If we can't move it, we can't sell it: reducing Canada's reliance on the U.S. demands a national trade infrastructure strategy

While peer nations have long-term strategies to build and maintain the infrastructure that supports trade, Canada stands alone among its global competitors in lacking a coherent plan. That needs to change. Now.

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With global instability mounting and growing threats from south of the border, the stakes for Canada's economy and our ability to compete have never been higher. *Image courtesy of Pexels/Avijit Singh*

Canada is an exporting nation. The flow of goods fuels two-thirds of our GDP, supports millions of Canadian jobs, and is intimately tied to our standard of living. Despite this, the trade infrastructure and corridors on which we rely to get our goods to market are falling dangerously behind those of our competitors.

Today, roughly 75 per cent of Canada's exports go to the United States, but that partner is becoming increasingly unpredictable. From tariffs and "Buy America" policies to the abrupt cancellation and restart of trade negotiations, along with regulatory shifts and political polarization, our southern neighbour is sending a clear message: Canada can no longer take market access for granted. We are skating on thin ice, and our economic future is in danger.

Even before the latest salvos, Canada recorded a $7.1-billion trade deficit in April, largely due to slumping exports to the U.S.—a warning sign. As Prime Minister Mark Carney has repeatedly emphasized, the old relationship with America is over. Diversifying trade isn't just a policy goal anymore; it's a national imperative.

While peer nations have long-term strategies to build and maintain the infrastructure that supports trade, Canada stands alone among its global competitors in lacking a coherent plan. We've too often prioritized shovel-ready projects—short-term, disconnected investments that don't serve national economic goals—over shovel-worthy ones.

That needs to change. Now.

We need a Canada Trade Infrastructure Plan (CTIP): a long-term, strategic blueprint developed jointly by governments and industry. CTIP would prioritize the critical corridors and gateways that move Canadian goods to markets at home and abroad. It would replace patchwork efforts with sustained, coordinated investment tied to national priorities.

The good news is that the federal government is already signaling its willingness to think bigger, but rhetoric must become reality. Carney has committed to "build big, build fast, and build smart," a call for nation-building infrastructure on a scale not seen in generations. He has stressed that "Canada is a country that used to build big things," citing the St. Lawrence Seaway as a model for bold and swift action. The recent introduction of legislation to speed up project approvals and dismantle internal trade barriers aligns with this vision.

Momentum is growing. Our provinces unanimously endorsed the principles of CTIP in July 2023, recognizing that trade infrastructure is foundational to the prosperity of every province and territory. National organizations—including our own—are calling for urgent action. So are Canadians: A 2023 Ipsos survey found that 95 per cent believe trade infrastructure is vital to our economy, and only nine per cent think it's in good shape.

The federal government's $5-billion Trade Diversification Corridor Fund is an important start. But as a 2021 analysis showed, even $21-billion in annual transportation investment leaves Canada trailing our global peers. A truly transformative effort—one equal to the moment and the market—is needed.

A national trade infrastructure plan would deliver a reliable, modern transportation network to move Canadian goods to global and domestic markets. It would enable meaningful trade diversification by reducing our overreliance on any single partner, and restore this country's reputation as a reliable and efficient trading partner. Prioritizing the smarter, more efficient movement of goods would also help lower greenhouse gas emissions across the trade transportation system, helping us to compete sustainably on the global stage.

While fiscal constraints are real, co-ordinated investments through trade infrastructure offer a high return on public dollars by reducing bottlenecks, increasing GDP and unlocking private sector contributions. More plainly, it makes all the users of that infrastructure more productive.

Canada has a long and proud history of building infrastructure that unites and strengthens our economy. Today's challenge demands that same bold spirit and foresight. Because if we can't move it, we can't sell it. And if we can't sell it, Canadians lose jobs, growth, and ground.

Let's stop patching potholes and start planning for prosperity. It's time to turn the prime minister's words into action and build the Canada Trade Infrastructure Plan that our economy, and our future, demand.

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