

Taiga to buy former Essity mills via Evokom stake

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Russian forestry holding Taiga Group has reached an agreement to acquire a stake in tissue paper and products company Evokom. Taiga plans to merge Evokom's business with its recently acquired subsidiary Syktyvkar Tissue Group (STG) to realize synergies in operations and supply chains.

Tigran Saakyan, managing director of Taiga Group, said that one of the group's strategic goals was to expand its presence in high-growth segments of the pulp and paper industry, such as sanitary and hygiene products. After the merger, the group would further fine-tune its product portfolio and strengthen activities in neighbouring markets.

Evokom originates in Essity's former Russian subsidiary that the Swedish company divested in 2023. Evokom operates three plants with a reported capacity of 140,000 tpy and offers a wide range of sanitary, household and personal hygiene paper products on the Russian market. Essity's brands have already been rebranded by Evokom with full transition expected to be completed in 2026.

Taiga group, which previously operated as Sezar Invest, is a new vertically integrated forest products company in Russia. It was formed through acquisition of different companies, including Mondi's former subsidiary JSC Syktyvkar, and Karelia Pulp, the managing company of Kondopoga Pulp and Paper Mill, among others.

Russian financial newspaper Kommersant reports that Taiga Group's stake could reach at least 50 per cent in Evokom.

Essity invests €10m in Austrian paper mill

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Swedish sanitary paper producer Essity is investing a total of around €10m in its paper mill in Ortmann, Austria, in 2025 in order to increase production reliability, improve product quality and increase energy efficiency of the plant. The projects include installation of a new screw press to treat of fibre sludge, another focus is on energy infrastructure where the company plans to renew turbines. Essity has earmarked €5.4m for the purpose. One third of the project will be implemented in the current year, the rest will follow in the first half of 2026.

Essity employs around 36,000 people worldwide including around 560 in Austria. The paper mill in Ortmann produces around 125,000 tpy of sanitary paper on two PMs.

EUDR: EU Council wants one-year postponement for all companies

Negotiations between EU Council and Parliament slated to begin soon

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The member states of the European Union have reached a common position in the ongoing debate surrounding further simplifications to the EU Deforestation Regulation (EUDR). According to a Council press release dated 19 November, the member states support the Commission's proposal for a targeted simplification of the due diligence process. However, the Council is pushing for a uniform one-year postponement of the application of the Regulation for all economic operators, until 30 December 2026, with an extra six months for micro and small enterprises. Previously, governments and stakeholders had expressed concerns about the readiness of companies and administrative bodies as well as technical issues relating to the new EU Traces system.

The Commission's plans to simplify the legislation, which were presented on 21 October, still foresee the same application date of 30 December 2025 for the EUDR, but would allow a six-month grace period for all companies and a one-year postponement until 30 December 2026 for micro and small enterprises.

The Commission's plans were met with criticism from the governments of Austria, Poland, Czechia and Latvia, among others. The German government had also recently submitted its own official proposal for an amendment of the EUDR to the European Commission, a spokeswoman of the Federal Ministry of Food and Agriculture confirmed to EUWID. Among other things, the German proposal included a postponement of the application date until the end of 2026. In a statement, German federal agriculture minister Alois Rainer welcomed the agreement in the EU Council: "I am pleased that the member states have now agreed on a common position based on our German proposal." He added that the Council is sending a "clear signal" in favour of a "practicable, lean EUDR" that will effectively protect forests but not create any excess regulatory burden for countries that do not have deforestation problems.

This is now also reflected in the position of the member states: According to the Council, only the operators who first place a product on the market would be obliged to submit the required due diligence statement. Downstream operators would no longer need to submit separate due diligence statements, but the first downstream operators "must keep and pass on the reference number of the initial statement," the Council wrote in its statement. Micro and small enterprises would only be required to submit a one-off simplified declaration.

In general, the Council wants the start of application to be postponed yet again for one year for all companies.

According to the statement, the Council has tasked the European Commission with carrying out, by 30 April 2026, a simplification review assessing the EUDR's impact and administrative burden on operators, particularly small and micro operators. The Commission had not yet reacted to this position by the EUWID editorial deadline.

The EU Council's common position does not include a "zero-risk" category in the country benchmarking system, an idea which had been promoted by several stakeholders, including the EPP group in the European Parliament and the German government.

Negotiations with EU Parliament expected to start in the coming weeks

According to the statement, the Council will now begin negotiations with the EU Parliament on the basis of this mandate "in the coming weeks and before the current EUDR becomes applicable as of 30 December 2025." In mid-November, the EU Parliament cleared the way for an urgency procedure to vote on the amendment plans for the EUDR. According to the latest planning, members of the European Parliament are slated to vote on the Commission's plans in the session week of 24-27 November.

Italian corrugated case material prices experience small dips in November

Surplus supply and slack demand shape the market ahead of year-end talks

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The Italian paper and board market remains subdued in November, with the vast majority of segments skipping a year-end rush. Preparations for price talks at the year’s end are also proceeding uneventfully in most cases. Insiders view this as proof that market players have a firm grasp of the markets and can realistically assess their positions.

EUWID Price Watch Italy			
November 2025			
Prices in € per tonne free delivered unless otherwise stated	November 2025	October 2025	November 2024
Fine paper			
Woodfree coated			
Copy paper 80 g, 40 g, 40 g	800 - 970	800 - 970	1,020 - 1,100
Copy paper 80 g, 40 g, 40 g	790 - 870	790 - 870	940 - 1,020
Offset news 80 g	800 - 900	800 - 900	1,020 - 1,100
Offset news 80 g	790 - 870	790 - 870	920 - 1,000
Woodfree coated			
News, double coated, 100 g	800 - 1,000	800 - 1,000	1,020 - 1,100
Recycled, double coated, 100 g	800 - 910	800 - 910	930 - 1,000
Publication paper			
Standard uncoated 40 g	570 - 600	570 - 600	600 - 625
Standard uncoated 60 g	580 - 610	580 - 610	610 - 645
Improved uncoated 100-160, 50 g	600 - 620	600 - 620	620 - 655
UV offset 80 g	720 - 760	720 - 760	750 - 800
UV offset 100 g	620 - 650	620 - 650	650 - 690
UV offset 120 g	620 - 660	620 - 660	650 - 700
Corrugated case material			
Unbleached kraftliner 170 g, European quality	620 - 630	620 - 630	630 - 640
White top kraftliner 180 g, European quality	780 - 820	780 - 820	800 - 830
Recycled European case material			
Recycled Europe, European quality	840 - 870	840 - 870	860 - 890
Trucklin 8, European quality	880 - 910	880 - 910	900 - 930
Trucklin 8, European quality	890 - 920	890 - 920	910 - 940
White top trucklin, grade C, 140 g, European quality	900 - 930	900 - 930	920 - 950
Trucklin 8, white quality	910 - 940	910 - 940	930 - 960
Trucklin 8, white quality	910 - 940	910 - 940	930 - 960
Cartonboard			
GD 8	580 - 610	580 - 610	600 - 630
GD 10	590 - 620	590 - 620	610 - 640
GD 12	600 - 630	600 - 630	620 - 650
GD 14	610 - 640	610 - 640	630 - 660
GD 16	620 - 650	620 - 650	640 - 670
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Except for corrugated case material prices, November saw little change in prices in Italy. Nonetheless, downward pressure on prices remains widespread. Manufacturers want to prevent this pressure from translating into additional price cuts, so they are making greater efforts to keep prices stable. Most markets, however, remain buyer’s markets, shaped by surplus supply and slack demand. As a result, suppliers lack the arguments to achieve their goals across the board. All the more surprising was one manufacturer’s demand at the start of November for higher prices for all coated magazine paper deliveries from January onwards.

Fine paper market remains a buyer’s market

Sources reported two contrasting trends when it came to Italian fine paper prices in November. On the one hand, paper mills have reportedly left their list prices untouched at October’s level after official price cuts for fourth-quarter deliveries. On the other hand, market players are reporting that prices can be renegotiated for every order. In these negotiations, where buyers mostly hold the upper hand, suppliers are mainly focusing on securing orders, which generally results in them making concessions to customers and lowering their prices.

Cheap imports from Asia and South America are underpinning this trend towards lower prices in Italy. Additionally, European suppliers’ thin order books are playing their part. European paper mills are generally not very busy, and paper producers have few means at their disposal to increase capacity utilisation. A few uncoated woodfree paper mills are trying to leverage their cost advantages to offer rock-bottom prices in Italy that can easily rival those charged by Asian competitors.

Wholesalers in Italy are also playing a role in driving prices. Shortly before the year's end, some merchants are striving to fulfil volume commitments with their suppliers but need first to clear space in their warehouses before ordering additional volumes. As a result, they are driving sales with the full extent of the discounts offered by paper mills for fourth-quarter deliveries being passed straight on to customers.

Printers, converters and wholesalers rarely had anything positive to say about their order volumes or the trend in demand for fine paper in Italy in November. Wholesalers were mostly complaining of weak business, not least influenced by quiet indent business. A few printers said that they were a little busier than in October. Others qualified this observation by explaining that orders were missing in October and were simply concentrated in a span of a few weeks towards the end of the fourth quarter.

Notwithstanding this fact, some paper suppliers anticipate that the price and demand situation on the woodfree coated and uncoated paper market in Italy might stabilise again a little at the beginning of next year at the latest. On the one hand, there was a great deal of uncertainty about the implementation of the EU Deforestation Regulation (EUDR), and customer unease was undermining importers' positions, one European paper producer said. On the other hand, preparations for Chinese New Year festivities are expected to slow business with China and drive up freight rates in January. One importer said that the latter would directly affect prices for paper made in China, as well.

Higher hardwood pulp prices in Europe might also play their part. While the increase in prices has not been substantial to date, a few insiders note that cost pressure on paper mills has intensified, which might actively push suppliers to either resist deeper price cuts or scale back supply.

Publication paper suppliers and buyers jostling for negotiating position

Paper manufacturers and their customers are gearing up for the next round of price talks about deliveries from January onwards, after several price cuts for publication paper took hold in Italy this year. As a general rule, suppliers and buyers will discuss quarter-long contracts, with monthly prices set for certain projects, usually at the customers' request. There is only sporadic interest in contracts lasting longer than a quarter, such as six-month arrangements. Where such interest does exist, it tends to come from the supplier side. Discussions had been limited to date, though. Market players told EUWID that the first conversations are scheduled for the end of November and start of December.

The stance adopted by paper producers can be explained clearly and quickly: price reductions instituted in the third and fourth quarters had narrowed the gap between prices and costs, and the ongoing decline in volumes, which for months has prevented machines from running at satisfactory capacity utilisation, has further intensified cost pressure and reduced profitability. From paper mills' perspective, this leaves no room for additional mark-downs from January onwards. Manufacturers thus aim to keep prices steady at current levels. As one paper producer noted, stable prices were the only way to ensure reliable deliveries.

Paper buyers are taking a different approach, each one seeking to secure the best possible starting position going into talks and the new financial year. Many buyers essentially have little objection to keeping prices the same, but only where prices are already low. As one publishing house buyer stressed, significant disparities in pricing between suppliers were unacceptable, and prices would at least converge towards the lower end of the existing spectrum.

That being said, a few customers also think that there is a chance of additional price cuts for first-quarter deliveries. They note that paper mills are operating at weak capacity utilisation and assume that some suppliers will make compromises to land additional volumes, as has happened so often in the past. Paper buyers are underscoring the problematic situation they face, with persistently high costs and dwindling order volumes. Additionally, publishers are facing declining advertising revenues. Quite a few buyers are thus keen to press for additional reduction in paper costs. Compared with other graphic paper grades, publication paper prices have seen more modest price cuts over the past one year, customers said, adding that the market continues to experience huge amounts of surplus capacity.

The battle for position in the publication paper market is taking place against a backdrop of reports highlighting the challenging situation facing publication paper producers in Europe. Unconfirmed reports indicate that one minor newsprint manufacturer had halted paper production in November. It is unclear when production will resume. Rumours are rife of additional paper machine closures affecting both newsprint and coated and uncoated magazine paper grades in Europe.

If these closure plans actually materialise, even in part, the market climate might shift to favour paper producers. One supplier stated that the position of European paper mills could also improve if the anticipated surge in Canadian imports this year does not result as significant as initially expected, due to temporary downtime at Canadian mills.

Small mark-downs for corrugated case material in November

The slight drop in prices on Italy's recycled corrugated case material market caught many insiders by surprise in November. Although it looked as if prices would remain stable by early November, prices ultimately slipped by €10/t, in some instances also by €15/t. These price cuts primarily affected brown grades, with only sporadic adjustments to prices for white grades.

Sources told EUWID that not all recycled corrugated case material suppliers were equally involved in November's price cuts. A few paper producers were reportedly unwilling to go below certain price levels and chose to forgo volumes instead. This is true for both domestic and foreign suppliers, who were unable to track every movement in prices because of higher logistics costs. The situation was further marked by reports of more mills taking temporary stoppages in November.

The price cuts instituted for kraftliner in the penultimate month of 2025 affected brown grades more than white grades. Market players also mentioned a tendency towards narrowing price differences and a more uniform level of prices, which meant that high prices were generally lowered.

Low-priced imports remained the key factor in pricing on Italy's brown kraftliner market. Despite wide-ranging capacity closures, US kraftliner is still readily available in Italy, with US suppliers continuing to set the tone for heavy-weight kraftliner with prices of around \$580/t CIF. Imports from Brazil play an important role when it comes to lighter-weight kraftliner, with one supplier confident that Brazilian suppliers will be able to strengthen their position going forward.

Market players have differing opinions about who is to blame for the latest reduction in Italian corrugated case material prices. Integrated corrugated board and packaging manufacturers chiefly pointed the finger at paper mills, which were reportedly operating at poor to moderate capacity utilisation and looking for business, making them willing to compromise further on prices. A few paper industry representatives are baffled by such comments, stating that it was packaging manufacturers themselves who were putting pressure on prices and asking for a discount on every order. One paper manufacturer told EUWID that major packaging manufacturers were having a particularly hard time with weak end-user demand and trying to offset the negative financial effects of lower volumes by lowering costs.

In the penultimate week of November, market players active in the Italian corrugated case material business shifted their attention more towards December. Demand had been weaker than expected in October and November, and nobody anticipated an uptick in the final month of the year. As a result, companies are focusing on measures to manage supply. Both paper manufacturers and converters are planning to take lengthy downtime between the final week of Advent and the first week in January to prevent stockpiling between Christmas and New Year.

In terms of December prices, EUWID sources on both sides of the market generally believe that prices will stay the same. However, any further decline in recovered paper prices in late November or early December might generate additional discussion in talks between recycled paper producers and their customers, one paper producer pointed out.

Italy's cartonboard market fails to show positive trends in November

November has brought few changes to the situation on the market for fresh fibre-based cartonboard in Italy. The market continued as a buyer's market, with plentiful supply and falling prices. This was especially true for the GC board segment, which remains hotly contested. Along with increased production capacity in Europe, imports from Asia were well known to be playing a significant role. Furthermore, a few European suppliers are finding that US business is suffering because of the flat-rate import tariffs imposed by the Trump Administration, leaving them with more cartonboard available that they are now trying to sell to customers in Europe.

In light of this situation, GC board manufacturers are feeling the downturn in consumption more than ever, with the behaviour shown by a few suppliers all the more aggressive, sources said. One EUWID contact described the market as a battleground, with major suppliers seeking to "knock smaller manufacturers out of the market." Another insider placed just as much blame on smaller suppliers because they, too, despite their "weak financial resources" and severe cost pressure, were lowering prices to win orders, thereby fuelling cut-throat competition.

In this environment, the pressure on GC board prices remains consistently high. After price cuts in the third and fourth quarters, a few EUWID sources are not ruling out additional decreases for deliveries from January or February onwards. As so often, things will depend on the outcome of price talks between the cartonboard industry and its big customers, such as brand manufacturers, insiders noted.

Market players noted that the recycled board market remains subdued and in line with previous months. Capacity closures in Europe over the past one and a half years, followed by the recent indefinite production stoppage by an Italian GD board manufacturer, had reduced available supply, although unfortunately not enough to stave off further declines in prices in the fourth quarter.

European manufacturers are said to have recently attempted to influence the market by temporarily idling machines, albeit with limited success. These “market-related production stoppages” were rarely deliberate actions, but rather a necessity and due to poor order books, one customer said with confidence.

European manufacturers are said to be partly to blame for the downward slide in prices in Italy, as are importers of GD board from south-eastern Europe, India and Asia. According to a few market players, the major issue for the Italian recycled cartonboard market lies in imports being freely and abundantly available. While European manufacturers have to scale back their capacity because of poor order books and cost pressure, new board mills are being built elsewhere, which can offer their volumes in Italy at spot prices, insiders added. Market players are currently quoting prices below €550/t free delivered for this material in Italy.

Negotiations are just around the corner for recycled board deliveries from January onwards, as well. GD board suppliers and converters are seeing no signs of swift changes to the current economic climate in Italy and Europe more broadly. Instead, they think that prices will remain under pressure as the new year dawns.

Italy: paper and board production

January - September 2025

tonnes	September			January - September		
	2025	2024	%	2025	2024	%
Total graphic paper	105,924	101,514	+ 4.3	849,430	976,929	-13.1
Uncoated ¹⁾	26,328	34,625	- 24.0	201,044	325,710	- 38.3
Coated	79,596	66,889	+ 19.0	648,386	651,219	- 0.4
Sanitary and household paper	139,649	135,033	+ 3.4	1,211,688	1,242,048	- 2.4
Total packaging paper/board	419,430	436,462	- 3.9	3,591,431	3,593,959	- 0.1
Corrugated case material	234,509	255,243	- 8.1	2,028,290	2,044,272	- 0.8
Other packaging paper	46,651	48,168	- 3.1	403,962	421,643	- 4.2
Other packaging board ²⁾	138,270	133,052	+ 3.9	1,159,179	1,128,044	+ 2.8
Other paper/board	31,613	30,103	+ 5.0	263,615	267,144	- 1.3
Total paper and board	696,615	703,113	- 0.9	5,916,164	6,080,080	- 2.7

¹⁾ including newsprint²⁾ including cartonboard and greyboard

Source: Assocarta

Recovered paper prices in Italy decline again

Buyers have the upper hand in a market with weak demand

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November was a weak month on the Italian recovered paper market, with subdued domestic demand from all customer segments. This was certainly true for all packaging-relevant markets, but also the graphic paper industry and even the tissue industry, which is now in crisis, as well. As customers required less recovered paper and supply grew in November, prices for all of the recovered paper grades tracked by EUWID declined in Italy.

EUWID Price Watch Recovered Paper Italy				
November 2025				
Prices in € per tonne	Nov 2025	Oct 2025	Sep 2025	Nov 2024
Mixed paper and board (1.02)	70 - 85	80 - 95	85 - 100	80 - 95
Supermarket corrugated paper and board (1.04)	75 - 90	85 - 100	90 - 100	85 - 100
Old corrugated containers (1.05)	85 - 95	95 - 105	95 - 110	95 - 110
New shavings of corrugated board (4.01)	100 - 115	110 - 120	110 - 125	120 - 135
Magazines (3.06)	115 - 135	125 - 140	130 - 140	165 - 180
Newspapers (2.01)	160 - 175	165 - 180	165 - 185	170 - 185
White woodfree letters (3.05)	300 - 310	310 - 320	310 - 330	300 - 320
White newsprint (3.14)	295 - 320	300 - 330	300 - 335	310 - 330
White woodfree shavings (3.18)	410 - 440	420 - 450	425 - 455	430 - 450
Prices ex works, material sorted and in bales				
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The export business, which is used as an outlet for excess domestic volumes, lent some support to prices of the ordinary grades. Nevertheless, there was another round of reductions on the Italian market. In November, quotes for mixed paper and board (1.02), supermarket paper and board (1.04) and old corrugated containers (OCC, 1.05) shed up to €10/t, according to market participants. The downward trend for these grades thus continues – after an initially steep drop starting in April, there has been a slow but steady decline since June.

The persistently weak demand for ordinary recovered paper grades in Italy and across Europe is having an impact. Consumer spending remains tepid and ordering remains weak in the packaging segment. Producers of recycled corrugated case material, cartonboard and coreboard in Italy continue using temporary downtime to adjust supply to demand, and did so again in November. Moreover, the year-end holidays are approaching and this is traditionally a time when many mills in Italy's paper industry take downtimes. In some cases, the effects were already being seen in November. In light of the downtimes scheduled to start in late December, buyers had little interest in holding excess recovered paper in stock. Owing to the poor order intake and upcoming holiday shutdowns, producers of paper and board did not have much need for ordinary recovered paper grades. Overall, demand was said to have softened. Buyers say there is more than enough recovered paper available in the market and sourcing is not a problem.

At the same time, waste management companies are not complaining about full yards and say that material is moving well, not least because collection volumes are low. Demand on the domestic market may have subsided somewhat but it has not collapsed, they say. Moreover, suppliers active on the export market often pointed out that exports to Asia were still quite good. However, softening prices on the Far East export market have given buyers in Italy a negotiating argument.

Falling prices on Far East export market

In November, exports for grade 1.05 from Italy to Asia were around €10/t cheaper than in October. Market participants mostly quoted prices of €100/t ex works for OCC on the Far East export market, or occasionally slightly more. The price trend was related to China's recent tightening of import rules for dry-processed recycled pulp. Citing quality concerns, the Chinese government introduced new rules in October and started conducting inspections, which led to bottlenecks at the ports and prompted important suppliers to temporarily pause their shipments of recycled pulp. Consequently, demand for recovered paper declined and prices fell.

The effect on Italy was largely indirect. Suppliers reported that their delivery volumes to Asia in November were still relatively stable or only slightly reduced. India was often mentioned as a destination country. Some sellers do not expect any major changes in the export business in December, while others do not rule out the possibility that demand could taper off somewhat. Another slight downward price step might also be possible, they predict. Most respondents believe that the problems relating to the regulatory changes in China will be only temporary.

For the Italian market, many players predict further smallish mark-downs for ordinary recovered paper grades in December, especially if export prices fall further. Several customers in Italy told EUWID that they would purchase less recovered paper next month. Over the Christmas and New Year's holidays, paper and board mills are planning their usual downtimes and it is expected that a few of these stoppages might be extended.

Very weak market for deinking grades

Finding customers for deinking grades seems to be increasingly difficult. Suppliers in Italy complain about very weak demand, which has been the status quo for some time but now appears to be worsening. Buyers are reducing their purchasing volumes and the supply is growing, the market survey found. As a result, prices slipped again modestly during November. According to market participants, magazines (1.06) saw mark-downs of €5-10/t, while quotes for newspapers (2.01) often decreased by €5/t compared with October.

There has also been waning interest in the higher grades of recovered paper recently. Some waste management companies report that customers not only from the packaging segment but also from the tissue industry have lower demand. One supplier said that given their disappointing order books, producers of recycled tissue had called for price reductions and warned that production could be idled. A different respondent also pointed out that the low pulp prices are making substitution of recovered paper with pulp more attractive.

Against this backdrop, Italian prices for white woodfree letters (3.05), white newsprint (3.14) and white woodfree shavings (3.18) mostly declined by around €10/t in November compared with October.

Order shortage in the German paper industry still significant

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One in three companies in Germany suffers from a lack of orders, according to the recent survey by the German Ifo Institute for Economic Research (Ifo). Along with the metal industry, the paper industry is particularly affected. Overall, the proportion of affected companies in Germany fell from 37.8 per cent in July to 36.9 per cent in October, Ifo Institute announced. However, the figure was still well above the long-term average.

The share of industrial companies lacking orders fell from 38 per cent in July to 35.5 per cent in October. At around 44 per cent, the situation in the paper and the metal industries remains particularly difficult, the institute observes. In the chemical industry, the share increased by five percentage points to 39.1 per cent. The automotive sector, on the other hand, can breathe a sigh of relief: after 38.7 per cent in July, order shortage affected only 29.5 per cent of the companies.

“The way out of the order slump is still long,” said Klaus Wohlrabe, head of Ifo Surveys. The shortage of orders at German companies may be caused by weak demand arising from the economic situation, but also by high costs.

German prices for woodfree paper and kraftliner unchanged in November

Plans for temporary downtime influence cores market

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On the market for woodfree paper in Germany, the dominant issues are excess capacities and the fierce competition in the printing, retail and paper industries. Print volumes continue to shrink and it is difficult to operate profitably. A potential price increase will not be possible without further capacity closures, insiders believe.

After minimal price concessions were granted for brown kraftliner in October, the pricing picture in November was broadly unchanged. The majority of insiders surveyed by EUWID in the middle of the month described prices as stable.

Stabilising prices for woodfree papers

Many players on the market for woodfree uncoated and coated paper in Germany say activity levels are good overall in November and they predict a strong start to December. Accordingly, EUWID respondents agreed that the business situation in the fourth quarter of the year was lively compared to the rest of 2025. However, a decently filled order book is not necessarily a sign of satisfaction, explain players from the paper and printing sectors. In general, the contract volumes are too small, competition is too fierce and margins are too narrow, they complain.

The paper and printing industry continues to feel the sting of the structural decline in the consumption of printing and writing paper. Experts fear that a few sales regions will see nearly double-digit percentage drops in delivery volumes for the full year 2025. Moreover, the industry must contend with other negative factors such as sluggish consumer spending, weak economic growth, high cost burdens faced by companies, and the cut-throat competition among paper mills, merchants and printing companies – especially in Germany.

Paper producers report that buyers continue to be price-oriented. Nevertheless, price movements have become significantly calmer recently. Price pressure and competitive pressure have already pushed prices to a “very low level,” EUWID was told. Since paper continues to be available on short notice in the fourth quarter, industry experts expect that printing companies will see no need to build up large paper inventories. Yet, it might be a different situation in the merchant business. In any case, temporary downtimes at paper mills are expected in December and January.

Against this backdrop, the price pressure in the fine paper market has not yet eased, say paper industry experts. There are

uncertainties relating to the outlook for the coming year and the next price round. Although paper industry representatives do not expect a slump in orders that would intensify price pressure, they also doubt that all producers will get sufficient orders. There will be no lasting shift in the current situation as long as there are no changes in the supply from Europe and overseas, they explain, adding that they expect capacity cuts to come. Moreover, observers expect an economic recovery to lead to at least a slight uptick in demand over the course of 2026. Players hope that some energy cost relief in Germany and Europe could strengthen the competitiveness of local paper mills.

Kraftliner prices remain unchanged

After slight price concessions were made for brown kraftliner in October, the situation on the price front was largely stable in November. The majority of industry insiders surveyed by EUWID at mid-month reported steady prices for both brown and white-top kraftliner.

On occasion, there were reports from the corrugated industry of downward steps of €10/t for brown kraftliner, but these cases represented a delayed implementation of the reductions reported in October. November prices for semi-chemical fluting also remained unchanged, according to the market survey.

On the whole, EUWID respondents from the converters' side say demand on the German market this month is too calm for this time of year. The situation in Eastern European countries such as Poland is better, they say. The hoped-for rebound towards the end of the year has not yet materialised in Germany. And market participants do not expect any fundamental changes in the demand situation during the remaining weeks in December. Consequently, there are reports from market insiders that inventories will be drawn down as much as possible in December to push call-offs into January.

Meanwhile, the annual talks are in full swing, according to market participants. Buyers of kraftliner told EUWID that they entered into the negotiations planning for 2026 volumes that are largely in line with this year's levels. At the moment, there are no signs of a substantial rebound in the market – and if this did occur, paper mills would have sufficient capacity for all kraftliner grades, market participants say.

Slightly better demand on German cores and coreboard market but no sustainable recovery in sight

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Cores producers contacted by EUWID report that demand in Germany has become somewhat brisker. But in light of the macroeconomic environment, companies take a realistic view, saying that the higher need for cores right now is related to the announcements by paper industry players that extensive downtime will be carried out over the Christmas holidays. This therefore does not represent a true uptick in demand, they explain.

Since the end of the summer holiday season and the third quarter, the market has not really rebounded and has been moving sideways ever since. Although the second half-year is generally somewhat weaker than the first half, it is usually not as bad as the current level. Prior-year volume figures are not always being reached or can only be achieved with great efforts to acquire new customers, EUWID was told. Nevertheless, coreboard producers remain disciplined when it comes to prices. There are scattered reports of special offers, but generally prices have remained steady.

There is no uniform trend when it comes to machine stoppages over the holiday season, which only ends on 6 January in some German states. Some cores producers are planning to idle their operations as usual, while others will continue production with reduced shifts throughout the year-end period. A few companies declined to share their forecasts for the coming year, saying it is "simply impossible to plan." The most common predictions were for a sideways trend from the current levels. The expectations of cores producers thus echo those across the paper packaging market as a whole, where almost all players anticipate neither growth nor declines in 2026.

In the current fourth quarter, prices for coreboard have been flat. Cores producers say they have not been going into the talks with lot sizes that are large enough to negotiate concessions. However, producers of coreboard are also playing it safe and have made no price demands in the fourth quarter. Spot volumes come up once in a while, but in general, the market is calm, EUWID was told.

Slack demand from Asia and Europe defining British recovered paper market in November

OCC prices take a tumble because of dry recycled pulp crisis in China

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Persistently slack demand from Asia, prompted by Chinese decision to inspect all import shipments of dry recycled pulp, lacklustre momentum in Europe and the weak pound Sterling set the tone for the British market in November. At the same time, arisings remain low, and there was no evidence of the usual seasonal uptick in collection volumes as of mid-November. This state of affairs is also reflected in the fact that paper producers with substantial retail contracts, which normally exit the spot market in November, were still active.

EUWID Price Watch Recovered Paper UK				
November 2025				
Prices in £ per tonne	Nov 2025	Nov 2025	Oct 2025	Nov 2024
£	€*	£	£	£
Mixed paper and board (1.02)	40 - 60	45 - 68	40 - 65	45 - 70
Mixed paper and board (1.02), export	50 - 57	57 - 64	50 - 58	40 - 65
Old corrugated containers (1.05)	78 - 88	88 - 99	85 - 99	75 - 95
Old corrugated containers (1.05), export	75 - 93	85 - 105	85 - 104	70 - 95
Magazines (1.06) [†]	90 - 120	102 - 136	90 - 122	95 - 160
Sorted graphic paper for deinking (1.11) [†]	80 - 95	90 - 107	80 - 95	95 - 115
Newspapers (2.01) [†]	95 - 110	107 - 124	95 - 112	105 - 140
Sorted office paper (2.05)	115 - 135	130 - 153	115 - 145	162 - 170
Multipurpose	135 - 160	153 - 181	135 - 160	165 - 180
White newsprint (3.14)	170 - 200	192 - 226	170 - 200	180 - 210
White woodfree uncoated shavings (3.18.01)	280 - 345	316 - 390	290 - 355	360 - 400
* Exchange rate as of 21 November 2025: £1 = €1.13				
[†] Includes exports and non-paper applications			Prices ex works, material sorted and in bales	
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Nonetheless, a few suppliers are having a hard time finding buyers. Paper consumers were still managing to push prices for almost all recovered paper grades lower again as a result.

OCC sales have been particularly hard hit by the inspection policy changes in China. Thousands of containers carrying dry recycled pulp are still sitting in Chinese ports awaiting clearance, experts said, adding that the first containers have now been released. What's more, new specifications for dry recycled pulp imports into China came into effect on 18 November (see separate article). Nevertheless, this backlog would certainly take until the year's end to clear completely.

Given the current backlog, no additional dry recycled pulp is being shipped to China at the moment, and there is no demand for recovered paper in other Asian countries that produce dry recycled pulp, either. In fact, buyers in Asia were still being sought for US material originally intended for dry recycled pulp production. This material was being offered for extremely low prices.

As a result, OCC prices fell during the month in the UK, too. Prices above £90/t could generally only be achieved at the start of the month and mostly only for shipments to Indonesia. In late November, most prices for domestic deliveries and exports to Asia were below £90. Insiders also quoted prices below £80 for deliveries to mainland Europe. Kraft-containing grades were also hard to sell, and prices dipped £10-15/t lower.

Mixed paper and board (1.02) prices were a little more stable. Asian export business had less of an influence in this segment, with demand in Europe also proving to be more robust. In a few instances, buyers have reportedly even raised their previously very low prices. All told, though, only small mark-downs emerged at the top end of the bracket.

More stability for woodfree grades – have prices hit rock bottom?

There also appears to be more stability for the woodfree grades used by tissue producers. While sorted office paper (2.05) prices still saw some downward adjustments at the upper end of the price range, the majority of prices remained unchanged compared with October at £120-135/t. This price is now low enough that some material is once again being diverted to Asia, further stabilising the lower end of the price range.

Multi grade prices have not altered in November. Market players told EUWID that one white packaging paper producer that held a stoppage for technical reasons in October was now running at good capacity utilisation to make up for this lost output. One tissue mill is said to have suffered a technical stoppage, and another a fire, but both events only caused short production disruptions.

Experts believe that prices for multi grade have now bottomed out, or at least are just a few pounds away from doing so. A few converters are reluctant to put too much pressure on prices, in order to limit the anticipated price increases for the grade. These hikes are forecast for the end of the first or early in the second quarter, when Continental European paper mills and graphic paper producers are expected to return more actively to the UK market for recycled woodfree paper grades.

Additionally, Essity's Prudhoe site is scheduled to launch operations at the Unifibres complex in December, with official commissioning set for February, according to a company spokesperson. Increased purchasing from this site is likely as a result.

Deinking grades see small price cuts, pulp substitutes continue to feel the pinch

Limited price cuts have been reported for sorted graphic paper for deinking (1.11), newspapers (2.01), and magazines (1.06), with the reductions often small enough that they did not alter the price bracket reported in last month's in the EUWID Price Watch. Demand for these recovered paper grades remains subdued, and paper manufacturers are themselves under significant pressure to minimise costs. One expert pointed out that paper production was scaled back whenever there was not enough recovered paper available at the "right price". At the same time, market players were aware that supply continues to shrink and the economic viability of sorting operations is becoming increasingly questionable for many suppliers.

Nevertheless, prices for these grades might be at or close to their lowest point since the availability of these grades is traditionally lower in January and February.

The market for pulp substitutes continues to experience a substantial supply. Experts believe this to be at least partly connected to what is happening to pulp prices, where suppliers have managed to institute little to no hikes. Additionally, key buyers for these grades are holding back, leaving a few suppliers stuck with unsold material.

PERN export licences still an area of concern

Market players do not expect to see any major changes on either the supply or demand fronts this year. Instead, attention is shifting to the dry recycled pulp situation in China and the granting of export licences.

Starting in 2026, all British exporters of packaging waste, including recovered paper and cartonboard, must be officially registered and accredited in order to be able to keep issuing PERNs (Packaging Export Recovery Notes). PERNs are tradable certificates serving as proof that British recycled materials have been reprocessed abroad. They are a crucial element of the EPR system for packaging in the UK. Even companies that do not want to take part in PERN trading are still required to register. Registration had to take place between 1 September and 1 October, it is learnt. Market players told EUWID that the process was slow, with application documents returned multiple times with requests for further information.

Paul Sanderson, CEO of the Recycling Association, told EUWID that not a single company had received accreditation at the time this issue went to press. "The situation is creating huge uncertainty for waste management companies because no one knows whether their applications will be accepted or rejected," Mr Sanderson remarked. In addition, logistics for shipments from January 2026 will soon need to be arranged, so businesses need assurances that they will be able to continue exporting.

If enough market players are not permitted to export, large volumes of material will build up in the UK – and that in a month when collections were at their peak and at a time when recovered paper was especially difficult to store.

UK recovered paper exports

tonnes	January - August		% Change
	2025	2024	
Total EU 27	572,054	581,116	- 1.6
France	100,060	102,066	- 2.0
Germany	165,144	192,067	- 14.0
Netherlands	198,758	195,239	+ 1.8
Total other Europe	224,439	282,967	- 20.7
Turkey	224,019	282,657	- 20.7
Total Asia	1,806,790	1,664,197	+ 8.6
China	859	1,650	- 47.9
India	894,795	567,624	+ 57.6
Indonesia	150,172	169,280	- 11.3
Malaysia	343,320	401,434	- 14.5
Thailand	156,926	126,874	+ 23.7
Vietnam	241,909	364,402	- 33.6
Total South America	120	104	+ 16.0
Total Africa	-	395	-
Total North America	48	17	+ 173.8
Total Australasia	510	731	- 30.2
Total Exports	2,603,961	2,529,526	+ 2.9

Source: CPI

Prices for printing and writing paper on the British market remain under pressure

Demand for cartonboard and corrugated case material picks up slightly

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Negotiations on prices for publication paper have also begun in the United Kingdom, with the starting point similar to that of three months ago: paper manufacturers could use an increase, but this is difficult to implement in the current market situation, and customers naturally want to pay less. Landmark agreements are expected in December. Like publication paper, the market for fine paper remains shaped by overcapacity and chronic price pressure. There were further price reductions for both, woodfree coated and uncoated paper grades in November.

EUWID PRICE WATCH UK				
November 2025				
Prices in £ per tonne free delivered unless otherwise stated	November 2025	November 2025	October 2025	November 2024
	£	4*	£	
Fine paper				
Woodfree uncoated				
Copy paper 80 g A4 grade	760 - 820	809 - 827	760 - 800	800 - 840
Copy paper 80 g A4 C-grade	720 - 760	804 - 805	720 - 800	800 - 830
Other news 80 g	800 - 840	905 - 912	800 - 800	800 - 870
Other news 80 g	740 - 800	806 - 804	740 - 810	800 - 900
Woodfree coated				
Sheet, double coated, 100 g	800 - 880	808 - 1.006	840 - 880	900 - 940
Book, double coated, 100 g	770 - 820	875 - 927	770 - 800	800 - 850
Publication paper				
Standard uncoated 40 g	480 - 510	542 - 576	480 - 510	480 - 510
Standard uncoated 40 g	480 - 520	554 - 588	480 - 520	480 - 520
Standard uncoated 40 g	500 - 520	545 - 589	500 - 520	500 - 520
Imperial uncoated 32 g, 50x68	530 - 540	589 - 610	530 - 540	530 - 540
LWC offset 80 g	480 - 485	746 - 742	480 - 485	480 - 520
LC offset 80 g, 30	580 - 605	615 - 634	580 - 605	600 - 640
Corrugated case material				
Fronts & flaps corrugated case material				
Uncoated kraftliner 100 g, European quality	800 - 740	790 - 842	800 - 740	800 - 750
White top kraftliner 100 g, European quality	800 - 875	910 - 989	800 - 875	800 - 845
Recycled fluting 100 g	530 - 575	599 - 609	530 - 575	540 - 585
Recycled fluting 80 g	530 - 580	599 - 607	530 - 580	540 - 600
Recycled fluting 80 g	540 - 580	600 - 607	540 - 580	575 - 610
Testliner B	530 - 580	622 - 671	530 - 580	540 - 605
Testliner B	530 - 575	599 - 609	530 - 575	540 - 585
White top testliner grade B, 140 g	640 - 700	722 - 791	640 - 700	670 - 720
Cartonboard				
OE1	670 - 680	644 - 746	670 - 680	650 - 720
OE 2	880 - 1.000	994 - 1.140	880 - 1.000	850 - 1.000

Demand for packaging in the British market remained below the usual level in November, although industry experts report a slight upturn. Nevertheless, capacity utilisation among manufacturers of corrugated sheets and packaging is reasonable, not least because large multinational packaging companies have realigned their customer strategy. The mood continues to be dampened by expectations surrounding the autumn budget, which will be presented unusually late this year, on 26 November. The government needs to close a significant budget gap. The measures announced last year were widely criticised by market participants as “anti-growth”. Many fear that the current budget will contain similar interventions.

Fine paper prices continue to be under pressure, price ranges remain wide

Prices for woodfree coated and uncoated paper in the UK remained under pressure in November, with further downward price adjustments. However, there are differing reports on the extent of the price declines in November, as well as on the prices at which purchases are being made.

Offset reels are being sold at prices of just over £700/t in some cases, according to insiders in the woodfree uncoated paper market. Spot offers are even lower. On the other hand, however, there is also paper that is still changing hands at prices above £900/t. Similarly divergent figures are given for folio sheets, where prices at the lower end are around £800/t, while paper is still being sold for around £950/t. White box A4 C-quality copy paper can be purchased for prices slightly above £700/t, with spot

transactions priced another £50/t lower, according to market players. At the other end of the scale, prices of around £800/t are being quoted and paid.

Prices for woodfree coated paper also remain widely scattered, with price differences of £100/t and more in some cases. Price pressure continues in this segment, as did some price reductions in November.

According to market sources, there are widely varying prices for the same paper from the same manufacturer, sometimes even for the same customer. This depends on the quantity, but also on any special requests in addition to the standard specifications.

The development of the British market is broadly in line with the European trend. So far, deliveries of uncoated and coated woodfree paper are significantly below last year's levels, with coated grades showing much sharper declines than uncoated grades.

Paper manufacturers, merchants and printers are all under pressure to deal with the situation of a steadily shrinking market. Not only is there overcapacity in paper production, but there is also more than enough printing capacity, and the UK printing industry is undergoing a constant process of concentration and consolidation. Over the past five years, the market volume of the printing industry in the United Kingdom has shrunk by approximately 5 per cent annually in pounds sterling, with the number of companies declining by a somewhat smaller percentage. In addition, there is similar competitive pressure in the paper merchants sector. The remaining merchants are competing for an ever-shrinking market volume.

Publication paper consumption continues to head lower in the UK

The foundations of publication paper consumption continue to be eroded in the UK. The circulation of daily and weekend newspapers, which are key for newsprint, was notably lower this October than in the same month last year. Among major daily newspapers, the average number of printed copies per issue saw a double-digit percentage drop. The freesheet Metro, which is still the UK's highest-circulation title with almost one million copies, also recorded a loss of nearly one per cent in its circulation. While free newspapers remain comparatively stable compared to paid-for titles, they too are experiencing a steady decline in circulation in the long term.

Although a number leading daily newspapers, including The Sun, The Times, Daily Telegraph, The Observer, and The Guardian, no longer publish circulation figures, the industry consensus is that these titles are following the same downward trend as their competitors. According to market monitor ABC, the leading tabloid, The Sun, had a print run of around 1.2 million copies in 2019. If its circulation has declined at a similar rate to its peers, as is widely assumed, the paper would now be printing about 550,000 copies. Back in 2000, its circulation was still around 3.5 million. Circulation peaked in the 1990s when it topped 4 million copies.

The picture is much the same for magazines, though there are variations by individual title. All of the UK's highest-circulating magazines have recorded declines in print circulation. According to ABC, The Economist's print run for 2024 stood at around 443,000, a drop of 10 per cent compared to the previous year. The slump has been slightly less pronounced among TV listings magazines, with leading titles TV Choice (894,000) and What's on TV (529,000) posting decreases of 3 per cent and 4 per cent, respectively. Lifestyle magazines have also seen high single-digit to double-digit declines in circulation.

These figures are consistent with comments made by market players active in the British newsprint business. Some describe the current trend in demand for newsprint as normal and as expected, while others see the UK's drop as relatively steep in a European comparison. On the supply side, production capacity is being withdrawn from the market at UPM Kaukas, Sappi Kirkniemi and, after the conclusion of negotiations, UPM Ettringen. Nevertheless, surplus capacity persists.

The starting point for price negotiations now beginning for Q1 2026 contracts is essentially unchanged from three months ago, apart from the LWC segment. Buyers are looking to cut their paper costs and are demanding price reductions, while paper producers are either unwilling or, in some cases, barely able to make further price concessions. As late November drew near, the outcome of these negotiations was still unclear. However, quite a few insiders speculated that prices might simply be rolled over from the fourth quarter into the first quarter of 2026. There are already reports of deals being struck at nearly unchanged prices.

Good workloads and stable prices shaping the British corrugated board market

The British markets for corrugated case material and corrugated packaging are displaying little to no growth in 2025, something that reflects the cautious economic mood and subdued consumer sentiment.

Even though market conditions remain challenging, many sheet and packaging manufacturers have been pretty pleased with business since the summer, even though it has not lived up to expectations in some cases. The modest upturn seen from September onwards has raised hopes that full-year targets might still be made or missed by only a narrow margin. However, a significant pre-Christmas boost like the one seen before the pandemic has surfaced only in isolated cases.

Market players are chiefly highlighting the strategic reorganisation undertaken by major multinational paper and packaging groups as the reason why machines are operating at good capacity utilisation. These companies are increasingly focusing on serving very large international customers (>500 million m²). In some cases, smaller converters were facing long lead times (up to the middle of January) or significant price hikes (up to 40 per cent), prompting them to seek new suppliers.

As a result, even smaller suppliers have also seen lead times for new customers or special grades, such as BC flutes, become a little longer, although periods reportedly do not exceed 10 days. The bulk of orders, especially those from regular customers, continued to be served at short notice.

Pressure on sheet and packaging prices has continued to ease, thanks to machines operating at good capacity utilisation and changing supply patterns. A few producers took the opportunity to improve or exit low-margin transactions. Others are adopting a wait-and-see approach in light of expected industry changes, especially Eren Paper's entry onto the market.

Eren Paper continues to buy up smaller British converters and is reportedly planning a new corrugated board line in Shotton. This is accelerating market consolidation, but, as one converter observed, it is also turning Eren Paper "from a potential supplier into a potential competitor."

Insiders anticipate that the launch of a state-of-the-art, highly cost-efficient machine during the year will spark additional consolidation among other suppliers, for instance, through the closure of paper production sites in the UK. "2026 will be a transformative year for the British corrugated board industry," one expert said, summing up market sentiment.

Even though converters are operating at better capacity utilisation rates, which was not due to a surge in demand, prices for all types of corrugated case material stayed the same in November. One reason for this is that the UK did not recently follow the price hikes instituted in mainland Europe in full, so subsequent price corrections were more modest. Spot lots or small discounts were reportedly still available in Continental Europe. No changes in prices are expected between now and the year's end.

Ongoing annual negotiations are mostly focusing on maintaining existing volumes and prices. Converters view the prospect of price reductions for recycled grades in December on the continent as a potential disruptor, as any change would only feed through to the UK market in January. Experts consider a modest decrease of up to £20/t for brown recycled grades possible. A few market players report significant pressure on kraftliner prices, noting that the gap between kraftliner and recycled grades was now too wide. Others describe the market for kraftliner as generally stable.

Most companies anticipate stable volumes or, at best, only marginal growth in the corrugated packaging business in 2026. The cost base remains high, despite the dramatic 90 per cent reduction in network charges for the 500 largest energy users, which came into effect in April. Converters have criticised the British government for once again favouring large, well-financed businesses instead of supporting smaller and medium-sized companies, which have faced higher insurance costs and rising minimum wages since April.

British cartonboard market seeing only a slight uptick in demand

The British folding box and cartonboard market also experienced an upturn after the summer, albeit a very subdued one. After all, a slight improvement in demand was evident throughout the market and, according to industry insiders, looks set to continue into January. In a few cases, some "latecomer" orders might be placed for Christmas business, although the season is by and large over and has not provided a noticeable boost.

At the same time, demand patterns that have been described as "erratic" continue to play out. Sources said that one week, business was brisk; the next it was subdued. A few cartonboard sellers and folding box manufacturers reported operating at low capacity utilisation in October but had had a good run so far in November. For others, it had been the other way around. Market players attribute this to lead times remaining short and cartonboard being abundantly available. Many customers were placing their orders at the last minute, something that generally posed no problems, aside from the occasional organisational hiccup. Surplus supply was also partly blamed on the US tariffs imposed by President Trump.

GD (white-lined chipboard) and GC (folding boxboard) prices continue to soften in this environment, although they have not collapsed entirely. Companies were securing very low prices not just for Asian cartonboard but also, increasingly, for spot lots from European suppliers. For example, the price floor for GC 2 dipped just below £900/t last month. GD 2 is mostly changing hands for between £580 and £620/t, though here too, the floor is slowly edging lower.

The substitution of GD with GC board continues, with Asian suppliers, in particular, reportedly gaining market share. The UK has traditionally been a market with a strong preference for GC, where low-grammage cartonboard with excellent converting and printing properties is in demand. The introduction of new, weight-based EPR fees is further driving this trend. According to reports, Chinese cartonboard is now even being used as a substitute for GD liner.

Negotiations on volumes and prices for 2026 are currently taking place. Agreed order quantities are expected to remain largely in line with 2025, even though the market is forecast to grow slightly next year. A few market players anticipate stable prices, while others are predicting reductions. Contract terms of three to six months are being reported.

The EU Deforestation Regulation (EUDR) is causing headaches for the British cartonboard and folding box industry, too. On the one hand, businesses needed to use cartonboard that complied with EUDR to continue delivering to the EU. On the other hand, many aspects of the regulation remained unclear. Nonetheless, major manufacturers in China and Indonesia had already made the first preparations as far as possible.

UK key market data						
August 2025						
in tonnes	August			January - August		
	2025	2024	%	2025	2024	%
Production						
Corrugated case materials	119,633	126,382	- 5.3	936,891	961,133	- 2.5
Recycled Fluting	56,327	60,914	- 7.5	458,322	474,102	- 3.3
Testliner	63,306	65,468	- 3.3	478,569	487,031	- 1.7
Parent reels of tissue	58,249	61,121	- 4.7	467,160	492,975	- 5.2
Other papers and boards, incl. printing and writing paper	89,212	93,348	- 4.4	732,999	776,291	- 5.6
Total paper and board	267,094	280,851	- 4.9	2,137,050	2,230,399	- 4.2
Apparent Consumption						
Packaging paper and board	n. a.	n. a.	n. a.	2,395,414	2,389,699	+ 0.2
Corrugated case materials	207,579	214,045	- 3.0	1,611,553	1,615,477	- 0.2
Kraftliner and SC Fluting	30,113	31,657	- 4.9	246,544	259,050	- 4.8
Recycled Fluting	72,946	75,431	- 3.3	562,639	576,910	- 2.5
Testliner	104,520	106,957	- 2.3	802,370	779,517	+ 2.9
Cartonboard and other board for packaging	n. a.	n. a.	n. a.	632,430	641,289	- 1.4
Packaging papers	n. a.	n. a.	n. a.	151,432	132,933	+ 13.9
Parent reels of tissue	93,061	93,774	- 0.8	742,051	763,210	- 2.8
Printings and writings	n. a.	n. a.	n. a.	806,825	925,301	- 12.8
Uncoated mechanical	n. a.	n. a.	n. a.	116,118	136,318	- 14.8

Uncoated woodfree	n. a.	n. a.	n. a.	325,252	390,055	- 16.6
Coated mechanical	n. a.	n. a.	n. a.	205,867	204,843	+ 0.5
Coated woodfree	n. a.	n. a.	n. a.	159,588	194,086	- 17.8
Other papers and boards	n. a.	n. a.	n. a.	394,791	404,413	- 2.4
Total paper and board	n. a.	n. a.	n. a.	4,339,081	4,482,624	- 3.2
Exports						
Corrugated case materials	10,950	11,098	- 1.3	85,992	100,415	- 14.4
Recycled Fluting	3,632	4,604	- 21.1	32,325	42,756	- 24.4
Testliner	7,318	6,494	+ 12.7	53,667	57,659	- 6.9
Other papers and boards, incl. printing and writing paper	42,698	46,868	- 8.9	395,806	397,541	- 0.4
Total paper and board	53,648	57,966	- 7.4	481,798	497,956	- 3.2
Imports						
Corrugated case materials	98,896	98,761	+ 0.1	760,654	754,759	+ 0.8
Kraftliner and SC Fluting	30,113	31,657	- 4.9	246,544	259,050	- 4.8
Recycled Fluting	20,251	19,121	+ 5.9	136,642	145,564	- 6.1
Testliner	48,532	47,983	+ 1.1	377,468	350,145	+ 7.8
Parent reels of tissue	34,812	32,653	+ 6.6	277,917	270,530	+ 2.7
Other papers and boards, incl. printing and writing paper	194,358	220,655	- 11.9	1,645,258	1,724,891	- 4.6
Total paper and board	328,066	352,069	- 6.8	2,683,829	2,750,180	- 2.4
Fibre						
Woodpulp mill usage						
Sulphate Bleached Softwood	24,905	25,888	- 3.8	188,876	214,568	- 12.0
Sulphate Bleached Hardwood	33,667	29,890	+ 12.6	252,911	241,364	+ 4.8
Other grades of woodpulp	19,222	17,896	+ 7.4	143,830	147,035	- 2.2
Woodpulp imports						
Sulphate Bleached Softwood	21,663	22,124	- 2.1	162,097	174,761	- 7.2
Sulphate Bleached Hardwood	39,340	36,839	+ 6.8	284,844	301,193	- 5.4
Other grades of woodpulp	1,786	2,136	- 16.4	20,998	17,173	+ 22.3
Recovered paper						
Mill usage	200,418	221,265	- 9.4	1,667,908	1,768,181	- 5.7
Collection	506,675	529,400	- 4.3	4,203,456	4,227,014	- 0.6

Source: CPI

Palm acquires 50 per cent stake in Power Packaging

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German Palm Group acquired 50 per cent of the shares in Power Packaging in Czechia. The plant, based in Nýrsko in western Czechia, specialises in the manufacture of complex corrugated board packaging.



Power Packaging's annual sales is approximately €4m.

With its stake in Power Packaging, Palm is specifically expanding its packaging division in the area of complex and customised corrugated board packaging, which involves a high proportion of manual work. The partnership enables Power Packaging's expertise to be combined with its existing sales and production network, Palm says.

According to a statement by the Palm Group, Power Packaging will continue to operate under its existing structure and with the same management team.

The Palm Group has recently expanded to include five corrugated board plants in Western Europe, which were previously owned by International Paper.

Ence commissions new fluff pulp line

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Spanish pulp and energy company Ence Energía y Celulosa has entered the fluff pulp market by commissioning a new production line for fluff pulp at its Navia pulp mill. The plant can produce up to 125,000 tpy. The mill previously had a production capacity of 685,000 tpy of bleached eucalyptus pulp. Ence says certification of the new pulp line is currently underway, and the first tests have been satisfactory.



Ence has entered the fluff pulp market

The new line will enable Ence to expand its range of speciality grades, which are intended to replace imported fluff pulp from the USA in future, the company says. The product is intended for the European market for absorbent hygiene products and is to offer a regional, more climate-friendly alternative.

Capital expenditure for the new line amounted to €35m. Ence expects specialty pulp, including the new fluff grade, to account for more than 62 per cent of its total sales in 2028. In the first nine months of the current year, the share was almost 30 per cent.

Containerboard producer Wizpaper in liquidation

 **EUWID +** 24 November 2025 | [Valeria Buß](#) |  ~ 2 min | [Published in issue 48/2025](#)

French recycled corrugated case material producer Wizpaper is being liquidated. The company had been placed in receivership only at the beginning of October. Now, on 18 November, the commercial court of Lille Métropole ordered the paper mill into liquidation, reported Henri Bréban, President of Wizpaper's parent company Be paper. Production is said to have already ceased.



Wizpaper fell victim to the crisis in the packaging paper market

Wizpaper most recently produced 130,000 tpy of recycled corrugated case material and employed 140 people, Mr Bréban told EUWID. According to previous information, the PM at the site has a maximum capacity of 180,000 tpy.

Mr Bréban took over the site from Sequana in 2018 and converted the fine paper machine to the production of recycled containerboard. The mill is part of the Be Paper group, which also includes the Express Découpe reel cutting centre and the packaging firm Express Packaging. According to Mr Bréban, these two sites are not affected by Wizpaper's problems. The businesses would continue to operate and the necessary paper would be purchased in the future, the managing director said.

Mr Bréban attributed the closure in particular to the current market weakness and overcapacity in the packaging paper market. The energy crisis had also hit the company hard, he added. In addition, recovered paper costs had been too high overall throughout the year. In this market environment, it was also not possible to find a buyer for Wizpaper, Mr Bréban said. At the beginning of October, this had still been stated as a goal.

Two new recycled corrugated case material mills have been opened in France in recent years. In 2023, the VPK Group launched its rebuilt mill in Alizay with a capacity of 450,000 tpy. In April this year, Norske Skog followed suit with its rebuilt machine in Golbey, which will be able to produce 550,000 tpy of recycled containerboard once fully ramped up.

Fapajal Papermaking orders new tissue line

21 November 2025 | 🕒 ~ 1 min | [Published in issue 48/2025](#)

Portuguese tissue manufacturer Fapajal Papermaking S.A. has ordered a complete tissue production line for its paper mill in São Julião do Tojal.



The new line will produce around 30,000 tpy of toilet and kitchen tissue and is scheduled to start up in the first half of 2027.

Andritz will supply the complete line including stock preparation equipment, a PrimeLine tissue machine with a speed of 1,800 m/min and a working width of 2.75 m, a PrimePress shoe press, a steel Yankee, and systems for automation, electrification and engineering.

Fapajal was founded in 1755 in São Julião do Tojal and produces both parent reels and tissue products for national and international markets. The company currently employs around 200 people.

China tightens specifications for dry-pulp imports

 **EUWID +** 20 November 2025 | [Frauke Schmidt](#) |  ~ 1 min | [Published in issue 48/2025](#)



China has introduced stringent specifications for imports of dry-manufactured, recovered-paper-based pulp (“dry pulp”) with effect from 18 November 2025. The new requirements are aligned with the national standard for recycled fibres

(GB/T 43393) and define a set of mandatory quality and safety parameters that every shipment must meet.

Under the new rules, the permissible content of extraneous materials in dry pulp is limited to a maximum of 0.5 per cent. Strict thresholds apply to heavy metals: lead and chromium (≤ 50 mg/kg) as well as mercury and cadmium (≤ 0.5 mg/kg). The total content of heavy metals may not exceed 100 mg/kg.

There are also specifications regarding the size of unfibrillated particles (10-20 mm: ≤ 18 per cent, 20-30 mm: ≤ 10 per cent, > 30 mm: not permitted) and various mechanical properties (tensile strength ≥ 22 N·m/g, burst index ≥ 1.0 kPa·m²/g, tear index ≥ 5.5 mN·m²/g).

Each shipment must be free of radioactive materials. Limits apply to both gamma and beta radiation.

According to industry insiders, laboratory testing for microbiological components as well as heavy metals is required before goods can be released.

Global recovered paper markets come under pressure

Since Chinese authorities started to apply 100 per cent inspections for dry pulp on 9 October, several European suppliers have reported prolonged testing and release procedures at Chinese ports, resulting in considerable congestion in the ports. The laboratory analyses are said to be the main cause of the lengthy clearance times.

Until recently, countries producing dry pulp for the Chinese market stopped accepting recovered paper destined for this purpose, and the material earmarked for dry-pulp production – primarily originating from the USA – was diverted to other Asian markets. This ultimately contributed to a decline in recovered paper prices in Europe as well.

Fripa starts construction of tissue machine in Miltenberg

31 October 2025 | [Noureddine Guimouza](#) | 🕒 ~ 1 min | [Published in issue 48/2025](#)

German hygiene paper manufacturer Fripa Papierfabrik Albert Friedrich KG has started construction work on its new paper machine (PM 8) at its Miltenberg site. The groundbreaking ceremony for the expansion project took place on 29 October.



Fripa has started the construction works for a new tissue machine in Miltenberg

To make room for the new production facilities, existing buildings will first be demolished. The new paper machine

hall will offer around 6,000 m² of floor space and be complemented by a parent-roll warehouse, a transport bridge for automatic reel handling.

The company had placed the order for the new tissue machine with Andritz in July 2025. Once completed, the new unit will have an annual production capacity of 37,000 tpy and a maximum production speed of 2,100 m/min.

Fripa did not disclose the exact investment amount but described it as being in the mid double-digit million-euro range. The investment aims to strengthen production capacity and secure the company's long-term competitiveness.

