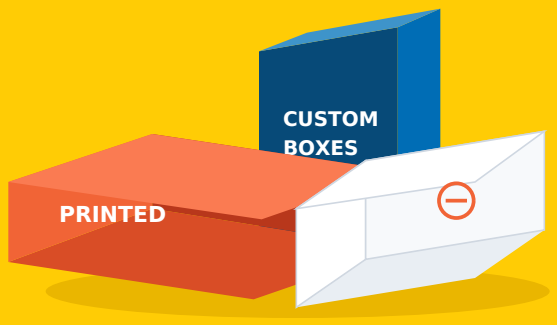
Packaging Market Pulse



GCC + NORTH AMERICA

Materials, freight and demand signals for custom printed packaging.

THIS WEEK AT A GLANCE

+1.36%
U.S. paperboard PPI, Sep. vs Aug.

€89/t
Sappi Europe board increase from Nov. 1

-33%
Saudi international air-cargo capacity

MATERIALS + PRICING

Board prices reset higher

What changed

September's provisional U.S. PPI rose about 1.36% MoM for paperboard excluding corrugated and 0.74% for corrugated shipping containers.[1] Sappi Europe announced a €89/tonne paperboard increase on new orders and deliveries from Nov. 1.[2]

Why it matters

Finished-box inflation is still catching up with board and energy costs. Imported European FBB/SBS alternatives can also become more expensive for GCC converters, strengthening suppliers' pass-through arguments.

ACTION

Keep quotations valid 7-14 days. Ask suppliers to separate board, energy and freight increases, and pre-buy only confirmed November jobs.

AIR CARGO + RELIABILITY

Riyadh shutdown cuts capacity

After repeated attacks, Riyadh cargo operations were suspended; Saudi international air-cargo capacity fell about 33% over 72 hours and Riyadh widebody/freighter capacity fell 99%.[3] Restrictions remained after the initial shutdown, while FedEx's direct CDG-RUH flight pause continued.[4]

Action: route urgent KSA cargo via JED/DMM; add 2-3 days.

TRADE CASE

Canada advances cup duties

Canada's trade tribunal found a reasonable indication that dumped and subsidized Chinese paperboard cups and containers injured domestic producers. CBSA preliminary determinations are due Nov. 16.[5]

Practical move: treat Chinese foodservice packaging quotes to Canada as duty-contingent. Offer locally converted alternatives and avoid fixed DDP promises.

SOURCES & DATES

[1] BLS PPI, Oct. 15 [2] Sappi, Oct. 13

[3] The Loadstar, Oct. 13 [4] FedEx service notice [5] CITT, Oct. 16

Confirmed: published producer-price indices, Sappi increase, Canadian tribunal decision and Saudi cargo suspension. Airport normalization remains fluid; obtain lane-level confirmation before promising delivery.

DHL, FedEx & UPS

Public surcharge tables | Week of Oct. 19-25

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

DHL

OFFICIAL TABLE

U.S. Express export: 37.50%
U.S. Express import: 41.25%
Prior week: 37.00% / 40.75%
Origin/account rules can differ.

+0.50 pt WoW

Commercial impact
Adds $5 per $1,000 of eligible charges. Fuel also applies to demand, remote-area and non-standard handling fees.

DO NOW

Re-rate open quotes; request discounts on fuel-assessable accessorials.

FedEx

OFFICIAL TABLE

U.S. international: 44.50%
Domestic air: 32.00%
Ground: 28.75%
UAE international: 51.75%

Air -0.25 pt; intl flat

Commercial impact
International and Ground are unchanged. Domestic air saves $2.50 per $1,000 eligible charges, but Saudi transit is less predictable.

DO NOW

Keep fuel assumptions; add KSA routing and delay contingencies.

UPS

OFFICIAL TABLE

Canada domestic Standard: 52.50%
Canada to U.S. Standard: 23.25%
Canada international: 41.75%
U.S. Oct. 19 row: not yet exposed

Canada Standard -2.5 pt

Commercial impact
Domestic Canada saves C$25 per C$1,000 eligible charges. A new C$0.54 Canada-to-U.S. Standard surge fee starts Oct. 25.

DO NOW

Live-rate U.S. lanes; add the Canada-U.S. fee to Oct. 25 quotes.

OCEAN: Drewry WCI rose 3% to $4,485/40-ft.

KSA: RUH service remains restricted and lane-dependent.

Three priority actions

1. Protect board and carton margins
   Use 7-14-day validity; itemize board, energy and freight changes.
2. Reroute urgent Riyadh cargo
   Use JED/DMM where confirmed and add 2-3 contingency days.
3. Re-rate carrier lanes
   Apply DHL fuel and UPS Canada fees; live-rate UPS U.S. shipments.

Watch next

- RUH normal operations
- Canada ruling Nov. 16
- Sappi increase Nov. 1
- DHL fuel escalation
- UPS Canada surge fee
- IP EMEA sale talks

CARRIER & CUSTOMS SOURCES

DHL U.S. | FedEx U.S. | FedEx UAE | UPS Canada; accessed Oct. 19

UPS surge notice, Oct. 15 | No new broad DIM or remote-area rule was verified Oct. 13-19; Saudi transit remains disrupted.

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