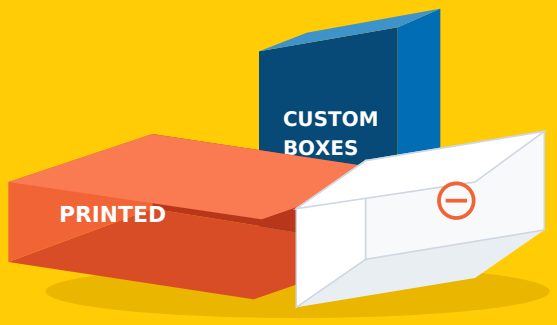
Packaging Market Pulse



GCC + NORTH AMERICA

Materials, freight and demand signals for custom printed packaging.

THIS WEEK AT A GLANCE

$170/t
U.S. linerboard rise YTD to September

AED50M
New Dubai food-packaging facility

-1%
Drewry WCI week over week

BOARD PRICING

Price gains outpace cost inflation

What changed

U.S. linerboard prices were up $170/ton year to date by September, versus about $100/ton of estimated underlying cost inflation. About 10% of capacity was removed in 2025; Q2 operating rates reached 95%, with 97% estimated to hold inventories flat.[1]

Why it matters

Supply is tight, but the $70/ton gap gives buyers a basis to challenge unsupported pass-through. The DOJ subpoenaed four producers in a grand-jury pricing investigation; this is an unproven early signal, not a finding of wrongdoing.[2]

ACTION

Request supplier cost bridges, retain competing quotes and use index-based quarterly reopeners instead of accepting the full $170/ton as automatic cost recovery.

UAE CAPACITY

Dubai adds private-label food capacity

NRTC opened an AED50 million, 60,000+ sq. ft. facility in Jebel Ali for semi-automated fresh-food processing and customised bulk and private-label packaging.[3]

Action: approach NRTC and its QSR, retail and hospitality customers with food-safe printed sleeves, cartons, labels and short-run private-label formats.

DEMAND + CONTRACTS

Food cartons stronger; pricing resets faster

Graphic Packaging's Q3 volumes rose 1%, led by bars, snacks and prepared meals, while household, foodservice and QSR cups softened. It is moving contract price openers from semiannual to quarterly.[4]

Practical move: target value/private-label food packaging and adopt quarterly material-and-freight reopeners on long-running customer programs.

SOURCES & DATES

[1] Fastmarkets, Nov. 3 [2] Packaging Dive, Nov. 4-6

[3] Packaging MEA, Nov. 6 [4] Packaging Dive, Nov. 3

Confirmed: published price/cost estimates, facility opening, company demand results, official carrier tables and Drewry index. DOJ pricing review and Hormuz navigation impact remain early signals.

DHL, FedEx & UPS

Public surcharge tables | Week of Nov. 9-15

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

DHL

OFFICIAL TABLE

U.S. Express export: 37.75%
U.S. Express import: 41.50%
Prior week: 37.50% / 41.25%
Fuel also applies to key accessorials.

+0.25 pt WoW

Commercial impact
Adds $2.50 per $1,000 eligible charges; remote-area, oversize and demand fees can compound.

DO NOW

Seek fuel and accessorial discounts, not only base-rate concessions.

FedEx

OFFICIAL TABLE

U.S. international: 44.75%
Domestic air: 34.00%
Ground: 30.50%
UAE last posted: 53.50% (Nov. 2-8)

Intl -1.00 pt; Ground +1.25

Commercial impact
U.S. international saves $10 per $1,000, but Ground adds $12.50 and air adds $7.50. UAE's Nov. 9 row was not yet posted.

DO NOW

Shift eligible U.S. exports to FedEx; live-rate UAE shipments before release.

UPS

OFFICIAL TABLE

Calculated U.S. Ground: 30.00%
Domestic air: 33.50%
Intl export/import: 45.25% / 48.00%
Official Nov. 9 history row pending.

Estimated: Ground -0.25 pt

Commercial impact
Official index tables imply small relief versus Nov. 2, but UPS had not posted the weekly history row at access time.

DO NOW

Do not promise UPS landed cost until a live quote confirms fuel.

OCEAN: WCI -1% to $4,389; Shanghai-NY -3%.

GCC: Saudi attacks + Hormuz-aid report keep risk high.

Three priority actions

1. Demand board-cost evidence
   Use quarterly index reopeners; reject unsupported full-price pass-through.
2. Re-rate by carrier and service
   FedEx international eased, while U.S. Ground and air became costlier.
3. Pursue Dubai food packaging
   Pitch private-label formats while retaining GCC delivery contingencies.

Watch next

- DOJ board-price review
- Supplier cost bridges
- NRTC onboarding
- FedEx Nov. 23 peak fees
- UPS posted fuel row
- Hormuz navigation aids
- Saudi air reliability

CARRIER & CUSTOMS SOURCES

DHL U.S. | FedEx U.S. | FedEx UAE | UPS U.S.; accessed Nov. 9

Drewry WCI, Nov. 5 | Reuters Saudi, Nov. 8 | Reuters Hormuz, Nov. 9

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