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Under pressure

COVID-19 related disruptions in mainland China weighed on the global manufacturing and services PMIs in April, offsetting some resilience in activity elsewhere. Meanwhile, as HSBC economists explain, higher input costs continue to put upward pressure on output prices in the developed economies.

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But for the China stumble

There was a decent bounce in regional manufacturing in April, if it wasn't for the growth stumble in mainland China. But, says HSBC's Frederic Neumann, challenges in China are likely to ripple through the region in the next few months. The risks to growth are building all around.

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HSBC's Simon Wells says resilient activity surveys and labour market strength suggest businesses in Europe remain remarkably optimistic despite high inflation. This is in stark contrast to weak consumer confidence.

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FX update, global data, UK & Brexit

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