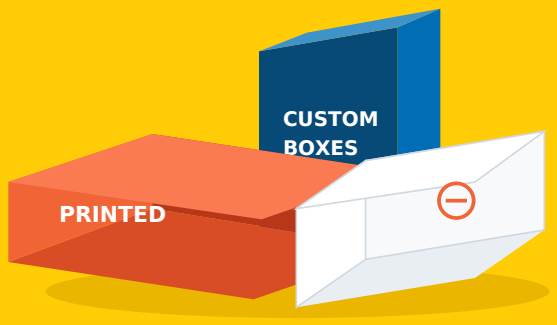
Packaging Market Pulse



GCC + NORTH AMERICA

Materials, freight and demand signals for custom printed packaging.

THIS WEEK AT A GLANCE

$140/TON
High end of announced medium price increase

40.25%
FedEx U.S. international fuel surcharge

$4,297
Drewry WCI per 40-ft container

CONFIRMED

North American board pricing turns sharply upward

What changed

Cascades: +$110/ton liner/white-top and +$140/ton medium from Sept. 8. International Paper: +$80/ton; Smurfit Westrock: +$100/ton from Sept. 1. SBS/FBB rises of 4%-6% were also announced.[1]

Why it matters

Nearly 10% of capacity has been removed. Q2 operating rates approached 95%, inventories hit a 15-month low and box shipments rose 0.9% YoY.[2] Producer leverage is improving despite a modest demand recovery.

ACTION

Shorten quote validity, add a material-adjustment clause and pre-book critical Q4 board grades.

CONFIRMED SIGNAL

Gulf deliveries and end-demand face friction

Beiersdorf said the conflict disrupted deliveries into Saudi Arabia and the UAE, raised operating costs and weakened consumption. Sustained oil strength would also raise plastic-packaging input costs.[3]

Practical move: dual-source plastic components and hold targeted safety stock for fast-moving formats - not blanket inventory.

FORECAST

Ocean freight rebounds as U.S. demand shifts

WCI: +1% to $4,297/40-ft; Shanghai-LA: +3%; Shanghai-NY: +4%.[4] August U.S. retail imports are forecast -4.2% YoY.[5]

Practical move: rebid spot lanes; avoid excess finished-box inventory.

SOURCES & DATES

[1] Packaging Dive, updated Aug. 3 [2] Packaging Dive / AF&PA, Aug. 3 [3] Reuters, Aug. 3

[4] Drewry WCI, Aug. 6 [5] Reuters / Global Port Tracker, Aug. 7

Market intelligence only. Announced producer increases are not the same as fully realized transaction prices. Figures are public-source data and may differ by grade, lane, origin, contract and account.

DHL, FedEx & UPS

Public U.S. surcharge tables | Week of Aug. 10-16

Use account invoices for final decisions: fuel applies to different eligible-charge baskets and negotiated terms can materially change the all-in result.

DHL

OFFICIAL TABLE

Export: 30.50%
Import: 34.25%
Aug. 17-23: 31.75% / 35.50%

+1.50 pts vs prior week

Commercial impact
A rising fuel curve lifts express landed cost; remote-area delivery is $50 or $0.50/lb, whichever is higher.

DO NOW

Check postal-code remote fees before promising freight-included pricing.

FedEx

OFFICIAL TABLE

International: 40.25%
Domestic air: 28.75%
Ground: 26.25%

+0.25 pt international

Commercial impact
International fuel is now far above Ground. Fuel can also apply to handling, area and clearance-related surcharges.

DO NOW

Audit top GCC-U.S./Canada lanes at billed, not quoted, cost.

UPS

OFFICIAL TABLE

Ground: 27.00%
Domestic air: 29.25%
Intl export/import: 40.75% / 43.50%

Effective Aug. 10

Commercial impact
The public U.S. import percentage is the highest of the three tables shown, but base rates and account terms still decide the winner.

DO NOW

Run an all-in three-carrier bid on the top 20 shipment profiles.

DIM WEIGHT: flat or collapsible packaging can cut chargeable weight and fuel exposure.

U.S. CUSTOMS - OCT. 1: MPF min $34.58; max $670.86; rate stays 0.3464%.

Three priority actions

1. Protect paper margin
   Use 14-day validity, indexed material clauses and Q4 allocation checks.
2. Reduce parcel cube
   Standardize right-size shippers; test flat/collapsible rigid formats.
3. Renegotiate total landed cost
   Bid base, fuel, remote, demand, brokerage and DIM charges together.

Watch next

- Sept. board-hike realization
- DHL Aug. 17 fuel step-up
- Gulf airspace and capacity
- Crude-to-plastics pass-through
- U.S. import slowdown
- Carrier demand surcharges

CARRIER & CUSTOMS SOURCES

DHL U.S., Aug. 10 week | FedEx U.S., Aug. 10 week | UPS U.S., effective Aug. 10 | FedEx / CBP fee notice

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