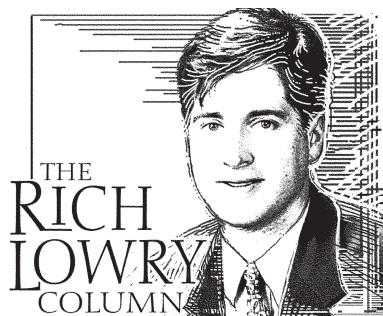


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THE RICH LOWRY COLUMN**

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By Rich Lowry



The revolt against tariffs

In 2016, Donald Trump's support for tariffs helped propel him to a shocking electoral victory. In 2026, his tariff policy may help tank Republicans in the midterms. This turnabout counts as a surprise of Trump's second term, and an unwelcome one for the president and his party.

During his political ascent in 2015-2016, Trump exploited issues where there was a disconnect between popular and elite opinion, and trade was prominent among them. His protectionism — expressed in pungent and excoriating terms — poached traditional Democratic ideological territory and appealed to the working-class voters that allowed him to crash the traditional Democratic "Blue Wall" states. In sheer political terms, what could go wrong? Well, nothing — until he got his way.

It turns out that Liberation Day was the beginning of the end for any appreciable political support for his tariff policy. The assumption has usually been that the politics of tariffs favor protectionism — the benefits are very visible and focused for specific sectors and businesses, so they will be highly committed to maintaining them, while the costs are widely dispersed among people who won't care so much.

The logic here has been turned on its head, though. The costs felt by all the people with no direct stake in protectionism are tanking support for the tariffs. On top of this, there's the fact that Trump won the second time promising to reduce prices, whereas import duties increase them. The Yale Budget Lab estimates the costs to households as about \$1,000 a year. The shambolic and arbitrary rollout of the tariffs, as well as the dubious legal basis for many of them, hasn't helped, either.

According to a poll that the libertarian Cato Institute conducted with Morning Consult, 74% of Americans say the

tariffs increased the prices they pay, including 66% of Republicans. Fifty-three percent of the public says that the tariffs have weakened the economy, and 49% say they have hurt their quality of life. Regarding the latest trade spat with Canada, a Politico/Public First poll found that 56% of Americans think the tariffs against Canada were "wrong." According to a CBS/YouGov survey, people prefer a candidate who opposes Trump's tariffs over one who supports them, by 26 points.

Democratic Senate candidates are promising to reverse Trump's tariffs, even the card-carrying protectionist Sherrod Brown is critical. And some Republican candidates in states with lots of trade with Canada have dissented from the trade war with Our Friendly Neighbor to the North.

The Midwest is a trouble spot for the GOP in the midterms, and it's not hard to understand why. China cut its purchases of U.S. farm products in retaliation for Trump's tariffs, and the farm sector has been slammed. Exports of wheat, cotton, beef and pork to China plummeted last year, and overall agricultural exports to China fell by 66%.

When you layer on top of this the price of diesel fuel jumping 80% and fertilizer increasing 15% because of the Iran war, it's a formula for a revolt. The tariffs have led to a tangle a little more than a month before the election. Trying to address complaints about high grocery prices, the administration wants to relent on beef tariffs to help consumers, but farmers — hurt by other tariffs — are balking at a measure that will reduce prices at a time when they are struggling.

One way or another, someone is going to be unhappy. Even if Trump's theory of the tariffs is correct — that higher import duties will lead to re-industrialization — the policy involves immediate disruption and increased costs in exchange for a protectionism-driven build-out that will take years to be fully achieved.

Long before then — indeed, by January — an opposition congressional majority hostile to the president and his tariffs may be entrenched in Washington. In politics, it's often "careful what you wish for," especially if it involves higher prices on an inflation-fatigued public.

Rich Lowry is editor of the National Review.

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