

COUNTRY MARKET INTELLIGENCE

United States Market Intelligence

Market structure, procurement and commercial entry

October 2026

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Reading this report

The data retains its stated period, currency and measurement scope. ExpandOcean Views interpret the commercial implications of each analytical module. Sources are linked beside factual claims. Data cutoff: 16 October 2026.

1 Market structure and commercial context

The United States combines a large, diverse domestic buyer base with extensive international sourcing. In 2025, U.S. goods imports reached \$3,438.4 billion on a balance-of-payments basis, while goods exports were \$2,197.5 billion; the goods deficit was \$1,240.9 billion. These totals are annual nominal-dollar goods-trade values, not goods-and-services totals [1]. Buyers range from national chains to regional wholesalers, manufacturers, contractors and online merchants. Large buyers often use formal vendor qualification and centralized purchasing; smaller firms may source through importers, trade shows and digital marketplaces.

The 2025 goods-import mix spans productive capacity and consumer supply: capital-goods imports increased \$165.9 billion year over year, including a \$101.4 billion increase for computers and \$42.7 billion for computer accessories, while automotive vehicles, parts and engines fell \$52.0 billion [1]. These are annual changes, not category totals. Equipment and input buyers evaluate specifications, serviceability and continuity; consumer-channel buyers emphasize assortment, landed cost, packaging and replenishment. Qualify the buyer's route to market, scale, compliance responsibilities and approval cycle before discussing suppliers.

ExpandOcean View

Sell into procurement systems, not a national stereotype

The import total signals commercial depth, but the category-level changes show that opportunity is distributed unevenly and can rotate sharply between capital goods, consumer goods and transport equipment. Frame discovery around buyer type, channel economics and the sourcing problem rather than treating the United States as one homogeneous customer. For each lead, establish whether the decision-maker is a brand, importer, distributor or factory; who owns compliance and inventory; and what evidence will move a supplier onto an approved-vendor list. That qualification makes outreach more relevant and creates a clearer path from first contact to repeat purchasing.

2 Macro purchasing power and finance

Real U.S. GDP grew 2.3% in 2025, measured from the 2024 annual level to the 2025 annual level in BEA's September 2026 annual update [15]. Latest available second-quarter 2026 data show real GDP growth of 2.2% at a seasonally adjusted annual rate from the prior quarter; this quarterly rate should not be compared directly with the 2025 annual growth rate [3]. Current-dollar personal consumption expenditure grew 5.3% in 2025 [3]. The CPI for all urban consumers rose 2.7% from December 2024 to December 2025; the index is not seasonally adjusted and the figure is a year-over-year comparison [4]. These indicators describe a substantial but price-aware market where buyers still face cost and working-capital trade-offs.

The Federal Reserve set its target range for the federal funds rate at 3.75%–4.00% on September 16, 2026 [5]. This is a policy rate, not a direct quote for a buyer's trade finance or loan. Present total cost and cash-cycle information in U.S. dollars, state quote validity and currency exposure, and define payment milestones. Buyers compare landed cost and inventory risk with unit price, especially when carrying stock or funding seasonal assortments. Avoid implying that macro growth guarantees demand for any particular supplier or item.

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Make the buying case cash-cycle aware

GDP and consumer spending establish that U.S. purchasing capacity is broad, while the contemporaneous policy-rate setting and above-target 2025 CPI point to persistent scrutiny of cost and inventory commitments. Your commercial message is stronger when it helps a buyer compare landed cost, lead time, minimum order exposure and replenishment flexibility in a single decision frame. Confirm currency denomination and payment timing early, not only at contract close. This approach supports a practical discussion about procurement economics without implying that national growth rates determine any individual customer's purchase decision.

3 China supply and procurement competition

The United States imported \$308.7 billion in goods from China in 2025, down 29.9% (\$131.7 billion) from 2024, according to USTR's summary [6]. BEA/Census-basis country estimates report Chinese goods imports of \$308.4 billion and a U.S. goods deficit of \$202.1 billion [1]. The \$0.3 billion difference reflects separate published series and bases; they should not be silently combined. China's role remains material, but the decline demonstrates that supplier origin and buyer sourcing choices can shift quickly. China-origin trade statistics are not a count of buyers or procurement contracts. Competition comes from U.S. domestic manufacturers, established importers and distributors, and suppliers in multiple source countries. Importers typically need to coordinate product requirements, supplier documentation, testing, delivery schedules and customs entry through internal teams and external brokers. China-linked sourcing can compete on breadth and production networks, but a buyer's choice also turns on tariff exposure, traceable origin, consistent quality, responsiveness and resilience. Identify relevant importers and wholesalers by category and sourcing model, then approach procurement, operations, product-development and compliance stakeholders with evidence tailored to their role. Trade deficits are not addressable sales.

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Position China sourcing on accountable execution

The 2025 decline in U.S. goods imports from China is a commercial signal to ask how buyers are rebalancing sourcing, not a reason to presume a particular supplier has lost business. Make the first exchange diagnostic: how does the buyer validate factories, maintain production records, manage quality exceptions and compare origin-specific landed cost? Build a credible conversion path around verifiable supplier information and responsive follow-through. Buyers can retain China suppliers while diversifying or changing order allocation, so discovery should uncover the actual procurement trigger rather than leading with broad claims about sourcing advantages.

4 Digital channels and payment

U.S. retail e-commerce sales were estimated at \$340.2 billion in the second quarter of 2026, seasonally adjusted but not adjusted for price changes; this represented 17.1% of total retail sales. E-commerce sales rose 12.2% year over year, compared with 6.7% for total retail sales, on the Census Bureau's stated adjusted series [7]. The bureau said those estimates were to be revised in its third-quarter release, scheduled for November 19, 2026; the figures here are the latest available as of October 16. Digital discovery is important, but procurement does not necessarily close online.

The Federal Reserve's 2025 Diary, based on its October 2024 survey, found consumers averaged 48 monthly payments in 2024: credit cards represented 35% of payments, debit cards 30%, and cash 14%. Remote purchases and person-to-person payments accounted for 23% of purchases and P2P payments [8]. These are consumer behaviors, not B2B settlement shares. Use a clear English-language website, searchable capability information, credible contact channels and prompt responses. Buyers need specifications, quantities, documentation, sampling process, production and shipping terms to request a quote. B2B conversion still usually requires human qualification, sample review and negotiated terms.

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Digital presence should reduce buyer friction

E-commerce's 17.1% share of U.S. retail illustrates the role of online research and transaction channels, while payment diaries describe consumer rather than procurement behavior. Use digital content to support discovery and qualification, not to imply that trade sourcing closes like a retail cart. Create an inquiry path that collects buyer requirements and permits a documented response with specifications, timing and commercial terms. Credit and debit card prevalence in consumer payments is relevant to consumer-facing contexts, but negotiated B2B purchases need separate attention to accepted settlement methods, fraud controls and agreed milestones.

5 Industrial and sector demand mechanisms

Official trade data point to measurable shifts in production-related imports. Capital goods imports rose \$165.9 billion in 2025; computers increased \$101.4 billion, computer accessories \$42.7 billion and telecommunications equipment \$30.3 billion. Industrial supplies and materials imports increased \$23.3 billion, while finished metal shapes increased \$53.6 billion and crude oil fell \$27.6 billion [1]. These are nominal annual changes, not forecasts or category totals. Manufacturers procure against production plans; contractors buy to project schedules; distributors replenish against turnover; retailers follow assortment calendars.

BEA's second-quarter 2026 industry release identified real estate and rental, information, durable-goods manufacturing, and finance and insurance among leading contributors to GDP growth; transportation and warehousing and retail trade were among the leading offsets [3]. This mixture cautions against using a broad expansion narrative as a prospecting shortcut. Translate sector information into buyer research: map manufacturers, distributors, importers and installers; identify procurement roles; and test demand through tenders, supplier-registration pages, trade associations and direct conversations. A sourcing offer must meet defined specifications and delivery windows, not just align with a sector label.

ExpandOcean View**Use sector signals to build prospect lists, not product bets**

The import increase in computing-related capital goods and finished metal shapes, alongside mixed sector contributions in 2026 Q2, suggests that demand has both fast-growing pockets and areas with weaker momentum. Turn these signals into account hypotheses: which U.S. manufacturers, distributors or project suppliers serve those value chains, and what procurement constraints recur? Validate those hypotheses with the buyer's own sourcing needs before proposing supply options. The evidence supports prioritizing research and conversations; it does not identify a winning product or assure that a given account will buy.

6 Import tariffs, taxes and customs

The USITC 2026 Harmonized Tariff Schedule, Revision 21, sets tariff rates and statistical categories [9]. There is no single reliable duty percentage for a country or generic product: classification, origin, customs value, applicable general or special program rates, and any additional Chapter 99 measures matter. China-specific tariff provisions are included in the current schedule and can change. Before quoting, obtain a precise product description, composition, function and origin; classify the item in the HTS and review any current additional duties, trade remedies, quotas or agency requirements. A CBP binding ruling may be requested where classification or treatment needs authoritative resolution [10].

CBP says it does not generally require an import license, but other federal agencies may require permits, licenses or certifications depending on the commodity. The importer of record remains responsible for correctness of entry documents and applicable duties, taxes and fees, even when using a customs broker [10]. Ocean cargo requires an Importer Security Filing before import; noncompliance can lead to penalties, inspections or delay [10]. Federal customs duty is separate from state and local sales taxes. U.S. state and local jurisdictions determine sales tax on purchases, with rates and taxable goods varying across jurisdictions [11]. A landed-cost quote should identify assumptions, party responsible for import entry, duty and fee treatment, Incoterms, and destination tax obligations rather than implying one national sales tax rate.

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Treat tariff classification as part of the quote

The live 2026 HTS schedule makes tariff diligence a recurring transaction task, not a static appendix to a sales proposal. Begin sourcing discussions with a technically accurate product description, origin evidence and buyer/importer identity, then move to tariff classification and any additional measures. Because the importer of record retains responsibility even when a broker files, clarify who supplies records and who obtains customs advice. Firm landed-cost communication depends on stating the customs and tax assumptions instead of embedding an unexplained duty percentage in a unit price.

7 Technical and consumer compliance

Compliance is product-specific and may involve federal and state requirements. FDA's jurisdiction includes foods, drugs, medical devices, radiation-emitting products, cosmetics, dietary supplements and tobacco products, among other categories [12]. FDA entry requirements depend on the product; food, for example, has a prior-notice requirement before it is offered for import, and other regulated categories have distinct controls. CBP's general advice is to check commodity-specific requirements from other federal agencies before importing [10]. Buyers expect suppliers to provide accurate technical files, test reports, labeling artwork, material declarations and traceability records where relevant. Product compliance should be established before commercial scale-up, not inferred from a factory's general export history.

The Uyghur Forced Labor Prevention Act establishes a rebuttable presumption that goods mined, produced or manufactured wholly or partly in Xinjiang Uyghur Autonomous Region, or by an entity on the UFLPA Entity List, are prohibited from U.S. importation under section 307 unless the legal standard for overcoming the presumption is met [13]. CBP states that this standard requires clear and convincing evidence; the importer must conduct due diligence and respond to information requests. This is not a blanket prohibition on all China-made goods. For sourcing, maintain a traceable bill of materials and production chain, supplier and sub-tier records, and evidence that can be produced promptly. Do not make claims of certification or compliance beyond documented evidence.

ExpandOcean View**Documentation quality is conversion infrastructure**

U.S. technical rules and forced-labor enforcement can determine whether a buyer can approve a source at all. The UFLPA's rebuttable presumption is specifically tied to goods connected to Xinjiang or listed entities, and the clear-and-convincing-evidence standard places substantial demands on importers. Procurement conversations should identify documentation owners and traceability gaps early, then align supplier records with the buyer's compliance process. Well-organized evidence affects qualification, customs release and the confidence required for sustained orders.

8 Logistics and commercial entry

The United States is a multi-port, multi-region market. The Bureau of Transportation Statistics provides import-by-country and U.S. port data in shipping weight (short tons) for leading origin countries through 2025, and monthly container-port measures through March 2026 [14]. The data are suitable for comparing gateway patterns, not promising transit times. Port and inland route shape drayage, rail or truck costs, warehouse location and replenishment cadence. Ocean freight plans should account for ISF timing, port handling, customs examination and inland delivery; air freight may suit time-critical requirements but must be evaluated against value and shipment size. For each buyer, establish receiving location, customs-entry responsibility and downstream inventory route.

Organize entry around a buyer segment and credible account list, adapted by geography and channel. National chains may require vendor portals and formal compliance files; regional distributors can offer a more concentrated route to recurring orders; manufacturers and project contractors may require technical qualification and scheduled delivery. Build stages around decision-makers, requirements, sample or pilot review, quotation, compliance clearance and reorder follow-up. Track qualified contacts, meetings, quote-to-order conversion, repeat orders, delivery performance and loss reasons. Qualified accounts are more informative than unqualified traffic.

ExpandOcean View**Choose the gateway with the buyer's replenishment system**

BTS data exposes the physical pattern of U.S. ports and container flows, but the correct entry point is determined by a buyer's receiving footprint and inland distribution network. Make logistics part of account qualification: delivery location, inventory buffer, shipment cadence, customs broker, port and escalation process. Track delivery reliability and reorder behavior alongside lead-generation metrics so that marketing reflects operational performance. This joins discovery to sustained procurement: a successful first shipment matters only if it fits the buyer's receiving process and supports the next replenishment decision.

9 References

Measurement note: Figures are sourced as published and retain each agency's stated period, basis, price adjustment and unit; trade-flow values are not customer counts or sales opportunities. Latest available data as of October 16, 2026 are used, with quarterly and annual measures kept distinct.

For a procurement discussion focused on your U.S. buyer requirements, [contact ExpandOcean](#).

[1] U.S. International Trade in Goods and Services, December and Annual 2025

[3] GDP (Third Estimate), Industries, Corporate Profits, State GDP, and State Personal Income, 2nd Quarter 2026

[4] Consumer Price Index: 2025 in review

[5] Federal Reserve issues FOMC statement, September 16, 2026

[6] The People's Republic of China: China Trade Summary

[7] Quarterly Retail E-Commerce Sales, Second Quarter 2026

[8] 2025 Diary of Consumer Payment Choice

[9] Harmonized Tariff Schedule, 2026 Revision 21

[10] Tips for New Importers and Exporters

[11] How to pay and get help with state and local taxes

[12] Importing FDA Regulated Products

[13] Uyghur Forced Labor Prevention Act

[14] Port Performance Freight Statistics Program

[15] 2026 Annual Update of the National Economic Accounts: Revised 2025 Real GDP