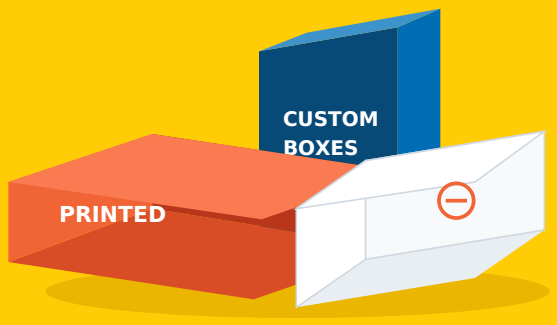
Packaging Market Pulse



GCC + NORTH AMERICA

Materials, freight and demand signals for custom printed packaging.

THIS WEEK AT A GLANCE

50%
Added U.S. duty on selected Canadian packaging

+12.2%
U.S. e-commerce sales, Q2 year over year

$9,507
Shanghai-New York per 40-ft, +9% WoW

EFFECTIVE AUG. 22

Canada-U.S. tariff shock reaches packaging

What changed

Selected Canadian imports now face an additional 50% U.S. duty. The official annex includes certain corrugated boxes, paper sacks/bags, other packing containers, labels and plastic packaging HTS codes.[1]

Why it matters

USMCA status does not shield covered goods. Canada says its Sept. 8 dollar-for-dollar response will include U.S. pulp and paper; the detailed product list is pending.[2]

ACTION

Freeze automatic Canada-U.S. quotes. Require COO, HTS and duty approval; price DDP only after broker confirmation.

CONFIRMED DEMAND

U.S. e-commerce demand stays strong

Q2 online sales reached $340.2B, up 3.8% QoQ and 12.2% YoY. E-commerce represented 17.1% of total retail sales.[3]

Practical move: keep standard mailer and shipper capacity ready, but use short replenishment cycles after July's softer retail reading.

COST SIGNAL

Resin eases; freight moves against buyers

Canadian plastic resin fell 4.3% MoM, but remains 46.3% higher YoY.[4] WCI rose 4% to $4,526; Shanghai-New York and Los Angeles both gained 9%. Hormuz AIS traffic is about 90% below pre-conflict levels.[5]

Practical move: negotiate resin now; book trans-Pacific early and keep a targeted Gulf delivery buffer.

SOURCES & DATES

[1] White House tariff annex and Reuters, effective Aug. 22 [2] Reuters / Canada response, Aug. 22

[3] U.S. Census, Aug. 18 [4] Statistics Canada, Aug. 20 [5] Drewry, Aug. 20; Reuters, Aug. 24

Market intelligence only. Tariffs apply by exact HTS classification and origin, not product nickname. No material new GCC or North American packaging capacity addition/closure was verified Aug. 17-24. Figures can differ by grade, lane, contract and account.

DHL, FedEx & UPS

Public U.S. surcharge tables | Week of Aug. 24-30

Illustrative surcharge only. Base rates, discounts, eligible-charge baskets and account terms determine the real landed cost.

DHL

OFFICIAL TABLE

Export: 32.25%
Import: 36.00%
Aug. 31-Sept. 6: 32.75% / 36.50%

+0.50 pt WoW

Commercial impact
$1,000 of fuel-assessable charges costs $5 more this week and another $5 next week. Fuel also applies to many accessorials.

DO NOW

Consolidate remote drops; request a fuel cap or accessorial exclusion.

FedEx

OFFICIAL TABLE

International: 40.50%
Domestic air: 29.00%
Ground: 26.75%
Express freight: $0.660/lb

+2.00 pts intl WoW

Commercial impact
$1,000 of eligible international charges costs $20 more; 1,000 lb of Express Freight adds $28 in fuel.

DO NOW

Re-rate urgent Gulf jobs; compare billed cost, not headline base rate.

UPS

OFFICIAL TABLE

Ground: 27.25%
Domestic air: 29.50%
Export/import: 41.00% / 43.75%

+2.00 pts intl WoW

Commercial impact
Ground rose 0.50 point and domestic air 1.75 points. Each $1,000 of eligible international charges adds $20.

DO NOW

Run a three-carrier lane bake-off; validate the current ship-date row.

GULF RISK: Hormuz AIS traffic is about 90% below normal; promises need buffer.

OCEAN: WCI +4%; Shanghai-New York and Los Angeles both +9% WoW.

Three priority actions

1. Stop automatic Canada-U.S. pricing
   Audit COO/HTS and obtain broker duty approval before DDP quotes.
2. Rebid parcel air now
   All three carriers rose; negotiate fuel caps and consolidate remote drops.
3. Lock freight and feedstock
   Book ocean early; use targeted resin stock and short quote validity.

Watch next

- Canada Sept. 8 tariff list
- DHL Aug. 31 fuel step-up
- Hormuz carrier alerts
- Trans-Pacific blank sailings
- Sept. board-hike realization
- Canada/U.S. trade talks

CARRIER & CUSTOMS SOURCES

DHL U.S., Aug. 24-30 | FedEx U.S., Aug. 24-30 | UPS U.S., Aug. 24 ship-date table

Service alerts: FedEx, checked Aug. 24 | UPS UAE, checked Aug. 24 | DHL Middle East, checked Aug. 24. No new base-rate, DIM or broad suspension change verified this week.

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