The
PACKAGING PULSE

MARKET INSIGHTS | JUNE 2026

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FLEXIBLE PACKAGING

Status: Elevated Cost Pressure

- Resin, energy, and freight continue to be the primary drivers affecting stretch film, shrink film, poly-bags, and liners. Cost increases throughout the supply chain are supporting higher conversion costs across flexible packaging categories.
- Procurement teams should anticipate continued supplier pass-through activity through Q3, particularly on high-volume film applications. Organizations with contracted programs and specification discipline remain best positioned to manage near-term pricing pressure.

CORRUGATED

Status: Monitoring

- Recovered fiber costs and announced containerboard increases continue to create upward pricing pressure across the corrugated market. While supply remains available, mills are actively pursuing price realization heading into H2 of 2026.
- Capacity rationalization throughout 2025 has improved industry supply-demand balance, strengthening mills' ability to implement announced increases.
- Procurement teams should monitor pass-through activity closely as corrugators evaluate pricing actions in the coming months.

OCEAN FREIGHT

Status: Elevated Pressure

- Trans-Pacific rates continue trending higher as carriers manage capacity through blank sailing and network adjustments ahead of peak season. Market conditions remain supportive of elevated pricing through Q3.
- Rising ocean transportation costs are increasing landed-cost pressure across imported packaging, raw materials, and manufactured goods. Organizations with global supply chains should continue monitoring freight exposure as transportation remains a key cost driver.

DOMESTIC FREIGHT

Status: Stable

- Truckload capacity remains balanced and transportation markets continue to operate with predictable service levels across most major lanes. Current market conditions do not indicate significant near-term disruption.
- Diesel and labor costs remain important watch items, but transportation fundamentals remain considerably more stable than international freight markets. Most organizations should continue to experience relatively consistent freight performance through Q3.

STRATEGIC ADVISORY

Common Themes Across Multi-Site Organizations

- Limited visibility into total packaging spend across locations
- Decentralized purchasing driving inconsistent pricing
- Supplier fragmentation diluting purchasing leverage
- SKU proliferation increasing inventory complexity
- Growing interest in category-management approaches

What Procurement Teams Should Watch

- Q3 flexible packaging pass-through activity (resin, diesel, energy costs)
- Containerboard increase realization and customer pass-throughs
- Ocean freight peak-season trajectory
- Transportation cost volatility and fuel trends
- Contract compliance and supplier adherence

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What's on your radar? → Packaging Intelligence Assessment