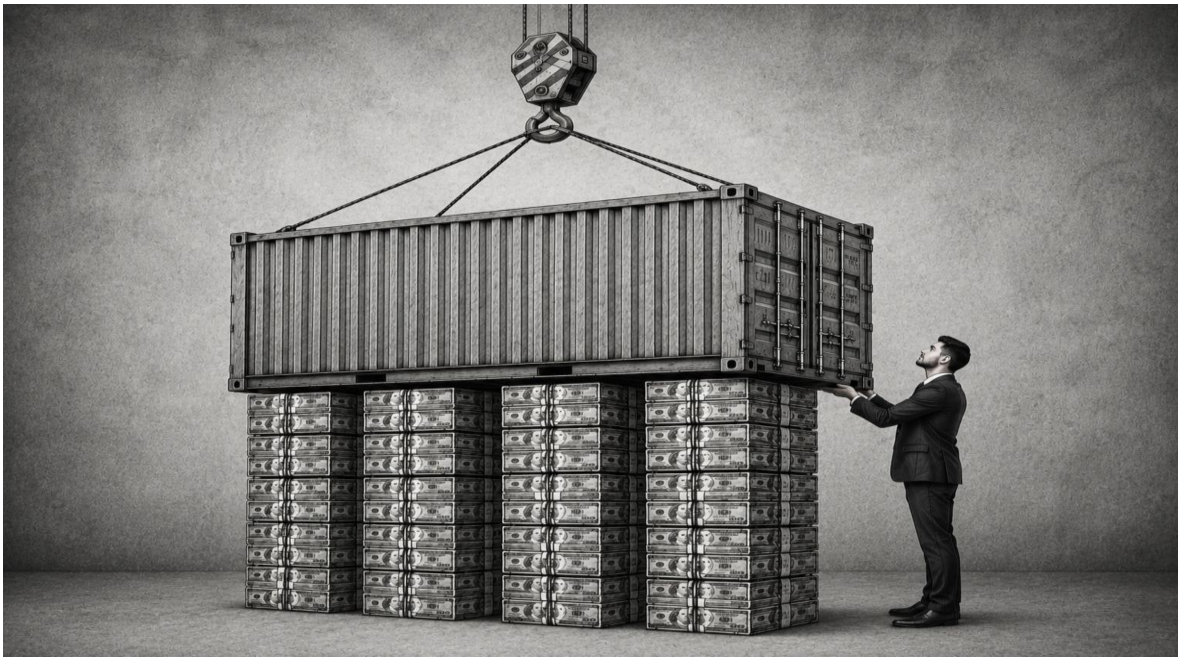
GCP



INDUSTRIAL TRADE REPORT | July 2026

GROWTH AT A HIGHER COST

Through the first seven months of 2026, the industrial economy has continued to outperform expectations despite operating under an increasingly complex set of conditions. Manufacturing remains in expansion, trade volumes continue to hold near historically strong levels, and pricing pressures across several raw material markets are beginning to moderate. Yet the environment is no less challenging. Freight costs are rising again, geopolitical tensions continue to reshape global logistics, and another round of tariff decisions threatens to redefine international trade flows. The industrial economy has shown an impressive ability to adapt throughout 2026, but that resilience is becoming progressively more expensive. Businesses are proving they can adapt and manage through disruption. The greater challenge now is absorbing steadily rising costs while maintaining the momentum built over the first half of the year.

By GCP Industrial Products

Executive Brief

Throughout 2026, we've followed an industrial economy that has consistently adapted to disruption rather than succumbed to it. July suggests that story remains intact, but it also marks an important shift. The challenge is becoming less about navigating disruption itself and more about managing the growing cost of remaining resilient.

Industrial growth remains intact - Global manufacturing has now expanded for eleven consecutive months, while industrial production and trade activity continue to outperform expectations despite increasingly complex market conditions.

Raw material inflation is showing signs of easing - Input costs remain elevated, but June recorded the largest monthly decline in the ISM Prices Index since mid-2022. Pricing pressure has moderated, although most industries continue reporting higher raw material costs.

Rubber markets offer a measure of relief - Prices for natural rubber, SBR, EPDM, NBR, and neoprene all declined during the month, providing some welcome cost relief following several months of elevated pricing.

Trade volumes remain historically resilient - U.S. imports, container volumes, and sheet rubber shipments continue to hold near multi-year highs, reinforcing that underlying industrial demand remains stronger than many anticipated.

China remains central to global sourcing - Despite continued diversification into markets such as India, Mexico, and Taiwan, China's manufacturing scale and competitive pricing continue to support exceptionally strong import activity across multiple industrial sectors.

Freight markets are tightening once again - Ocean freight rates have risen sharply as geopolitical disruption, port congestion, and tighter vessel capacity combine to increase transportation costs after several months of improving conditions.

Trade policy uncertainty is entering a new phase - The expiration of the temporary global tariff program and the possibility of new country-specific measures introduce another layer of cost uncertainty for sourcing and procurement decisions.

Contents

Tariffs

Temporary 10% Global U.S. Tariff

- The 10% global tariff put in place in February 2026 is scheduled to end July 24, 2026, as the 150-day temporary permit comes to a close.
- The Trump administration has three options moving forward. 1) extend it using a different legal authority, if available; 2) replace it with new tariffs under other trade statutes; or 3) allow it to expire.
- The administration has confirmed a new 10 to 12.5% Section 301 tariffs on roughly 60 trading partners accounting for 99% of U.S. imports will replace the global tariffs.
- “The United States has had a forced labor import ban for nearly a century and rigorously enforces it; it’s well past time for our trading partners to do the same,” said U.S. Trade Representative Jamieson Greer.
- The new tariffs will take effect just as temporary 10% worldwide tariffs expire at 12:01 a.m. Friday July 24, 2026.

Tariff on Canada

- On July 20, President Trump announced 50% tariffs on nearly US$20 billion worth of Canadian imports, including products such as dairy, liquor, cement, clothing, and honey.
- The tariffs are scheduled to take effect on August 19, 2026 and are separate from the temporary 10% global tariff that expires on July 24.
- The new measures affect about 5% of Canada's exports to the U.S. Products such as energy, potash, critical minerals, fish, and goods already subject to Section 232 steel and aluminum tariffs are excluded from this latest round.
- The White House says the measures are intended to address what it views as discriminatory Canadian policies affecting U.S. industries, including automobiles, dairy, and alcohol.
- The administration is using Section 338 of the Tariff Act of 1930, a legal authority that has rarely been invoked in modern times.

Raw Material Pricing

Institute for Supply Management (ISM®) Price Index					
Month	Prices Higher	Prices Same	Prices Lower	Net	Index
Jun 2026	55.1%	35.7%	9.2%	+45.9	73.0
May 2026	66.3%	31.5%	2.2%	+64.1	82.1
Apr 2026	70.3%	28.5%	1.2%	+69.1	84.6
Mar 2026	59.4%	37.8%	2.8%	+56.6	78.3
Feb 2026	45.4%	50.2%	4.4%	+41.0	70.5
Jan 2026	29.0%	59.9%	11.1%	+17.9	59.0
Dec 2025	26.4%	64.1%	9.5%	+16.9	58.5
Nov 2025	27.2%	62.6%	10.2%	+17.0	58.5
Oct 2025	27.3%	61.4%	11.3%	+16.0	58.0
Sep 2025	32.5%	58.8%	8.7%	+23.8	61.9
Aug 2025	33.5%	60.4%	6.1%	+27.4	63.7
Jul 2025	35.4%	58.8%	5.8%	+29.6	64.8
2025 Index Average Jan.-Dec.					63.4
2024 Index Average Jan.-Dec.					53.6
2023 Index Average Jan.-Dec.					46.6
2022 Index Average Jan.-Dec.					64.7

Price index under 50 means prices are decreasing	
Price index above 50 means prices are increasing	

Key Takeaways:

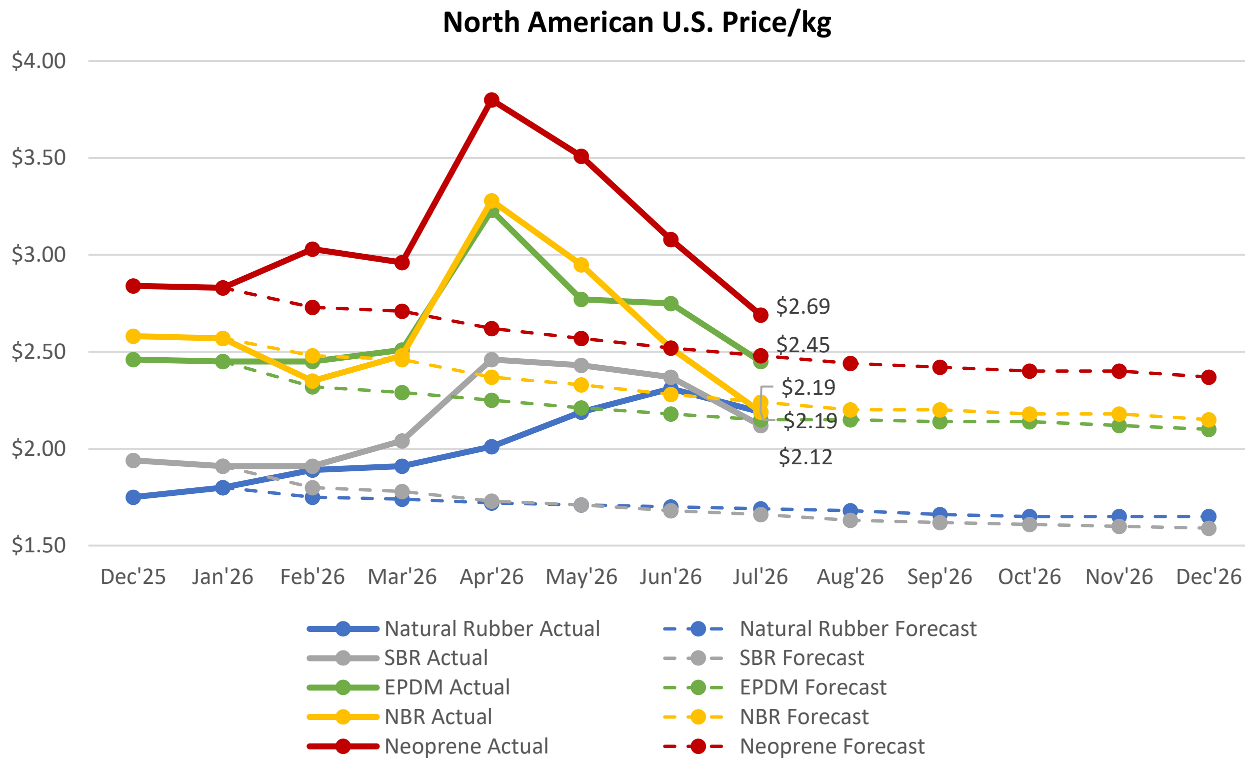
- The ISM® Prices Index registered 73% in June, indicating raw materials prices increased for the 21st straight month. However, this is the largest month-over-month (MoM) decrease in the index since July 2022, when it dropped 18.5 percentage points.

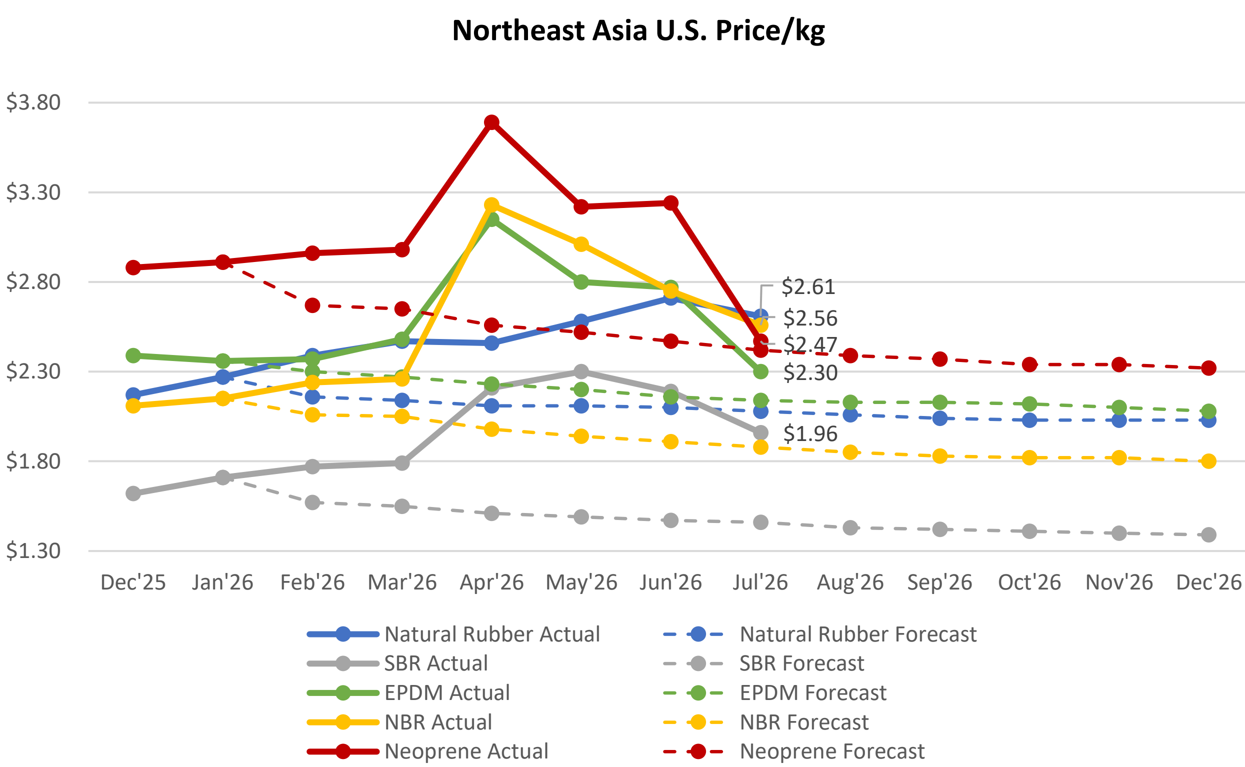
- Overall prices are still greatly elevated and being driven by (1) increases in steel and aluminum costs that impact the entire value chain, (2) tariffs applied to many imported goods, and (3) higher petroleum-based product costs resulting from the Middle East conflict.

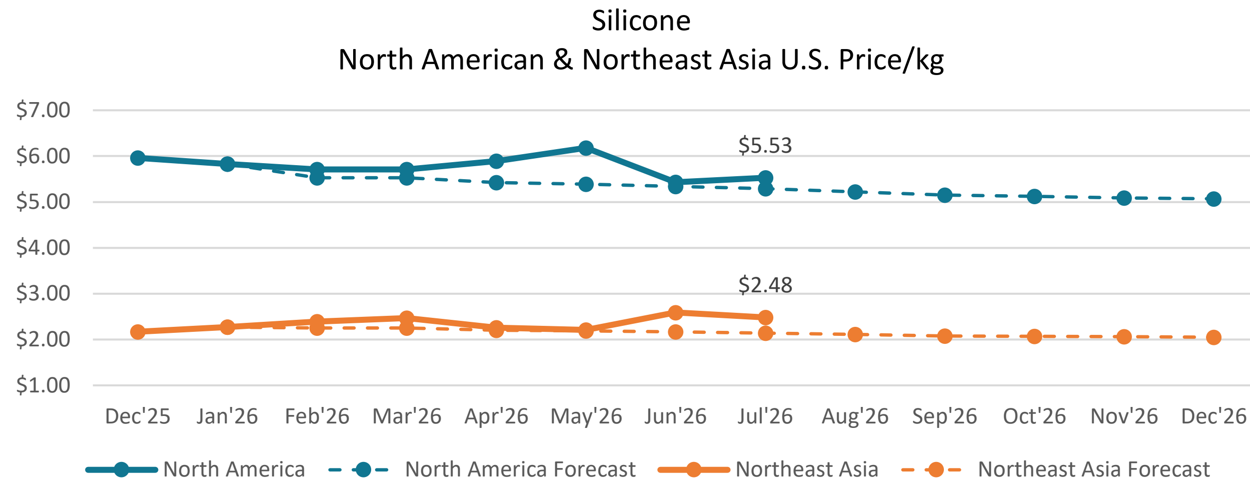
- In June, 15 of 18 industries reported paying increased prices for raw materials: Electrical Equipment, Appliances & Components; Nonmetallic Mineral Products; Fabricated Metal Products; Miscellaneous Manufacturing; Machinery; Primary Metals; Wood Products; **Plastics & Rubber Products**; Paper Products; Computer & Electronic Products; Transportation Equipment; Furniture & Related Products; Textile Mills; Chemical Products; and Food, Beverage & Tobacco Products.

- Only one industry (Petroleum & Coal Products) reported paying decreased prices for raw materials in June.

Rubber Pricing







Month-Over-Month Change:

Natural Rubber
North America: US$2.19/kg, down $0.12
Northeast Asia: US$2.61/kg, down $0.10

NBR
North America: US$2.19/kg, down $0.33
Northeast Asia: US$2.56/kg, down $0.19

SBR
North America: US$2.12/kg, down $0.25
Northeast Asia: US$1.96/kg, down $0.23

Neoprene
North America: US$2.69/kg, down $0.39
Northeast Asia: US$2.47/kg, down $0.77

EPDM
North America: US$2.45/kg, down $0.30
Northeast Asia: US$2.30/kg, down $0.47

Silicone
North America: US$5.53/kg, up $0.10
Northeast Asia: US$2.48/kg, down $0.11

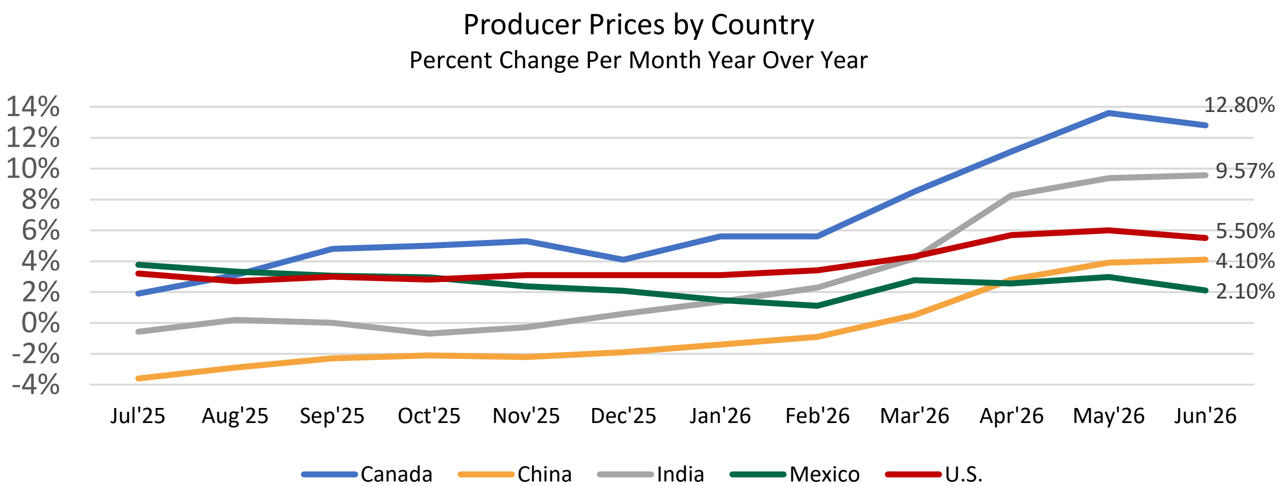
July Summary:

- Global natural rubber prices have eased to around 217 U.S. cents per kg in late July, as weather-related disruptions in key rubber-producing countries had little impact on the broader seasonal increase in supply.

- Thailand, the world's largest rubber producer, has entered its peak tapping season, with output in the south beginning to recover as rainfall eased in late June and early July. Adding to downside pressure, EU anti-dumping tariffs on Chinese tire imports fueled concerns over weaker demand for natural rubber, while China's slowing economy and a ninth consecutive monthly decline in vehicle sales in June further dampened the demand outlook.

- Meanwhile, elevated oil prices limited some losses by making synthetic rubber more expensive, boosting the competitiveness of natural rubber.

Producer Prices By Country



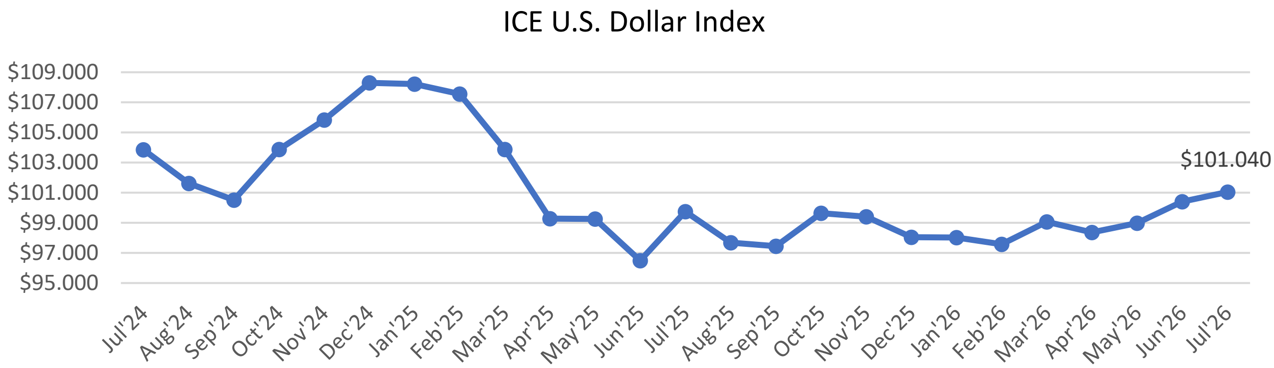
Key Takeaways:

- U.S. producer prices declined 0.3% in June, with nearly two-thirds of the decrease attributable to a 12.0% drop in gasoline prices and declines across other energy-related categories, including diesel fuel, jet fuel, and crude petroleum. Further upstream in the supply chain, prices for unprocessed and processed intermediate goods fell 1.2% and 4.1%, respectively, largely reflecting lower energy processing costs. Despite the monthly decline, producer prices have increased 5.5% over the past year, more than double the 2.4% change from the twelve months ending in June 2025.

- China's producer prices increased 4.1% year-over-year (YoY) in June, accelerating from the previous month. It was the fourth consecutive monthly increase, driven by firmer commodity prices and rising production costs as geopolitical tensions in the Middle East continued to underpin global energy and raw material markets. Production-material costs accelerated (5.5% vs 5.2% in May), while raw-material price growth remained elevated at 8.6%, compared with 9.2% in May.

- India's wholesale prices rose 9.57% year-on-year (YoY) in June, primarily driven by a sharp increase in fuel prices, which surged 27.41%, alongside continued momentum in manufacturing inflation. Manufacturing inflation remained elevated at 7.48%, marking its fastest pace since August 2022. The increase was largely supported by higher prices in chemicals and chemical products, which rose 12.78% (compared with 13.40% previously), and basic metals, which increased 12.31% (versus 12.30% previously).

Foreign Exchange



Key Takeaways:

- The ICE U.S. Dollar Index (DXY) is a benchmark measuring the value of the USD against a basket of six major currencies (EUR, JPY, GBP, CAD, SEK, CHF). It serves as a key indicator for the currency's strength.

- A weaker U.S. dollar generally makes it more expensive for businesses to import goods from Asia, as it reduces purchasing power.

- On the flip side, a dip in the dollar can help U.S. producers export more, since their goods become cheaper for foreign buyers. It could also boost the bottom line of multinational companies with overseas operations as it would inflate revenues in dollar terms, while expenses (like the salaries of stateside executives) remain stable.

Current Market Summary:

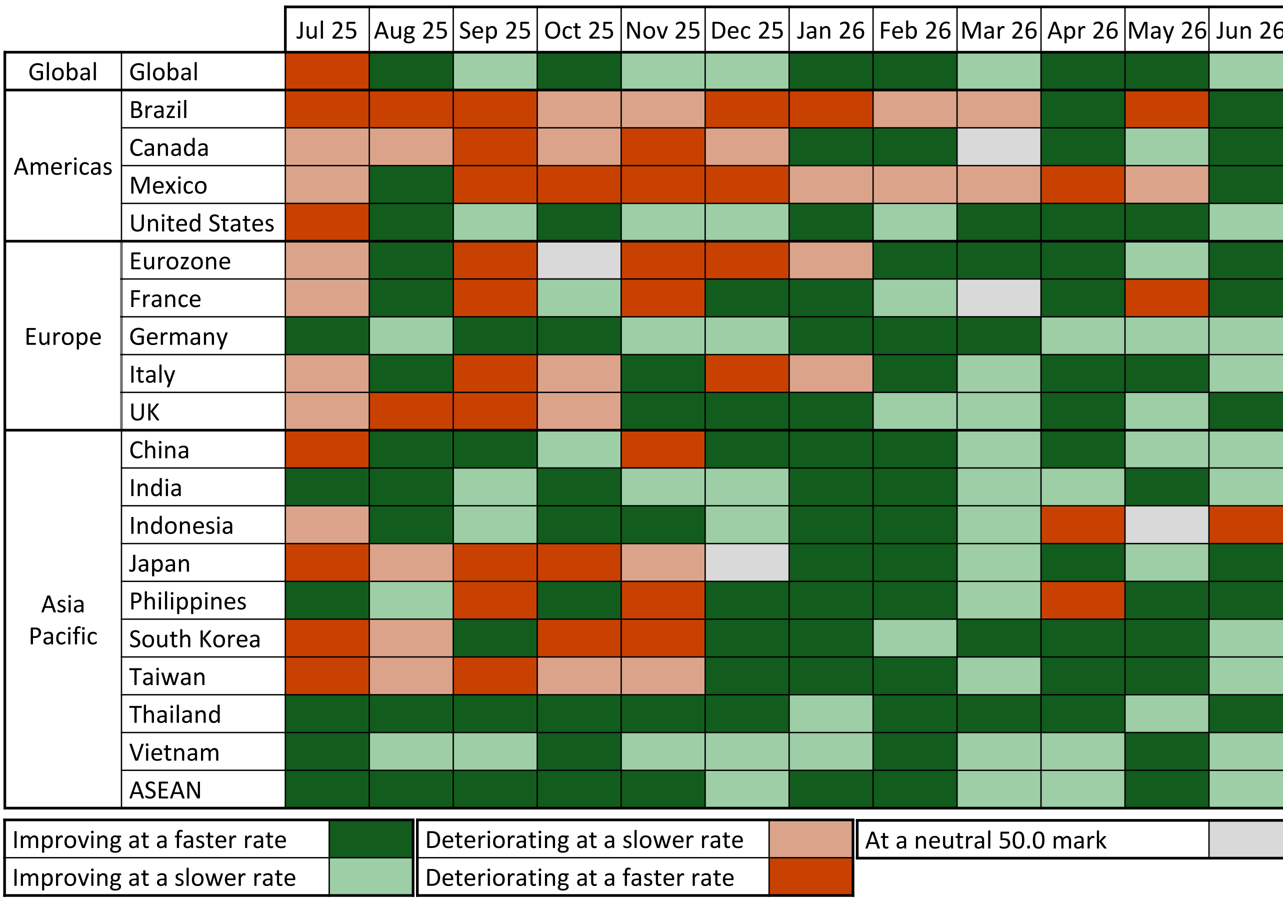
- The U.S. dollar has strengthened in recent weeks, supported by resilient U.S. economic data, elevated Treasury yields, and expectations that the Federal Reserve will keep monetary policy restrictive for longer.

- Additionally, elevated geopolitical risks have boosted safe-haven demand, further underpinning the U.S. dollar's recent strength.

- Supportive factors for the U.S. dollar are expected to remain in place over the near term, although further appreciation appears increasingly constrained beyond Q3.

Global PMI Manufacturing Heatmap

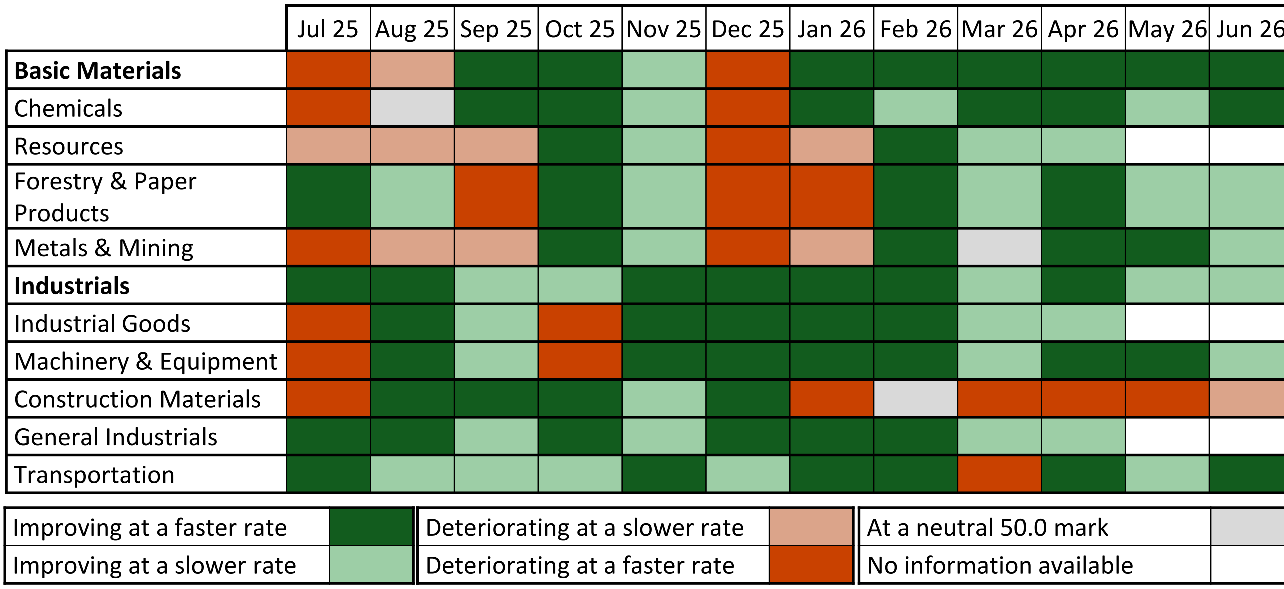
Included components for calculating the manufacturing conditions of each country are: Production output, new orders, new export orders, backlogs of work, employment, input prices, output prices, future expectations, quantity of purchases, suppliers' delivery times, stocks of purchases, stocks of finished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



Key Takeaways:

- Manufacturing production rose for the 11th consecutive month in June, with production still expanding at a solid pace across continents.
- Growth was registered in mainland China, the U.S., the euro area, Japan and the UK, with rates of expansion easing in the first two but accelerating in the latter three.
- However, there were some signs that the nearly year-long upturn may have passed its peak. Overall global growth of both output and new orders eased, employment decreased and business optimism fell for the first time in three months. Incoming new business rose for the sixth month in a row, but at the slowest pace since March.

Global Sectors Heatmap



Key Takeaways:

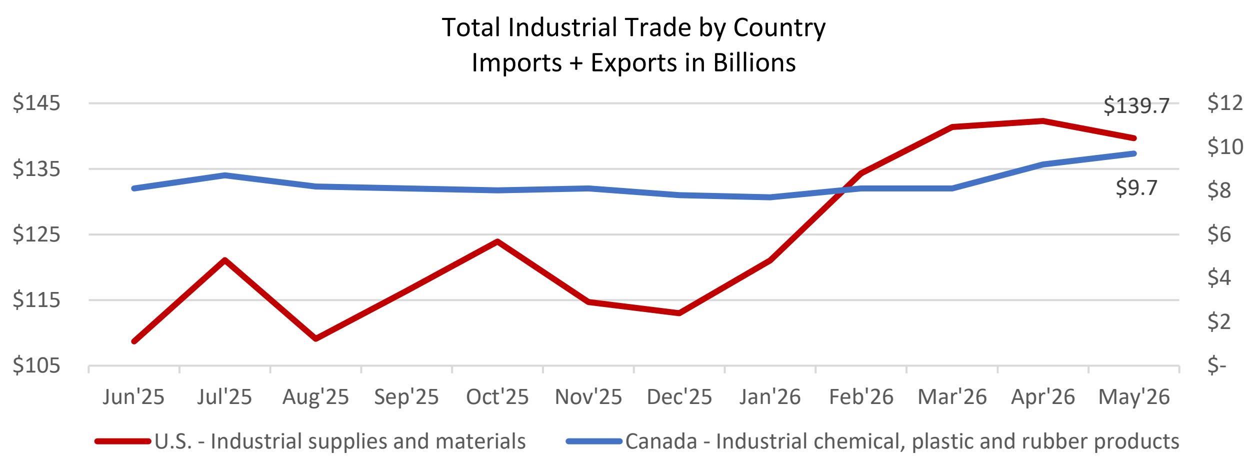
- June’s S&P Global Sector data indicated sustained growth in business activity across the basic materials and industrial sectors, marking the sixth consecutive month of expansion for basic materials and eighth for industrials.

- Both sectors continued to expand at solid rates during June, although the industrial sector's rate of growth eased to its slowest since October 2025.

- Basic Materials saw the strongest rate of output expansion in June. Production has increased in each month since March and the latest upturn was the steepest in four years.

- The industrial sector lost some momentum, as business activity expanded at the weakest rate since October 2025.

Total Trade Volume



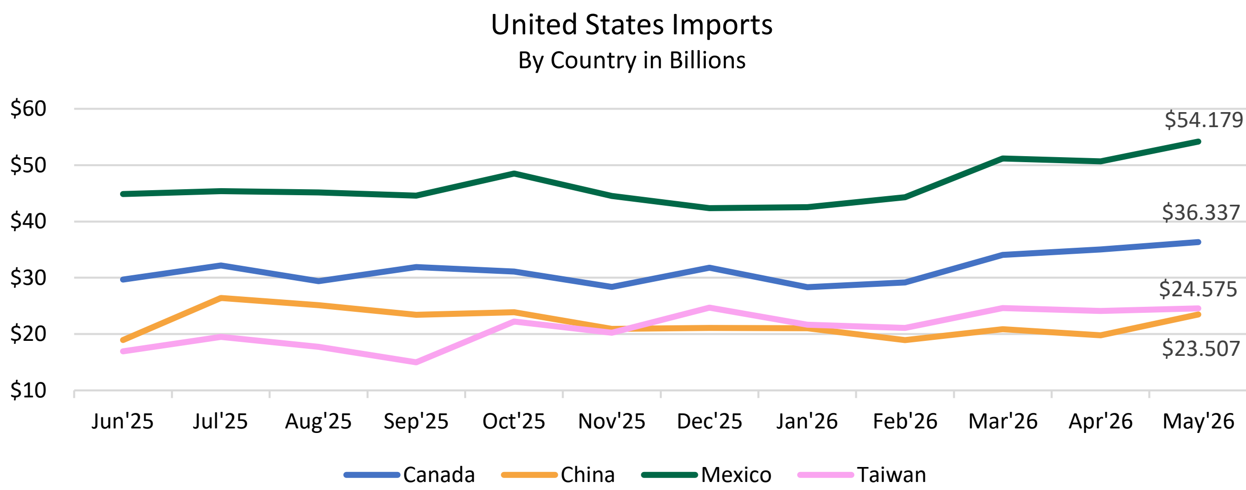
Key Takeaways:

- Combining both imports and exports provides insight 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.

- U.S. trade in goods increased by $1.4 billion in May, driven by a $12.3 billion rise in imports. Of that increase, $3.1 billion was attributable to industrial supplies and materials. Meanwhile, goods exports declined by $11.3 billion, with the industrial supplies and materials sector accounting for $5.5 billion of the decrease.

- Canada's total merchandise trade increased by $2.4 billion in April, as exports rose 0.9% while imports declined 0.2%. Within the industrial chemicals, plastics, and rubber products sector, imports increased 3.8%, while exports rose 5.6% over the month.

Total U.S. Imports By Country



Key Takeaways:

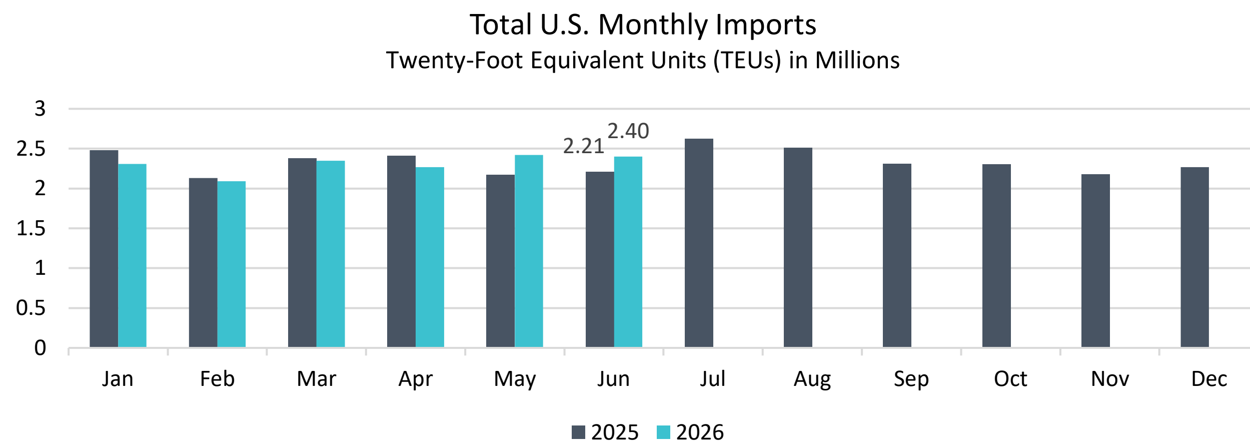
- Imports from Mexico reached over $54 billion in May, another MoM increase and the highest among all U.S. trading partners. Mexico continues to benefit from ongoing nearshoring efforts as manufacturers shift production closer to North America to improve supply chain resilience, shorten lead times, and reduce exposure to trans-Pacific shipping risks. Automotive manufacturing, electronics, industrial equipment, and machinery remain major contributors to this growth, supported by integrated North American production networks.

- U.S. imports from Canada increased in May to the highest monthly level of 2026, reflecting continued strength in North American supply chains. Canada remains the United States' second-largest trading partner, with energy, automotive components, industrial materials, and metals continuing to underpin trade volumes despite an increasingly uncertain policy environment.

- U.S. imports from China rebounded in May, reaching their highest monthly level since September 2025. Although imports remain well below 2025 levels, the increase suggests businesses may be rebuilding inventories as supply chains continue to adjust to earlier tariff disruptions. While China has lost its historical position as the leading U.S. trading partner, its manufacturing scale, extensive supplier network, and competitive pricing continue to make it a critical source of industrial goods, particularly as businesses balance cost pressures with ongoing geopolitical uncertainty.

- U.S. imports from Taiwan once again surpassed imports from China, highlighting Taiwan's growing role within global technology and advanced manufacturing supply chains. Taiwan has also benefited from ongoing supply chain diversification as companies reduce dependence on mainland China while maintaining access to highly sophisticated manufacturing capabilities.

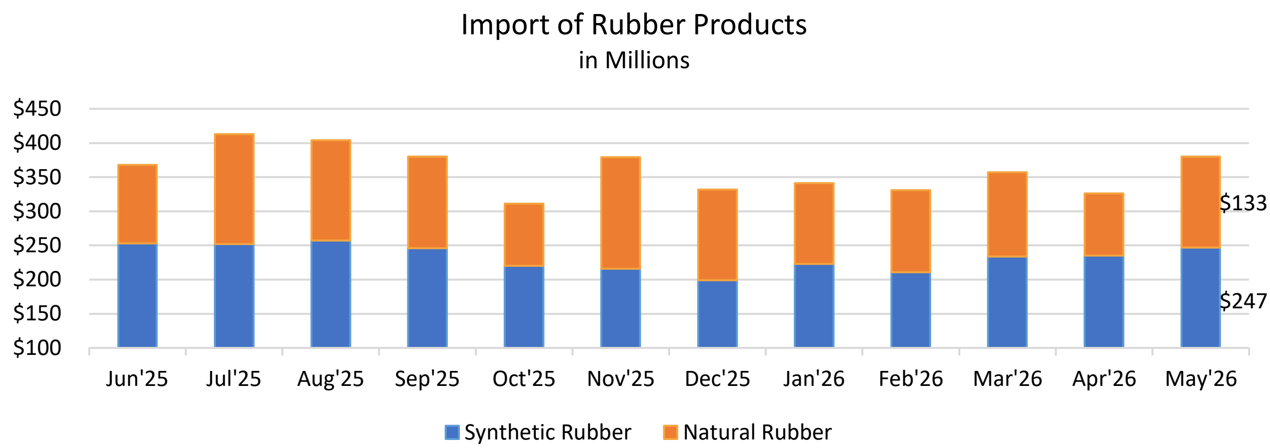
Total U.S. Container Imports

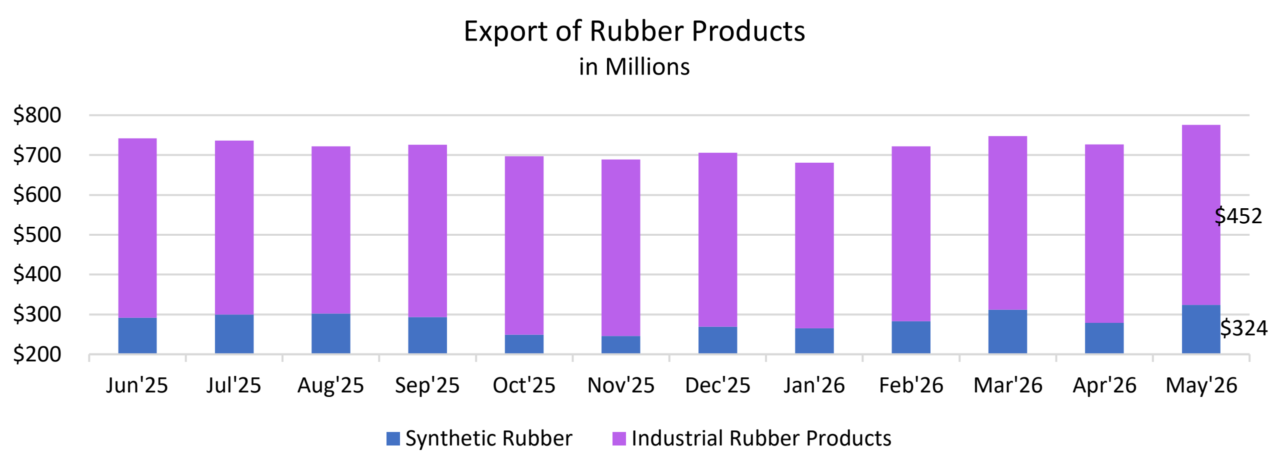


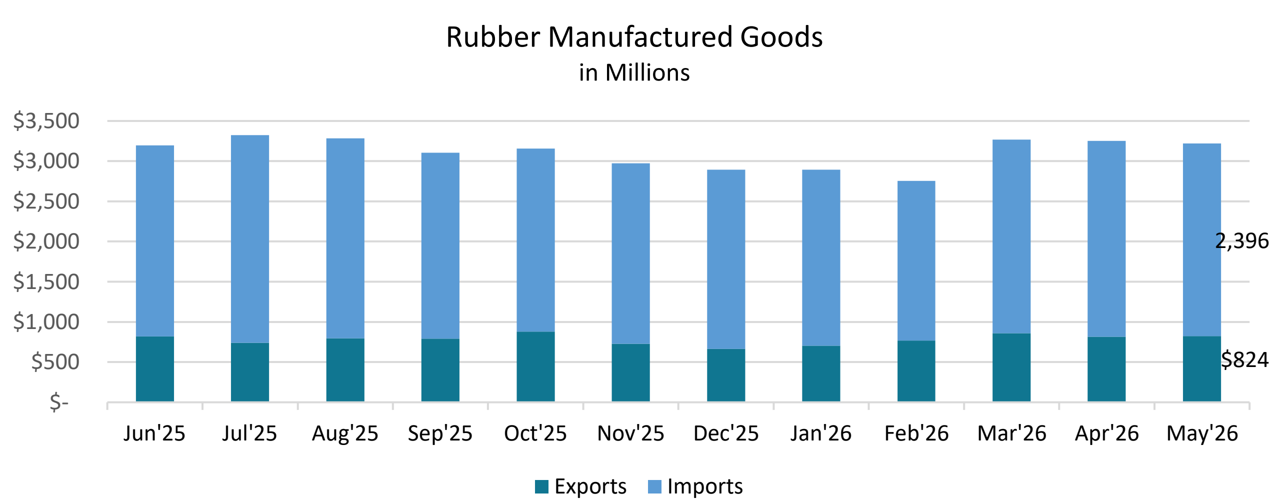
Key Takeaways:

- U.S. containerized imports remained stable in June, totaling 2.4 million twenty-foot equivalent units (TEUs).
- Volumes declined 1.2% from May, reflecting the typical seasonal easing, but were still 8.2% higher than June 2025.
- China-origin imports held steady following May’s rebound, totaling 814,474 TEUs in June. Volumes dipped just 0.2% MoM and increased 27.4% YoY.
- China’s share of total U.S. containerized imports rose to 33.9%, up slightly from May’s 33.6% and well above June 2025’s 28.8%.
- China's imports were led by plastics, underscoring the continued importance of Chinese industrial goods in North American supply chains.
- Through the first half of 2026, imports were nearly flat YoY, down just 0.3% but remained 22.2% above the same period in pre-pandemic 2019.

U.S. Rubber Import & Export Stats







U.S. Industry Import Index

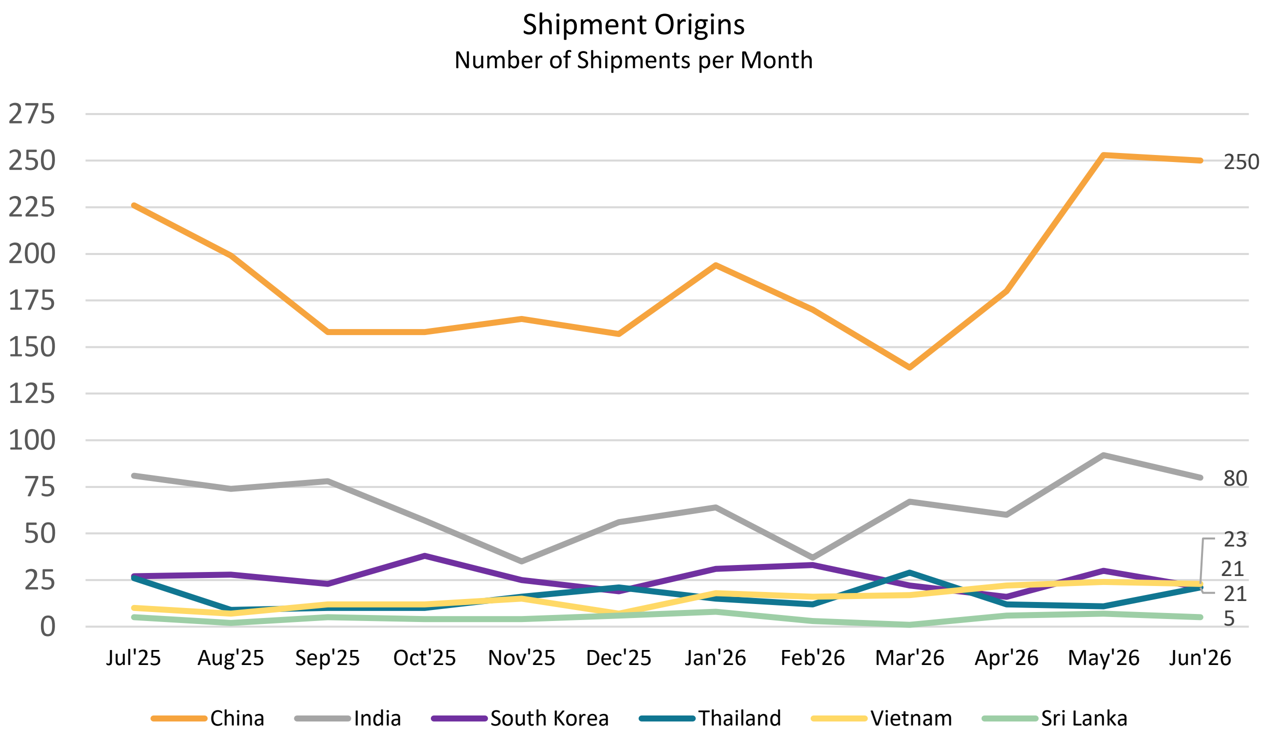
Institute for Supply Management (ISM®) Import Index						
Month	Percent Reporting	% Higher	% Same	% Lower	Net	Index
Jun 2026	86%	12.5	80.7	6.8	+5.7	52.9
May 2026	85%	15.4	75.2	9.4	+6.0	53.0
Apr 2026	85%	10.6	79.3	10.1	+0.5	50.3
Mar 2026	87%	15.1	75	9.9	+5.2	52.6
Feb 2026	87%	15.8	78.1	6.1	+9.7	54.9
Jan 2026	85%	11.3	77.4	11.3	+0.0	50.0
Dec 2025	84%	9.5	70.1	20.4	-10.9	44.6
Nov 2025	84%	13.4	71.0	15.6	-2.2	48.9
Oct 2025	84%	10.4	69.9	19.7	-9.3	45.4
Sep 2025	84%	9.9	69.6	20.5	-10.6	44.7

Index over 50 means imports are increasing	
Index under 50 means imports are decreasing	

Key Takeaways:

- In June, the index remained relatively flat, decreasing 0.1 percentage point to 52.9% and remaining in expansion territory for the sixth consecutive month.
- The 10 industries that reported higher imports in June are: Wood Products; Textile Mills; Primary Metals; Machinery; Computer & Electronic Products; Electrical Equipment, Appliances & Components; Fabricated Metal Products; Food, Beverage & Tobacco Products; Chemical Products; and Transportation Equipment.
- The two industries that reported lower volumes in June are Printing & Related Support Activities and Paper Products.
- Six industries reported unchanged imports in June compared to the previous month, including **Plastics & Rubber Products**, which saw no change for the fifth consecutive month.

U.S. Sheet Rubber Imports By Country



Key Takeaways:

- U.S. imports of Chinese sheet rubber remained exceptionally strong in June, easing only slightly from 253 containers in May to 250. Despite the modest decline, volumes remained near a twelve-month high, reinforcing China's position as the dominant supplier to the U.S. market. The stability following May's sharp surge suggests demand has normalized at an elevated level, highlighting China's continued scale, manufacturing capacity, and central role within global sheet rubber supply chains.

- U.S. imports of Indian sheet rubber declined from 92 containers in May to 80 in June, though volumes remained well above the monthly average observed earlier in the year. India continued to hold a firm second-place position behind China and remained the leading diversification alternative for U.S. buyers. The relatively elevated import levels suggest sourcing diversification remains an active strategy, even as China continues to command the largest share of the market.

- China and India's combined share of U.S. sheet rubber imports remained essentially flat month over month, slipping only 0.1 percentage point to 63.9%.

Port Operations

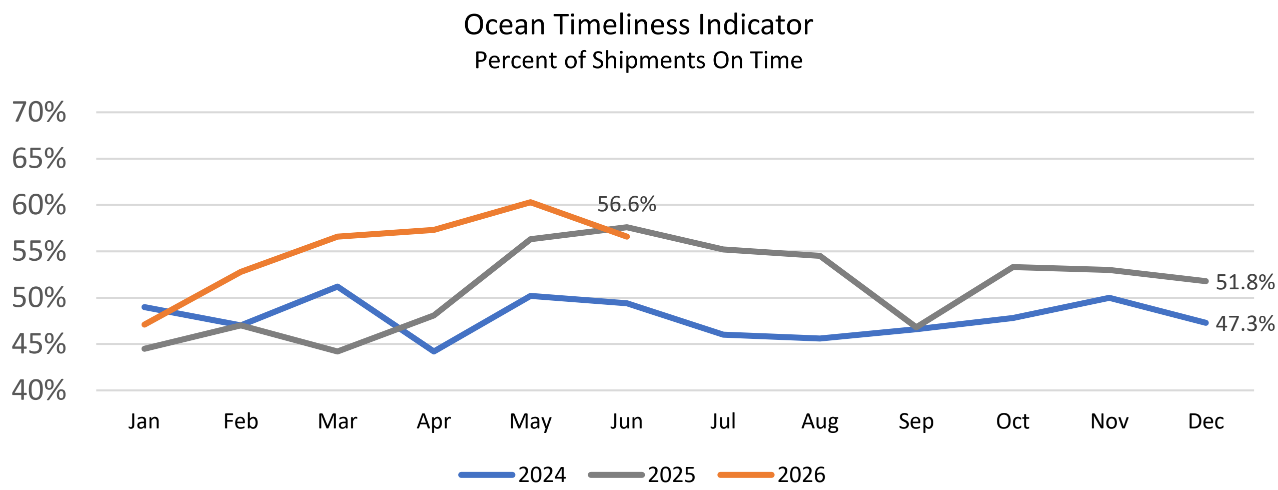
Current North America Vessel Dwell Times				
Region	**Port**	**Vessels Waiting**	**Average Wait for Berth**	**Rail Dwell Times**
U.S. West Coast	LA/LB	**1**	**0 days**	**7 days**
	OAK	**6**	**0 days**	**5 days**
	SEA/TAC	**0**	**0 days**	**4 days**
Canada West Coast	Van	**3**	**2 days**	**5 days**
	PRR	**4**	**1 day**	**4 days**
U.S. East Coast / Gulf Coast	NY/NJ	**2**	**0 days**	**3 days**
	BAL	**6**	**0 days**	**8 days**
	NOR	**5**	**0 days**	**3 days**
	CHS	**3**	**1 day**	**4 days**
	SAV	**7**	**1 day**	**2 days**
	HOU	**1**	**3 days**	**7 days**

Improving over last month	Consistent over last month	Deteriorating over last month

Key Takeaways:

- In China, port congestion remains elevated following Typhoon Bavi, with the most severe impacts seen in Shanghai and Ningbo.
- Shanghai continues to experience significant vessel delays and schedule disruptions after prolonged terminal closures, while Ningbo remains under pressure from vessel backlogs, high yard utilization, and carrier schedule adjustments.
- In the U.S., recent transit times suggest improving conditions across East and Gulf Coast gateways, while West Coast delays increased modestly, led by a sharper rise at Los Angeles.
- In Canada, the wildfires in Northern Ontario continue to disrupt rail operations, affecting intermodal freight movements between Toronto and Western Canada.
- Overall, there have been no reports of the wildfires directly affecting North American port operations, although rail-related cargo delays are expected to continue.

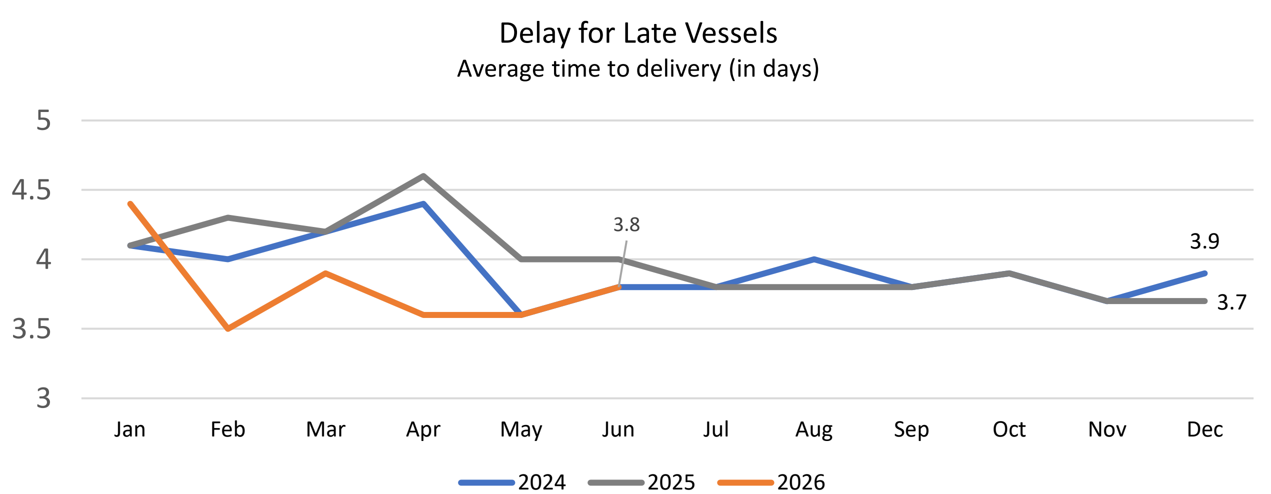
Global Ocean Freight Schedule Reliability



Key Takeaways:

- Global on-time performance fell to 56.6% in June, down 3.7 percentage points month-on-month and 2.3 percentage points below June 2025, marking the first significant month-on-month decline of 2026 following three months of improving reliability.

- Trade reliability weakened across most major trade lanes in June, Asia-North America West Coast services fell 8.4 percentage points to 62.5%, while Asia-North America East Coast services declined 4.5 percentage points to 63.0%.

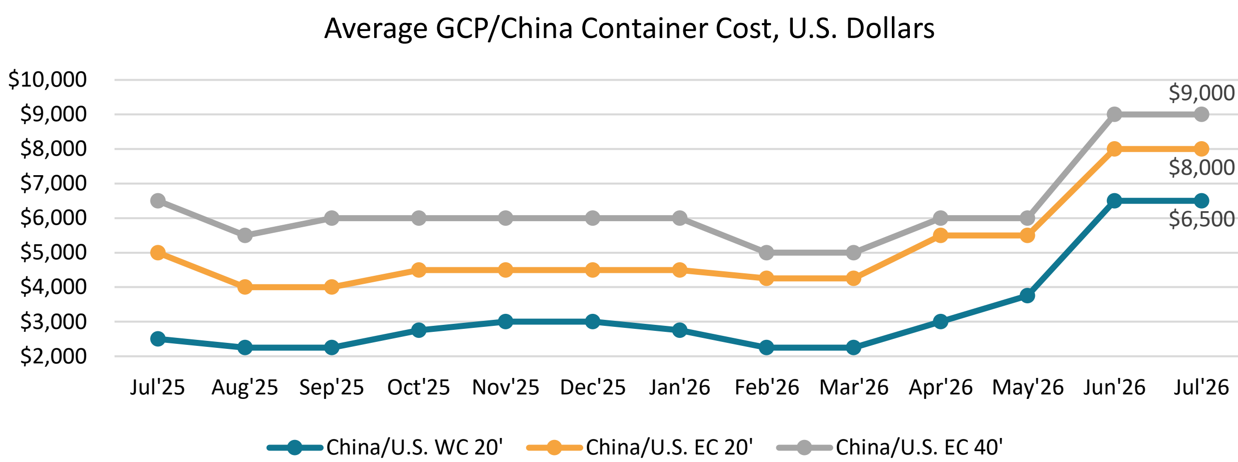


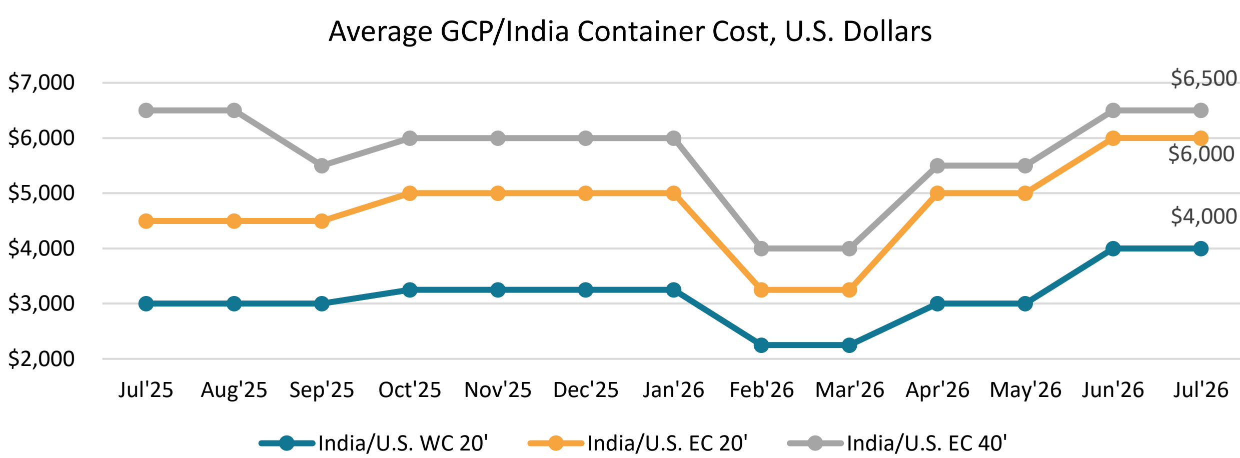
Key Takeaways:

- The average delay for late vessels increased to 3.8 days as reliability weakened across most major trade lanes.

Ocean Freight Rates

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





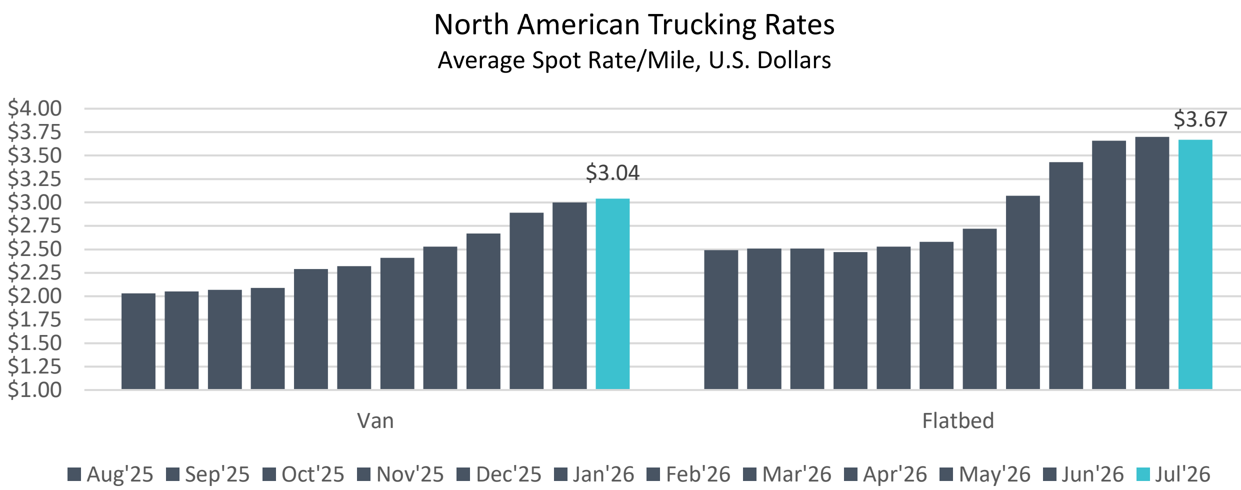
Key Takeaways:

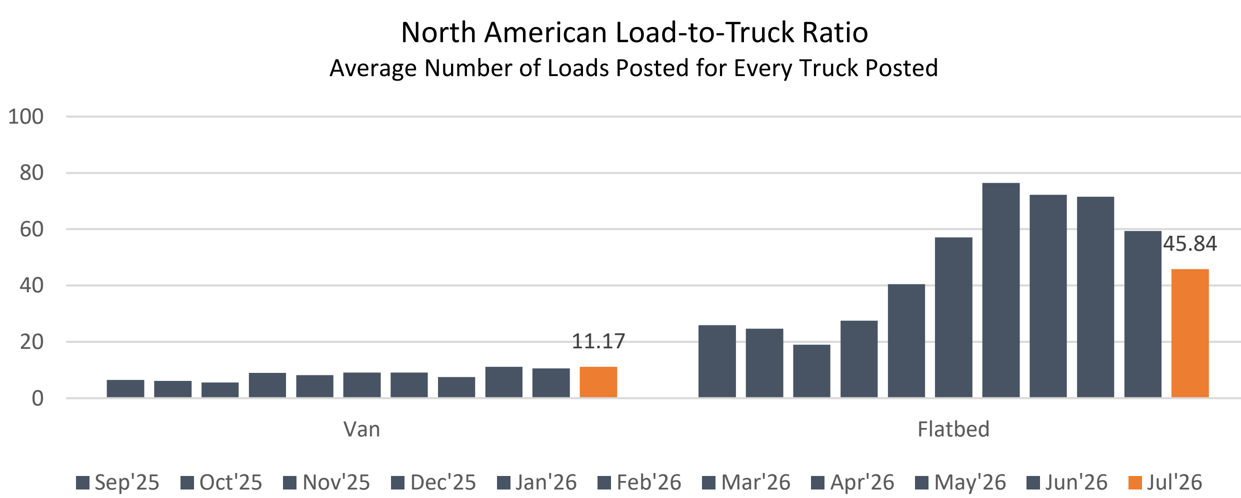
- Global container freight rates have risen for multiple weeks in a row, driven by an early and compressed peak season plus tightening capacity. Spot rates on Asia-U.S. West Coast lanes have risen roughly 75% since May; Asia-U.S. East Coast rates are up about 50% over the same period.

- The renewed military conflict between the U.S. and Iran has closed the Strait of Hormuz to normal commercial transit since July 10. Transits are down approximately 60%, with about 200,000 TEUs of container capacity restricted or trapped in the region.

- Port congestion has also added to the cost pressure. Close to 11% of the global container fleet sat at anchor awaiting a berth in late June, the most since 2022.

Truckload Shipping

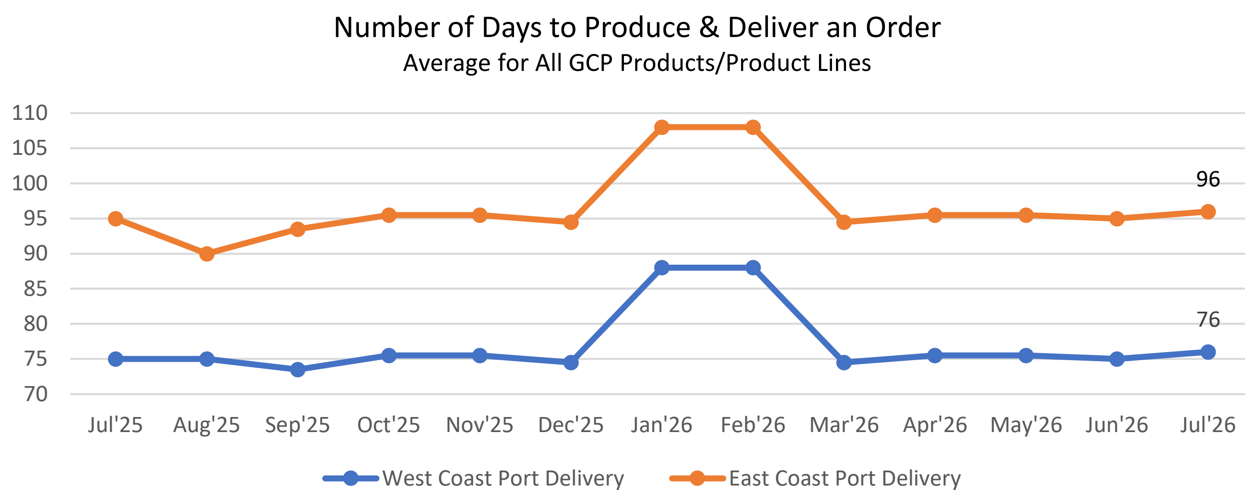




Key Takeaways:

- Truckload rates reached multi-year highs following elevated market activity from the end-of-quarter push and into July.
- Declining driver availability amid ongoing regulatory pressure continues to intensify structural capacity challenges and support a higher-for-longer rate environment.
- Aside from a brief disruption around Labor Day, the calendar is now clear of significant seasonal events until Thanksgiving. Seasonal volatility is therefore expected to remain relatively limited, though a meaningful demand spike or intensifying regulatory action could disrupt the already tight supply environment.

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 2026 production index. (View here)
- GCP production times in July are up slightly MoM but remained broadly in line with production performance seen throughout most of the last calendar year.

Resources

Tariffs Roundup
- https://www.barrons.com/articles/trump-new-tariffs-what-to-expect-504ddd85
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