

INDUSTRIAL TRADE REPORT | **November 2026**

ONE ECONOMY. MANY REALITIES

Throughout 2026, the defining story of the industrial economy has been its ability to sustain growth despite mounting pressures, but increasingly, that growth is masking divergent conditions across individual markets. Headline numbers continue to paint a relatively positive picture of the global economy, yet a closer look reveals a more nuanced reality. Record U.S. container imports coexist with softer industrial trade. Broader raw material inflation persists even as several key rubber prices decline. Ocean freight rates are easing while shipping reliability deteriorates. Depending on the industry, product category, or geographic market, businesses may be experiencing very different economic realities. While broad economic indicators remain valuable in understanding the overall operating environment, relying too heavily on them may obscure the underlying risks and shifts in competitive advantage.

By GCP Industrial Products

Executive Brief

As we wind down 2026, broader economic indicators continue to signal strength, but the underlying market conditions are becoming increasingly varied. This month's findings highlight important distinctions across industrial demand, material pricing, global sourcing and transportation, reinforcing the importance of understanding market-specific developments rather than relying solely on broader economic trends.

- **Tariff Uncertainty Returns:** The U.S. has proposed higher tariffs on 14 trading partners, potentially reshaping sourcing economics and competitive advantages in 2027.

- **Global Manufacturing Growth Moderates:** Economic expansion remains broad-based, although growth across the basic materials and industrial sectors has slowed.

- **Persistent Input Cost Pressures:** Raw material prices have increased for 25 consecutive months, while producer price inflation continues to accelerate across several major manufacturing economies.

- **Diverging Elastomer Prices:** Several key rubber grades recorded price declines in November, while silicone prices increased sharply across both North America and Northeast Asia.

- **Record Imports, Softer Industrial Trade:** U.S. container imports reached an all-time high of 2.67 million TEUs in October, contrasting with softer industrial trade in the latest available September data.

- **Ocean Freight Costs Ease:** Shipping rates are showing signs of softening heading into December but remain 80–150% above year-ago levels.

- **Shipping Reliability Deteriorates:** Global ocean freight schedule reliability declined to 48.3%, while port congestion continues to tie up more than 10% of global container fleet capacity.

Quote of the Month

- “New month, same trends: Any commodity consumed by AI/data centers is in a crunch, both for supply and pricing. We keep wondering when the madness will stop. In spite of these challenges, our demand remains strong and the supply chain is getting by, albeit with a lot of work. As we plan next year’s budget, it’s sobering to roll up the annualized impact of (1) remaining tariffs, (2) AI-impacted commodity price increases and (3) price increases related to geopolitically influenced commodities.” *[Miscellaneous Manufacturing - October 2026 ISM® Manufacturing PMI® Report]*

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Contents

Tariffs	4
Raw Material Pricing	5
Rubber Pricing	6
Producer Prices by Country	8
Foreign Exchange	9
Global PMI Manufacturing Heatmap	10
Global PMI Sectors Output	11
Total Trade Volume	12
Total U.S. Imports By Country	13
Total U.S. Container Imports	14
U.S. Rubber Import & Export Stats	15
U.S. Manufacturing Import Index	16
U.S. Sheet Rubber Imports By Country	17
Port Operations	18
Global Ocean Freight Schedule Reliability	19
Ocean Freight Rates	20
Truckload Shipping	21
GCP Production Times	22
Resources	23-24

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Tariffs

- The Trump administration has proposed to raise tariffs on 14 economies. According to the U.S. administration, the proposed duties target economies whose government-supported industrial overcapacity has weakened domestic manufacturing and discouraged investment in American production.

- The Office of the U.S. Trade Representative (USTR) launched its Section 301 investigations on March 11, 2025, examining whether foreign manufacturing policies unfairly restrict American commerce. Public comments are due by 5 January 2027, and hearings are set to begin on 25 January.

- The proposed tariff rates remain subject to consultation, negotiation and final determination. No implementation date has been announced.

Trading Partner	Current Baseline Tariff (July 2026)	Proposed Baseline Tariff (2027)
China	12.5% forced-labor Section 301 duty (plus 7.5%–25% on 2018 Section 301 goods)	Moves to 20% (up to 40% if the Jan. 10, 2027, truce expires without extension)
Vietnam	12.5% forced-labor Section 301 duty	Moves to 20% if a trade deal is reached (up to 35% without a deal)
Cambodia	12.5% forced-labor Section 301 duty	Moves to 18% cap (up to 25% ceiling)
Indonesia	12.5% forced-labor Section 301 duty	Moves to 18% cap (up to 25% ceiling)
Thailand	12.5% forced-labor Section 301 duty	Moves to 18% cap (up to 25% ceiling)
Malaysia	12.5% forced-labor Section 301 duty	Moves to 18% cap (up to 25% ceiling)
Bangladesh	12.5% forced-labor Section 301 duty	Moves to 18% cap (up to 20% ceiling)
India	10% forced-labor Section 301 duty	Moves to 17% if a trade deal is reached (up to 25% without a deal)
European Union	10% combined cap (including MFN duties)	Moves to 15% combined ceiling (up to 20% ceiling)
Taiwan	10% combined cap (including MFN duties)	Moves to 15% combined ceiling (up to 20% ceiling)
Japan	10% combined cap (including MFN duties)	Moves to 15% combined ceiling (up to 20% ceiling)
South Korea	10% combined cap (including MFN duties)	Moves to 15% combined ceiling (up to 25% ceiling)
Switzerland	10% combined cap (including MFN duties)	Moves to 15% combined ceiling (up to 20% ceiling)
Singapore	10% combined cap (including MFN duties)	Stays at 10% under current accord terms (up to 20% ceiling).

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Raw Material Pricing

Institute for Supply Management (ISM®) Price Index					
Month	Prices Higher	Prices Same	Prices Lower	Net	Index
Oct 2026	53.1%	44.1%	2.8%	+50.3	75.2
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
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 declined 2.7 percentage points to 75.2 in October, while the share of respondents reporting higher prices fell 5.5 percentage points to 53.1% from 58.6% in September.

- Despite the slight decline, the latest reading also marks the 25th consecutive month of rising raw material prices.

- In October, the 16 industries that reported paying increased prices are: Furniture & Related Products; Printing & Related Support Activities; Fabricated Metal Products; Nonmetallic Mineral Products; Electrical Equipment, Appliances & Components; Machinery; Paper Products; Textile Mills; Wood Products; Miscellaneous Manufacturing; Computer & Electronic Products; Primary Metals; Chemical Products; **Plastics & Rubber Products**; Transportation Equipment; and Food, Beverage & Tobacco Products.

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

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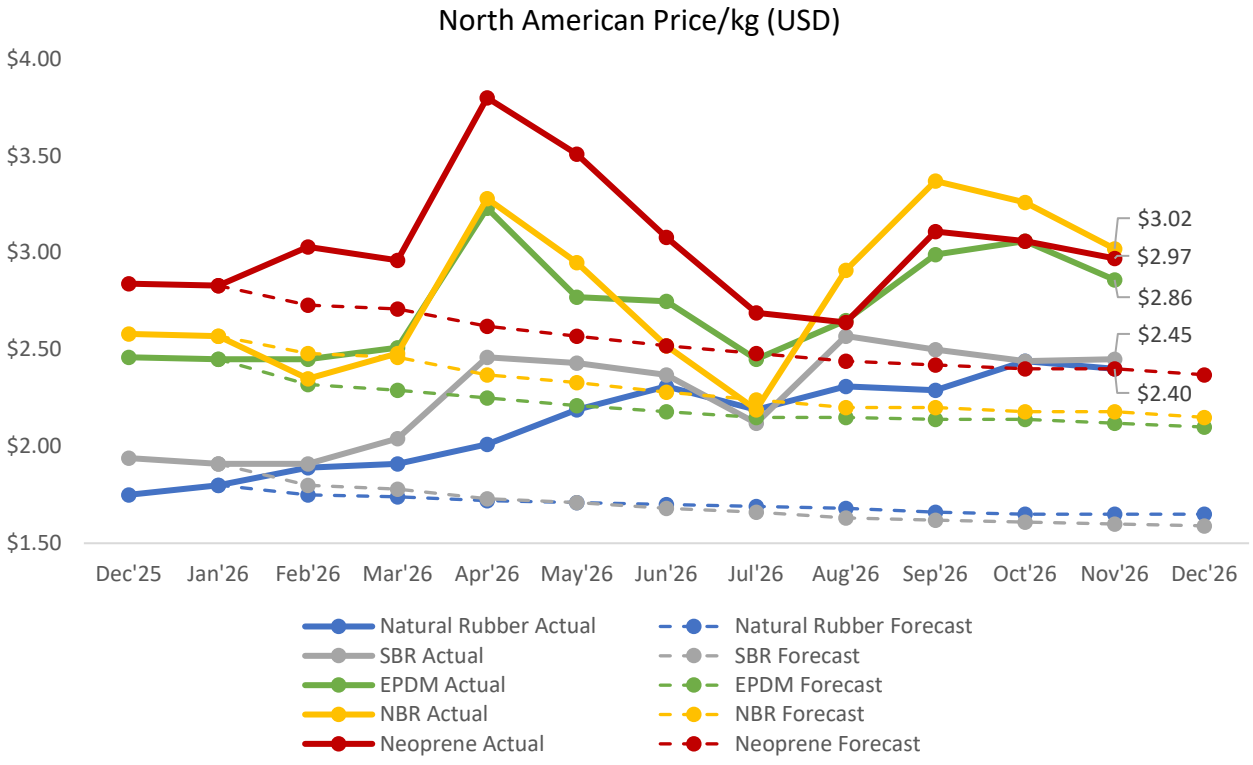
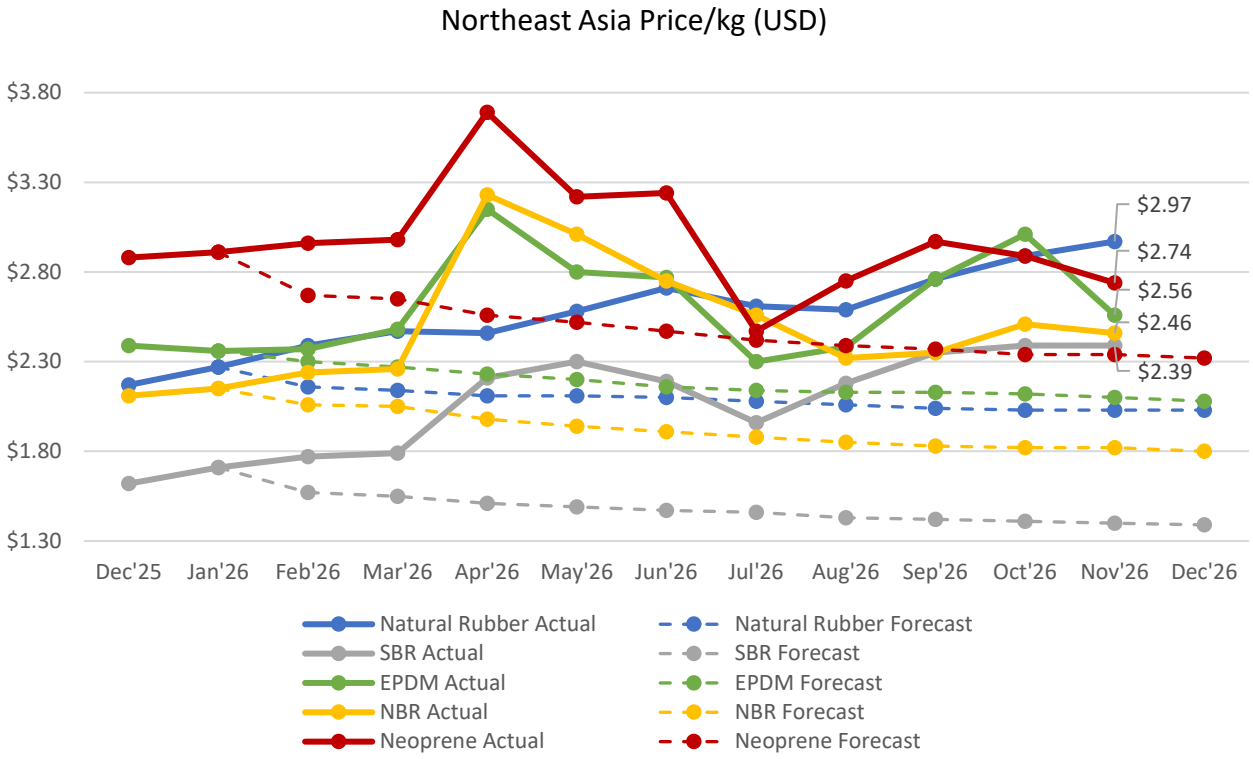
Rubber Pricing





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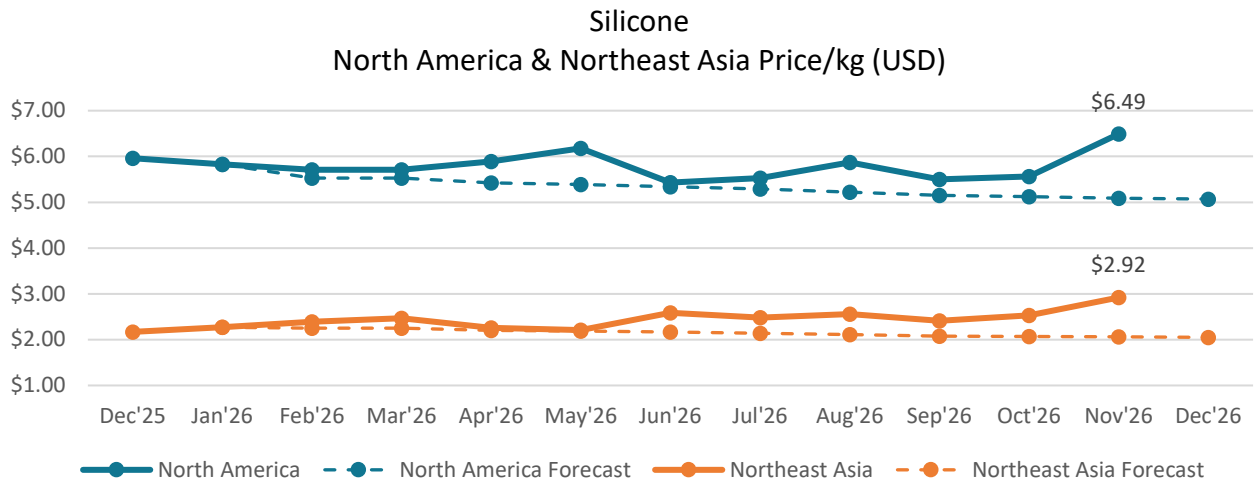

Month-Over-Month Change:

Natural Rubber
North America: US$2.40/kg, down $0.04
Northeast Asia: US$2.97/kg, up $0.08

SBR
North America: US$2.45/kg, up $0.01
Northeast Asia: US$2.39/kg, no change

EPDM
North America: US$2.86/kg, down $0.20
Northeast Asia: US$2.56/kg, down $0.45

NBR
North America: US$3.02/kg, down $0.24
Northeast Asia: US$2.46/kg, down $0.05

Neoprene
North America: US$2.97/kg, down $0.09
Northeast Asia: US$2.74/kg, down $0.15

Silicone
North America: US$6.49/kg, up $0.93
Northeast Asia: US$2.92/kg, up $0.39

November Summary:

- Global natural rubber prices have fallen to around 242 US cents per kilogram, moving back toward a nearly two-month low, as expectations of increased supply weighed on prices.
- Thailand, the world's top natural rubber producer, is entering its peak production season, raising prospects of higher output and greater supply availability.
- Lower crude prices have also pressured natural rubber, which competes with synthetic rubber, a petroleum-based alternative.
- In contrast to the price declines recorded across several rubber grades, silicone prices increased approximately 16.7% in North America and 15.4% in Northeast Asia in November, highlighting the increasingly divergent pricing conditions across elastomer markets.

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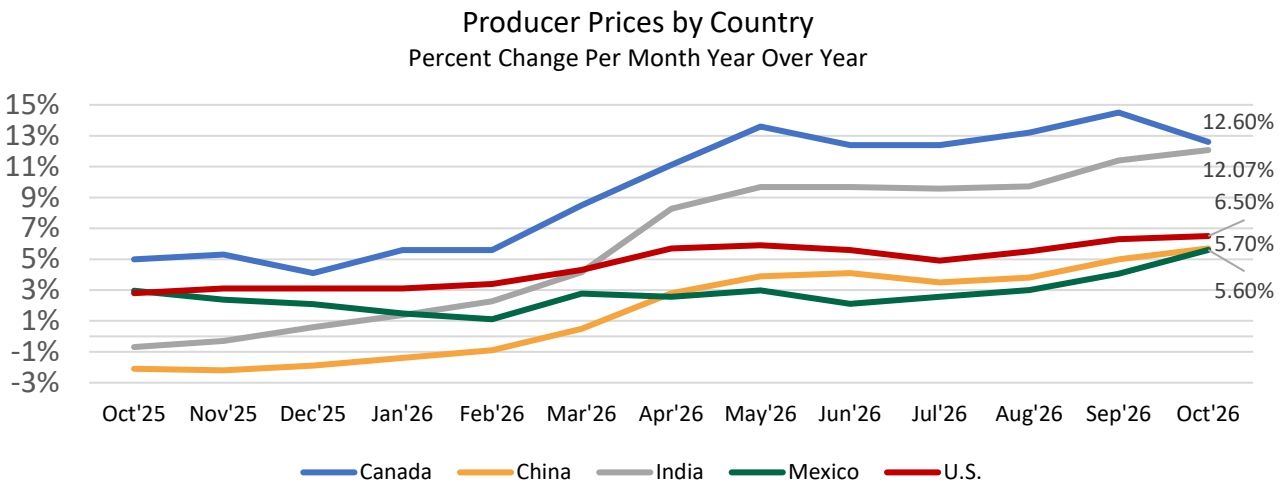
Producer Prices By Country



Key Takeaways:

- After surging in September, U.S. producer prices rose 0.3% in October, bringing the year-ago comparison to 6.5%, the highest in almost four years and more than double the year-over-year (YoY) increase recorded in October 2025. At the component level, goods prices rose 0.5% in October and are up 10.2% over the past year, also marking a four-year high. Goods excluding food and energy accounted for more than 60% of the monthly increase. Lastly, further upstream, annual price increases for both processed and unprocessed intermediate goods remain near their highest levels since 2022.

- China's producer prices rose 5.7% YoY in October, accelerating from 5.0% in the previous month, marking the fastest increase since June 2022, reflecting stronger commodity prices and improving industrial demand in the post-Golden Week period. Prices of production materials quickened further (7.4% vs 6.5% in September), driven by faster increases in raw materials (11.6% vs 9.4%), and processing (3.5% vs 3.4%). In the first ten months of 2026, producer prices climbed 2.7%, accelerating from 2.3% in the preceding period.

- India's wholesale prices climbed 12.07% YoY in October, the most since August 2022, accelerating from an 11.39% rise in September. Fuel prices surged (32.84% vs 25.85% in September), due to faster increases in crude petroleum and natural gas prices (70.80% vs 57.32%), and coal and lignite prices (10.49% vs 9.31%). On the positive side, manufacturing inflation moderated slightly to 9.54% from 9.76%, led by chemicals and chemical products (17.53%), basic metals (17.21%), rubber and plastics (13.90%).

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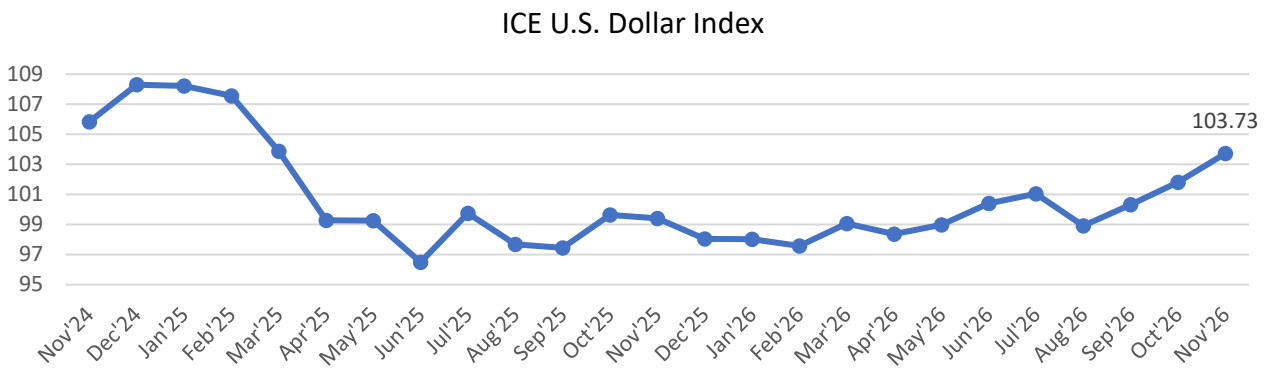
Foreign Exchange



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 Index reached a high of 104.53 on November 23rd, its highest level since March 2025, on expectations that the Federal Reserve will implement further interest rate hikes.

- The dollar has gained approximately 2.3% in November, putting it on course for its strongest November performance in a decade.

- Looking ahead, the index is approaching a key resistance level of 104.60. While persistent inflation and expectations of further monetary tightening could support additional gains, the dollar's recent appreciation may be outpacing its underlying economic fundamentals. The Federal Reserve's December 9 meeting will be critical in determining whether the rally can be sustained or a correction is becoming more likely.

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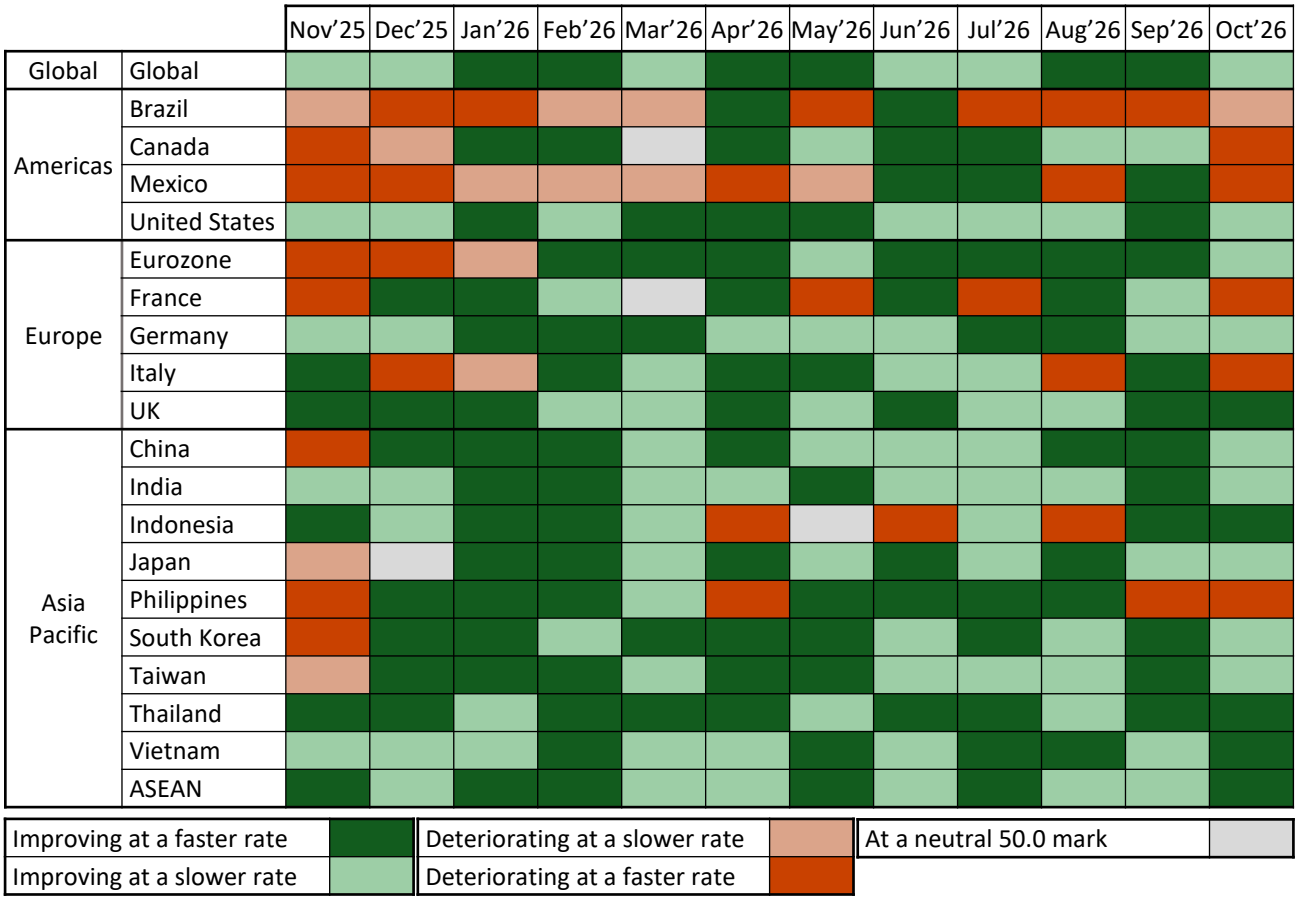
Global PMI Manufacturing Heatmap

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 remained among the fastest for four years in October, though the pace slowed compared to September. The expansion was broad-based by sector, albeit with a slowdown evident across all major industries.

- The U.S. reported the fastest output growth across the major developed economies for a fourth successive month in October. The rate of expansion slowed from September's 62-month high, partly due to lower business confidence and high prices.

- Supply chain bottlenecks and capacity constraints remained widespread in October, as supply shortages relative to demand allowed manufacturers to pass higher costs on to customers.

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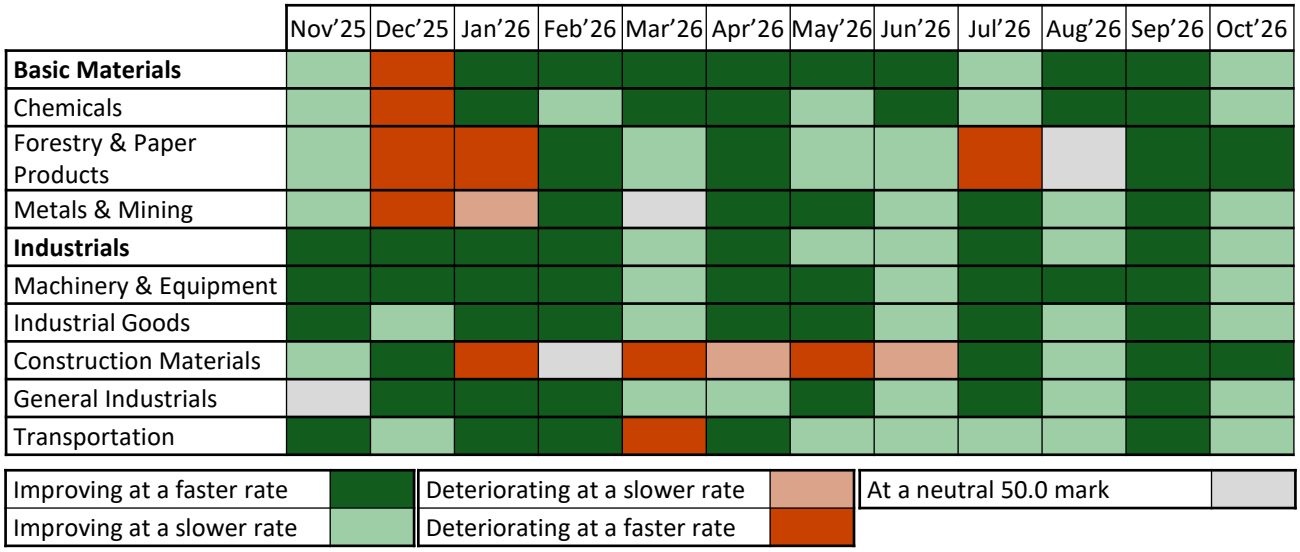
Global PMI Sectors Output



Key Takeaways:

- Business activity increased across all seven sectors (Technology, Financials, Consumer Goods, Consumer Services, Basic Materials, Industrials, and Healthcare) in October, although most recorded a slower pace of growth compared with the previous month.

- Basic Materials and Industrials continued to post robust increases in output. However, the pace of expansion moderated in both sectors in October.

- Of the subcomponents, Forestry & Paper Products companies were among the most confident in their 12-month outlook, even though they signaled the only reduction in new work for the month.

- While industrial activity continues to expand, the pace of growth varies across individual subsectors, reinforcing the importance of looking beyond broader economic indicators when assessing market-specific conditions.

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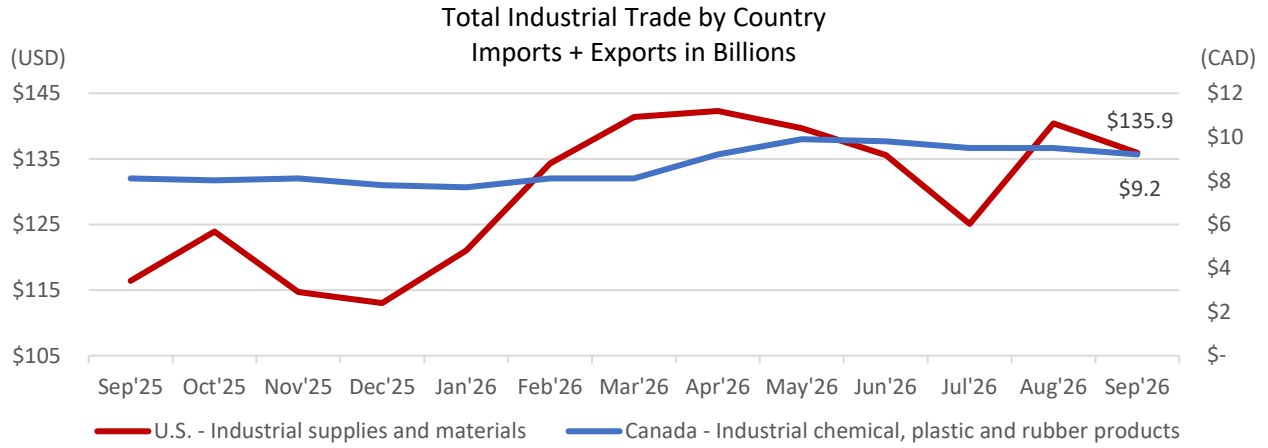
Total Trade Volume





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 remained strong in September, with growth momentum favoring the U.S. Total U.S. merchandise trade rose to $557.9 billion, up 1.8% from August and reached its highest level in the past year. Canada's merchandise trade remained relatively flat at $151.8 billion, suggesting activity has stabilized following the strong expansion earlier this year.

- Industrial trade softened in September, with U.S. industrial supplies and materials declining 3.2% and Canada's industrial chemical, plastic and rubber trade easing to $9.2 billion. Overall, industrial trade remains well above year-ago levels in both economies, but the softer industrial trade suggests that growth is becoming more concentrated in other sectors.

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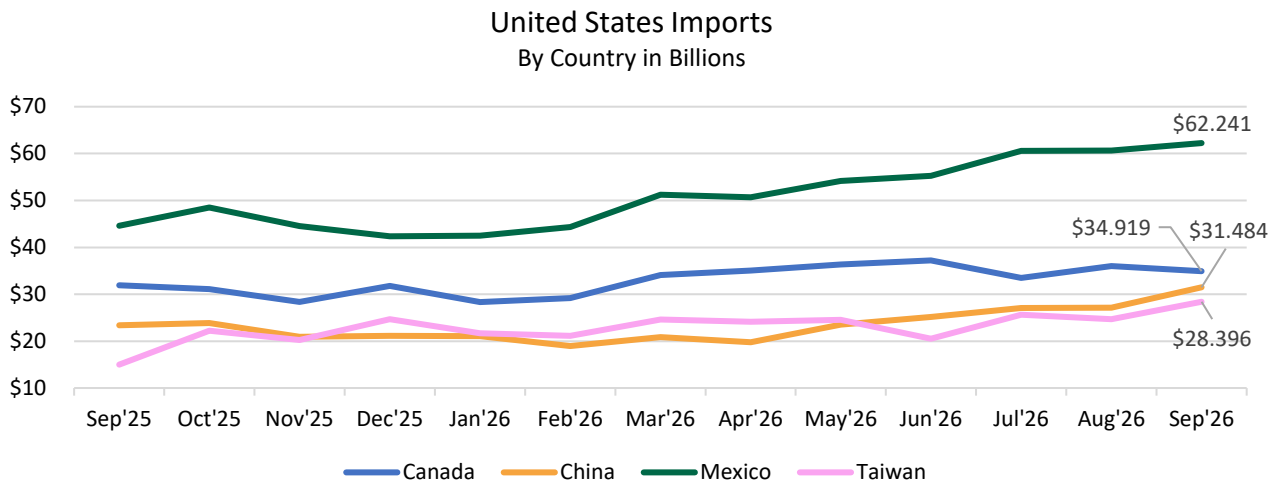
Total U.S. Imports By Country



Key Takeaways:

- U.S. imports from Mexico reached another all-time record of $62.2 billion in September, increasing 2.6% from August and 39.6% compared with September 2025. This marks the fifth consecutive month in which Mexican imports have established a new record, bringing year-to-date imports to $481.6 billion. Particularly noteworthy is that Mexico alone has supplied more goods to the U.S. through the first nine months of 2026 than China and Taiwan combined.

- U.S. imports from Canada declined to $34.9 billion in September, down 2.9% from August but remaining 10.0% above September 2025. Following a strong first-half recovery, Canadian imports have struggled to maintain momentum as renewed U.S. tariffs increase cost pressures and weaken the competitiveness of Canadian manufacturers. While integrated North American supply chains continue to underpin Canadian trade, the country's relatively modest growth compared with Mexico suggests recent U.S. tariffs are having an impact.

- China's export recovery accelerated significantly in September, with shipments to the U.S. reaching $31.5 billion, up 16.0% from August and 33.9% compared with September 2025. Imports have now increased for five consecutive months and are approximately 59% above their April level, demonstrating a substantial recovery. While U.S. sourcing diversification remains evident in the year-to-date numbers, the strengthening demand for Chinese goods highlights China's enduring importance within global supply chains.

- Taiwan's growing importance within U.S. supply chains was further reinforced in September, with imports reaching an all-time record of $28.4 billion, up 15.2% from August and an extraordinary 89.2% compared with September 2025. Taiwan continues to narrowly surpass China in year-to-date U.S. imports, illustrating the growing influence of technology-related demand on global trade patterns.

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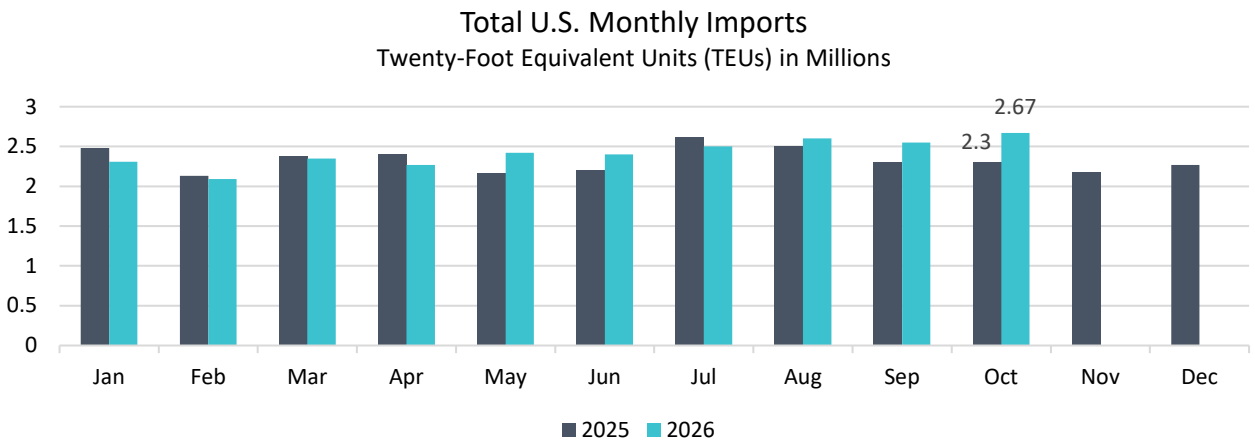
Total U.S. Container Imports



Key Takeaways:

- U.S. containerized imports rose 5.0% month-over-month (MoM) to 2,674,808 TEUs in October 2026. Volumes were 16.0% higher than a year earlier and 29.2% above pre-pandemic levels in October 2019.
- October exceeded the previous high of 2,622,465 TEUs set in May 2022 by 52,343 TEUs (2.0%), making it the largest monthly volume on record.
- China-origin imports rose for a fourth consecutive month to 987,805 TEUs, the highest monthly volume since January 2025, accounting for approximately half of the total U.S. MoM increase.
- China represented 36.9% of total U.S. container imports, up from 36.3% in September.
- Imports from the top 10 countries of origin increased by 106,904 TEUs (5.8%) from September to October 2026. Germany and South Korea led with increases of 22.8% each, followed by Hong Kong (7.8%), China (6.9%), Indonesia (6.5%), Thailand (4.3%), Japan (1.9%), India (-0.2%), Vietnam (-1.2%), and Taiwan (-3.6%).
- Through the first 10 months of 2026, imports increased 2.3% from the same period last year.

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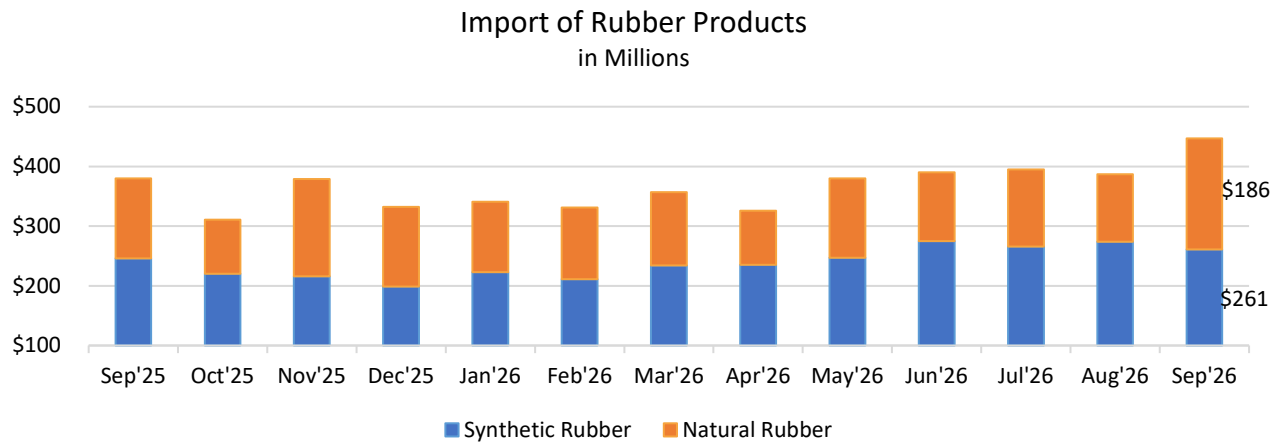
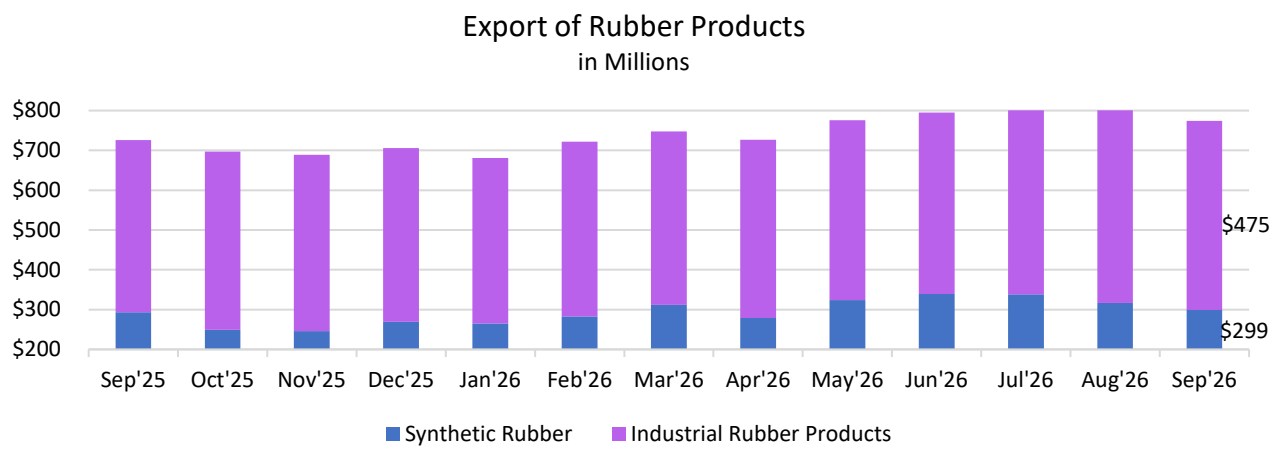
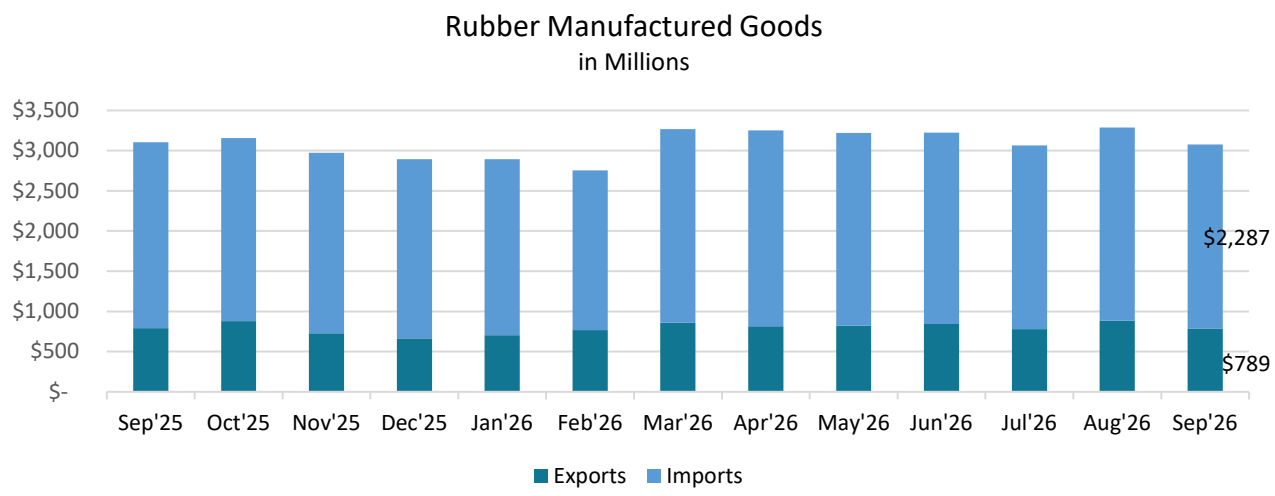
U.S. Rubber Import & Export Stats







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U.S. Manufacturing Import Index

Institute for Supply Management (ISM®) Import Index						
Month	Percent Reporting	% Higher	% Same	% Lower	Net	Index
Oct 2026	84%	13.8%	78.2%	8.0%	+5.8	52.9
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

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

Key Takeaways:

- The index increased 1.9 percentage points in October, remaining in expansion territory for the tenth consecutive month.
- The seven industries that reported higher imports in October are: **Plastics & Rubber Products**; Miscellaneous Manufacturing; Primary Metals; Computer & Electronic Products; Transportation Equipment; Food, Beverage & Tobacco Products; and Machinery.
- The three industries that reported lower volumes in October are: Wood Products; Paper Products; and Fabricated Metal Products.
- Eight industries reported no change in imports in October compared to September.

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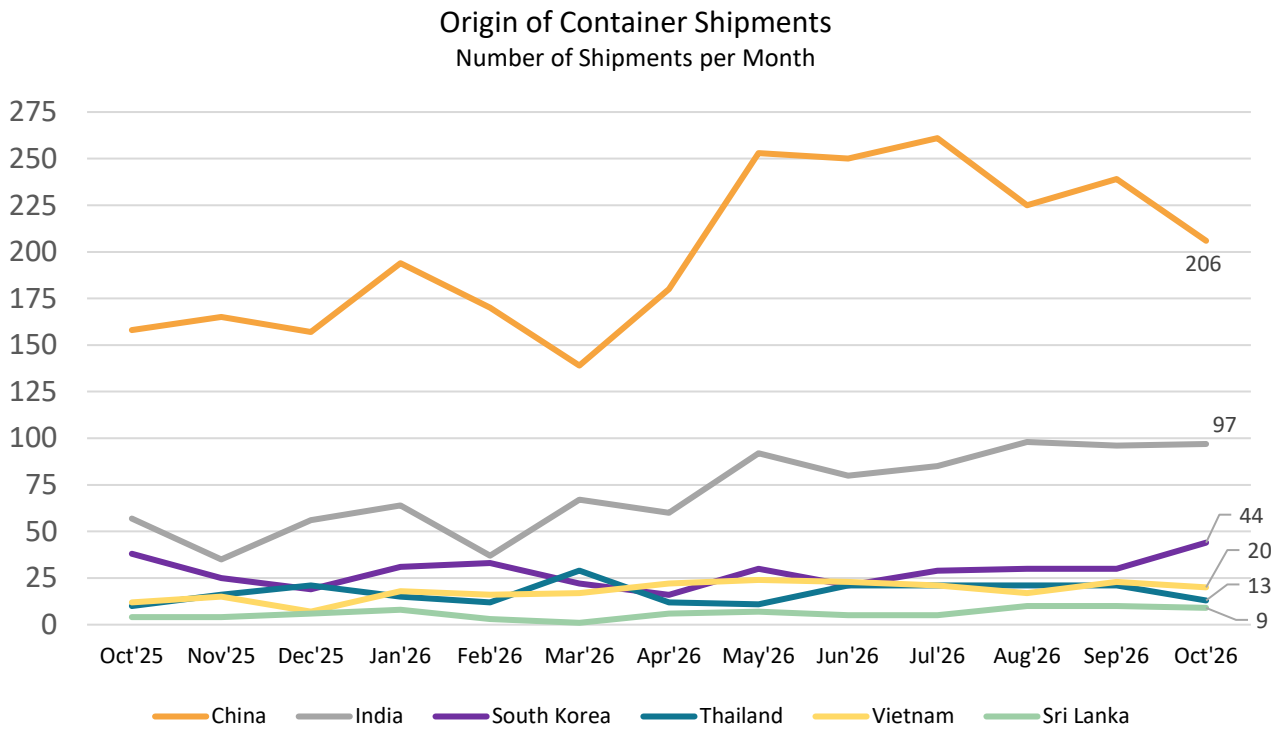
U.S. Sheet Rubber Imports By Country



Key Takeaways:

- U.S. imports of Chinese sheet rubber declined from 239 containers in September to 206 in October, a 13.8% MoM decrease. The decline was likely influenced, at least in part, by China's annual Golden Week holiday, which temporarily disrupted manufacturing operations and shipping schedules from October 1-7. Despite recording the lowest monthly volume since April, shipments remain 30.4% above October 2025 levels.

- U.S. imports of Indian sheet rubber remained strong in October, increasing slightly from 96 containers in September to 97. This marks the third consecutive month with volumes exceeding 95 containers, while shipments are now 70.2% higher YoY. India's sustained strength, particularly amid fluctuating Chinese volumes, reinforces its position as the primary diversification alternative to China.

- South Korea recorded a particularly strong October, with sheet rubber shipments to the U.S. rising from 30 containers in September to 44, a 46.7% MoM increase and the highest monthly volume in a year. The increase follows three months of relatively stable activity and further strengthens South Korea's position as the third-largest supplier to the U.S.

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Port Operations

Current North American Port Dwell Times				
Region	Port	Vessels Waiting	Average Wait for Berth	Rail Dwell Times
U.S. West Coast	LA/LB	2	0 days	12 days
	OAK	2	0 days	8 days
	SEA/TAC	0	0 days	6 days
Canada West Coast	Van	3	6 days	5 days
	PRR	4	11 days	6 days
U.S. East Coast / Gulf Coast	NY/NJ	2	0 days	3 days
	BAL	5	0 days	5 days
	NOR	2	0 days	3 days
	CHS	4	1 day	5 days
	SAV	6	1 day	2 days
	HOU	0	3 days	6 days

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

Key Takeaways:

- Port congestion continues to disrupt global container shipping, with more than 10% of the global container fleet currently tied up at ports, reducing vessel availability for long-haul routes.
- In Asia, congestion at Shanghai and Ningbo eased following Golden Week in early October. However, residual cargo backlogs and disrupted vessel rotations continue to affect port operations. These disruptions have also extended to Singapore, where shifting vessel arrival times and connecting services are contributing to longer container dwell times and changes to scheduled departures.
- In North America, congestion pressures vary by gateway. Elevated import volumes in Southern California are contributing to longer inland moves, while extended chassis cycles in Savannah and shorter terminal-access windows in Norfolk are placing additional strain on equipment productivity and container recovery.
- Looking ahead, 42 blank sailings are scheduled across major East–West trades between Week 48 (November 23–29) and Week 52 (December 21–27), out of 724 planned sailings. This represents a cancellation rate of approximately 6% and points to continued adjustments to capacity across major trade lanes.

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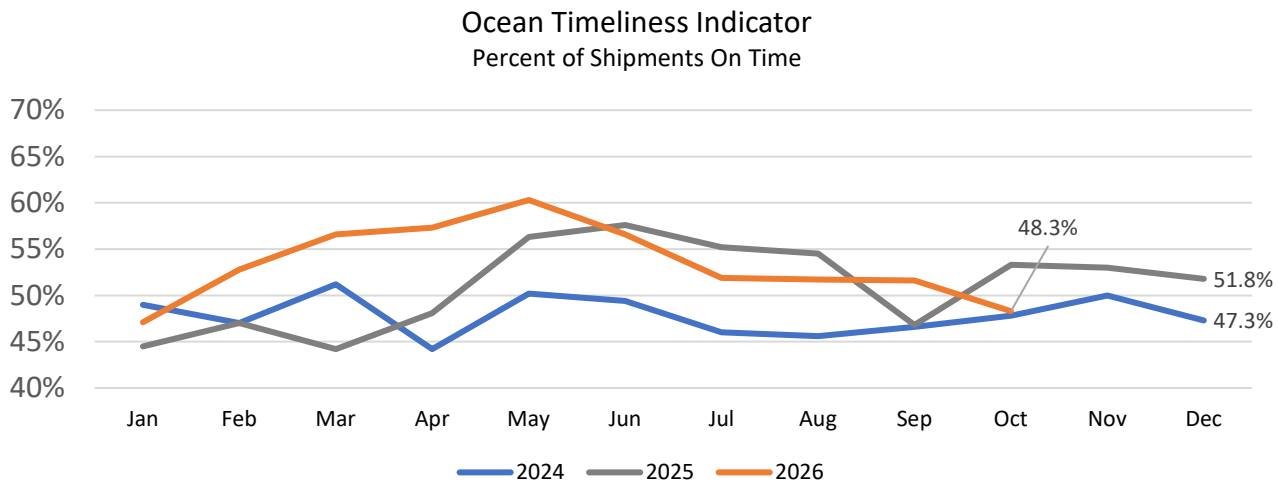
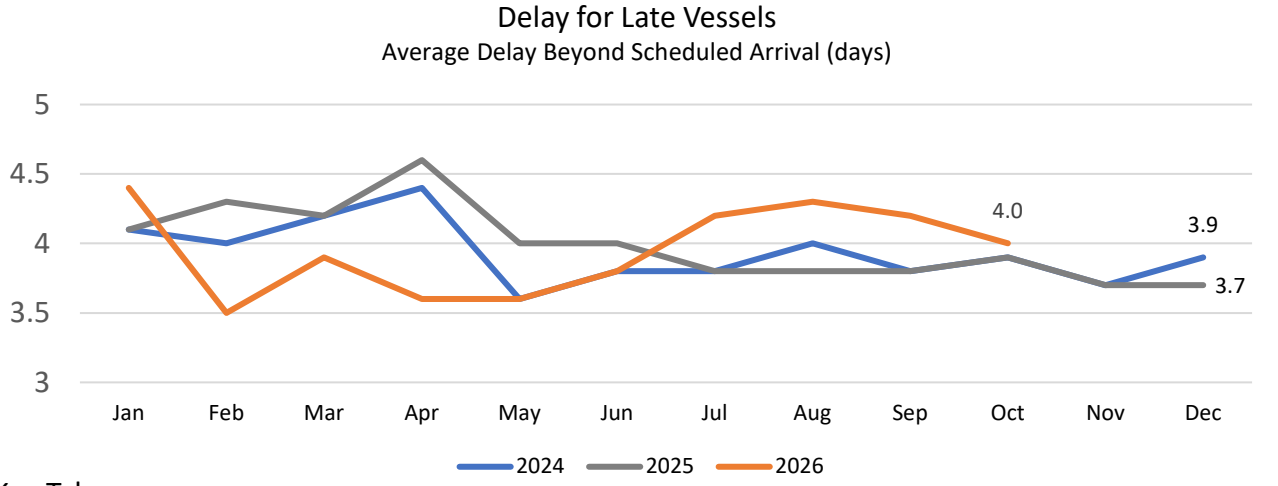
Global Ocean Freight Schedule Reliability



Key Takeaways:

- Global schedule reliability weakened further in October, falling from 51.6% in September to 48.3%. Performance moved below the 50% level and remained well below the stronger results recorded earlier in 2026.

- Trade-lane performance weakened broadly in October, with 14 of the 20 corridors declining. Asia-North America West Coast services fell for the fourth month in a row from 50.6% to 46.1%, while Asia-North America East Coast services also fell for the fourth consecutive month from 46.5% to 44.7%.



Key Takeaways:

- The average delay for late vessels improved slightly to 4.0 days. However, on-time arrival performance remains weak, providing little evidence of a broader near-term recovery.

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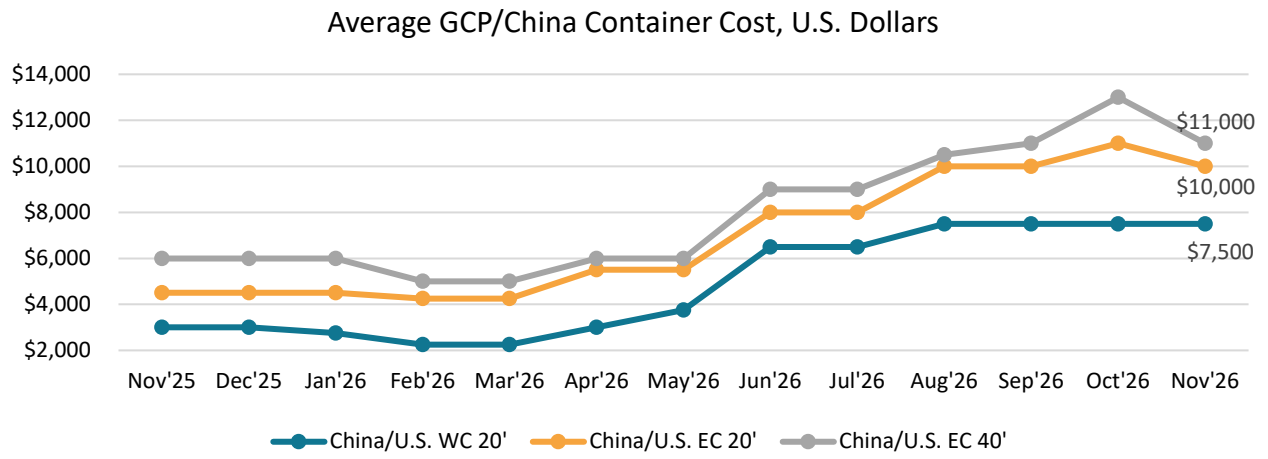
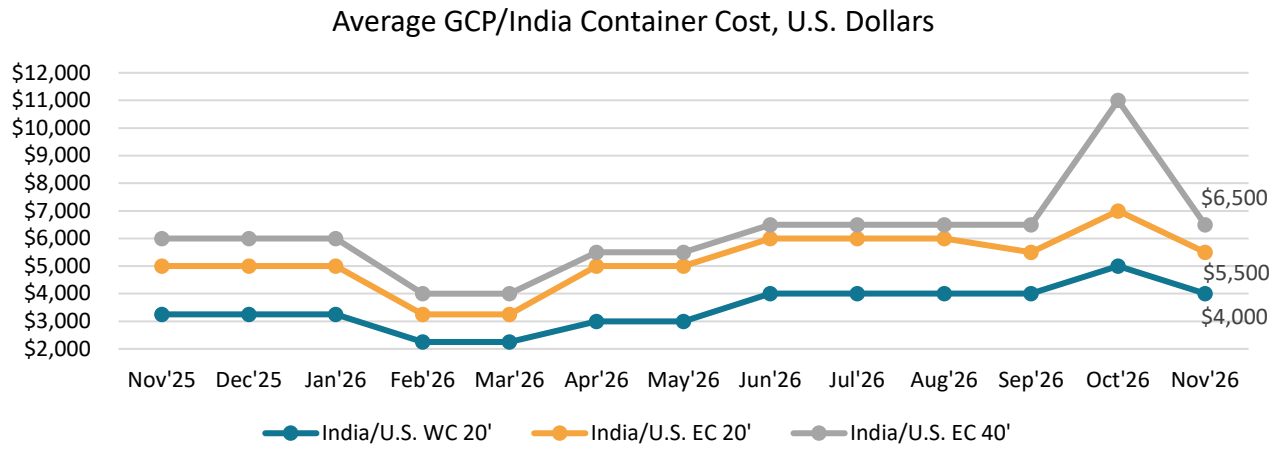
Ocean Freight Rates

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





Key Takeaways:

- Transpacific ocean freight rates remain elevated, driven by demand, capacity constraints, and strong shipments.
- Blank sailings have continued and have removed approximately 4.8% of transpacific ocean capacity in November, in an effort by carriers to keep rates higher. This has increased the risk of cargo rollovers and extended delays. Cargo rolled from one vessel may experience delays of one to two weeks or longer before securing space on a later departure.
- Container shipping rates from Asia to the U.S. are facing downward pressure heading into December, though they remain 80-150% above year-ago levels.

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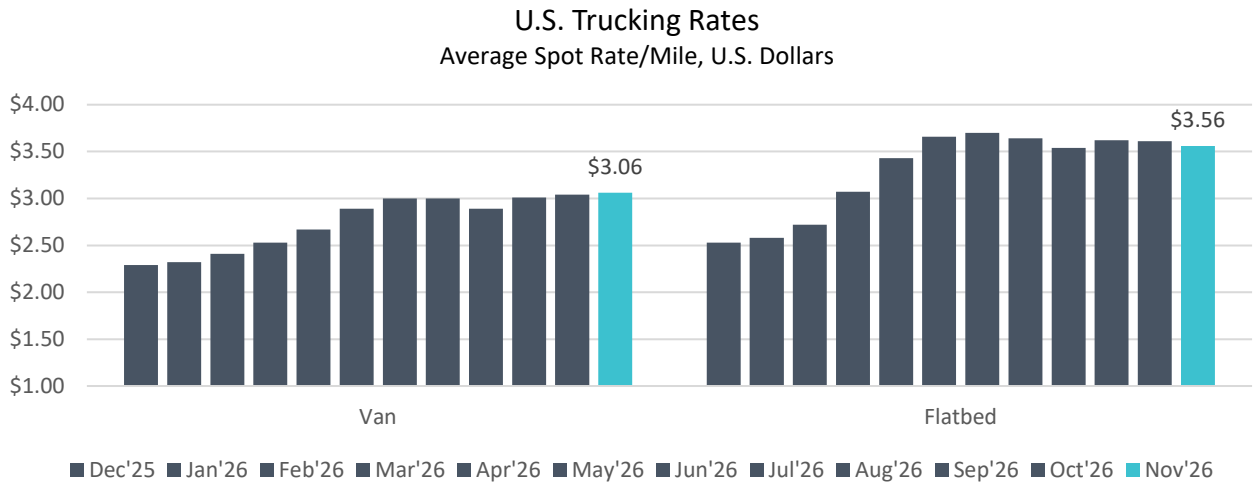
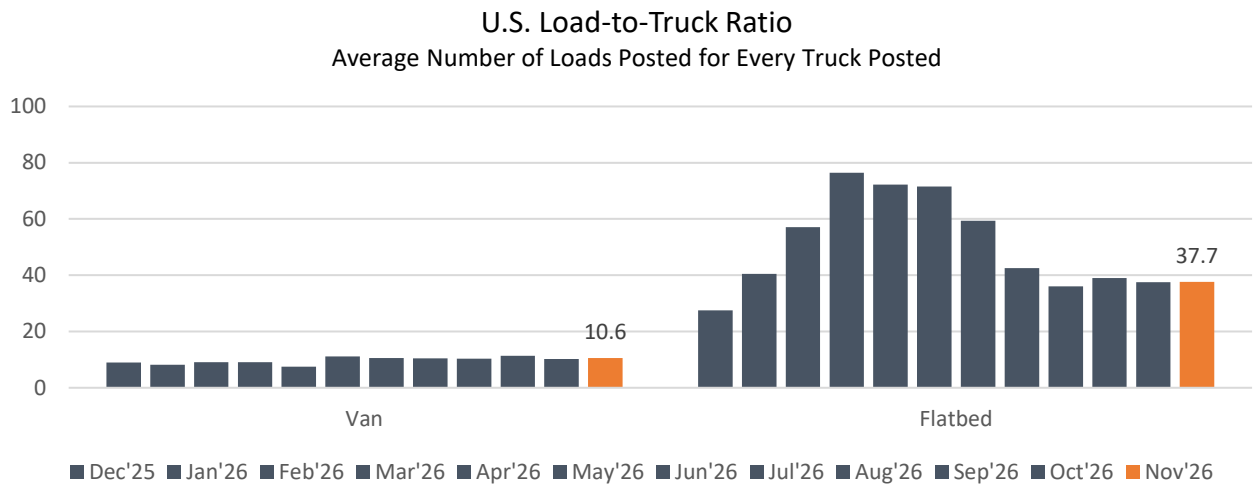
Truckload Shipping





Key Takeaways:

- Rate volatility is expected to increase through the holiday season and into the new year, consistent with typical Q4 trends. Once seasonal disruptions take hold, rates are likely to remain elevated, with limited opportunity for meaningful declines until the new year.

- Capacity is also expected to tighten from Thanksgiving through December as drivers take time off for the holidays. With fleet expansion remaining limited and few new drivers entering the market, equipment utilization is likely to stay near 100% through the first quarter of 2027.

- Looking ahead, while softer overall demand could help contain upward pressure on rates, already-tight capacity and reduced driver availability during the holiday period leave the market particularly vulnerable to a major weather event or other unexpected disruption.

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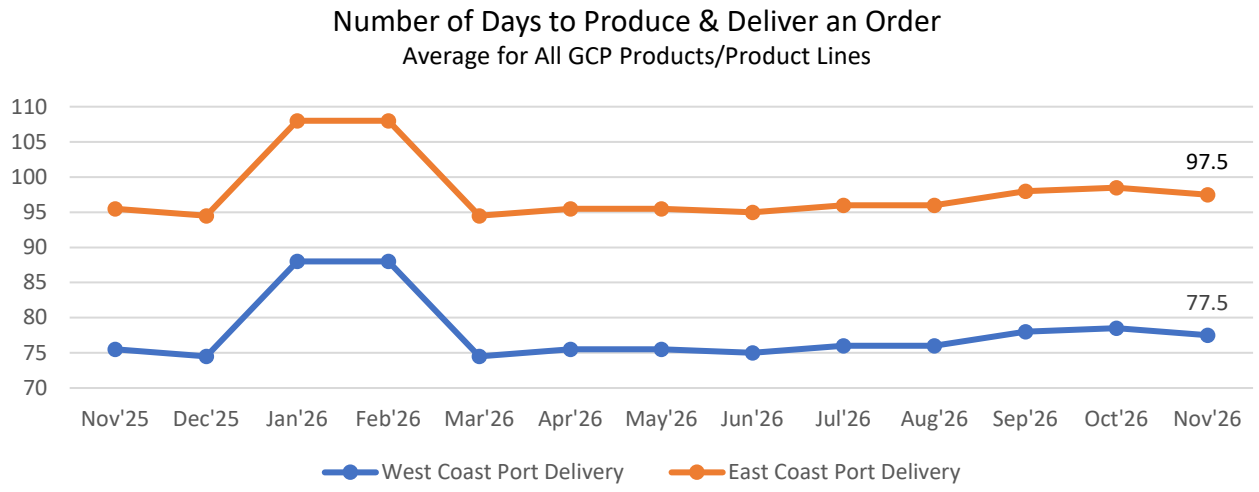
GCP Production Times



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's average order fulfillment lead times improved slightly in November, declining by one day to 77.5 days for West Coast deliveries and 97.5 days for East Coast deliveries. This marks the first improvement since June, following several months of gradually increasing lead times. While this suggests some stabilization across GCP's supply chain, overall lead times remain slightly elevated compared to earlier in the year. With container booking times continuing to average 14 days and the Chinese New Year production shutdown approaching, advance order planning remains important.

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