

The Wall Street Journal, 7 mai

Trump Tariffs Are a Victory Against Climate Change

By making consumption more expensive, they may do more for the planet than 1,000 ESG plans.



A technician at the Geological and Mining Research Office in Orleans, France, June 22, 2021. PHOTO: CHRISTOPHE ARCHAMBAULT/AGENCE FRANCE-PRESSE/GETTY IMAGES

Full text:

*I recently attended a closed-door session with senior supply-chain and sustainability executives. The mood was visibly tense. Conversations quickly turned to rising tariffs, deglobalization and mounting geopolitical risk. **But something surprising emerged from the anxiety: the possibility that President Trump's trade war might accelerate environmental progress.***

***That may sound counterintuitive.** The Trump administration is no champion of green policies. But if you care about emissions, overconsumption and waste, there's a case for optimism.*

I've spent more than a decade leading environmental initiatives and investments at the World Bank and [Apple](#), and I now serve as chief sustainability officer at the University of California, Berkeley's Haas School of Business. While many of my peers are anxious about the future of sustainability, I see a different story unfolding, for three reasons.

*First, the reordering of global trade is forcing companies to rethink supply chains. Many supply-chain leaders are outlining an emerging strategy called "manufacturing in region for region." This means producing goods in North America for North American consumers, in Europe for Europeans, and so on. That's good for stability and even better for the planet. According to the Environmental Protection Agency, **transportation accounts for roughly 15% of global greenhouse-gas emissions. Fewer transoceanic journeys mean less emissions.***

*Second, Mr. Trump's recent move to end the de minimis tax exemption for low-value imports from China could curb America's addiction to fast fashion and disposable goods supplied by retailers like Shein and Temu. **This would result in fewer impulse buys and less landfill waste.** Manufacturers may also respond by producing higher-quality, longer-lasting products. The effect won't be limited to cheap goods. Higher prices on electronics, appliances and vehicles will encourage consumers to extend the life of what they already own. **The greenest car isn't a new electric vehicle; it's the one you don't replace.***

Third, the U.S. remains deeply dependent on China for critical minerals such as rare-earth elements. Rare earths are vital inputs for everything from smartphones and EVs to wind turbines and military systems. China accounts for more than two-thirds of global rare-earth production. The U.S. can mitigate this vulnerability by investing in domestic rare-earth recycling infrastructure.

***The technology to recover rare earths from discarded electronics already exists. Apple recently announced that it is more than 99% of the way toward its 2025 targets of using 100% recycled rare-earth elements in magnets and 100% recycled cobalt in Apple-designed batteries.** Few companies have followed suit—not*

because the technology isn't available but because of economics. When rare earths are cheap, there's little incentive to recycle. If policymakers are serious about reducing dependence on China, they should start by reviewing America's junk drawers.

***None of this should be mistaken for a coordinated climate strategy.** Under President Biden, climate was a top-tier priority. Under Mr. Trump, it isn't. But there's a difference between removing sustainability as a priority and actively opposing it. Energy Secretary Chris Wright has a consistent message on this subject. **The Trump administration isn't against clean energy or EVs. It is for energy dominance and economic competition.** As long as sustainability efforts don't conflict with Mr. Trump's key priorities, there's room for progress.*

***Environmentalists shouldn't waste time hoping for a different political landscape. This is a moment for pragmatism. Mr. Trump's trade policies might do more for the planet than a thousand environmental, social and governance reports.** It's rare for environmental objectives to align with the Trump administration's strategic interests. We shouldn't waste the opportunity to capitalize on it.*

Ms. Chan is chief sustainability officer at the University of California, Berkeley's Haas School of Business.