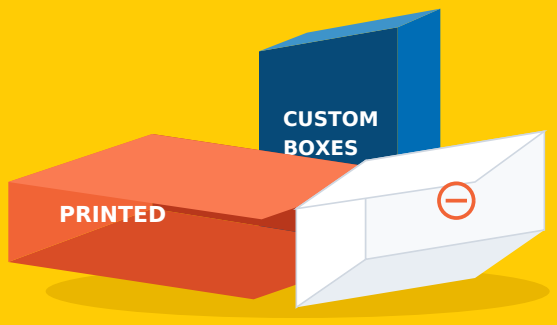
Packaging Market Pulse



GCC + NORTH AMERICA

Materials, freight and demand signals for custom printed packaging.

THIS WEEK AT A GLANCE

-5.9%
U.S. plastic-resin PPI, July month over month

+1.9%
U.S. paper boxes/containers PPI, July MoM

$8,706
Shanghai-New York per 40-ft, +10% WoW

CONFIRMED

Raw resin falls; finished packaging stays firm

What changed

July U.S. producer prices: plastic resins -5.9% MoM, but plastic packaging +0.6%; paperboard +1.1%; paper boxes/containers +1.9%; metal containers +1.4%.[1]

Why it matters

Input relief has not passed through to finished plastic packs: plastic packaging remains +7.5% YoY. Paper boxes are +3.0% YoY, supporting disciplined quote validity even without a new capacity announcement this week.

ACTION

Use 14-21 day quote validity. Push resin suppliers for relief, but keep board and finished-pack escalation clauses.

DEMAND SIGNAL

U.S. retail pullback favors leaner runs

July retail sales fell 0.6% MoM, the first decline in nine months. Nonstore sales fell 2.2%, partly because Prime Day shifted to June; total retail was still +5% YoY.[2]

Practical move: offer shorter replenishment runs and avoid overbuilding e-commerce mailers after the June pull-forward.

FREIGHT RISK

Hormuz slows as trans-Pacific tightens

Only 5 commodity vessels crossed Hormuz Saturday and none Sunday, versus 31 the prior weekend; Brent gained 6% for the week.[3] WCI rose 1% to $4,339; Shanghai-New York jumped 10%; seven blank sailings are planned next week.[4]

Practical move: book early, compare West vs East/Gulf routings and hold targeted critical stock.

SOURCES & DATES

[1] U.S. BLS PPI table, Aug. 13 [2] Reuters / U.S. Census, Aug. 14 [3] Reuters / shipping data, Aug. 16

[4] Drewry WCI, Aug. 13 | Reuters / oil, Aug. 14

Market intelligence only. No material new GCC or North American packaging capacity addition/closure was verified Aug. 10-17; pricing, demand and freight drive this issue. Figures can differ by grade, lane, origin, contract and account.

DHL, FedEx & UPS

Public U.S. surcharge tables | Week of Aug. 17-23

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

DHL

OFFICIAL TABLE

Export: 31.75%
Import: 35.50%
Aug. 24-30: 32.25% / 36.00%

+1.25 pts WoW

Commercial impact
$1,000 of fuel-assessable charges costs $12.50 more this week. Remote area: $50 or $0.50/lb, whichever is higher.

DO NOW

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

FedEx

OFFICIAL TABLE

International: 38.50%
Domestic air: 27.25%
Ground: 26.00%
Express freight: $0.632/lb

-1.75 pts intl WoW

Commercial impact
$1,000 of eligible international charges costs $17.50 less. Fuel still compounds area, handling, oversize and demand fees.

DO NOW

Pull live quotes now; confirm service acceptance before shifting urgent Gulf freight.

UPS

OFFICIAL TABLE

Last confirmed Aug. 10
Ground: 27.00%
Domestic air: 29.25%
Export/import: 40.75% / 43.50%

RE-RATE AT SHIP TIME

Commercial impact
No new Aug. 17 row was visible on the official U.S. page at issue time. Do not use an index estimate for customer pricing.

DO NOW

Use UPS live rating/API and compare billed-cost profiles with DHL and FedEx.

MIDDLE EAST: service continues, but transit can extend and guarantees may not apply.

U.S. CUSTOMS: low-value imports stay dutiable; confirm IOR and nonrefundable fees.

Three priority actions

1. Rebid parcel lanes now
   Test 10 representative shipments; negotiate fuel and accessorial caps.
2. Defend quote margin
   Use 14-21 day validity; push resin relief while protecting board.
3. Harden delivery promises
   Add a 1-day internal Gulf buffer; use correct COO/HTS and DDP terms.

Watch next

- Aug. 18 U.S. e-commerce
- Aug. 20 Canada producer prices
- DHL Aug. 24 fuel step-up
- UPS current fuel row
- Hormuz carrier alerts
- Sept. Panama surcharges

CARRIER & CUSTOMS SOURCES

DHL U.S., Aug. 17-23 | FedEx U.S., Aug. 17-23 | UPS U.S., checked Aug. 17 | Reuters / U.S. trade court, Aug. 13

Service alerts: FedEx, updated July 20 | UPS UAE, checked Aug. 17 | DHL Middle East, checked Aug. 17

Need smarter, shipping-efficient custom packaging?

Custom printed boxes, corrugated and rigid packaging with free design support.

iCustomBoxes.com

support@icustomboxes.com | +1-800-347-2197