

Bong reports price pressure amid overcapacity in 2025

 **EUWID +** 04 March 2026 |  ~ 2 min | [Published in issue 10/2026](#)

Amidst political and macroeconomic uncertainties, envelopes and mailing bags producer Bong is looking back on difficult market conditions. Growth in the EU was sluggish, with Germany in particular grappling with the effects of the longest recession in the country's history, Bong states in its 2025 annual report. In addition, there is the ongoing political focus on digitisation for the envelope market, such as mandatory e-invoicing and the trend towards digital advertising channels.

Against this backdrop, prices for the company's core products – envelopes and lightweight packaging – came under pressure from several directions, most notably persistent overcapacity in the European envelope market. Bong describes an ongoing struggle to defend order intake, sales volumes and margins, which left a negative impact on company's sales and earnings in 2025.

Envelope market continues to decline

In its largest business area by turnover, envelopes, Bong reports a further 8 per cent year-on-year decline in the European market with an average annual contraction of 5.8 per cent over the past decade, according to figures from the industry association FEPE. Despite this structural decline, the European envelope market still represents a mass market with a volume of around 32.5 billion items.

Nevertheless, the downward trend in this area is expected to continue in the next few years. Bong therefore plans to trim capacities and fixed costs. In addition, the company is shifting parts of the production area and staff to lightweight packaging. However, this does not necessarily mean plant closures, the company told EUWID.

Lightweight packaging market grows

Bong continues to focus on its transformation into a producer of lightweight packaging for e-commerce. The company's goal is to increase the share of sales in its Lightweight Packaging segment to around 50 per cent from currently 36 per cent.

In 2025, currency-adjusted sales in the Lightweight Packaging segment stood 9.6 per cent higher than in 2024. While this is better than the general market trend, it is below the strategic goal of achieving continuous double-digit growth in lightweight packaging as part of Bong's transformation, the company says.

Bong produces envelopes and packaging for e-commerce with a total of around 970 employees in 13 countries.

Bong results				
million SEK	October - December		January - December	
	2025	2024	2025	2024
Key figures				
Sales	467	495	1,809	1,914
Envelopes	284	312	1,134	1,270
Light Packaging	174	170	640	602
EBITDA	29	31	88	119
Operating result	12.7	13.6	15.9	43.4
Net result	6	3	-29	-13
Source: Bong				

DS Smith invests and restructures packaging activities in Slovenia

 **EUWID** + 04 March 2026 |  ~ 2 min | [Published in issue 10/2026](#)

The wave of restructuring in DS Smith's packaging business has also reached Slovenia. DS Smith Slovenija, the Slovenian subsidiary of the British paper and packaging group, operates three production sites in Logatec, Brestanica and Rakek making corrugated packaging and other paper- and board-based packaging solutions. In response to the ongoing difficult market situation, the British company wants to cease production in Brestanica and focus its production activity more in Logatec.

DS Smith is investing €16m to expand the Logatec site. The investment programme is already underway and should be completed by October of this year, according to the group. DS Smith says the investments are aimed at modernising the plant, automating processes and expanding production and storage capacities. According to DS Smith, the optimisation of workflows and a stronger focus on customer-facing activities will strengthen its ability to serve leading global brands and create long-term added value for customers, employees and shareholders. The company did not provide details about the specific measures when contacted by EUWID.

Apart from a few general statements, DS Smith also did not comment much on the closure of production activities in Brestanica. Following the cessation of production, the related sales, marketing and innovation activities, as well as other supportive functions, will continue to operate at the site, the company explained.

The two DS Smith sites in Logatec und Brestanica are integrated corrugated board and packaging facilities and each have their own corrugator. At its factory in Rakek, the company makes packaging solutions from solid board and laminated corrugated board.

DS Smith Slovenija has around 420 employees at the three sites, including 140 in Brestanica, according to media reports. The company did not want to comment on how many jobs would be affected by the closure of production activities in Brestanica or how many new jobs might be created by the expansion at Logatec.

Since the end of January 2025, DS Smith has been part of the US paper and packaging behemoth International Paper (IP). As part of the acquisition and merging of activities, IP and DS Smith launched an evaluation of their activities and have announced or already completed the closure of several production and converting sites in the USA and Europe, including five facilities in Germany.

Recently, IP announced that the combined group would be split into two independent, publicly listed companies. IP plans to spin off the packaging activities in Europe, the Middle East and Africa to create a new entity named EMEA Packaging, which is expected

to be listed on the London Stock Exchange and the New York Stock Exchange. The second, considerably larger business would consist of the combined North American activities of IP and DS Smith and would continue to operate under the name International Paper.

Diversified portfolio limits The Navigator Company's decline in earnings

 **EUWID+** 04 March 2026 |  ~ 1 min | [Published in issue 10/2026](#)

The Navigator Company (TNC) was unable to match its previous year's results in 2025, but limited the decline in profits through diversification. The company says that its long-standing portfolio restructuring has strengthened its resilience, citing the Tissue division as an example, which has increased its share of the company's business from 5 per cent to around a quarter within a decade through acquisitions and organic growth. The Packaging division accounted for around 4 per cent of the company's turnover last year. Further development opportunities are to be pursued in this segment, TNC announces.

Around 32 per cent of the company's Ebitda was generated by the Tissue and Packaging segments, reports TNC.

TNC says it sold more woodfree uncoated paper and gained market share in this area, despite a steadily declining demand for printing and writing paper. Its average capacity utilisation in this business area rose by 8 percentage points to 87 per cent. However, sales prices fell compared to the previous year, with TNC reporting a decline of around 9 per cent. Increased deliveries of commodity grades led to additional losses in profits, which were partially offset by higher average prices for premium products.

The pulp market also came under pressure, with prices falling even more sharply than in the market for woodfree uncoated paper. Prices bottomed out in August, after which they recovered.

TNC's tissue business developed positively in terms of volume and, with an increase in sales of around 5 per cent, recorded higher growth than the European market as a whole (+1.2 per cent), which is primarily due to the acquisition of Accrol's tissue business in the United Kingdom in mid-2024.

The packaging sector developed steadily throughout the year, reports TNC. Around 30 per cent of sales in this sector are now generated outside Europe.

The Navigator Company results				
million €	October - December		January - December	
	2025	2024	2025	2024
Key figures				
Sales	480.5	519.7	1,969.8	2,088.3
EBITDA	75.5	115.5	375.7	115.5
Operating result	33.7	62.2	207.7	378.9
Net result	26.3	45.5.	144.7	286.9
Deliveries, 1,000 t				
Market pulp			0.3 million t (-11%)	
Paper			1.3 million t (+6%)	
Tissue			0.2 million t (+5%)	
Source: The Navigator Company				

Irving Paper gets state aid in response to challenging market

 **EUWID +** 04 March 2026 |  ~ 1 min | [Published in issue 10/2026](#)

Canadian publication paper producer Irving Paper will receive government support to help cope with challenging market conditions. According to business development agency Opportunities New Brunswick (ONB), the company will receive up to CAD15m per year over three years. The support is part of a CAD54m fund that the government provides to companies in the province of New Brunswick as they modernise operations, improve productivity, strengthen long-term competitiveness and maintain jobs in New Brunswick.

ONB explains that the Irving Paper subsidy is intended to “support the global competitiveness of New Brunswick’s only remaining paper mill during a period of significant cost pressure and market volatility.” Maintaining operations will protect more than 183 jobs, the agency says.

This state aid comes after Irving Paper had to halve production at its Saint John mill last year due to high industrial electricity rates, which didn’t allow the mill to remain competitive. 50 per cent of operations were permanently shut down at the time, leading to around 140 job cuts.

Irving Paper’s Saint John mill produces SC paper for flyers and magazines with a capacity of 205,000 tpy.

ABB to modernise PM 5 at Billerud's Gävle mill

 **EUWID+** 04 March 2026 |  ~ 1 min | [Published in issue 10/2026](#)

ABB has signed an agreement with Swedish pulp and paper producer Billerud to modernise Paper Machine 5 at its Gävle mill. The project will upgrade automation, quality control and drive systems in order to strengthen operational stability, enhance cyber security and reduce energy and raw material consumption.

The Gävle site is one of Billerud's key production facilities for liquid packaging board and liner. According to the companies, the mill supports output volumes equivalent to roughly 200 million containers per day across Billerud's global packaging network.

Under the agreement, ABB will migrate several core systems to its latest platforms, including an upgraded ABB Ability System 800xA distributed control system (DCS), next-generation AC 800M controllers, enhanced quality control systems and updated drives technology. The integrated upgrade is intended to create a more secure and resilient automation environment, improve data handling and provide operators with clearer and faster performance insights.

Essity to start production of coreless kitchen towels

 **EUWID +** 04 March 2026 |  ~ 1 min | [Published in issue 10/2026](#)

Sanitary paper producer Essity will start production of coreless kitchen towels at its Mannheim paper mill in Germany. After launching Zewa Smart, a coreless toilet paper, in 2018, the company is now expanding its coreless technology to kitchen towels with the launch of Zewa Wisch & Weg. By eliminating the cardboard core, the new rolls use less material and transportation becomes easier, which significantly reduces waste and CO2 emissions, Essity says.

The company said it spent €20m on revamping production of its Mannheim mill. The mill's manufacturing technologies had to be adjusted to ensure that the coreless rolls are stable and allow transportation. "Doing without cardboard cores requires a highly precise winding process and special stabilisation techniques to ensure that the products retain their shape during transport, storage and at the consumer's home," said Carlo Russo, mill manager in Mannheim.

The integrated Mannheim mill has a capacity of 230,000 tpy of tissue paper on five paper machines and employs 2,300 people.

UPM to install heat pump at Augsburg paper mill

 **EUWID +** 04 March 2026 |  ~ 1 min | [Published in issue 10/2026](#)

UPM Communication Papers will install a heat pump at its paper mill in Augsburg, Germany. Construction is scheduled to begin in June 2026 and initial commissioning is expected shortly after the installation is complete, with continuous operation targeted in the first half of 2027, according to the paper producer.

The new system converts excess heat into 8 t of fresh steam per hour, matching the pressure and temperature required by the company's PM 3. The heat pump will be able to feed steam straight into the existing system, meeting approximately 16 per cent of the paper machine's steam demand, UPM says.

Steam production is one of the most energy-intensive steps in papermaking. With its new heat pump, UPM Augsburg will be able to generate process steam far more efficiently by using existing heat resources, saving approximately 6,000 t of fossil CO₂ emissions annually. The electricity needed to operate the system will be sourced from a dedicated power purchase agreement (PPA) for wind power.

RDM launches new recycled board grade

 **EUWID +** 04 March 2026 |  ~ 1 min | [Published in issue 10/2026](#)

Italian recycled board producer Reno de Medici (RDM) has launched Vincicoat Plus (V+), a new coated board grade expected to combine increased strength with substantial packaging weight reduction of up to 20 per cent.

According to RDM, recycled board is typically perceived to be less robust than primary fibre alternatives. To reduce this gap, the company developed this new chromo-duplex board, which delivers up to 15-20 per cent higher strength than the company's standard white-lined chipboard (WLC). V+ has a minimum of 85 per cent recycled fibre content and is currently available in grammages from 350 to 450 g/m², has a double top coating and is made from high-quality white recycled fibres combined with a new primary fibre mixture. RDM manufactures the new grade at its Santa Giustina board mill in Italy.

RDM stated that the board was especially suited for applications requiring high stability. Possible uses also include packaging for food and pharmaceutical products, for frozen and chilled products as well as for heavier products such as cosmetics, soaps and detergents.

Ence slips into the red in the wake of low pulp prices

 **EUWID +** 04 March 2026 |  ~ 3 min | [Published in issue 10/2026](#)

Spanish pulp producer and energy group Ence ended the 2025 financial year with a loss because of sharply lower pulp prices. The unfavourable price development and extraordinary charges for the company's efficiency and competitiveness initiatives had a particularly negative impact.

Ebitda dropped to €84m, while earnings before interest and tax (EBIT) slipped into negative territory at -€37m. The bottom line showed a net loss of €63m compared with a €20m profit in 2024.

The pulp business was dominated by a significant downturn in international benchmark prices. Ence reported that average net sales price stood at €503/t in 2025, which was €144/t lower than in 2024. When expressed in US dollars, the average list price stood at \$1,086/t, Ence stated in its latest report.

Annual sales volumes were virtually unchanged. Fourth-quarter sales volumes were 4 per cent higher in a year-on-year comparison, but declined compared with the previous quarter, partly as a result of industrial action.

Several strikes linked to the announced efficiency and competitiveness programme trimmed fourth-quarter output by around 22,000 t. Ence reported that cash costs increased by about €5/t as a result. Further walkouts followed at the Navia mill in January and February 2026 in response to the planned job cuts.

Specialty pulp gaining traction

From a strategic standpoint, Ence is pressing ahead with its shift towards higher-value specialty pulp. By 2025, these grades already accounted for 30 per cent of the company's pulp sales. They generated a margin around €37/t above the standard product range. By 2028, the company aims to lift the share of higher-margin specialty products to more than 62 per cent of total pulp sales.

A key milestone in this context was the start-up of the first fluff pulp line at the Navia mill in the fourth quarter of 2025, with a capacity of 125,000 tpy. Ence says this makes it the only European producer of fluff pulp based on eucalyptus fibre. The product targets the European market for absorbent hygiene products and is currently undergoing certification.

In view of the pressure on margins, Ence is stepping up its cost-cutting program. In the pulp segment, cash costs fell to €483/t in 2025, their lowest level since 2022. For 2026 and 2027, the company is targeting further savings totalling €30/t, split evenly between the two years.

The centrepiece of the savings programme is the company's efficiency and competitiveness plan, which is expected to deliver savings of around €22/t. It includes the use of AI-based solutions, process automation and the streamlining of operating procedures. The present value of the projected savings is put at around €200m, with a payback period of a little over one year. As part of the programme, 141 jobs will be cut across the group. To this end, Ence recognised a provision of €24m in 2025, which made a dent into full-year earnings.

At the same time, a €35m decarbonisation and cost-reduction project is currently underway at the Navia mill.

For 2026, Ence expects a much stronger market environment on the back of higher pulp prices, with increases to as much as \$1,330/t recently announced. The combination of a higher price level, a growing share of higher-margin specialty pulp and structural cost reductions is to underpin a lasting improvement in earnings.

Ence results				
million €	October - December		January - December	
	2025	2024	2025	2024
Key figures				
Sales	187	208	747	876
EBITDA	13	12	84	165
Operating result	-36	-8	-37	63
Net result	-33	-13	-63	20
Business area review				
Pulp				
Sales	131	153	534	683
EBITDA	3	6	56	138
Deliveries, in 1,000 t	245	235	967	968
Renewable Energy				
Sales	57	56	206	197
EBITDA	10	6	27	26
Source: Ence				

Burgo announces price increase for Mosaico specialty papers

 **EUWID+** 04 March 2026 |  ~ 1 min | [Published in issue 10/2026](#)

Italian **Burgo Group** has announced a price increase for its Mosaico specialty paper portfolio as of 1 April. Prices for label papers, flexible packaging papers and graphic specialities are to increase by 7-8 per cent. The adjustment is necessary to partially offset the ongoing pressure from raw material and other production costs, the company says.

Koehler Paper to increase price increases for label thermo and POS paper grades

 **EUWID+** 04 March 2026 |  ~ 1 min | [Published in issue 10/2026](#)

Koehler Paper, part of the German Koehler Group, has announced price increases for all its label thermal and POS papers. For deliveries from 1 April 2026, a global price increase of 10 per cent will apply, the company announced. The adjustments are driven by significant cost increases for pulp, chemicals used in the production of thermal papers, as well as in global freight and logistics structures.

Brigl & Bergmeister announces price increases from 1 April

 **EUWID +** 04 March 2026 |  ~ 1 min | [Published in issue 10/2026](#)

Brigl & Bergmeister has announced plans to raise prices across its entire product portfolio. The company intends to implement a hike of €60/t on label papers as well as flexible packaging and specialty paper grades from the second quarter of 2026. According to the company, persistently high energy prices and significantly increased raw material costs have made this step necessary.

Sappi announces price increase for Fusion Top Liner

 **EUWID+** 04 March 2026 |  ~ 1 min | [Published in issue 10/2026](#)

Sappi Europe also wants to implement a price increase of 7-8 per cent on its coated and uncoated premier Fusion Liner board, effective 1 April 2026. With this measure – described by the company as an “initial” step – Sappi aims to re-establish sustainable margins and support continued investment in innovation, product development and supply reliability.

Thunder Bay Pulp and Paper ends newsprint production

 **EUWID +** 04 March 2026 |  ~ 1 min | [Published in issue 10/2026](#)

Thunder Bay Pulp and Paper in Ontario, Canada, has produced its final paper reel on 19 February, Shane Moscrip, manager of paper operations, wrote in a post on LinkedIn. This will end newsprint production at the site, following a company announcement that it would withdraw from this market segment in the first quarter of 2026. In future, the plant will focus on production of northern bleached softwood kraft pulp (NBSK) and power generation. The newsprint machine will reportedly be decommissioned in a condition that allows for a possible conversion at a later date.

Södra reports losses in all business areas in 2025

 **EUWID** + 04 March 2026 | ⌚ ~ 2 min | [Published in issue 10/2026](#)

After a predominately weak performance in the third quarter of 2025, the business situation did not improve towards the end of the year for Swedish forest industry group Södra. According to the company's fourth-quarter report, all three major segments recorded revenue figures lower than in the previous year as well as negative operating results. At the group level, consolidated revenues in the fourth quarter declined by 11 per cent to SEK6.6bn, while the operating result swung from a profit of SEK726m to a loss of SEK981m.

For the full year 2025, Södra also reported a steep year-on-year drop in profits, even though sales declined by only 4 per cent to SEK28.3bn. Södra's Ebitda collapsed by 92 per cent to SEK352m and it booked an operating loss of nearly SEK1.3bn.

Södra attributed the weak results to the "triple effect of weak global demand, currency fluctuations and the imbalance between raw material prices and selling prices." Currency effects had a negative impact of nearly SEK1.8bn, while higher raw material prices burdened earnings by nearly SEK2.2bn, according to Södra. This was further compounded by negative price developments, which amounted to roughly SEK300m. Altogether, these factors "put pressure on the industrial structure," the company said.

High raw material costs and unfavourable currency effects owing to the weak US dollar and the strong Swedish krona were especially noticeable in the pulp business Södra Cell, the group's largest segment in term of sales and volumes. In addition, sluggish demand development further weighed on the pulp business. The market in Europe was weak, while demand and deliveries to Asia increased, resulting in lower profitability, according to Södra.

"The geopolitical situation has led to uncertainty regarding wood pulp flows, not least to and from the USA," the company said. In 2025, Södra produced 62,000 t more pulp, but its deliveries were 9,000 t below the prior-year level.

Production and deliveries in the fourth quarter of the year stood significantly higher compared to the same period of the previous year. However, the earnings trend was negative mainly due to unfavourable exchange rates and increased raw material costs.

Södra Cell expects pulp prices to improve slightly in 2026 but cautions that the softwood pulp business will come under increasing pressure due to rapid developments taking place in China and the growing use of eucalyptus pulp.

The roundwood volumes marketed by Södra Skog amounted to 16.7 million m³, down by 5 per cent compared with the previous year. Prices for roundwood were still high but started ticking steadily lower from the mid-year point onwards.

At the end of January, Södra finalised the sale of its forest holdings in the Baltic region. The 153,000 ha of land was sold to Ingka Group for €720m.

Södra results				
million SEK	October - December		January - December	
	2025	2024	2025	2024
Key figures				
Sales	6,606	7,403	28,302	29,487
EBITDA	-550	1,123	352	4,155
Operating result	-981	726	-1,290	2,630
Net result	-1,033	827	-1,323	2,488
Business area review				
Södra Cell				
Sales	3,457	3,880	14,919	16,121
EBITDA	-196	944	916	3,980
Operating result	-495	656	-258	2,867
Production in 1,000 t	497	436	1,905	1,843
Deliveries in 1,000 t	473	429	1,895	1,904
Södra Skog				
Sales	1,727	2,005	6,606	6,817
EBITDA	1	518	86	611
Operating result	-23	490	-14	513
Södra Wood				
Sales	1,324	1,464	6,458	6,258
EBITDA	-298	0	-206	236
Operating result	-377	-54	-463	23
Source: Södra				

Södra divests stake in biodiesel producer Sunpine

 **EUWID+** 04 March 2026 |  ~ 1 min | [Published in issue 10/2026](#)

Södra will sell its 25 per cent stake in the Swedish biofuels producer and developer Sunpine to Swiss energy company Varopreem, which already holds a 25.1 per cent stake in Sunpine. Varopreem was created at the beginning of the year following the acquisition of Swedish mineral oil group Preem by Varo Energy, a company owned by investment firm Carlyle and commodities trading group Vitol.

According to Södra, Varopreem exercised its first right of refusal after an offer was received from a third party and will now acquire all of Södra's shares in Sunpine. Varopreem will also acquire the shares in Sunpine owned by Swedish forestry company Sveaskog (25.1 per cent) and Dutch chemical company Lawter (24.7 per cent). The transaction is still subject to approval from the responsible authorities.

The first Sunpine refinery started operations in 2010. After various expansion investments, production capacity is currently around 230,000 t of biodiesel. Södra has held a stake in Sunpine since 2008 and supplied tall oil from its pulp production as feedstock for the refinery.

Grid dispute puts Altri's planned pulp mill in Galicia in severe jeopardy

Regional government deems project unfeasible in its current form

 **EUWID** + 04 March 2026 |  ~ 3 min | [Published in issue 10/2026](#)

Altri's pulp project in Palas de Rei, Spain, is facing significant obstacles. The regional government of Galicia has announced it will terminate the approval procedure for the dissolving pulp mill if Altri and its subsidiary Greenfiber fail to meet the requirements for the necessary grid connection within the statutory three-month deadline. This was announced on 20 February by Galicia's Minister for Economy and Industry, María Jesús Lorenzana.

According to reports, the so-called Gama project has been excluded from the state electricity plans up to 2030. The public grid operator Red Eléctrica Española is reportedly not planning any corresponding grid expansion in the province of Lugo, where the pulp mill is to be built, before at least 2030, meaning there is no transmission infrastructure earmarked for the new site. The Galician economy minister said that, to date, Altri has been unable to adequately meet the technical requirements defined in the project for connection to the specified substation. Without a secured power connection, the industrial component of the environmental impact assessment was deemed incomplete, so the project could not be implemented in its planned form, the Minister noted.

"We are acting consistently with what I have said from the outset: the key factor for this project is the connection to a substation. Since this is not envisaged, we have to proceed to archiving the procedure, as previously indicated. A notification to this effect was sent out this week," Ms. Lorenzana added. Altri or Greenfiber have three months to lodge objections to the decision. If they fail to provide sufficient evidence of a concrete grid connection within this period, the procedure will be discontinued, according to the authorities

The regional government of Galicia did not entirely rule out a fresh application and did not exclude the possibility that the project could be revived but described this as "difficult". The next round of national electricity planning will not take place for another four years.

Greenfiber describes decision as politically motivated

Greenfiber has responded to the latest developments with sharp criticism. "We are convinced that the central government's decision to exclude the Gama project from electricity planning is political rather than technical in nature, since no technical

justification has been provided for this exclusion," a company source told EUWID.

Greenfiber said it had submitted comments on the grid planning but had yet to receive a response from the competent ministry. Regardless of future plans by Spain's national grid operator, the company is reportedly examining various technical options for connecting to the power grid.

The source said that the company was reviewing the Galician regional government's notice on the possible initiation of termination proceedings and reserved the right to take appropriate legal action. At the same time, Greenfiber stressed what it sees as the advanced stage of project development, underlining its economic importance for Galicia and the forestry sector.

Years of widespread protests have accompanied the project

By pointing to political motives, Greenfiber is likely alluding to the sustained public and regional political resistance that the project has faced for years. Ever since the plans were announced, municipalities and civil-society organisations have repeatedly mounted fierce protests against the mill. Opponents fear damage to local ecosystems and water resources, as well as a further expansion of eucalyptus monocultures in a region where around 1.3 million ha are already said to be planted with this tree species.

Altri's Gama project has been in the preliminary planning phase since 2022 and, as recently as about a year ago, was still classified as a strategic industrial project by the Galician government. The plans actually envisage an industrial complex with a total pulp capacity of 400,000 tpy, to be operated by subsidiary Greenfiber. An initial 200,000 t of its capacity was to be used directly for the production of lyocell and/or other textile fibres.

Sanitary paper producers keep sales volumes stable amidst rising cost pressure

 **EUWID** + 04 March 2026 | ⌚ ~ 2 min | [Published in issue 10/2026](#)

The market for hygiene papers has shown little change in the first quarter of 2026, but remains fraught by uncertainties from the point of view of many producers. Industry representatives say there is a persistently “challenging market environment” characterised by high energy and raw material costs. At the same time, some manufacturers are trying to counter competitive pressure with targeted sales measures.

Retail customers increasingly looking for cost-effective products

As regards demand and sales volumes, some market respondents report stagnation. In the private consumption segment, manufacturers are observing that customers in the retail sector are increasingly turning to low-cost products.

While retail sales are described as stable to slightly positive, the away-from-home sector remains under pressure. Some producers attribute this to long-term changes in working habits and a persistently high proportion of employees working from home. Nevertheless, capacity utilisation of production facilities is expected to remain at a satisfactory level.

Demand is stable, but there is lack of clear growth stimuli, market insiders say. Therefore, targeted promotion to end-customers is currently gaining importance. In the retail segment in particular, advertising campaigns are said to generate short-term impetus for sales.

Costs are a major burden for tissue producers

On the cost side, tissue manufacturers continue to face substantial pressure. In addition to persistently high energy costs, raw material prices remain a key source of uncertainty. Pulp producers are currently aiming for price increases, which will lead to further challenges on the cost side. Against this backdrop, tissue producers report that negotiations with their suppliers are ongoing and, in some cases, increasingly tough.

Pulp supply is mostly described as basically stable. Higher raw material prices can be absorbed to a certain extent. However, passing these additional costs on to end customers is currently difficult, as consumers are increasingly opting for lower-priced products, tissue producers say.

Looking ahead to the second quarter and the remainder of the year, market players expect current conditions to continue. The

tissue industry is therefore likely to remain under pressure in the coming months. In addition to cost and demand risks, producers regard the persistently short planning horizons resulting from ongoing regulatory requirements as a further burden.

Business climate in printing and media industry rebounds

Statistical snapshot Germany

 **EUWID +** 04 March 2026 | ⌚ ~ 2 min | [Published in issue 10/2026](#)

In February, the seasonally adjusted business climate in the German printing and media industry improved again. The index compiled by the German print and media association (Bundesverband Druck und Medien, bvdM) showed a 1.1 per cent month-on-month increase to 90.2 points and stood 2.8 per cent higher than in February last year.

While companies assessed their current business situation more positively than in January, expectations for the coming six months deteriorated slightly.

The business climate indicator – derived from assessments of the current situation and business expectations – is regarded as a reliable leading indicator for production trends in Germany's print and media sector.

In February, the seasonally and calendar-adjusted business situation index recorded an increase to 87.7 points. This represents an increase of 3.4 per cent compared with January 2026 and 3.0 per cent year-on-year.

According to the bvdM, the improvement was driven by a more favourable assessment of the current situation. Some 12 per cent of surveyed companies rated their business situation as positive, 62 per cent as satisfactory and 26 per cent as negative. The seasonally adjusted balance improved by six percentage points, rising from -25 to -19 points.

Despite this recovery, the overall situation remains strained. Order backlogs in particular continue to weigh on the sector: only 6 per cent of companies assessed their order position positively, while 48 per cent reported a negative assessment and 46 per cent described it as neutral.

Business expectations of companies in the print and media industry for the next six months deteriorated slightly in February. The seasonally adjusted business expectations index fell by 1.1 per cent month-on-month to 92.8 points. However, the figure still stands 2.5 per cent above the level of the same month last year.

12.5 per cent of the companies surveyed expect business to improve over the next six months, while 28.5 per cent anticipate deterioration and 59 per cent of surveyed companies foresee no change. The resulting seasonally adjusted balance deteriorated slightly to -21 percentage points from -19 percentage points in the previous month.

Buyers in many paper markets in Germany brace for price increases

Paper mills under pressure from sluggish growth and high costs

 04 March 2026 | ~ 6 min | Published in issue 10/2026

Many paper mills find themselves in a difficult position as high production costs coincide with sluggish or even declining delivery volumes. Only few producers and merchants are currently satisfied with their fine paper sales. Faced with persistently weak margins, numerous companies are therefore seeking to push through price increases.

EUWID Price Watch Germany February 2026				
Prices in € per tonne free delivered unless otherwise stated	February 2026	January 2026	February 2025	
Fine paper				
Woodfree uncoated				
A4 C-grade, double paper	760 - 820	760 - 820	800 - 1.000	
A4 C-grade, non-branded paper	770 - 800	770 - 800	820 - 950	
Other grades 80 g	890 - 900	890 - 900	1.000 - 1.100	
Other webs 80 g	870 - 900	870 - 900	940 - 1.050	
Woodfree coated				
Starch, double coated, 100 g	870 - 930	870 - 930	1.000 - 1.100	
Resin, double coated, 100 g	850 - 900	850 - 900	920 - 990	
Publication paper				
Newsprint 40 g (standard)	570 - 590	570 - 590	600 - 620	
Newsprint 40 g (special)	580 - 600	580 - 600	610 - 620	
Newsprint 40 g (branded)	570 - 590	570 - 590	600 - 620	
LWC offset 80 g	770 - 800	770 - 800	780 - 810	
SC offset 80 g (S)	860 - 870	860 - 870	880 - 900	
SC offset 80 g (S)	860 - 880	860 - 880	880 - 900	
Corrugated case material				
Prices for uncoated case material				
Unbleached kraftliner 170 g	850 - 870	850 - 870	880 - 890	
Superbleached uncoated kraftliner 170 g	770 - 800	770 - 800	770 - 1.000	
White-top kraftliner 180 g	1.070 - 1.100	1.070 - 1.100	1.050 - 1.100	
Recycled corrugated case material				
Schnee	540 - 550	540 - 550	600 - 630	
Wellwood	570 - 580	570 - 580	640 - 660	
Tactilon E	600 - 610	600 - 610	670 - 690	
Tactilon R	590 - 600	590 - 600	660 - 670	
White-top recycled, coated	890 - 910	890 - 910	900 - 930	
White-top recycled, 180 g, 100/10/10	790 - 800	790 - 800	770 - 780	
Cartonboard				
Industrial shipboard	770 - 780	770 - 780	790 - 800	
GD 4	850 - 860	850 - 860	870 - 900	
GD 5	1.040 - 1.050	1.040 - 1.050	1.040 - 1.070	

Only use these tags: [table](#), [tr](#), [td](#), [th](#), [thead](#), [tbody](#), [tfoot](#), [div](#), [p](#), [b>, *,*](#)

at the end of the year of the usage reports "Standardized prices, base prices, latest prices and price changes" (DIME) are available for the accuracy of the price information.

In the market for woodfree paper, there was definitely momentum towards a price hike in March. Industry experts describe the envisaged pricing plans as ambitious, noting that the current market environment is not really conducive to hikes but this will definitely put pressure on buyers. In the market for graphic recycled papers, producers are trying hard to maintain the price stability they have become accustomed to.

Players in the kraftliner market are closely watching the outcome of the price round for brown recycled corrugated case material. If paper mills manage to lift prices for recycled grades, it is conceivable that producers of brown kraftliner could announce their own mark-ups. For February, however, industry insiders predict stable prices for kraftliner.

Significant price increases announced for fine paper

Given the development of business in the woodfree paper segment, the mood in the German paper and printing industries has not really improved. Companies say they are not very satisfied with their day-to-day business and the utilisation rates on their production facilities. Not only are there no indications of a rebound, the expectations are starting to turn gloomy. Nevertheless, paper producers have announced price increases and merchants are willing to go along with these.

Amid modest demand for both uncoated and coated woodfree grades, the announcements of price hikes by nearly all European producers are the dominant topic in the paper and printing industries. Even though basically all segments of this market are oversupplied, producers are pushing for these mark-ups to be implemented soon. Buyers say suppliers are entering talks well prepared and with clear determination.

In general, the announcements for ordinary grades target price increases of 5 to 10 per cent. In some cases, a more specific figure of €50-60/t was mentioned. The timing varies between the beginning of March and beginning of April. Talks are picking up pace and are likely to become more intense in March. Observers expect a tangible result to emerge by the start of the second quarter at the latest. But so far, it is unclear if the pricing of uncoated and coated fine paper grades will move in tandem.

In recent months, a wide price range has become established on the fine paper market in Germany. However, several industry representatives report a degree of stabilisation in January and February. This applied not only to price levels but also activity at paper mills and merchants.

Nevertheless, when several higher-volume contracts were up for grabs at the beginning of the year, fierce competition between suppliers pushed prices for these deals down further. Against the backdrop of low machine utilisation and subdued business activity among merchants and printers, the market remains clearly price-driven, according to industry observers.

For some time now, suppliers have not been able to generate meaningful margins with standard paper grades, and even specialty products like digital printing paper are coming under mounting competitive pressure. Experts warn that both paper mills and printing companies are fighting for economic survival. Paper merchants, too, are said to be operating with strained balance sheets, EUWID was told. Respondents caution that this sustained pressure is likely to have repercussions for print customers as well.

Against this backdrop, a more resolute pricing strategy is taking shape as industry representatives signal their determination to implement the announced price increases consistently and in full, according to some market players. Other EUWID respondents believe this measure is aimed at increasing the average prices and at least eliminating the so-called special or object prices, which are often well below the otherwise typical price range.

Dissatisfaction among producers of graphic recycled papers

Players in the market for coated and uncoated recycled printing and writing paper express dissatisfaction with their business volumes. Demand has been rather weak recently, which experts attribute to the generally sluggish economy. In addition to the weak economic environment, ongoing digitalisation is also weighing on the market. Machine utilisation rates remain unsatisfactory in many places. Only a few manufacturers are reportedly managing to buck the market trend and gain additional volumes. Overall, however, buyers report no difficulties in securing supplies of coated and uncoated recycled papers.

Even the financial difficulties at the Hainsberg paper mill – which has been idled since January and is now in insolvency proceedings – have not significantly affected the overall supply situation, according to several market experts. Should customers seek alternative sources, European producers are said to be ready and willing to step in, EUWID was told.

The structural demand decline is also weighing heavily on the market for recycled magazine and catalogue papers. The LWC market is shaped by excess supply, including strong competition amongst the various publication paper grades. Availability remains ample, and low prices are reportedly being offered for spot transactions, particularly in markets outside Germany.

There are no indications of growth in delivery volumes for either coated or uncoated recycled paper. Demand is stalled and the substitution of fresh-fibre papers has recently slowed due to the large price differences, industry experts agree.

Even though the recycled papers segment is known for stable pricing, industry experts noted a certain willingness to compromise on the part of producers around the turn of the year. Faced with low fine paper prices, manufacturers of recycled grades came under pressure and reportedly adjusted prices, particularly for cut-size products and in the sheet business.

Kraftliner producers remain tight-lipped on pricing plans

Players in the German market for fresh-fibre corrugated case material are keeping a close eye on the results of the talks regarding the price hikes announced for brown recycled papers as of March. The negotiations for recycled corrugated case material were in full swing at the time the market survey was conducted. Corrugated board sector representatives note that only a firm rise in brown recycled corrugated case material would open the door to similar initiatives in brown kraftliner.

For the time being, however, kraftliner producers have not signalled any price increases, supply chain participants unanimously reported in the final week of February. Following the reductions at the turn of the year, prices for brown and white-top kraftliner as well as semi-chemical fluting remained stable in February.

Overall, market experts from both the corrugated board and paper industries describe broadly stable volume trends for kraftliner in February. Compared with recycled containerboard, the market is described as relatively balanced, although availability remains good.

Capacity utilisation on paper machines is described as relatively good, which market participants attribute in part to export orders to non-European markets. Demand from Germany and elsewhere in Europe has also been described as satisfactory in recent weeks. Industry insiders say they were able to meet their production and delivery targets in February.

Efforts to potentially substitute kraftliner with recycled containerboard grades also remain a topic in the market survey conducted by EUWID. Representatives of the corrugated industry say kraftliner is now only being used “where there is no alternative”, for example in packaging for the food and automotive industries as well as in cold chain applications.

The announcement by a Nordic paper producer in February that it is considering a future entry into the brown kraftliner market also drew attention. In light of the capacity expansions implemented in recent years, contacts in the corrugated sector reacted with scepticism. In their view, the European kraftliner market is already adequately supplied.

European Council aims to quickly strengthen industrial competitiveness

 **EUWID+** 04 March 2026 |  ~ 4 min | [Published in issue 10/2026](#)

Europe's heads of state and government have signalled their intention to reinforce the EU Single Market, calling for "one market for one Europe" as a guiding principle for the coming years. The initiative is set to gain momentum in 2026 and 2027, with political leaders aiming to remove remaining barriers and deepen economic integration across the bloc. In parallel, they want to press ahead this year with the development of the so-called "28th Regime". The concept is designed to offer companies a single, harmonised legal framework under which they can operate across all 27 Member States, reducing regulatory fragmentation and facilitating cross-border business within the European Union.

According to António Costa, President of the European Council, the initiative was agreed during a meeting in Alden Biesen, Belgium, on 12 February. The political objectives outlined there are due to be translated into concrete commitments at the next European Council meeting in March, paving the way for implementation. Leaders are aiming for tangible results as early as 2026.

At the same time, Costa stressed the need for further efforts to simplify legal requirements in order to enhance the competitiveness of European companies. On energy policy, he underlined that high electricity prices remain a structural concern for many industries. The focus, he said, should be on pragmatic solutions tailored to the specific circumstances of individual Member States and energy-intensive sectors.

In order to protect strategic industries and reduce dependencies, the heads of state or government intend to identify their dependencies and tackle them with the help of a diversification strategy. In addition, they want to support investment in Europe by subsidising private investment.

Results for industry to be tangible on the factory floor as early as 2026

Ahead of the meeting, signatories of the Antwerp Declaration urged EU leaders to ensure that the forthcoming Clean Industrial Deal delivers measurable benefits for industry as early as 2026. In their view, policy announcements must translate into concrete improvements "on the factory floor", particularly for energy-intensive sectors under mounting competitive pressure.

A central demand is a structural reduction in energy and carbon costs. Industrial representatives argue that current price levels are too high to allow European manufacturers to compete globally. They stress that the burden is driven not only by volatile commodity markets, but also by regulatory levies and carbon-related charges, which they say require urgent review if Europe's

industrial base is to remain viable.

The signatories also call on the EU to set a clear example by prioritising the purchase of products manufactured in Europe. This should be achieved, they argue, through targeted public procurement policies and EU-endorsed private buyer initiatives designed to strengthen domestic value chains.

In addition, the declaration urges policymakers to empower both corporate and private consumers to opt for net-zero and circular products. Such choices, it says, must be underpinned by transparent and comparable product information, including verified environmental and carbon footprint data.

The Antwerp Declaration for a European Industrial Deal was published in 2024 and has since garnered broad support. More than 1,300 organisations have signed the initiative, including industry associations representing the metals, glass, plastics and paper sectors, among others.

Rise in carbon costs must be prevented for the time being, claims Cepi

In a statement the Confederation of European Papier Industries (Cepi) emphasises that the pulp and paper industry has emerged as a relative stronghold in the current crisis of the industrial sector despite its own difficulties. Cepi says a Deloitte report analysing the industry's development since the publication of the Antwerp Declaration highlights biomass utilisation and material circularity as pivotal factors enhancing Europe's industrial competitiveness.

However, Europe still hinders competitiveness and development related to biomass by a multitude of laws, e. g. in the forest sector. Moreover, circularity, and notably collection of paper for recycling is still very fragmented across Europe, reports Cepi.

The Deloitte report also underlines the shortfalls and complexity of public instruments that fund innovative industrial decarbonisation projects. One reason for this is that revenues from the EU Emission Trading Scheme (ETS) are not redistributed well enough, claims Cepi. The size of the funding which could potentially be generated by member states could be a game changer for the industry's capacity to reach decarbonisation objectives by 2030, reports the confederation.

"The European pulp and paper industry has already reduced its greenhouse gas emissions by more than 50 per cent compared to 2005 levels," explains Jori Ringman, Cepi Director General, adding that in the current context of high energy prices, low demand, high costs and an ongoing trade war, the industry has no choice but to ask the heads of state or government to shelve all measures that would increase carbon costs until 2030.

EU-India free trade agreement to phase out tariffs on paper, board and fibre over ten years

 **EUWID** + 04 March 2026 | Valeria Buß | ⌚ ~ 3 min | Published in issue 10/2026

What does the EU's free trade agreement with India mean for the European paper industry? As reported before, paper, board, recovered paper and pulp are all covered by the agreement. In response to an EUWID inquiry, the Confederation of European Paper Industries (Cepi) now provided more details which show that trade barriers will be removed, but not so soon, so changes are not expected in the short term.



India is an important export destination for recovered paper from the EU

Cepi says that according to the European Commission's Directorate-General for Trade (DG Trade), the tariffs will be removed gradually. "We are pleased to inform you that all tariff lines in chapters 47, 48 and 49 will be fully liberalised by India after maximum ten years, with the majority of them after seven years," DG Trade said.

HS Chapter 47 of the Harmonised System (HS codes) covers recovered paper and pulp, while HS Chapter 48 covers paper and board as well as converted products and HS Chapter 49 printed products.

According to DG Trade, India's applicable duties for EU imports range from 5,5 per cent (Chapter 47) to 11 per cent (Chapter 48 and some lines in Chapter 49).

Recovered paper exports to India jump by 60 per cent in 2025

The free trade agreement could be particularly significant for the recovered paper industry. Eurostat statistics show that of the 5.97 million t of recovered paper that the EU exported to third countries last year, 2.13 million t went to India – a share of 36 per cent. This is a significant 60 per cent increase on 2024, when 1.34 million t of recovered paper were exported to India, accounting for only 24 per cent of total exports. Within a year, the export market with India has thus grown rapidly.

Within the EU, Italy plays a particularly important role in the export of recovered paper to India. In 2025, 34 per cent of the volumes exported by EU countries to India came from Italy – around 725,000 t. Spain was the second largest exporter to India with 363,000 t of recovered paper in 2025.

The Italian recovered paper association Unirima welcomed the agreement with India. It was still too early to assess the possible impact on the market, though, it said. Above all, the association hopes that bureaucratic hurdles will be removed and processes simplified.

EU pulp and paper imports from India are limited

The agreement could also bring relief for pulp producers in the EU. According to preliminary figures from Cepi, they exported around 400,000 t of pulp to India last year. Exports of paper and board were at a similar level.

Imports from India have played a less important role in the EU to date. Pulp imports from the country were close to zero in 2025, while 60,000 t of paper and board were imported. According to Cepi, India has a market volume of around 20 million t of paper and board, with consumption at 21 million t. The country also consumes more pulp (6 million t) than it produces (4 million t).

The extent to which market opening will affect trade between India and the EU remains to be seen. Cepi points out that tariffs are not the only hurdle complicating trade. The association notes that India is not one single market, but a federation of states with many different rules, which complicates market access for European exporters. Despite high potential for market growth, access to Indian markets has been limited so far due to factors including high tariffs, numerous other charges and complex duty regulations, according to Cepi. Other challenges include differences between central and local regulations, a complicated taxation system and outdated patent and registration management. Overall, bureaucrazy was extensive, the association concluded.

German recovered paper exports hit new low in 2025

 **EUWID+** 04 March 2026 |  ~ 2 min | [Published in issue 10/2026](#)

Germany exported significantly less recovered paper last year than in 2024. Exports fell by 15 per cent to 1.46 million t, according to figures published by the German Federal Statistical Office (Destatis) last week.

This is the lowest level observed since Destatis began publishing the figures back to 2006. At the same time, imports of recovered paper have risen steadily, as was also the case between 2024 and 2025.

Germany thus remains a net importer of “paper or board for recovery”, with imports exceeding exports by 3.6 million t.

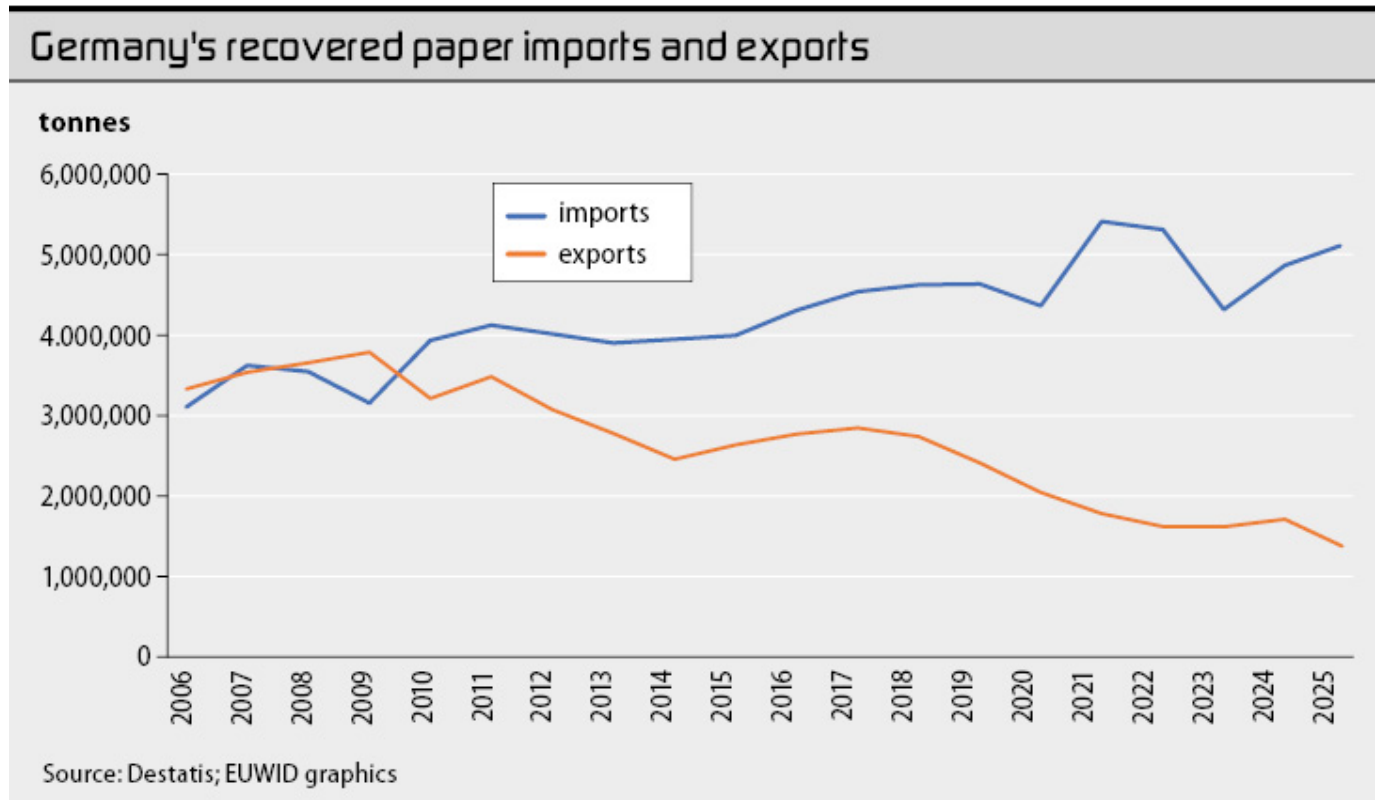
The only years with a slightly higher balance were 2021 and 2022, which were marked by the Covid-19 pandemic.

Recovered paper shipments from Germany to the Netherlands and Austria fell particularly sharply in 2025, declining in both cases by 23 per cent or more than 100,000 t compared to the preceding year. Exports to France declined by about 70,000 t. Nevertheless, these three countries remain the most important export markets for Germany by far.

In contrast, direct shipments to some Asian countries rose more strongly last year. According to Destatis, Germany exported 28,000 t of recovered paper to India and 18,000 t to Thailand. That was around 60 and 90 per cent more than in 2024, respectively.

It is likely that large quantities of recovered paper exported from the Germany to the Netherlands and Belgium were also ultimately shipped to Asia. However, this intermediate trade is not captured by the statistics office’s figures.

The total value of German recovered paper exports stood at €236m in 2025, compared with €273m for 1.71 million t in the previous year. With that, the apparent average price increased slightly from €159 to €161 per tonne.

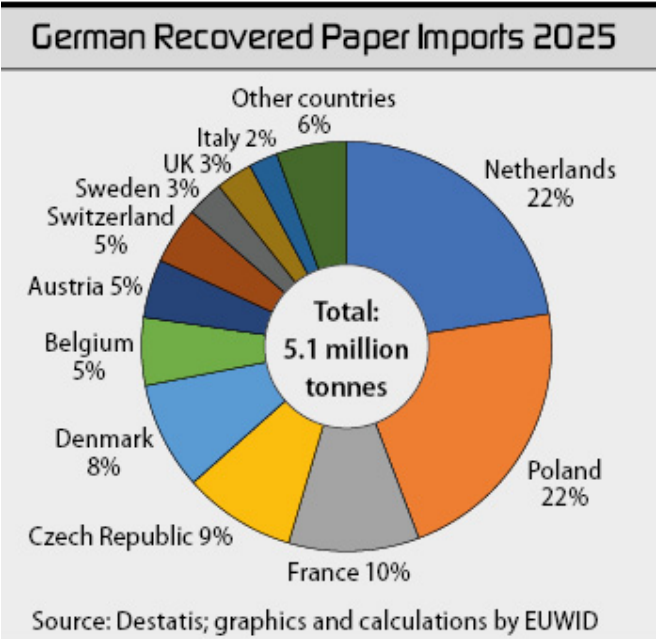
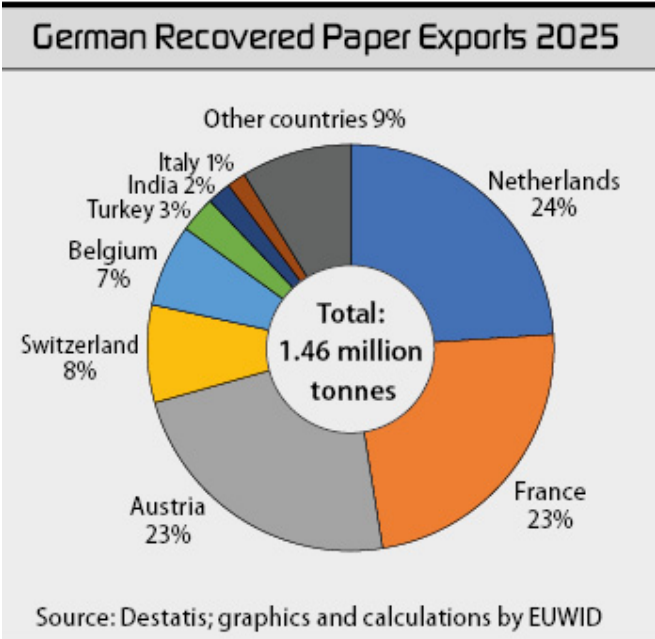


More recovered paper imports from Czechia, Austria and the Netherlands

Germany's imports of recovered paper reached 5.08 million t and a total value of €1.13bn last year. In 2024, the figure was 4.85 million t with a value of €1.06bn.

As on the export front, the Netherlands headed the list of Germany's import partners. In 2025, Germany imported 1.14 million t from the neighbouring country, 11 per cent more than in 2024. Poland ranked second with an increase in delivery volumes of 5 per cent to 1.11 million t.

In percentage terms, recovered paper imports from Czechia and Austria rose the most in 2025, growing by 24 and 20 per cent, respectively. In contrast, the German Federal Statistics Office recorded a significant decline in volumes from the United Kingdom. British recovered paper shipments to Germany fell by almost a quarter to 147,000 t, the lowest level since 2014.



UK confirms timeline for digital tracking for DWS introduction

 **EUWID+** 04 March 2026 |  ~ 1 min | [Published in issue 10/2026](#)

The UK government will make its new Digital Waste Tracking system (DWT) mandatory for permitted and licensed waste receiving sites from October 2026, including sites handling recovered paper and other secondary raw materials.

The Department for Environment, Food & Rural Affairs (Defra) and the Environment Agency confirmed a phased rollout, beginning with a private beta in autumn 2026 and a public beta in spring 2027. The mandatory rollout for phase two has been scheduled for October 2027. From then, reporting through Digital Waste Tracking will become compulsory for all operators within scope.

PackUK outlines £1.56bn EPR plan for 2026/27

 **EUWID +** 04 March 2026 |  ~ 2 min | [Published in issue 10/2026](#)

The UK's packaging EPR scheme administrator PackUK has published its operational plan for 2026/27, outlining a total forecast fee recovery of approximately £1.56bn and a series of measures aimed at stabilising the system in its second year.

According to the plan, chargeable disposal costs for local authorities across the UK are forecast at £1.47bn, with a further £28m for administration and £60m for impairment, bringing the total anticipated fees to £1.56bn for the 2026/27 operational year.

For the first time, illustrative year-2 disposal fees published in December 2025 incorporated eco-modulation, with green, amber and red fee bands reflecting recyclability performance of packaging. Final per-tonne fees cannot be confirmed until all H2 2025 data have been submitted (deadline 1 April 2026) and validated by the four environmental regulators. Where producers failed to submit recyclability assessment methodology (RAM) data for H1 2025, PackUK will apply the material-specific green/amber/red ratios from H2 data to H1 tonnages, replacing them with verified figures if resubmitted later.

Furthermore, the next iteration of the Recycling Assessment Methodology (RAM 2027) is scheduled for publication by 1 July 2026.

After significant producer resubmissions in year one, PackUK plans to limit recalculations in 2026/27 in order to improve predictability. For producers, first notices of liability are due by July 2026, with formal recalculations scheduled for November 2026 and at year-end (March/April 2027), plus a possible additional recalculation in February 2027.

Digital service and PRO appointment

PackUK will continue to develop its bespoke digital service, which underpins producer registration, RAM data submission, validation and liability calculation. The system is also being expanded to allow local authorities to register and submit financial details for payments.

The appointment of a producer responsibility organisation (PRO) is expected in March 2026. The PRO, envisaged as an independent, producer-led body, will gradually take on delegated functions such as modulation development and public communications, while sovereign functions – including fee setting and payment administration – remain with PackUK.

UK prices unchanged in most market segments in February

Overcapacity remains a key factor / RCCM producers set to increase prices

 04 March 2026 | ~ 11 min | Published in issue 10/2026

Paper and board prices in the United Kingdom showed little movement in February. The publication paper market was calm in this regard in the middle of the quarter, and prices in the fine paper market also remained largely unchanged. However, fine paper manufacturers want to see prices rise, with various producers announcing increases to take effect in March or early April.

EUWID Price Watch UK				
February 2026				
Prices in £ per tonne (net delivered unless otherwise stated)	February 2026	February 2026	January 2026	February 2025
	£	£*	£	£
Fine paper				
Woodfree uncoated				
Copy paper 80g M8 grade	760 - 820	860 - 900	760 - 820	820 - 900
Copy paper 80g M4 grade	770 - 790	860 - 900	770 - 790	790 - 860
Offset news 80g	890 - 900	920 - 960	890 - 900	890 - 920
Offset news 100g	770 - 860	940 - 960	770 - 860	860 - 900
Woodfree coated				
News, double coated, 100g	820 - 890	910 - 1,010	820 - 890	890 - 940
Recs, double coated, 100g	770 - 820	870 - 900	770 - 820	860 - 900
Publication paper				
Standard uncoated 40g	480 - 510	540 - 580	480 - 510	480 - 510
Standard uncoated 42g	480 - 520	530 - 560	480 - 520	480 - 520
Standard uncoated 48g	580 - 590	570 - 600	580 - 590	580 - 590
Improved uncoated 32g, 50x40	530 - 560	600 - 630	530 - 560	530 - 560
LC offset 60g	680 - 690	720 - 760	680 - 690	680 - 710
LC offset 70g, 40	570 - 590	600 - 620	570 - 590	580 - 620
Corrugated case material				
Primary fibre corrugated case material				
Unbleached fullfibre 120 gsm European quality	690 - 720	790 - 820	690 - 720	670 - 730
White top fullfibre 140g, European quality	880 - 870	910 - 990	880 - 870	780 - 840
Recycled corrugated case material				
Recycled Fulling 140g	580 - 570	570 - 600	580 - 570	580 - 580
Recycled Fulling 160g	590 - 580	570 - 600	590 - 580	590 - 590
Recycled Fulling 40g	530 - 560	580 - 620	530 - 560	530 - 570
Recycled Fulling 80g	520 - 560	590 - 620	520 - 560	520 - 570
Testliner B	580 - 570	570 - 600	580 - 570	580 - 580
White top fullfibre, grade B, 140g	640 - 660	710 - 730	640 - 660	640 - 660
Cartonboard				
M8	960 - 980	1,000 - 1,010	960 - 980	950 - 970
GC 1	880 - 1,000	1,000 - 1,140	880 - 1,000	900 - 1,010

The UK market for corrugated case material was seasonally quiet in February. Against the backdrop of the price increase discussed on the continent for 1 March, some manufacturers also informed their UK customers, but substantive negotiations failed to materialise yet, and many converters doubt that the increase can be enforced given the availability of competitively priced imports from mainland Europe. With demand unchanged, contract prices for cartonboard remained stable, while the spot market was fiercely competitive and characterised by aggressive pricing.

Fine paper prices stand at a crossroads

In February, manufacturers of woodfree coated and uncoated paper made another attempt to raise their sales prices. They explained that prices needed to be adjusted to reflect increased costs in order to return to profitability, pointing to the partly negative business results. As it is difficult to change costs, prices must therefore be adjusted, they say.

There have been a number of price announcements in recent weeks for both coated and uncoated grades. The latest increase to be made public came from Sappi, which is asking €50/t more for woodfree coated reels on the continent from 16 March and the same amount in pounds sterling in the UK. Other paper manufacturers are demanding similar amounts or percentages of up to 10 per cent, at various points in March or early April. In addition, there is one producer who has already demanded higher prices earlier than the others.

As far as the implementation of higher prices is concerned, there was still uncertainty in the last week of February. Paper manufacturers are leaving no doubt that they are serious about their demands, as can be seen from the fact that a large part of Europe's production capacity is behind the price demands. Whether and to what extent the increase can be implemented in view of the prevailing market conditions remains to be seen.

In the first two months, demand for fine paper has stabilised, which makes manufacturers optimistic that they will be able to push through their price demands. Demand is roughly at the same level as at the beginning of last year, insiders report.

Some market participants see opportunities to implement at least part of the announced increases in the market, while others consider the attempt to be mainly a measure to prevent prices from falling further. In view of overcapacity, the average capacity utilisation of paper manufacturers remains below what is considered economically viable. However, there have been shifts in market share in the UK among paper manufacturers in recent months, as one merchant delisted a manufacturer and other producers are taking its place. Information on paper manufacturers' capacity utilisation therefore varies from plant to plant.

Market insiders report that the battle for orders is currently most intense in the uncoated paper market segment. The range of prices on the market remained wide for all types in February, and special offers continue to be available throughout the fine paper market. Insiders report that there were not many price changes in February.

Publication paper market bracing for the next round of wrangling over prices

"Prices have to go up," is the current mantra among publication paper manufacturers who continue to grapple with high costs and weak markets. British publication paper prices remained largely unchanged in February since most contracts ran all quarter, but the bell has already been sounded for the next round of price talks. Sappi has announced a hike of €50/t for coated mechanical paper grades, among others, to take effect as soon as 16 March. A £50 increase has been announced for the UK. Another supplier has approached its customers seeking higher prices for publication paper, which will also apply as of March.

Other publication paper producers have made similar comments, stressing that they will have to sit down with buyers to discuss price increases. For standard newsprint, for instance, mark-ups in the region of 4-6 per cent were being discussed.

While the need for higher prices is clear from producers' perspective, whether they can actually push them through will depend on the market climate.

Within the publication paper sector, operating rates are currently the healthiest for newsprint, where machines appear to be averaging well above 80 per cent. Machines making SC paper are thought to be running at an average of 75 per cent of their capacity, with the same true of LWC paper machines after the latest shutdowns.

Despite a few machines having been taken out of production, the surplus supply situation on the magazine paper market has not eased to a significant extent. In the newsprint segment, insiders report that only average imports at most are currently arriving from North America. This market is tighter than in Europe, prices are at least as high, and a number of mills have already been shut, all of which is curbing exporters' appetite for the more than well-supplied European market. However, the structural decline in paper consumption is continuing, and in the UK the contraction is in some cases progressing even faster than in other parts of Europe.

Industry monitor ABC's data for December 2025 shows sharp year-on-year declines in print circulation among the highest-selling national newspaper titles. With the exception of the free daily newspaper Metro, whose circulation was unchanged, most of these titles saw losses of between 10 and 20 per cent. For newspapers whose circulation is no longer audited by ABC, it is reasonable to assume that their print editions are experiencing a similar downward trend.

The British magazine market is showing a similar pattern, with total circulation for ABC-audited magazines down 9 per cent last year. Only 10 out of 131 magazines managed to record growth.

Dwindling demand for print products is also evident in the pressures facing the printing industry. Most recently, major publisher Reach – owner of the Daily Mirror, Daily Express, Sunday Mirror and other titles – announced plans to shut two of its three remaining print sites in order to consolidate newspaper production.

UK containerboard market remains subdued in February as price hike attempts loom

Seasonally, the UK market for corrugated case material and corrugated packaging presented a quiet picture in February. Paper producers reported that sales volumes were broadly in line with expectations, but there was no sign of any tangible upturn.

Inventories along the supply chain are still described as high. Operating rates at paper mills stand at around 80 per cent, depending on the site.

By early February at the latest, the most recent downward price adjustment in the UK had been completed. In annual contracts in particular, some customers secured reductions of up to £25/t for brown recycled corrugated case material (RCCM) in January. Others achieved decreases of slightly more than £10/t, while a number of market participants reported no discounts at all.

However, the €80/t price increase being intensively discussed on the European mainland for implementation from 1 March appears to be casting its shadow over the UK as well. In the final week of February, no substantive negotiations had yet taken place. Some producers sent out announcement letters, but follow-up talks remained limited.

Numerous converters doubt that a 1 March increase can be enforced in the UK. They point to continued substantial inflows of competitively priced material from continental Europe. Even after taking freight costs into account, these volumes are reportedly offered at prices only marginally above continental levels. According to one observer, the UK market is thus serving as a “vent” while price hike attempts are ongoing on the Continent. As in other European markets, questions are also being raised as to

whether increases of the magnitude demanded are realistically achievable.

For other grades, including brown and white-top kraftliner as well as white-top testliner, no price reductions were recorded and, at the time of going to press, no concrete increase announcements had been made on the UK market.

The situation in the UK corrugated sheet and packaging market remains unchanged. Underlying demand is described as stable but unspectacular. Following capacity closures by larger integrated producers, the shift of orders towards smaller, independent converters has intensified. These companies report a high number of new enquiries, some of which are only partially accepted or even declined in order to safeguard service quality for existing customers or because the offered prices are considered insufficient.

Lead times for corrugated sheets remain at four to six weeks, and in isolated cases extend to as much as eight weeks. The latest containerboard price reductions have therefore largely been passed on only in indexed contracts.

For many packaging manufacturers, service quality and security of supply remain clear priorities. Against this backdrop, prices for corrugated packaging have remained broadly stable.

At the time of publication, no pre-Easter upturn had yet materialised. Although March typically brings a slight improvement compared with February, the market environment continues to be characterised by uncertainty and cautious optimism.

At the same time, the market is in a holding pattern ahead of the start-up of the new containerboard machine at Eren's Shotton mill. Market participants expect further capacity adjustments in both paper production and converting in the medium term.

Solid demand but no turnaround on British cartonboard market

Demand for cartonboard in the UK remained solid in February. Many market participants report order levels in line with or slightly above expectations. However, they stress that there can be no talk of a turnaround. Ordering patterns remain erratic. Some observers assume that converters are currently replenishing inventories that had been significantly reduced before Christmas.

The generally uncertain economic environment and subdued consumer sentiment due to lower disposable incomes continue to weigh on demand. Market sources also point to the growing impact of weight-loss medication, which is said to be increasingly affecting food retail. In addition to consumers with New Year's resolutions, users of such medication are reducing their food consumption. The effect is now considered large enough to influence packaging demand in the food and beverage sector. This is particularly significant in the UK, where around 75 per cent of cartonboard consumption is linked to this segment.

Existing overcapacities in board production and converting remain evident, although many market participants recently reported slightly longer lead times for GC board. Instead of four weeks, lead times are often said to extend to six to eight weeks. Nevertheless, GC board remains available at short notice – not only from European mills but also from suppliers in Asia and South America. Asian producers in particular are intensifying cooperation with UK traders, who are building up larger inventories. This increases the willingness of UK converters to use such material.

The situation is more strained in the GD segment, where demand declined by six to eight per cent in 2025. Suppliers from Central and Western Europe are suffering from strong competition from Eastern Europe as well as low-priced GD and GC board from Asia.

Overall, competition remains heavily price-driven. Significantly more volumes than in the past are now being tendered, including by large converters and end users. Even major manufacturers are pursuing contracts they would previously have left to smaller suppliers. The spot market is described as “extremely active”. Suppliers are signalling a high degree of price flexibility where additional volumes are available.

At the same time, voices are growing louder that a price floor may have been reached in the GD segment. Some suppliers state they are not interested in deals at around £600/t. In the GC segment, however, competition remains fierce; European suppliers are reportedly accepting very low prices in order to defend market share against Asian competition, with some observers suggesting these levels are close to the economic pain threshold.

A similar picture is emerging in converting. Many companies have invested in new machinery in recent years. “These are hungry beasts that need to be fed,” one market insider commented.

Against this backdrop, experts expect further consolidation of converting capacities in the UK. The sale of Coveris plants and the management change at Graphic Packaging International in the US suggest that the profitability of individual sites will be scrutinised closely in the future – similar to recent developments in the corrugated sector.

Market observers also welcome the fact that the funding gap in the first year of the new EPR scheme will not be covered by retrospective charges to producers, but instead by the UK government. This is viewed as a positive element within a system that, according to some suppliers, has so far rather dampened the hoped-for growth through plastic substitution.

Market participants are also closely monitoring geopolitical developments. The newly introduced uniform 15 per cent import tariffs in the US could prompt producers from Brazil, India and China to ship as much volume as possible to the US under still favourable tariff conditions, potentially diverting volumes away from the European market.

The escalation of the Iran conflict, particularly a blockade of the Strait of Hormuz, is also expected to impact shipping costs and thus cartonboard prices of deep sea cartonboard in the UK.

UK key market data						
November 2025						
in tonnes	November			January - November		
	2025	2024	%	2025	2024	%
Production						
Corrugated case materials	120,018	123,534	- 2.8	1,283,753	1,334,101	- 3.8
Recycled Fluting	58,711	62,801	- 6.5	621,683	661,518	- 6.0

Testliner	61,307	60,733	+ 0.9	662,070	672,583	- 1.6
Parent reels of tissue	59,190	55,097	+ 7.4	644,450	662,387	- 2.7
Other papers and boards, incl. printing and writing paper	90,195	88,616	+ 1.8	1,001,664	1,050,817	- 4.7
Total paper and board	269,403	267,247	+ 0.8	2,929,867	3,047,305	- 3.9
Apparent Consumption						
Packaging paper and board	n. a.	n. a.	n. a.	3,420,621	3,339,325	+ 2.4
Corrugated case materials	214,265	213,870	+ 0.2	2,247,014	2,255,755	- 0.4
Kraftliner and SC Fluting	30,878	33,010	- 6.5	365,683	362,322	+ 0.9
Recycled Fluting	81,772	74,915	+ 9.2	779,089	801,307	- 2.8
Testliner	101,615	105,945	- 4.1	1,102,242	1,092,127	+ 0.9
Cartonboard and other board for packaging	n. a.	n. a.	n. a.	932,933	895,102	+ 4.2
Packaging papers	n. a.	n. a.	n. a.	240,673	188,468	+ 27.7
Parent reels of tissue	92,011	88,325	+ 4.2	1,011,804	1,029,746	- 1.7
Printings and writings	n. a.	n. a.	n. a.	1,128,661	1,272,433	- 11.3
Uncoated mechanical	n. a.	n. a.	n. a.	172,463	185,435	- 7.0
Uncoated woodfree	n. a.	n. a.	n. a.	458,443	541,248	- 15.3
Coated mechanical	n. a.	n. a.	n. a.	281,503	287,942	- 2.2
Coated woodfree	n. a.	n. a.	n. a.	216,251	257,808	- 16.1
Other papers and boards	n. a.	n. a.	n. a.	525,300	561,313	- 6.4
Total paper and board	n. a.	n. a.	n. a.	6,086,386	6,202,817	- 1.9
Exports						
Corrugated case materials	8,411	10,707	- 21.4	122,001	136,372	- 10.5
Recycled Fluting	2,245	4,768	- 52.9	41,197	59,420	- 30.7
Testliner	6,166	5,939	+ 3.8	80,804	76,952	+ 5.0
Other papers and boards, incl. printing and writing paper	47,235	49,975	- 5.5	546,171	547,671	- 0.3
Total paper and board	55,646	60,682	- 8.3	668,172	684,043	- 2.3
Imports						
Corrugated case materials	102,658	101,043	+ 1.6	1,085,262	1,058,027	+ 2.6
Kraftliner and SC Fluting	30,878	33,010	- 6.5	365,683	362,322	+ 0.9
Recycled Fluting	25,306	16,882	+ 49.9	198,603	199,209	- 0.3
Testliner	46,474	51,151	- 9.1	520,976	496,496	+ 4.9
Parent reels of tissue	32,821	33,397	- 1.7	370,381	367,932	+ 0.7
Other papers and boards, incl. printing and writing paper	268,760	231,406	+ 16.1	2,369,047	2,413,596	- 1.8
Total paper and board	404,239	365,846	+ 10.5	3,824,690	3,839,555	- 0.4
Fibre						
Woodpulp mill usage						

Sulphate Bleached Softwood	23,242	24,089	- 3.5	261,000	284,770	- 8.5
Sulphate Bleached Hardwood	33,688	25,034	+ 34.6	352,803	323,229	+ 9.1
Other grades of woodpulp	16,695	17,594	- 5.1	197,412	200,007	- 1.3
Woodpulp imports						
Sulphate Bleached Softwood	13,437	15,148	- 11.3	215,565	221,178	- 2.5
Sulphate Bleached Hardwood	42,852	36,418	+ 17.7	395,850	405,852	- 2.5
Other grades of woodpulp	1,729	1,994	- 13.3	27,388	23,225	+ 17.9
Recovered paper						
Mill usage	206,798	208,549	- 0.8	2,287,796	2,424,779	- 5.6
Collection	578,583	507,688	+ 14.0	5,845,530	5,788,752	+ 1.0

Source: CPI

Government offers financial support to Fibre Excellence

 **EUWID +** 03 March 2026 | Valeria Buß | ⌚ ~ 2 min | Published in issue 10/2026

The French government has offered financial support to financially troubled pulp producer Fibre Excellence. French Minister Delegate for Industry Sébastien Martin announced on social media that the state is prepared to support the company with €150m. According to local media reports, the rescue package is divided into two equal tranches of €75m each and includes both financial relief measures and state guarantees to secure the company's industrial plan.



The French government has offered state aid to Fibre Excellence who is threatened by insolvency

"The conditions for a solution are in place; now the shareholder must fully commit to it," the minister was quoted by the French news service *Franceinfo*. Fibre Excellence's shareholder is Indonesian entrepreneur Jackson Wijaya.

Fibre Excellence confirmed that it had received a proposal for a business support plan from government representatives. The company said on 2 March it would review the proposal in the coming days and examine its immediate as well as medium- and long-term implications.

However, the pulp producer also stated that talks on wood supply and electricity feed-in tariffs would have to continue. "These issues are [...] of crucial importance to our operations," the company said.

A few weeks ago, Fibre Excellence – the only market pulp producer in France – had raised the alarm over its critical financial situation. The company is threatened by insolvency if no swift solution to its problems is found. Fibre Excellence particularly criticises the state-regulated feed-in tariffs for self-generated electricity as being too low. The issue is closely linked to problematic wood supply. Industrial wood has become significantly more expensive, which has also driven up energy production costs, the company says, adding that the electricity feed-in tariff therefore needs to be adjusted urgently.

Fibre Excellence operates two pulp mills in France. The Saint-Gaudens mill produces bleached softwood and hardwood kraft pulp with a capacity of 280,000 tpy. The Provence mill in Tarascon has a capacity of 220,000 tpy of unbleached softwood kraft pulp.

Search for investors launched for Papierfabrik Hainsberg

 **EUWID +** 03 March 2026 | [Alexander Ungemach](#) |  ~ 1 min | [Published in issue 10/2026](#)

The provisional insolvency administrator has initiated a structured investor process for Papierfabrik Hainsberg in Germany, which has once again run into financial difficulties. The aim is to find a buyer for the long-established site and to explore the possibility of resuming production.



© GAllegre - stock.adobe.com | 108138048

Papierfabrik Hainsberg had already suspended production in January 2026.

All options for continuing operations are currently being examined, the provisional insolvency administration confirmed in response to an enquiry from EUWID. However, production is presently at a standstill and existing customer orders cannot be fulfilled.

The recycled paper producer had already decided to halt production at the end of January 2026 – [prior to filing for insolvency](#).

According to the insolvency administration, the investor process has so far developed in a constructive manner. Several interested parties have reviewed company documents. It cannot therefore be ruled out that an investor willing to take over the site will be found.

At the same time, the insolvency administration pointed to the challenging environment: Germany's paper industry is undergoing a profound structural crisis. Nevertheless, all available options are to be explored in order to preserve and continue the company, if possible.

UK recovered paper market mostly steady as pressure builds on deinking grades

Deep sea exports subdued during Ramadan and Chinese New Year

 **EUWID** + 02 March 2026 | [Frauke Schmidt](#) | ⌚ ~ 3 min | [Published in issue 10/2026](#)



Pricing on the UK recovered paper market was stable

Demand in the UK recovered paper market was broadly stable in February. While trading activity in Europe and the UK was described as calm, business with Turkey and South East Asia was good ahead of Ramadan and the Chinese New Year period, but then quieted down. Prices largely remained unchanged. Mass recovered paper

grades for packaging papers showed an upward tendency, whereas prices for medium and higher grades were mostly stable, while coming under increasing pressure.

Paper mills in the UK and the EU continue to operate with relatively weak order books, and attempts to lift containerboard prices in February have failed.

Recovered paper inventories at mills are reportedly high, as buyers had prepared for a potential price rally similar to last year. One market participant estimated current fibre demand to be around 30 per cent lower than at this time last year, with a UK packaging paper mill reportedly announcing downtime for March.

Export shipments to Turkey, India and South-East Asia remained at customary levels. Prices moved upwards, but the rise was more moderate than initially anticipated.

Collection volumes in the UK declined noticeably by mid-February once the last "Christmas volumes" had been processed, and the January post-holiday bump had declined year-on-year.

While last winter was exceptionally dry in the UK, rainfall this winter has returned to more typical levels, resulting in renewed quality-related claims due to higher moisture contents. While some collectors managed to negotiate higher moisture tolerances, others complained that paper mills – particularly in some export markets – occasionally use moisture as a pretext for "significant unfounded" price reductions.

Prices for lower packaging grades, including mixed paper (1.02) and OCC (1.05), remained stable in February and even edged up slightly in some Asian export transactions. Most market participants expect largely unchanged prices in March. However, some also believe in a slight uptick in prices as South-East Asian and Turkish buyers might want to replenish their stocks after Chinese New Year and Ramadan is over, while European paper mills could focus on supply security over Easter.

EUWID Price Watch Recovered Paper UK				
February 2026				
Prices in £ per tonne	Feb 2026	Feb 2026	Jan 2026	Feb 2025
		€*	£	£
Mixed paper and board (1.02)	45 - 60	51 - 68	45 - 60	35 - 55
Mixed paper and board (1.02), export	55 - 68	63 - 78	55 - 68	45 - 70
Old corrugated containers (1.05)	77 - 87	88 - 99	75 - 85	85 - 95
Old corrugated containers (1.05), export	82 - 95	93 - 108	75 - 88	97 - 107
Magazines (1.06) ¹⁾	90 - 120	103 - 137	90 - 120	95 - 140
Sorted graphic paper for deinking (1.11) ¹⁾	80 - 95	91 - 108	80 - 95	85 - 110
Newspapers (2.01) ¹⁾	95 - 110	108 - 125	95 - 110	95 - 130
Sorted office paper (2.05)	115 - 130	131 - 148	115 - 132	160 - 168
White woodfree letters (3.05) ²⁾	250 - 270	285 - 308	250 - 270	-
Multigrade	130 - 160	148 - 182	135 - 160	150 - 170
White newsprint (3.14)	170 - 200	194 - 228	170 - 200	180 - 200
White woodfree uncoated shavings (3.18.01)	280 - 345	319 - 393	280 - 345	350 - 380
* Exchange rate as of 27 February 2026: £1 = €1.14		Prices ex works, material sorted and in bale		
¹⁾ includes exports and non-paper applications				
²⁾ From January 2026 onwards, the grade White woodfree letters (3.05) will be additionally covered by EUWID.				
© 2026 EUWID Europäischer Wirtschaftsdienst GmbH		EUWID assumes no liability for the accuracy of pricing information.		
All rights reserved				

Major converter announces significant prices decreases for deinking grades in March

The situation is tenser for deinking grades. Although prices for 1.11, 1.06 and 2.01 remained stable in February, a major paper mill has announced a £15/t reduction for March deliveries, citing declining prices for finished reels. Market reactions have so far been cautious. Some collectors argue that cost increases justify a price delta of up to £40/t between sorted graphic paper for deinking and mixed paper. One source warned that sharp price cuts could lead companies to stop sorting this grade, as doing so would no longer be economically viable. If prices came down, the reduction would be smaller than the £15 that paper manufacturers were seeking to achieve, another market player said.

In the segment for woodfree recovered paper, demand and prices were also described as largely stable, with only few reports of higher selling prices to packaging paper mills. Some market participants believe the market may have bottomed out and see scope for modest increases in March and April. Additional demand is expected from the start-up of the Unifibres complex at Essity's Prudhoe site in March, and seasonal lower collection volumes in early summer may further tighten supply, so some converters are expected to increase their recovered paper stocks ahead of this. Attention is also focused on Northwood's planned restart of the former KC Flint mill, which Northwood has purchased.

Demand for pulp substitution grades still seems to be slow, with only few players reporting slightly higher interest from buyers, pointing to recent increases in pulp prices.

UK recovered paper exports			
tonnes	January - November		% Change
	2025	2024	
Total EU 27	742,481	790,781	- 6.1
France	130,715	141,792	- 7.8
Germany	212,299	253,257	- 16.2
Netherlands	257,029	270,370	- 4.9
Total other Europe	343,732	348,295	- 1.3
Turkey	342,610	347,036	- 1.3
Total Asia	2,553,772	2,323,310	+ 9.9
China	883	2,350	- 62.4
India	1,250,953	834,034	+ 50.0
Indonesia	232,401	243,846	- 4.7
Malaysia	490,708	535,496	- 8.4
Thailand	228,456	161,751	+ 41.2
Vietnam	320,911	506,738	- 36.7
Total South America	317	415	- 23.6
Total Africa	52	395	- 86.8
Total North America	64	17	+ 270.4
Total Australasia	510	1,223	- 58.3
Total Exports	3,640,928	3,464,436	+ 5.1
Source: CPI			

Slovenia's paper manufacturer Vipap Videm enters bankruptcy proceedings

27 February 2026 | [Igor Dugandžić](#) | 🕒 ~ 1 min | [Published in issue 10/2026](#)

Bankruptcy proceedings against Vipap Videm Krško were initiated on 25 February. The company's creditors are requested to submit their claims by 25 May.



Slovenia's publication and flexible packaging paper manufacturer Vipap Videm Krško is insolvent, once again. The District Court in Krško initiated bankruptcy proceedings against Slovenia's only newsprint mill Vipap Videm on 25 February and appointed Sara Pušenjak Petek as the bankruptcy administrator, according to a publication on Slovenia's business register Ajpes.

Vipap Videm is an integrated pulp and paper mill with two paper machines at the site in Krško. The company's product portfolio includes newsprint, coated magazine paper, flexible packaging and wrapping paper, and recycled kraft papers.

According to the Slovenian Press Agency (STA) Vipap had already halted production in mid-December due to a lack of funds and temporarily laid-off the majority of its employees. The production downtime was originally meant to last until the end of January.

UK government to bridge pEPR Year 1 shortfall with no invoice increases

25 February 2026 | [Frauke Schmidt](#) | 🕒 ~ 2 min | Published in issue 10/2026

The UK government will ensure packaging Extended Producer Responsibility (pEPR) Year 1 disposal fees remain unchanged, confirming that producers will not face retrospective fee increases linked to recalculations arising from revised packaging data submissions. The scheme's funding shortfall will be met by government support on a one-off basis to safeguard local authority funding commitments and maintain regulatory stability in the first year of operation.



EXTENDED PRODUCER
RESPONSIBILITY (EPR)

bad studio - stock.adobe.com 427435378

The UK Government will step in to close EPR funding gap in year 1 of implementation

PackUK, the four-nation pEPR scheme administrator acting on behalf of the Department for Environment, Food & Rural Affairs (Defra), identified a funding gap caused by lower overall packaging tonnages reported by producers in corrected and resubmitted data.

Because base fees are calculated by dividing the total cost of household waste management by total packaging tonnage placed on the market, a reduction in reported tonnages - without a corresponding reduction in costs - would typically have necessitated recalculation of per-tonne fees and potentially higher charges to producers. This has triggered [sharp criticism from industry representatives](#), with calls for a fundamental reset of the system's implementation.

PackUK announced on 24 February that there will be no change to Year 1 disposal fees as outlined in producers' Notices of Liability (NoLs) issued in October 2025 as the UK government has agreed to cover the shortfall for Year 1, ensuring that local authorities will receive the expected level of funding for recycling and waste management services without imposing additional costs on producers.

The government and PackUK emphasise that the funding secured through pEPR, cited at approximately £1.4bn for 2025/26, remains in place to support local authority services, including household recycling and waste management infrastructure.

Looking ahead, the scheme will move to [eco-modulated fees](#) from Year 2 (2026/27), reflecting packaging recyclability under the Recyclability Assessment Methodology (RAM). Producers can expect greater differentiation of fee rates based on material and design performance, a cornerstone of the UK's broader packaging circular economy reforms.

Sappi announces price increases for its coated reels

24 February 2026 | 🕒 ~ 1 min | [Published in issue 10/2026](#)

Sappi today announced prices increases across two key product groups, effective 16 March 2026.

Prices for mechanical coated reels are to rise by €40/t and woodfree coated reels prices by €50/t. The adjustments

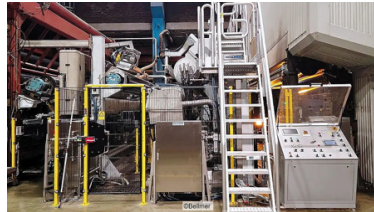
follow a long period of significant pressure on prices, combined with structurally elevated costs, the company says. They follow its previous announcement for woodfree coated sheets prices and form the first step in restoring sustainable market pricing, Sappi explains, stating that further increases may be required should cost levels remain elevated and market pricing fail to recover.



Bellmer modernises PM at Smurfit Westrock's Piteå mill

 **EUWID +** 23 February 2026 | [Konstantin Stoll](#) |  ~ 1 min | [Published in issue 10/2026](#)

Smurfit Westrock is pressing ahead with investments at its Swedish kraftliner mill in Piteå, upgrading paper machine PM 2 as part of efforts to enhance product quality and operational performance.



New TurboCalender with fully automatic ropeless threading system installed on PM 2 at Smurfit Westrock's Piteå kraftliner mill to enhance white-top kraftliner quality.

For the project, the company commissioned German technology supplier Bellmer to install a new Turbo Calender and a fully automatic ropeless threading system on the machine used to produce white-top kraftliner. The installation was finalised according to schedule in September 2025.

Bellmer said the fully automatic ropeless threading system ensures reliable sheet transfer from the dryer section through the calender to the pope reel.

With a capacity to produce up to 700,000 tpy of kraftliner and approximately 510 staff, the Piteå mill is the largest kraftliner mill in Europe, Smurfit Westrock says.

The modernised PM 2, with a working width of around 6.65 m and an operating speed of up to 1,300 m/min, produces white-top kraftliner with an annual capacity of up to 330,000 t in basis weights ranging from 125 to 200 g/m².

The site's second paper machine, PM 1, manufactures brown kraftliner in basis weights of up to 300 g/m² with a maximum output of 360,000-380,000 tpy, a spokesperson told EUWID.

