



INDUSTRIAL TRADE REPORT | October 2026

UNSTOPPABLE?

As we enter the final quarter of 2026, the global industrial economy continues to hum along. Manufacturing activity is accelerating, international trade remains strong, and U.S. container imports reached record September levels. Yet, as has been the case throughout the year, a different tune is playing beneath this momentum. Raw material inflation is intensifying, transportation costs remain elevated, and supply chains are becoming increasingly difficult and expensive to navigate. What makes this environment particularly interesting is that these pressures have yet to meaningfully derail industrial growth. Businesses continue to produce, purchase, and invest despite the pressures surrounding them. Perhaps the most revealing development is not the persistence of these challenges, but how little they appear to be slowing the industrial economy.

Executive Brief

October reinforces a remarkable trend in the global industrial economy. Manufacturing activity is accelerating, trade volumes remain strong, and import demand continues to defy expectations, even as inflation, tariffs, and supply chain pressures continue to intensify. Rather than slowing under the weight of these challenges, industrial activity continues to power through as we enter the final quarter of 2026.

- **Manufacturing Momentum Accelerates** - Global economic activity accelerated for the sixth consecutive month in September, with manufacturing output reaching its strongest level outside the post-pandemic recovery since 2018. All monitored industrial sectors reported expanding output, reinforcing the breadth of the current industrial recovery.
- **Trade Demand Remains Strong** - U.S. container imports reached 2.55 million TEUs in September, the highest September volume on record. North American trade activity also strengthened, with U.S. imports from Mexico reaching a new monthly high and Canadian shipments rebounding.
- **Inflation Pressures Intensify** - Raw material prices have climbed for 24 consecutive months, while producer price inflation is accelerating across several major manufacturing economies, intensifying pressure on industrial margins and procurement costs.
- **Supply Chains Remain Strained** - Global ocean freight reliability remains near 52%, while port congestion, elevated transportation costs, and capacity restrictions continue to complicate international logistics. Despite strong trade volumes, supply chain efficiency has yet to demonstrate meaningful improvement.
- **Trade Policy Uncertainty Persists** - U.S./Canada negotiations have renewed hopes for targeted tariff relief, while the extension of the U.S./China trade truce provides a bit of breathing room.

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Tariffs

U.S./Canada

- The White House announced additions and removals to the list of products covered by Section 338 tariffs. Certain plywood, paper packaging, refrigeration equipment and machinery are being removed, while specified paper products, valves, carpets and other goods are being added.
- The U.S. and Canada are actively discussing a possible agreement to reduce tariffs, particularly on steel and automobiles. The talks have gained momentum after breaking down in August, but there is no publicly confirmed, finalized agreement yet.
- The most important distinction is that the current negotiations appear to be focused on targeted tariff relief, not necessarily a comprehensive settlement of the trade dispute or a resolution of every issue under the Canada–United States–Mexico Agreement (CUSMA, known in the U.S. as USMCA).

U.S./China

- In late September, U.S. and Chinese officials agreed to extend their trade truce beyond its November 10 expiry, to January 10, 2027. This postpones a potential return to higher tariffs while both sides pursue a broader agreement.
- The U.S./China Board of Trade (established in September) is considering reciprocal tariff reductions for selected U.S. goods entering China and Chinese goods entering the U.S. The proposed lists cover approximately \$30 billion in goods on each side; the framework does not itself mean all listed goods already qualify for lower duties.
- The ongoing negotiations include Chinese purchases of U.S. agricultural products and deliveries of rare-earth materials and magnets. U.S. officials have indicated that implementation of some commitments remains incomplete. The unresolved issues remain important to the broader U.S.-China trade agreement.
- In early October, the U.S. Trade Representative (USTR) updated five China-related Section 301 product exclusions (three pump parts, plastic articles and machinery parts) to reflect changes in U.S. tariff classification codes. U.S. Customs began applying the updated guidance on October 23.

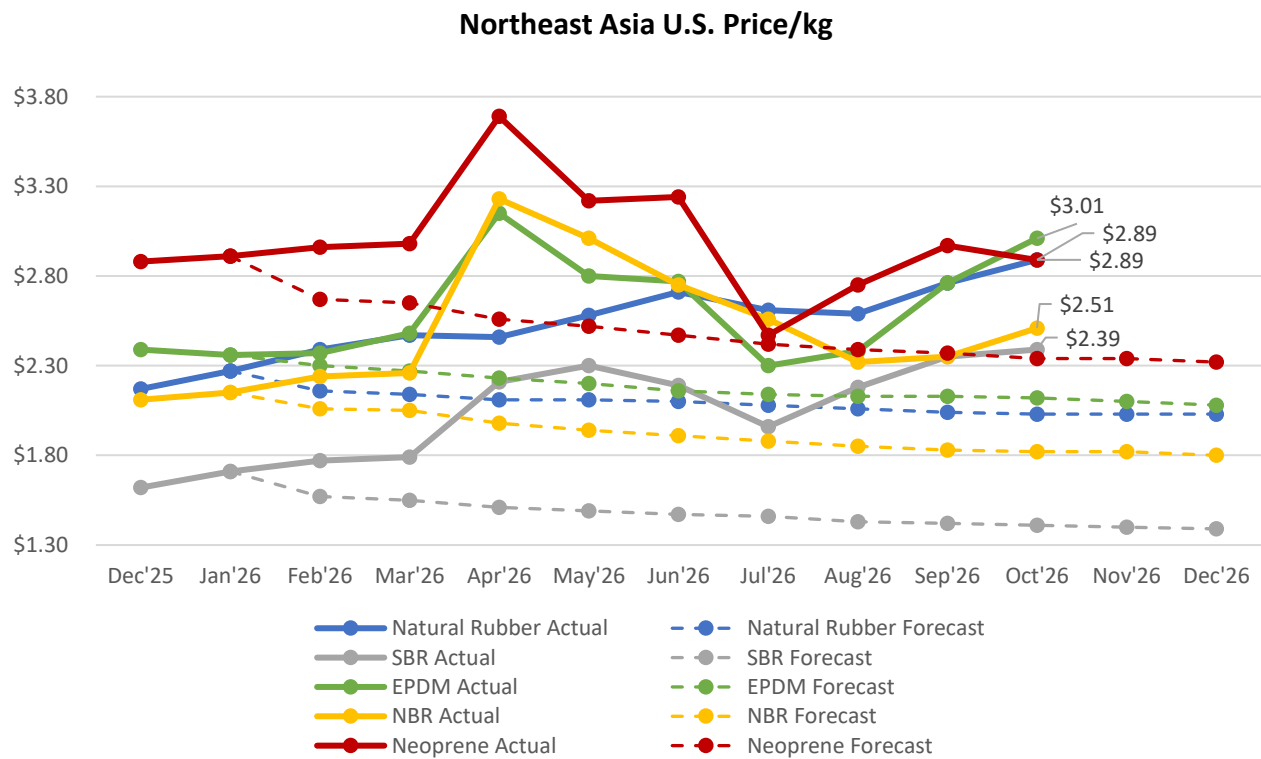
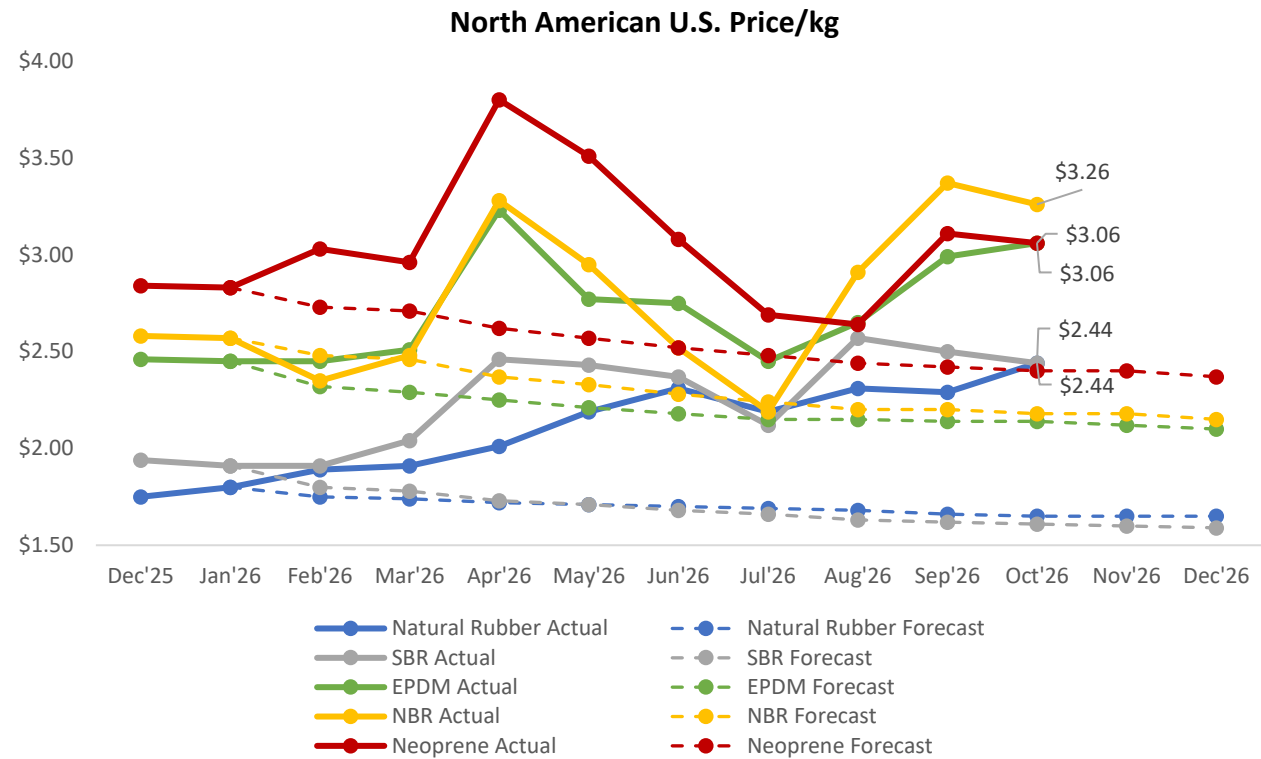
Raw Material Pricing

Institute for Supply Management (ISM®) Price Index					
Month	Prices Higher	Prices Same	Prices Lower	Net	Index
Sep 2026	58.6%	38.6%	2.8%	+55.8	77.9
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
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:

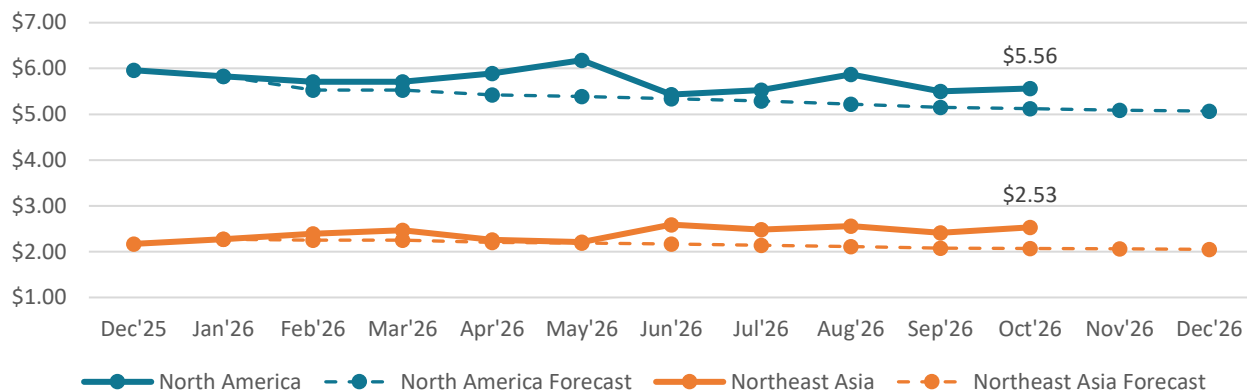
- The ISM® Prices Index rose 6.8 percentage points to 77.9 in September, approaching the 78.3 reading recorded in March at the onset of the Iran war. The latest reading also marks the 24th consecutive month of rising raw material prices.
- The Prices Index reading is still being driven by (1) increases 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 as a result of the Middle East conflict.
- In September, 16 of 18 industries reported paying increased prices for raw materials: Petroleum & Coal Products; Textile Mills; Wood Products; Fabricated Metal Products; Primary Metals; Nonmetallic Mineral Products; Electrical Equipment, Appliances & Components; **Plastics & Rubber Products**; Machinery; Food, Beverage & Tobacco Products; Miscellaneous Manufacturing; Computer & Electronic Products; Furniture & Related Products; Chemical Products; Transportation Equipment; and Paper Products.
- No industries reported paying decreased prices for raw materials in September.

Rubber Pricing



Silicone

North American & Northeast Asia U.S. Price/kg



Month-Over-Month Change:

Natural Rubber

North America: US\$2.44/kg, up \$0.15

Northeast Asia: US\$2.89/kg, up \$0.13

NBR

North America: US\$3.26/kg, down \$0.11

Northeast Asia: US\$2.51/kg, up \$0.16

SBR

North America: US\$2.44/kg, down \$0.06

Northeast Asia: US\$2.39/kg, up \$0.04

Neoprene

North America: US\$3.06/kg, down \$0.05

Northeast Asia: US\$2.89/kg, up \$0.01

EPDM

North America: US\$3.06/kg, up \$0.07

Northeast Asia: US\$3.01/kg, up \$0.25

Silicone

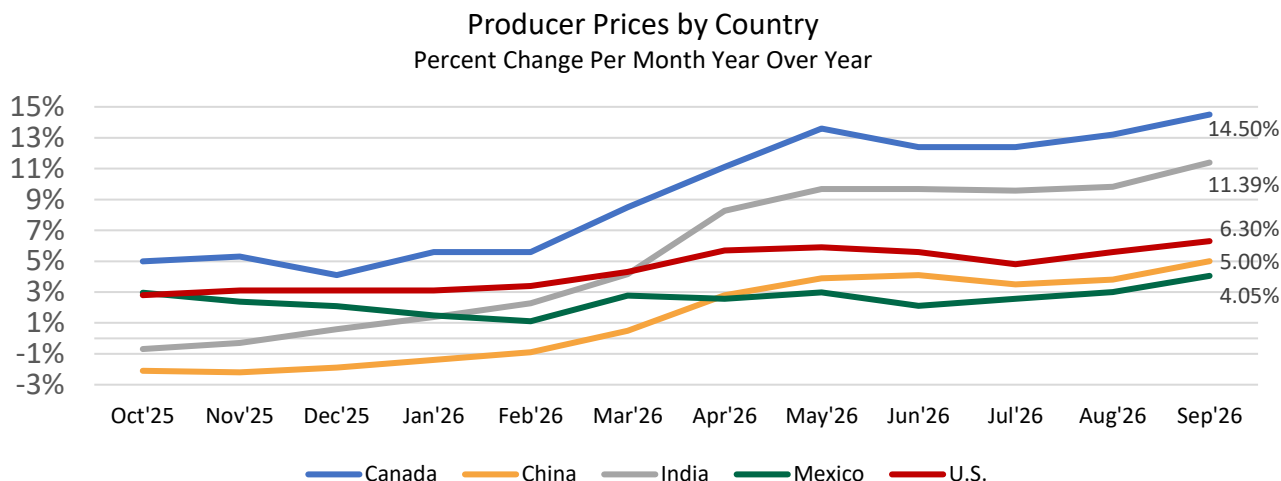
North America: US\$5.56/kg, up \$0.06

Northeast Asia: US\$2.53/kg, up \$0.12

October Summary:

- Global natural rubber prices reached as high as 265 U.S. cents per kg earlier in the month before retreating to current levels of around 254 U.S. cents per kg.
- The supply outlook has improved as rainfall eased in Thailand ahead of the fourth-quarter peak production season, raising expectations that tapping activity will recover from recent disruptions caused by heavy rain and flooding. Greater raw-material availability could relieve supply tightness and ease raw material prices, if favorable weather conditions persist.
- Meanwhile, persistently elevated oil prices have raised the cost of petroleum-based synthetic rubber, making natural rubber relatively more cost competitive.

Producer Prices By Country

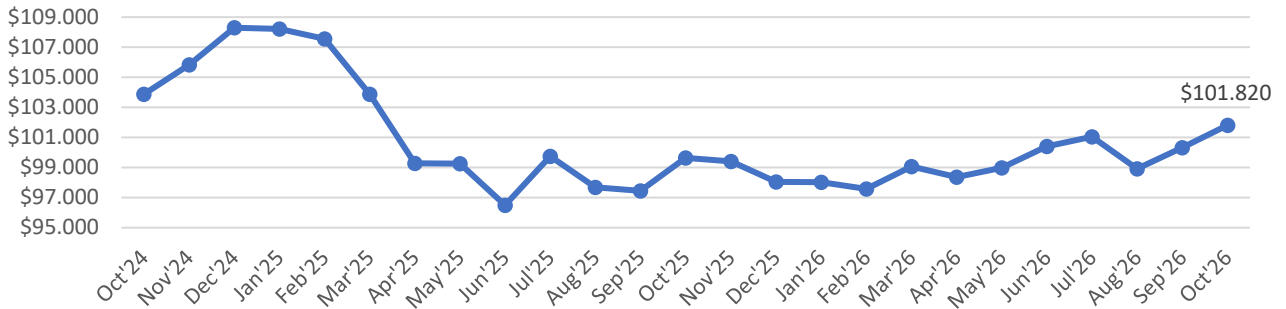


Key Takeaways:

- U.S. producer prices increased 1.3% in September, the largest monthly gain since 2022, and are now up 6.3% versus a year ago. In the past year, prices for goods are up 9.8%, with prices for intermediate processed goods up 14.1% and prices for intermediate unprocessed goods are up 21.5% versus a year ago. While more than 40% of the headline increase was due to energy (which rose 10.8% for the month), final demand prices excluding energy also rose 0.7% in September, as the second-order effects of higher energy prices work their way through the economy.
- China's annual producer price inflation accelerated to 5.0% in September, marking the strongest reading since June 2022. Higher fuel prices have been driving up business costs as the price of production materials accelerated to 6.5% from 5.0%. Increases were seen in mining (25.4% vs 17.8%), raw materials (9.4% vs 6.7%) and processing (3.4% vs 3.1%). In the first nine months of the year, producer prices have increased 2.3% compared to the same period last year.
- India's wholesale prices increased 11.39% year-on-year (YoY) in September. The acceleration was driven by faster increases in fuel, manufacturing, and food prices. Fuel inflation accelerated to 25.85% from 22.93%, and natural gas prices 57.32% vs 34.41%. Manufacturing inflation also accelerated to 9.76% from 8.37%, led by chemicals and chemical products (16.74%), rubber and plastics (13.47%), and basic metals (16.96%).

Foreign Exchange

ICE U.S. Dollar Index



Key Takeaways:

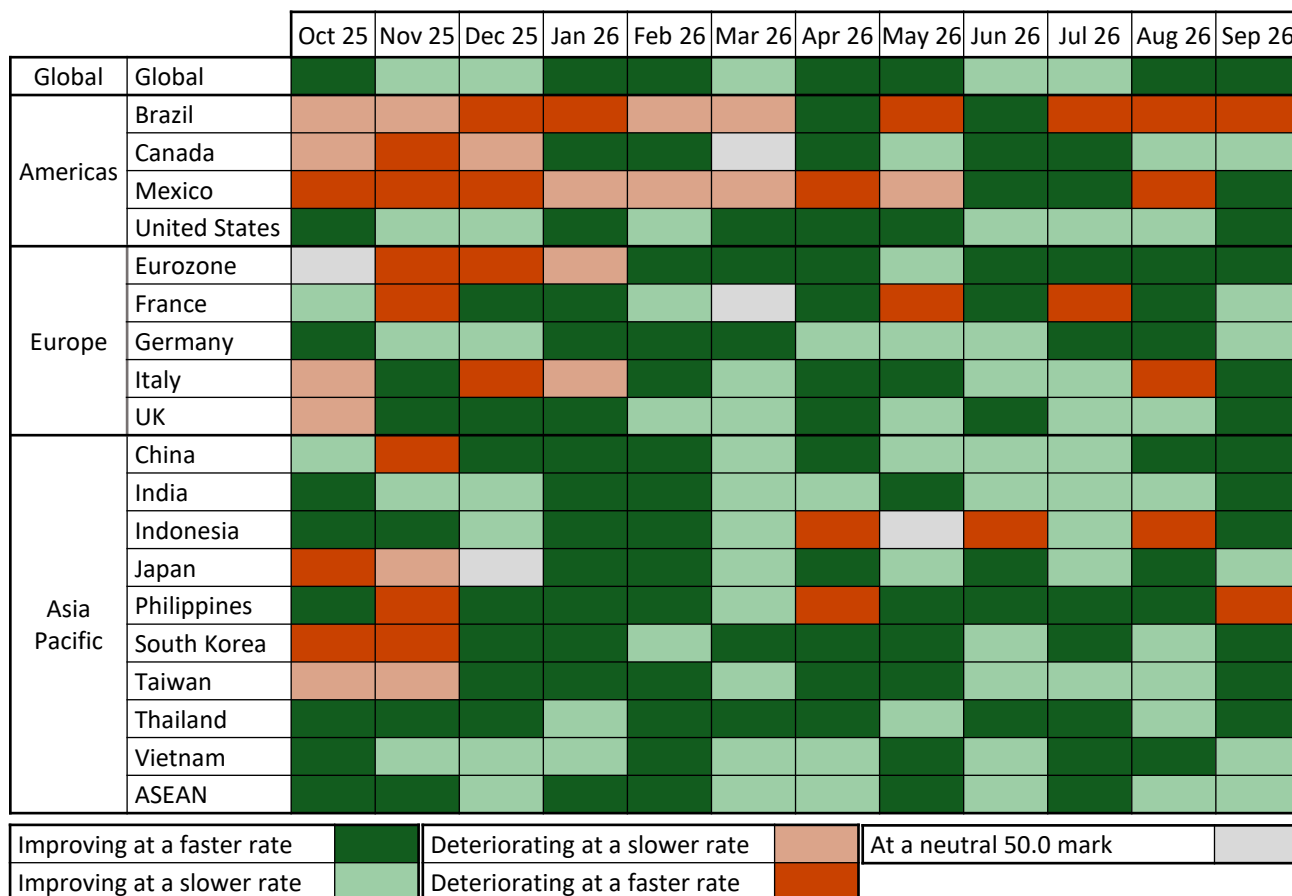
- The ICE U.S. Dollar Index (DXY) is a benchmark measuring the value of the USD against a basket of six major currencies (EUR, JPY, GBP, CAD, SEK, CHF). It serves as a key indicator for the currency's strength.
- A weaker U.S. dollar generally makes it more expensive for businesses to import goods from 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 extended its September rally into October, climbing to a 52-week high near 102.94 on October 14 before retreating to approximately 101.8.
- Despite the pullback, the index remains above September's closing level of 101.45, reflecting continued underlying strength. The dollar's strength has been supported by persistent inflation, elevated Treasury yields, and expectations of further Federal Reserve tightening following September's quarter-point rate increase.
- Meanwhile, renewed Middle East tensions and elevated energy prices continue to influence inflation expectations and demand for the dollar. A sustained move above 102 could reopen the path toward October's highs, while a more cautious policy outlook could leave the index consolidating around 101–102 in the near term.

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 growth accelerated for a sixth consecutive month in September, with factory output expanding at its fastest pace since the post-COVID-19 lockdown recovery. New orders also rose to their highest level since February 2022, supported by a rise in global trade flows.
- Excluding the post-pandemic rebound, September's reading was the strongest since May 2018, signaling one of the most favorable periods for global factory activity in recent years.
- Price growth meanwhile remained elevated in all major developed economies, with some countries (UK, Italy, Canada and Brazil) already showing signs of faltering growth amid rising costs, political uncertainty and elevated borrowing costs.

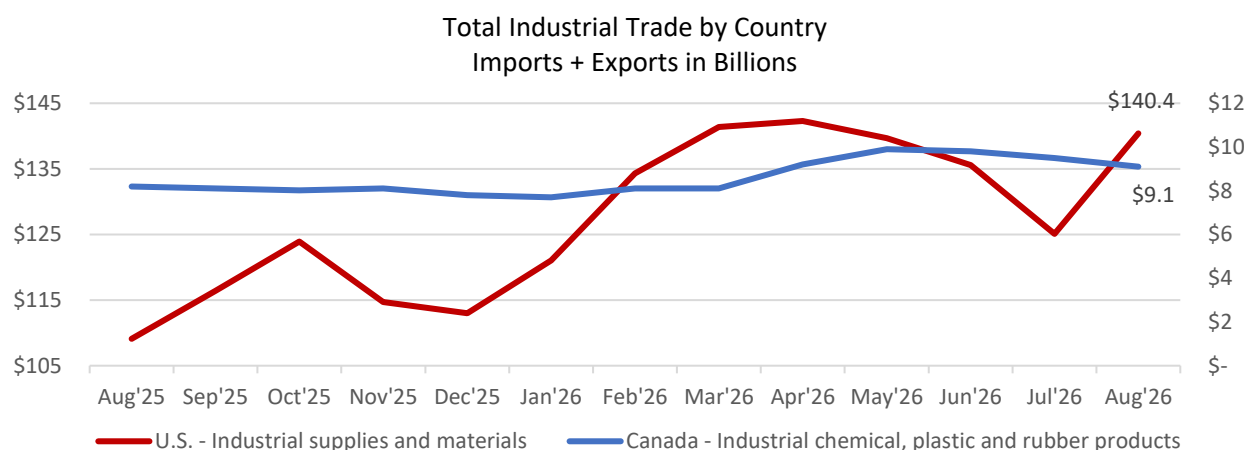
Global Sectors Heatmap

	Oct 25	Nov 25	Dec 25	Jan 26	Feb 26	Mar 26	Apr 26	May 26	Jun 26	Jul 26	Aug 26	Sep 26
Basic Materials												
Chemicals												
Forestry & Paper Products												
Metals & Mining												
Industrials												
Machinery & Equipment												
Industrial Goods												
Construction Materials												
General Industrials												
Transportation												
Improving at a faster rate												
Improving at a slower rate												
Deteriorating at a slower rate												
Deteriorating at a faster rate												
At a neutral 50.0 mark												

Key Takeaways:

- For the second month in a row, all monitored sectors indicated an expansion in output for the month. More notably, all sectors expanded at a faster rate than in August according to the latest S&P Global Sector PMI® data.
- Again, the Forestry & Paper Products sector recorded the weakest output growth, signaling only a slight increase.
- For the second straight month, Machinery & Equipment faced the steepest cost pressures of all monitored sectors.

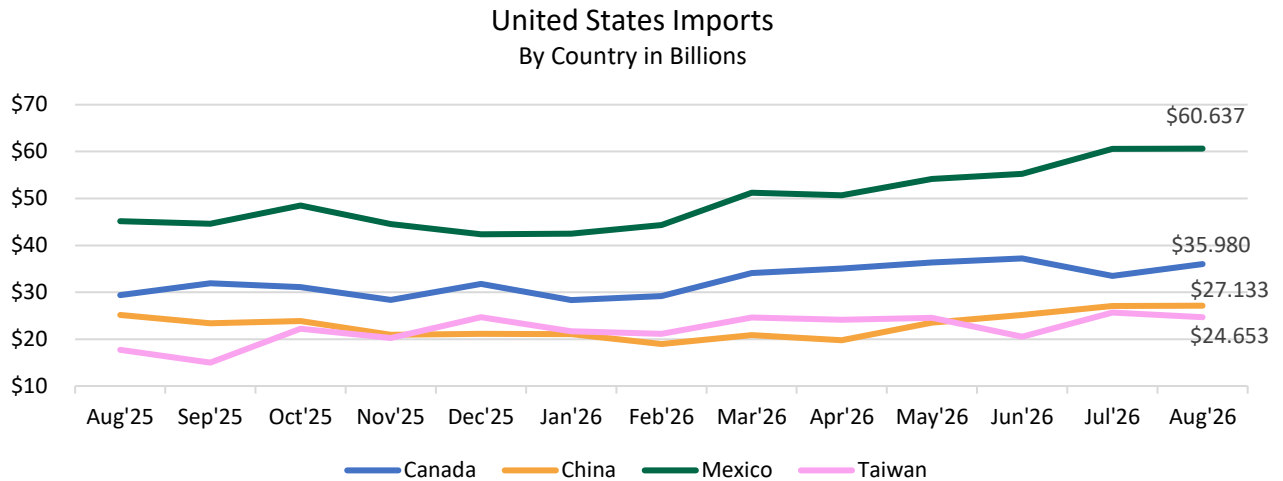
Total Trade Volume



Key Takeaways:

- Combining both imports and exports provides insight into the overall health and dynamics of that country or sector. Growing trade volumes can indicate strengthening economic activity, although changes in trade values may also reflect price movements.
- North American merchandise trade strengthened in August, with U.S. activity rebounding sharply while Canada's trade balance improved slightly. U.S. goods imports rose substantially faster than exports, while Canadian exports increased 2.5% and imports fell 2.0%. Overall, trade activity remained robust, though growth dynamics differed between the two economies.
- Industrial trade momentum diverged in August, with U.S. activity rebounding sharply and recovering much of July's decline, while Canadian trade continued to moderate. Canadian industrial chemical, plastic and rubber trade fell for a third consecutive month, though it remains above early-2026 levels.

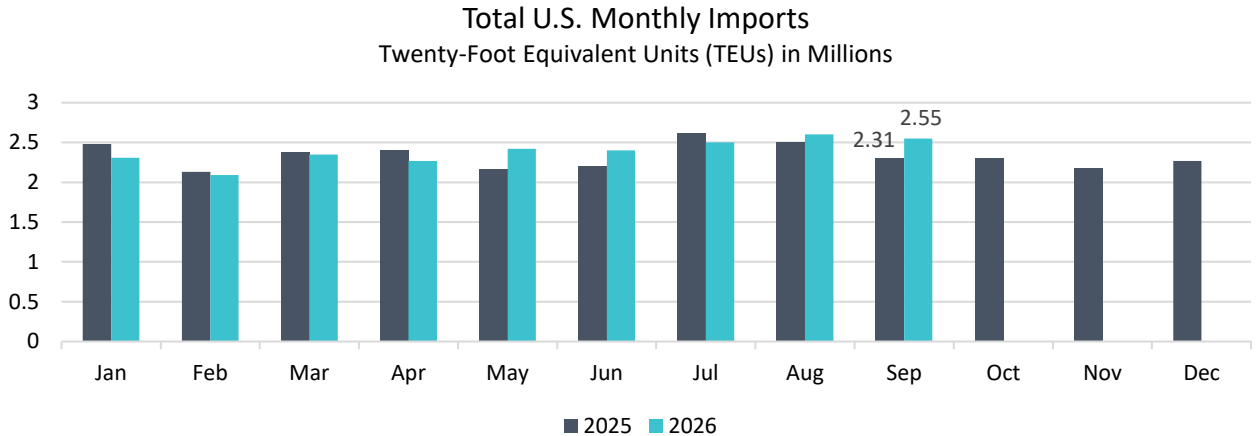
Total U.S. Imports By Country



Key Takeaways:

- U.S. imports from Mexico reached a new record of \$60.6 billion in August, edging above July's previous high and increasing an impressive 34.2% compared with August 2025. Year-to-date imports have now reached \$419.3 billion, reinforcing Mexico's position as the largest source of U.S. imported goods. The sustained growth is consistent with Mexico's expanding importance in North American manufacturing, particularly across automotive, electronics, machinery, and industrial supply chains.
- Imports from Canada rebounded to nearly \$36.0 billion in August, increasing 7.4% from July and approximately 23.5% compared with August 2025. The recovery follows July's 10% decline and brings Canadian shipments back toward the elevated levels recorded during the second quarter. While monthly fluctuations remain significant, the underlying trade relationship continues to demonstrate resilience despite ongoing tariff uncertainty and broader economic pressures.
- U.S. imports from China reached \$27.1 billion in August, remaining relatively unchanged from July but increasing 6.9% compared with August 2025. The latest figures extend China's recovery from its April low of \$19.8 billion, although the pace of growth has slowed considerably after several months of stronger gains.
- Imports from Taiwan declined 3.9% from July's record level but remained approximately 39.0% above August 2025. Taiwan's strong performance is consistent with sustained demand for advanced computing equipment, semiconductors, and technology infrastructure, particularly as investment in artificial intelligence and data centers continues to expand.

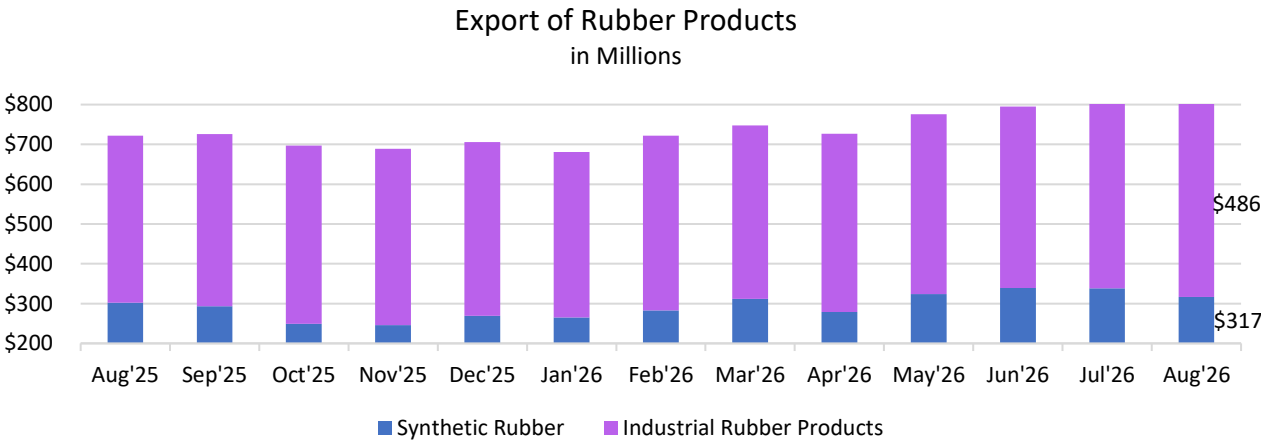
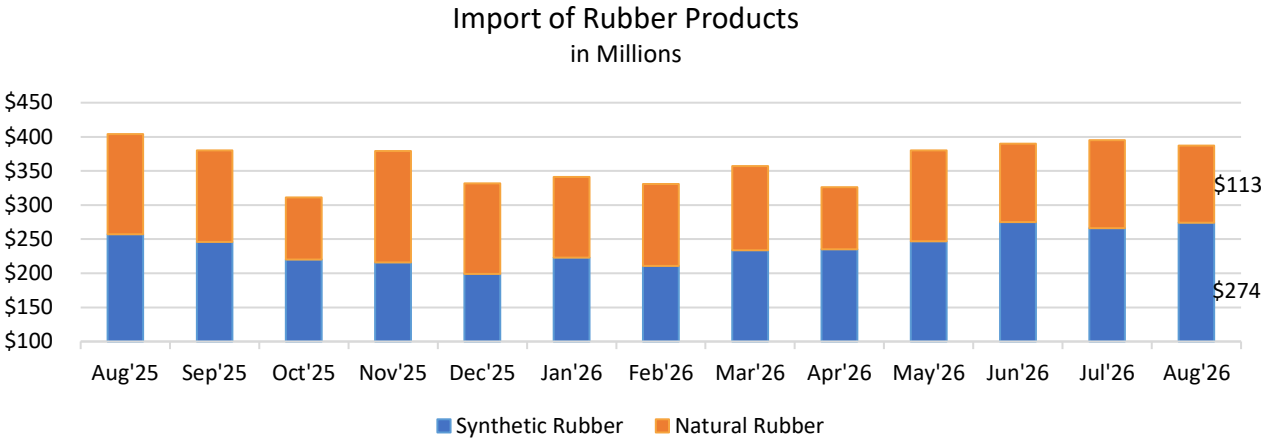
Total U.S. Container Imports



Key Takeaways:

- This year's drawn-out peak shipping season extended through September as U.S. containerized imports totaled 2,546,261 twenty-foot equivalent units (TEUs) for the month.
- It was the highest September volume on record, 24.8% above September 2019.
- The August-to-September change has varied considerably since 2016, with September volume increasing in only two of the last 11 years (2023 and 2024). September imports this year declined 2.2% from August, a smaller pullback than the 8.4% decline in 2025.
- Container imports from China reached 924,454 TEUs in September, increasing 40,136 TEUs (4.3%) from August and 161,682 TEUs (21.2%) from September 2025.
- China represented 36.3% of total U.S. container imports, up from 34.0% in August.
- Through the first nine months of the year, imports were up a slight 0.8% compared to the same period in 2025.

U.S. Rubber Import & Export Stats



U.S. Industry Import Index

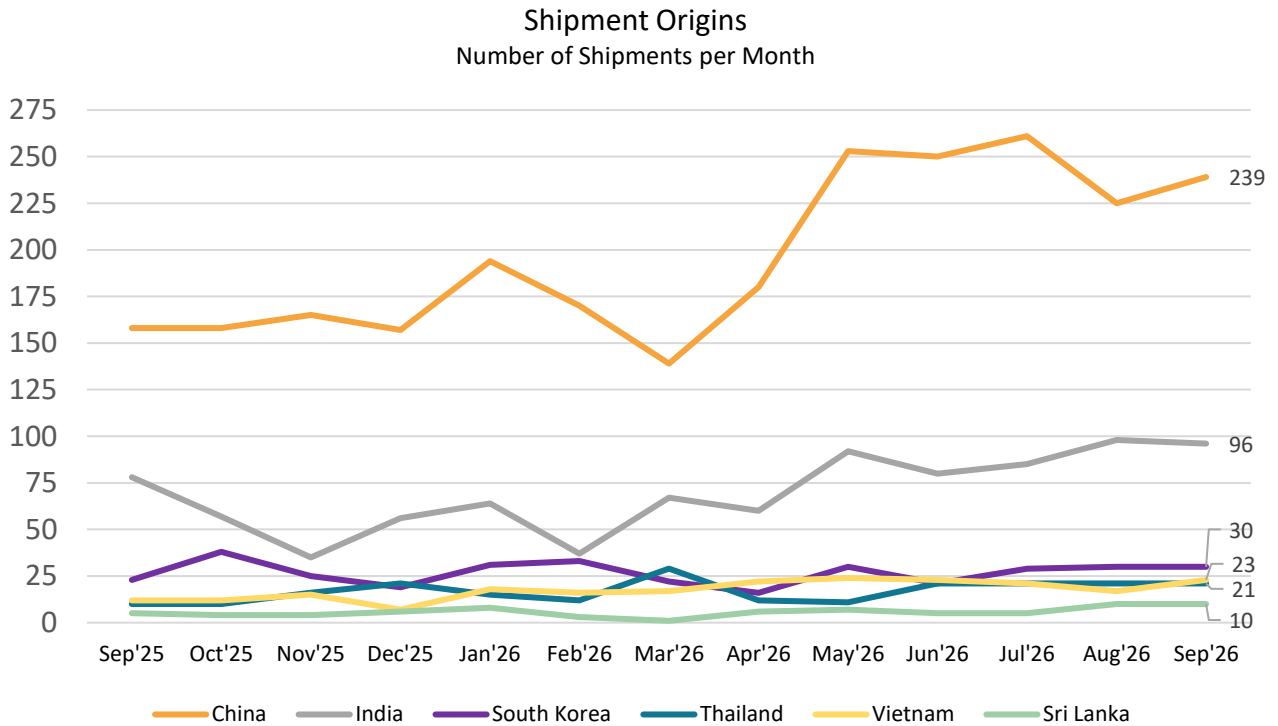
Institute for Supply Management (ISM®) Import Index						
Month	Percent Reporting	% Higher	% Same	% Lower	Net	Index
Sep 2026	84	13.1	75.7	11.2	+1.9	51.0
Aug 2026	85	10.1	84.7	5.2	+4.9	52.5
Jul 2026	85	16.0	79.4	4.6	+11.4	55.7
Jun 2026	86	12.5	80.7	6.8	+5.7	52.9
May 2026	85	15.4	75.2	9.4	+6.0	53.0
Apr 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:

- The index declined 1.5 percentage points in September to 51.0, remaining in expansion territory for the ninth consecutive month.
- The four industries that reported higher imports in September are: Electrical Equipment, Appliances & Components; Transportation Equipment; **Plastics & Rubber Products**; and Computer & Electronic Products.
- The seven industries that reported lower volumes in September are: Textile Mills; Wood Products; Paper Products; Machinery; Fabricated Metal Products; Miscellaneous Manufacturing; and Chemical Products.
- Seven industries reported no change in imports in September compared to August.

U.S. Sheet Rubber Imports By Country



Key Takeaways:

- U.S. imports of Chinese sheet rubber rebounded in September, with a 6.2% month-over-month (MoM) gain. The recovery follows August's decline and keeps volumes well above the levels recorded during much of late 2025 and early 2026. Despite ongoing sourcing diversification efforts, China's sustained strength reinforces its position as the dominant supplier to the U.S. market, accounting for nearly 47% of all sheet rubber imports year-to-date (YTD).
- Imports of Indian sheet rubber eased slightly in September, declining from 98 containers in August to 96. Despite the modest pullback, volumes remained near their highest level of the past year and approximately 23% above September 2025. India's position as the clear second-largest supplier behind China remains firmly established even as Chinese imports recover.

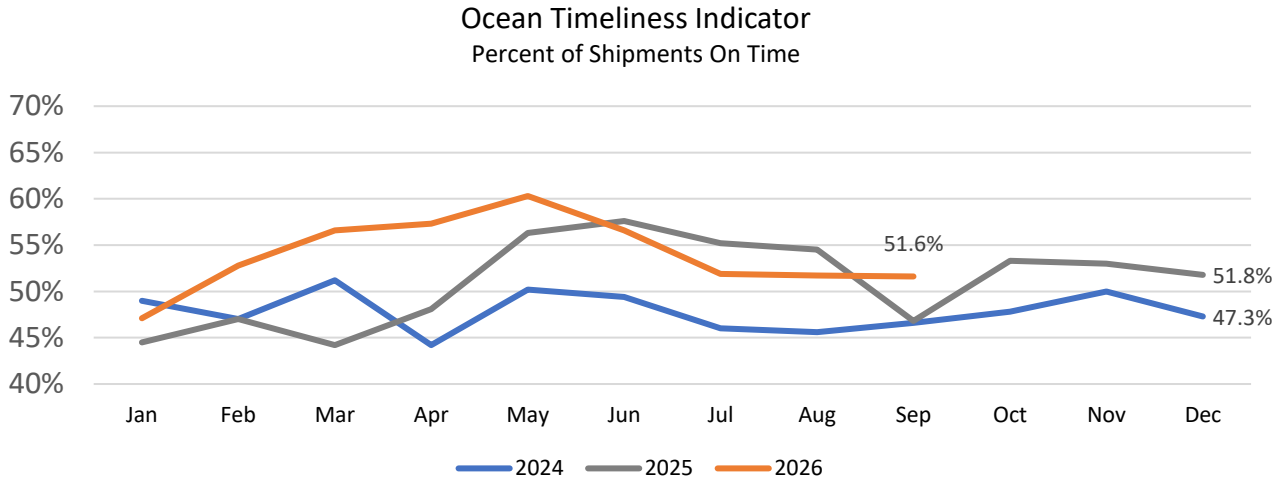
Port Operations

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

Key Takeaways:

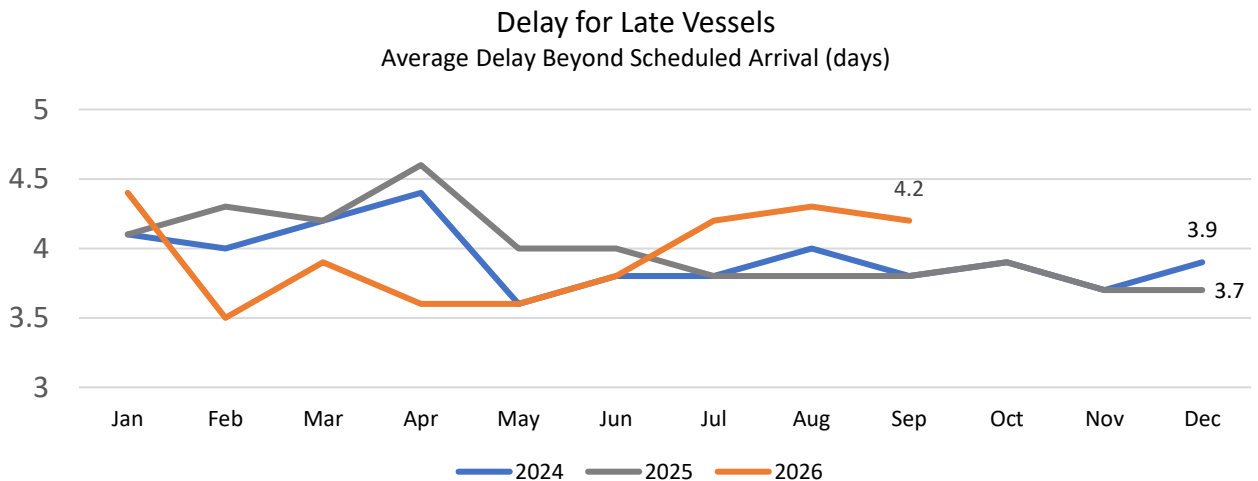
- Recent typhoons that closed ports have led to port omissions, transshipment changes, and cargo backlogs at major hubs including Singapore, Port Klang in Malaysia, and Shanghai in China.
- Those schedule changes have exacerbated global port congestion, which remains exceptionally high and is tying up around 12% of available vessel capacity.
- The ports of Vancouver and Prince Rupert continue to see variability in handling containers for inland transit as uneven vessel arrivals feed into terminal and rail operations.
- Railcar shortages are extending import dwell time at the ports of Los Angeles and Long Beach and slowing container movement inland. Empty-container repositioning is adding another complication to equipment flow.
- Following the September reduction in transit availability, the Panama Canal Authority increased the available daily transit slots, beginning October 15, 2026. The Authority cautions that vessels without reservations may still face indefinite waits, so East and Gulf Coast routings remain sensitive to booking availability and water conditions.

Global Ocean Freight Schedule Reliability



Key Takeaways:

- Global schedule reliability remained broadly stable in September at 51.6%, compared with 51.7% in August, following the sharp deterioration recorded in June and July.
- Trade-lane performance improved broadly in September, with 13 of the 20 corridors recording MoM gains, compared with nine in August. Asia-North America West Coast services fell for the third month in a row from 51.3% to 50.6%, while Asia-North America East Coast services also fell for the third consecutive month from 50.9% to 46.5%.



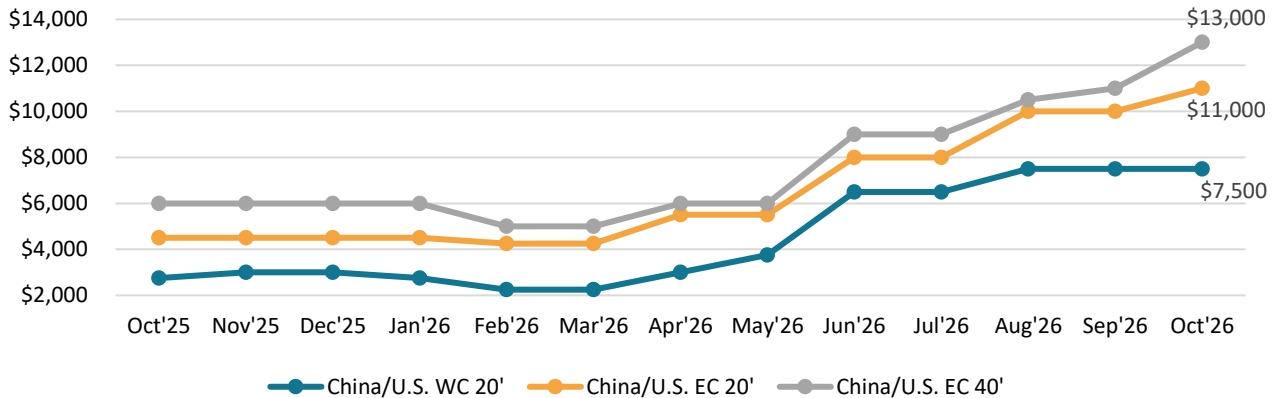
Key Takeaways:

- The average delay for late vessels improved marginally to 4.2 days. However, on-time arrival performance remains weak, providing little evidence of a broader near-term recovery.

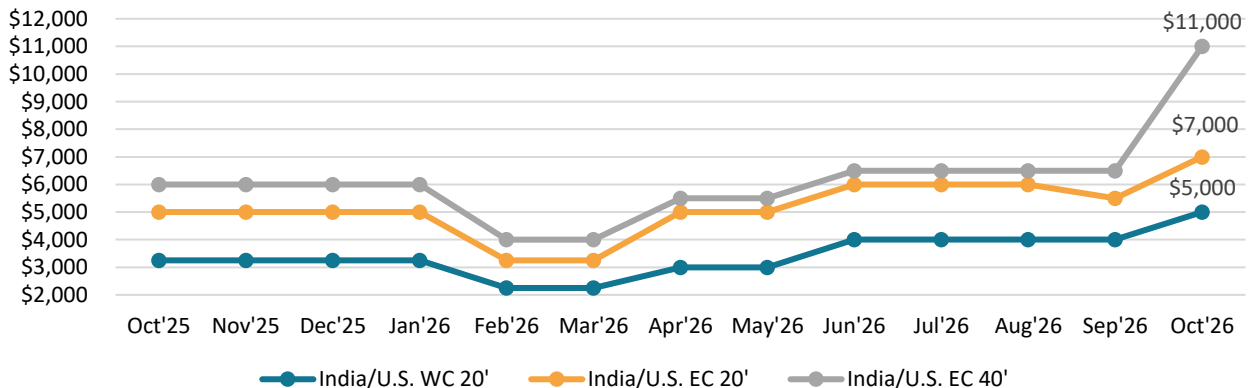
Ocean Freight Rates

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

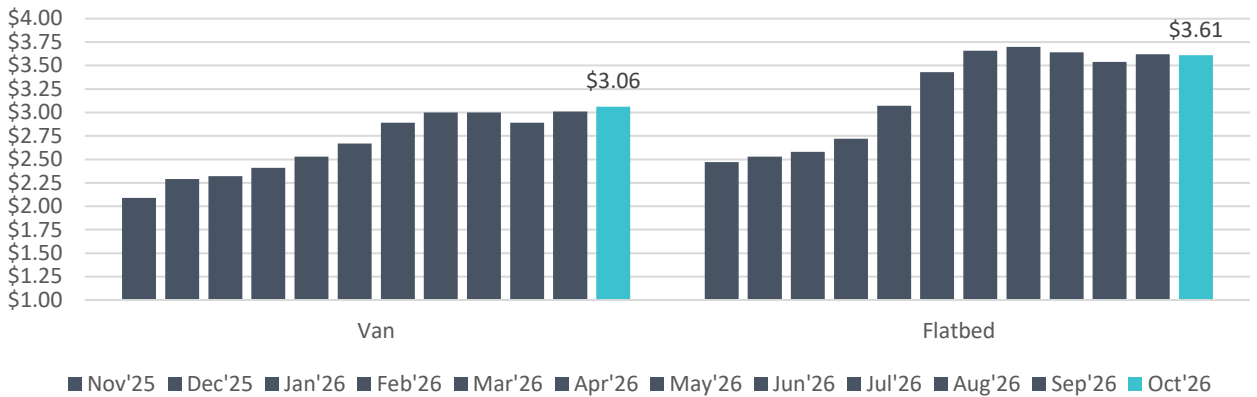


Key Takeaways:

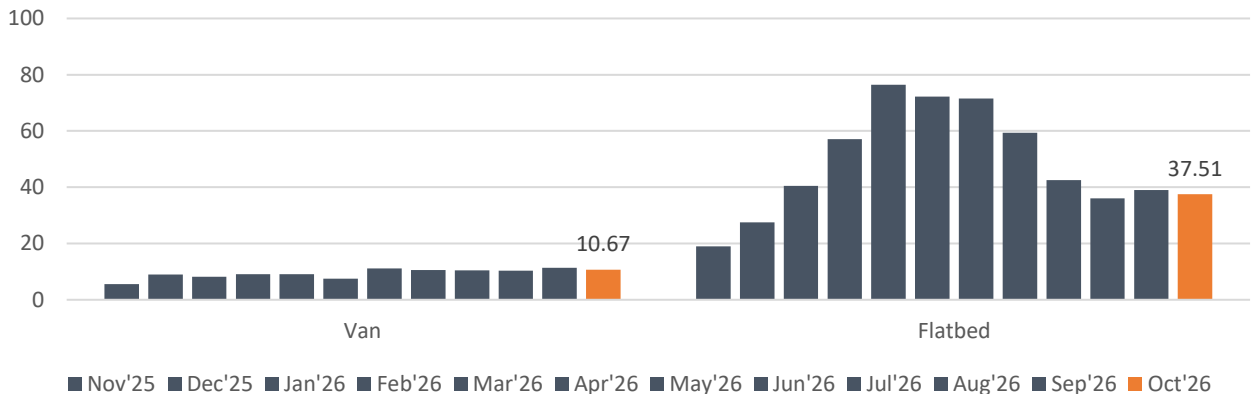
- Transpacific ocean freight rates remain near multi-year highs despite a seasonal dip in demand during China's Golden Week holiday.
- Rates have risen since late September and are up between 40% and 80% year over year.
- Carriers have announced capacity reductions of 12–15% across Asia–U.S. trade lanes for October and November.
- Rates are expected to stay elevated through year-end.

Truckload Shipping

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



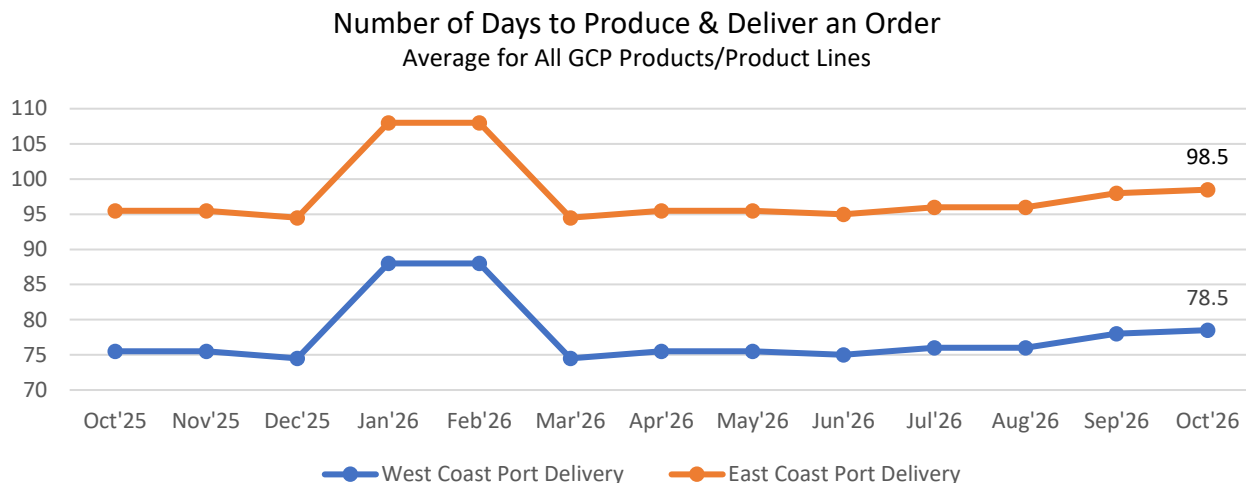
North American Load-to-Truck Ratio
Average Number of Loads Posted for Every Truck Posted



Key Takeaways:

- Elevated diesel prices continue to put upward pressure on transportation costs, even as spot rates stabilize.
- Truckload capacity conditions have eased modestly but remain historically tight, with active truck utilization expected to remain near peak levels through year-end.
- Higher operating costs and equipment expenses continue to discourage meaningful fleet expansion despite stronger truckload rates.
- Looking ahead, conditions should hold steady through at least early November before the holiday demand and winter weather settle in.

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 lead times have gradually increased since June, driven by several factors, including rising raw-material costs, tighter manufacturing capacity, environmental and energy-related restrictions, extended procurement cycles, and logistics disruptions. Additionally, supply chain constraints affecting critical chemical additives have created temporary bottlenecks throughout the manufacturing process.

Resources

Tariffs Roundup

- <https://www.reuters.com/world/us-canada-working-deal-ease-steel-auto-tariffs-sources-say-2026-10-26/>
- <https://www.whitehouse.gov/fact-sheets/2026/10/fact-sheet-president-donald-j-trump-further-modifies-canadian-products-subject-to-tariffs-under-section-338/>
- <https://content.govdelivery.com/accounts/USDHSCBP/bulletins/4301b7d>
- <https://kpmg.com/us/en/taxnewsflash/news/2026/10/ustr-china-section-301-actions-product-exclusion.html>
- <https://www.whitehouse.gov/wp-content/uploads/2026/09/US-China-Board-of-Trade-Working-Procedures.pdf>
- <https://www.reuters.com/world/asia-pacific/us-treasurys-bessent-chinas-he-meet-unfinished-business-before-trump-xi-summit-2026-09-23/>

Raw Material Pricing

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

Rubber Pricing

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