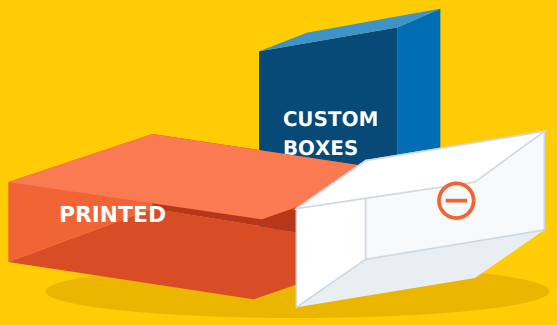
Packaging Market Pulse



GCC + NORTH AMERICA

Materials, freight and demand signals for custom printed packaging.

THIS WEEK AT A GLANCE

400+
Jobs affected at idled Quebec board mill

$495.85
GCC testliner index per tonne

$4,351
Drewry WCI per 40-ft container

CAPACITY + TARIFFS

Canada cuts paperboard capacity

What changed

RYAM idled its Temiscaming, Quebec, pulp and paperboard mill, affecting 400+ workers; it ships about 75% of its paperboard to the U.S.[1] Supremex estimates tariffs will cut annualized operating earnings by C$10M-C$12M and will eliminate 60 jobs while consolidating carton production.[2]

Why it matters

This is the clearest realized impact yet from the U.S.-Canada packaging trade conflict. Canadian paperboard availability and cross-border folding-carton lead times could tighten even if wider North American supply remains adequate.

ACTION

Require country-of-origin and mill declarations before quoting Canada-U.S. jobs. Dual-source paperboard and carton capacity; keep duties outside fixed DDP pricing.

FREIGHT + RELIABILITY

Ocean falls; Gulf reliability worsens

Drewry's WCI fell 2% to $4,351/40-ft; Shanghai-Los Angeles declined 3% to $7,624 and Shanghai-New York fell 2% to $10,220. Only four transpacific blank sailings were posted for next week, down from eleven.[3] Hormuz traffic hit a two-month low: just seven commodity vessels crossed on Oct. 6.[4]

Action: rebid ocean; retain Gulf risk clauses.

DEMAND SIGNAL

Smaller packs gain ground

NielsenIQ reports smaller sizes are outgrowing multiserve packs in soft drinks, cereal and salty snacks. 21% of U.S. households had a GLP-1 user in May, while online grocery trips are less likely to be stock-up purchases.[5]

Practical move: pitch smaller folding cartons, portion packs and trial-size structures with strong digital-shelf artwork. Test short runs before committing tooling.

SOURCES & DATES

[1] Packaging Dive / RYAM, Oct. 9 [2] Packaging Dive / Supremex, Oct. 7

[3] Drewry WCI, Oct. 8 [4] Reuters / Hormuz, Oct. 8 [5] Packaging Dive / NielsenIQ, Oct. 7

Confirmed: Canadian facility actions, GCC indices and freight data. Demand signal: smaller packs are gaining in selected grocery categories, but not yet across all packaged goods.

DHL, FedEx & UPS

Public surcharge tables | Week of Oct. 12-18

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

DHL

OFFICIAL TABLE

U.S. Express export: 37.00%
U.S. Express import: 40.75%
Oct. 19 posted: 37.50% / 41.25%
Origin/account rules can differ.

+0.75 pt WoW

Commercial impact
This week adds $7.50 per $1,000 eligible charges. Another 0.50-point increase is already posted for Oct. 19.

DO NOW

Re-rate now and Oct. 19; seek fuel and demand-fee discounts.

FedEx

OFFICIAL TABLE

U.S. international: 44.50%
Domestic air: 32.25%
Ground: 28.75%
UAE international: 51.75%

+0.25 pt U.S. intl

Commercial impact
U.S. international adds $2.50 and UAE adds $5 per $1,000 eligible charges. Ground fell 0.50 point; demand fees continue.

DO NOW

Re-rate by service; use Ground for nonurgent U.S. parcels.

UPS

OFFICIAL TABLE

U.S. international export: 45.00%
U.S. international import: 47.75%
Domestic air: 32.75%
Ground: 29.25%

+0.25 pt intl air

Commercial impact
International air adds $2.50 per $1,000 eligible charges. Ground fell 0.50 point; holiday and GCC-US surge fees remain.

DO NOW

Compare UPS Ground and FedEx Ground; consolidate bulky parcels.

GCC BOARD: Testliner fell 0.70%; fluting declined 0.37%.

OCEAN: WCI fell 2%, but Hormuz reliability deteriorated.

Three priority actions

1. Protect Canada-U.S. quotations
   Verify origin, mill and duties; dual-source board and carton capacity.
2. Re-rate all express services
   Fuel rose on air; U.S. Ground eased. Compare complete invoice cost.
3. Rebid ocean, retain Gulf buffers
   Capture lower spot rates without absorbing war-risk and delay costs.

Watch next

- Canada mill continuity
- DHL Oct. 19 fuel rise
- FedEx/UPS demand fees
- Hormuz vessel attacks
- Post-holiday ocean FAKs
- Smaller-pack demand

CARRIER & CUSTOMS SOURCES

DHL U.S. | FedEx U.S. | FedEx UAE | UPS U.S.; accessed Oct. 12

Fastmarkets GCC board, Oct. 8 | No new broad DIM, remote-area, customs-brokerage or GCC-North America express suspension was verified Oct. 6-12.

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