

Industrial Trade Report

By GCP Industrial Products

Report Highlights

- Raw materials prices increased for the 11th straight month in August (though at a slower rate compared to July).
- Global economic expansion accelerated in August, reaching its fastest pace in 14 months, driven by improved growth in manufacturing production.
- The basic materials was the worst-performing sector in August, as it faced the fastest rise in selling prices among all sectors, driving up downstream input costs.
- U.S. export of industrial supplies and materials stayed mostly flat -0.39% month-over-month (MoM) in August, while imports jumped a significant 25.8%, reversing the trend from the three previous months.
- U.S. imports from China surged nearly 40% MoM. This sharp rebound likely reflects the ease in geopolitical tensions and tariff trade truce.
- Following a near-record peak this summer, import cargo volume at the nation's major container ports is expected to steadily decline for the remainder of the year amid rising tariffs.
- Due to Typhoon Ragasa all container ports in Hong Kong and southern China were closed Sept 22-25. The damage and backlog are expected to create several days to a week of delays at the major ports in the region.
- To manage the slowdown and prevent further ocean shipping rate erosion, carriers are implementing blank sailings and General Rate Increases (GRIs).
- Seasonal slowdowns in trucking activity contributed to further declines in average spot rates, while contract rates remained largely flat. Overall, pricing remains near historic lows.

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U.S. Tariffs on China & India

China

- The U.S./China continue their tariff truce/suspension of escalation through November 10, 2025.
- The additional 90-day pause means the U.S. will maintain a residual 10 % “reciprocal” tariff in place, plus other pre-existing duties (such as Section 301, Section 232 and fentanyl-related tariffs).
- U.S. and China met in Madrid mid-September for their fourth round of talks. The two sides discussed economic and trade issues, including the U.S. unilateral tariff measures, the abuse of export controls and TikTok.
- Treasury Secretary Scott Bessent and Jamieson Greer, the U.S. trade representative, lead the negotiations on behalf of the U.S., and He Lifeng, the vice premier for economic policy, lead the talks for China.
- Chinese Premier Li Qiang told a group of American business executives Thursday that the U.S. and his country need “to work in the same direction” to further what he called “the most important bilateral partnership in the world.”
- All recent negotiations are likely paving the way for President Trump and President Xi to meet next month at the Asia-Pacific Economic Cooperation forum in South Korea. Trump has also suggested that he may visit China at some point at Mr. Xi’s invitation.

India

- From September 22–24, an Indian delegation led by Commerce & Industry Minister Piyush Goyal met with U.S. Trade Representative Jamieson Greer and other U.S. officials in Washington. The talks were described as “constructive.”
- Key topics in the India/U.S. discussions included reducing the 25% additional U.S. tariff imposed in response to India’s continued purchases of Russian oil, which is one of the major friction points.
- Indian exporters of textile, gems and jewelry and marine products have been among the most affected by the increased tariffs.
- Most recently, President Trump has decided to impose 100% tariffs on patented, branded drugs being imported into the U.S. The expected impact to India is limited as most Indian drugmakers sell generic pharmaceutical drugs to the U.S.

Raw Material Pricing

Institute for Supply Management (IMS®) Price Index					
Month	Prices Higher	Prices Same	Prices Lower	Net	Index
Aug 2025	33.5%	60.4%	6.1%	+27.4	63.7
July 2025	35.4%	58.8%	5.8%	+29.6	64.8
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
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:

- In August, the Prices Index fell by 1.1 percentage points to 63.7%, indicating that raw material prices rose for the 11th consecutive month, albeit at a slower pace than in July.
- All six of the largest manufacturing industries: Machinery; Food, Beverage & Tobacco Products; Computer & Electronic Products; Petroleum & Coal Products; reported price increases in August.
- The Index continues to be driven by rising steel and aluminum prices, which affect numerous supply chains, along with the impact of applied tariffs on many imported goods.
- In August, 15 of the 18 industries reported paying increased prices for raw materials, in order, they are: Textile Mills; Wood Products; Primary Metals; Electrical Equipment, Appliances & Components; Nonmetallic Mineral Products; Miscellaneous Manufacturing; Machinery; Paper Products; Food, Beverage & Tobacco Products; Computer & Electronic Products; Petroleum & Coal Products; Transportation Equipment; Furniture & Related Products; Fabricated Metal Products; and Chemical Products. No industries reported paying decreased prices for raw materials in August.

Commodity Pricing

IMS® Commodity Price Change		IMS® Commodities in Short Supply
Prices Up	Prices Down	Electrical Components (2) Electronic Components (6)
Aluminum (21) Brass Copper (2) Copper Products (2) Electrical Components (7) Steel* (7) Steel - Stainless (6) Steel Products* (6)	Corn (2) Natural Gas (2) Plastic Resins Soybean Meal (2) Steel* Steel Products*	<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 continue to hover around 170 US cents per kilogram. Weaker-than-expected economic data from China has dampened market sentiment and clouded the demand outlook. With supply still outpacing demand, prices are likely to remain under pressure in the near term, with volatility persisting until industrial demand shows clearer signs of recovery.

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.

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

Key Takeaways:

- Global economic expansion accelerated in August, reaching its fastest pace in 14 months, driven by improved growth in manufacturing production.
- While demand and output conditions improved in August, cost pressures also intensified. Average input prices across goods rose at the fastest pace in three months.
- Business leader's expectations for growth in the year ahead continued to decline, reaching their lowest level since the early months of the pandemic.

Global Sectors Heatmap

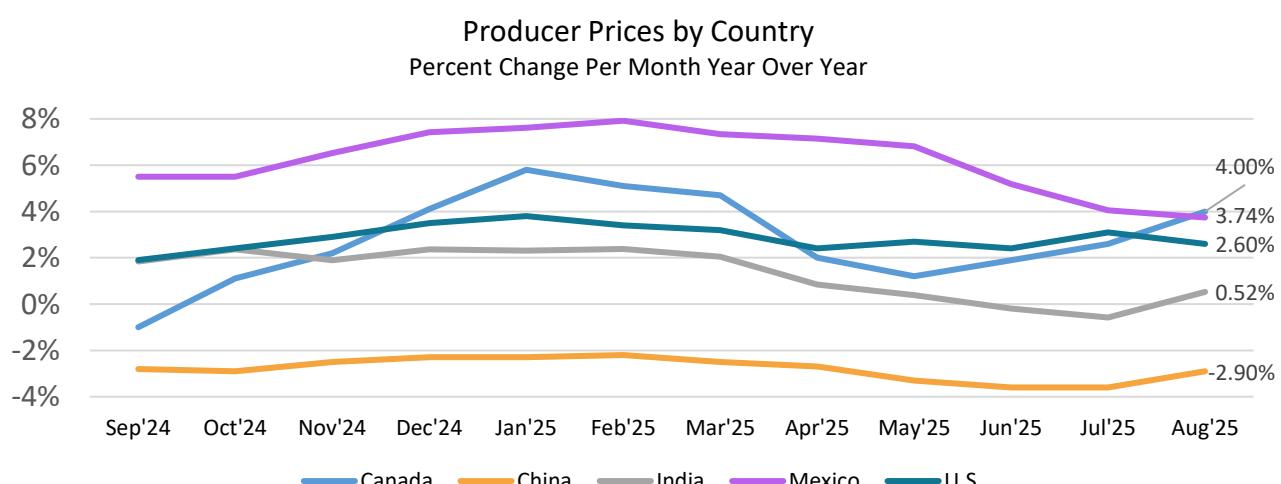
	Sept 24	Oct 24	Nov 24	Dec 24	Jan 25	Feb 25	Mar 25	Apr 25	May 25	Jun 25	Jul 25	Aug 25
Basic Materials	Orange	Light Orange	Orange	Orange	Light Orange	Green	Orange	Orange	Orange	Light Orange	Orange	Light Orange
Chemicals	Light Orange	Light Orange	Green	Orange	Green	Orange	Orange	Orange	Orange	Green	Orange	Light Orange
Resources	Light Orange	Light Orange	Orange	Orange	Light Orange	Orange	Orange	Orange	Orange	Light Orange	Light Orange	Light Orange
Forestry & Paper Products	Light Orange	Green	Light Green	Orange	Green	Orange	Orange	Green	Orange	Green	Green	Light Green
Metals & Mining	Light Orange	Light Orange	Orange	Orange	Light Orange	Light Orange	Orange	Orange	Orange	Light Orange	Orange	Light Orange
Industrials	Light Green	Green	Light Green	Green	Light Green	Light Green	Green	Green	Green	Green	Green	Green
Industrial Goods	Green	Orange	Green	Orange	Light Orange	Green	Light Green	Green	Light Green	Green	Orange	Green
Machinery & Equipment	Green	Light Green	Green	Orange	Light Orange	Green	Light Green	Green	Light Green	Green	Orange	Green
Construction Materials	Orange	Orange	Light Orange	Light Orange	Light Orange	Green	Orange	Orange	Orange	Light Orange	Orange	Light Orange
General Industrials	Orange	Green	Green	Orange	Orange	Green	Light Green	Orange	Light Orange	Green	Green	Green
Transportation	Light Green	Green	Light Green	Green	Light Green	Orange	Green	Light Green	Green	Green	Green	Light Green

Improving at a faster rate	Green	Deteriorating at a slower rate	Light Orange	At a neutral 50.0 mark	Grey
Improving at a slower rate	Light Green	Deteriorating at a faster rate	Orange		

Key Takeaways:

- The basic materials was the worst-performing sector in August, as it faced the fastest rise in selling prices among all sectors, driving up downstream input costs.
- In contrast, the industrials sector was among the better performers, benefiting from improved manufacturing momentum as some companies accelerated orders or increased capital investment to address supply uncertainty and mitigate tariff risks.

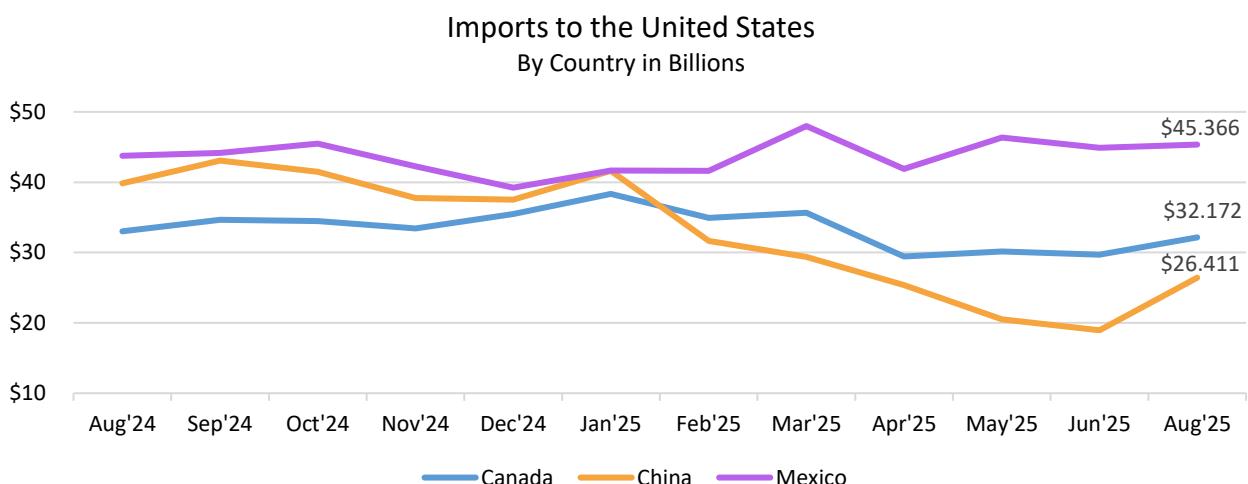
Producer Prices by Country



Key Takeaways:

- U.S. producer prices unexpectedly declined in August but remain 2.6% higher than a year ago. This reflects persistent, but moderating, inflation amid weakening demand and the likelihood of some companies choosing to absorb cost pressures rather than fully passing them on.
- China's producer prices fell -2.9% year-over-year (YoY) in August, marking the mildest decline since April. This reflects Beijing's recent efforts to curb corporate price wars. However, the result also extended factory-gate deflation to 35 consecutive months, driven by continued weakness in domestic demand and persistent trade headwinds.
- India's wholesale price inflation increased 0.52% YoY, recovering from a -0.58% decline in July, which was the sharpest drop since July 2023. This marked the highest wholesale inflation since April, primarily driven by faster growth in manufacturing costs.

Imports to the United States



Key Takeaways:

- Canadian exports to the U.S. posted a modest increase in July, however, overall trade flows remain constrained due to a combination of new U.S. tariffs on select Canadian goods.
- U.S. imports from China surged in July 2025, with values rising nearly 40% MoM. This sharp rebound likely reflects front-loading by importers taking advantage of the ease in geopolitical tensions. Additionally, improving port conditions and easing shipping bottlenecks, allowed for faster delivery of backlogged orders, contributing to the spike.
- For Mexico, U.S. imports continued to show strength as supply chains increasingly regionalize and importers shift supply away from Asia toward Mexico to mitigate tariff risks.

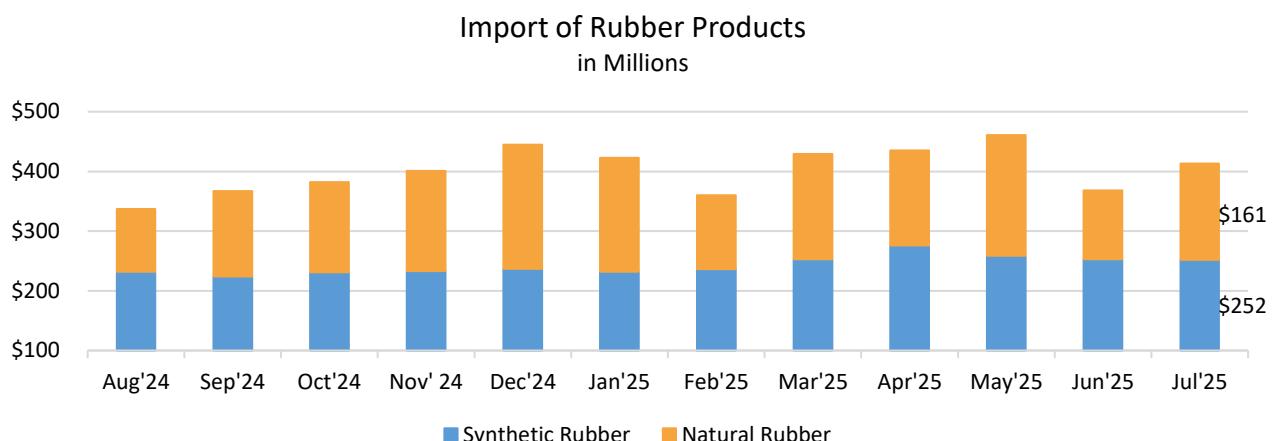
Total Trade Volume



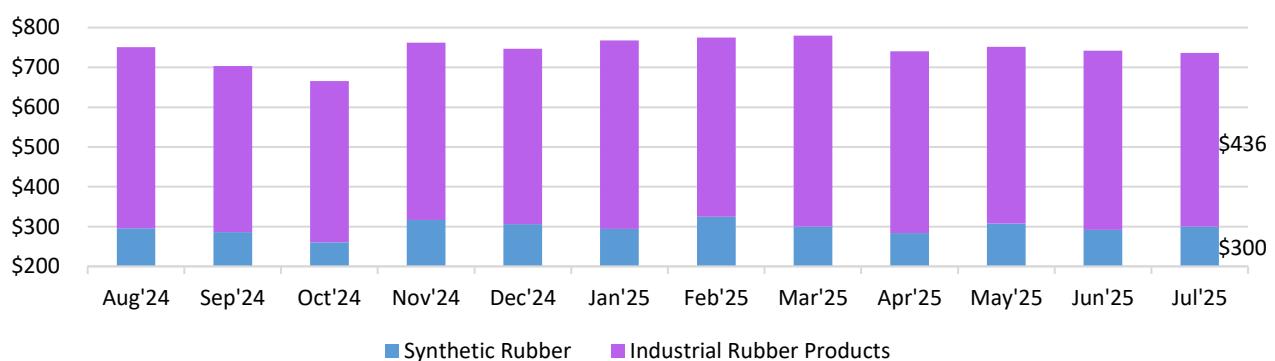
Key Takeaways:

- 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 stayed mostly flat -0.39% MoM, while imports jumped a significant 25.8%, reversing the trend from the three previous months.
- In Canada, exports of the industrial chemical, plastic and rubber products sector, grew 3.8% MoM while imports also rose slightly at 1.1% for the month.

U.S. Rubber Import & Export Stats



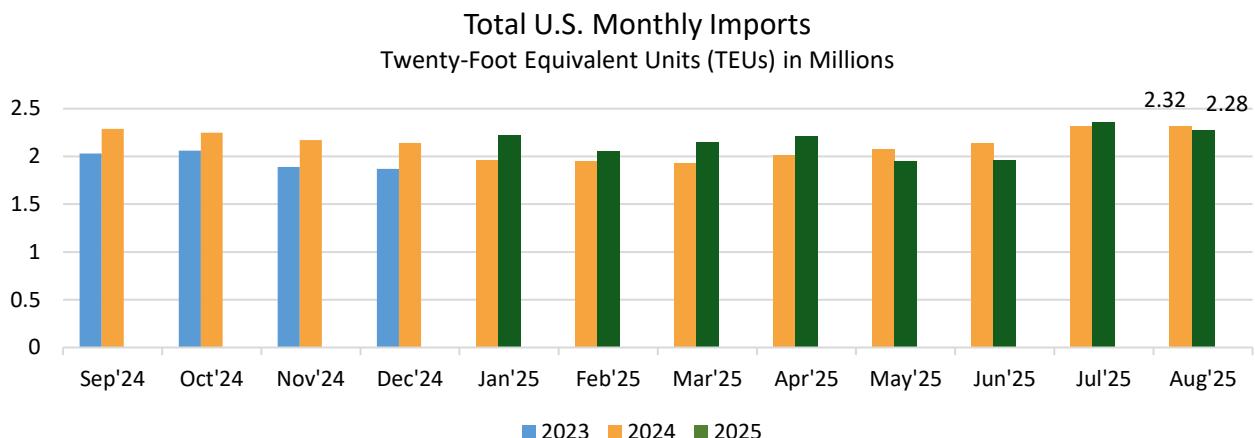
Export of Rubber Products
in Millions



Rubber Manufactured Goods
in Millions



Monthly U.S. Imports

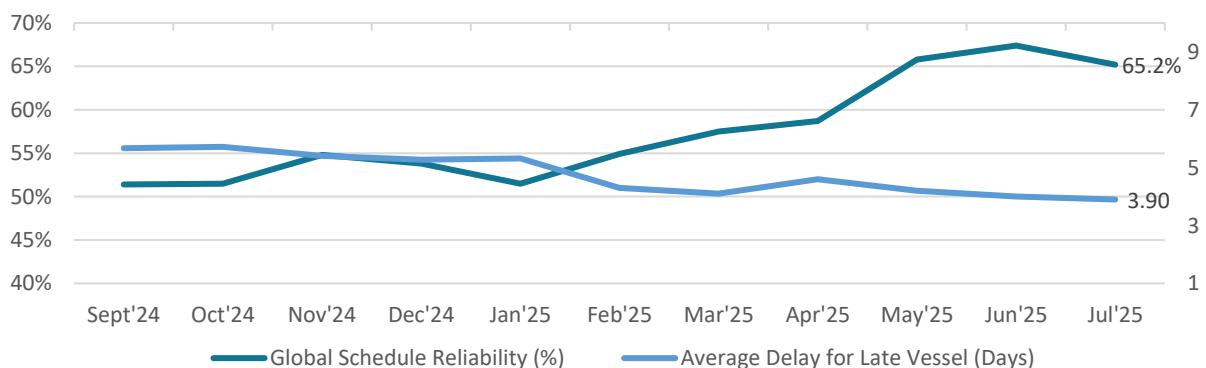


Key Takeaways:

- In July, U.S. ports processed 2.28 million TEUs, down -1.7% YoY, but higher than that 2.2 million TEUs expected before the postponement of China tariffs and the new tariffs on India and Brazil.
- Following a near-record peak this summer, import cargo volume at the nation's major container ports is expected to steadily decline for the remainder of the year amid rising tariffs.

Global Ocean Schedule Reliability

Global Ocean Liner Performance



Key Takeaways:

- Global ocean schedule reliability (measuring 60+ carriers) declined MoM for the first time since January 2025, dropping by -2.2%. On a YoY level, schedule reliability was up by 13%. Additionally, the average arrival delay of late vessels remained steady at 3.9 days, indicating that late vessel times were continuing to improve.

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	6 days
	OAK	2	0 days	7 days
	SEA/TAC	0	0 days	6 days
Canada West Coast	Van	1	3 day	5 days
	PRR	3	0 days	4 days
U.S. East Coast / Gulf Coast	NY/NJ	4	0 days	3 days
	BAL	9	0 days	3 days
	NOR	5	1 day	3 days
	CHS	4	0 days	4 days
	SAV	3	3 days	2 days
	HOU	0	4 days	9 days

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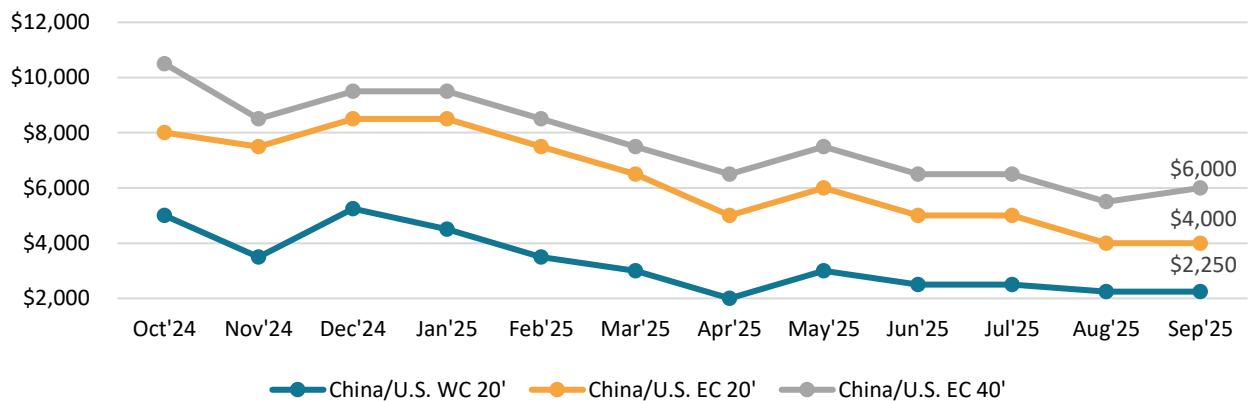
Key Takeaways:

- Import volumes at U.S. ports were down 3.3% from July, a slightly stronger decline than the 3.0% MoM drop recorded in August last year. While consistent with seasonal levels from the past four of the past five years, the latest volumes underscore the sensitivity to tariff timing.
- Importers continue to adjust shipment flows in response to policy deadlines, including the mid-November expiration of the U.S.–China tariff truce and the August 29 repeal of the U.S. de minimis exemption for all countries, which removed duty-free treatment for low-value parcels.
- U.S. containerized imports from China decreased to 869,523 TEUs in August, down 5.8% MoM and 10.8% YoY. China's share of total U.S. imports slipped modestly for the month to 34.5% from July's 35.2%.
- More recently, due to Typhoon Hagibis all container ports and airports in Hong Kong and southern China were closed Sept 22-25.
- The damage and backlog are expected to create several days of delays at the major ports in the region. Vessels at Yantian may possibly be held up as much as a week impacting those still trying to ship orders ahead of the Golden Week holiday in China starting October 1st.

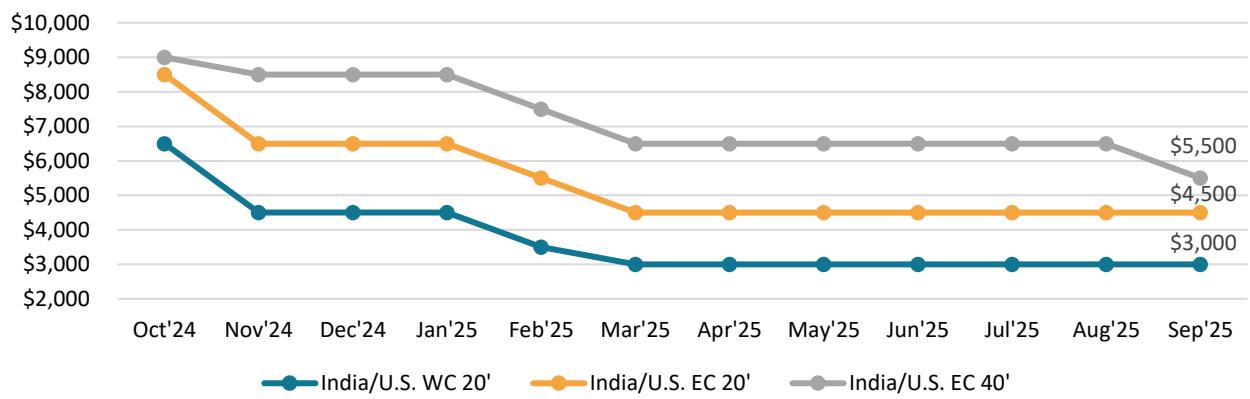
Ocean Freight

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

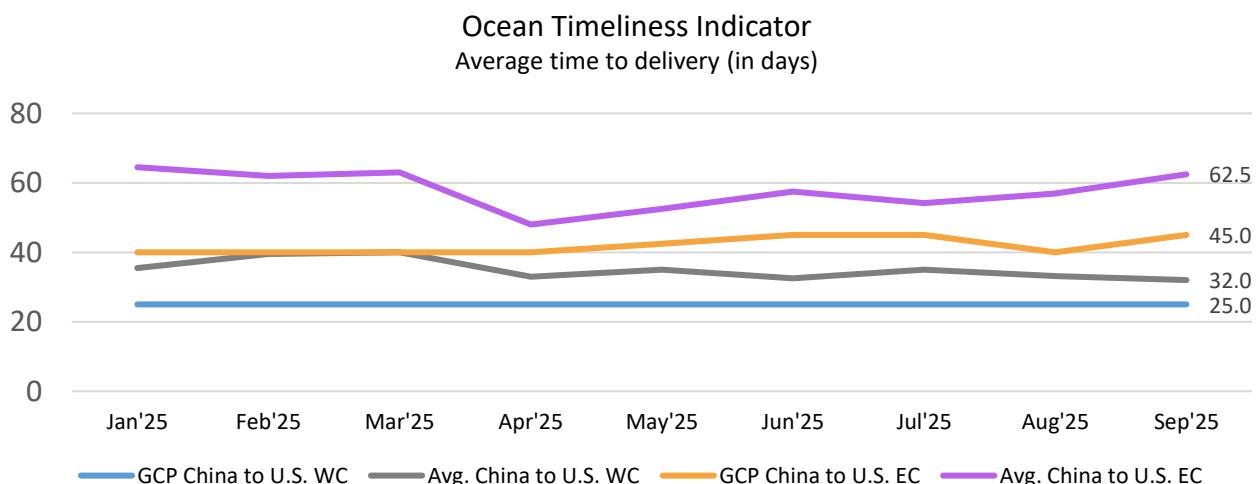


Key Takeaways:

- Earlier this year, the Office of the U.S. Trade Representative (USTR) announced that, effective October 14, 2025, a service fee will be assessed on maritime transport services provided by Chinese operators and shipowners, as well as on services utilizing vessels constructed in China.
- Though the final rules remain unpublished beginning October 14, 2025, U.S. Section 301 port fees on China-linked vessels will begin. These fees will start at \$50 per net ton and be phased in rising to \$140 per net ton by April 2028.
- Most bulk carriers and tankers are exempt from these fees.

- Despite the new fee structure, most ocean carriers have implemented mitigation measures, such as vessel rerouting and other operational adjustments to avoid passing these costs on to customers for now.
- There are already signs of reduced deployment of Chinese-built vessels. On the Trans-Pacific route, their share has declined from 25–30% in the first half of 2025 to 20–25% in recent weeks. A similar, though less pronounced, trend is also evident on the Asia–North America East Coast route.
- In general, the recent 'pull-forward' of shipments has led to a notable decline in demand for new orders. To manage the slowdown and prevent further rate erosion, ocean carriers are implementing blank sailings and General Rate Increases (GRIs).
- In September carriers imposed GRIs ranging from \$ 1,000 to \$ 3,000 per 40-foot container. There are further GRIs planned for October.
- Carriers are seeking to create artificial space shortages through blank sailings and tighter allocations, forcing shippers to pay premium rates or risk delays.

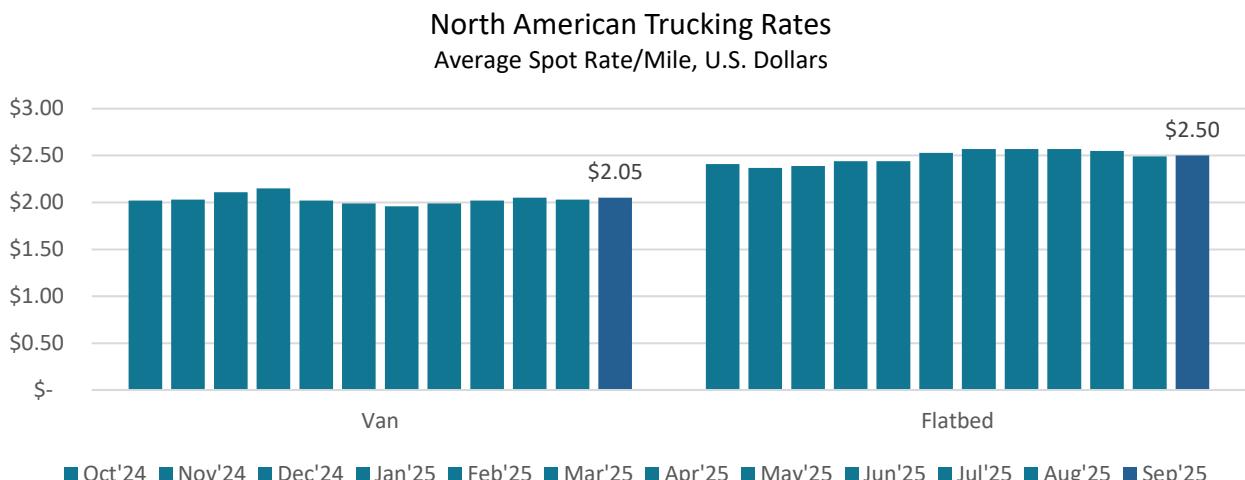
Ocean Timeliness Indicator



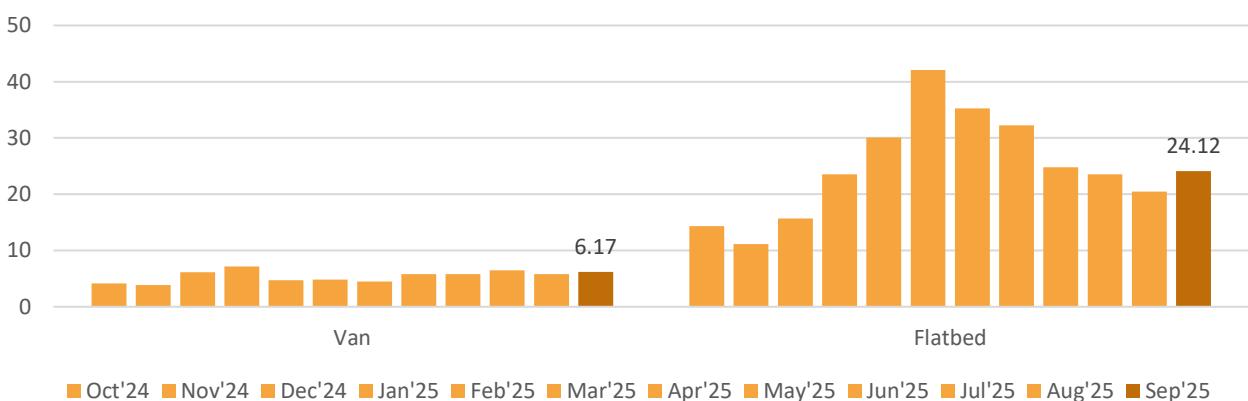
Key Takeaways:

- 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



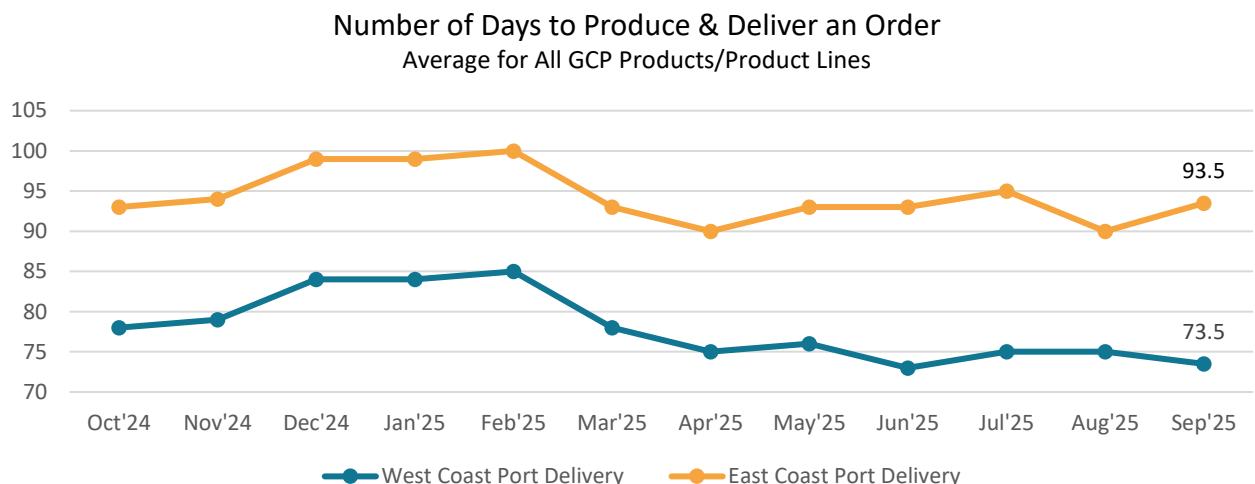
North American Load-to-Truck Ratio
Average Number of Loads Posted for Every Truck Posted



Key Takeaways:

- Seasonal slowdowns in trucking activity contributed to further declines in average spot rates, while contract rates remained largely flat. Overall, pricing remains near historic lows.
- Market conditions have mirrored this stagnation, with overall capacity and demand holding steady for the past several weeks.
- The monthly average for daily tender volumes in August rose 1.8% MoM compared to July, increasing from 9,817.00 to 9,990.29. Compared to August 2024, average daily tender volumes are down 13.7% YoY and 23.9% below the 5-year average.

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

Resources

Tariffs

- <https://www.cnbc.com/2025/09/26/us-pharma-tariffs-investors-of-indias-generic-drugmakers-rattled.html>
- <https://abcnews.go.com/Business/wireStory/chinese-premier-us-country-work-same-direction-125941087>
- <https://www.reuters.com/world/us/us-chinese-officials-meet-treasury-technical-talks-trade-source-says-2025-09-24/>
- <https://www.nytimes.com/2025/09/14/business/us-china-trade-tiktok-negotiations.html>
- <https://www.reuters.com/sustainability/boards-policy-regulation/india-says-trade-talks-with-us-constructive-eyes-early-deal-2025-09-26/>

Raw Material Prices/Commodity Pricing

- <https://www.ismworld.org/supply-management-news-and-reports/reports/ism-pmi-reports/pmi/august>

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-september-2025.html>
- https://cdn.ihsmarkit.com/www/pdf/6078674_6078673_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>

Total Trade Volume

- <https://www150.statcan.gc.ca/n1/daily-quotidien/250904/dq250904a-eng.htm>
- <https://www150.statcan.gc.ca/n1/en/daily-quotidien/250904/dq250904a-eng.pdf?st=rya-kQJd>
- <https://www150.statcan.gc.ca/n1/daily-quotidien/250904/t002a-eng.htm>
- <https://www.bea.gov/news/2025/us-international-trade-goods-and-services-july-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/2025-import-cargo-levels-expected-to-be-down-more-than-5-from-2024-amid-rising-tariffs>

Ocean Schedule Reliability

- <https://mykn.kuehne-nagel.com/news/article/on-time-performance-container-shipping-july25>
- <https://www.sea-intelligence.com/press-room/343-july-global-schedule-reliability-sees-first-m-m-drop-since-jan-2025>

Port Operations

- <https://www.descartes.com/resources/knowledge-center/global-shipping-report-august-us-imports-remain-strong-amid-china-pullback>
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