

Industrial Trade Report

By GCP Industrial Products

Report Highlights

- The U.S. and China finalized a trade understanding on June 24th building on the agreement which was originally reached last month in Geneva.
- As the July 9 deadline nears, the administration is preparing to finalize upward of 10 trade deals in the coming two weeks.
- For countries that do not reach agreements with the U.S. by July 9th, President Trump has said that he will send “letters” to countries dictating trade terms and tariff rates.
- Raw material prices continued their upward trend in May, the index has climbed 19.1% over the past six months, a strong signal that inflationary pressures on intermediate materials remain persistent.
- Global manufacturing production fell at the sharpest pace in eight months. Disruptions from U.S. policy acted as the key dampener on manufacturing performance.
- U.S. ports in May processed 1.91 million Twenty-Foot Equivalent Units (TEUs) down 13.4% from April and down 8.1% year-over-year (YOY).
- U.S. imports from China fell to 637,001 TEUs which is a 20.8% drop from April and 28.5% YOY.
- Large U.S. importers (retailers and manufacturers) are pulling forward third-quarter orders from China to lock in shipping costs and reduce exposure to future policy shifts. This front-loading of summer demand is expected to sustain elevated shipping activity through mid-summer, potentially straining available vessel space in the coming weeks.
- National average trucking spot rates have held largely flat for 2025 but have increased slightly for three straight months.

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Tariffs

2025 Trump Tariff Threats and Actions				
Imposed On	Effective Date	Type of Tariff	Amount	Status
EU	July 1	European Union faces a 50% Tariff on Imports to U.S.	50%	Pending
Various	June 23	New Steel Derivatives - Section 232	50%	Active
Various	June 4	Steel, Aluminum and Derivatives	50%	Active (up from 25% March 12)
China	May 14	U.S. Enforces 10% Reciprocal Tariff	10%	Active
Various	May 3	Automobile Parts	25%	Active
China	May 2	U.S. De Minimis Exemption Ends for China Low-Value Imports – Tariff Increases (Postal Items)	Varying	Active
Various	April 10	Reciprocal Tariff Paused, 10% Remains (exempt Canada and Mexico)	Varying	Active 10%
China	April 10	U.S. Enforces on China 125% Tariff	125%	Reduced to 10% (May 14)
China	April 9	U.S. Enforces on China 84% Tariff	84%	
Various	April 5	Reciprocal Tariff (exempt Canada and Mexico)	Varying	Paused (April 10)
Various	April 3	Automobiles	25%	Active
Various	Unannounced	Countries Importing Oil from Venezuela	25%	Pending
Canada	TBD	Reciprocal to address all Canadian tariffs, taxes and non-tariff barriers	TBD	Pending
Various	March 12	Steel, Aluminum, and Derivatives	25%	Active
Canada	March 7	Potash Products not covered by CUSMA/USMCA	10%	Active
Canada	March 4	Energy Products not covered by CUSMA/USMCA	10%	Active
Canada/Mexico	March 4	25% Tariff on Canada and Mexico for items not covered by CUSMA/USMCA	25%	Active
China	March 4	U.S. Enforces on China additional 10% Tariff	10%	Active
China	February 4	U.S. Enforces on China 10% Tariff	10%	

U.S./China Trade Negotiations

- The U.S. and China finalized a trade understanding reached last month in Geneva.
- The China deal, which U.S. Commerce Secretary Howard Lutnick said was signed June 24, codifies the terms laid out in trade talks between Beijing and Washington, including a commitment from China to deliver rare earths used in everything from wind turbines to jet planes.
- The agreement with China is regarded as a milestone after both sides have accused each other of violating the terms of previous handshake accords. Yet it still hinges on future actions by both nations.
- Lutnick said that under the agreement, U.S. “countermeasures” imposed ahead of the London talks would be lifted, but only once rare earth materials start flowing from China.
- Few details have been released, but China said earlier this month it would tighten controls over two chemicals that can be used to make fentanyl, in an apparent olive branch to the U.S. The Trump administration put 20% tariffs on Chinese exports earlier this year over Beijing’s alleged role in America’s opioid crisis.

Global Trade Negotiations

- As the July 9 deadline nears, the administration is preparing to finalize upward of 10 trade deals in the coming two weeks.
- Lutnick stated “We’re going to do top 10 deals, put them in the right category, and then these other countries will fit behind.” Lutnick didn’t specify which nations would be part of that first wave of trade pacts, though Trump suggested the U.S. was nearing an agreement with India.
- The president has also said that he will ultimately send “letters” to countries dictating trade terms if agreements aren’t reached in time. Countries will be sorted into “proper buckets” on July 9. Trump could also extend deadlines to allow for more time for talks.
- Lutnick further commented “those who have deals will have deals, and everybody else that is negotiating with us, they’ll get a response from us and then they’ll go into that package. If people want to come back and negotiate further, they’re entitled to, but that tariff rate will be set and off we’ll go.”
- Trade agreements typically take years to negotiate, as evidence the earlier pact arrived at with the UK still leaves major unanswered questions.

Raw Material Pricing

Institute for Supply Management (IMS®) Price Index					
Month	Prices Higher	Prices Same	Prices Lower	Net	Index
May 2025	45.1%	48.5%	6.4%	+38.7	69.4
Apr 2025	49.2%	41.1%	9.7%	+39.5	69.8
Mar 2025	46.0%	46.7%	7.3%	+38.7	69.4
Feb 2025	31.4%	61.9%	6.7%	+24.7	62.4
Jan 2025	20.7%	68.3%	11.0%	+9.7	54.9
Dec 2024	14.4%	76.1%	9.5%	+4.9	52.5
Nov 2024	12.2%	76.1%	11.7%	+0.5	50.3
Oct 2024	19.8%	69.9%	10.3%	+9.5	54.8
Sept 2024	12.9 %	70.7 %	16.4 %	-3.5	48.3
Aug 2024	21.4%	65.2%	13.4%	+8.0	54.0
Jul 2024	22.6%	60.5%	16.9%	+5.7	52.9
Jun 2024	20.2%	63.8%	16.0%	+4.2	52.1
2024 Index Average Jan.-Dec.					53.6
2023 Index Average Jan.-Dec.					46.6
2022 Index Average Jan.-Dec.					64.7
2021 Index Average May-Dec.					82.8
Price index under 50 means prices are decreasing					
Price index above 50 means prices are increasing					

Key Takeaways:

- Raw material prices continued their upward trend in May, with the ISM® Prices Index registering 69.4%. While this is a slight dip from April's 69.8%, it still marks the eighth consecutive month of increases and reflects one of the highest readings since June 2022.
- Over the past six months, the index has climbed 19.1%, a strong signal that inflationary pressures on intermediate materials remain persistent.
- Steel, aluminum and a general 10% tariff on many imported goods were key drivers of the price increases last month, with the effects being felt across the entire manufacturing value chain.
- In May, the 16 industries that reported paying increased prices for raw materials, in order, are: Apparel, Leather & Allied Products; Nonmetallic Mineral Products; Electrical Equipment, Appliances & Components; Primary Metals; Petroleum & Coal Products; Textile Mills; Wood Products; Machinery; Food, Beverage & Tobacco Products; Transportation Equipment; Miscellaneous Manufacturing; Computer & Electronic Products; Chemical Products; Paper Products; Fabricated Metal Products; and Furniture & Related Products.
- No industries reported paying decreased prices for raw materials.

Commodity Pricing

IMS® Commodity Price Change		IMS® Commodities in Short Supply
Prices Up	Prices Down	Electronic Components (3) Rare Earth Components
Aluminum (18) Aluminum Products* (3) Corrugated Boxes (3) Critical Minerals (3) Electrical Components (4) Electronic Components (4) Paper Products; Steel (4) Steel - Stainless (3) Steel Products (3)	Aluminum Products* Cooking Oils Diesel Fuel (2) Natural Gas (3) Polypropylene.	<i>The number in brackets after each item indicates the number of consecutive months the commodity has been listed up or down. * Indicates those commodities both up and down in price.</i>

U.S. Natural Rubber Pricing (cents/kg)



Key Takeaways:

- Natural rubber prices have fallen to around 159 U.S. cents per kilogram, mainly due to decreasing oil prices after a ceasefire between Iran and Israel was announced. Meanwhile, worries are mounting over supply shortages due to flooding and heavy rainfall across key producing regions including southern China, Vietnam, and Thailand. Demand concerns also exist as sluggish tire sales and uncertainty in China (the world's largest rubber consumer) continues to cloud the market outlook amid ongoing U.S. trade tensions.

Global PMI Manufacturing Heatmap

Included components for calculating the manufacturing conditions of each country are; Production output, new orders, new export orders, backlogs of work, employment, input prices, output prices, future expectations, quantity of purchases, suppliers' delivery times, stocks of purchases, stocks of finished goods.

		Jun 24	Jul 24	Aug 24	Sept 24	Oct 24	Nov 24	Dec 24	Jan 25	Feb 25	Mar 25	Apr 25	May 25
Global	Global												
Americas	Brazil												
	Canada												
	Mexico												
	United States												
Europe	Eurozone												
	France												
	Germany												
	Italy												
	Netherlands												
	Poland												
	Spain												
	UK												
Asia Pacific	China												
	India												
	Indonesia												
	Japan												
	Philippines												
	South Korea												
	Taiwan												
	Thailand												
	Vietnam												
	ASEAN												
Improving at a faster rate													
Improving at a slower rate													
Deteriorating at a slower rate													
Deteriorating at a faster rate													
At a neutral 50.0 mark													

Key Takeaways:

- Global manufacturing production fell at the sharpest pace in eight months. Disruptions from U.S. policy acted as the key dampener on manufacturing performance, with emerging markets notably affected to a greater degree.
- Business sentiment showed tentative improvement, largely due to a pause in higher U.S. tariffs. However, the unwinding of recent front-loaded inventory building poses a risk of renewed weakness in the manufacturing sector.

Global Sectors Heatmap

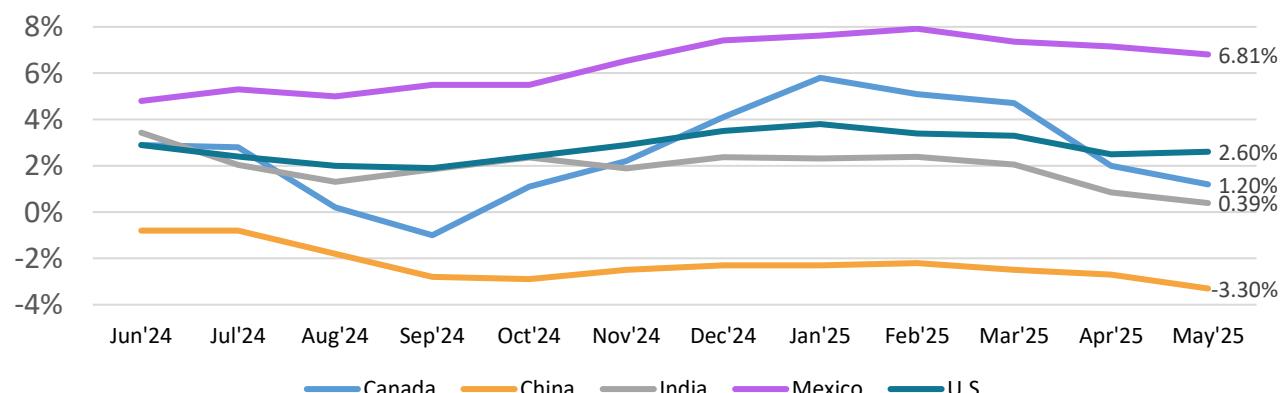
	Jun 24	Jul 24	Aug 24	Sept 24	Oct 24	Nov 24	Dec 24	Jan 25	Feb 25	Mar 25	Apr 25	May 25
Basic Materials	Green	Grey	Orange	Light Orange	Light Orange	Orange	Orange	Light Orange	Green	Orange	Orange	Orange
Chemicals	Green	Light Green	Orange	Light Orange	Light Orange	Orange	Orange	Light Orange	Green	Orange	Orange	Orange
Resources	Green	Orange	Orange	Light Orange	Light Orange	Orange	Orange	Light Orange	Orange	Orange	Orange	Orange
Forestry & Paper Products	Green	Orange	Light Orange	Light Orange	Green	Light Green	Orange	Green	Orange	Orange	Green	Orange
Metals & Mining	Green	Orange	Light Orange	Light Orange	Light Orange	Orange	Orange	Light Orange	Light Orange	Orange	Orange	Orange
Industrials	Light Green	Light Green	Light Green	Light Green	Green	Light Green	Green	Light Green	Grey	Green	Light Green	Green
Industrial Goods	Light Green	Orange	Orange	Green	Green	Orange	Orange	Light Orange	Green	Light Green	Green	Light Green
Machinery & Equipment	Light Green	Orange	Orange	Green	Light Green	Green	Orange	Light Orange	Green	Light Green	Green	Light Green
Construction Materials	Light Green	Green	Orange	Orange	Green	Light Orange	Orange	Light Orange	Green	Orange	Green	Orange
General Industrials	Grey	Green	Light Green	Orange	Green	Light Orange	Orange	Light Orange	Green	Light Green	Orange	Light Orange
Transportation	Light Green	Light Green	Green	Light Green	Green	Green	Green	Light Green	Orange	Green	Grey	Green
Improving at a faster rate	Green											
Improving at a slower rate	Light Green											
Deteriorating at a slower rate												
Deteriorating at a faster rate												
At a neutral 50.0 mark												

Key Takeaways:

- Basic Materials saw a notable upswing in pricing in May, while production metrics remained weak, which lead to a sector wide deterioration in growth.
- Despite an output contraction, the industrial sectors forward-looking sentiment improved noticeably, suggesting that part of the weakness could be cyclical or tariff-related rather than structural.

Producer Prices by Country

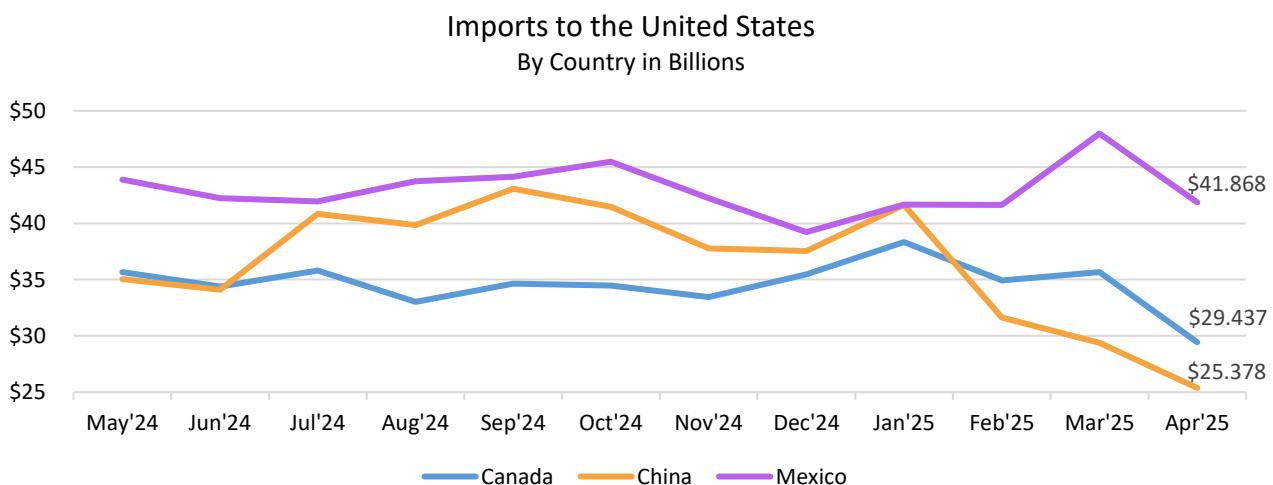
Producer Prices by Country
Percent Change Per Month Year Over Year



Key Takeaways:

- U.S. producer prices rose 0.1% in May, with both goods and services showing prices slightly higher last month. In the past year, prices for goods are up 1.3%.
- China's producer prices fell 3.3% YOY marking the 32nd consecutive month of producer deflation and the steepest decline since July 2023. The cost of production materials fell at a faster pace with sharper declines in mining and raw materials, while processing prices also fell further.
- India's wholesale price inflation eased to 0.39% in May. This marked the lowest reading since March 2024. Manufacturing inflation also slowed to 2.04% from 2.62%, its lowest level since November 2024, reflecting softer increases in costs for most subcomponents, including rubber and plastic products.

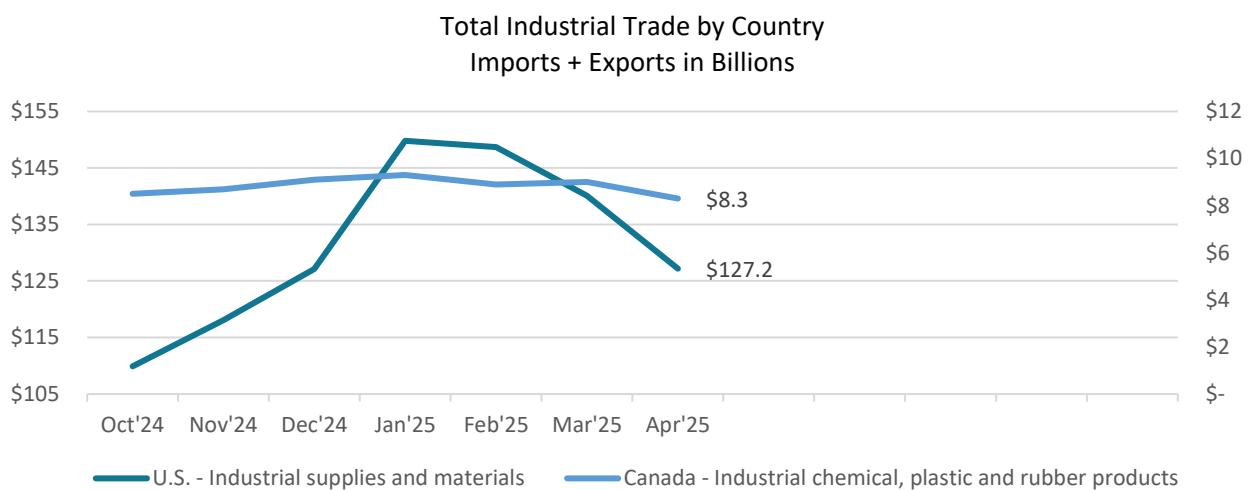
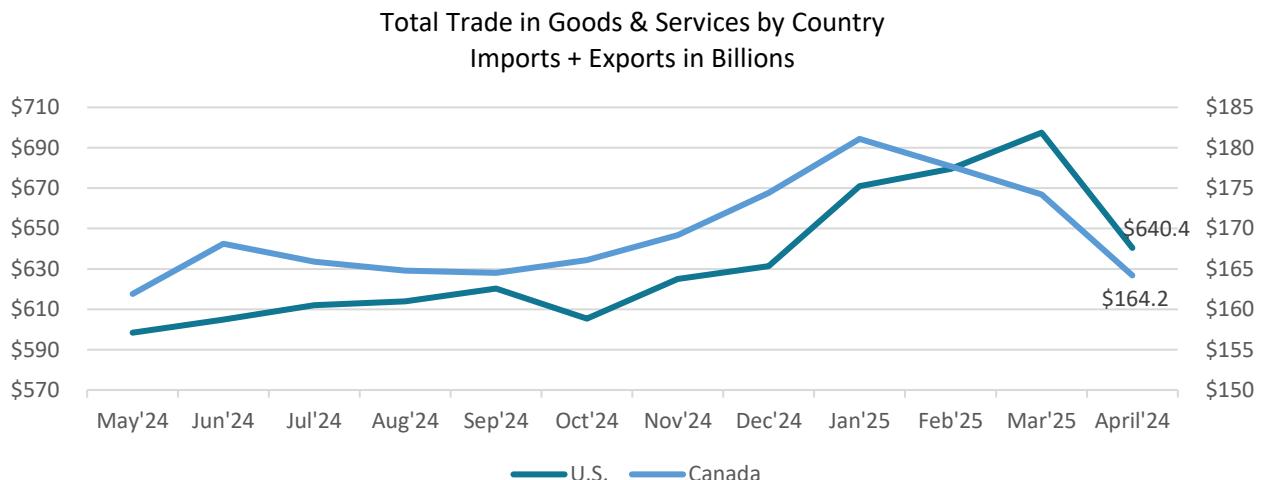
Imports to the United States



Key Takeaways:

- Canadian exports to the U.S. experienced a 17% decline that aligns with a wider pattern of reduced U.S. demand for foreign goods. This decrease came during a month in which the U.S. recorded its largest-ever single-month fall in total goods imported.
- In April, U.S. imports from China totaled \$25.4 billion, a decrease of 19.8% compared to the same period last year. However, this still represented a significant portion of overall U.S. imports, with China remaining the top source of containerized imports.
- Overall imports from Mexico declined by 13% month-over-month (MOM), with light vehicle exports particularly affected, dropping 10.9% marking the sharpest April decrease since 2016.

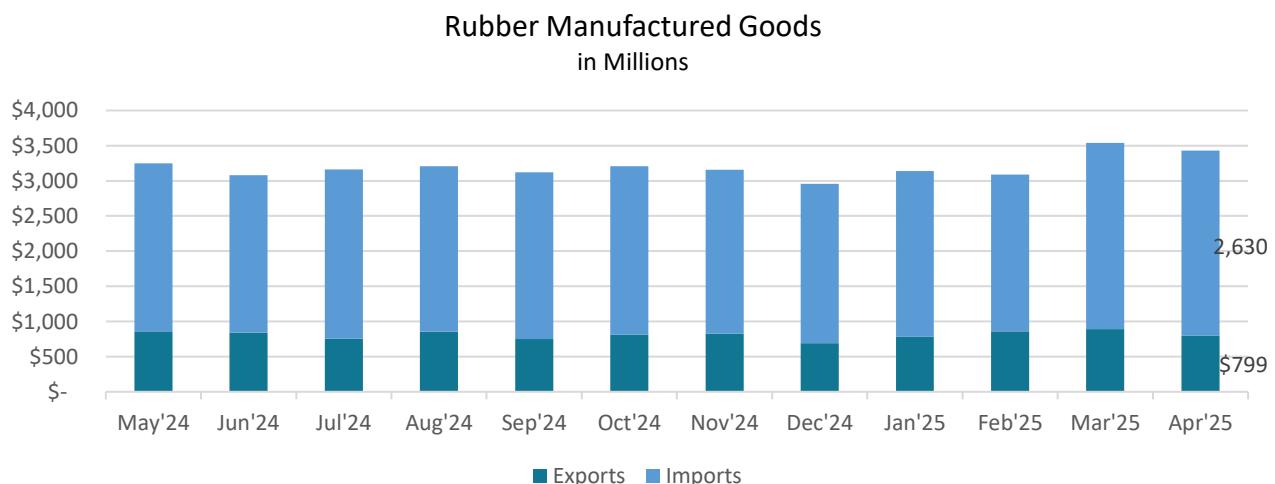
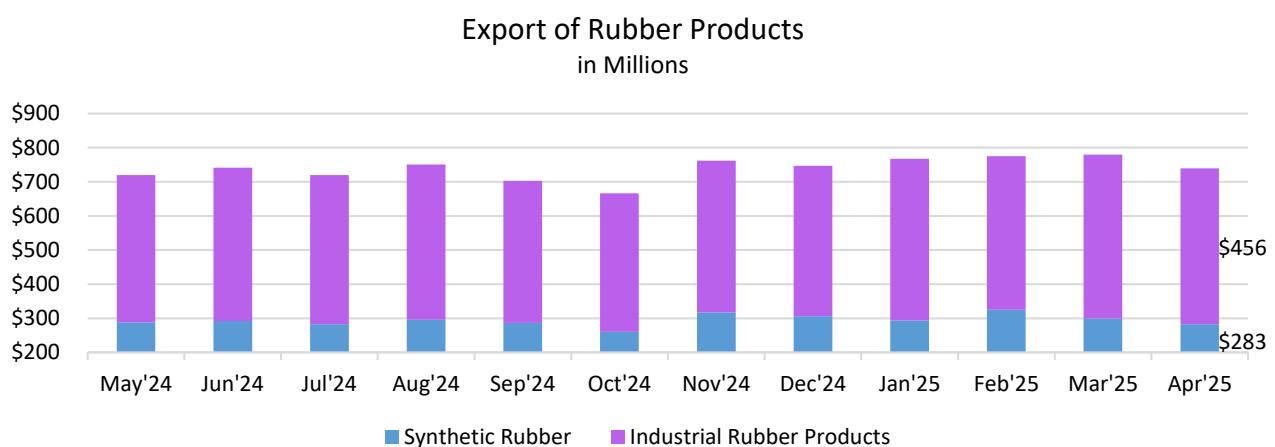
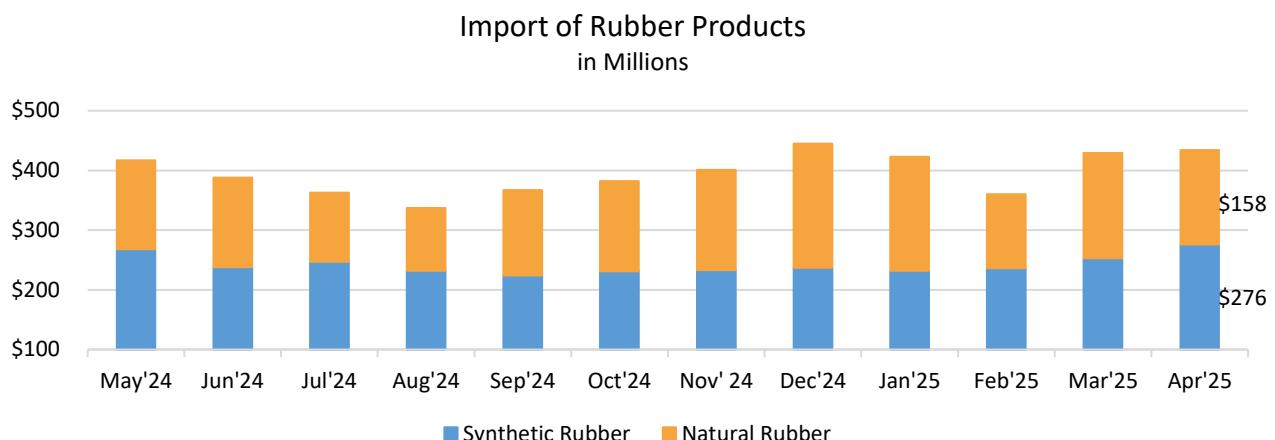
Total Trade Volume



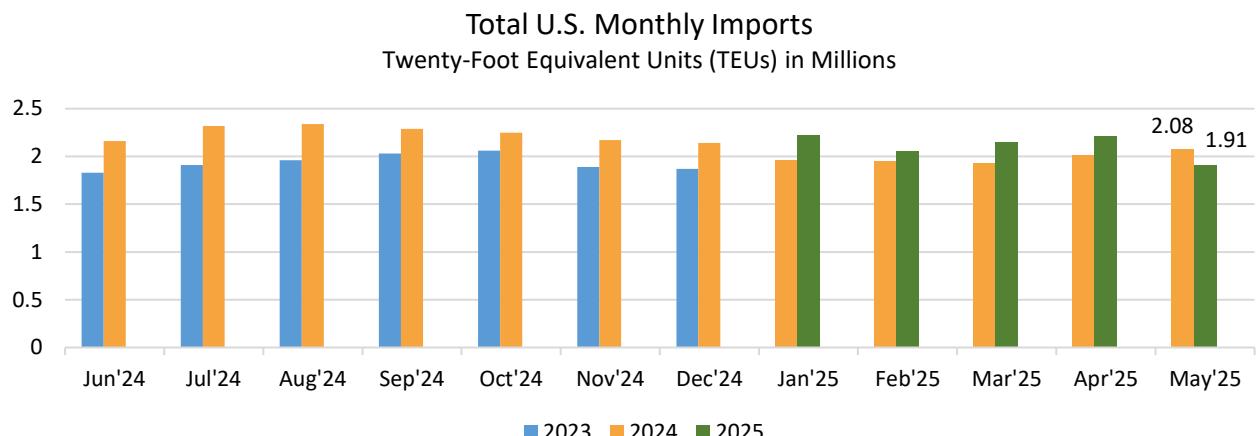
Key Takeaways:

- Combining both imports and exports provide insights into the overall health and dynamics of that country or sector. If the totals are growing, it indicates a healthy, expanding economy or marketplace benefiting from both strong domestic and international markets.
- For the U.S., the export of industrial supplies and materials grew nearly 16% MOM, while imports shrank for the second consecutive month by nearly -31%.
- In Canada, exports of the industrial chemical, plastic and rubber products sector, continued their MOM decline, decreasing -12.7% while imports also declined -2.6% for the month.

U.S. Rubber Import & Export Stats



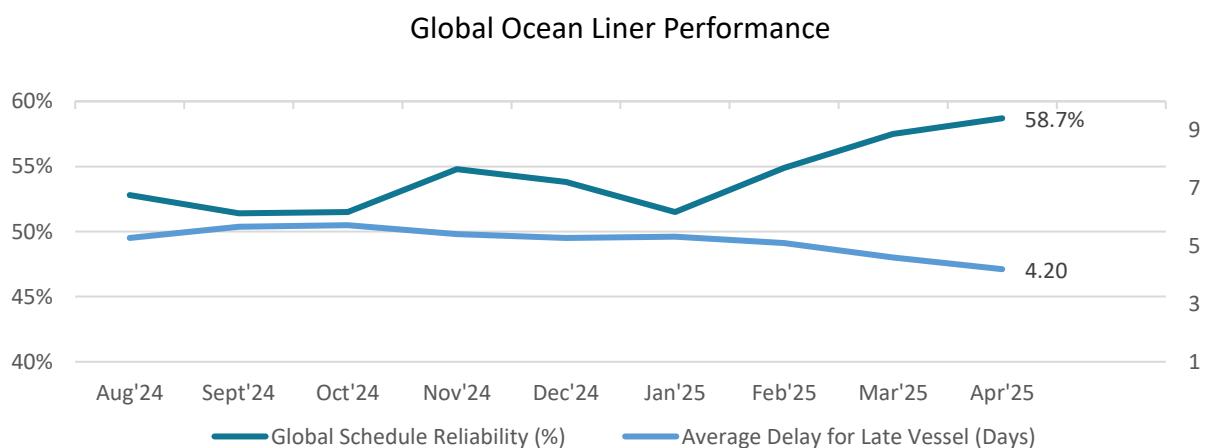
Monthly U.S. Imports



Key Takeaways:

- U.S. ports in May processed 1.91 million Twenty-Foot Equivalent Units (TEUs) down 13.4% from April and down 8.1% year-over-year (YOY). This is the first YOY decline since September 2023 and the lowest volume since 1.87 million TEUs in December 2023.
- The current forecast would bring the first half of 2025 to 12.54 million TEUs, up 3.7% YOY. That's better than the 12.13 million TEUs forecast last month before the tariff pause was announced.

Global Ocean Schedule Reliability



Key Takeaways:

- Global ocean schedule reliability (measuring 60+ carriers) improved by 1.7% MOM to 58.7%, the highest level recorded since November 2023. In addition, the average arrival delay of late vessels improved to 0.4 days, which continues its downward trend from the previous month.

Port Operations

Current North America Vessel Dwell Times				
Region	Port	Vessels Waiting	Average Wait for Birth	Rail Dwell Times
U.S. West Coast	LA/LB	0	0 days	5 days
	OAK	1	0 days	5 days
	SEA/TAC	1	0 days	5 days
Canada West Coast	Van	3	1 days	5 days
	PRR	2	0 days	3 days
U.S. East Coast / Gulf Coast	NY/NJ	1	0 days	5 days
	BAL	8	0 days	2 days
	NOR	6	1 days	3 days
	CHS	0	1 days	3 days
	SAV	1	2 days	2 days
	HOU	1	4 days	8 days

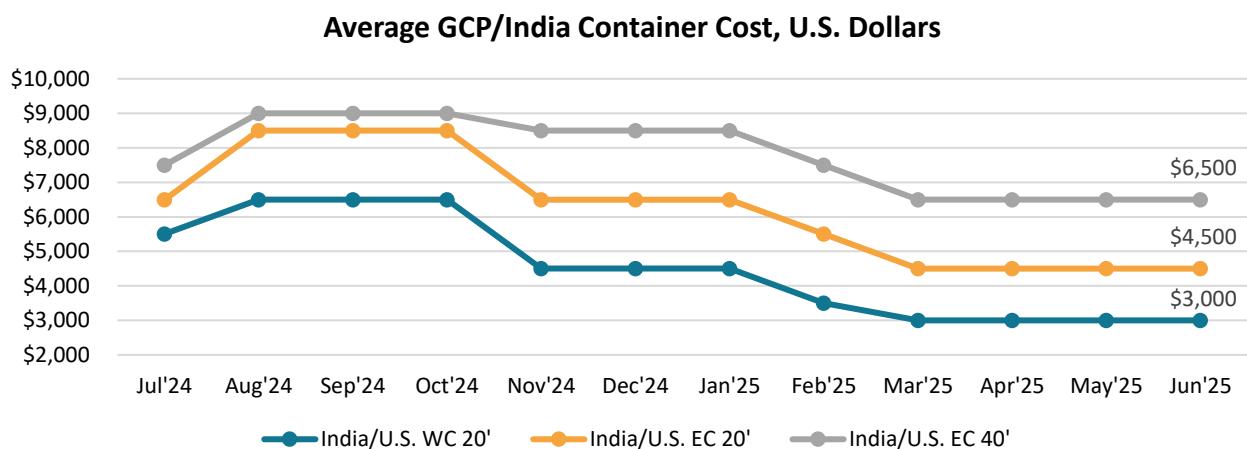
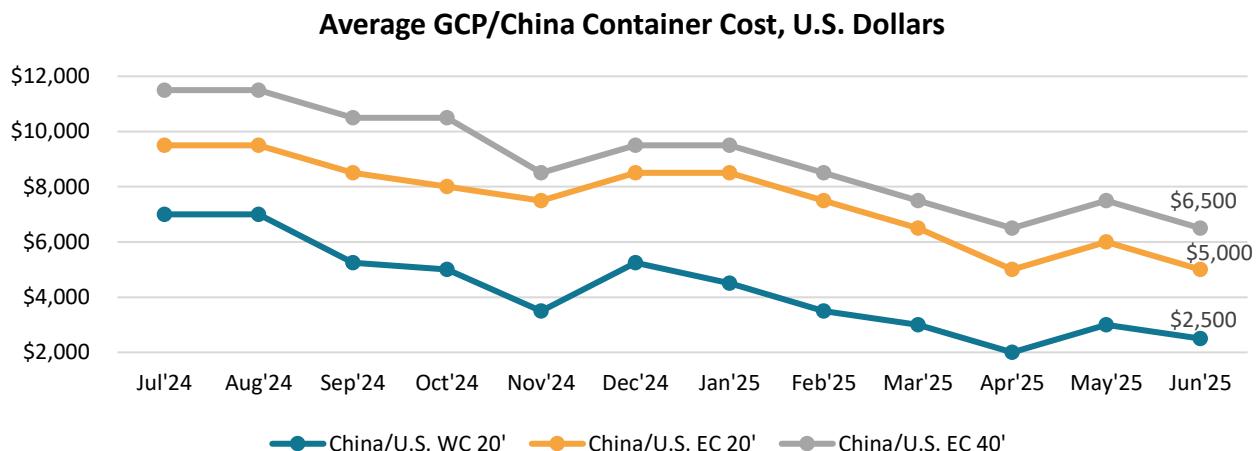
Improving over last month	Green	Consistent over last month	Yellow	Deteriorating over last month	Red
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Key Takeaways:

- In May, U.S. container imports declined sharply after several months of growth. The drop followed a wave of frontloading in April and reflects a broader adjustment to shifting trade policies, including the expiration of the de minimis exemption and ongoing tariff volatility.
- Port dynamics also shifted in May, with East and Gulf Coast ports gaining share as volumes at West Coast ports declined. Port delays remained steady across most major gateways, though Los Angeles and Long Beach experienced increases despite lower volumes.
- U.S. imports from China fell to 637,001 TEUs which is a 20.8% drop from April and 28.5% YOY. This was the steepest monthly decline since March 2020 and marks a clear pullback following April's surge, as importers adjusted to increased costs and regulatory uncertainty.
- Despite the decline, China remains the top U.S. maritime trade partner by a significant margin; however, continued policy volatility and diversification efforts are likely to keep pressure on China-origin volumes in the coming months.
- Container volume at the top 10 U.S. ports declined 10.7%, with a combined loss of 217,112 TEUs compared to April's volumes.

Ocean Freight

All rates stated on this page are GCP's port to door rates, fully delivered, inclusive of all fees.

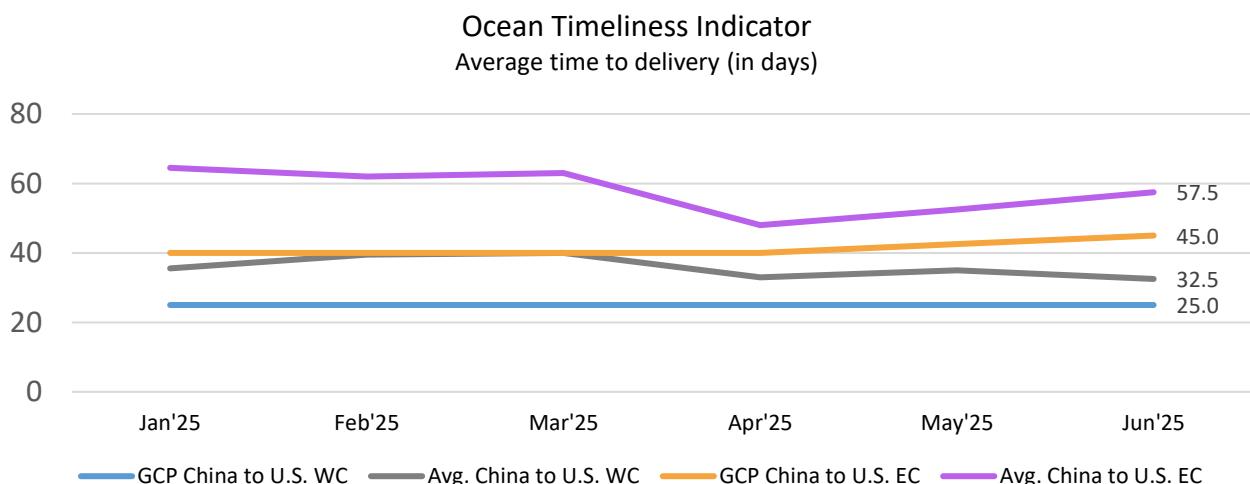


Key Takeaways:

- The temporary lowering of U.S. reciprocal tariffs on imports from around the world, and especially the temporary lowering of tariffs on Chinese-made goods, kicked off a steady increase in bookings, reflecting in rising market demand.
- In response, carriers are restoring vessel capacity on Pacific routes, reversing earlier cuts of 20-30% to the U.S. West Coast (USWC) and 30-40% to the U.S. East Coast (USEC).
- Large U.S. importers (retailers and manufacturers) are pulling forward third-quarter orders from China to lock in shipping costs and reduce exposure to future policy shifts.

- This front-loading of summer demand is expected to sustain elevated shipping activity through mid-summer, potentially straining available vessel space in the coming weeks.
- Blank sailings have also decreased in recent weeks with the cancellation rate falling from 34% in early May to a projected 5% by the end of June which would be the fewest blank sailings since late March.
- As of June, Red Sea disruptions persist amid continued Houthi attacks and failed ceasefire efforts. Major carriers are still rerouting vessels around the Cape of Good Hope, significantly extending transit times, tightening availability and driving up costs across major trade lanes.
- It seems the U.S. administration still intends to impose port fees on Chinese-built vessels starting October 14, 2025, with rates increasing gradually over a three-year period.
- In response, some ocean carriers are expected to shift Chinese-built ships to other trade lanes to avoid the fee. Others, particularly Chinese operators, may attempt to pass the additional costs on to customers. As carriers realign their fleets, shippers should anticipate rate volatility and potential service adjustments.

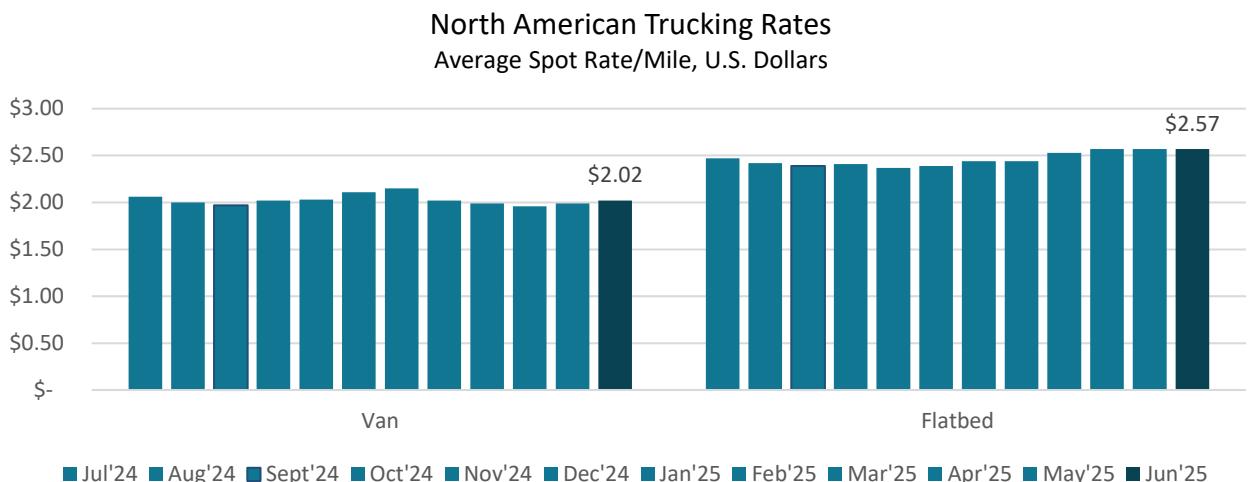
Ocean Timeliness Indicator



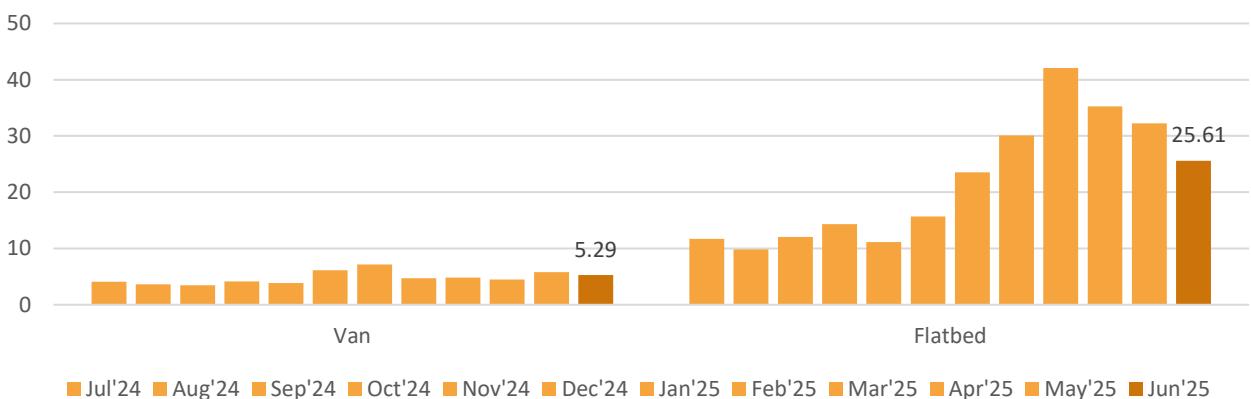
Key Takeaways:

- For the average calculations we use the Flexport's Ocean Timeliness Indicator (OTI), which tracks transit time from the cargo ready date at the exporter's factory or facility to departure from the destination port (EC - NY/NJ or WC - L.A./Long Beach).
- GCP's delivery time uses our port-to-door transit time, tracking the days an average order takes to ship and be delivered to your location, including ocean and all other intermodal transit.

Trucking Freight



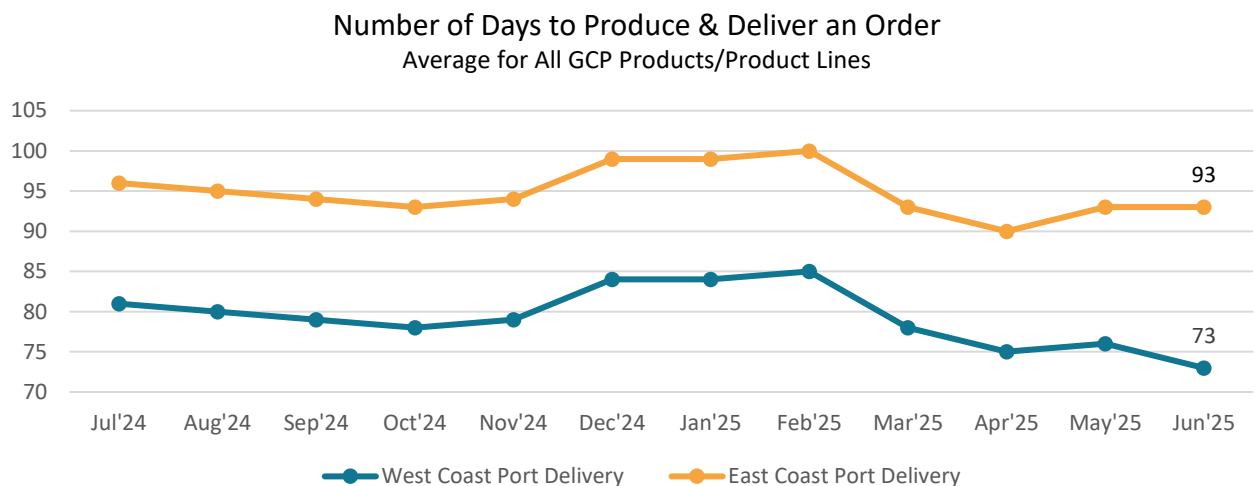
North American Load-to-Truck Ratio
Average Number of Loads Posted for Every Truck Posted



Key Takeaways:

- The national average spot rates have held largely flat for 2025 but have increased slightly for three straight months.
- Freight volumes have remained stagnant this year, largely due to the ongoing trade war and shifting policies surrounding it.
- Despite signs that the market is gradually moving toward a demand/supply equilibrium, a significant surplus of capacity persists. A recent reported noted that at the end of April, there remained approximately 90,000 more authorized for-hire trucking firms than in February 2020, equivalent to a 35% increase.

GCP Production Times



Key Takeaways:

- The chart above represents the aggregated time it takes for an average GCP order to be fulfilled, from submission of the purchase order to the delivery of the product. It consolidates data from all facilities into a single figure, including the time required to book a container—currently averaging 10.5 days—along with ocean shipping and all other transit times.
- For specific production times on each of our product lines and products, please see our June 2025 production index. ([View here](#))

Resources

Tariffs

- <https://www.ghy.com/tariff-tracker/>
- <https://www.bloomberg.com/news/articles/2025-06-27/china-says-it-confirms-trade-framework-details-with-us>
- <https://www.bloomberg.com/news/articles/2025-06-26/us-china-have-finalized-tariff-understanding-lutnick-says>
- <https://financialpost.com/pmn/business-pmn/us-china-truce-signed-10-trade-deals-imminent-lutnick-says>
- <https://www.reuters.com/business/autos-transportation/us-uk-trade-deal-be-completed-very-soon-says-starmer-2025-06-16/>

Raw Material Prices/Commodity Pricing

- <https://www.ismworld.org/supply-management-news-and-reports/reports/ism-report-on-business/pmi/may>

Natural Rubber Pricing

- <https://tradingeconomics.com/commodity/rubber>
- <https://businessanalytiq.com/procurementanalytics/index/natural-rubber-price-index/>

Global PMI Manufacturing/Global Sectors Heatmap

- <https://www.spglobal.com/marketintelligence/en/mi/research-analysis/monthly-pmi-bulletin-june-2025.html>
- https://cdn.ihsmarkit.com/www/pdf/6019452_6019446_0.1.pdf

Producer Prices

- <https://tradingeconomics.com/canada/producer-prices-change>
- <https://tradingeconomics.com/china/producer-prices-change>
- <https://tradingeconomics.com/india/producer-prices-change>
- <https://tradingeconomics.com/mexico/producer-prices-change>
- <https://tradingeconomics.com/united-states/producer-prices-change>

Imports to the United States

- <https://www.census.gov/foreign-trade/balance/c1220.html>
- <https://www.census.gov/foreign-trade/balance/c5700.html>
- <https://www.census.gov/foreign-trade/balance/c2010.html>
- <https://mexicobusiness.news/automotive/news/mexico-vehicle-exports-drop-109-april-hurt-us-tariffs>

Total Trade Volume

- <https://www150.statcan.gc.ca/n1/daily-quotidien/250605/dq250605a-eng.htm>
- <https://www150.statcan.gc.ca/n1/daily-quotidien/250605/t002a-eng.htm>
- <https://www150.statcan.gc.ca/n1/en/daily-quotidien/250605/dq250605a-eng.pdf?st=TIIlwQ-H>
- <https://www.bea.gov/news/2025/us-international-trade-goods-and-services-april-2025>
- https://www.census.gov/foreign-trade/Press-Release/current_press_release/ft900.pdf

U.S. Rubber Import & Export Stats

- https://www.census.gov/foreign-trade/Press-Release/current_press_release/ft900.pdf

Monthly U.S. Imports

- <https://nrf.com/media-center/press-releases/import-cargo-levels-expected-to-see-surge-during-pause-in-tariff-increases>

Ocean Schedule Reliability

- <https://nrf.com/media-center/press-releases/import-cargo-levels-expected-to-see-surge-during-pause-in-tariff-increases>
- <https://mykn.kuehne-nagel.com/news/article/seaexplorer-schedule-reliability-report-may-2-17-Jun-2025>

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