



INDUSTRIAL TRADE REPORT | FEBRUARY 2026

Adjusting In Real Time

February reveals an industrial marketplace recalibrating in real time. Just as a key policy pillar was struck down, a new global duty was introduced in its place, underscoring how fluid the U.S. policy landscape has become for businesses. Industrial activity is strengthening, with global manufacturing accelerating and new orders improving, yet price pressures continue to build across raw materials and freight. The U.S. dollar remains soft, amplifying import costs even as trade volumes struggle to regain prior momentum. There remains a healthy dose of uncertainty, and those who remain resilient under pressure are often the same ones who adjust under uncertainty. What appears to be a temporary adjustment today could become tomorrow's standard operating environment.

Executive Brief

As volatility moves from headline risk to operating reality, the following points identify where change maybe impacting you. Together, they illustrate how policy, cost, demand, and logistics are interacting in real time altering industrial trade conditions.

- On February 20th, the U.S. Supreme Court struck down the Trump administration's use of the International Emergency Economic Powers Act (IEEPA) to enact tariffs.
- The move has triggered a rapid response from the White House, introducing a 10% global tariff effective February 24th for 150 days.
- According to The ISM® Prices Index raw materials prices increased for the 16th straight month.
- Global natural rubber prices are sitting at \$1.82 U.S. per kilogram, up slightly since the end of 2025.
- The U.S. dollar rebounded from January's lows to reach a one-month high, before pulling back after President Trump's State of the Union address failed to provided clarity on future tariff policy.
- The global economic expansion accelerated to start the year with a notable improvement in the manufacturing sector. Production rose at the highest pace since June 2024.
- For the first time in more than 40 years, the U.S. imported more goods from Taiwan than from China in December 2025.
- In January, U.S. ports processed 2.11 million Twenty-Foot Equivalent Units (TEUs), which is up from December but down 5.2% year-over-year (YoY).
- The U.S. import index moved into growth territory for the first time in 9 months in January.
- China continues to have a strong hold on the top spot for sheet rubber imports into the U.S. with a 43.4% market share in January.
- During the Lunar New Year holiday ocean carriers implemented an aggressive blank sailing programs, removing ~40% of weekly capacity to prevent oversupply and falling rates.
- Van and flatbed truckload spot rates rose sharply in late January as winter storm Fern set in. The rally carried into February; spot rates remain meaningfully elevated YoY.

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Tariffs Roundup

Key Takeaways:

- On February 20th, the U.S. Supreme Court struck down the Trump administration's use of the International Emergency Economic Powers Act (IEEPA) to enact tariffs.
- President Trump relied on IEEPA for most of last year's tariffs, including all the country-specific tariffs and the fentanyl-related duties imposed on China, Mexico and Canada.
- The ruling keeps Section 232 sectoral tariffs and Section 301 tariffs on China unaffected and the U.S. suspension of de minimis also remains intact.
- The move has triggered a rapid response from the White House, introducing a 10% global tariff effective February 24th for 150 days. President Trump then took to social media to threaten to increase that to 15%.
- In terms of refunds, the U.S. Supreme Court did not address the extent to which importers are entitled to refunds, leaving it to the U.S. Court of International Trade (CIT) to sort out those issues.
- Businesses that paid tariffs will likely need to recover money through legal claims, reliquidation, and protests, but the timeline and exact process remain unclear. Legislative efforts to mandate refunds could change the landscape, but success is not guaranteed.
- If fully allowed, refunds could total as much as \$170 billion, more than half the total revenue Trump's tariffs have brought in.

Raw Material Pricing

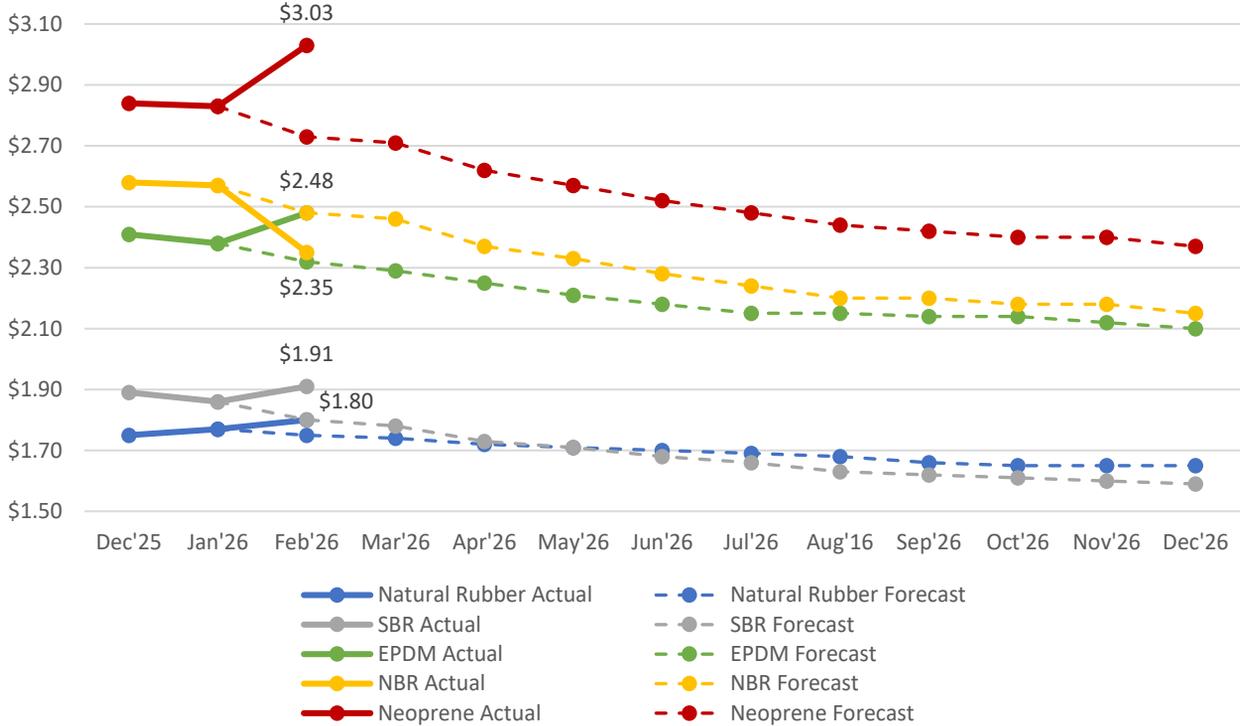
Institute for Supply Management (IMS®) Price Index					
Month	Prices Higher	Prices Same	Prices Lower	Net	Index
Jan 2026	29.0%	59.9%	11.1%	+17.9	59.0
Dec 2025	26.4%	64.1%	9.5%	+16.9	58.5
Nov 2025	27.2%	62.6%	10.2%	+17.0	58.5
Oct 2025	27.3%	61.4%	11.3%	+16.0	58.0
Sep 2025	32.5%	58.8%	8.7%	+23.8	61.9
Aug 2025	33.5%	60.4%	6.1%	+27.4	63.7
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
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:

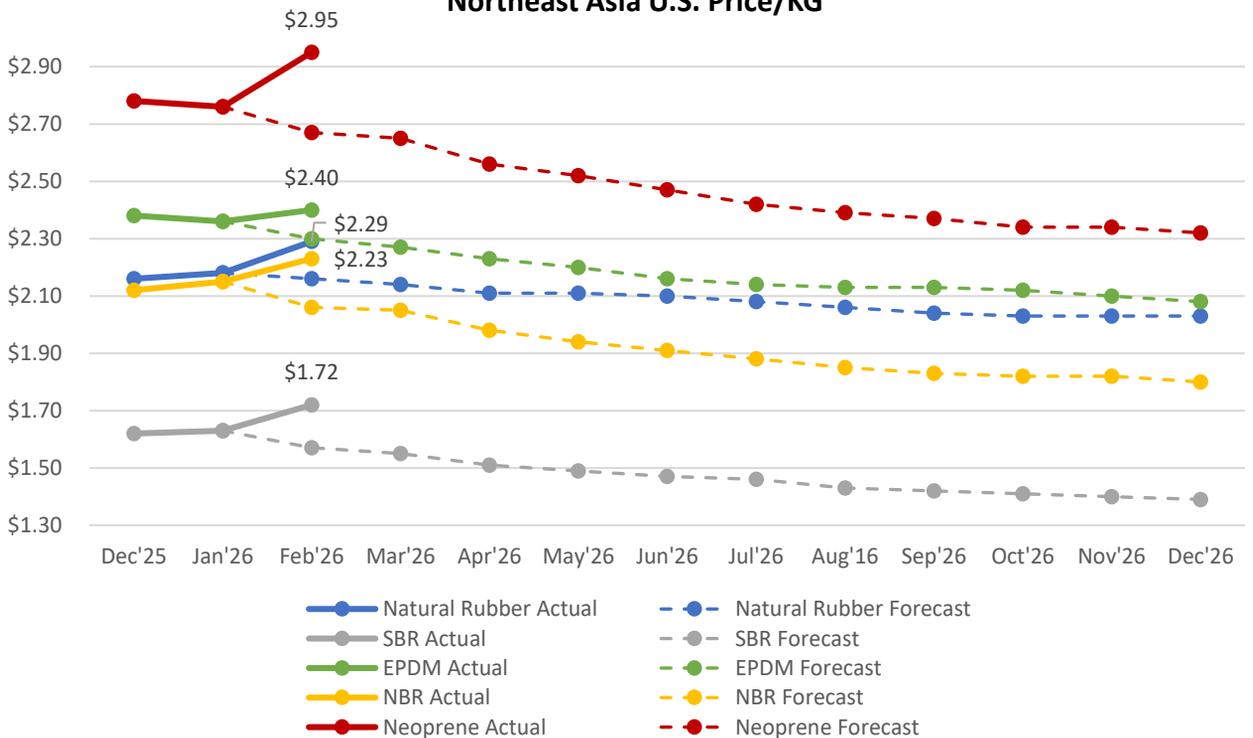
- The ISM® Prices Index registered 59.0% in January, increasing 0.5% from December's reading and indicating raw materials prices increased for the 16th straight month.
- Higher prices were reported by 29% of respondents for the month, up 2.6% from December.
- The index reading continues to be driven by increased steel and aluminum prices that impact the entire value chain, as well as tariffs applied to many imported goods.
- In January, the 11 of 18 industries that reported paying increased prices for raw materials are: Primary Metals; Electrical Equipment, Appliances & Components; Fabricated Metal Products; Nonmetallic Mineral Products; Miscellaneous Manufacturing; Machinery; Computer & Electronic Products; Textile Mills; Wood Products; Transportation Equipment; and Chemical Products.
- The three industries that reported paying decreased prices for raw materials in January are: Petroleum & Coal Products; **Plastics & Rubber Products**; and Food, Beverage & Tobacco Products.

Rubber Pricing

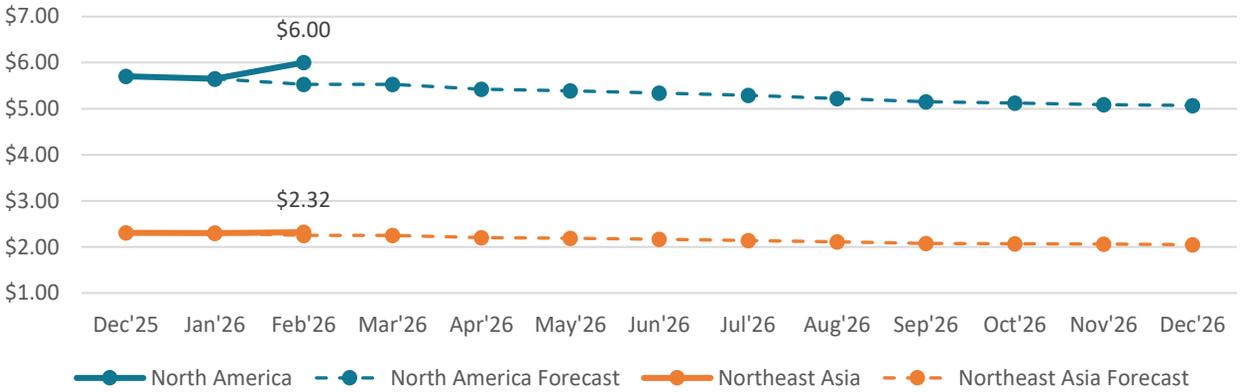
North American U.S. Price/KG



Northeast Asia U.S. Price/KG



Silicone
North American & Northeast Asia U.S. Price/KG



Key Takeaways:

Natural Rubber

North America: US\$1.80/KG, up \$0.03 cents
 Northeast Asia: US\$2.29/KG, up \$0.11 cents

NBR

North America: US\$2.48/KG, down \$0.09 cents
 Northeast Asia: US\$2.23/KG, up \$0.08 cents

SBR

North America: US\$1.91/KG, up \$0.05 cents
 Northeast Asia: US\$1.72/KG, up \$0.09 cents

Neoprene

North America: US\$3.03/KG, up \$0.20 cents
 Northeast Asia: US\$2.95/KG, up \$0.19 cents

EPDM

North America: US\$2.35/KG, down \$0.03 cents
 Northeast Asia: US\$2.40/KG, up \$0.04 cents

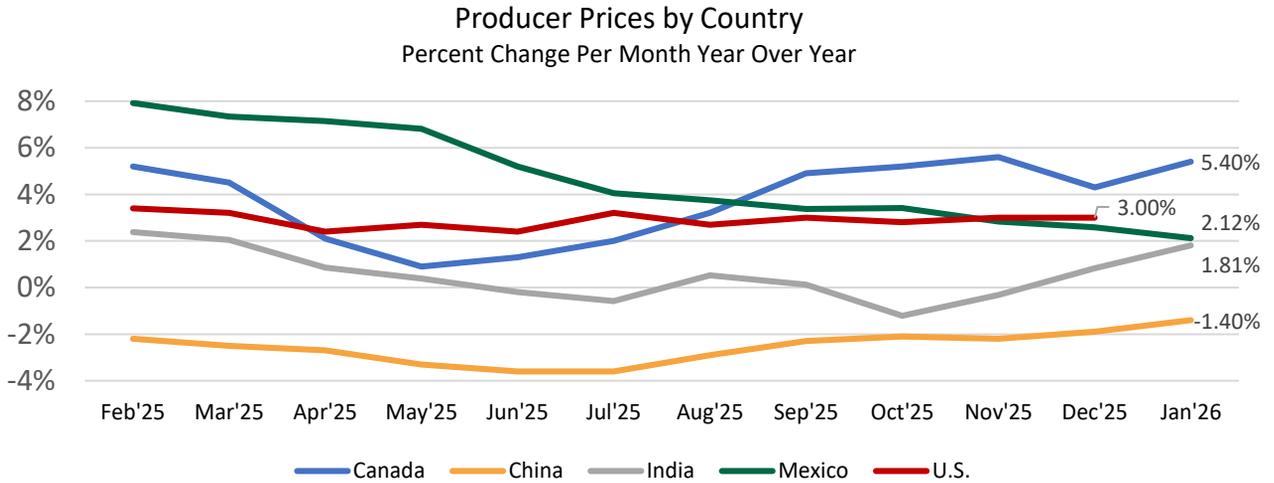
Silicone

North America: US \$6.00/KG, up \$0.35 cents
 Northeast Asia: US\$2.32/KG, up \$0.02 cents

February Summary:

- Global natural rubber prices are sitting around \$1.82 U.S. per kilogram, up slightly since the end of 2025, supported by seasonal supply constraints and expectations of stronger demand.
- Most major rubber-producing regions in Southeast Asia have largely concluded rubber tapping as production moves into the off-season. Rubber trees typically see reduced output from February through May, before production picks up again, in June through September.
- Worldwide demand for natural rubber is projected to exceed production for a sixth straight year in 2026. Output is projected to increase by 2.4% in 2026, reaching 15.2 million tons while demand is expected to grow by 1.7%, climbing to 15.6 million tons.

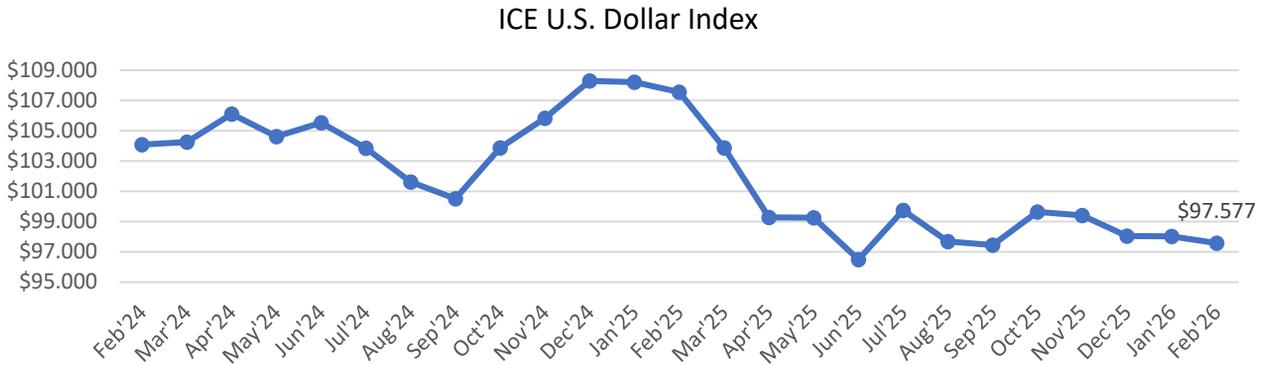
Producer Prices By Country



Key Takeaways:

- U.S. Producer Prices rose 0.5% in December, with intermediate processed goods sitting up 3.4% YoY. Overall, U.S. producer prices ended 2025 up 3.0%, which is an improvement from the 3.5% in 2024.
- China's producer prices dropped 1.4% YoY in January, extending the contraction to a 40th consecutive month. Production material prices fell much more slowly (-1.3% vs -2.1% in December), with decreases softening in raw materials (-2.0% vs -2.6%) and processing (-0.4% vs -1.6%).
- India's wholesale prices rose 1.81% YoY in January, accelerating from a 0.83% increase in December. This marked the sharpest growth since March 2025, driven by a pickup in manufacturing inflation (2.86% vs 1.82% last month).

Foreign Exchange



Key Takeaways:

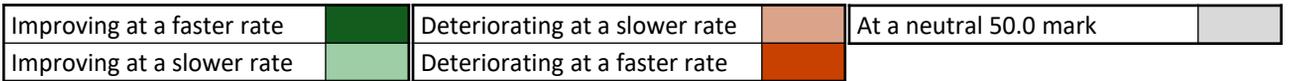
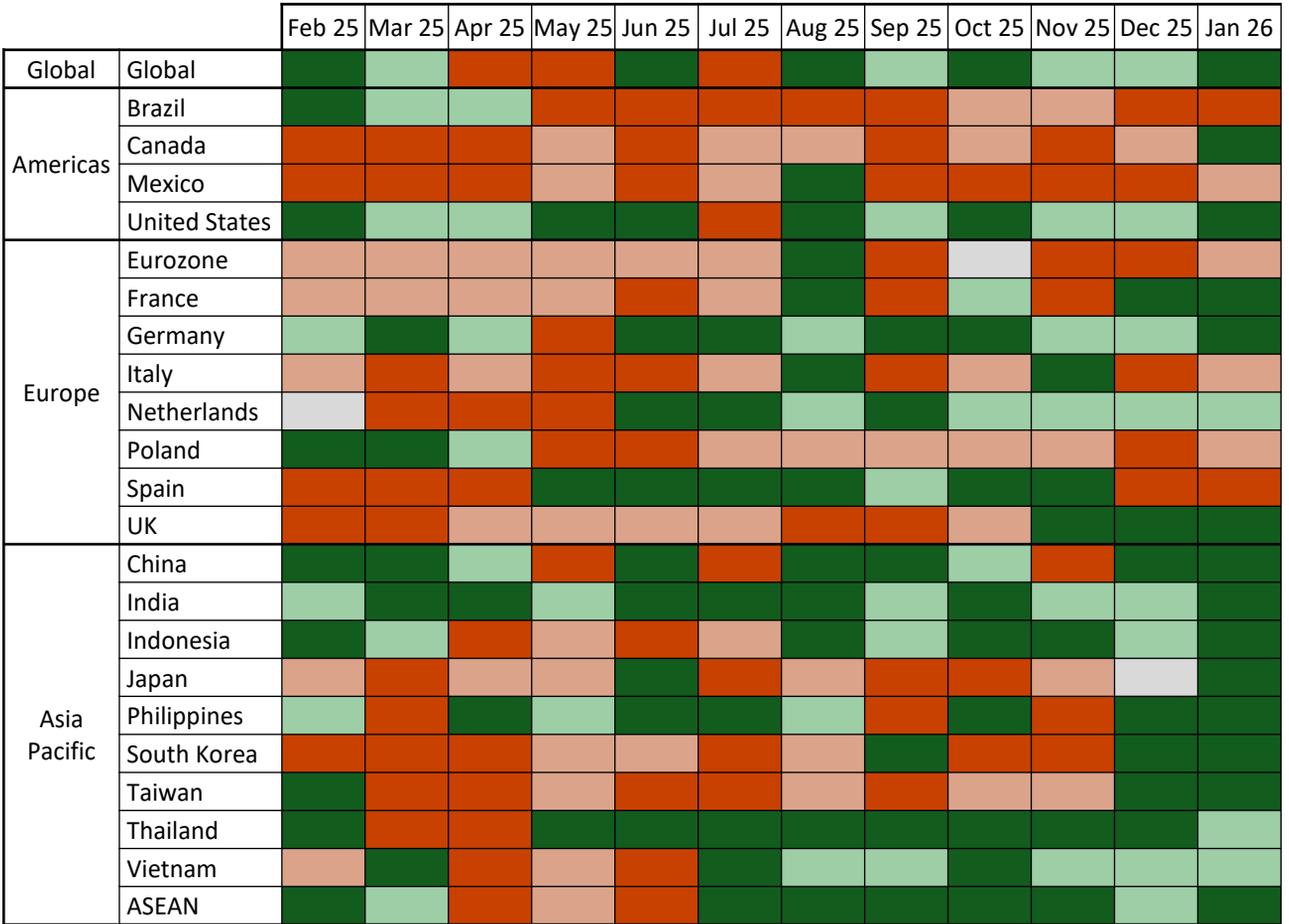
- The ICE U.S. Dollar Index (DXY) is a benchmark measuring the value of the USD against a basket of six major currencies (EUR, JPY, GBP, CAD, SEK, CHF). It serves as a key indicator for the currency's strength.
- A weaker U.S. dollar generally makes it more expensive for businesses to import goods from 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 operation as it would inflate revenues in dollar terms, while expenses (like the salaries of stateside executives) remain stable.

February Summary:

- In February, the U.S. dollar initially rebounded from January's lows, climbing toward the 99 mark and reaching a one-month high, supported by a hawkish Federal Reserve, rising geopolitical tensions with Iran, as well as stronger U.S. economic data. However, the rally faded after President Trump's State of the Union address offered limited detail on future tariff policy, prompting a pullback.

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:

- Global economic expansion accelerated to start the year with a notable improvement in the manufacturing sector. Production rose at the highest pace since June 2024.
- The upturn for the goods producing sector was driven by the fastest rise in new orders in nearly a year.
- That said, global output price inflation intensified in January as costs continued to rise at an elevated pace.

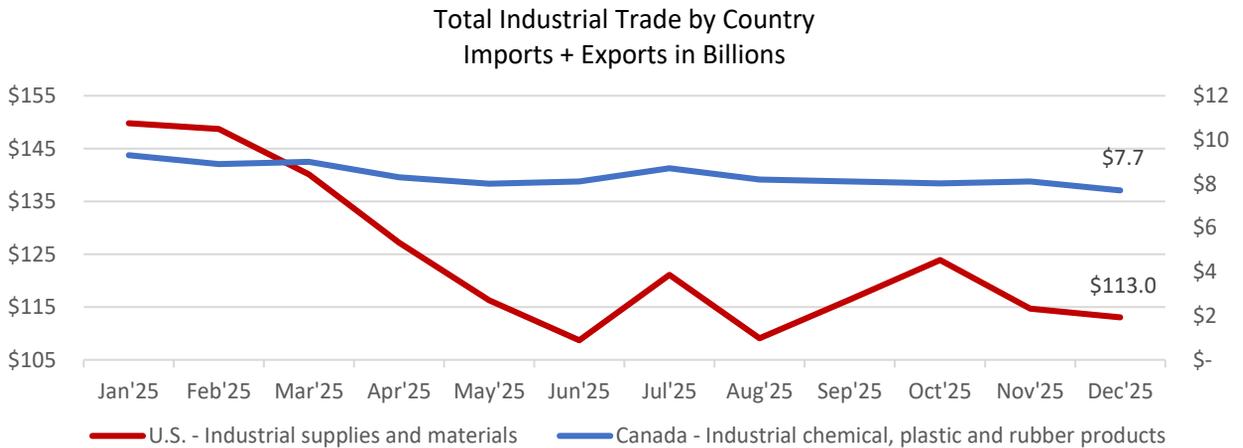
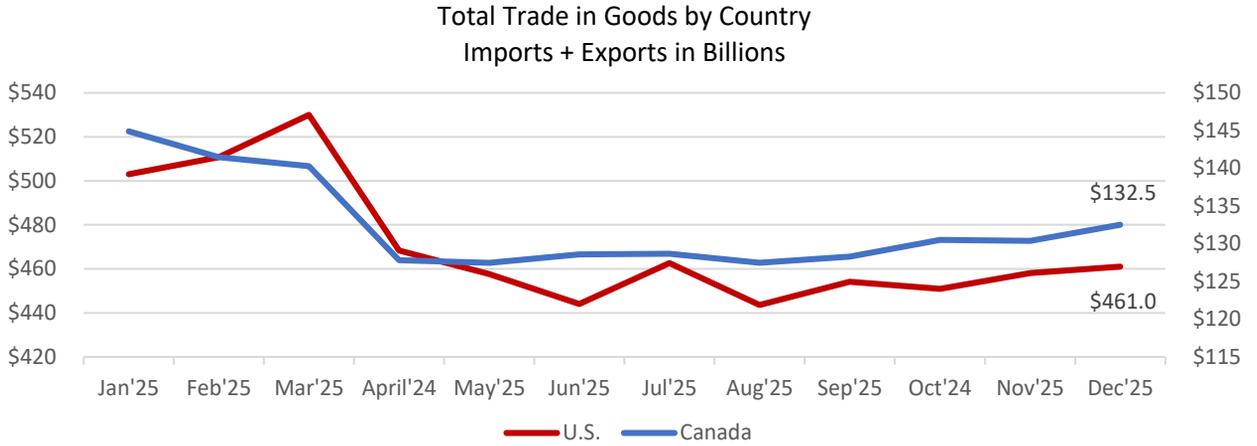
Global Sectors Heatmap

	Feb 25	Mar 25	Apr 25	May 25	Jun 25	Jul 25	Aug 25	Sep 25	Oct 25	Nov 25	Dec 25	Jan 26
Basic Materials	Dark Green	Dark Orange	Dark Orange	Dark Orange	Light Orange	Dark Orange	Light Orange	Dark Green	Dark Green	Light Green	Dark Orange	Dark Green
Chemicals	Dark Green	Dark Orange	Light Grey	Dark Orange	Dark Green	Dark Orange	Light Grey	Dark Green	Dark Green	Light Green	Dark Orange	Dark Green
Resources	Dark Orange	Dark Orange	Dark Orange	Dark Orange	Light Orange	Light Orange	Light Orange	Light Orange	Dark Green	Light Green	Dark Orange	Light Orange
Forestry & Paper Products	Dark Orange	Dark Orange	Dark Green	Dark Orange	Dark Orange	Dark Green	Light Green	Dark Orange	Dark Green	Light Green	Dark Orange	Dark Orange
Metals & Mining	Light Orange	Dark Orange	Dark Orange	Dark Orange	Light Orange	Dark Orange	Light Orange	Light Orange	Dark Green	Light Green	Dark Orange	Light Orange
Industrials	Light Grey	Dark Green	Light Green	Dark Green	Dark Green	Dark Green	Dark Green	Light Green	Light Green	Dark Green	Dark Green	Dark Green
Industrial Goods	Dark Green	Light Green	Dark Green	Light Green	Dark Green	Dark Orange	Dark Green	Light Green	Dark Orange	Dark Green	Dark Green	Dark Green
Machinery & Equipment	Dark Green	Light Green	Dark Green	Light Green	Dark Green	Dark Orange	Dark Green	Light Green	Dark Orange	Dark Green	Dark Green	Dark Green
Construction Materials	Dark Green	Dark Orange	Dark Green	Dark Orange	Dark Green	Dark Orange	Dark Green	Dark Green	Dark Green	Light Green	Dark Green	Dark Orange
General Industrials	Dark Green	Light Green	Dark Orange	Light Orange	Dark Orange	Dark Green	Dark Green	Light Green	Dark Green	Light Green	Dark Green	Dark Green
Transportation	Dark Orange	Dark Green	Light Grey	Dark Green	Dark Green	Dark Green	Light Green	Light Green	Light Green	Dark Green	Light Green	Dark Green
Improving at a faster rate	Dark 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		Dark Orange								

Key Takeaways:

- The latest S&P Global Sector PMI data indicated that both industry groups reported growth globally in January, as the Basic Materials sector rejoined the expansion.
- Growth was also recorded in 5 of the 9 detailed sectors, with the slowest declines limited to manufacturing-oriented industries, specifically forestry & paper products and construction materials.
- Industrials continue to set the pace for the third consecutive month, with four of the five detailed sectors reporting strong rate growth.

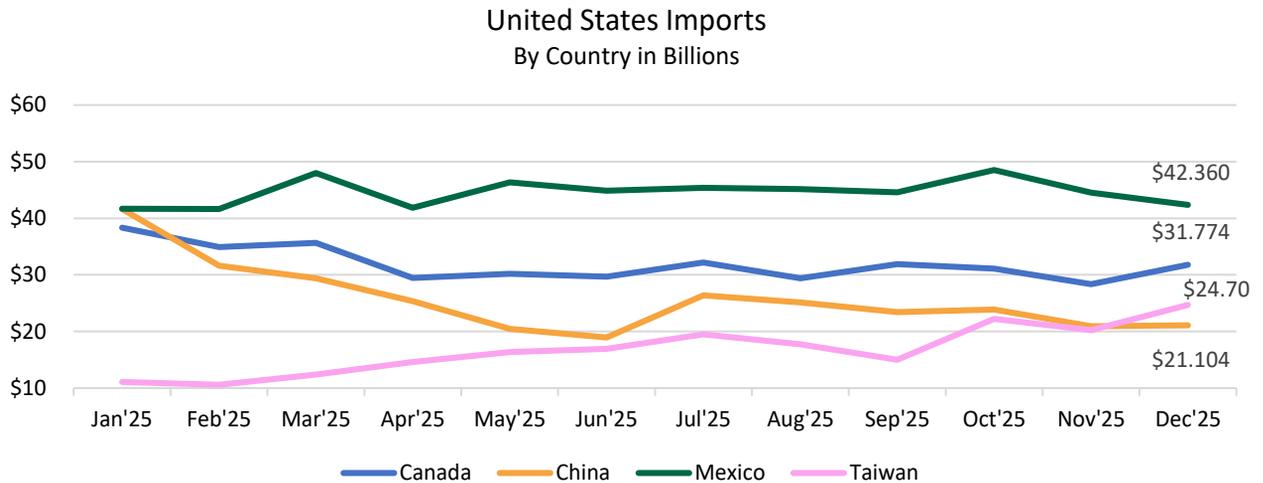
Total Trade Volume



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., December’s total goods exports declined by \$5.5 billion to \$180.8 billion, while imports increased by \$10.2 billion to \$280.2 billion. For 2025 overall, total goods trade decreased 8.3%, with industrial trade falling more sharply, down 24.5%.
- For Canada, December’s total merchandise exports rose 2.6%, while imports also edged up 0.6%. For 2025, similarly to the U.S. total merchandise trade declined 8.5%, and industrial trade contracted 17.2%.

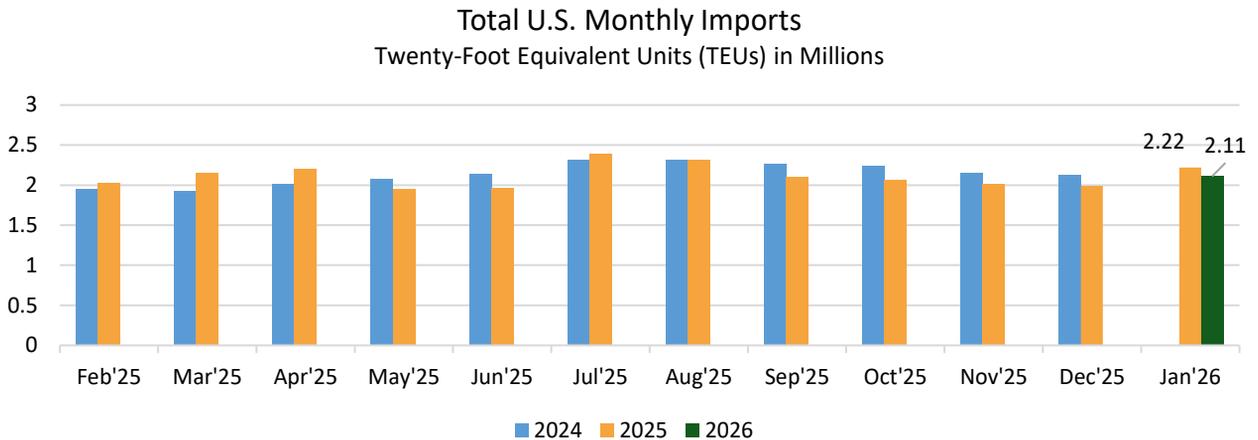
Total U.S. Impots By Country



Key Takeaways:

- Mexico remained the United States largest trading partner in 2025, with imports significantly outpacing those from any other country. This performance was driven by strength in sectors like manufacturing, automotive components, and electronics.
- U.S. imports from Canada increased by 1.1% in December, marking a modest rebound from a weak November. However, on an annual basis, imports from Canada declined by 17.1%, and the proportion of Canadian goods destined for the U.S. dropped to 71.7% from 75.9% in 2024, the lowest share since the early 1980s.
- Interestingly, for the first time in more than 40 years, the U.S. imported more goods from Taiwan than from China in December. Imports from Taiwan surged 117% in 2025, as Trump's tariffs continued to reshape global trade flows, alongside an AI-driven boom that boosted demand for semiconductors and other technology products.
- With respect to China, U.S. imports plunged 49.3% in 2025, signaling a sharp decline. However, the picture may be misleading: Bloomberg recently reported a record \$112 billion gap between what China reported exporting to the U.S. and what the U.S. Customs and Border Protection agency said arrived. This discrepancy suggests that up to a quarter of Chinese shipments may have bypassed tariffs through evasion tactics.

Total U.S. Container Imports

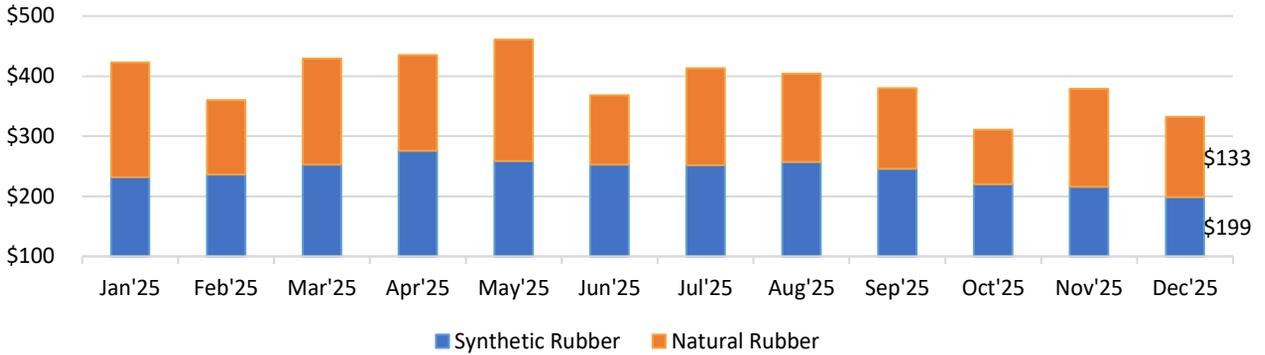


Key Takeaways:

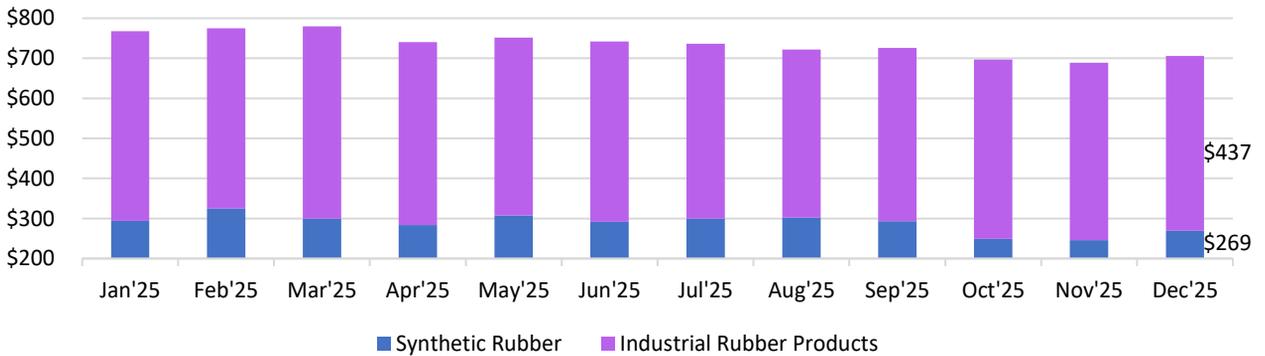
- In January, U.S. ports processed 2.11 million TEUs, which is up from December ahead of Lunar New Year factory shutdowns in Asia but down 5.2% YoY.
- U.S. containerized imports from China totaled 771,093 TEUs in January, up 9.3% month-over-month (MoM), down 22.7% YoY and 24.6% below the July 2024 peak.
- However, China's share of total U.S. container imports increased to 33.3%, reversing the decline observed the previous two months (Dec. 2025: 31.7%, Nov. 2025: 32.7%).
- China's import mix for the month remained heavily concentrated in consumer goods and industrial inputs.
- Current forecasts indicate that import volumes at the nation's major container ports are expected to decline YoY in the first half of 2026, as the effects of tariff uncertainty continue to weigh on trade.

U.S. Rubber Import & Export Stats

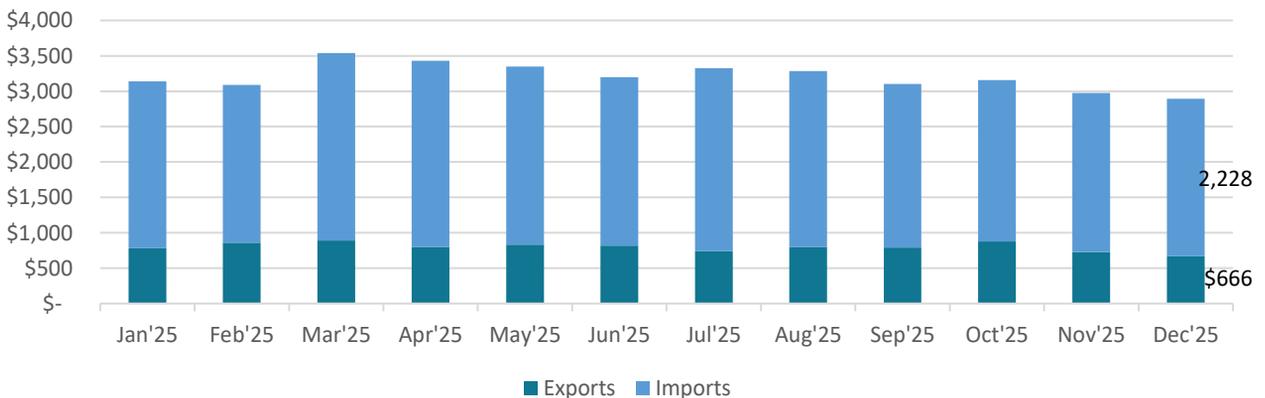
Import of Rubber Products in Millions



Export of Rubber Products in Millions



Rubber Manufactured Goods in Millions



U.S. Industry Import Index

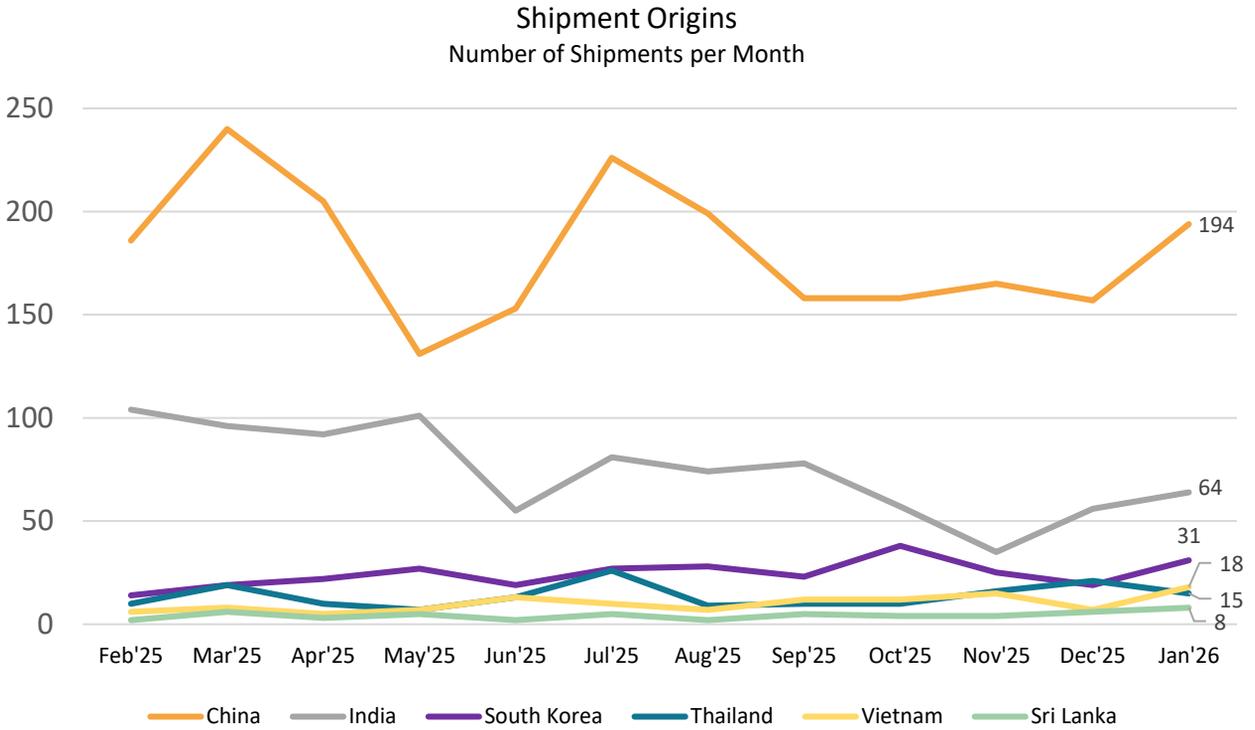
Institute for Supply Management (IMS®) Import Index						
Month	Percent Reporting	% Higher	% Same	% Lower	Net	Index
Jan 2026	85%	11.3%	77.4%	11.3%	+0.0	50.0
Dec 2025	84%	9.5%	70.1%	20.4%	-10.9	44.6
Nov 2025	84%	13.4%	71.0%	15.6%	-2.2	48.9
Oct 2025	84%	10.4%	69.9%	19.7%	-9.3	45.4
Sep 2025	84%	9.9%	69.6%	20.5%	-10.6	44.7

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

Key Takeaways:

- After a nine-month period of contraction, January saw an increase of 5.4% pushing the index ever so slightly into growth territory.
- The Seven industries that reported higher imports in January are: Apparel, Leather & Allied Products; Furniture & Related Products; Primary Metals; Transportation Equipment; **Plastics & Rubber Products**; Miscellaneous Manufacturing; and Machinery.
- The seven industries that reported lower volumes in January are: Printing & Related Support Activities; Wood Products; Nonmetallic Mineral Products; Fabricated Metal Products; Electrical Equipment, Appliances & Components; Chemical Products; and Computer & Electronic Products.

U.S. Sheet Rubber Imports By Country



Key Takeaways:

- One month into 2026 and China continues to have a strong hold on the top spot for sheet rubber imports into the U.S. with a 43.4% market share, maintaining its top position from 2025.
- India (14.3%) and South Korea (6.9%) are the next-largest importing regions, while Vietnam (4.0%), Thailand (3.4%), and Sri Lanka (1.8%) hold smaller but notable shares.
- The top three suppliers account for over 64% of U.S. sheet rubber imports, highlighting their continued importance to the marketplace.

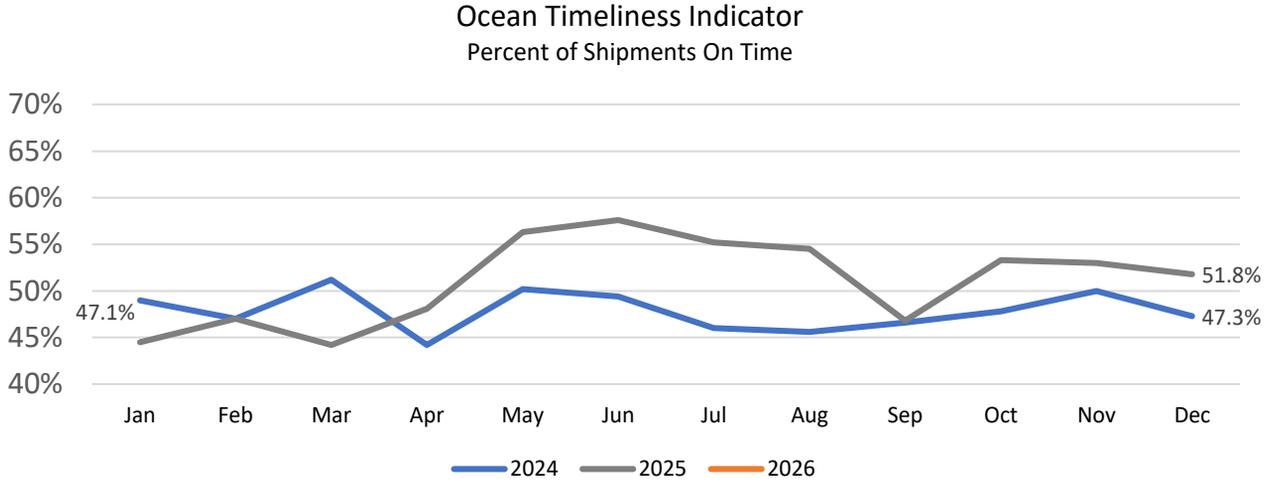
Port Operations

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	7 days				
	OAK	2	0 days	6 days				
	SEA/TAC	1	0 days	5 days				
Canada West Coast	Van	0	3 days	7 days				
	PRR	4	1 day	8 days				
U.S. East Coast / Gulf Coast	NY/NJ	3	3 days	5 days				
	BAL	6	6 days	1 day				
	NOR	4	4 days	3 days				
	CHS	1	1 day	3 days				
	SAV	10	1 day	2 days				
	HOU	1	4 days	6 days				
Improving over last month			Consistent over last month			Deteriorating over last month		

Key Takeaways:

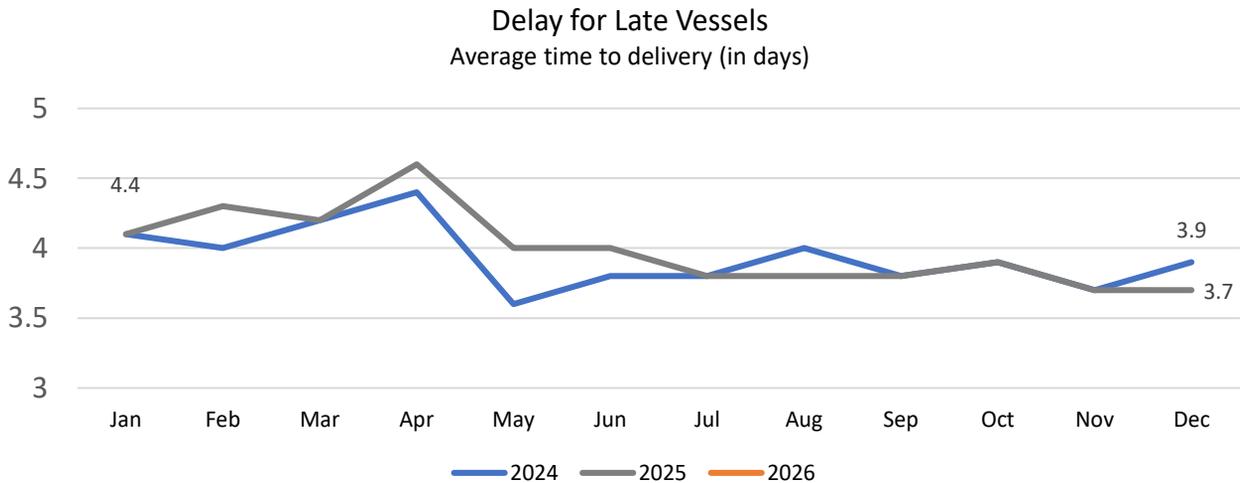
- Port-level performance was broadly positive in January, with gains concentrated at several major gateways, including Houston, Oakland, New York/Newark, and a notable rebound across Gulf Coast ports.
- Port transit delays showed only modest, uneven changes in January, with no signs of widespread congestion.
- China-origin imports increased MoM and regained share following late-2025 softness, though overall volumes remain well below prior peaks.
- At the same time, sustained growth from Southeast Asian origins continue to partially offset decreased volumes from China.
- Moving into February, several countries in Asia, including China, South Korea, Taiwan, the Philippines, and Vietnam, suspended port operations during the Lunar New Year, which was observed from Feb.16 to 19 in most of the region. Due to the holiday, manpower shortages resulted in reduced vessel productivity and longer port stays.

Global Ocean Freight Schedule Reliability



Key Takeaways:

- Global schedule reliability reached 47.1% in January 2026, marking a moderate MoM decline from December, but closely matching the opening levels seen in the previous two years.
- Asia ↔ North America East Coast continues to fall near the bottom for schedule reliability operating at 46.0% for January. Asia ↔ North America West Coast is operating much better coming in at 58.1% for the month.



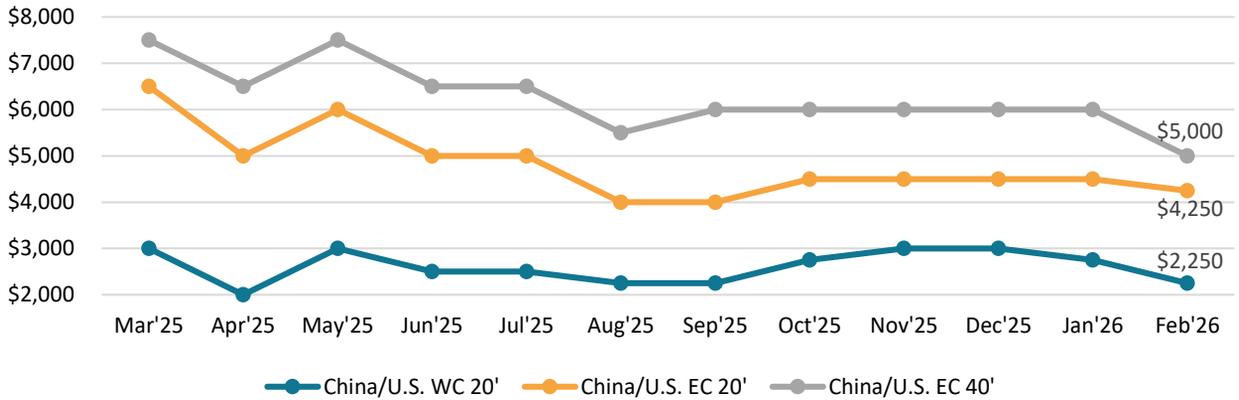
Key Takeaways:

- Average vessel delays increased to 4.4 days behind schedule to start the year. The increase in delay is due to several factors including routing issues, longer wait times for transshipments at busy ports and winter weather storms.

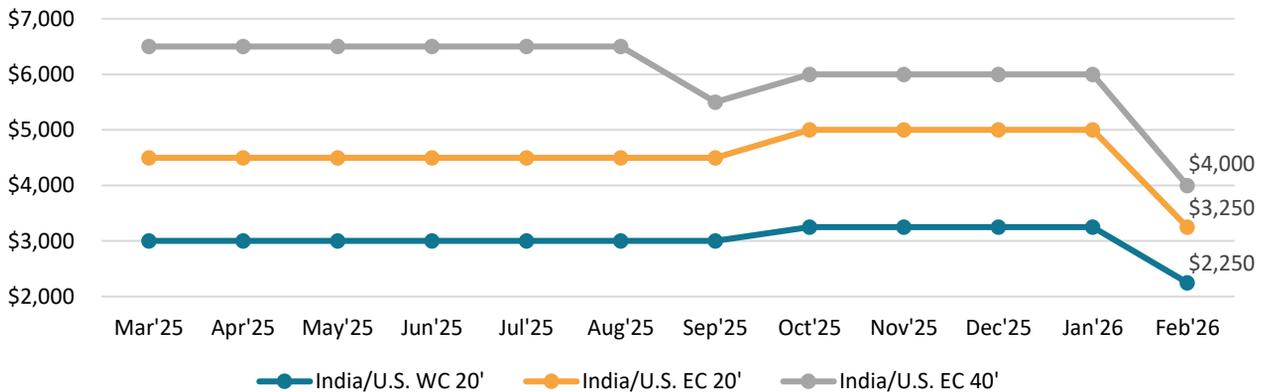
Ocean Freight Rates

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

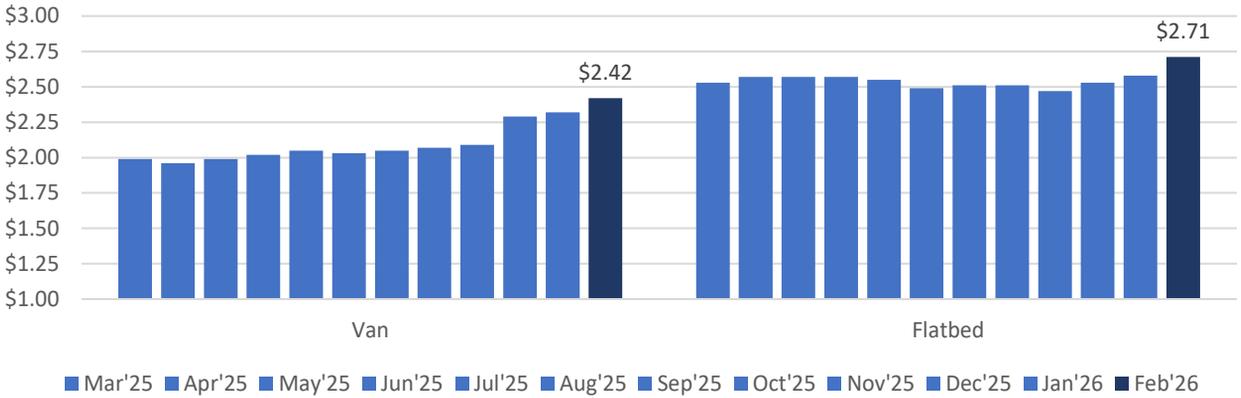


Key Takeaways:

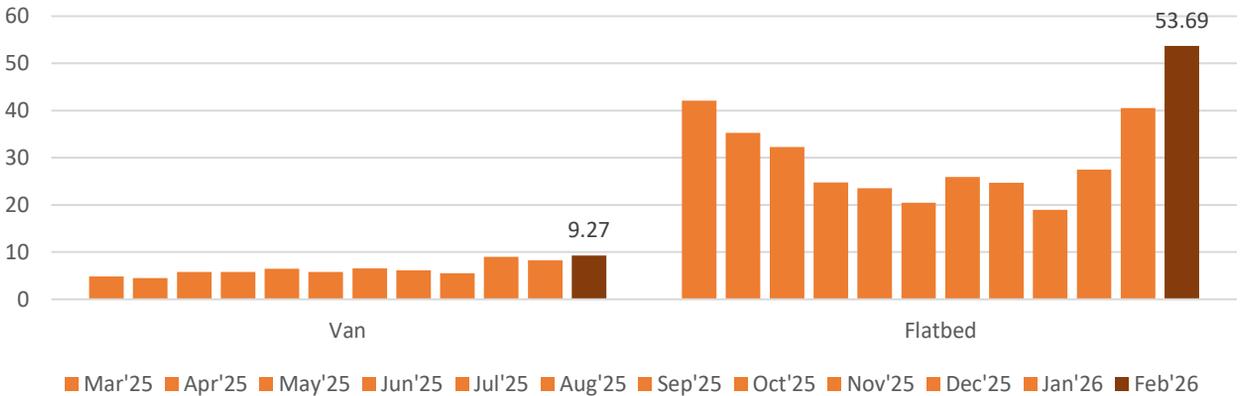
- The market has entered the quietest phase of the Lunar New Year holiday period. With factories slowly coming back online and export demand from Asia restarting after a temporary pause.
- Carriers actively managed the downtime with aggressive blank sailing programs, removing ~40% of weekly capacity to prevent oversupply and maintain vessel utilization.
- Rates have dropped to start the year as demand shifts between periods of geopolitical stability and uncertainty. Carriers have been doing their best to keep rates from sliding much lower by deploying blank sailings and rerouting vessels via longer Cape of Good Hope transits.

Truckload Shipping

North American Trucking Rates
Average Spot Rate/Mile, U.S. Dollars



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

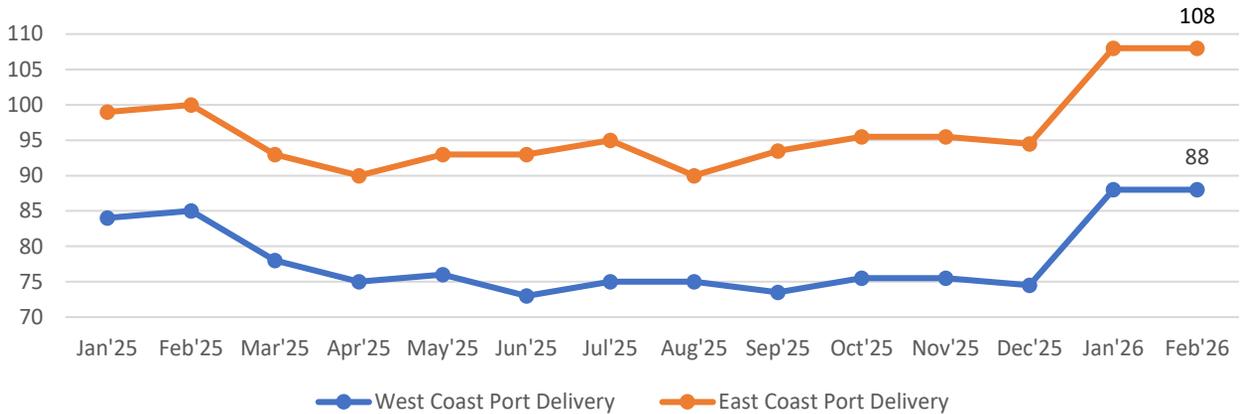


Key Takeaways:

- Van and flatbed spot rates rose sharply in late January as Winter Storm Fern set in. The rally carried into February, and while indicators suggest it may now be leveling off, spot rates remain meaningfully elevated YoY.
- Looking ahead, even if a steep near-term price decline takes place rates will likely continue to post double-digit growth above 2025 levels through the remainder of 2026.
- Persistently elevated rates at this point in the year tends to set a higher floor moving forward, so as seasonal demand builds through the spring and summer, the added tightness is expected to push spot rates higher.

GCP Production Times

Number of Days to Produce & Deliver an Order
Average for All GCP Products/Product Lines



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 February 2026 production index. ([View here](#))
- In February, GCP production times increase 8% MoM for East Coast delivery and 3.5% for West Coast delivery. The uptick aligns with typical seasonal slowdowns and factory closures surrounding Chinese New Year.

Resources

Tariffs Roundup

- <https://www.bloomberg.com/news/articles/2026-02-20/trump-s-global-tariffs-struck-down-by-us-supreme-court>
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