

Industrial Trade Report

By GCP Industrial Products

Report Highlights

- The U.S. is pursuing an aggressive, multi-tiered tariff strategy under its reciprocal framework, targeting countries with rates from 15% to 50%, depending on the outcome of bilateral negotiations.
- Raw material prices continued their upward trend in June, marking the ninth consecutive month of increases.
- Natural rubber prices have climbed to around 170 US cents per kilogram, their highest level since late May, supported by supply concerns despite weak global demand.
- Global economic expansion accelerated at the fastest pace in three months in June, backed by a renewed rise in manufacturing production driven by further inventory-building in the U.S.
- China's producer prices shrank -3.6% year-over-year (YOY) in June, marking the 33rd consecutive month of producer deflation and the steepest fall since July 2023.
- U.S. ports in June processed 2.06 million Twenty-Foot Equivalent Units (TEUs) up 5.9% from May but down 3.7% YOY.
- China's share of U.S. imports fell further to 28.8%, well below its July 2024 peak of 40.0%, as sourcing continues to diversify toward Southeast Asia and other regions.
- Most signs indicate that this year's ocean peak shipping season was early, brief, and muted, driven by frontloading orders earlier in the year by some and a wait-and-see approach by others.
- Truckload rates remained flat even though freight volumes were slightly stronger compared to May. However, both remain well below typical peak summer shipping season levels.

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Announced U.S. Trade Deals

Japan

- Original proposed tariff (April 2): 24%.
- New negotiated rate: 15% on auto imports and other key goods.
- Includes a commitment from Japan to import \$550 billion in U.S. goods.
- Steel and aluminum tariffs remain at 50% under Section 232 (unaffected by this deal).

Vietnam

- Original proposed rate (April 2): 46%.
- New arrangement: 20% tariff on Vietnamese exports to the U.S., plus a 40% anti-transshipment tariff targeting goods routed through Vietnam.
- U.S. goods enter Vietnam duty-free under the deal.

United Kingdom

- Original proposed rate (April 2): 10%.
- No elevated “reciprocal” tariffs, only the 10% baseline.
- A trade framework signed June 17 exempts the U.K. from new U.S. steel and aluminum tariffs (which otherwise rose to 50%); they instead face 25% on those metals.
- Other U.S. tariffs still apply unless goods qualify for existing exemptions.

China

- Original proposed rate (April 2): 34%.
- Tariffs quickly escalated to as high as 145%.
- Negotiated a temporary tariff reduction agreement.
- U.S. tariffs dropped from 145% to 30% for 90 days.
- Section 301 tariffs (25%) stack on top of the 30%.
- Chinese tariffs on U.S. goods reduced to ~10% during the 90-day period.
- This truce does not constitute a formal long-term trade deal.
- Terms expire in mid-August unless renewed.

Philippines

- Original proposed rate (April 2): 17%.
- President Trump announced that a formal trade deal with the Philippines had been concluded, setting the Philippine export tariff to the U.S. at 19%.
- The deal implies zero tariffs imposed by the Philippines on U.S. exports.
- The official Filipino side has not confirmed full detailed terms publicly, indicating talks were still being finalized as of late July.

Global Trade Negotiations

- The U.S. is pursuing an aggressive, multi-tiered tariff strategy under its reciprocal framework, targeting allies and competitors alike with rates from 15% to 50%, tied to the outcome of bilateral negotiations.
- President Trump suggested he would not set reciprocal tariff rates below 15% ahead of the Aug. 1 deadline, an indication that the floor for tariff rates is rising.
- Earlier this month Trump also declared that more than 150 countries including Latin American countries, Caribbean countries, and countries in Africa would receive a letter stating their tariff rate would be between 10%-15%.
- While Trump and his advisers initially expressed hopes of securing multiple deals, the president has been touting the tariff letters themselves as “deals”.
- Canada has downplayed hopes of an Aug. 1 deal, arguing that achieving a “good deal” is more important than hitting a deadline.
- If a deal isn’t struck by the start of the month, the U.S. has promised to raise tariffs on Canadian imports to 35%. The White House has said the administration plans to impose the tariff only on goods that do not comply with the United-States-Mexico-Canada Agreement, though the details will be up to Trump to decide.
- The European Union has said it believes a deal on trade tariffs with the US is “within reach”, ahead of the August 1 deadline when President Donald Trump has threatened to impose a sweeping 30% levy on EU imports.
- EU diplomats suggested the U.S. has proposed a broad 15% tariff on most European imports. The EU had initially hoped for a 10% baseline, along the same lines of the UK deal.
- Until now, the EU has refrained from imposing counter-tariffs on the U.S. However, if a deal can not be reached, then member states have agreed to hit back with a list of countermeasures on U.S. goods worth a total of €93bn (£81bn; \$109bn) that would kick in days after the U.S. tariffs.
- Mexican President Claudia Sheinbaum has stated Mexico is doing everything it can to avoid 30% U.S. tariffs on August 1.
- Mexico has made a series of proposals that have to do with reducing the trade deficit with the U.S., which is one of the main concerns of President Trump. President Sheinbaum also told reporters that the quantity of fentanyl seized by U.S. authorities at the Mexico-U.S. border has declined 50% since she took office last October.

Raw Material Pricing

Institute for Supply Management (IMS®) Price Index					
Month	Prices Higher	Prices Same	Prices Lower	Net	Index
June 2025	45.6%	48.1%	6.3%	+39.3	69.7
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
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					

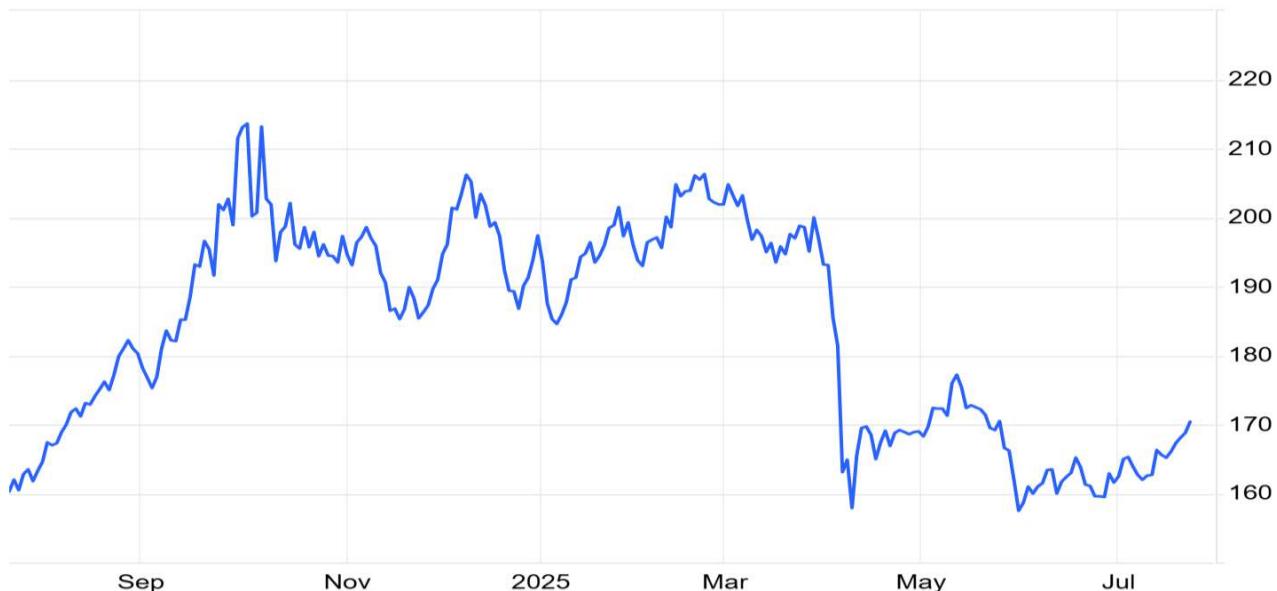
Key Takeaways:

- Raw material prices continued their upward trend in June, with the ISM® Prices Index registering 69.7%. While this is a slight increase from May's 69.4%, it marks the ninth consecutive month of increases.
- The Prices Index has increased 17.2% over the past six months. The last three months have brought the index's highest readings since June 2022 (78.5 percent).
- Increases in steel and aluminum prices continue to drive the index higher as they impact the entire value chain, as well as the general 10% tariff applied to many imported goods.
- In June, 15 of the 18 industries reported paying increased prices for raw materials, in order, they are: Textile Mills; Nonmetallic Mineral Products; Petroleum & Coal Products; Primary Metals; Miscellaneous Manufacturing; Food, Beverage & Tobacco Products; Wood Products; Machinery; Chemical Products; Electrical Equipment, Appliances & Components; Computer & Electronic Products; Fabricated Metal Products; Furniture & Related Products; **Plastics & Rubber Products**; and Transportation Equipment.
- 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 (4) Labor
Aluminum (19) Antimony Corrugated Boxes (4) Electrical Components (5) Electronic Components (5) Natural Gas Packaging Materials Paper Products (2) Steel (5) Steel - Stainless (4) Steel Products (4)	Steel - Hot Rolled	<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 climbed to around 170 US cents per kilogram, their highest level since late May, driven by supply concerns despite weak global demand. Unusually heavy rainfall during the typical dry season in Thailand and Indonesia (the world's top suppliers) has delayed harvesting. In China, Beijing's move to regulate electric vehicle competition may provide some price support as aggressive discounting in the auto sector has previously exerted downward pressure on rubber used in tires.

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.

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

Key Takeaways:

- Global economic expansion accelerated at the fastest pace in three months in June, supported by a renewed rise in manufacturing production driven by further inventory-building in the U.S.
- While the improvement in the manufacturing sector is a positive sign, persistent inventory accumulation in the U.S., coupled with elevated price pressures from tariffs, is fueling concerns about a potential demand slowdown in the second half of 2025.

Global Sectors Heatmap

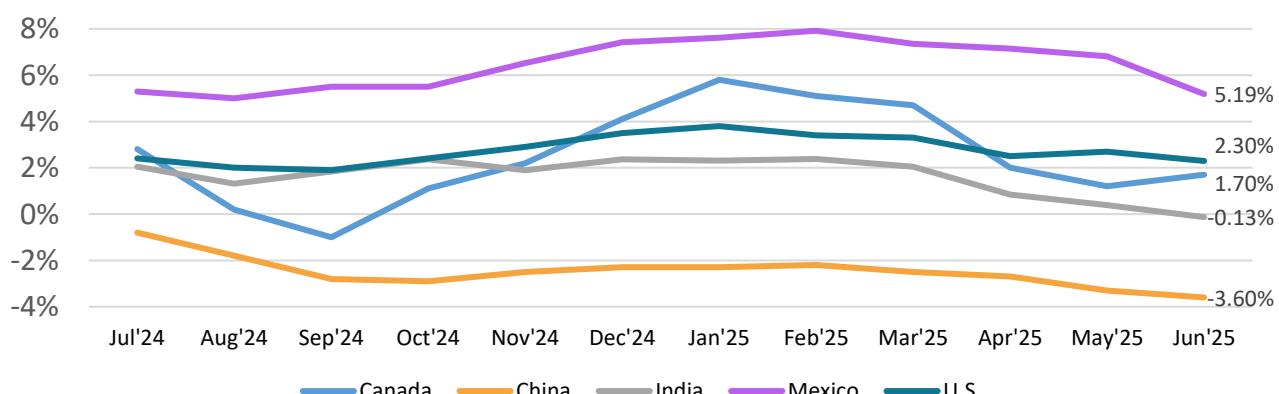
	Jul 24	Aug 24	Sept 24	Oct 24	Nov 24	Dec 24	Jan 25	Feb 25	Mar 25	Apr 25	May 25	Jun 25
Basic Materials	Grey	Orange	Orange	Light Orange	Orange	Orange	Light Orange	Green	Orange	Orange	Orange	Light Orange
Chemicals	Light Green	Orange	Orange	Orange	Green	Green	Green	Green	Orange	Orange	Orange	Green
Resources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

Key Takeaways:

- The basic materials sector is under pressure due to sharply rising input costs, largely driven by tariffs. While mining activity has declined slightly, materials-intensive manufacturing has remained stable or shown modest gains. Softening global demand remains a concern.
- The industrials sector has largely been in growth mode since February, with most segments showing accelerating momentum in June. Propelled by increased production, there is concern that weaker order flows and ongoing employment cuts could dampen the outlook.

Producer Prices by Country

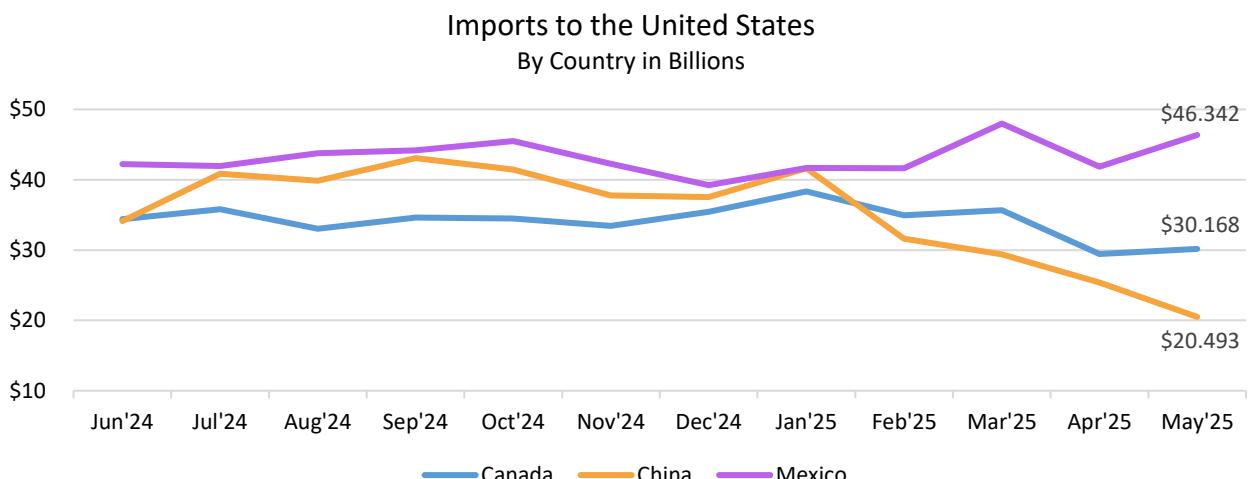
Producer Prices by Country
Percent Change Per Month Year Over Year



Key Takeaways:

- U.S. producer prices fell to 2.3% in June, the lowest since September 2024. Following outsized increases in December and January. Prices have been trending comfortably below the 2% inflation target including flat to down readings in three of the past four months.
- China's producer prices shrank -3.6% YOY in June, marking the 33rd consecutive month of producer deflation and the steepest fall since July 2023. The drop was mainly attributed to rising external risks amid uncertainty over U.S. tariffs and persistently weak domestic demand.
- India's wholesale price inflation unexpectedly fell by -0.13% YOY, marking the first annual decline since October 2023. In addition, manufacturing inflation eased to 1.97%, its lowest level since October 2024, reflecting softer cost increases across most subcomponents including a notable slowdown in rubber and plastic products.

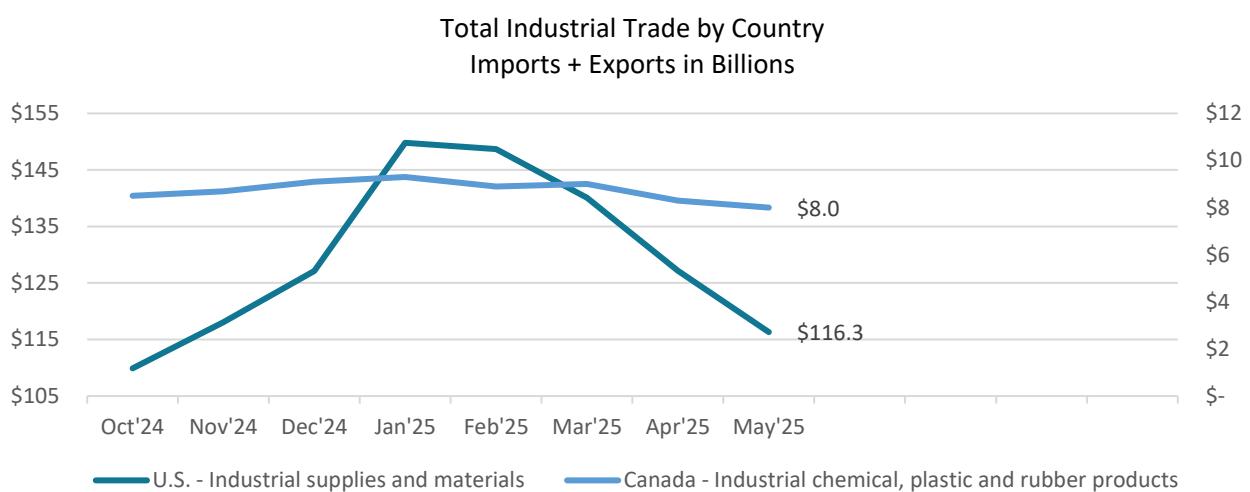
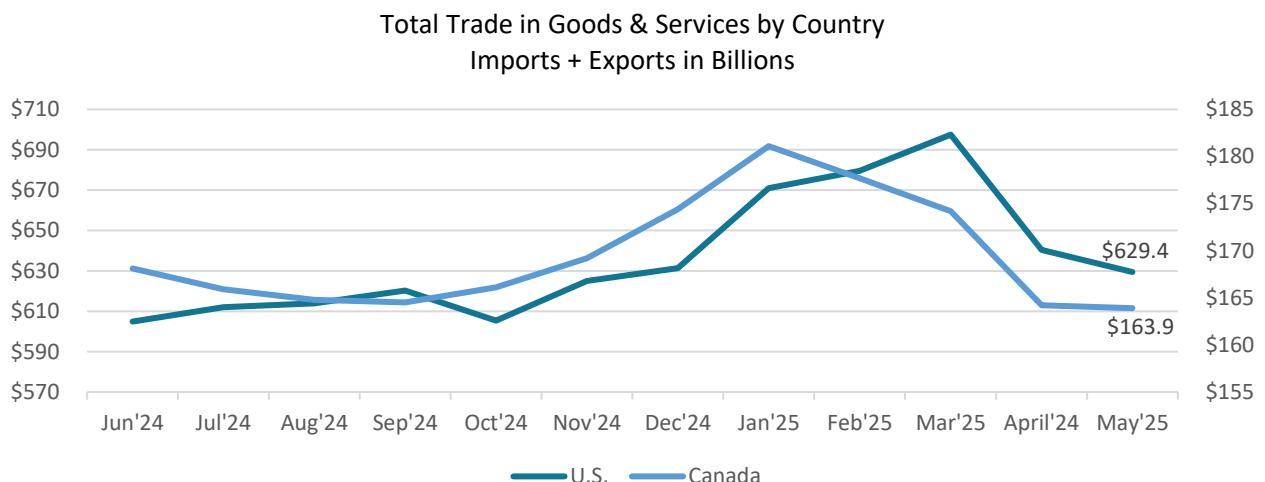
Imports to the United States



Key Takeaways:

- Canadian exports to the U.S. experienced a modest 0.5% increase from April's numbers but remain around 14% lower than last year amid tariffs on steel and aluminum as well as the prospect of future tariffs.
- In April, tariffs surged to 145% on many Chinese goods, prompting a shift away from importing from China. In mid-May the tariffs were reduced to 30-55% under a temporary pause.
- Imports from Mexico surged driven by strong gains in energy shipments and intermediate goods, as companies accelerated cross-border sourcing amid supply chain disruptions from Asia.

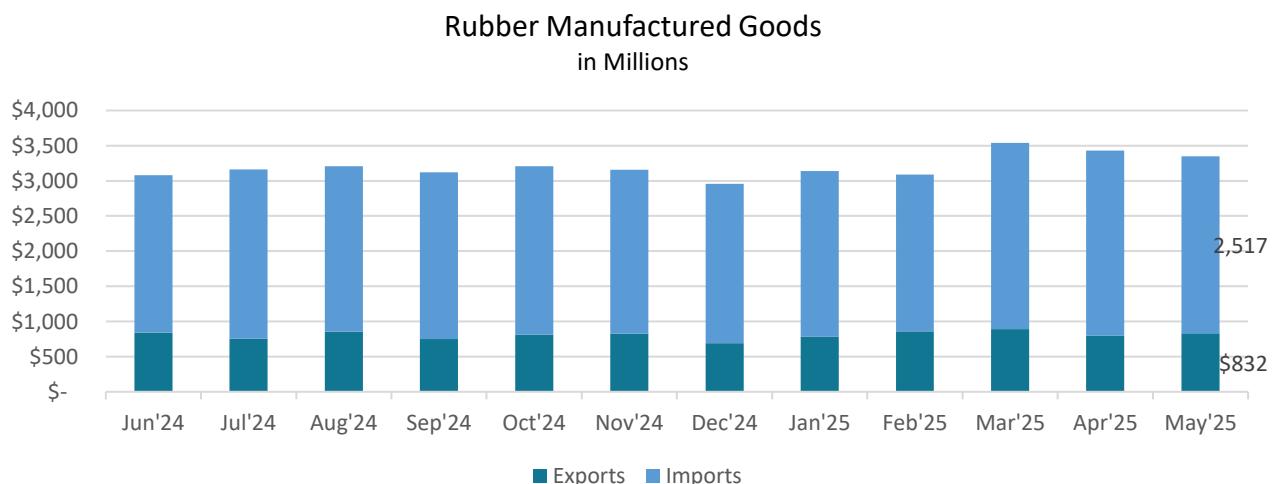
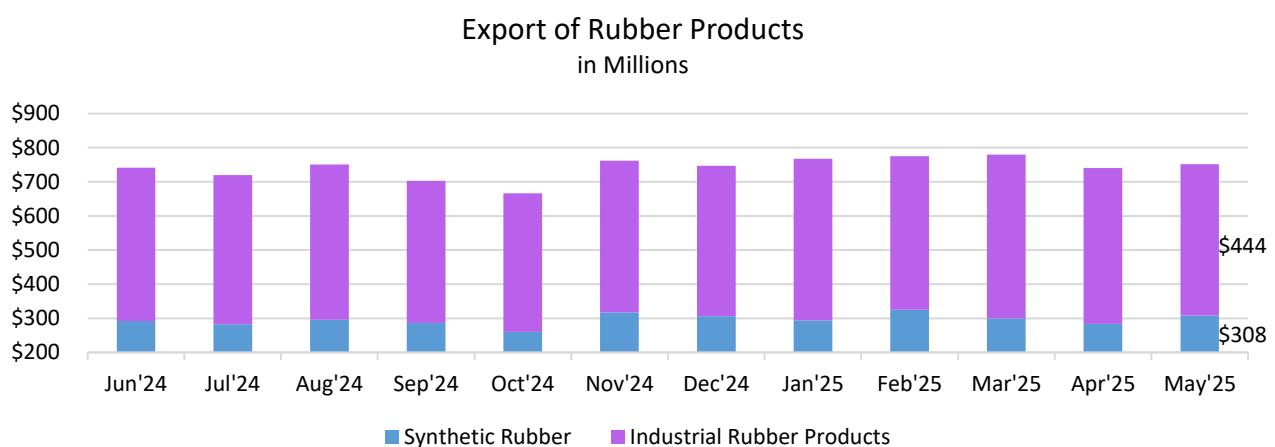
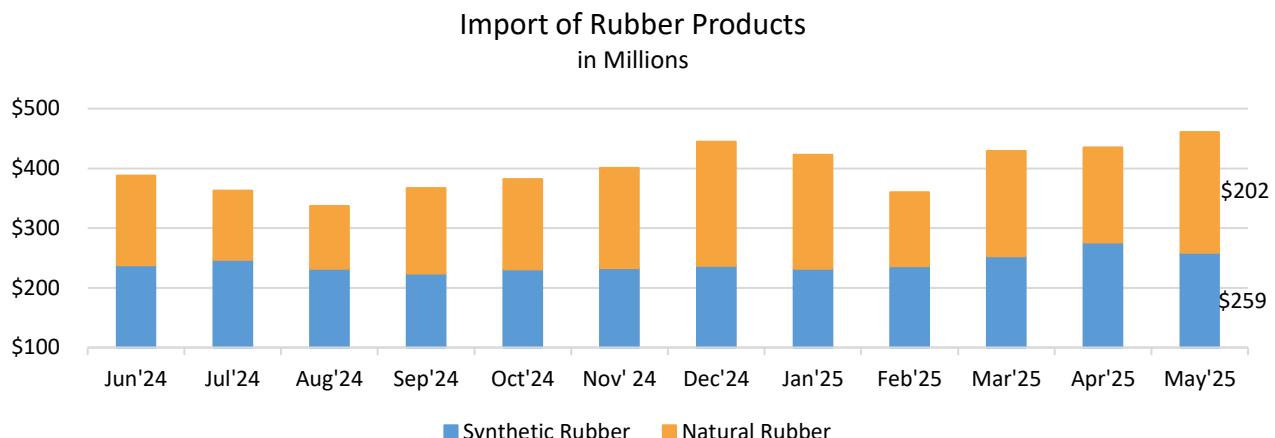
Total Trade Volume



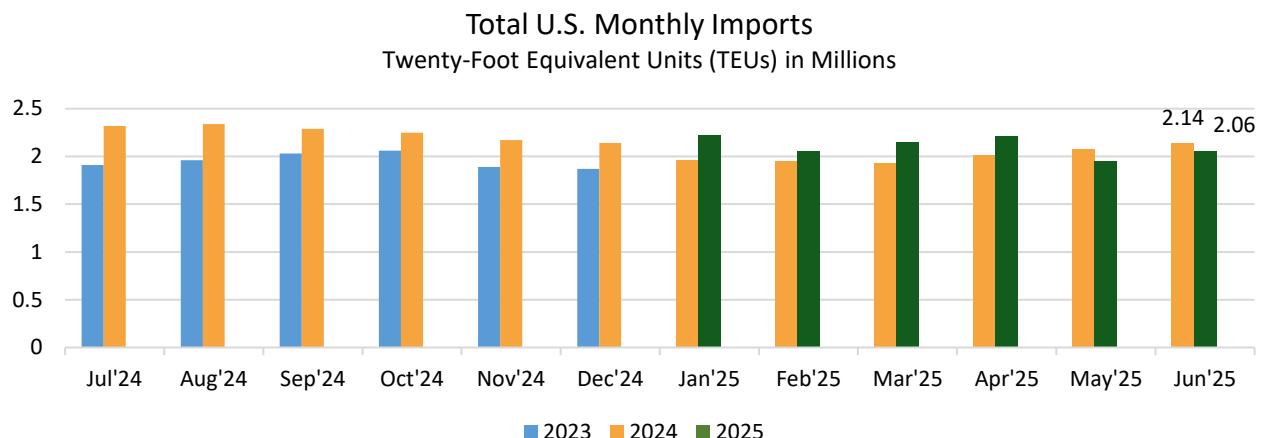
Key Takeaways:

- 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 reduced -13% month-over-month (MOM), while imports dropped -1.75% for the third consecutive month.
- In Canada, exports of the industrial chemical, plastic and rubber products sector, continued their MOM decline, decreasing -3.2% while imports also declined -2.4% for the month.

U.S. Rubber Import & Export Stats



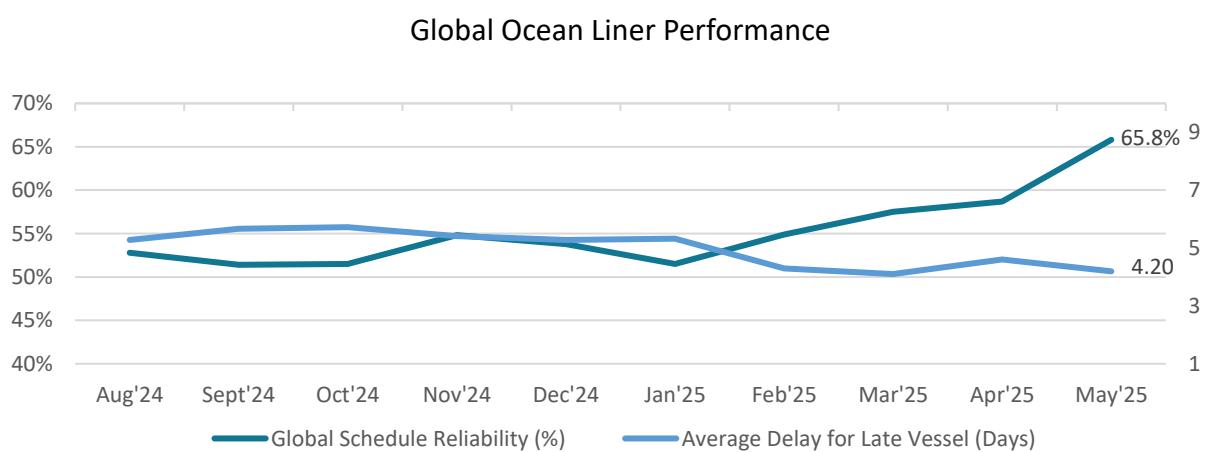
Monthly U.S. Imports



Key Takeaways:

- U.S. ports in June processed 2.06 million Twenty-Foot Equivalent Units (TEUs) up 5.9% from May but down 3.7% YOY.
- The totals bring the first half of 2025 to 12.63 million TEUs, up 4.5% YOY. That's better than the 12.54 million TEU forecast last month, but still below the 12.78 million TEU forecast earlier this year before the April tariffs announcement.

Global Ocean Schedule Reliability



Key Takeaways:

- Global ocean schedule reliability (measuring 60+ carriers) improved a sharp 7.4% MOM to 65.8%, the highest level since November 2023. In addition, the average arrival delay of late vessels improved to 4.2 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	1	0 days	6 days
	OAK	5	0 days	4 days
	SEA/TAC	1	0 days	6 days
Canada West Coast	Van	1	1 day	5 days
	PRR	3	0 days	4 days
U.S. East Coast / Gulf Coast	NY/NJ	5	5 days	3 days
	BAL	7	0 days	3 days
	NOR	4	1 day	3 days
	CHS	0	0 days	3 days
	SAV	2	2 days	2 days
	HOU	2	4 days	8 days

Improving over last month		Consistent over last month		Deteriorating over last month	
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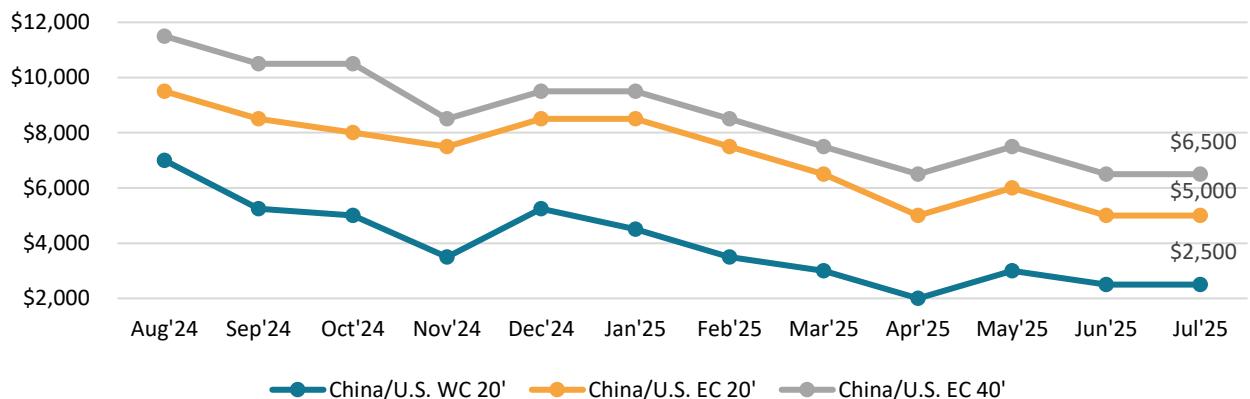
Key Takeaways:

- The Port of Los Angeles reported its busiest June ever, handling 892,340 TEUs, marking an 8% increase in container traffic from the same month a year ago.
- “Importers are bringing in year-end cargo now ahead of potential higher tariffs later in the year,” Port of Los Angeles Executive Director Gene Seroka said in a media briefing. His comments highlighted how importers are adapting to potential shifts in trade policies by frontloading shipments amid a consistently evolving tariff environment.
- U.S. imports from China also edged up slightly in June to 639,300 TEUs, a 0.4% increase from May, but are 28.3% lower YOY, sustaining the steep drop that began earlier in the year under elevated tariffs.
- China’s share of U.S. imports fell further to 28.8%, well below its July 2024 peak of 40.0%, as sourcing continues to diversify toward Southeast Asia and other regions.
- Container volumes at the top 10 U.S. ports increased 3.1% compared to the previous month, with a combined net gain of 55,733 TEUs. The growth was driven by the West Coast, where Los Angeles saw a 29.1% increase, Long Beach increased 18.8%, and Tacoma increased 33.3%.

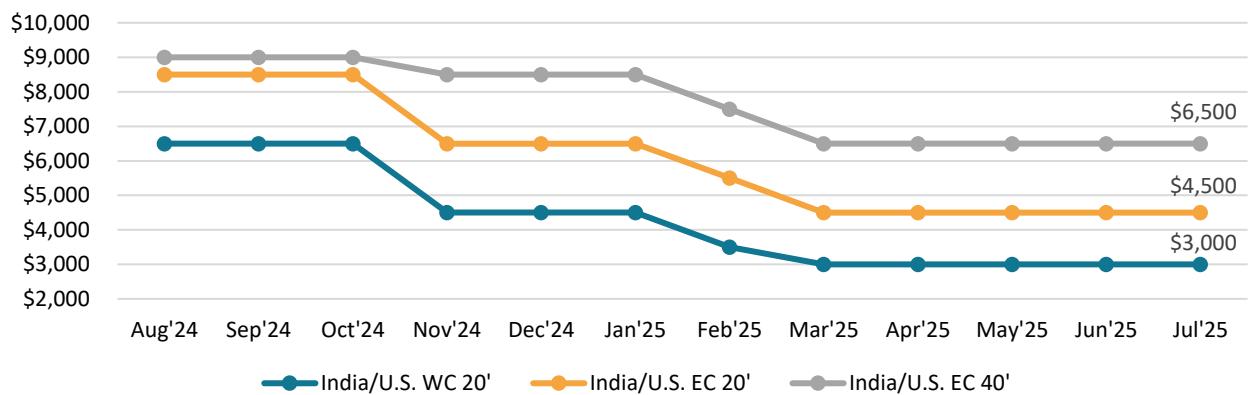
Ocean Freight

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

Average GCP/China Container Cost, U.S. Dollars



Average GCP/India Container Cost, U.S. Dollars

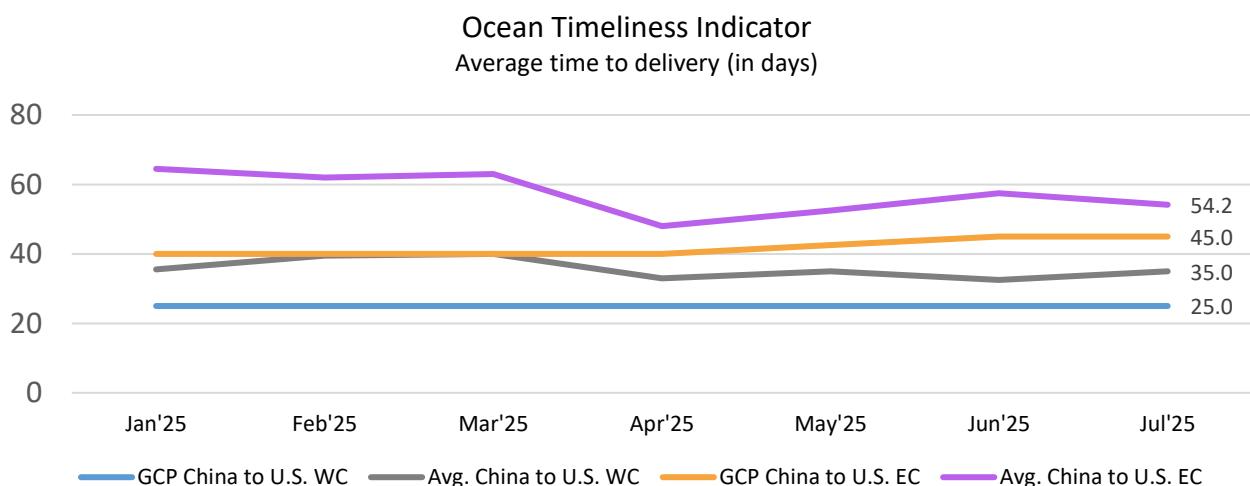


Key Takeaways:

- Most signs indicate that this year's ocean peak shipping season was early, brief, and muted, driven by frontloading orders earlier in the year by some and a wait-and-see approach by others.
- The slowdown in frontloading of cargo from Asia to North America has led to increased capacity, giving importers improved rate leverage for now.
- Ocean rates reflect these dynamics as the mid July general rate increase (GRI) planned by many carriers did not materialize as demand has continued to ease since late June. Rates from China to the U.S. are now roughly even with April/May levels, when the U.S. imposed 145% tariffs on Chinese goods, triggering a sharp drop in demand.

- In response to the initial drop in demand, carriers removed 30% of U.S. West Coast (USWC) and 40% of U.S. East Coast (USEC) vessel capacity in May. However, capacity restored in early June (after a tariff pause was announced) exceeded actual demand, further driving down rates.
- Demand will likely adjust again in the coming weeks, as the date for reinstating the higher U.S. tariffs has moved from July 9 to August 1. Specifically for Chinese imports, the lowered reciprocal tariff rate is set to expire on August 12.
- Lower demand is expected to continue through July as the effects of tariff-driven frontloading dissipate.
- Carriers are expected to implement blank sailings to the USWC in the coming weeks to manage oversupply. USEC and Gulf routes, however, are maintaining more balanced supply-demand dynamics, which continues to support stronger rate levels in those corridors.
- As we move into August and beyond carriers may pause further rate hikes to maintain current price levels in an attempt to attract more volume.

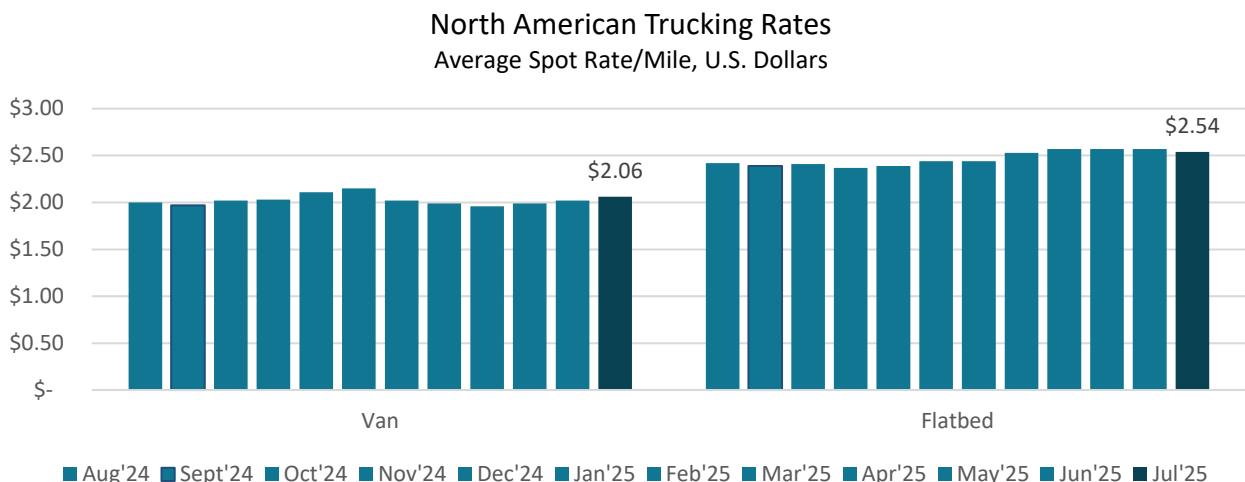
Ocean Timeliness Indicator



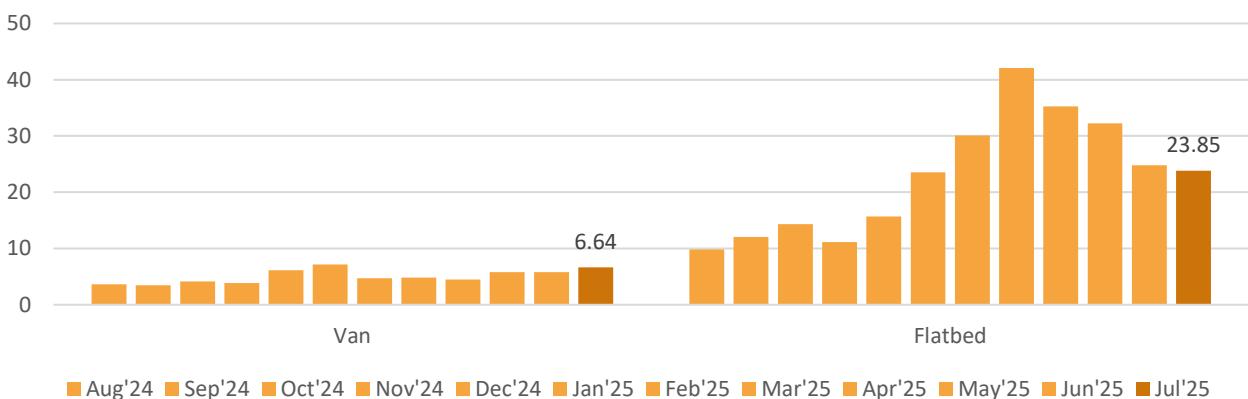
Key Takeaways:

- 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



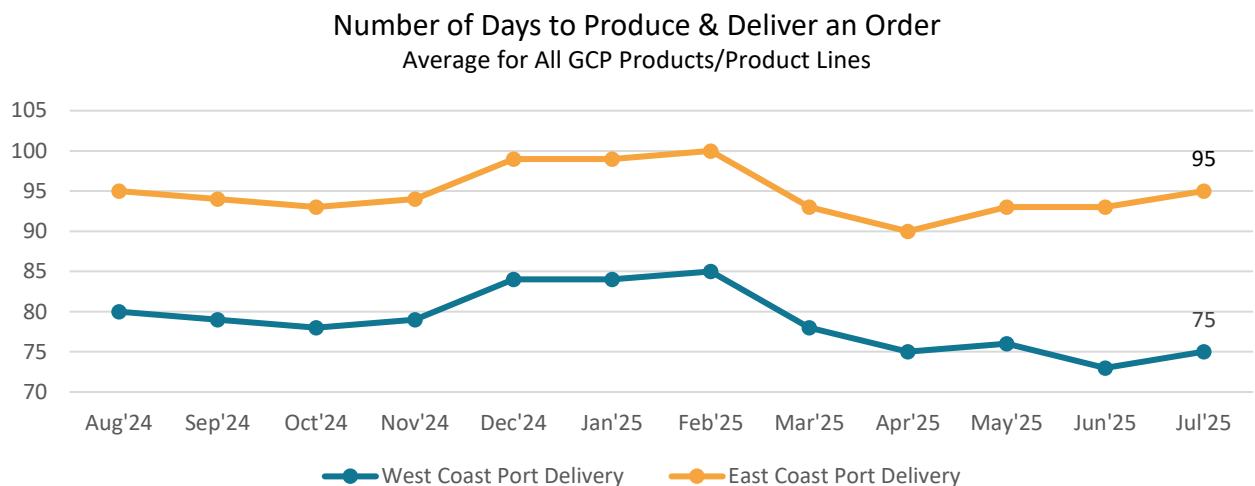
North American Load-to-Truck Ratio
Average Number of Loads Posted for Every Truck Posted



Key Takeaways:

- With the first half of 2025 now concluded, the outlook for both the transportation industry and the broader economy remains as ambiguous as it was six months ago. A mix of forces continues to shape the landscape as businesses contend with evolving trade policies and macroeconomic headwinds.
- Truckload rates remained flat even though freight volumes were slightly stronger compared to May. However, both remain well below typical peak summer shipping season levels.
- The sustained rise in tender rejections compared to 2024 levels indicates an ongoing contraction in capacity, suggesting tighter market conditions may emerge amid continued carrier attrition.

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 July 2025 production index. ([View here](#))

Resources

Tariffs

- <https://www.npr.org/2025/07/12/nx-s1-5463818/trump-tariff-rate-letters>
- <https://www.bloomberg.com/news/articles/2025-07-23/trump-says-countries-will-face-tariffs-ranging-from-15-to-50>
- <https://www.weforum.org/stories/2025/07/global-trade-tensions-escalate-amid-new-us-tariffs-and-other-international-trade-stories-to-know-this-month>
- <https://finance.yahoo.com/news/trump-says-countries-face-tariffs-214729537.html>
- <https://www.politico.com/news/2025/07/22/canada-trump-deal-aug-00468568>
- <https://www.bbc.com/news/articles/c0565zdjq6vo>
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Raw Material Prices/Commodity Pricing

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