INDUSTRIAL TRADE REPORT | September 2026

THRIVING IN UNCERTAINTY

It feels like something important may be changing. Businesses have demonstrated they are no longer waiting for trade conditions to return to normal. Instead, they are increasingly operating as though today's uncertainty is normal. Global manufacturing expanded again in August, every major industrial sector tracked by S&P Global reported growth, and U.S. container imports reached their third-highest monthly level on record. Supply chains are becoming more diversified, inventories are being repositioned and companies continue to move significant volumes of goods. All of this is happening despite raw material prices rising for 23 consecutive months, rubber costs increasing sharply across several grades, ocean freight remaining near peak-season levels, and global port congestion reaching record highs. The story therefore seems to be evolving beyond resilience. Rather than simply absorbing disruption, the industrial economy appears to be reorganizing around it.

By GCP Industrial Products

Executive Brief

September offers further evidence of an industrial economy that has become increasingly difficult to disrupt. Growth is not uniform and cost pressures remain significant, but manufacturing, trade, and import activity continue to perform at surprisingly strong levels given the challenges surrounding them.

- **Uncertainty is becoming part of the operating model -** Businesses continue to adjust supply chains, inventories and sourcing strategies rather than waiting for trade conditions to normalize.
- **Manufacturing strength is broadening -** Global manufacturing expanded further in August, with 20 of the 32 leading producing countries reporting increased output and all 21 monitored industrial sectors posting growth.
- **U.S. import demand remains remarkably strong -** August container imports reached 2.60 million TEUs, the third-highest monthly volume on record and 21.5% above August 2019 levels.
- **Supply chains continue to diversify -** Mexico and Taiwan are playing larger roles in U.S. trade, while India reached a 12-month high in U.S. sheet rubber shipments as companies continue to broaden sourcing beyond traditional channels.
- **Cost pressures are firmly embedded -** Raw material prices increased for the 23rd consecutive month, while several key rubber grades moved sharply higher in September.
- **Logistics remain functional, but increasingly uneven -** Global port congestion reached record absolute levels, schedule reliability remained near its weakest point of 2026, and transpacific freight rates stayed near peak-season highs.

Contents

Tariffs

Russia Sanction Bill

- The House of Representatives passed a bill handing the president power to hit up to 15 countries with tariffs as high as 100%.
- The bill is aimed at depleting Russia's ability to continue funding the war by targeting its natural gas and oil revenues, as well as countries that continue to buy Russian energy.
- On the energy-purchase side, the targets could include China, India, Turkey, Hungary, Slovakia, and the United Arab Emirates.
- This bill would also allow the president to levy tariffs of up to 500% on Russian-origin products.
- It's not guaranteed this bill will result in new duties. A similar Russian-oil-related authority was invoked once before under the International Emergency Economic Powers Act (IEEPA), and only one country, India, ended up with a tariff, set at 25% at the time.

U.S./China

- The U.S./China trade relationship has entered a more cautious phase following the severe tariff escalation of 2025. Rather than another round of broad tariff increases, Washington and Beijing are currently focused on maintaining their fragile trade truce and negotiating targeted reductions in tariffs and other trade barriers.
- President Xi arrived in the U.S. on September 23 for a three-day visit, his first U.S. visit in more than a decade. Trade, technology, AI, critical minerals and other strategic issues are on the agenda.
- Following several days of high-level negotiations between U.S. Treasury Secretary Scott Bessent, U.S. Trade Representative Jamieson Greer and Chinese Vice Premier He Lifeng, the immediate focus is the meeting between Trump and Xi on September 24.
- A key development so far has been the discussion of reciprocal tariff reductions covering approximately US$30 billion of goods on each side. China has indicated that it hopes to reach an agreement on these reductions at an early date.
- The current trade truce remains an important element of the negotiations. On September 23, Secretary Bessent indicated that Washington was open both to extending the existing truce and to pursuing a broader trade agreement.

Raw Material Pricing

Institute for Supply Management (ISM®) Price Index					
Month	Prices Higher	Prices Same	Prices Lower	Net	Index
Aug 2026	46.2%	49.8%	4.0%	+42.2	71.1
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
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 71.1% in August, the same as in July, indicating raw materials prices increased for the 23rd straight month.

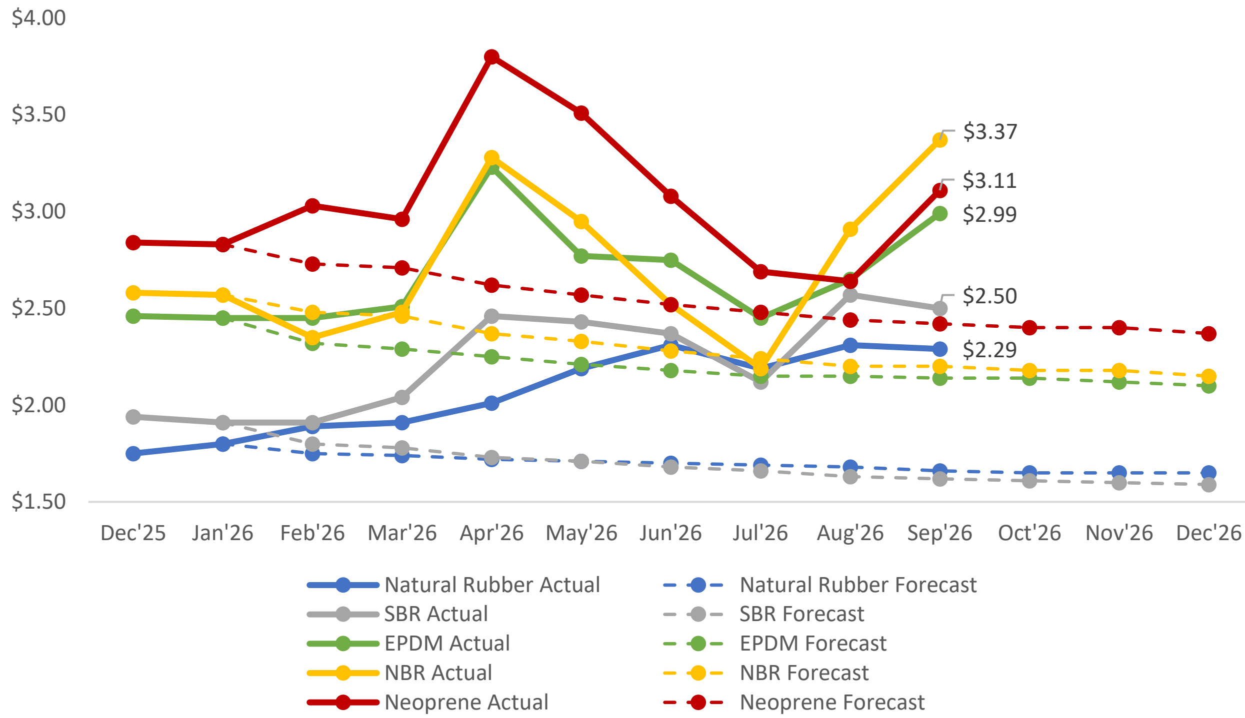
- There has been no change to the key factors driving price increases: (1) increases in steel and aluminum prices affecting the entire value chain; (2) tariffs imposed on a broad range of imported goods; and (3) increases in petroleum-based product costs resulting from the ongoing conflict in the Middle East.

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

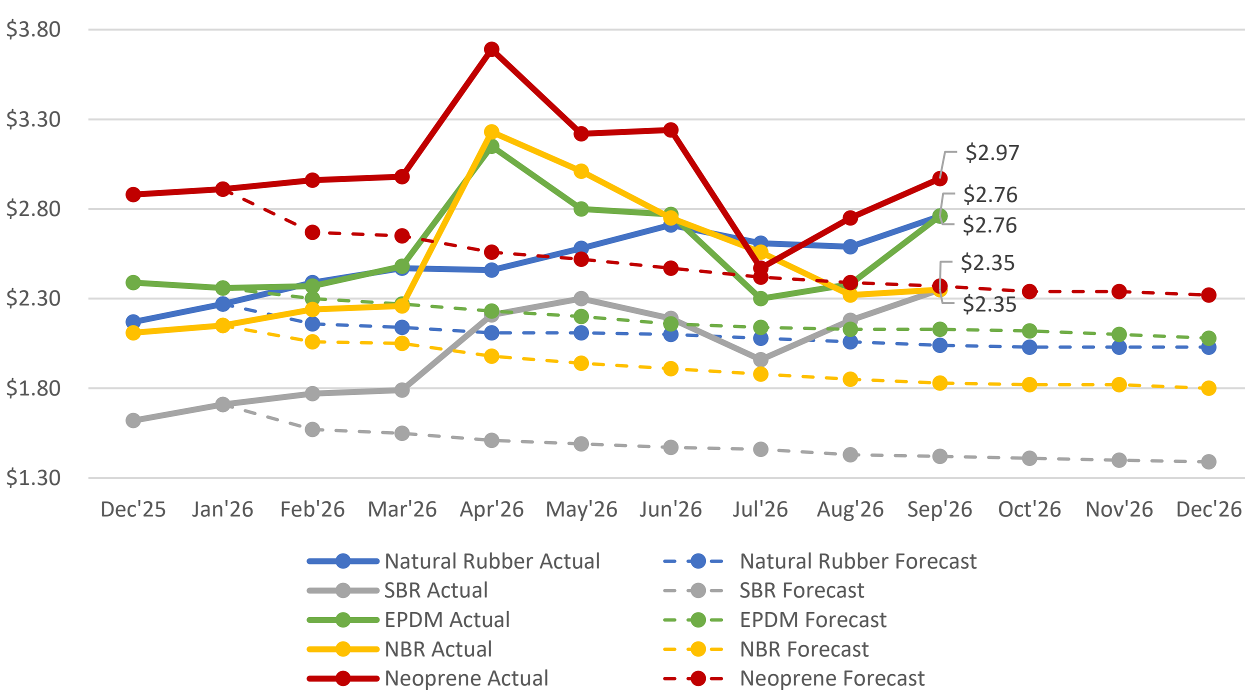
- No industries reported paying decreased prices for raw materials in August.

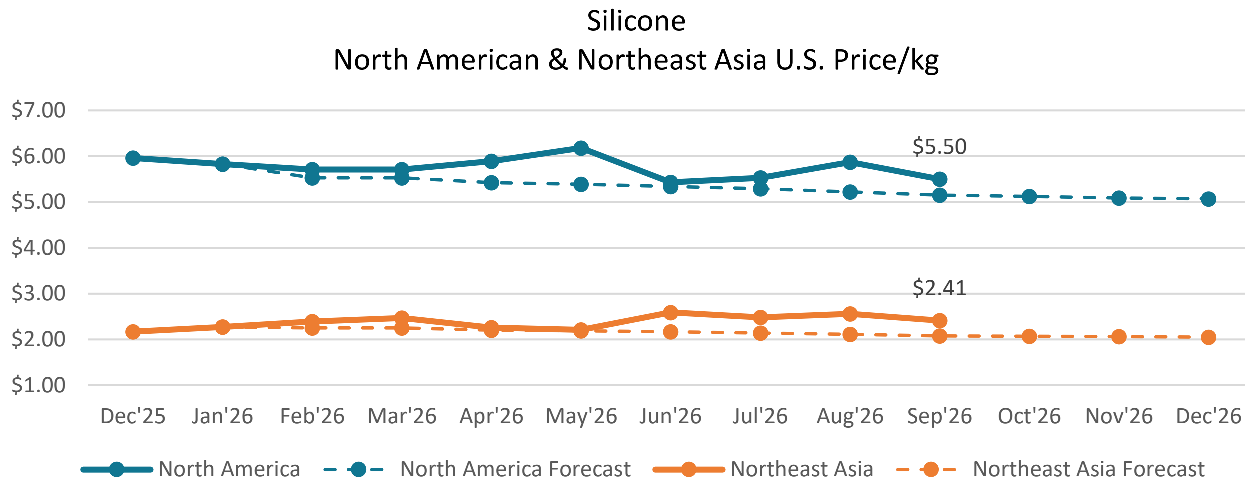
Rubber Pricing

North American U.S. Price/kg



Northeast Asia U.S. Price/kg





Month-Over-Month Change:

Natural Rubber
North America: US$2.29/kg, down $0.02
Northeast Asia: US$2.17/kg, up $0.17

SBR
North America: US$2.50/kg, down $0.07
Northeast Asia: US$2.35/kg, up $0.17

EPDM
North America: US$2.99/kg, up $0.34
Northeast Asia: US$2.76/kg, up $0.38

NBR
North America: US$3.37/kg, up $0.46
Northeast Asia: US$2.35/kg, up $0.03

Neoprene
North America: US$3.11/kg, up $0.47
Northeast Asia: US$2.97/kg, up $0.22

Silicone
North America: US$5.50/kg, down $0.37
Northeast Asia: US$2.41/kg, down $0.15

September Summary:

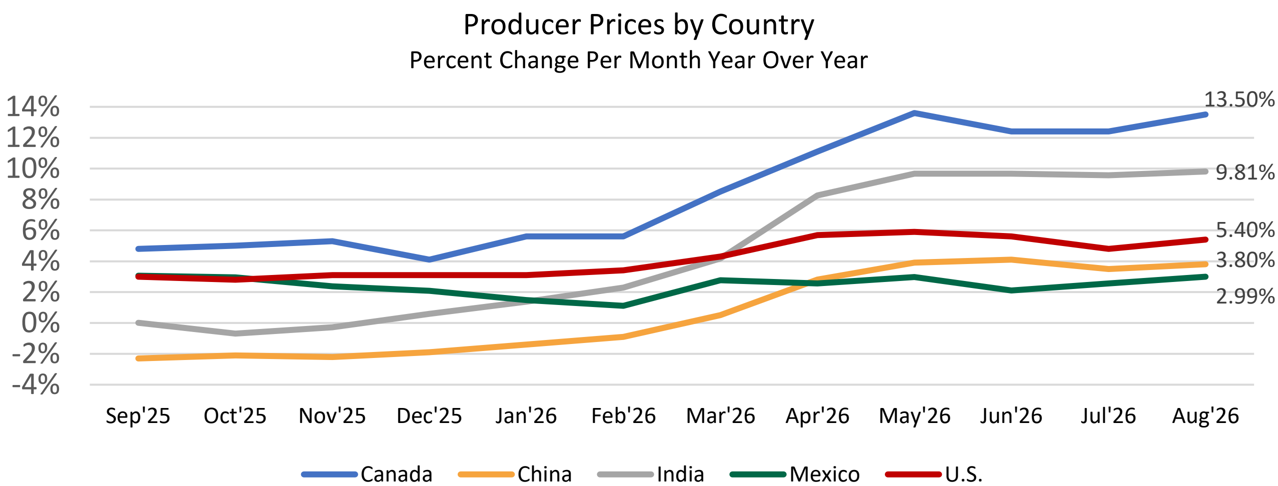
- Global natural rubber prices reached a 13-year high in early September at 249 U.S. cents per kg but have since eased to just below 240 U.S. cents per kg.

- The increase was partly supported by rising oil prices amid the Middle East fragile ceasefire and the ongoing closure of the Strait of Hormuz.

- More recently, however, softer demand from China has weighed on prices, as lower tire production has reduced raw-rubber purchases. In addition, some manufacturers are planning holiday closures ahead of China’s National Day and Mid-Autumn Festival, which further dampened near-term demand.

- Lastly, crude oil prices have declined since the beginning of the month, lowering synthetic rubber costs and making it a more cost-competitive alternative to natural rubber.

Producer Prices By Country



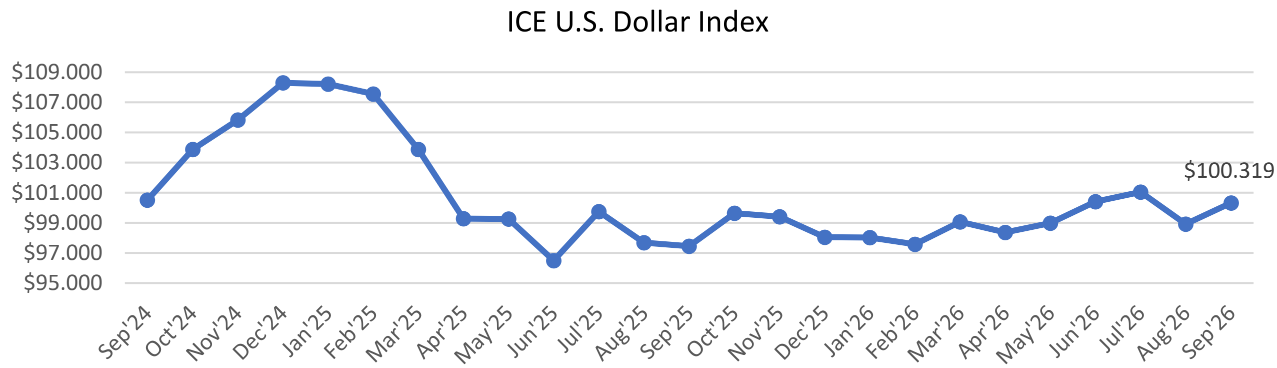
Key Takeaways:

- U.S. producer prices increased 5.4% versus a year ago, with more than half of the increase attributable to higher energy prices. Further upstream in the supply chain, prices for unprocessed and processed intermediate goods rose 1.8% and 1.1%, respectively. Nearly 60% of the increase in unprocessed intermediate goods was driven by industrial inputs that are neither food nor fuel, such as metal scrap and construction materials. Overall, producer prices are up 5.4% over the past year, double the increase recorded during the 12 months ending in August 2025.

- China's producer inflation accelerated to 3.8% YoY in August, up from July's three-month low, as energy prices continued to rise amid global oil supply disruptions related to the Strait of Hormuz. Inflation in production materials also accelerated to 5.0%, from 4.8% in July, driven by faster price increases in mining (17.8% vs. 16.4%) and raw materials (6.7% vs. 6.1%). For the first eight months of the year, producer prices rose 2.0% YoY, accelerating from the 1.8% increase recorded in the previous period.

- India's producer prices reached an all-time high of 9.81% in August, driven by increases in manufacturing, mineral oil, crude petroleum, and natural gas prices. Within manufacturing, the largest increases were recorded in chemicals and chemical products (14.30%), textiles (12.63%), rubber and plastics (11.18%), and basic metals (10.88%).

Foreign Exchange



Key Takeaways:

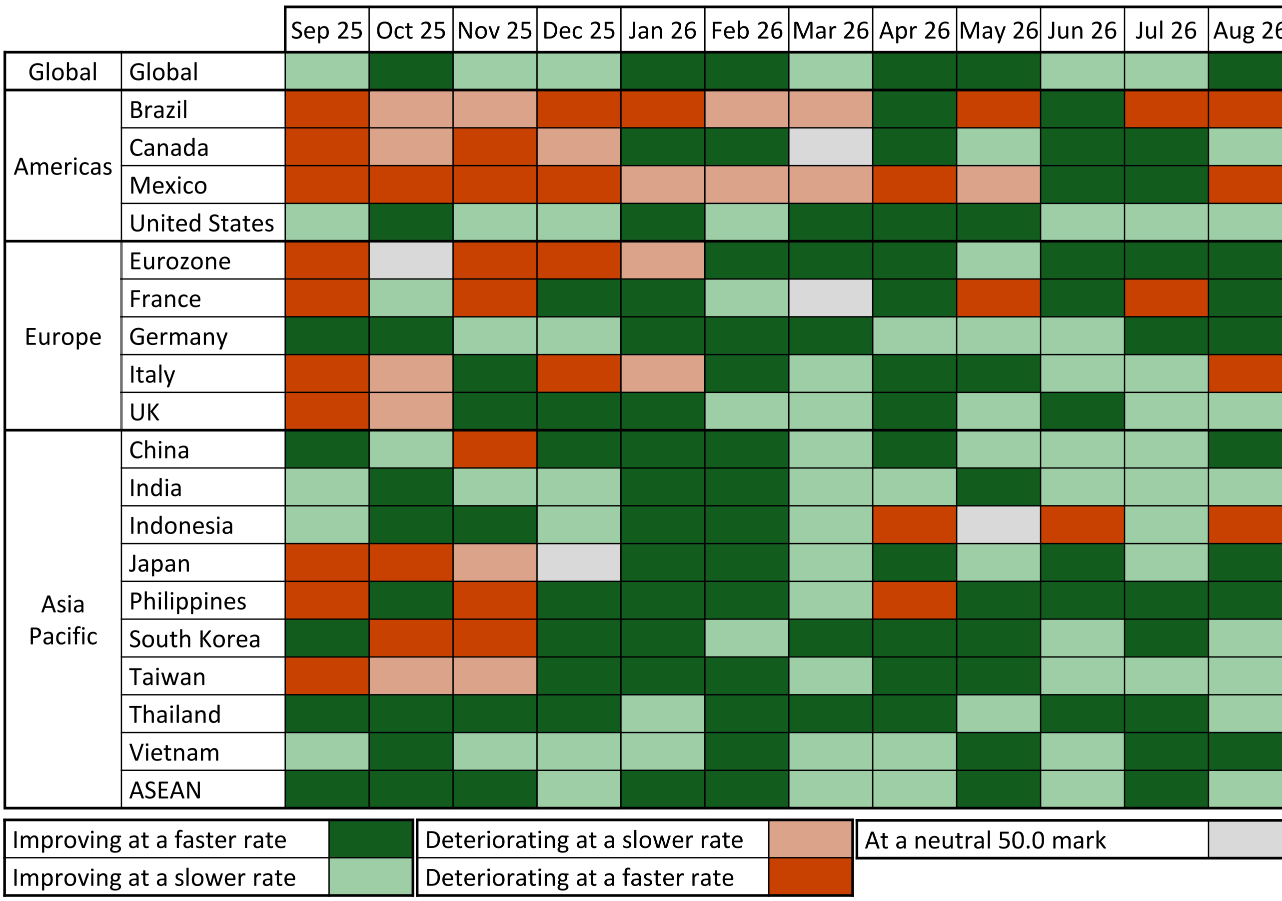
- The ICE U.S. Dollar Index (DXY) is a benchmark measuring the value of the USD against a basket of six major currencies (EUR, JPY, GBP, CAD, SEK, CHF). It serves as a key indicator for the currency's strength.
- A weaker U.S. dollar generally makes it more expensive for businesses to import goods from 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 is reclaiming its bullish momentum, hovering firmly above the 100 level and recently touching a seven-week high near 100.67.
- The strength is primarily supported by the Federal Reserve's hawkish stance, including its quarter-point hike in mid-September, alongside rising Treasury yields and persistent core inflation expectations. Meanwhile, easing crude oil prices, driven by improved expectations around Middle Eastern oil supply, have provided some relief from inflationary pressures.
- In the short term, analysts expect the index to retest late-July resistance zones between 101.5 and 101.8 if macroeconomic data continues to support another quarter-point hike before year-end.

Global PMI Manufacturing Heatmap

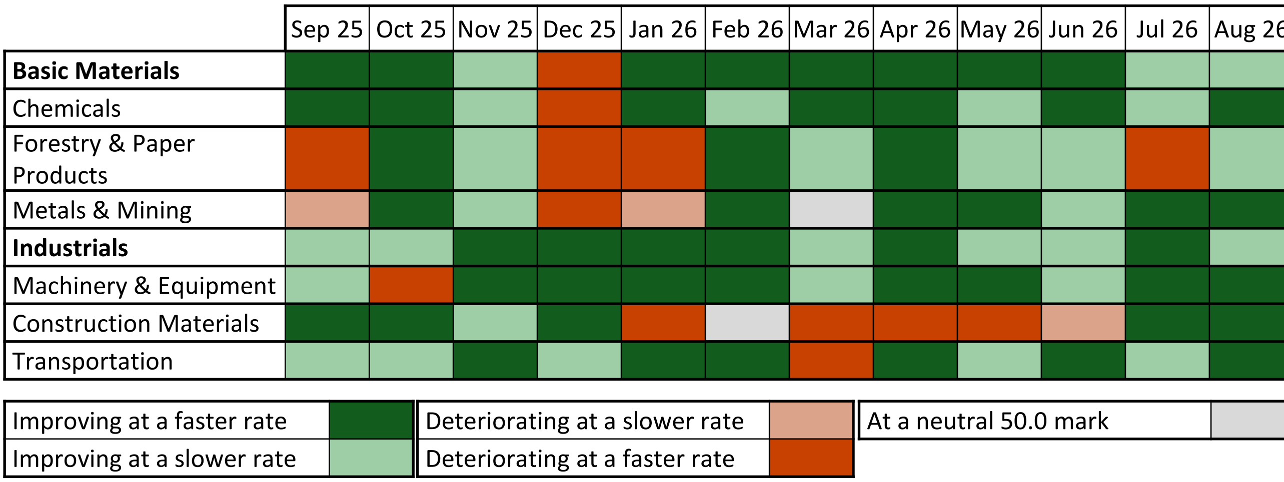
Included components for calculating the manufacturing conditions of each country are: Production output, new orders, new export orders, backlogs of work, employment, input prices, output prices, future expectations, quantity of purchases, suppliers' delivery times, stocks of purchases, stocks of finished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



Key Takeaways:

- Global manufacturing production increased again in August with expansions of output seen in 20 out of the 32 nations for which data was available.
- Among the larger industrial regions covered by the survey, growth was registered in mainland China, the U.S., the Euro Zone and Japan.
- Recent export growth has been driven by a combination of U.S. inventory building and price hedging, as businesses seek to buffer against supply bottlenecks and concerns stemming from the conflict in the Middle East.

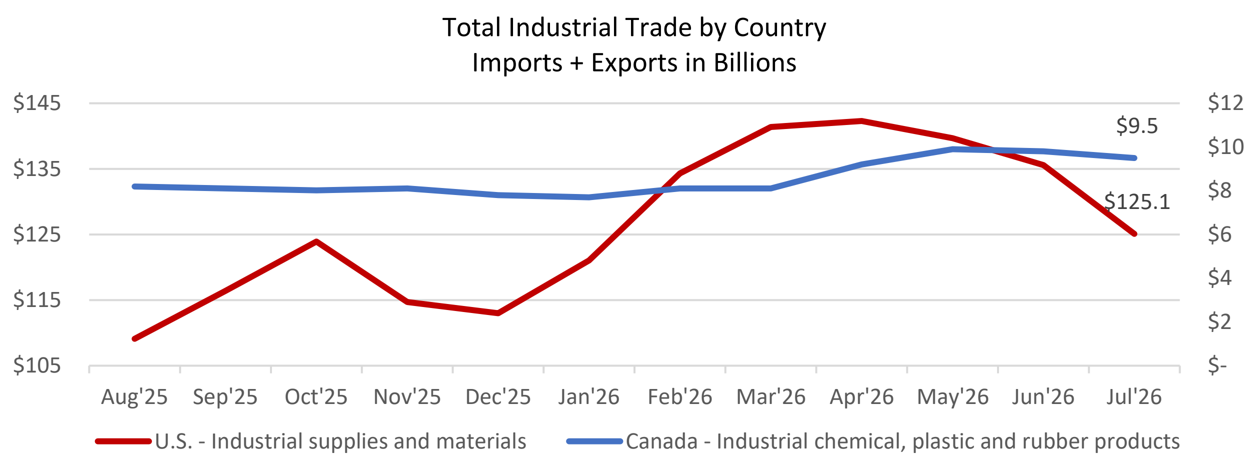
Global Sectors Heatmap



Key Takeaways:

- All 21 monitored sectors indicated an expansion in output in August, according to latest S&P Global Sector PMI® data.
- Growth resumed in the Forestry & Paper Products sector, though it was only marginal.
- Machinery & Equipment faced the steepest cost pressures of the 21 monitored sectors.
- In contrast, the Basic Materials and Industrials categories lost some momentum after business activity growth reached a six-month high in July. August data nonetheless pointed to solid increases in production volumes across both sectors, although the pace of expansion remained softer than the average recorded in the second quarter of 2026.

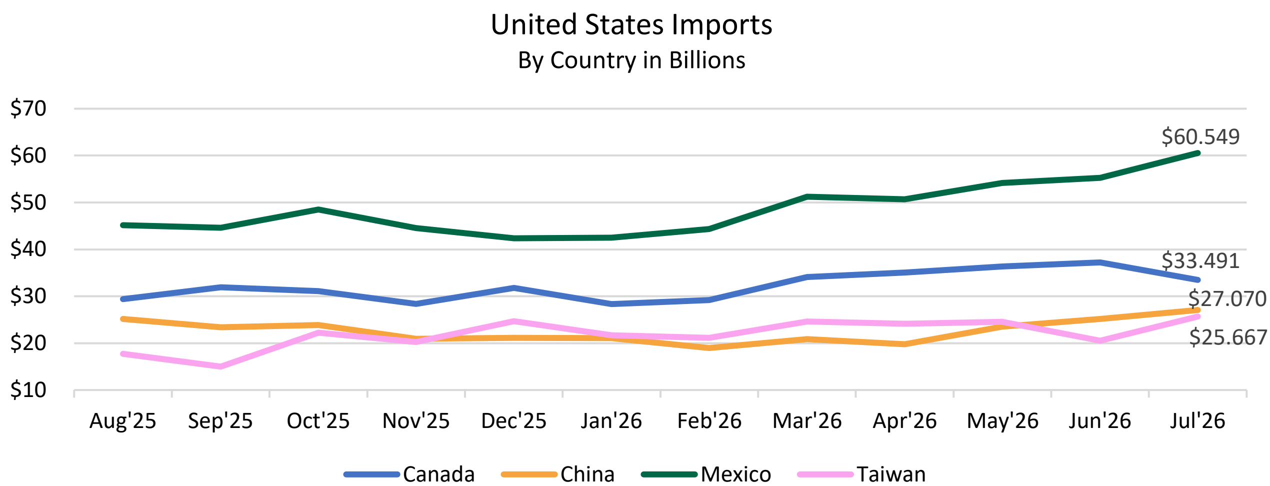
Total Trade Volume



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.
- Overall, trade volumes remain resilient but are showing more uneven momentum, with import demand strengthening while export growth softened across both economies.
- Specific to industrial trade, momentum weakened more noticeably in July, particularly in the U.S., where industrial exports fell by $8.7 billion during the month and imports declined by a further $1.8 billion. Canada's industrial chemical, plastic and rubber trade softened more modestly and remains near its year-to-date high.

Total U.S. Imports By Country



Key Takeaways:

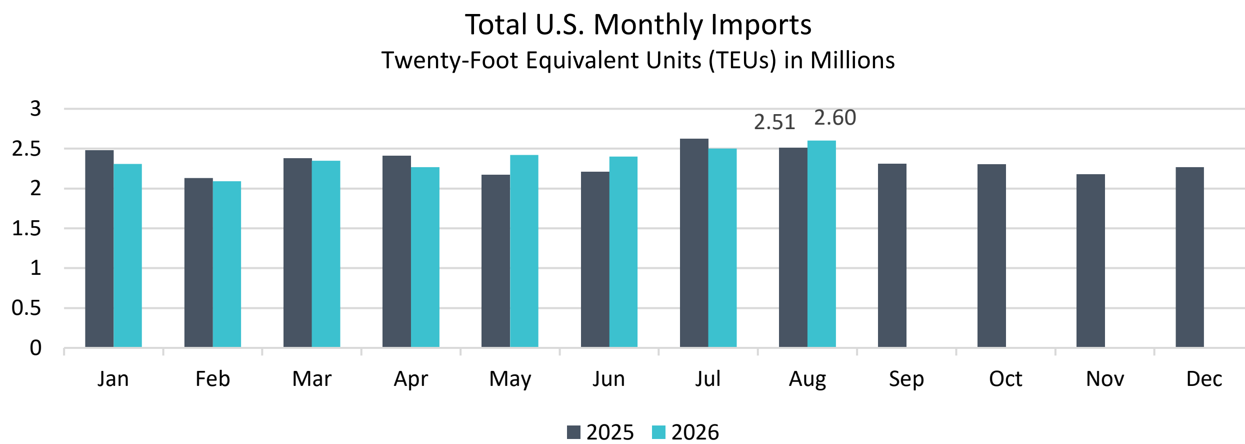
- Mexico was the clear standout in July, with U.S. imports surging to a record $60.5 billion, up 9.6% from June and approximately 33.6% from July 2025. Through the first seven months of 2026, U.S. imports from Mexico reached $358.7 billion, roughly 17% above the same period last year. July's Mexican import total is the highest on record, reinforcing Mexico's expanding role within U.S. supply chains. The sustained YoY growth suggests the shift toward North American sourcing remains a significant structural feature of U.S. trade.

- By contrast, U.S. imports from Canada declined to $33.5 billion in July, down 10.0% from June, interrupting five consecutive months of increases. Despite the monthly decline, imports remained approximately 4% above July 2025 levels. Canada remains deeply integrated into U.S. industrial supply chains, but the coming months will provide a clearer picture around the impact of higher tariffs on trade flows and whether July’s decline marks the beginning of a broader weakening in U.S.-Canada trade.

- U.S. imports from China increased to $27.1 billion in July, up 7.6% from June, representing the fourth consecutive monthly increase since April. July imports were also slightly above the $26.4 billion recorded in July 2025, indicating that Chinese shipments have recovered considerably from their early-2026 lows.

- U.S. imports from Taiwan rebounded sharply to a record $25.7 billion in July, up 25.1% from June and nearly 31.7% from July 2025. Even more striking is the year-to-date comparison: imports reached $162.3 billion through July, approximately 60% above the same period in 2025. Taiwan's rapid YoY growth underscores its increasingly important position within U.S. technology and advanced-manufacturing supply chains.

Total U.S. Container Imports



Key Takeaways:

- It appeared as if May would be the busiest month of 2026 as companies brought in goods early ahead of potential increases in tariffs. But high import levels have continued, stretching out the peak season to its traditional timing of late summer and early fall.

- In August, U.S. containerized imports reached 2,603,709 twenty-foot equivalent units (TEUs), the third-highest monthly volume on record, behind only May 2022 and July 2025.

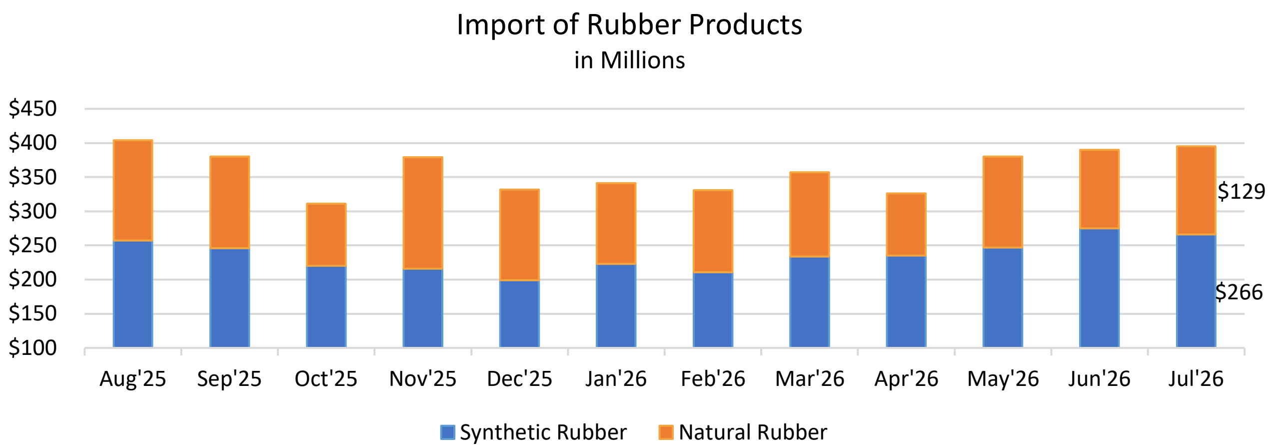
- August imports were also 3.3% higher than in August 2025 and 21.5% above August 2019, underscoring the continued strength of U.S. import demand.

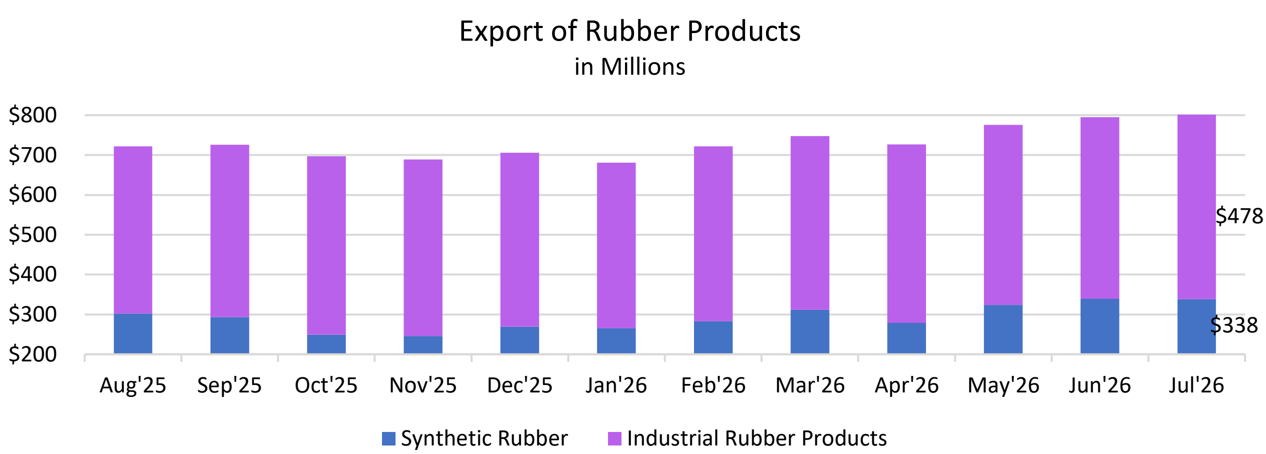
- Container imports from China totaled 884,318 TEUs in August, increasing 1.3% from July and 1.7% from August 2025. Additionally, China represented 34.0% of total U.S. container imports in August, down slightly from 34.8% in July.

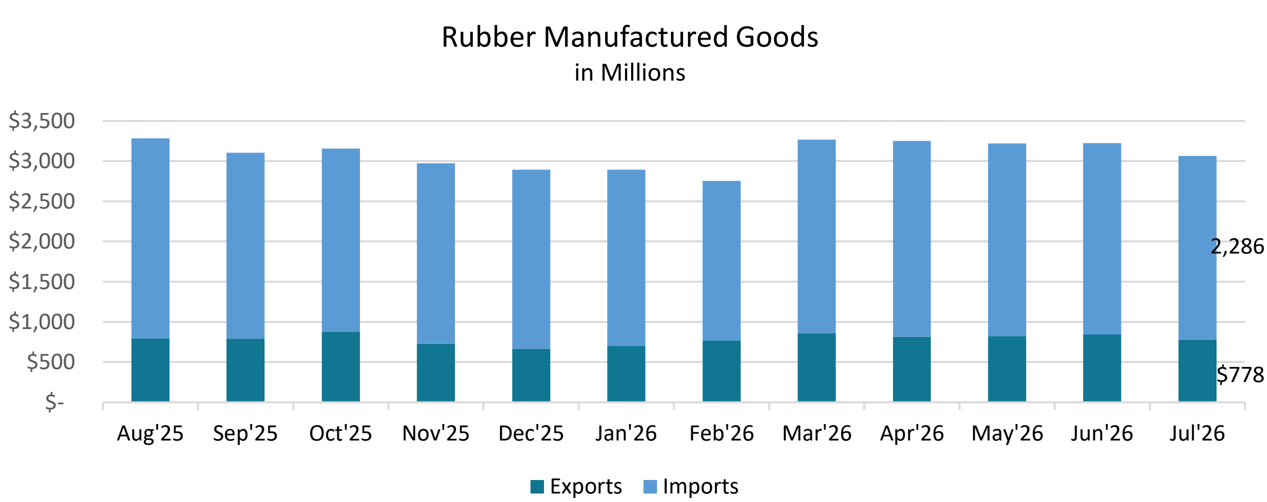
- Imports have remained buoyant over the past three months despite several hurdles, including vessel delays, tariff increases, inflation and higher fuel prices.

- Through the first eight months of 2026, import volumes were 0.4% below the same period in 2025, narrowing the year-to-date gap.

U.S. Rubber Import & Export Stats







U.S. Industry Import Index

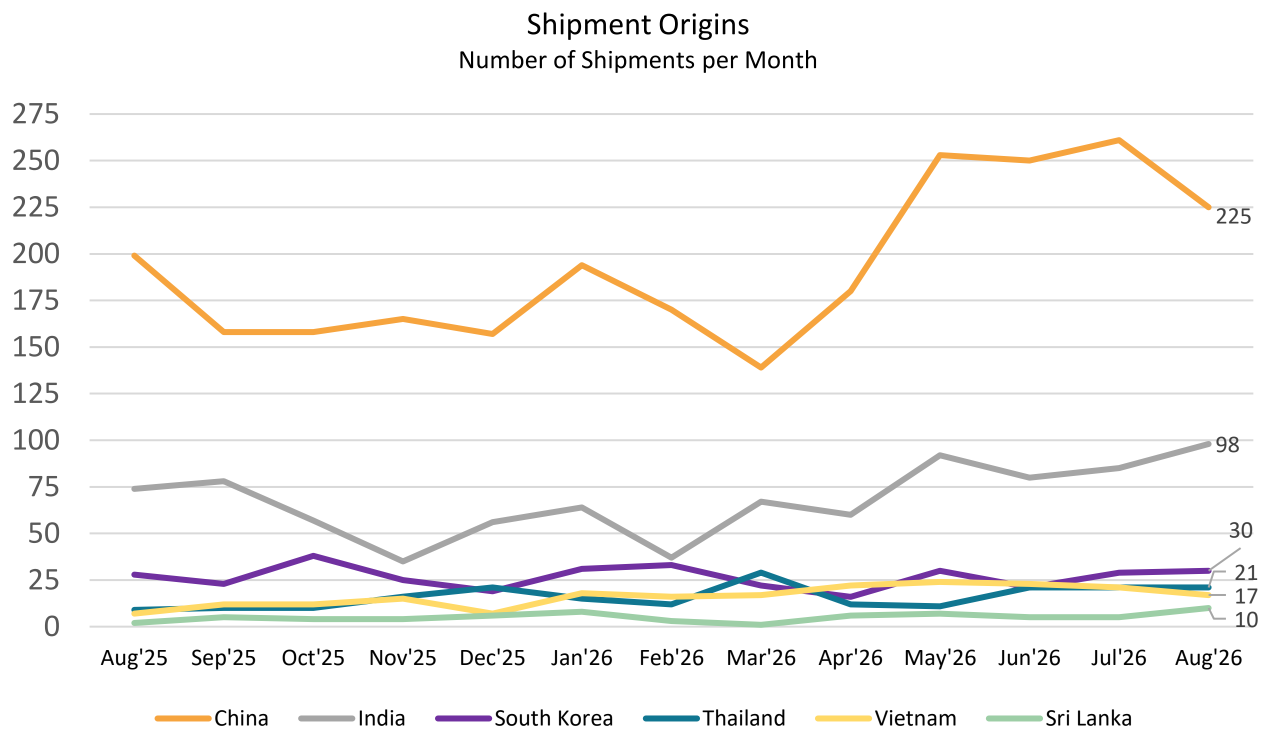
Institute for Supply Management (ISM®) Import Index						
Month	Percent Reporting	% Higher	% Same	% Lower	Net	Index
Aug 2026	85	10.1	84.7	5.2	+4.9	52.5
Jul 2026	85	16.0	79.4	4.6	+11.4	55.7
Jun 2026	86	12.5	80.7	6.8	+5.7	52.9
May 2026	85	15.4	75.2	9.4	+6.0	53.0
Apr 2026	85	10.6	79.3	10.1	+0.5	50.3
Mar 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	
Index under 50 means imports are decreasing	

Key Takeaways:

- In August, the index shrank 3.2 percentage points but remained in expansion territory, marking its eighth consecutive month of import growth.
- The seven industries that reported higher imports in August are: Textile Mills; Transportation Equipment; Electrical Equipment, Appliances & Components; **Plastics & Rubber Products**; Machinery; Food, Beverage & Tobacco Products; and Chemical Products.
- The three industries that reported lower volumes in August are: Fabricated Metal Products; Computer & Electronic Products; and Miscellaneous Manufacturing.
- Eight industries reported no change in imports in August compared to July.

U.S. Sheet Rubber Imports By Country



Key Takeaways:

- U.S. imports of Chinese sheet rubber declined 13.8% month-over-month. Despite the pullback, volumes remained above August 2025 levels and relatively strong compared with much of the past year. After three consecutive months at or above 250 containers, August suggests some moderation in Chinese sourcing, although China remains by far the largest supplier of sheet rubber to the U.S. market.

- On the other hand, U.S. imports of Indian sheet rubber increased 15.3% MoM and reached the highest level over the past year. India continues to strengthen its position as the primary diversification alternative to China and in August accounted for a more meaningful share of U.S. sheet rubber imports.

- China and India's combined share of imports declined by 5 percentage points to 60.6%, marking the lowest level since April.

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	2	0 days	8 days
	OAK	1	0 days	7 days
	SEA/TAC	0	0 days	5 days
Canada West Coast	Van	1	4 days	5 days
	PRR	2	1 day	6 days
U.S. East Coast / Gulf Coast	NY/NJ	3	0 days	4 days
	BAL	7	0 days	2 days
	NOR	4	0 days	4 days
	CHS	0	1 day	2 days
	SAV	7	1 day	4 days
	HOU	0	3 days	9 days

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

Key Takeaways:

- Global port congestion has reached record levels, with more than 4.3 million TEUs of vessel capacity waiting to berth. That is above the absolute volume seen during the pandemic-era disruption, although the share of the larger global fleet affected is lower than the 2022 peak.

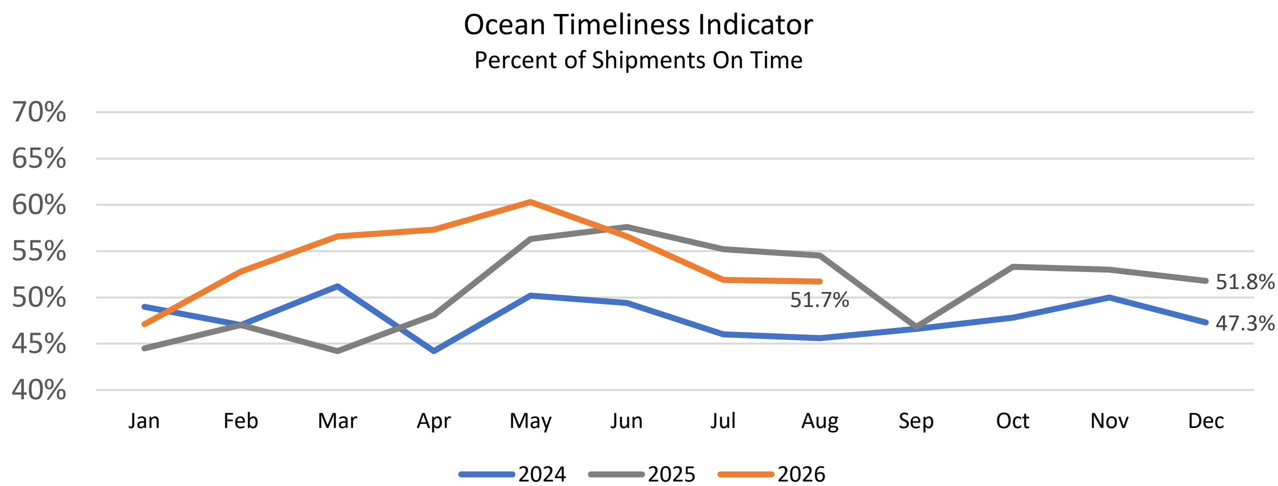
- Over the past several weeks, China's export network has been affected by repeated weather disruption, including typhoon activity across eastern and southern China. These events have placed pressure on major port regions, vessel rotations, feeder services and trucking corridors.

- Major U.S. gateways remain broadly stable, but localized issues continue to create differences in inland execution. Current conditions do not point to a broad-based issue, although equipment and appointments can tighten quickly, leading to worsening terminal-specific congestion.

- Performance differences among gateways are becoming more visible because ports and inland networks are operating under different constraints. A shipment may clear its vessel and terminal on schedule but lose time during the next leg of its journey.

- A lower transportation rate may not produce the lowest total cost if the route repeatedly exposes cargo to missed cutoffs, storage, detention, or delayed delivery.

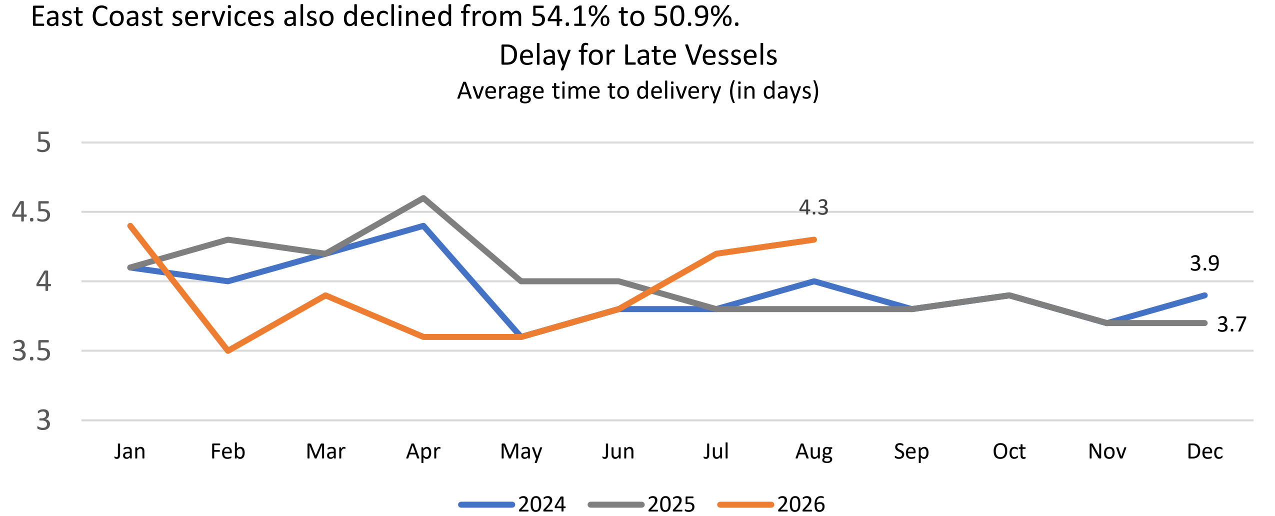
Global Ocean Freight Schedule Reliability



Key Takeaways:

- Global schedule reliability remained stable at 51.7% in August, following the steep decline recorded in previous months. Performance was 5.1 percentage points below August 2025 but remained above August 2024. With no evident recovery, reliability remained at its weakest level for 2026.

- Trade-lane performance was mixed in August, with nine of the 20 corridors improving. Asia-North America West Coast services fell again from 57.2% to 51.3%, while Asia-North America East Coast services also declined from 54.1% to 50.9%.

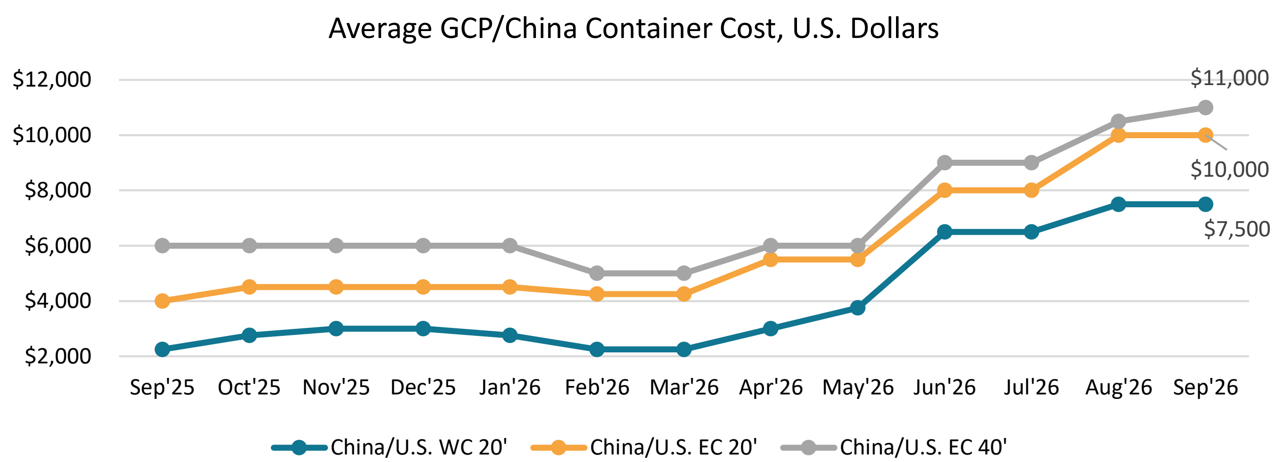


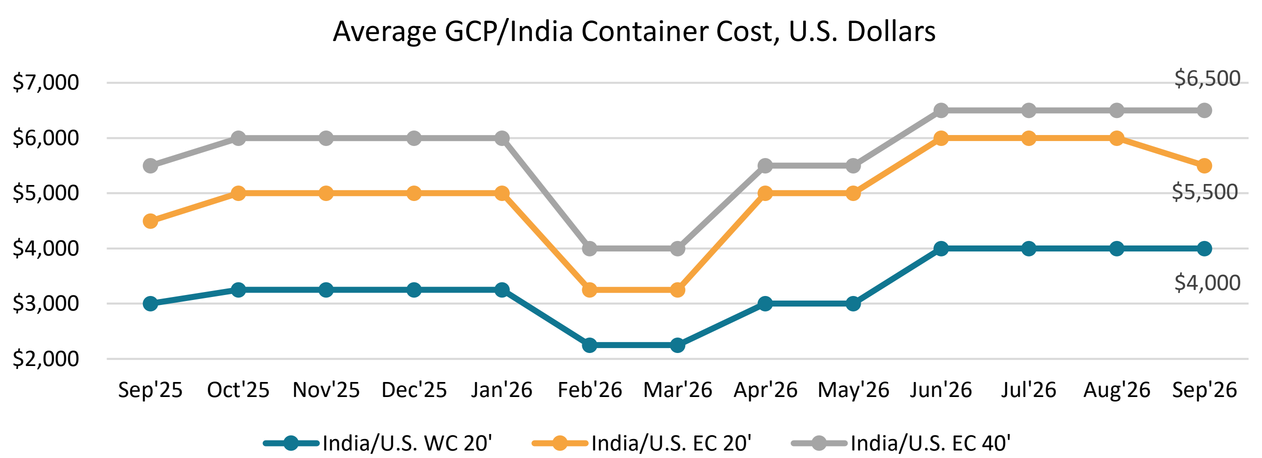
Key Takeaways:

- The overall decline in schedule reliability was accompanied by higher arrival delays. Average delay increased slightly from 4.2 to 4.3 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.





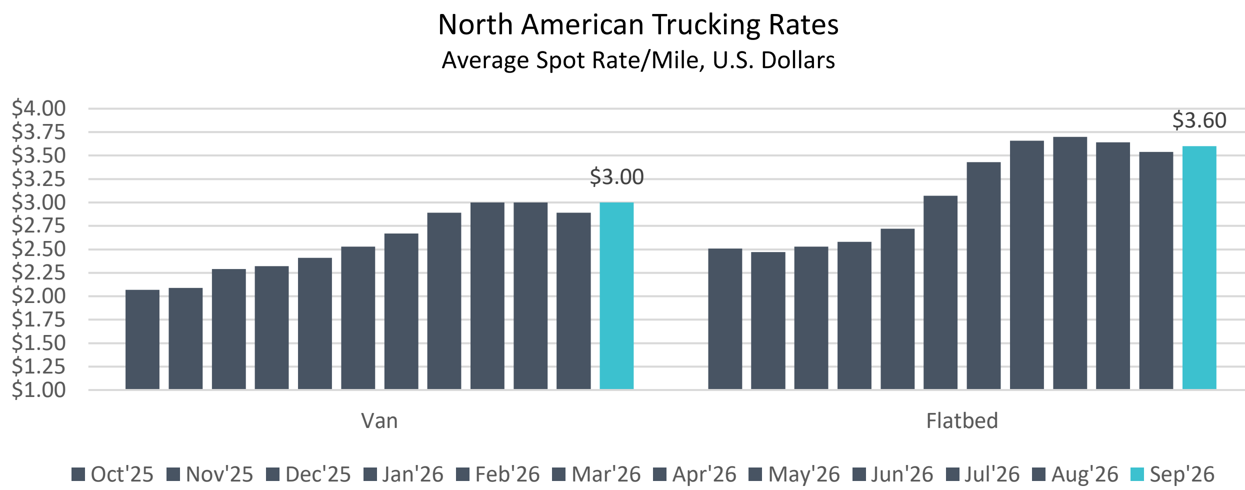
Key Takeaways:

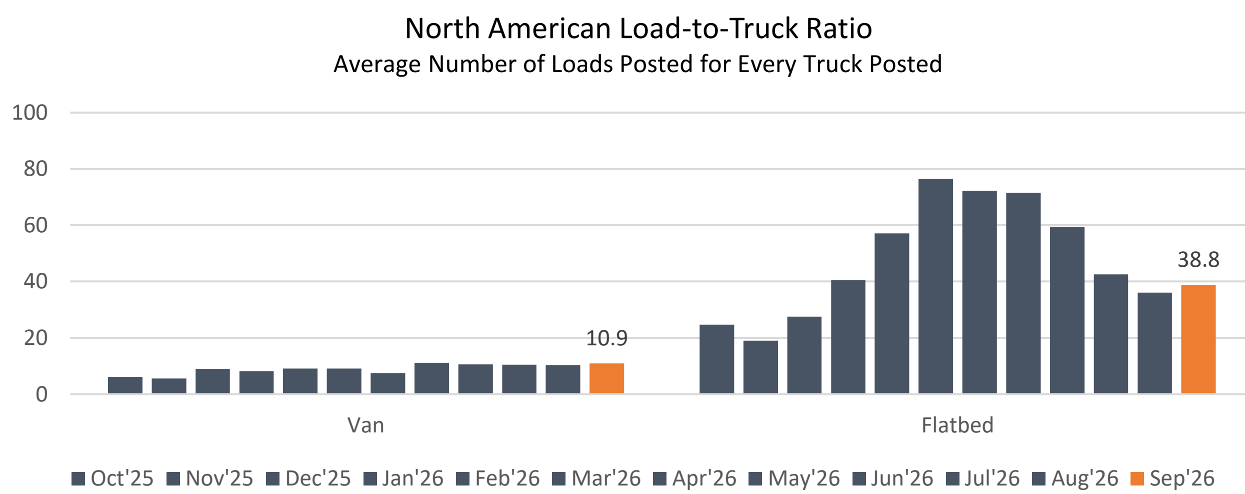
- Despite an early start to the ocean peak season in May, which drove container rates sharply higher into the summer, transpacific rates have remained near peak-season levels.

- Resilient transpacific demand, plus a pre–Golden Week shipping push, port congestion, blanked sailings, and weather disruptions are all combining to keep container rates at year-to-date highs.

- Some indices are projecting rates could approach COVID pandemic-era highs. However, transpacific rates peaked at more than $20,000/FEU, driven by unprecedented demand and severe port congestion. At that time, carriers were able to apply significant premium surcharges to secure capacity and move shipments. The current market dynamics are materially different.

Truckload Shipping



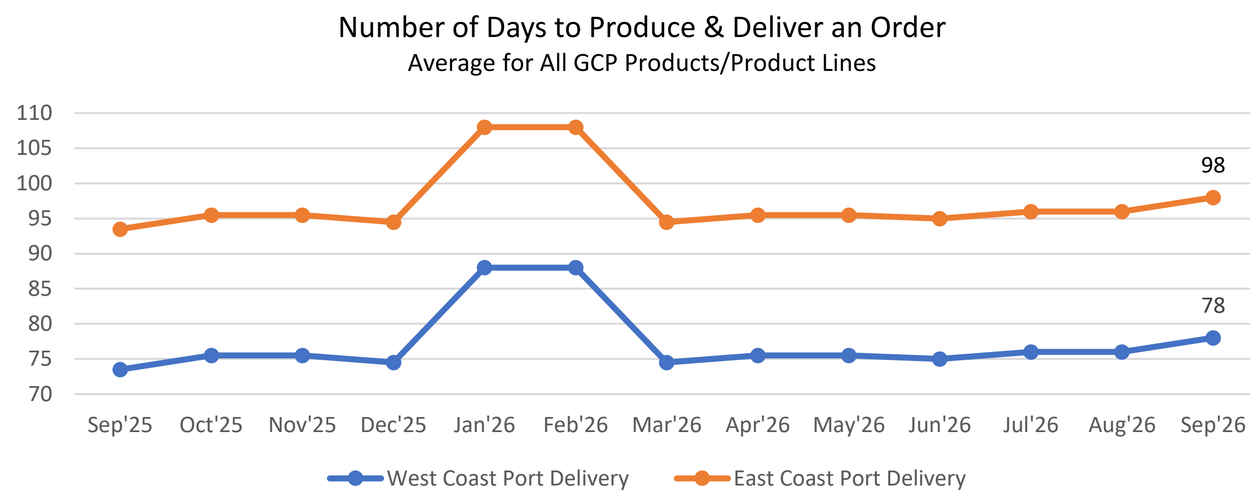


Key Takeaways:

- Spot linehaul rates moved lower from July into August as summer peak pressure faded and routing guide performance improved. Late-August and Labor Day disruptions briefly pushed van pricing higher, but those gains faded quickly, leaving September levels roughly in line with August and below summer peaks.

- Fuel volatility should continue to put upward pressure on all-in rates. However, linehaul rates should see limited movement from current levels in the near term, with strong routing guide compliance and softer demand limiting any sustained increases between now and the start of the Q4 holiday push.

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 14 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 current 2026 production index. (View here)

- GCP production times have slowly ticked up since June due to stricter environmental enforcement regulations in China, as well as supply chain disruptions for critical chemical additives that have created temporary bottlenecks in the manufacturing pipeline.

Resources

Tariffs Roundup

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