INDUSTRIAL TRADE REPORT | **August 2026**

MOMENTUM OVER FRICTION

Eight months into 2026, the industrial economy continues to do something increasingly difficult: grow through the friction surrounding it. Global manufacturing has now expanded for twelve consecutive months, industrial activity is broadening across sectors, and U.S. import volumes remain well above pre-pandemic levels. Yet the forces we have tracked throughout the year have not disappeared. Raw material costs remain elevated, rubber pricing is moving higher, freight costs continue to rise, and another round of tariff measures is adding complexity to global trade. What is impressive is the market's ability to operate alongside these pressures rather than crumble under them. Growth is no longer accelerating everywhere, and some indicators suggest momentum is beginning to moderate, but the broader industrial market remains resilient. For now, the evidence suggests industrial momentum is proving more durable than the pressures working against it.

By GCP Industrial Products

Executive Brief

Throughout 2026, we have watched the industrial economy repeatedly absorb higher costs, shifting trade policy, and supply chain disruption without losing its underlying momentum. August extends that story. Growth remains remarkably broad, reinforcing an industrial economy that continues to hold its ground despite an increasingly difficult operating environment.

Industrial growth continues to broaden - Global manufacturing production expanded for the 12th consecutive month in July, while 19 of 21 monitored sectors reported growth.

Cost pressures remain elevated, but down from their peak - Raw material prices are still increasing across much of the industrial economy, but the intensity of those increases has eased considerably from earlier in the year.

Rubber pricing is moving higher again - After providing some relief in July, rubber markets reversed direction across several major categories. SBR, EPDM, and silicone prices increased in both North America and Northeast Asia, while elevated oil prices and tightening seasonal supply are creating renewed upward pressure on natural and synthetic rubber.

U.S. import demand remains resilient - U.S. container imports reached 2.5 million TEUs in July, 14.1% above pre-pandemic 2019 levels. The ISM Import Index also strengthened to 55.7, its highest reading of the year, reinforcing the continued strength of industrial import activity.

Global sourcing continues to evolve, not retreat - Mexico reached a record $55.3 billion in U.S. imports in June, while imports from Canada continued to strengthen and China recorded its fourth consecutive monthly increase.

Freight is becoming a renewed source of pressure - Asia-to-U.S. ocean rates continue to rise as carriers manage capacity alongside Panama Canal restrictions, fuel surcharges, and weather disruptions.

Trade policy is adding another layer of complexity - New U.S. tariffs on a broad range of Canadian products and the threat of secondary sanctions against countries and companies trading with Iran are creating additional uncertainty.

Contents

Tariffs

Tariffs on Canada

- On August 19th, the Trump administration imposed a 50% tariff on a broad range of Canadian products, under Section 338 of the U.S. Tariff Act.

- These are in addition to other applicable duties, although there are important exclusions, including products already covered by certain Section 232 tariffs.

- The latest U.S. measures affect more than 550 Canadian Harmonized Tariff Schedule (HTS) subheadings, representing roughly U.S.$20 billion of Canadian exports to the U.S.

- HTS code 4008.21.00.00 (plates, sheets, and strip of non-cellular vulcanized rubber) is currently subject to a 0% standard duty and is not affected by the 50% U.S. tariffs imposed on Canadian exports.

- However, while raw or uncut non-cellular rubber sheets classified under HTS 4008.21 are not subject to the tariff, further processing into finished gaskets or seals shifts their classification, potentially making the finished products subject to the 50% tariff.

Sanctions on Iran’s Trading Partners

- On August 25th, the Trump administration threatened secondary sanctions against countries and companies that continue to do business with Iran.

- Treasury Secretary Scott Bessent has said the U.S. will give Iran's trading partners a “defined timeline” to wind down certain economic ties, but Washington has not publicly announced the date by which those countries and companies must comply.

- The U.S. has not yet specified a single uniform penalty, but the practical threat is being cut off from the U.S. financial system and dollar transactions.

- Additionally, the administration could apply further sanctions on key sectors, particularly oil, shipping, aviation, gold, technology and digital assets. The U.S. administration has already begun targeting companies and vessels involved in Iranian oil and sanctions evasion.

- There is also the potential of further tariffs on countries that buy from Iran. Separately, a February executive order authorized the administration to impose additional tariffs (25%) on goods imported into the U.S. from countries that directly or indirectly purchase Iranian goods or services.

Raw Material Pricing

Institute for Supply Management (ISM®) Price Index					
Month	Prices Higher	Prices Same	Prices Lower	Net	Index
Jul 2026	50.2%	41.7%	8.1%	+42.1	71.1
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
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	(green)
Price index above 50 means prices are increasing	(red)

Key Takeaways:

- The ISM® Prices Index registered 71.1% in July, indicating raw materials prices increased for the 22nd straight month.

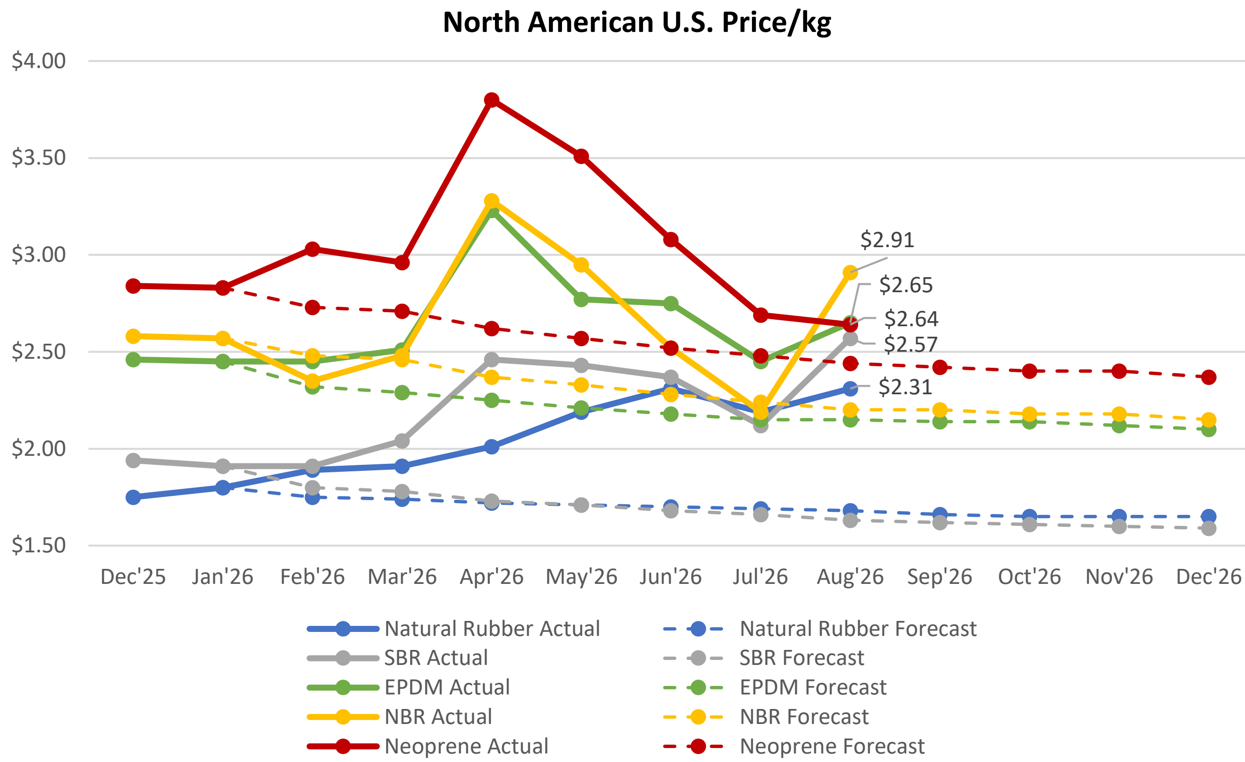
- Overall, prices are still being driven by (1) increases in steel and aluminum prices that impact the entire value chain, (2) tariffs applied to many imported goods and (3) increases in petroleum-based products because of the Middle East conflict.

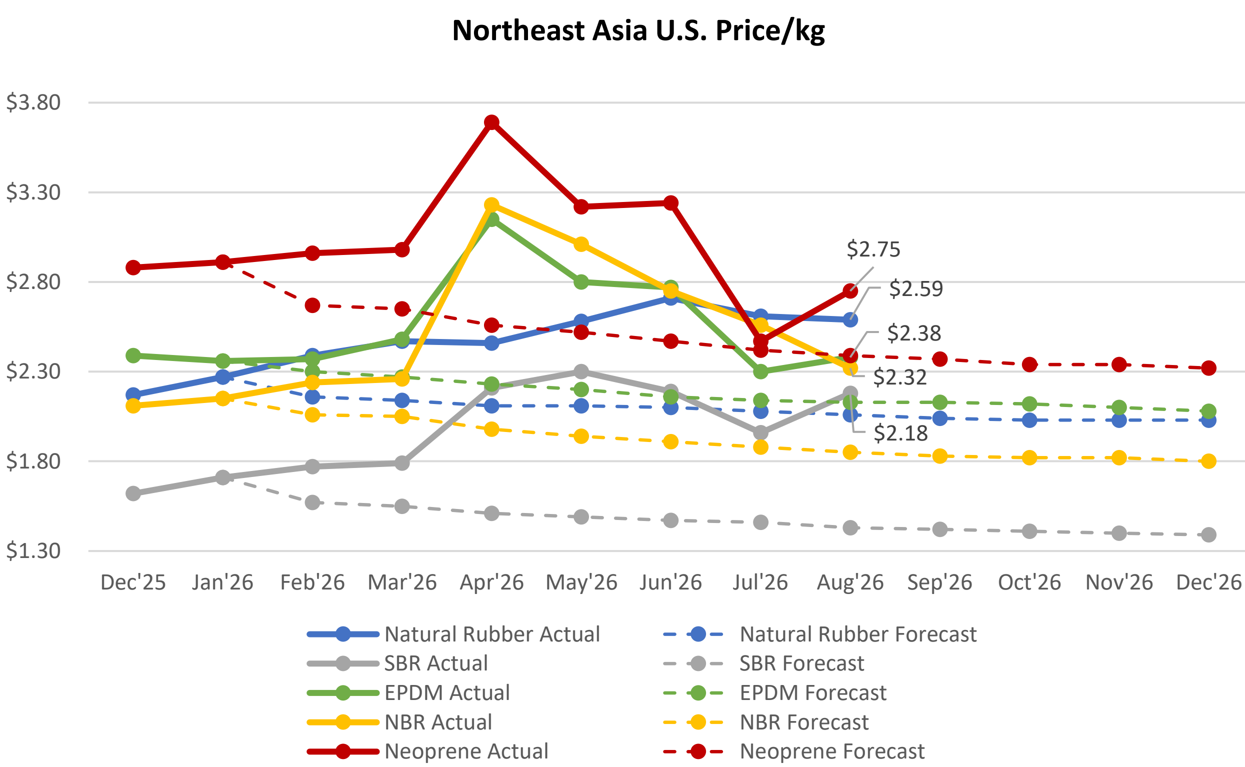
- In July, 14 of 18 industries reported paying increased prices for raw materials: Textile Mills; Wood Products; Paper Products; Electrical Equipment, Appliances & Components; Furniture & Related Products; Nonmetallic Mineral Products; Primary Metals; Computer & Electronic Products; Miscellaneous Manufacturing; Machinery; Fabricated Metal Products; Transportation Equipment; Chemical Products; and Food, Beverage & Tobacco Products.

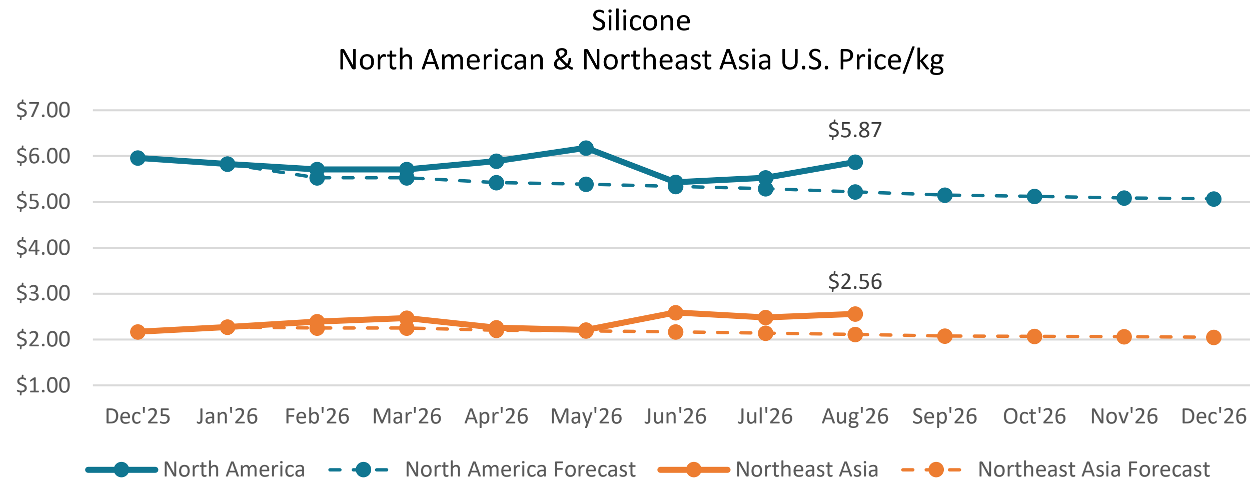
- Only one industry (Petroleum & Coal Products) reported paying decreased prices for raw materials in July.

- The **Plastics & Rubber Products** industry reported no change in raw material prices from June.

Rubber Pricing







Month-Over-Month Change:

Natural Rubber
North America: US$2.31/kg, up $0.12
Northeast Asia: US$2.59/kg, down $0.02

NBR
North America: US$2.91/kg, up $0.72
Northeast Asia: US$2.32/kg, down $0.24

SBR
North America: US$2.57/kg, up $0.45
Northeast Asia: US$2.18/kg, up $0.22

Neoprene
North America: US$2.64/kg, down $0.05
Northeast Asia: US$2.75/kg, up $0.28

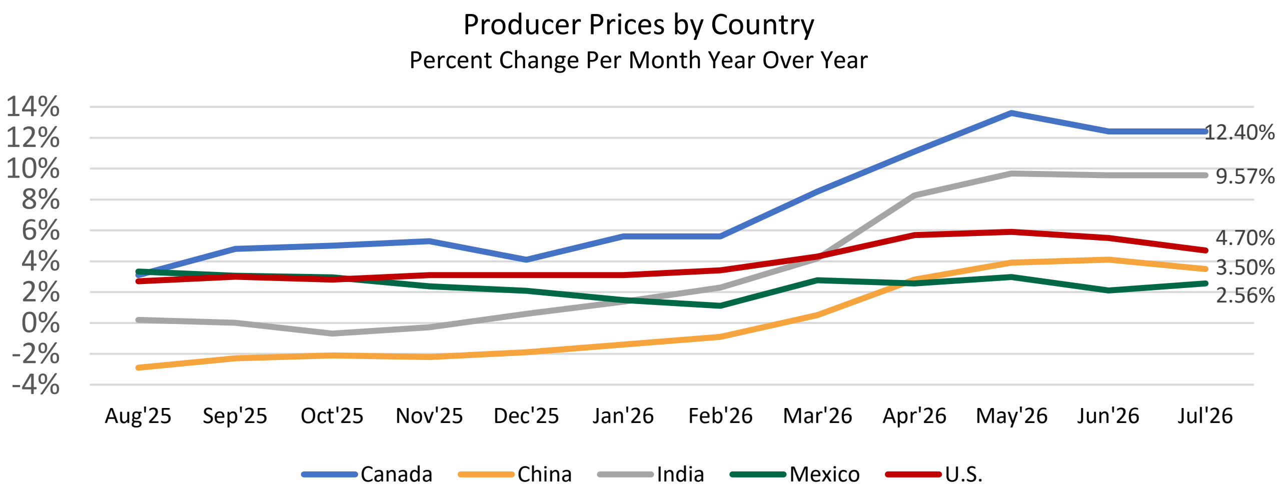
EPDM
North America: US$2.65/kg, up $0.20
Northeast Asia: US$2.38/kg, up $0.08

Silicone
North America: US$5.87/kg, up $0.34
Northeast Asia: US$2.56/kg, up $0.08

August Summary:

- Global natural rubber prices rose above 230 U.S. cents per kilogram, the highest since early June, supported by elevated oil prices and the anticipated seasonal reduction in supply.
- Tighter supply is expected once Southeast Asia's peak tapping season concludes in September. Output typically enters a period of low production from February to May, before peak harvesting continues through September.
- Meanwhile, uncertainty over the Middle East conflict and the reopening of the Strait of Hormuz kept crude prices elevated, making crude-based synthetic rubber less competitive. On the demand side, however, sluggish Chinese auto sales continued to weigh on tire demand and rubber consumption.

Producer Prices By Country



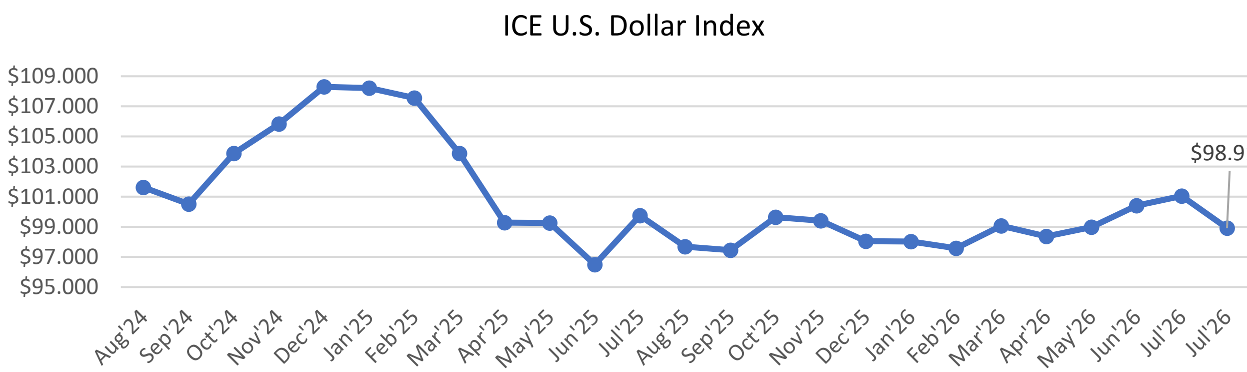
Key Takeaways:

- U.S. producer prices were unchanged in July, with much of the movement driven by a 5.7% decline in gasoline prices. Prices for other energy-related categories, including diesel fuel and crude petroleum, also fell. Further along the supply chain, prices for intermediate processed goods declined 0.6% in July but remained 9.9% higher than a year ago, while prices for intermediate unprocessed goods fell 1.8% but increased 7.1% year-over-year (YoY). Overall, producer prices are up 4.7% over the past year, an improvement from recent months but still well above the 3.2% increase recorded in the twelve months through July 2025.

- China's producer prices rose 3.5% YoY in July, easing to their lowest rate since April amid weak domestic demand and moderating energy costs. Prices of production materials continued to increase, albeit at a slower pace (4.8% vs. 5.5% in June), reflecting a further moderation in raw material costs (6.1% vs. 8.6%), while processing costs edged higher (3.1% vs. 3.0%). For the first seven months of the year, producer prices increased 1.8%, up from a 1.5% gain over the same period last year.

- India's wholesale prices remained flat in July, as higher prices for manufactured products were partly offset by a moderation in fuel and power inflation. Manufacturing prices rose 8.3% (7.5% in June), led by stronger price growth in textiles, chemicals and basic metals. Fuel and power inflation moderated to 20.1% from 27.4%, reflecting a slowdown in mineral oil and crude petroleum prices.

Foreign Exchange



Key Takeaways:

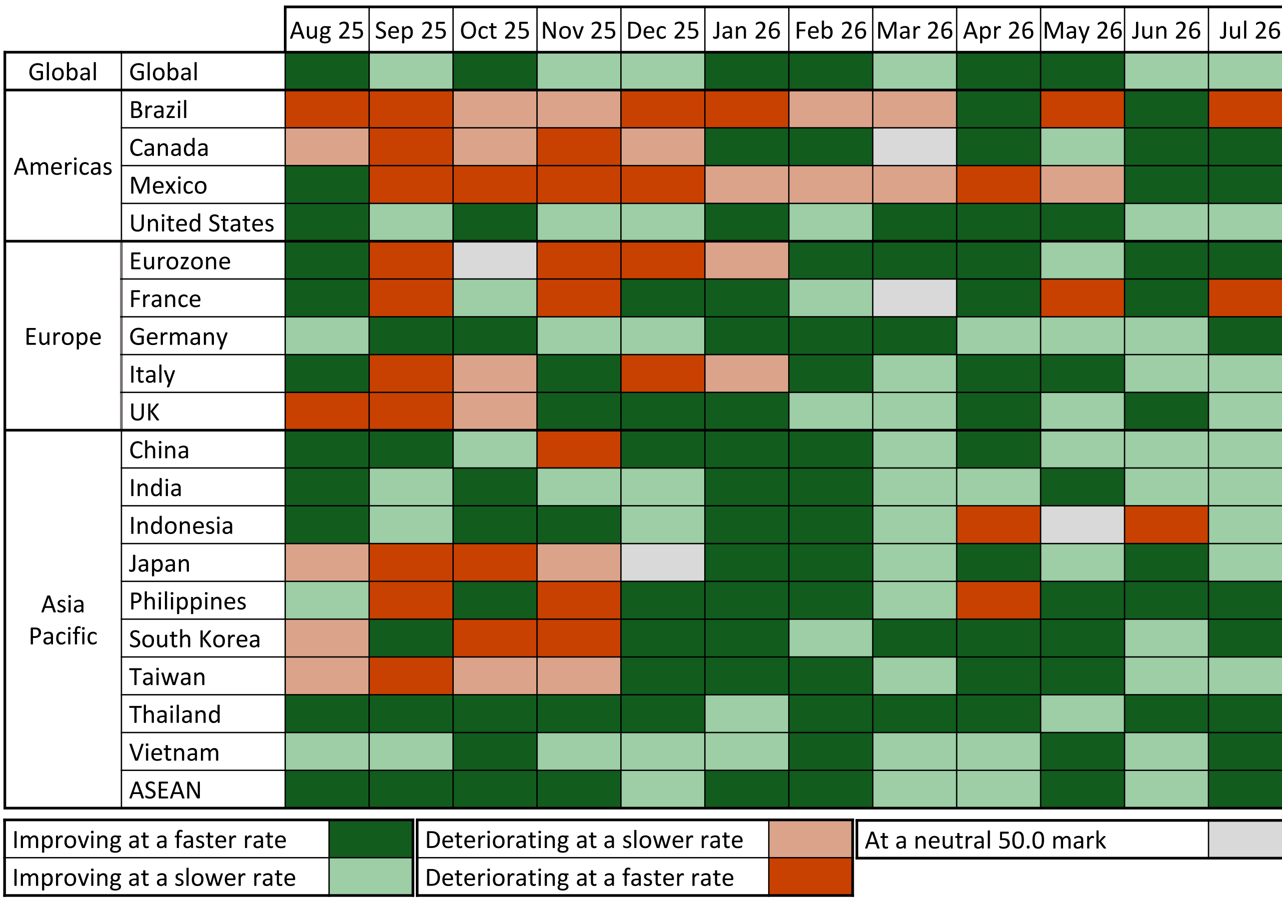
- The ICE U.S. Dollar Index (DXY) is a benchmark measuring the value of the USD against a basket of six major currencies (EUR, JPY, GBP, CAD, SEK, CHF). It serves as a key indicator for the currency's strength.
- A weaker U.S. dollar generally makes it more expensive for businesses to import goods from 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 weakened in recent weeks, reaching three-month lows amid mounting concerns over U.S. fiscal conditions as the national debt surpasses $40 trillion, contributing to growing market unease.
- While safe-haven demand stemming from escalated Middle East tensions and new trade tariffs provides a temporary floor, the dollar's near-term outlook remains highly dependent on policy.
- Further downward corrections appear increasingly likely through the end of the year unless macroeconomic data forces a hawkish realignment from the Fed.

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.



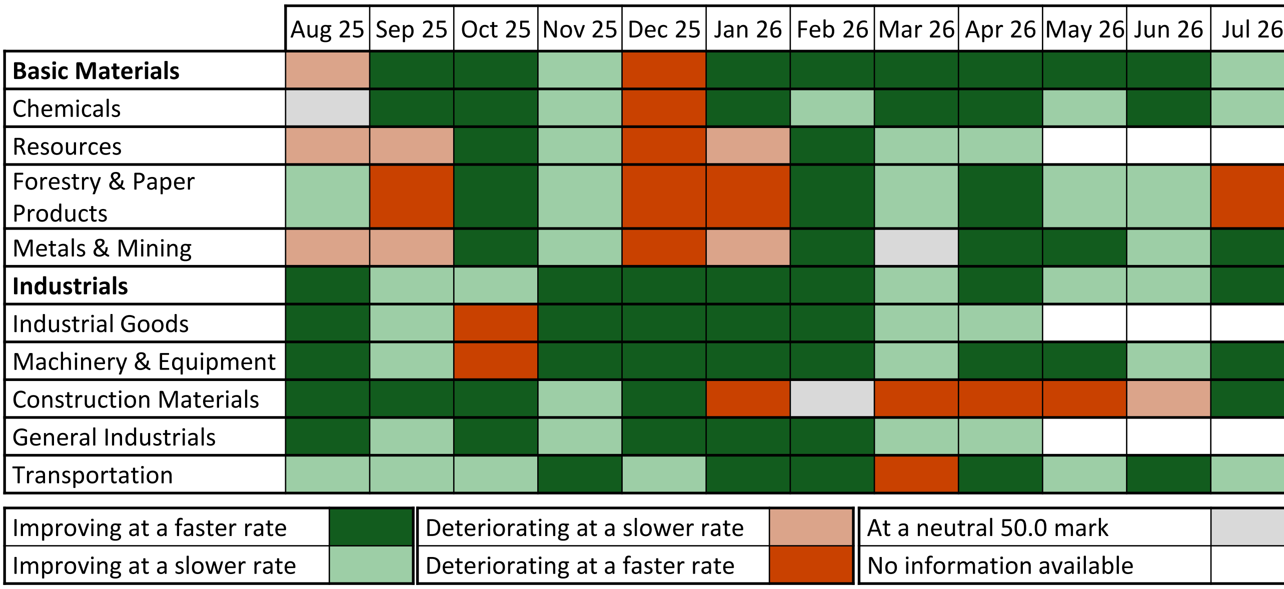
Key Takeaways:

- Global manufacturing production rose for the 12th consecutive month in July, with new orders also rising for the seventh straight month. That said, the overall rates of increase in manufacturing output and new orders eased to four-month lows.

- Production volumes rose in mainland China, the U.S., Japan and the euro area (among others), with rates of expansion easing in the first two and gaining momentum in the latter two.

- Supply delays and cost pressures moderated, but geopolitical and economic uncertainty, including concerns over tariffs, conflicts and energy prices, continued to weigh on demand and raised downside risks for factory production ahead.

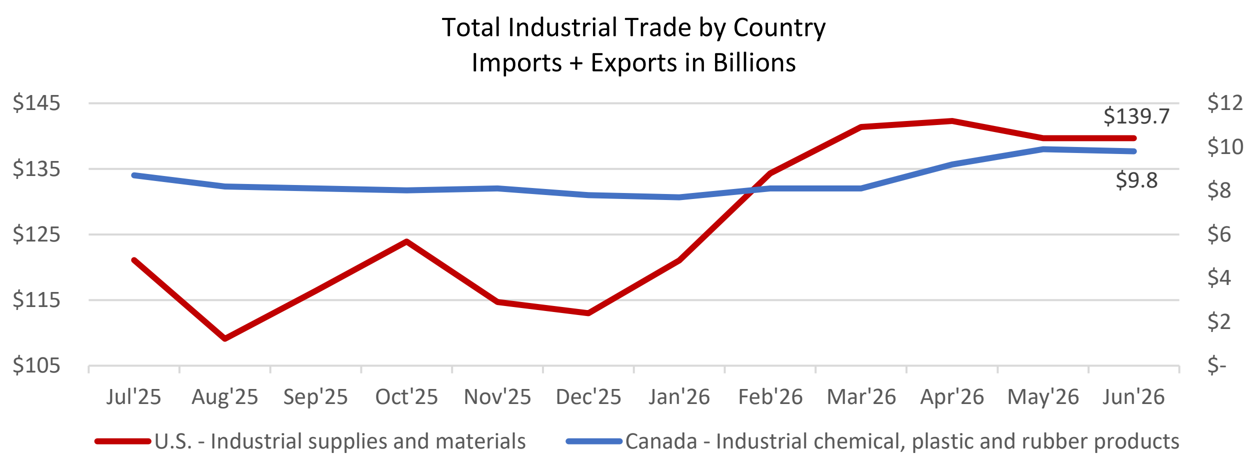
Global Sectors Heatmap



Key Takeaways:

- Growth was more widespread in July, with 19 of the 21 monitored sectors recording a rise in activity over the month.
- Specifically, business activity increased across both the basic materials and industrial sectors, marking the seventh consecutive month of expansion for basic materials and the ninth for industrials.
- The industrials sector led all growth, with business activity expanding at its fastest pace in six months.
- Basic materials had been the top-performing sector since March, although production growth slowed to its weakest pace in three months during the latest survey period.

Total Trade Volume



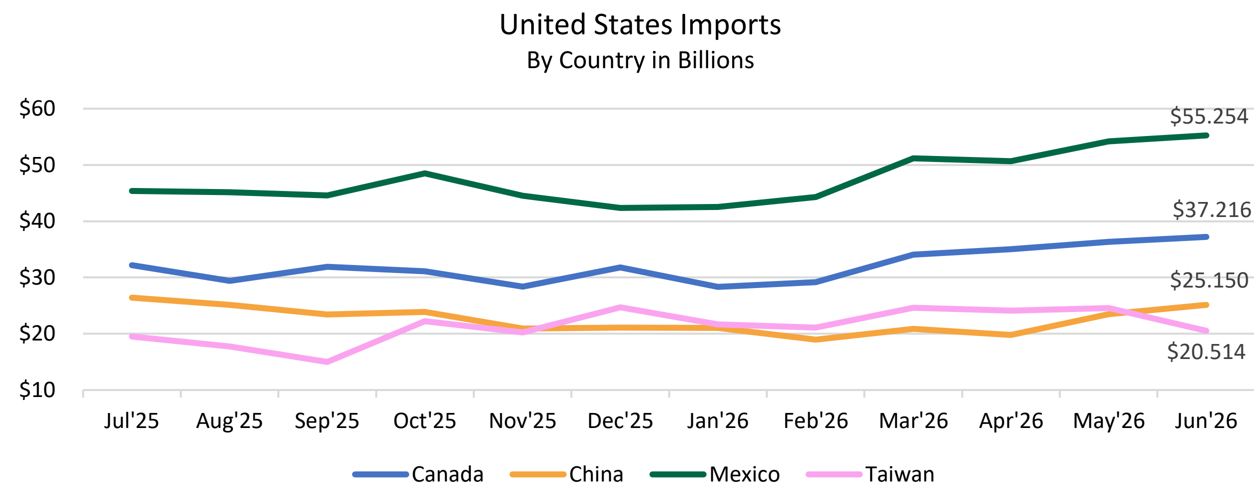
Key Takeaways:

- 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.

- Industrial trade remains elevated on both sides of the border, but momentum appears to be leveling off after the strong expansion earlier in 2026. U.S. industrial supplies and materials trade eased again in June, with exports in this category falling $3.3 billion, while the broader decline in U.S. goods imports also points to some cooling in industrial flows. Canada's industrial chemical, plastic and rubber trade similarly edged lower from May but remains near its highest level of the past year.

- Overall, industrial trade is holding at historically strong levels in both countries despite some loss of near-term momentum.

Total U.S. Imports By Country



Key Takeaways:

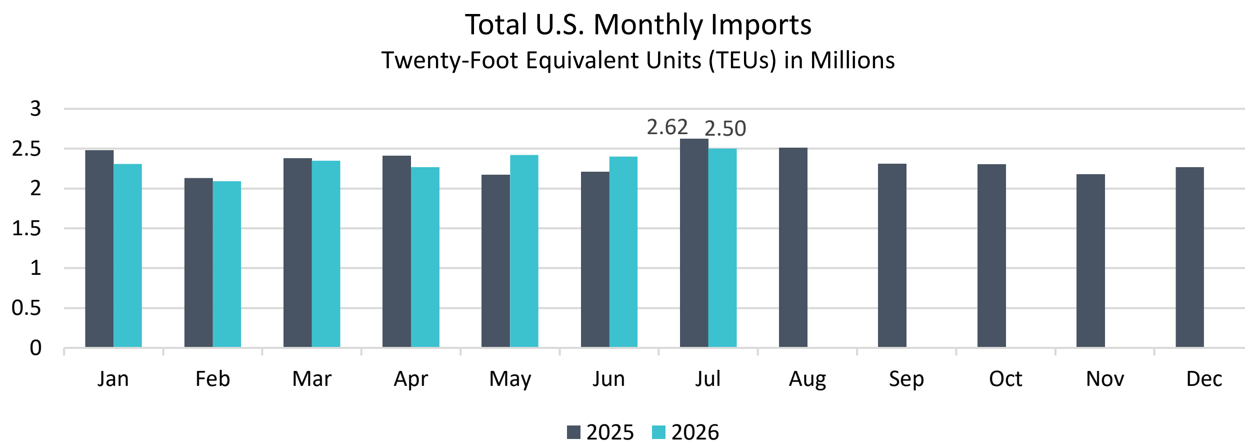
- U.S. imports from Mexico reached a record $55.3 billion in June, underscoring the continued importance of deeply integrated North American production and supply chains. Despite broader tariff and trade-policy uncertainty, the numbers indicate that Mexico's role as a critical manufacturing and sourcing hub for the U.S. continues to expand. Through the first half of 2026, imports have reached approximately $298.2 billion, putting Mexico firmly ahead of the other major U.S. trading partners examined here.

- U.S. imports from Canada increased for a fifth consecutive month, reaching $37.2 billion in June, up 2.4% from May and roughly 25.5% from June 2025. This is Canada's highest monthly level since January 2025 and suggests that cross-border trade has continued to strengthen despite ongoing tariff and trade-policy uncertainty.

- U.S. imports from China rose to $25.2 billion in June, up 7.0% from May and approximately 33.1% from June 2025, marking the fourth consecutive monthly increase. However, the longer-term picture remains more of a question. Through the first six months of 2026 imports have totaled $129.3 billion, compared with roughly $169.6 billion during the same period last year, a decline of nearly 24%.

- After remaining above $24 billion for three consecutive months, U.S. imports from Taiwan fell sharply to $20.5 billion in June, down approximately 16.5% from May. Despite the monthly decline, imports remained roughly 21.2% higher than in June 2025. The broader trend therefore remains strong, with the sustained increase underscoring Taiwan’s growing importance to U.S. technology and advanced-manufacturing supply chains.

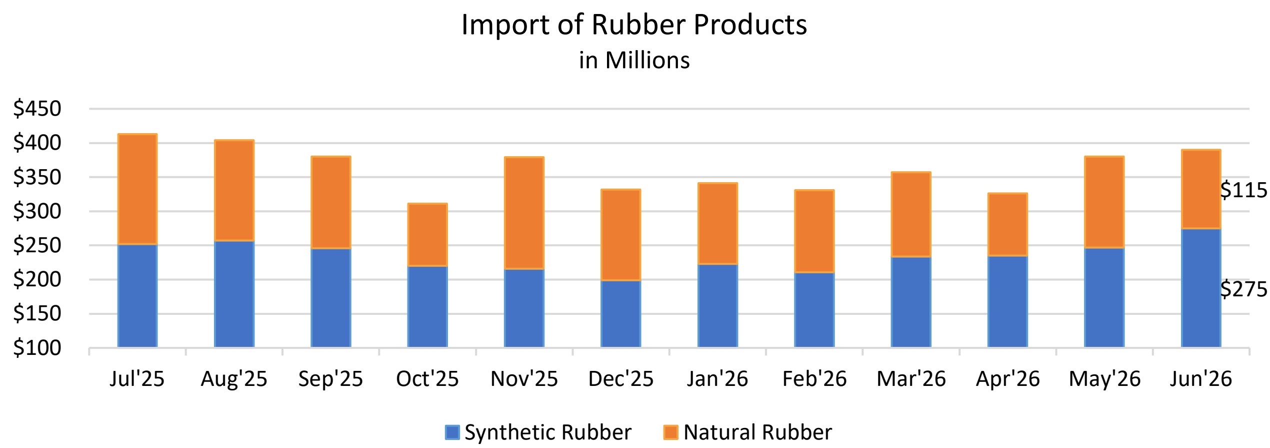
Total U.S. Container Imports

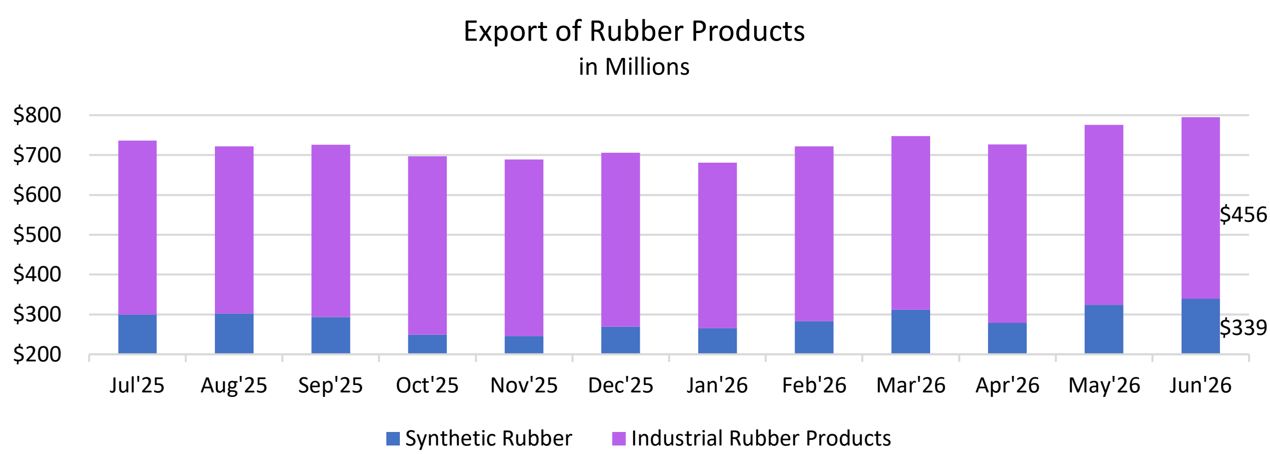


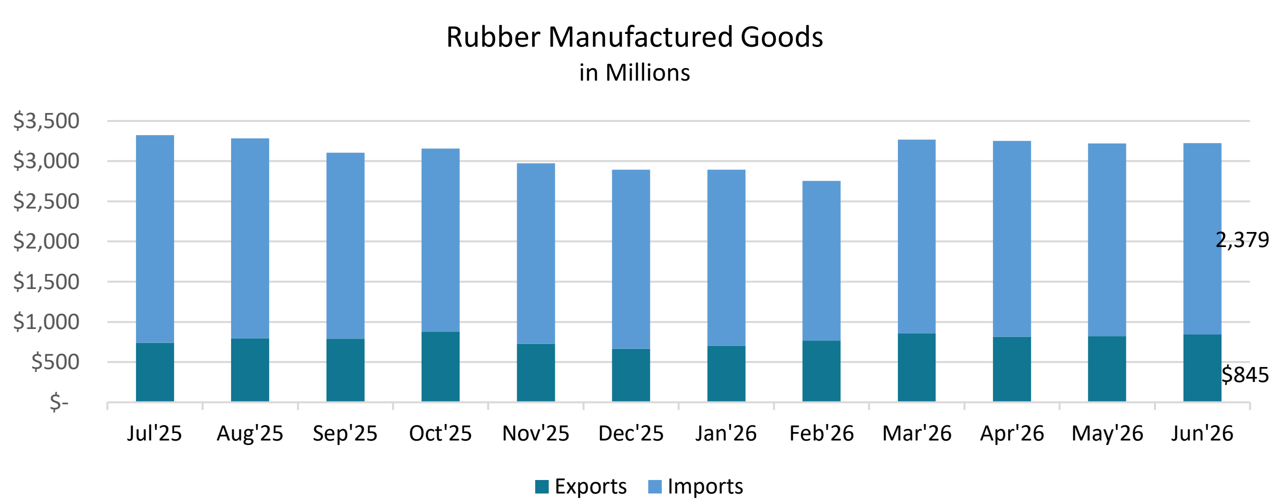
Key Takeaways:

- U.S. containerized imports remained stable in July, totaling 2.5 million twenty-foot equivalent units (TEUs).
- Following the typical seasonal month-over-month increase, volumes rose 4.5% from June and were 4.3% below the near-record level recorded in July 2025, which narrowly missed the overall record set in May 2022.
- Compared to pre-pandemic 2019, July 2026 imports were up 14.1%, underscoring the continued strength of U.S. import demand.
- China-origin imports rose to 873,129 TEUs in July, increasing 7.2% from June and reaching their highest monthly level since July 2025.
- China's share of total U.S. containerized imports increased to 34.8%, up from 33.9% in June, indicating that China captured a slightly larger portion of overall U.S. import activity.
- China’s July import mix continues to be led by industrial product categories, underscoring the ongoing importance of industrial equipment and manufacturing inputs from China to the U.S. economy.
- Through the first seven months of 2026, imports are down 0.9% YoY while remaining well above pre-pandemic levels.

U.S. Rubber Import & Export Stats







U.S. Industry Import Index

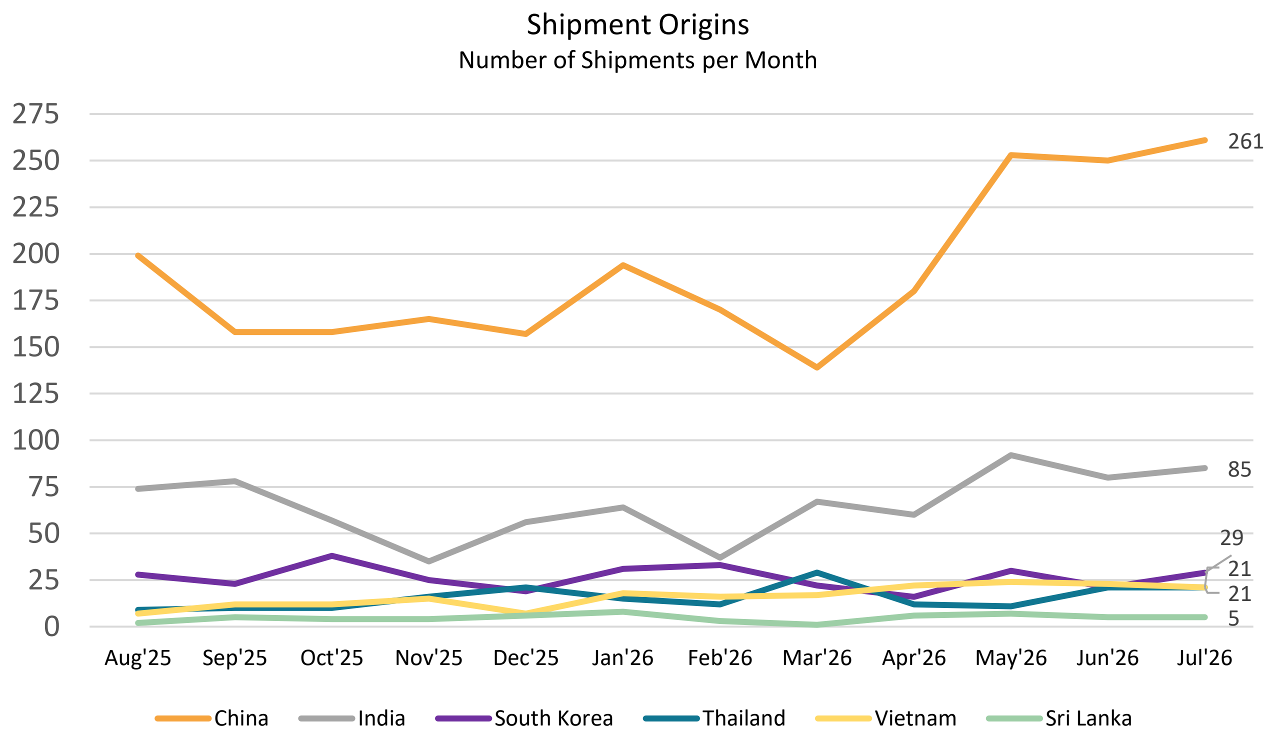
Institute for Supply Management (ISM®) Import Index						
Month	Percent Reporting	% Higher	% Same	% Lower	Net	Index
Jul 2026	85	16.0	79.4	4.6	+11.4	55.7
Jun 2026	86	12.5	80.7	6.8	+5.7	52.9
May 2026	85	15.4	75.2	9.4	+6.0	53.0
Apr 2026	85	10.6	79.3	10.1	+0.5	50.3
Mar 2026	87	15.1	75	9.9	+5.2	52.6
Feb 2026	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	(green)
Index under 50 means imports are decreasing	(red)

Key Takeaways:

- In July, the index rose to its highest reading of the year and the past 12 months, marking its seventh consecutive month of expansion.
- The nine industries that reported higher imports in July are: Paper Products; Transportation Equipment; Chemical Products; Miscellaneous Manufacturing; **Plastics & Rubber Products**; Computer & Electronic Products; Food, Beverage & Tobacco Products; Electrical Equipment, Appliances & Components; and Machinery.
- Nine industries reported unchanged imports in July compared to the previous month.
- No industries, reported lower import volumes in July.

U.S. Sheet Rubber Imports By Country



Key Takeaways:

- U.S. imports of Chinese sheet rubber increased 4.4% month-over-month (MoM) in July, reaching their highest monthly volume in the past 12 months. More importantly, Chinese imports have now remained at or above 250 containers for three consecutive months, suggesting the May surge was not simply a one-month spike. China's sustained strength reinforces its position as the dominant supplier to the U.S. sheet rubber market.

- U.S. imports of Indian sheet rubber increased modestly in July. Volumes remain elevated relative to most of late 2025 and early 2026, reinforcing India's position as the clear second-largest supplier behind China. The continued strength suggests India remains the primary diversification alternative for U.S. buyers.

- China and India's combined import share increased to 65.6% in July, up 1.7 percentage points from June.

Port Operations

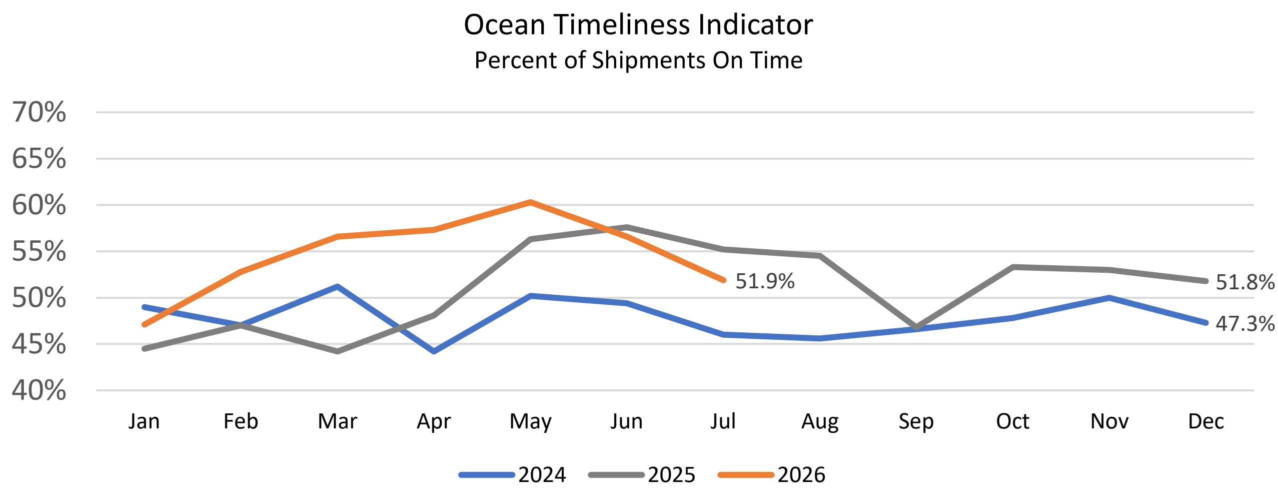
Current North America Vessel Dwell Times				
Region	Port	Vessels Waiting	Average Wait for Berth	Rail Dwell Times
U.S. West Coast	LA/LB	0	0 days	7 days
	OAK	1	0 days	4 days
	SEA/TAC	0	0 days	4 days
Canada West Coast	Van	5	4 days	5 days
	PRR	2	3 days	5 days
U.S. East Coast / Gulf Coast	NY/NJ	1	0 days	4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

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

Key Takeaways:

- In July transit times increased across most major U.S. gateways, in line with the heightened seasonal imports, while Los Angeles recorded a significant improvement.
- Rail service has resumed on key wildfire-affected corridors, but Canadian networks are still working through backlogs, railcar shortages, and residual congestion.
- Elevated rail dwell times and slower cargo movement are expected to remain in place for the weeks ahead as railroads restore network fluidity and clear accumulated freight volumes.
- The Panama Canal remains operational, but draft restrictions continue influencing vessel deployment and cargo allocation on some East Coast and Gulf Coast services. Some ocean carriers have implemented weight limitations on cargo and announced surcharges on affected services.
- The Indian Subcontinent remains one of the most capacity-constrained origins. Limited vessel allocations, equipment shortages at inland locations, carrier capacity control, and recent service changes continue putting pressure on exports bound for North America and Europe.

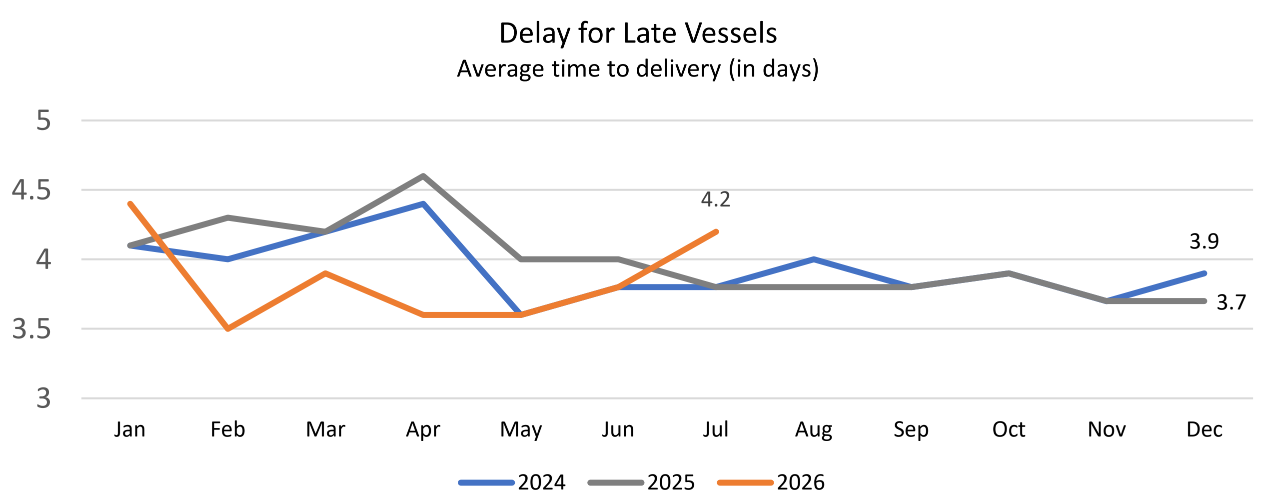
Global Ocean Freight Schedule Reliability



Key Takeaways:

- Global on-time performance fell to 51.9% in July, down 4.7 percentage points from June and the second lowest level recorded so far in 2026. While performance remained above July 2024 levels, it was below July 2025 and continues the downward trend following May's peak.

- Trade lane reliability softened across most corridors in July, with 16 of 18 trade lanes recording lower performance than in June. Asia-North America West Coast services fell to 57.2% from 62.5%, while Asia-North America East Coast services declined to 54.1% from 63.0%.

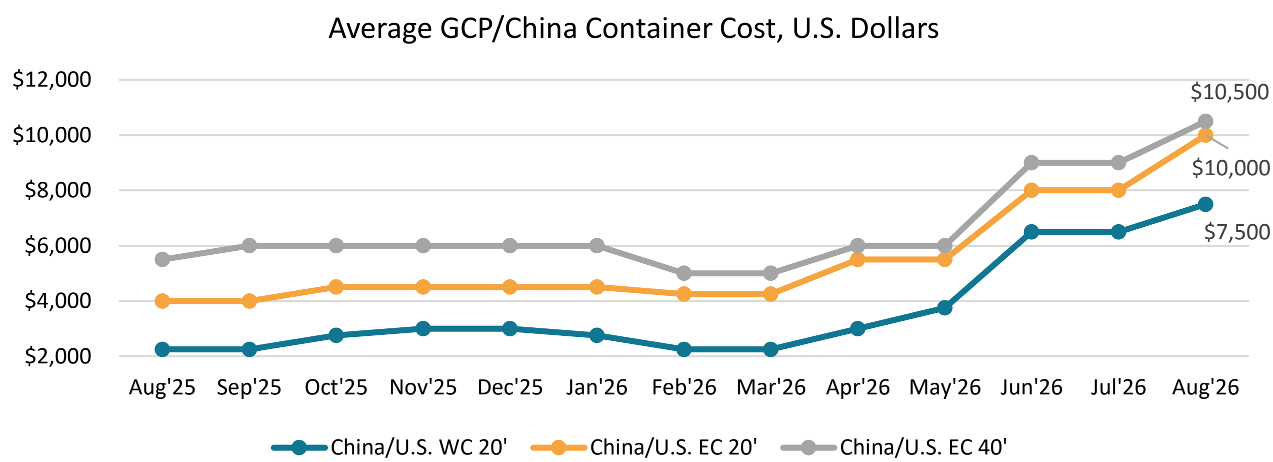


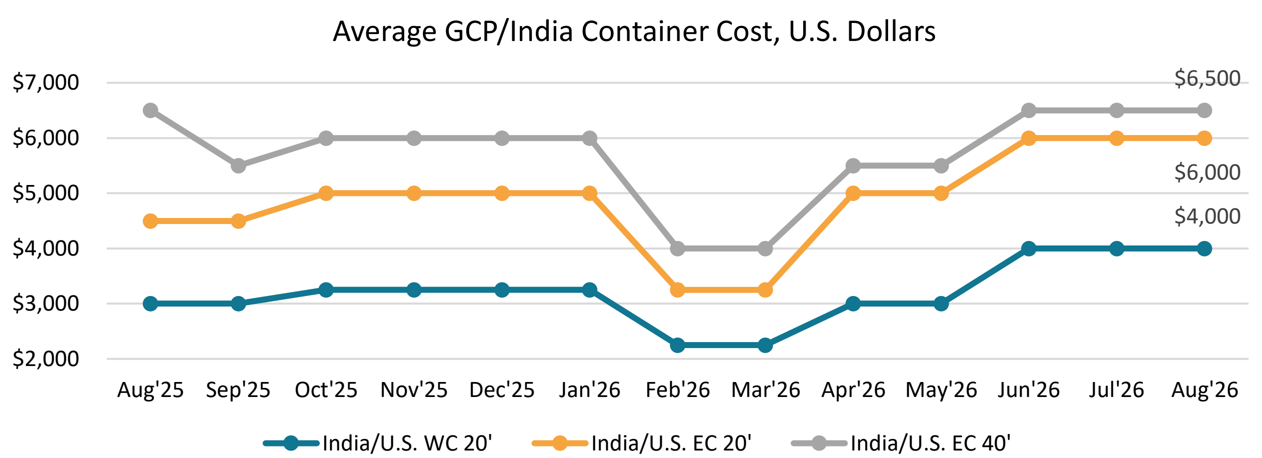
Key Takeaways:

- The overall decline in schedule reliability was accompanied by higher arrival delays. Average delay increased from 3.8 to 4.2 days for late vessels.

Ocean Freight Rates

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





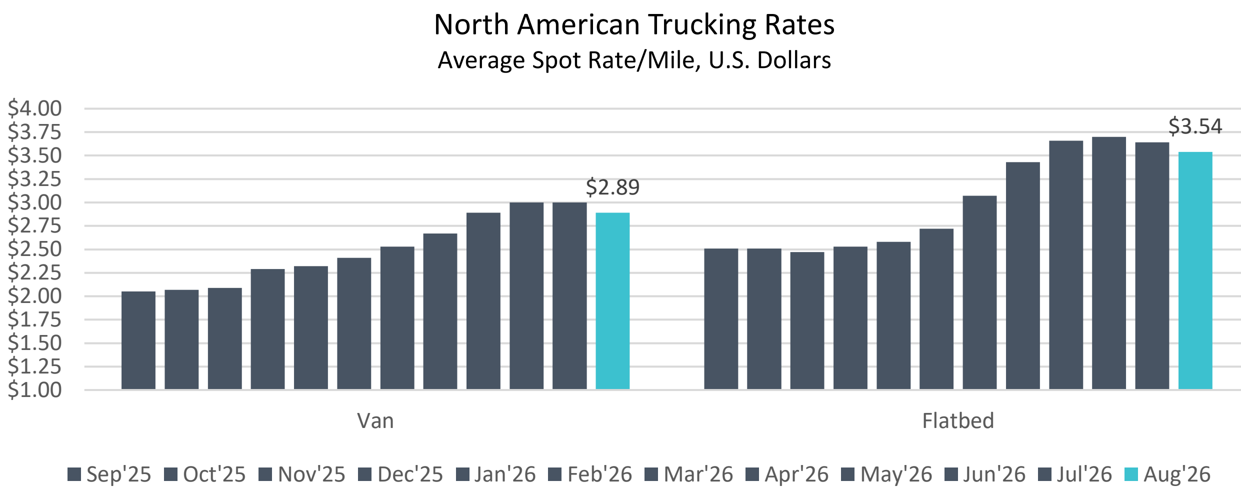
Key Takeaways:

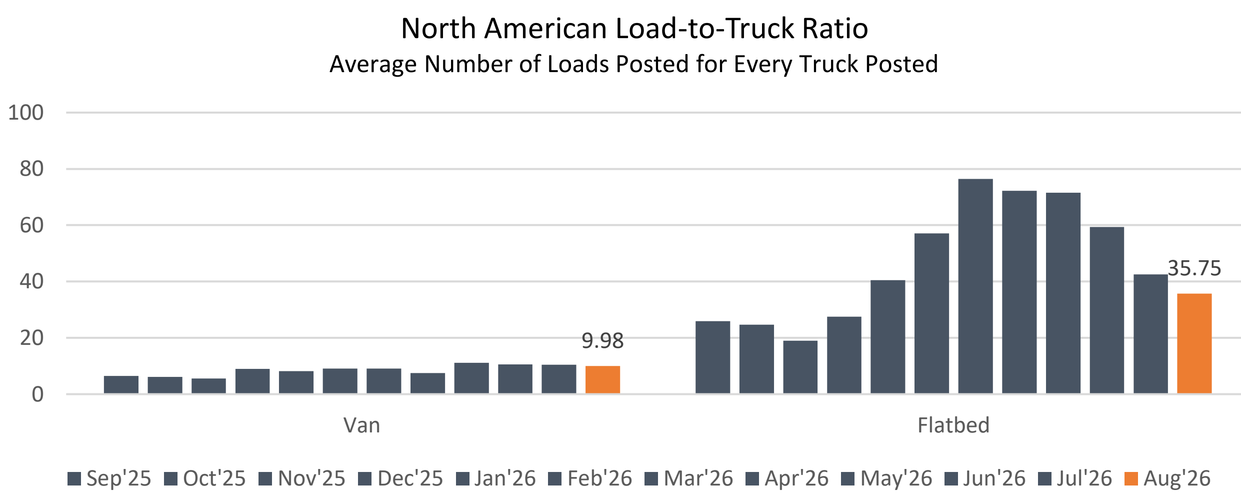
- Asia-to-U.S. spot rates continue to rise. The move is more supply-side than demand-driven as booking trends have remained elevated but consistent month over month. Carriers are adjusting Asia to U.S. service networks heading into September to better align capacity with current demand.

- Space to the U.S. West Coast has improved following additional carrier deployments, while East Coast and Gulf Coast capacity remains tight.

- Panama Canal restrictions, fuel surcharges, and weather disruptions in South China continue to impact costs and schedule reliability.

Truckload Shipping





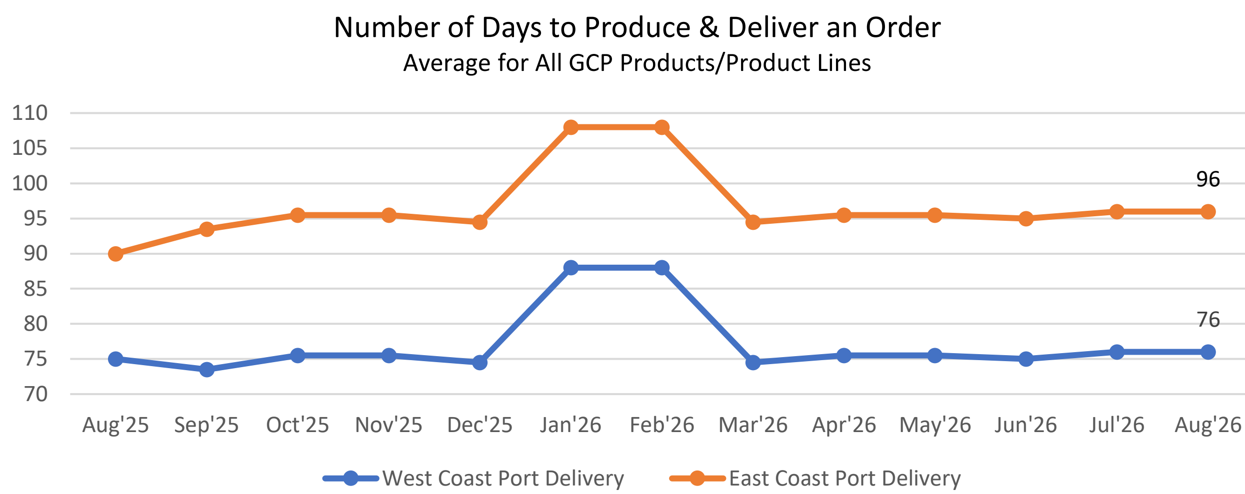
Key Takeaways:

- Spot rates moved lower in July and early August as peak season volatility faded and routing guide compliance improved, limiting spot market demand. Van rates saw the steepest decline, while flatbed followed a typical seasonal decline.

- The broader demand environment is likely to remain relatively stable but fragile through year-end. Imports will likely soften after an earlier than usual peak season, while greater use of intermodal may limit truckload volume growth.

- Taken together, these conditions point toward a relatively stable market amid a broad range of risks. Seasonal tightening could still create pockets of volatility through year-end, while any slowdown in demand would increase downside pressure on the spot rate 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 August 2026 production index. (View here)
- GCP production times stayed flat from July to August and remain broadly in line with production performance seen throughout most of the past year.

Resources

Tariffs Roundup

- https://www.bloomberg.com/news/articles/2026-08-24/bessent-pledges-to-isolate-iran-from-global-economy
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