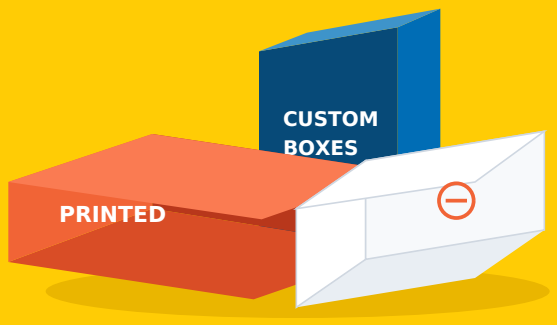
Packaging Market Pulse



GCC + NORTH AMERICA

Materials, freight and demand signals for custom printed packaging.

THIS WEEK AT A GLANCE

+0.9%
U.S. paperboard PPI in October

$50M
Planned RAK packaging expansion

+79%
MESA-USA air rate year over year

CANADA TRADE

Relief extended; paperboard clock starts

What changed

Canada extended broad tariff remission to 30 June 2028 and added qualifying non-steel goods used to package food and beverages. Relief for certain paperboard products is scheduled to end 1 February 2027 as domestic supply comes online.[1]

Why it matters

Qualifying inputs may keep landed cost lower now, but exposed SKUs could reset sharply in February. Separately, Canada extended its China paperboard-cups investigation; preliminary determinations are now due 30 December.[2]

ACTION

Map Canadian HS codes and remission eligibility now; obtain broker confirmation before DDP quotes and prepare alternate supply for paperboard lines losing relief.

PRICES + INPUTS

Paper rises while plastic softens

October U.S. producer prices rose 0.9% for paperboard and 0.3% for paper boxes and containers, while plastic packaging slipped 0.1%. Cascades also reported brown recycled-fiber input prices up 29% year over year.[3]

Action: keep 7-14-day paper quotes and indexed reopeners, but rebid plastic formats where resin-based suppliers should have more room.

CAPACITY + TECHNOLOGY

Digital and GCC capacity broadens

ePac opened a 66,000 sq. ft. digital flexible-packaging plant in Arizona; Dominion added a 188,000 sq. ft. folding-carton distribution hub. In Ras Al Khaimah, AJT signed for a further $50 million expansion in inks, eco paper bags and logistics.[4]

Practical move: benchmark short-run flex and East Coast carton quotes now; treat the RAK project as a confirmed plan, not operating capacity, until commissioning.

SOURCES & DATES

[1] Canada Finance, Nov. 9 [2] CBSA, Nov. 9

[3] U.S. BLS, Nov. 13; Packaging Dive, Nov. 11 [4] Packaging Dive, Nov. 13; Packaging MEA, Nov. 9

Confirmed: government remission and investigation dates, published producer-price data, announced U.S. openings and signed UAE expansion MOU. RAK output and resulting price relief remain forward-looking.

DHL, FedEx & UPS

Public surcharge tables | Week of Nov. 16-22

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

DHL

OFFICIAL TABLE

Last official row: 37.75% / 41.50%
Nov. 16 tracker: unchanged
MENA-Americas demand: $1.50/kg
Official U.S. page had not posted the new row.

No confirmed WoW change

Commercial impact
The demand fee is fuel-assessable and cumulative. A 20 kg shipment adds $30 before fuel and other accessorials.

DO NOW

Live-rate every lane; seek a written demand-fee concession.

FedEx

OFFICIAL TABLE

U.S. international: 42.50%
Domestic air: 32.00%
Ground: 30.00%
UAE international: 49.00%

Intl -2.25 pt; UAE -3.25

Commercial impact
Versus last week, each $1,000 of eligible charges saves $22.50 in U.S. international fuel and $32.50 in UAE international fuel.

DO NOW

Re-rate all open quotes; use the drop in carrier negotiations.

UPS

OFFICIAL TABLE

Table-derived Ground: 30.00%
Domestic air: 32.00%
Intl export/import: 43.50% / 45.75%
Nov. 16 history row still pending.

New tables effective Nov. 16

Commercial impact
Fuel eased, but Nov. 22 peak fees rise: additional handling to $11.90 and large package to $117.50; fuel applies.

DO NOW

Secure written peak-fee waivers and live-rate bulky parcels.

OCEAN: WCI -2% to $4,305; Shanghai-NY -3%.

AIR: MESA-USA +79% YoY; Saudi weight -33%.

Three priority actions

1. Re-rate every express quote
   FedEx eased sharply; compare total landed cost after demand and peak fees.
2. Map Canadian tariff exposure
   Confirm remission, HS codes and the February paperboard transition.
3. Protect GCC delivery promises
   Add air-capacity buffers; use Jeddah/Dammam or landbridge alternatives.

Watch next

- UPS peak fees Nov. 22
- FedEx peak fees Nov. 23
- CBSA decision Dec. 30
- RAK commissioning
- Paperboard inflation
- Hormuz traffic
- Riyadh air reliability

CARRIER & CUSTOMS SOURCES

DHL U.S. | FedEx U.S. | FedEx UAE | UPS U.S.; accessed Nov. 16
UPS surge fees, Nov. 12 | Drewry WCI, Nov. 12 | WorldACD, Nov. 15

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