STATESTRAT — SAMPLE PING ALERTS

The alert stream · same-day written deltas · what you receive with Ping (C$600/mo) and Intelligence (C$1,000/mo)

SAMPLE — illustrative. Real evidence from the week of 30 Oct–4 Nov 2026. Pings fire the day a trigger moves; severity is rated watch / elevated / critical. These show the format, severity labels, suggested response and evidence discipline. A full ping stream is scoped to your exposure and thresholds.

PING 001 — 2026-11-01 · [ELEVATED]

COCOA — Côte d'Ivoire: farmer strike over farm-gate price extends to further growing regions

The SYNAPCI union's open-ended strike against the 1,200 FCFA/kg (≈US$2.12) 2026/27 main-crop farm-gate price has spread to additional growing regions since the 1 Sep price set. Farmers' associations reject the 57% cut from the 2025/26 opening rate; deliveries during the main-crop ramp are at risk of slowing, compounding a season already running 8–10 weeks late and tracking −43% y/y port arrivals (173,158 t, season to 1 Nov).

Confidence: HIGH on the strike and price facts (Reuters/CNBC Africa, cocoaIntel, multiple regional outlets); MEDIUM on delivery impact.

Why it matters to you: origin-lot shortfall risk rising into November–December contracting; port congestion forecast (Abidjan/San Pedro) may now get worse, not better.

Suggested response: hold origin-lot commitments to named sellers; book November–December space early; add late-delivery relief language to new contracts.

Evidence: E1–E4, E12–E13 (weekly brief sources).

Next trigger: negotiation announcement, strike suspension, or further regional spread. We alert the day either fires.

PING 002 — 2026-11-04 · [ELEVATED]

STEEL — Midterms delivered a Democratic Congress, not a trade deal; the 50% step-up threat for 1 Jan 2027 stands

The US midterms (3 Nov) produced a Democratic sweep of both the House and the Senate — but no Section 232 agreement with Canada was signed before the election, and the talks that resumed in late October (Commerce Secretary Lutnick re-engaging after the August breakdown) remain without a signed outcome. President Trump has stated a "concept of a deal" with the PM, yet the announced 50% tariff on Canadian steel and autos from 1 Jan 2027 has not been withdrawn. A Democratic Congress can pass repeal bills, but the Section 232 tariffs were imposed by executive order and a Trump veto would require a two-thirds majority to override — widely assessed as out of reach. Lame-duck presidents keep executive trade authority intact.

Confidence: HIGH on the election outcome and tariff status (NPR, CNN, Reuters, CBC, CRS); MEDIUM on the deal timeline.

Why it matters to you: fastener landed cost into 2027 is still exposed to a binary outcome — deal (relief) or 1 Jan step-up (re-price). Democratic control changes the politics, not the executive authority.

Suggested response: model landed cost under both outcomes for your committed volumes; hold reallocation decisions until talks conclude; keep alternate-origin quotes warm in case of the 1 Jan step-up.

Evidence: Reuters (26 Oct); CTV/Bloomberg (2 Nov, Lutnick re-engagement); NPR/CNN results (3–4 Nov); CBC (4 Nov, Carney "asking less and offering more"); CRS IN12519.

Next trigger: a signed Section 232 agreement (tariff reductions) or a confirmed 1 Jan 2027 step-up (cost re-price). We alert the day either fires.

PING 003 — 2026-11-03 · [WATCH]

MANUFACTURING — China rare-earth stand-down enters its expiry window (November 2026)

The October-2025 Trump–Xi suspension of China's rare-earth export measures runs only to November 2026; Beijing can resume those measures (five added REEs, equipment, technologies, personnel-expertise rules) without new legal action. The April-2025 controls and Announcement 61's extraterritorial 0.1%-content licensing rule remain in force regardless. China used rare-earth leverage against Japan in 2026 over Taiwan policy.

Confidence: HIGH on the expiry date and architecture (CSIS, Andersen Institute, Freshfields, European Parliament EPRS); MEDIUM on resumption timing.

Why it matters to you: any manufacturing input containing rare-earth magnets (motors, servos, sensors, electronics) or made with Chinese-processed material has licensing risk on both sides of the Pacific.

Suggested response: request written export-licence status from suppliers now; dual-source magnet-bearing SKUs; review Incoterms so risk transfer is explicit while the window is open.

Evidence: E1–E4 (weekly brief sources).

Next trigger: any MOFCOM announcement extending or resuming the measures — we alert the day it publishes.

Sample pings v1 — format identical to paid service; dates honest; evidence-tagged. Run your own thresholds: we alert when YOUR trigger moves, not the world's.