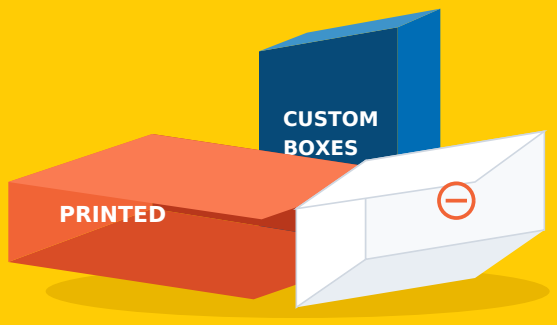
Packaging Market Pulse



GCC + NORTH AMERICA

Materials, freight and demand signals for custom printed packaging.

THIS WEEK AT A GLANCE

50% → 0
U.S. tariff on listed Canadian cartons

FLAT
North American containerboard, October

$4,585
Drewry WCI per 40-ft container

TRADE + LANDED COST

U.S. lifts tariff on key Canadian boxes

What changed

A U.S. order removes selected Canadian forestry goods from the additional Section 338 tariff list for entries from Oct. 30. The official annex includes corrugated cartons 4819.10.00, paper sacks/bags 4819.40.00, molded-pulp articles 4823.70 and other paper-pulp articles.[1]

Why it matters

The removal can eliminate a 50% U.S. border cost on qualifying Canadian packaging, restoring viable cross-border sourcing. It does not automatically remove Canada's counter-tariffs or cover every paper product.

ACTION

Reopen only the listed Canada-to-U.S. lanes after a broker confirms origin, HTS code and Oct. 30 entry date. Keep reciprocal Canadian duties separate.

CAPACITY + DEMAND

PCA volumes rise; price remains the focus

PCA's Q3 shipments increased 11% YoY, helped by acquired capacity, while e-commerce kept growing at a slower pace. Agriculture and beef packaging remained weak. Management said pricing is its top focus as input costs rise.[2]

Action: defend corrugated pass-throughs, but segment by end market; avoid assuming broad demand strength.

GCC RELIABILITY

Riyadh reopens, but risk stays high

Riyadh airport partially reopened international operations for Saudi carriers after the shutdown, but traffic remained limited. Separately, October became the worst month on record for commercial-ship attacks in the Gulf.[3][4]

Practical move: stop treating RUH as fully closed, but confirm uplift before booking and retain 2-3 contingency days plus war-risk and fuel clauses.

SOURCES & DATES

[1] White House annex, Oct. 23; effective Oct. 30 [2] Packaging Dive / PCA Q3, Oct. 23

[3] Reuters, Oct. 24 [4] Reuters, Oct. 23

Confirmed: official U.S. tariff annex, carrier schedules and published freight index. Riyadh normalization is partial; newly claimed attacks remain unconfirmed and are excluded from the figures above.

DHL, FedEx & UPS

Public surcharge tables | Week of Oct. 26-Nov. 1

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

DHL

OFFICIAL TABLE

U.S. Express export: 37.25%
U.S. Express import: 41.00%
Prior week: 37.50% / 41.25%
Nov. 2 posts a 0.25-pt rebound.

-0.25 pt WoW

Commercial impact
Saves $2.50 per $1,000 of eligible charges, but the relief is temporary under DHL's already-published Nov. 2 table.

DO NOW

Use this week's table now; do not bake the dip into long-validity quotes.

FedEx

OFFICIAL TABLE

U.S. international: 45.00%
Domestic air: 32.50%
Ground: 29.00%
UAE Regional: 18.00% (flat)

Intl / air +0.50 pt

Commercial impact
Adds $5 per $1,000 of eligible international or air charges; Ground adds $2.50. UAE domestic also rises to 18.5%.

DO NOW

Re-rate open U.S. quotes; compare Regional for eligible GCC lanes.

UPS

OFFICIAL TABLE

Canada domestic Standard: 53.00%
Canada to U.S. Standard: 23.50%
Canada international: 42.25%
Canada domestic express: 38.75%

Intl / domestic +0.50 pt

Commercial impact
Adds C$5 per C$1,000 on domestic Standard, international and express eligible charges; Canada-U.S. Standard adds C$2.50.

DO NOW

Re-rate Canada lanes; live-rate U.S. exports before carrier switching.

OCEAN: Drewry WCI rose 2% to $4,585/40-ft.

KSA: RUH partially reopened; uplift remains lane-dependent.

Three priority actions

1. Reopen qualifying Canada-U.S. lanes
   Require broker-confirmed HTS, origin and Oct. 30 entry date.
2. Re-rate FedEx and UPS now
   Fuel rose; DHL's small dip reverses under its Nov. 2 table.
3. Keep GCC contingency clauses
   RUH improved, but Gulf shipping and insurance risk remain high.

Watch next

- Canada counter-tariff response
- DHL rebound Nov. 2
- UPS U.S. live table
- FedEx UAE international fuel
- RUH traffic normalization
- Gulf ship attacks

CARRIER & CUSTOMS SOURCES

DHL U.S. | FedEx U.S. | FedEx UAE | UPS Canada; accessed Oct. 26

Drewry WCI, Oct. 22 | No new broad base-rate, DIM or remote-area rule was verified Oct. 20-26.

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