exported and even consider outright bans. The federal government can step in as a buyer for any surplus, which has the added benefit of creating strategic reserves of key resources.

4. Procurement: enact "Buy Canadian" rules, and reciprocal policies for U.S. suppliers, leverage public purchasing for industrial development

Wherever possible, Canadians and their governments should prioritize purchasing Canadian-made goods and services. Packaging and advertising regulations can highlight local alternatives to U.S. products. Government procurement and consumer programs must favor Canadian options, and halt contracts with U.S. firms whenever possible, ensuring a stronger focus on domestic goods and services. Access to U.S. federal and state procurement is heavily restricted by "Buy America" and "Buy American" rules, which largely prevent Canadian suppliers from bidding on contracts. Over time, these regulations have become stricter, contributing to job losses in Canada. In contrast, Canada has a more open procurement market for U.S. suppliers. Recognizing this disparity, the Canadian federal government pledged in 2023 to introduce reciprocity measures but has yet to act. U.S.-based suppliers should face the same procurement rules in Canada that they do in the U.S. Canadian suppliers should be prioritized over U.S. suppliers, where possible. Public procurement at all government levels in Canada amounts to about $300 billion annually, as reported by the Canadian Collaborative Procurement Initiative. This represents a significant opportunity to reinvest in Canada's economy, supporting industrial strategies that promote innovation and build the skills and production capacities necessary for long-term growth.

Canceling defense contracts with U.S. arms companies is especially important—Canada has imported more than US$1 billion in U.S.-made weapons in the past decade.

ENHANCED INCOME, ECONOMIC, AND SOCIAL SUPPORT MEASURES FOR WORKERS

1. Rebuild public infrastructure: invest in essential public services to create jobs and support infrastructure.

Governments can jump-start the economy by investing in essential public services (healthcare, transit, education, social housing and climate adaptation initiatives), thereby creating new jobs and fixing crumbling public infrastructure.

2. Rebuild the Social Safety Net: emergency relief to mitigate layoffs & keep economy going

Canada must prepare for increased unemployment and provide financial support for workers[23] in trade-sensitive industries and communities, like the measures introduced during the COVID-19 pandemic. Supports should include:

- Easy access to Employment Insurance (EI) or other specialized income assistance programs, with more lenient eligibility criteria such as extending benefits duration and allowing supplementary income or education while receiving support.
- Strengthen workforce retraining: As suggested by the CLC,[24] the Canada Retraining and Opportunities Initiative should be rapidly expanded to support workers transitioning to new jobs. Likewise, EI should be used to increase support for workers to retain employment. With the 2018 EI Act, the government introduced flexibilities which expanded the eligibility for employed workers to access upskilling and retraining. With Ottawa's support, provinces and territories should expand opportunities for workers to remain attached to jobs and enroll in vocational training and education while receiving EI benefits.
- To mitigate the worst harms to workers and keep Canadians working, the federal government should allow export-dependent firms demonstrating financial distress to access preferential loan guarantees to maintain operations. Also, governments should implement programs like the Canada Emergency Wage Subsidy (CEWS) for eligible export-dependent firms in trade-dependent sectors and communities. This would temporarily subsidize salaries and help keep employees on payroll. Revenue generated through retaliatory tariffs could partially fund these and other support measures.
- Improve and enhance income supports and bridging programs for workers transitioning to retirement or for workers in trade-affected industries: to mitigate job losses and unemployment resulting from tariffs, governments should expand the Canadian Work-Sharing Program, provide income supplements for retraining, and bridge subsidies for early retirement.
- Make the Canada Emergency Response Benefit (CERB) permanent: during the COVID-19 pandemic, the federal government's emergency benefits minimized layoffs and social dislocations and precipitated a rapid economic recovery. Reviving and making the CERB program permanent could mitigate the human cost of the economic impact that will be concentrated in trade-exposed sectors and regions.

3. Enact price controls on essentials: stop *greedflation*

During the COVID-19 pandemic, many unscrupulous companies took advantage of inflation by artificially raising prices more than necessary. This practice of price gouging was popularly known as *greedflation*. Likewise, tariffs risk triggering a new wave of inflation and greedflation that will make life even more unaffordable at a tenuous moment for Canadian workers. Price controls need not be permanent, but, in the short term, they can blunt the effect of Trump's aggression and corporate greed on Canadian consumers. These measures could include an expansion of Canada's supply-managed agricultural sectors, such as dairy and eggs, to ensure domestic production for the Canadian market.

LONG-TERM ECONOMIC STRATEGIES

This is a critical moment to diversify our economy and find new long-term trading partners, while building high-quality, well-paid and protected jobs where the right to join a union is fully recognized.

1. Develop and implement an aggressive green industrial strategy[25]

Canada's reliance on continental energy security through transborder pipelines and refineries has reinforced economic integration with the U.S., but this approach has not led to greater resilience. Evidence now shows that this strategy has failed to build long-term stability, contributing to increased uncertainty, distrust, and anxiety. The economic consequences of this failure are evident today. To secure a more resilient future, Canada must reduce its dependence on oil and gas and on its economic ties with the U.S. It's crucial to shift away from energy and trade volatility toward true energy and economic security. Both federal and provincial governments must urgently adopt a publicly led green industrial strategy, focusing on building a national electricity grid, expanding clean manufacturing capabilities, and prioritizing community ownership. These projects must also meet Indigenous consent[26] (consultation and free, prior and informed consent) and stringent environmental protection standards.

In recent years, the federal government has taken a hesitant approach to industrial policy, relying mainly on subsidies and tax incentives. It has also introduced investment tools like the Canada Infrastructure Bank and the Canada Growth Fund to attract private investment in public goods. However, these measures have not brought about significant economic transformation. To achieve a sustainable future, the federal and provincial governments must aggressively support a state-led expansion of green industries that reduce reliance on U.S. trade and the unstable fossil fuel market. This strategy should also include a serious focus on repatriating portions of the oil industry, ensuring a more self-reliant and sustainable Canadian economy.

As G7 president, Canada has the responsibility to lead the world's richest countries in showing that they still strive for faster climate action and want to cooperate with all countries to make this a reality.

2. International multilateral cooperation: deepen & diversify economic ties with non-U.S. partners

To reduce dependence on the U.S., Canada must aggressively pursue a multilateral approach: strengthen relationships with the UK, European Union (EU), Japan, and trading blocs such as

BRICS. Mexico is a vital ally that Canada must not abandon because we have more influence over the U.S. when we work together. Canada should coordinate its retaliatory strategy with Mexico, as well as other allied countries like Colombia, and Brazil, and with member states of the EU. Such a multi-pronged counterattack from America's largest trading partners would be harder to weather for President Trump and will make our economy less structurally dependent on a single trading partner.

Canada must also be prepared to act boldly in its self-interest, and this includes re-evaluating our relationship with the People's Republic of China (PRC), which would force Trump to take notice. The bilateral relationship with PRC has deteriorated in part due to Canada lining up with the U.S. on tariff issues, which we should now revisit. For example, we must lift the imposition of tariffs that currently keep low-cost Chinese electric vehicles out of the Canadian market.

3. Strengthen domestic media and cultural industries, and bring the means of communications under public control

One of the most dangerous features of 21st century global capitalism is that social media algorithms are under the monopolistic control of a handful of right-wing and neo-fascist billionaire oligarchs. The result is a Canadian public sphere inundated with U.S. media influence, like Facebook, X, Netflix, Fox News, and the various podcasts and online media personalities undermining Canada and encouraging annexation. The Canadian state must protect the public good by bringing the means of communication under public control and regulation. Canada needs a reinvigorated public voice, which could be achieved through a combination of regulations, such as CanCon, and investments in the CBC, independent local media, and the arts.

OTHER MEASURES

1. Repatriate U.S.-owned assets: consider freezing or taking control of U.S. assets in Canada as a response to economic aggression.

2. Curtail U.S. patents and copyrights:

There is growing opinion[27] that Canada should restrict U.S. patents in Canada to hurt large U.S. companies and support Canadian industries. Despite being a leader in AI-based inventions and other key technologies, we have little control over the patents and intellectual property (IP) that our own publicly funded research has produced. Most patents are controlled by foreign companies that take our academic knowledge and sell it back for pennies on the dollar. On the other hand, the U.S. is the largest recipient of foreign income from its IP, earning US$127.39 billion in 2022. While the U.S. has advanced its intangibles economy through patents, it has constrained Canadian economic sovereignty through trade deals that require Canada to give U.S. companies greater patent rights. Canada can regain some of this lost sovereignty by working around U.S.-controlled patents. We have the legal right to challenge U.S.-controlled patents, particularly in crucial sectors such as pharmaceuticals and AI, under the World Trade Organization and section 19 of Canada's *Patent Act*. By exercising our powers under international and Canadian law, Canada could limit and circumvent U.S.-controlled patents, free Canadian companies to produce patented drugs, develop AI technologies, and sell them domestically and internationally. These could all provide a powerful countermeasure against U.S. economic aggression. We could request permission from our Commissioner of Patents to take these actions, creating significant pressure on the Trump administration.

Canada's control over intangible assets like patents is crucial for our future economic prosperity. While the U.S. benefits immensely from IP, Canada has been constrained by trade agreements that grant U.S. companies greater patent rights. We have struggled with foreign-controlled patents that siphon away Canadian wealth, especially in sectors like biotechnology and AI. By leveraging our legal powers to limit U.S.-controlled patents, Canada can regain sovereign control over IP, reduce reliance on foreign companies, and foster domestic innovation. This move would not only mitigate the economic impacts of U.S. tariffs but also create opportunities for Canadian businesses to thrive in a more open IP environment.

3. Target U.S. oligarchs and Trump enablers: impose financial penalties or bans on companies tied to Trump's inner circle.

4. Review and tax new foreign investments: lower the threshold for government review of foreign investments and impose surtaxes on American investments.

Canada must respond decisively to protect its economy and workers from Trump's aggressive policies. The proposed measures aim to build a resilient, diversified, and self-reliant economy. A modern National Policy is needed to develop a self-reliant national economy and resist U.S. expansionism.

THE END OF FREE TRADE: REDIRECT ECONOMIC DEVELOPMENT FROM TRADE TO DOMESTIC MANUFACTURING, INFRASTRUCTURE, RENEWABLE ENERGY, AFFORDABLE HOUSING

For many decades, NUPGE has been among the strongest critics of corporate globalization. We have always called for alternatives to free trade and investor rights agreements that grant extraordinary powers, rights, and immunity to private capital. NUPGE has long promoted the goal of a modern industrial strategy.

Perhaps the most remarkable impact of the Trump tariff threats is that it has prompted more[28] Canadians to rethink long-held beliefs about free trade.[29] The era of free trade and investment agreements began in 1989 with the Canada-U.S. Free Trade Agreement, followed by the 1994 North American Free Trade Agreement (NAFTA), and culminated in 2016 with CUSMA. The core logic behind these agreements was that economic integration with the U.S. would lead to prosperity and protect Canadian commercial interests. This belief has been exposed as a myth.[30] Critics of free trade from 40 years ago have been vindicated by its long-term consequences.[31] Canada is at a crossroads in its trade relationship with the U.S., particularly with the impending renegotiation of CUSMA. Today, many Canadians question whether the U.S. is a reliable partner and if any agreement with the U.S. is worth it.[32] There are growing concerns about the stability of this relationship, and Trump's actions have raised doubts about the efficacy of the agreement itself. Trump's willingness to act unilaterally and without any regard to honour trade commitments has undermined Canada's faith[33] in these deals and cast doubt on the trust[34] built between the two countries.

CUSMA was supposed to create a mutually beneficial trade framework for North America. Trump's actions have demonstrated that nothing will stop the U.S. from acting unilaterally. As a result, there is increasing skepticism about the value of trade and investment agreements, with economists and policymakers advocating for a rethinking of free trade itself.[35] Critics argue that free trade has harmed Canada's manufacturing base and diminished its ability to pursue independent economic policies. The Canada-U.S. Free Trade Agreement of 1988 is often cited as a key factor in the erosion of Canada's manufacturing sector, with companies relocating to the U.S., resulting in significant job losses in provinces like Ontario and Quebec. Many believe Canada could regain economic sovereignty by renationalizing industries that have been negatively impacted by these agreements.

The current crisis has revealed how these trade deals can be manipulated as tools of coercion. CUSMA includes provisions, such as Article 32.10, which grants the U.S. a veto over Canadian trade deals with non-market countries like China. Article 33.4 restricts Canada's ability to manage its exchange rates. These provisions compromise Canadian sovereignty, demonstrating how such agreements can limit Canada's autonomy. Furthermore, CUSMA's renegotiation clause allows the U.S. to continuously hold market access over Canada's head, using it as leverage to challenge policies deemed unfavorable. This vulnerability became apparent with Trump's tariffs, which have been imposed under dubious justifications, disregarding the terms of formal agreements. These shifting tariffs have eroded trust in the U.S. and exposed the fragility of international trade agreements when one party acts without consequence.

Canada's economic dependence on the U.S. market is also a significant challenge. With 80% of Canadian exports going to the U.S., detaching from this relationship is not feasible in the short term. However, the rising tensions and uncertainty under Trump's administration have highlighted the need for Canada to focus on strengthening its domestic economy and diversifying its trade relationships. The trade war and the instability introduced by the U.S. have underscored the importance of building resilience within Canada's economy.

While geographical proximity ensures that Canada and the U.S. will maintain economic interdependence, the era of relying on free trade agreements to safeguard Canadian interests is over. Agreements like CUSMA have not protected Canadian workers from U.S. coercion and have restricted the country's policy autonomy. The time has come for Canada to redirect its economic development focus away from trade dependency and toward bolstering domestic manufacturing, infrastructure, renewable energy, and affordable housing.

A MODERN WORKER-CENTRED PAN-CANADIAN INDUSTRIAL POLICY

Moving forward, Canada must focus on building a more resilient, independent economy that is not tied to the unpredictable nature of its trade agreements with the U.S. This requires a shift away from the assumption that free trade agreements can provide security toward strategies that prioritize economic sovereignty and diversification in the global marketplace, and an economy that serves the interests of all workers.

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