

Production and consumption of paper and board in Cepi countries headed lower in 2025

Turkey tightens import rules on certain paper and board grades

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Europe's paper industry has struggled to get back up to speed in recent years, and last year was no exception. After a very weak 2023, when output tumbled by almost 13 per cent, and a partial rebound in 2024 with growth of around 6 per cent, paper and board production declined again last year.

Preliminary figures from the Confederation of European Paper Industries (Cepi) show that total paper and cartonboard output reached 77.6 million t in 2025, which was 1.5 per cent less than in 2024. At the same time, provisional data indicate that apparent paper and cartonboard consumption in Europe fell by 2.2 per cent compared with 2024. In addition to high energy and manufacturing costs, the industry also struggled with a sluggish economic environment, an expanding regulatory burden and mounting trade tensions in 2025, all of which adversely affected European paper and cartonboard production and consumption, Cepi said.

Graphic paper and cartonboard post significant falls in production

In keeping with the pattern seen in recent years, the two main product groups – graphic paper and packaging paper and board – once again followed different trajectories in 2025. Packaging grades accounted for 63.9 per cent of total output in 2025, while graphic paper continued to lose ground falling to 20.7 per cent.

Across all grades, graphic paper encountered a 7.2 per cent drop in output compared with 2024. Newsprint production declined by 7.5 per cent, while coated magazine paper output fell by 10.8 per cent, and uncoated magazine paper manufacturing was down 10.7 per cent. Woodfree uncoated paper production was 4.7 per cent lower than in 2024, while woodfree coated paper output dropped by 5.5 per cent.

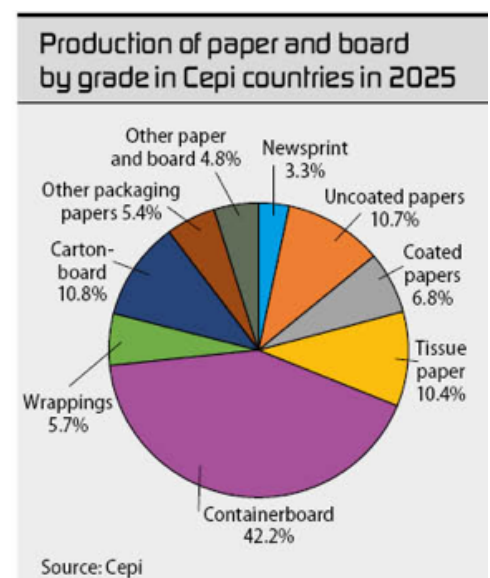
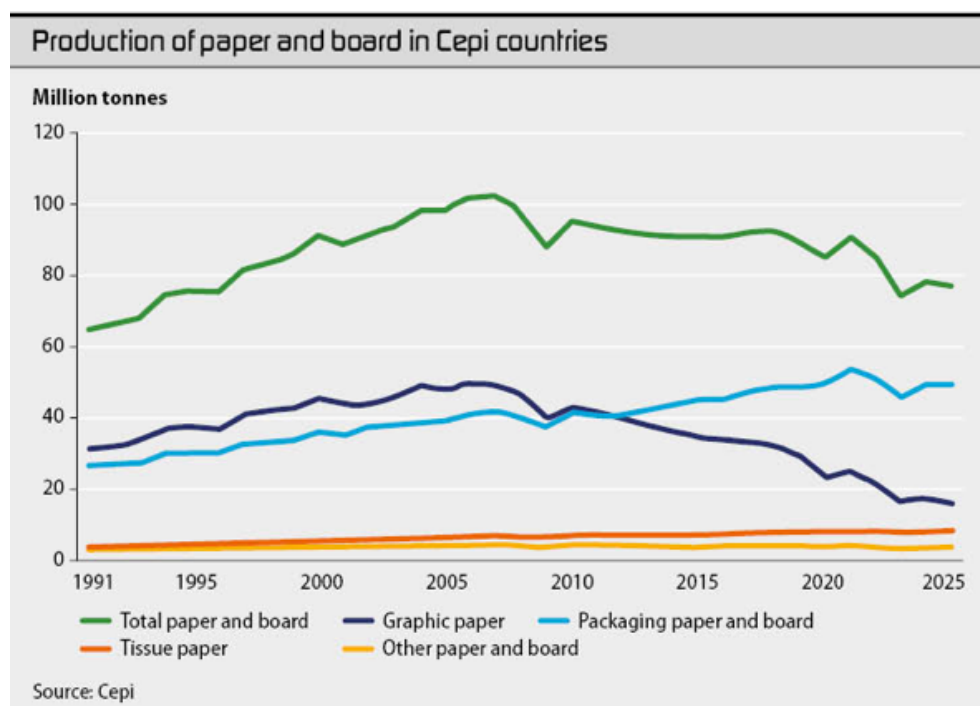
Cepi listed total graphic paper production at 17.4 million t in 2024, comprising 2.7 million t of newsprint and 14.6 million t of printing and writing paper. This meant that graphic paper had a 22.1 per cent share of overall output in 2024.

In the major segment of paper and board for packaging applications, 2025 production was virtually unchanged from the previous year, edging up by 0.1 per cent. However, trends varied among the individual packaging grades: while output of corrugated case material (+1.7 per cent) and wrapping paper (+1.0 per cent) both increased, cartonboard production (-5.6 per cent) fell noticeably.

In 2024, Cepi countries produced 32.4 million t of corrugated case material, 8.8 million t of cartonboard and 4.3 million t of wrapping paper, bringing total packaging paper and board output to 49.6 million t.

Looking at historical trends in packaging paper and board production in Europe, the picture remains broadly positive on the whole, with average annual growth of 1.8 per cent since the early 1990s. However, developments over the past five years have been less encouraging, with last year's output 6.8 per cent lower than the record high recorded in 2021, according to Cepi.

Tissue paper production dipped by 0.8 per cent in a year-on-year comparison. Based on provisional figures, tissue accounted for 10.4 per cent of total production in 2025. By comparison, tissue paper manufacturing reached 8.2 million t, representing a share of 10.5 per cent.



Apparent consumption also headed lower

Paper and board consumption also decreased in the Cepi region last year. Provisional figures based on the first three quarters of 2025 indicate that apparent consumption was a little more than two per cent lower. Cepi stressed that the main factor in this slump was a downturn of almost 8 per cent in graphic paper consumption.

Demand for tissue products also cooled, and ended up almost 2 per cent lower than in 2024.

In the packaging segment, apparent consumption of cartonboard was down 3.5 per cent, while consumption of corrugated case material was only slightly lower than in 2024. Cepi also reported a small growth of 0.5 per cent for wrapping paper.

Market pulp production climbs as recovered fibre use falls again

Based on preliminary figures, market pulp production grew by 2.1 per cent year-on-year. Cepi reported that the European industry had reaped the rewards of a somewhat more stable market climate in 2025.

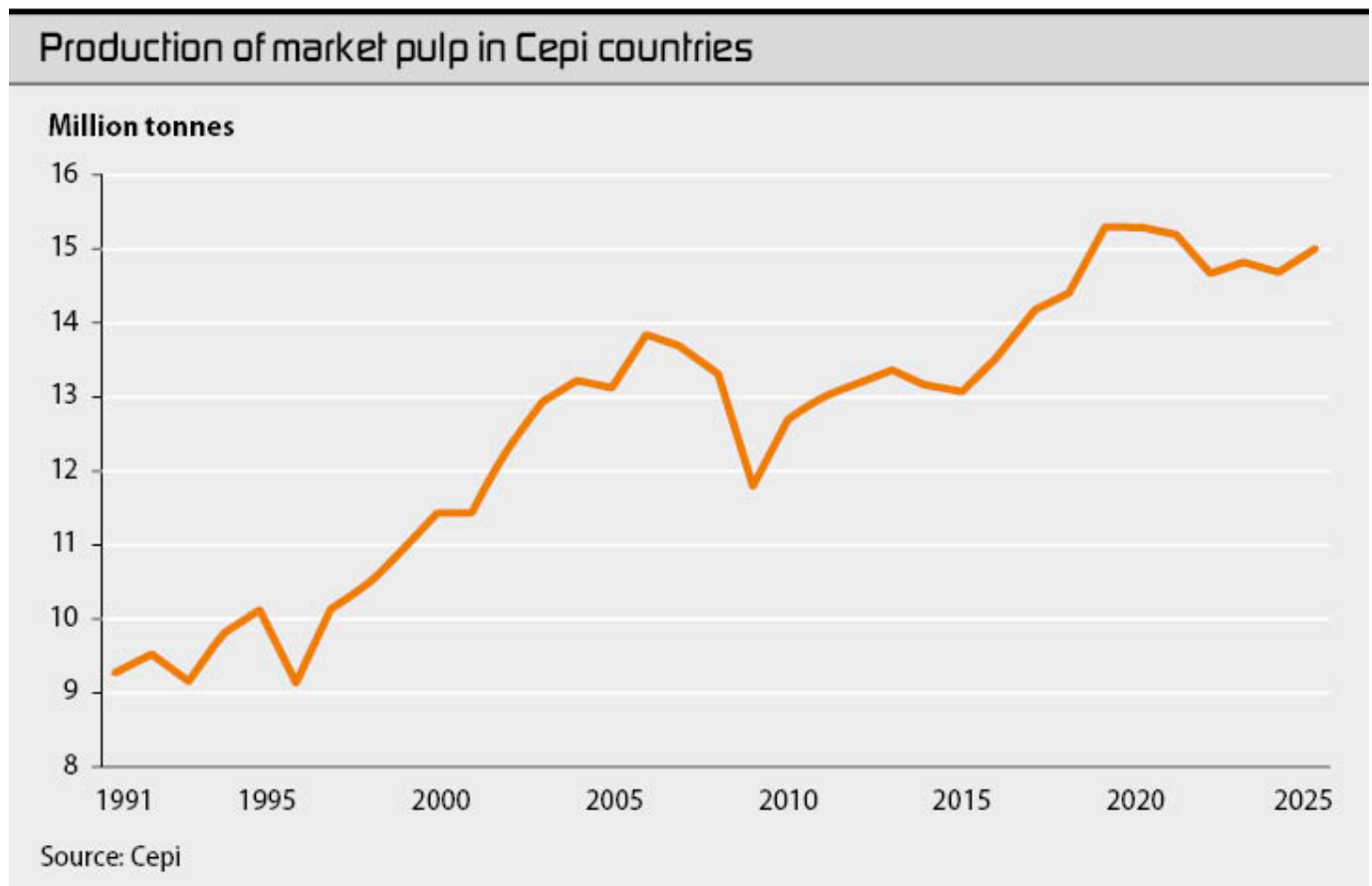
By contrast, market pulp consumption in Cepi countries decreased by 4.1 per cent year on year, based on an analysis of provisional figures. Cepi stated that additional volumes from higher market pulp production had gone to export markets, where shipments increased by almost 18 per cent.

In 2024, Cepi members manufactured roughly 14.7 million t of market pulp. Exports stood at 6.4 million t, while apparent consumption reached 16.5 million t.

Total pulp production dipped by 1.2 per cent in 2025 to 33.3 million t. While chemical pulp production increased slightly by 0.7 per cent compared with 2024, output of mechanical pulp dropped by 8.1 per cent.

By contrast, the use of recovered paper to make paper and cartonboard declined slightly in Europe last year. Cepi reported a 1.3 per cent slide after a limited recovery in 2024 and dwindling use in the two previous years. The association put the total amount used in 2024 at 46.2 million t, which represented a 4 per cent year-on-year increase at the time.

Cepi said that last year's slump in recovered paper utilisation is largely consistent with dwindling paper and cartonboard production in the areas covered by its statistics. Cepi cited the structural downturn in graphic paper production as the main reason for last year's lower recovered paper use. This was also reflected in demand for individual recovered paper grades in the paper industry: consumption of old newspapers and magazines fell by 16 per cent in 2025, while use of old corrugated containers and kraft grades was 1.7 per cent higher.



Turkey taking a protectionist stance as FTAs expected to send positive signals

Based on figures for the first three quarters of 2025, the European paper and board industry's total deliveries were 1 per cent lower than in the same period a year earlier. Shipments within the Ceper countries were only slightly down, edging 0.3 per cent below the previous year's level. However, exports to markets outside the Ceper area were 4.4 per cent lower.

The sluggish global economy and persistent geopolitical conflicts have made a dent in demand for paper and board made in Europe. Economic uncertainties and new trade barriers have also played a major role, including import tariffs imposed by the US government and safeguard duties introduced by Turkey on imports of recycled corrugated case material.

At the presentation of the provisional statistics in mid-February – before the outbreak of the Iran conflict – Ceper highlighted the prospect of fresh momentum for exports this year from changed trade policy conditions. On the one hand, paper and board exports to the US staged a slight recovery since last autumn, after an EU-US deal was signed in August and a 15 per cent ceiling imposed on tariffs. Pulp and a few other "essential" products are even fully exempt from these tariffs.

On the other hand, the EU has entered into free trade agreements (FTAs) with Indonesia, India and the Mercosur countries since last autumn. These agreements – which cover almost 5 per cent of all EU paper and board exports in 2024 – are expected to contribute towards a further reduction in trade barriers in the years ahead. EU trade deals with Mercosur, India and Indonesia will give positive signals for exports, but implementation must start as soon as possible,” Cepi noted.

Cepi has expressed concern about Turkey’s increasingly protectionist stance, warning that recent trade measures are creating challenges for European pulp and paper producers. The European pulp and paper industry association believes the issue should be addressed at EU level. Turkey, which in 2024 was still the third most important export destination outside the EU with a total volume of 1.36 million t of paper and board, introduced safeguard duties of \$85-87/t on global imports of certain recycled corrugated case materials, including those from the EU, at the end of July 2024 as part of a safeguard investigation. According to Cepi, the expiry review will start in the second half of 2026, potentially leading to the renewal of the safeguard measures in 2027.

Since late last year and into the beginning of this year, Turkey has been examining and, in some cases, already imposing further measures to curb imports of additional paper and board grades. On 31 December 2025, Turkey has initiated a safeguard investigation on the imports of some cartonboard and coated mechanical paper grades, according to Cepi. In addition, Turkey is reported to have introduced a surveillance measure on certain unbleached kraftliner and unbleached kraft sack paper imports from 31 January. Authorities are requiring that duties be levied on the basis of reference prices set at US\$700/t for unbleached kraftliner and US\$1,000/t for unbleached kraft sack paper, Cepi reports.

Germany: production, deliveries and consumption by main grades

January - December 2025

1,000 t	January - December		%
	2025	2024	2025/2024
Paper and board			
Production	18,686	19,174	- 2.5
Deliveries	18,724	19,056	- 1.7
Domestic deliveries	9,153	9,419	- 2.8
Export deliveries	9,571	9,637	- 0.7
Graphic paper			
Production	3,408	4,091	- 16.7
Deliveries	3,436	4,079	- 15.8
Domestic deliveries	1,726	2,080	- 17.0
Export deliveries	1,710	1,999	- 14.5
Paper and board for packaging			
Production	12,536	12,320	+ 1.8
Deliveries	12,508	12,175	+ 2.7
Domestic deliveries	5,360	5,224	+ 2.6
Export deliveries	7,148	6,952	+ 2.8
Sanitary paper (machine production)			
Production	1,346	1,385	- 2.8
Deliveries	1,396	1,431	- 2.5
Domestic deliveries	1,355	1,388	- 2.4
Export deliveries	41	43	- 4.9
Specialty and technical paper and board			
Production	1,396	1,378	+ 1.3
Deliveries	1,384	1,370	+ 1.0
Domestic deliveries	712	728	- 2.1
Export deliveries	672	643	+ 4.5

Source: Die Papierindustrie statistics

Industry associations see only limited impact of the Iran war on energy cost trends so far

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According to the French paper industry association Copacel, there has been little concrete negative impact from the Iran war on companies in the paper industry in France so far at the beginning of the second week of March.

A representative for the association explained that it is still too early for a substantial analysis, but it is clear that the expected problems will not lie in the sufficient supply of oil and gas, but primarily in their price development. Price increases for crude oil and natural gas have been limited so far, and some companies in the industry have made investments in recent years since the energy crisis to become less dependent on fossil fuels, for example by building biomass power plants. However, a change and intensification of the situation is possible at any time, and further changes in the energy cost situation can happen very quickly, the representative said. Companies are also potentially affected very differently depending on their ability to generate their own energy.

Italian business association Unimpresa, which represents small and medium-sized enterprises, has also weighed in with its assessment of the issues arising from the Iran conflict regarding the supply of crude oil and natural gas, price developments and the associated risks for the economy. According to its own analyses, compiled in the first week of March, a conflict in Iran limited to three to four weeks would lead to a temporary rise in energy prices, but without causing a “structural shock” to the Italian economy.

The crux of the problem is the Strait of Hormuz, through which around 20 per cent of global trade in crude oil and liquefied natural gas is transported. Without a prolonged naval blockade, Unimpresa forecasts that any price increase would be mainly related to risk premiums and less to an actual interruption of physical flows.

The association's forecasts indicate a temporary peak in oil prices of between \$90 and \$110 per barrel, compared to \$75 before the crisis, explains Unimpresa. For gas, the association's estimates assume an increase in the TTF price to €50 to €65/MWh. Italy, which consumes around 70 billion cubic metres of gas annually, would suffer more from price volatility than from an actual supply shortage. At the macroeconomic level, the impact of a short-term conflict would be limited, according to Unimpresa, with an average 30 per cent increase in oil prices over a month affecting inflation by an estimated +0.2-0.4 per centage points compared to a baseline of 2.1 per cent. In this case, the negative impact on GDP would be a reduction of 0.2 percentage points from the baseline scenario of +1.1 per cent.

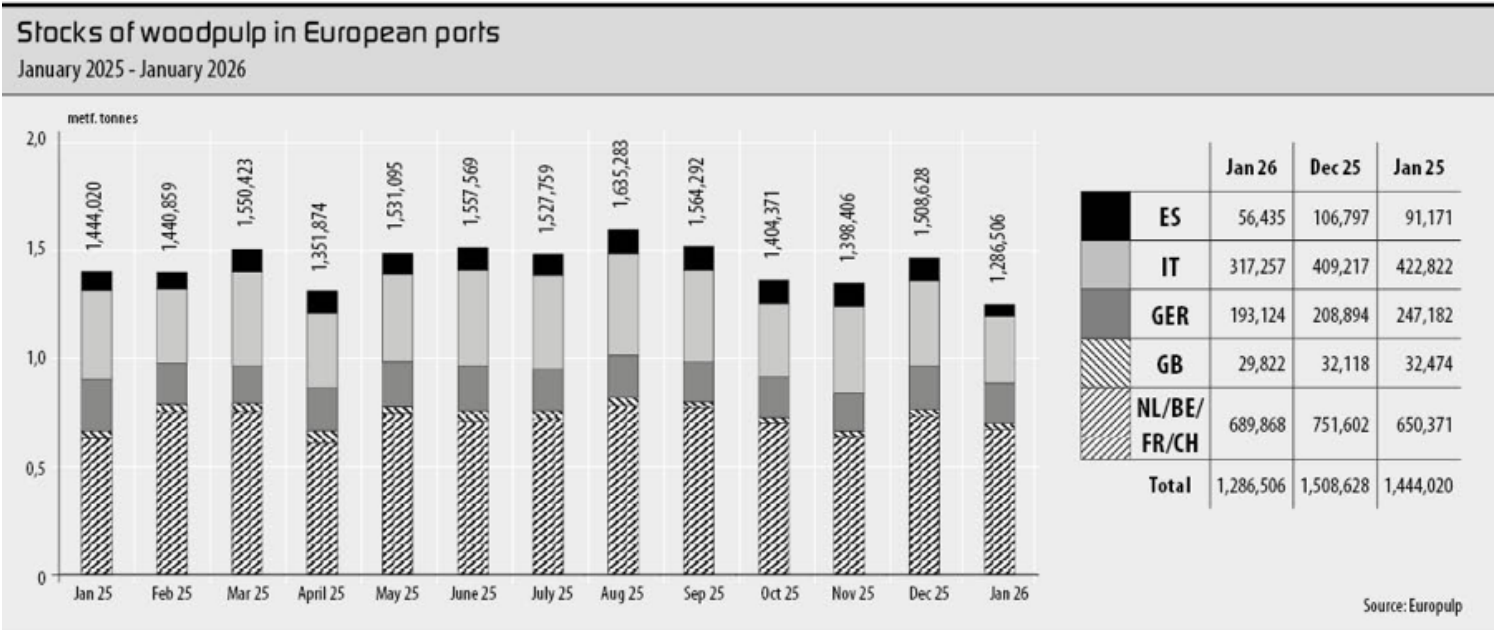
European pulp ports stocks markedly down in January

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The inventories of wood pulp held at European ports decreased considerably in the first month of this year. Total pulp port stocks in January 2026 amounted to 1.29 million t, reports Europulp. This was around 15 per cent below the level of December 2025 and approximately 11 per cent lower than in the same month of the previous year.

On a regional level, the trend looked very similar, with declines recorded everywhere compared to December. In the larger region Netherlands/Belgium/France/Switzerland, wood pulp inventories decreased by around 8 per cent to 690,000 t compared to December. Germany also reported a decline of about 8 per cent to 193,000 t.

The downtrend in southern Europe was even more pronounced: Italy saw a roughly 23 per cent month-on-month drop to 317,000 t, while Spain's stocks plunged by around 47 per cent to 56,000 t, according to Europulp.



Stora Enso presents management for new forest asset company

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Stora Enso has presented the executive management team for its planned demerged forest asset company. Tuomas Hallenberg, who previously served as Executive Vice President for Stora Enso's Forest division, was appointed CEO of the new company in November last year and has held the position since January 2026.

The other members of the new company are Martin Ros as CFO, most recently Senior Vice President Strategy and Finance in Stora Enso's Biomaterials Business Area, Johan Djurberg as Head of Forestry, currently Vice President Wood Supply at Billerud, and Pontus Selderman as General Counsel, currently Senior Vice President Forest Legal and ESG Regulatory at Stora Enso.

Stora Enso had announced in November last year that it planned to spin off its forestry operations into a separate company. The demerger is expected to be completed in the first half of 2027.

Price upswing for BEK and NBSK pulp continues in Europe in February

War in Iran creates uncertainty but limited impact on market so far

 11 March 2026 |  ~ 6 min | [Published in issue 11/2026](#)

The European pulp market continued its upward trajectory in February. Prices for bleached hardwood kraft (BHK) pulp once again saw relatively dynamic increases. Quotes for northern bleached softwood kraft (NBSK) pulp also ticked higher, but at a slower pace and facing much more resistance in the market.

EUWID Price Watch Pulp Western Europe			
February 2026			
CF European pulp	February 2026 ¹	January 2026	February 2025
Bleached softwood pulp			
Softwood kraft			
From Scandinavia and Canada in 40%	1,528 - 1,421	1,382	1,489 - 1,429
From Scandinavia and Canada in 50%	1,499 - 1,493	1,359	1,519 - 1,399
Southern softwood from the US in 40%	1,527 - 1,395	1,252 - 1,249	1,383 - 1,391
Southern softwood from the US in 50%	1,546 - 1,393	1,499 - 1,399	1,499 - 1,399
Bleached hardwood pulp			
Bleached hardwood from Scandinavia in 40%	1,577 - 1,393	1,555 - 1,553	1,569
European pulp			
From Portugal/Spain in 40%	1,577 - 1,393	1,555 - 1,553	1,569
From South America in 40%	1,577 - 1,393	1,555 - 1,553	1,569
From South America in 50%	1,239 - 1,249	1,239 - 1,249	1,349
Southern hardwood in 40%	1,584 - 1,589	989 - 1,577	1,573
Southern hardwood in 50%	1,239 - 1,249	1,239 - 1,249	1,349
Hardwood B2 T80			
From Scandinavia and Canada in 40%	517 - 525	479 - 487	562 - 593
From Scandinavia and Canada in 50%	499 - 499	479 - 487	499 - 443
¹ Exchange rate as of 1 March 2026 (USD = 48.86)			
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At the same time, the war in Iran is creating additional uncertainty in the market. “We cannot say yet what will happen, but there will definitely be effects,” commented one market participant at the end of the first week in March. EUWID respondent believes the risk has less to do with contracting pulp demand from the Middle East countries, which is generally relatively low, but rather with the region’s function as a transshipping hub for deliveries to Asia. A different player said the Iran war could make trade with Asian markets more complex and expensive. Shipping companies have halted transports to the Middle East or announced surcharges. If some of the shipments cannot be carried out as planned, those volumes will have to be redirected to other markets in the short term, players believe.

Simultaneously, however, the pulp producers surveyed by EUWID stress that their own supply chains have been barely affected so far. For Europe, the current status is described as “business as usual.”

Several industry representatives expect the conflict to be mainly noticeable in the form of rising energy and logistics costs, which will act as a drag on the already sluggish economy. Prices for oil and gas have already risen since the beginning of the escalation. In particular, paper mills, which are highly dependent on natural gas as a source of energy, could therefore be facing rising production costs, insiders say.

Paper producers already describe their economic situation as tense. “Every additional dollar is extremely painful for us right now,” said one papermaker. European paper companies are currently trying to lift their own prices, but even if they are successful, this would only cover part of the cost increases and would not improve the insufficient profitability, EUWID was told. Pulp buyers are therefore sceptical about the prospect of a new, long-term upward cycle in the pulp market. Given the geopolitical uncertainties

surrounding the war in Iran, it is now very difficult to predict future developments, insiders say.

BEK producers implement price hikes and demand another \$50

Producers of bleached eucalyptus kraft (BEK) pulp were able to implement price hikes in February. After a mark-up of \$30 in December and a hefty increase of \$120 in January, the monthly prices rose again by around \$30 in February. Market participants say the current BEK pulp list prices in Europe are now as much as \$1,280/t. For March, several suppliers have announced another hike of around \$50, as they are looking to bring list prices up to \$1,330/t.

Several respondents believe a further upward price step is likely, though it will be driven less by demand and more by supply-side factors. Inventories at the ports have fallen recently and some producers had started off the year with relatively low available volumes. Lead times have become significantly longer now and are said to stretch to around 10 weeks in some cases.

The factors restricting supply in Europe include logistics problems at ports as a result of winter storms in Portugal as well as strikes at Ence in Spain. Industry insiders also mentioned that shipments from South America were delayed. "Everyone is ordering more than they have under contract," said one supplier. Market supply is generally not scarce but the market is nevertheless tight, according to one insider.

Sellers say BEK pulp prices on the Chinese market rose further in February. According to market information, net prices for hardwood pulp in China are currently around \$600/t. At \$10, the increases were moderate. For March, a few suppliers have announced further price hikes, typically of around \$20/t. Insiders say, however, that there has not been much response yet from buyers. Many observers are waiting for the outcome of the talks during the upcoming Shanghai Pulp Week, which are said to provide clarity on whether the new demands can be implemented or not. Several suppliers stress that European prices must keep pace with those in China. This is also the main argument used to support the latest announcements of price increases in Europe.

However, converters in Europe note in this context that different markets can develop differently: Even if higher prices are being paid in Asia, producers are not able to divert 100 per cent of their volumes in that direction, especially now with the logistics problems due to the war in Iran.

Some market participants expect that the current price uplift for hardwood pulp in Europe could continue in the coming weeks. A few believe local prices could peak at around \$1,330/t, after which the market might stabilise. However, future pricing will largely depend on the development of the Chinese market and the war in Iran, respondents say.

NBSK pulp producers continue to struggle with weak demand

Prices of softwood pulp are also rising, but the process is more arduous. Most recently, producers announced list prices of \$1,710 and \$1,730/t and say they are currently negotiating these demands with their customers, to take effect for March deliveries. Some market watchers believe these targets are very ambitious. According to respondents, the realised price level in February was often around \$1,600-1,650/t. This means the gross prices may be moving upwards, but the net prices remain still below the level paid in

the fourth quarter of 2025. This said, industry representatives believe that the path towards list prices above the \$1,700/t mark will require a few months and several rounds of negotiation. "I doubt we can achieve the \$100 price hike in one step," commented one respondent.

Many producers of NBSK pulp continue to struggle with a tough financial situation. Recently published annual reports clearly show that hefty losses were recorded in the market pulp segment in 2025. The increase in annual discounts at the beginning of the year has further intensified the situation. And the structural pressure in the softwood pulp market persists. Demand remains weak and impetus from the paper industry is nowhere to be seen. At the same time, the significant price difference to hardwood pulp continues to drive substitution processes. In China, too, many observers are not seeing any substantial uptick in demand despite the end of the Chinese New Year holidays.

The European spot market remains active. EUWID sources say NBSK volumes are available outside of contracts and prices here have picked up slightly. The especially aggressive offers that existed at times last year are barely being seen now.

Given the unsatisfactory market situation, some NBSK pulp producers continue to adjust their production. Metsä Fibre announced it would temporarily halt production at its Joutseno mill as of 31 March. Industry representatives say this step will be generally supportive for the market, but much more is needed to shift the balance between supply and demand.

In France, there are also cutbacks in the production of softwood pulp. The financially troubled pulp producer Fibre Excellence is idling its Provence unbleached kraft pulp mill in Tarascon from 2 until 15 March. The company explained that the downtime is happening against the backdrop of persistent tensions in the industrial timber market.

Producers contemplating further hikes in the German market amid surging energy prices

Sentiment in the recycled CCM market changing swiftly

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In early March, it appears producers are having some success with the implementation of their targeted price hike for recycled corrugated case material (CCM) in Germany. However, the war in Iran and the escalating Middle East crisis could necessitate further steps in the near future, they say. One early announcement of another price hike is reportedly already circulating in the market. An upward price step is also being mooted for recycled cartonboard, but this market is not as uniform. While some cartonboard producers intend to react soon, others want to wait and see.

Geopolitical situation could necessitate prompt action in the CCM market

Since 20 February, events have been unfolding quickly on the market for recycled CCM in Germany. Some of the effects already occurred in the EUWID survey conducted in the first week of March, others were still just rumours against the backdrop of the tumultuous geopolitical situation. However, respondents in the market say that the price hikes targeted by the industry at the beginning of March do not account for the potential impact of the Iran war on energy costs.

After the failure to implement the announced February price hikes for brown recycled CCM, paper mills made a fresh attempt as of March. However, at the time the market surveys were conducted in late February and early March, it was already becoming apparent that sellers were retreating from their original targeted amounts in the new price round. In mid-February, the announcements had contained asking price hikes of around €100/t. By the end of the third week in February, most of the new demands were usually centered around €80/t, effective from 1 March, according to insiders from both sides of the market. In the early stages of the talks, players appeared to be focusing on a price increase of €40-60/t for deliveries of recycled CCM as of March. Within three days, this amount changed to €40/t. EUWID respondents confirm that even in signed deals, the mark-ups were revised from €60/t to €40/t. The market development in Poland reportedly had a decisive impact on pricing in the German market.

At the end of the first full week in March, EUWID heard unconfirmed rumours about potential further demands of up to €100/t, effective either immediately, or as of 15 March or 1 April. At the same time, some converters criticised that paper mills ought to have learned a lesson after the war in Ukraine that spot deals should only be one part of their energy sourcing structures.

One reason for the more successful implementation of the €40/t step as of 1 March was that far more paper producers were on

board this time, according to market insiders. Representatives from both the paper industry and the corrugated board sector believe one of the main reasons why the February price round failed was that not all relevant industry players were pursuing the same pricing plans and a few chose to wait on the sidelines.

In March, some German paper mills say they now have decent capacity utilisation on their machines. This is due partly but not exclusively to inventory effects, as buyers try to order additional last-minute volumes in anticipation of rising prices. Players in the corrugated board industry also express satisfaction with their volumes and report fairly good activity levels.

So far, the agreed mark-ups apply only to brown recycled CCM grades. Since the end of January, there have been parallel demands in the white-top testliner segment – but these were not adopted by the majority of suppliers here.

Will surging energy costs lead to calls for mark-ups for cartonboard?

Initial market talks in early March suggested stable prices for folding cartons and cartonboard in Germany. Producers of recycled board are keeping an eye on the corrugated market, where producers were able to lift prices for brown recycled CCM as of 1 March even without a corresponding rise in recovered paper prices. Such a step is also needed in the cartonboard market, they say, but by the end of the first week of March, there had not been any announcements to this effect.

However, towards the end of the first week of March, the picture had changed as a result of the Iran war. The effects of the escalating conflict in the region could necessitate price adjustments in the near future, insiders say. However, industry experts expressed varying views: Some players said energy supply was hedged and they purchased very little on spot markets, which enabled them to wait and see what happens without panicking. However, if the conflict in Iran and the Middle East region lasts longer than two weeks, price increases would be necessary, they said. Other players were quicker to react and said they were preparing customers for necessary hikes for recycled board. It is not yet clear what the targeted amount might be.

There are many half-year contracts on the German market for primary fibre-based board and converters who have signed these are unwilling to enter into price negotiations before these deals expire. In quarterly contracts in Germany, however, it also appears that prices are poised to move sideways, as converters say they have not heard any talk of increases from producers.

The German market for unlined chipboard (greyboard) remains difficult to assess. Some companies are taking advantage of the rumors surrounding a market participant, resulting in volumes being transferred to other producers. The latter players therefore have better-than-expected capacity utilisation, but this does not represent a real upswing, they say.

No major problems anticipated in outflow of available woodchips and sawdust in March

Contracts expiring end of February extended until end of Q1 at stable prices

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After frequently extended stoppages at the turn of the year and further downtime in January and the first half of February 2026 as well, production activity in the Central European sawmilling industry has picked up again to some extent in the past few weeks.

EUWID Price Watch Sawmill Residues Germany					
March 2026					
€/loose m³	5 Mar 2026	22 Jan 2026	27 Nov 2025	13 Mar 2025	% change 2025/2024
Southern Germany					
Woodchips*	20.50 - 23.50	20.50 - 23.50	19.50 - 21.50	16.50 - 19.50	+ 22.2
Sawdust*	23.00 - 25.00	23.00 - 25.00	20.00 - 22.00	16.00 - 18.00	+ 41.2
Northern/Western Germany					
Woodchips*	20.00 - 23.50	20.00 - 23.50	20.00 - 22.00	18.00 - 21.00	+ 11.5
Sawdust*	21.50 - 25.50	21.50 - 25.50	21.00 - 22.50	17.50 - 19.50	+ 27.0
Eastern Germany					
Woodchips*	20.50 - 22.50	20.50 - 22.50	19.50 - 21.00	17.00 - 20.00	+ 16.2
Sawdust*	22.50 - 24.00	22.50 - 24.00	20.00 - 21.00	16.50 - 18.50	+ 32.9
* without bark					
Average prices for sawmill residues sold to industrial clients, ex mill					
EUWID assumes no liability for the accuracy of pricing information					
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Compared with the fourth quarter, roundwood availability improved in various regions, particularly in southern Germany. However, log transports continued to face delays. Initially, snow and frost caused problems, while wet conditions then became the main issue.

Sawmills are struggling even more with the difficult situation on sales markets. Export opportunities have reportedly continued to deteriorate and there is also little momentum on Central European markets. As a result, the pricing situation remains unsatisfactory from producers’ perspective. Sawmills were not able to pass the recent significant increase in roundwood prices on to customers. Sawmilling companies are still endeavouring to compensate for the ensuing deterioration in their earnings position by pushing business in sawmill residues.

Following a minor improvement in production activity in the sawmilling industry, supply of sawmill residues has risen slightly. Some buyers also took downtime or curtailed production and therefore had weaker demand, which freed up additional volumes. The production stoppage at Fibre Excellence’s Provence pulp mill in southern France (see separate article) became an issue particularly in the Germany’s southwest. However, the woodchips volumes previously supplied to the mill in Tarascon have been distributed relatively well, by means of deliveries to German pulp manufacturers and to the insulation industry.

Demand for sawdust continued on a relatively stable note. Although numerous pellet mills’ performance dropped significantly in January and February due to the persisting cold weather and the excessively wet source material, they continued to receive sawmill residues mostly without any restrictions and used them to build up stocks. These stocks are expected to be processed in the coming weeks. Pellets produced continue to be sold reasonably well, although the first downward price adjustments have been

reported. Most pellet plants are expected to maintain relatively high production levels through April, ensuring continued stable purchases of sawmill residues.

In contrast, demand from the wood-based panel industry has been restricted for some time by sales problems in that sector and the ensuing adjustments in output. With the sharp growth in sawdust prices, most particleboard manufacturers increasingly withdrew from business in sawdust and stepped up their use of salvaged wood instead. In the last few months, however, the cold weather has limited supply of salvaged wood and led to even greater demand from the power-station sector. As a result, a few particleboard manufacturers were buying sawdust again.

Thanks to the situation in the customer sectors, the slightly higher availability of sawmill residues is being absorbed largely without disruption so far. Suppliers and buyers expect little change in this situation at least until the end of March or even well into April.

Most sawdust prices stable, with only occasional small declines

Available volumes of sawdust are only being offered in scattered instances, and a taker is generally found relatively quickly. Additional volumes mostly change hands at stable prices, though prices have also been reduced slightly in individual instances. After the increases in contract prices at the start of the year and the subsequent scattered adjustments for deliveries from February onwards, hardly any changes have been made lately. Most contracts that expired in February have been extended into March at stable prices.

In April, processors plan to move even more strongly toward quarterly pricing, although this may prove difficult due to ongoing uncertainties about the future development in the sawdust market. Some buyers, anticipating potential renewed volume pressure in the second quarter, prefer to stick to monthly pricing. For woodchips, however, quarterly contracts are expected to be concluded again.

Negotiations on deliveries from April onwards will probably not commence until relatively late. In view of the improving supply situation, buyers have no reason to start talks too early. The deals might not be finalised until sometime in April. Sawmills are expected to try to at least roll over the prices agreed in the last round of negotiations. A few companies are even planning to push through further increases for woodchips.

Where sawdust is concerned, however, buyers are expected to push for more pronounced downward adjustments. Depending on the baseline, reductions of €2-4/m³ are up for discussion. Buyers are also aiming to get reductions accepted in prices for pulp/MDF woodchips, but the leeway is narrower at €1-3/m³.

European paper mills consume more soft- and hardwood pulp in January

 11 March 2026 | ~ 1 min | [Published in issue 11/2026](#)

European paper mills consumed considerably more pulp in January 2026 than in the preceding month.

According to Utipulp, around 802,000 t of chemical market pulp was used in its member countries. This figure was around 11 per cent higher than in December 2025, but roughly 3 per cent lower than in January 2025. Consumption of bleached hardwood pulp amounted to around 526,000 t, up by about 11 per cent over December 2025. The volume of bleached softwood pulp used was around 218,000 t, also representing a significant uptick of around 10 per cent compared to the preceding month.

Pulp inventories held by paper mills decreased in January. They stood at around 682,000 t, approximately 10 per cent lower than in December and roughly 6 per cent below the level of January 2025. This represented 26 days of production. Stocks of bleached hardwood kraft amounted to 25 days, while inventories of softwood pulp corresponded to 27 days.

Inventories and consumption of pulp consumers in Europe								
January 2026								
tonnes		UNBLEACHED		BLEACHED / SEMI-BLEACHED			Total	Previous year
		Sulphite & Kraft	Softwood sulphite	Hardwood sulphite	Softwood kraft	Hardwood kraft		
Inventories								
December	2025	8,653	22,515	11,739	222,884	493,845	759,636	741,954
January	2026	8,113	28,731	6,010	204,883	433,765	681,502	721,302
Consumption								
December	2025	5,890	29,860	11,881	198,649	476,131	722,411	718,236
January	2026	7,489	31,443	18,669	218,312	526,510	802,423	826,866
NB: Total and previous year total do not include DIP and CTMP, figures are constantly revised.								
Each national Association has to provide an estimation for 100% of the national volumes out of their samples (from 80% to 100% depending on the countries).								
Source: UTIPULP								

Arctic Paper improves energy self-sufficiency at Grycksbo mill

 **EUWID** + 11 March 2026 |  ~ 1 min | [Published in issue 11/2026](#)

Polish graphic and packaging paper manufacturer Arctic Paper has started up a modernised biomass boiler together with pellet production at its paper mill in Grycksbo. The investment amounts to SEK300m (€27m). Arctic Paper said the project is intended to strengthen both competitiveness and energy self-sufficiency of the site.

By supplying its own energy, the company expects annual cost savings of around SEK50m (€4.5m). The pellet production facility is designed for a capacity of 50,000 tpy and is expected to generate annual revenues of about SEK100m (€9m) once it reaches full capacity.

The Grycksbo mill produces around 220,000 tpy of graphic papers on two paper machines under the brands G and Arctic Volume. Of the company's total workforce of 1,584 employees, 337 are employed at the Grycksbo mill.

Sappi Europe installs steam storage system in Maastricht

 **EUWID +** 11 March 2026 |  ~ 1 min | [Published in issue 11/2026](#)

Graphic and packaging paper producer Sappi has taken a further step at its Maastricht mill as part of its decarbonisation strategy. Sappi said it had installed a steam storage system which will be able to temporarily store excess steam and feed it back into the production process when demand is higher.

The system was tailor-made and installed by Bilfinger België & Nederland. The steam storage system is part of several energy and sustainability projects at the Dutch site and is intended in particular to increase energy efficiency, reduce fuel consumption and CO2 emissions. The new system concurrently aims to improve the flexibility of production at the Maastricht mill, according to Sappi.

In technical terms, the storage system will be integrated into the mill's new 15-bar steam network. In combination with the internal energy sources, this will create a flexible energy system that stores surplus energy and uses it as needed.

At the Maastricht paper mill, Sappi has capacity to produce 260,000 tpy of coated fine paper and coated board. The site employs 480 persons.

Viscose producer Kelheim Fibres will be closed

 **EUWID+** 11 March 2026 |  ~ 1 min | [Published in issue 11/2026](#)

Following the failure to negotiate a solution to continue operations, German viscose fibre producer Kelheim Fibres announced that it would cease operations as of 31 March. The company filed for insolvency in October 2024, and proceedings were opened in self-administration at the beginning of January 2025.

A takeover contractually agreed on November 5 by the LEO III Fund, advised by the Dubag Group, could not be completed due the non-fulfilment of key conditions, including a purchase commitment from a major customer for 2026. The company subsequently announced production would cease at the end of March. At that time, a new prospective buyer had also come forward, but subsequently withdrew.

Kelheim Fibres has 300 employees and can produce up to 35,000 tpy of viscose fibre used in hygiene products, specialty papers and technical applications.

UPM teams up with Andritz and Holypoly to recycle paper machine clothing

 **EUWID+** 11 March 2026 |  ~ 1 min | [Published in issue 11/2026](#)

Finnish pulp and paper producer UPM-Kymmene is collaborating with the Austrian engineering company Andritz and German recycling company Holypoly in a project to recycle paper machine clothing. Holypoly and Andritz launched this initiative on an industrial scale in January 2025. The project aims to return used fabrics and felts made from synthetic polymers to the circular economy, thereby avoiding thermal disposal and its associated emissions while reducing demand for fossil-based raw materials, Andritz said.

Press felts made from different polyamides (PA) and forming fabrics mainly composed of PA and polyethylene terephthalate (PET) are collected from UPM's paper mills. Holypoly is responsible for coordinating the collection and recycling the material in compliance with all relevant regulations, Andritz explained.

The recycled material resulting from this process is primarily used to produce injection-moulded parts for the automotive and furniture industries, where it replaces primary polymers. "Demand for such material is high, and the recycling process is already fully scalable," the project partners say.

In parallel, Andritz is working to further optimise granulate quality and specifications, which would enable this recycled material to be used for the manufacturing of new paper machine clothing. With this initiative, Andritz says it aims to fulfil its responsibility as a manufacturer and exceed the extended producer responsibility requirements (EPR) planned by the EU. UPM has been "actively involved" in the development process, providing materials, and several of its mills in Finland and Germany are already participating in the programme.

Essity UK turns paper residues into animal bedding

 **EUWID +** 11 March 2026 |  ~ 1 min | [Published in issue 11/2026](#)

Essity UK has developed a process at its Stubbins mill to convert fibre residues from recovered paper processing into animal bedding. The project was implemented in cooperation with recycling company **Veolia** and machinery supplier **Arden Wood Shavings**. The fibre residues arise during the production of tissue from recovered paper and had previously been treated mainly as waste, the company explained. The products are marketed under the names Agribed and Agrisoft and are used primarily in poultry and dairy farming.

Contiweb joins Eurosac

 **EUWID+** 11 March 2026 |  ~ 1 min | [Published in issue 11/2026](#)

Dutch company **Contiweb** is strengthening its commitment to the paper sack market by joining **Eurosac**, the Paris-based European umbrella organisation for the paper sack industry. The company is a supplier of web guidance systems and roller aids for printing and packaging production, among other things. Contiweb's Eurosac membership represents an important step towards further deepening cooperation with manufacturers and actively contributing to the further development of the industry, the company said at the beginning of March.

Valmet build electric boiler

 **EUWID +** 11 March 2026 |  ~ 1 min | [Published in issue 11/2026](#)

Valmet is building a new three-megawatt electric boiler at its Yrittäjänkatu fabrics production unit in Tampere in Finland to reduce greenhouse gas (GHG) emissions and improve energy efficiency. According to a company statement, the total investment volume is around €2m and the new boiler, which is expected to be commissioned in late 2026, will be integrated into the power plant's heat production. The boiler will produce hot thermal oil, which will be utilised in both production processes and facility heating. It is planned to be operated as a base-load unit, while the existing gas and oil boilers will be reserved for peak-load situations. This structure enables the selection of the most cost efficient and lowest emission energy source at any time. By replacing the use of fossil fuels this investment will enable a further 25-50 per cent reduction of the factory's GHG emissions.

2 Point Zero is now the majority owner of Italy's ISEM Packaging

 **EUWID+** 11 March 2026 |  ~ 1 min | [Published in issue 11/2026](#)

Investment company **2 Point Zero**, part of Abu-Dhabi-based Multiply Group, has announced the completion of the acquisition of a majority stake in Italian luxury packaging producer **ISEM Packaging** for AED704m (€165m). 2 Point Zero now owns 60.8 per cent of the shares in the Italian company, while Peninsula Capital and minority investors own the remaining 39.2 per cent. ISEM Packaging produces premium packaging such as rigid boxes, folding cartons, silk paper, and dust bags for several sectors including the perfumery and cosmetics as well as the wine and spirits sectors. The company runs 11 plants and delivers luxury clients such as LVMH, Gucci, L'Oréal, Puig and Coty.

Manroland Sheetfed files for insolvency

 **EUWID +** 11 March 2026 |  ~ 1 min | [Published in issue 11/2026](#)

German printing press manufacturer Manroland Sheetfed initiated protective shield proceedings under German insolvency law on 3 March 2026. The company attributed its financial difficulties to the persistently weak market for printing presses. Manroland has been struggling with declining sales for years, while losses have continued to rise.

In the 2025 financial year alone, the company reported a net loss of €43.2m, reported its parent company Langley Holdings. At the same time, the British parent group posted a profit before tax for the full year 2025, which the company said underlined the disproportionate weakness of the printing press division. CEO Anthony Langley said in the Manroland annual report that the Board had concluded the situation was not sustainable and was currently reviewing the available options. The company added that far-reaching measures to realign the business are unavoidable in order to restore a viable footing. These measures reportedly include job cuts, although the number of potentially affected positions has not yet been disclosed.

Manroland attributes its weakness to a generally shrinking market for printing presses. The Chinese market, for example, which once accounted for around 40 per cent of deliveries of new printing presses, has been hit particularly hard by the downturn. Since Langley Holdings acquired the former sheetfed offset division of the insolvent Manroland AG in 2012, the German machinery manufacturer has repeatedly faced structural challenges.

Pulp business weighs on Arctic Paper's results

 **EUWID** + 11 March 2026 | ⌚ ~ 1 min | [Published in issue 11/2026](#)

The weak performance of the pulp business weighed on Arctic Paper's results in the 2025 financial year. Despite newly gained market share and an increase in deliveries in the paper division, the company slipped into the red in terms of operating profit (PLN-166m) and net profit (PLN-175.4m). Sales and Ebitda also fell.

Arctic Paper describes last year's market conditions as very complicated. Demand was weak and competition intense, putting pressure on prices. Strong exchange rate fluctuations reportedly were an additional burden, with the company estimating the negative currency effects for the entire year at PLN27.7m.

Arctic Paper reports that deliveries rose and prices fell in the paper business, and despite turbulent conditions, it was able to gain market share. The entry of Asian competitors into the European market exerted sustained pressure on prices, but the company recorded sales growth in the US market. Against the backdrop of prevailing overcapacity, Arctic Paper hopes for closures and consolidation and a better balance between supply and demand. Arctic Paper has announced a price increase of 8-10 per cent for the second quarter in order to restore its profitability.

In the pulp segment of its subsidiary Rottneros, the positive effects of higher sales volumes were more than offset by lower market prices and unfavourable currency effects. Together with a write-down on inventory of SEK35m, this led to a negative Ebitda.

In the packaging segment, Arctic Paper's kraft paper sales volumes remained relatively stable throughout the year. The Kostrzyn plant began industrial-scale production of pulp trays.

The company's management board will not propose a dividend for 2025.

Arctic Paper Group results

million PLN	October - December		January - December	
	2025	2024	2025	2024
Key figures				
Sales	745.1	810.8	3,197.6	3,434.7
EBITDA	-33.5	38.8	28.3	298.6
Operating result	-72.2	11.3	-166.0	184.3
Net result	-75.4	18.8	-175.4	161.1
Business area review				
Paper				
Sales	517.9	576.4	2,224.4	2,413.7
EBITDA	36.4	46.3	113.3	243.2
Pulp (Rottneros), SEK million				
Sales	587	626	2,539	2,710
EBITDA	-190	10	-253	179
Deliveries, in 1,000 t	84.9	72.8	334.9	333.2

Source: Arctic Paper Group

Schades announces price increase for thermal paper

 **EUWID +** 11 March 2026 |  ~ 1 min | [Published in issue 11/2026](#)

Schades Group has announced a 10 per cent price increase for its thermal paper rolls applicable from 1 April 2026. The company says it is exposed to high cost-pressure, leaving it no choice but to pass on the inflation if future production and product quality are to be ensured. The industry is confronted with price increases for raw materials e. g. pulp, key chemicals as well as logistics and, not least, energy. Schades Group, part of Hansol Paper, produces POS paper rolls and labels. The group operates six production hubs in Germany, Denmark, France, the UK and Poland.

Mitsubishi announces price increase for thermal paper range

 **EUWID +** 11 March 2026 |  ~ 1 min | [Published in issue 11/2026](#)

Mitsubishi HiTec Paper Europe has announced plans to increase the prices of all of its thermal papers due to higher costs, particularly in the areas of pulp, chemicals and freight. Effective for deliveries as of 1 April 2026, prices of all thermal papers of the thermoscript brand will therefore rise by 10 per cent worldwide. Mitsubishi HiTec Paper Europe is a German subsidiary of Japanese Mitsubishi Paper Mills, a globally operating specialty paper producer. Its Bielefeld plant manufactures thermal and inkjet paper.

Niklas Westin Sundberg new CDIO at Essity

 **EUWID +** 11 March 2026 |  ~ 1 min | [Published in issue 11/2026](#)

Tissue and hygiene products group **Essity** has appointed **Niklas Westin Sundberg** as new Chief Digital & Information Officer (CDIO). He will succeed **Carl-Magnus Månsson**, who leaves the company. Mr Westin Sundberg will be a member of Essity's executive management team from 15 April, and will be responsible for the Digital Transformation and Business Enablement function. He has previously worked for globally operating companies such as Kuehne+Nagel and Assa Abloy, where he led business-driven IT strategies, cybersecurity initiatives and AI programmes.

Roberto di Molfetta becomes Comieco's new General Director

 **EUWID+** 11 March 2026 |  ~ 1 min | [Published in issue 11/2026](#)

Comieco, the Italian consortium for the recovery and recycling of paper-based packaging, has appointed **Roberto di Molfetta** as its new General Director. He succeeds **Carlo Montalbetti**, who is stepping down from the position after 37 years at the helm of the consortium. Mr Montalbetti will remain a strategic advisor. Mr Di Molfetta previously was Comieco's Vice President and has been with the consortium since 1998.

Rottneros appoints Per Bjurbom as new President and CEO

10 March 2026 | [Frauke Schmidt](#) | 🕒 ~ 1 min | [Published in issue 11/2026](#)

Swedish market pulp producer Rottneros has appointed Per Bjurbom as its new President and CEO with effect from 12 March 2026.

The company announced on 9 March that Mr Bjurbom will succeed acting President and CEO Magnus Wikström, who will step down from the role.

Mr Bjurbom brings more than 35 years of international leadership experience in the pulp, paper and packaging industries. Over the course of his career he has held senior executive positions at several Nordic forest industry companies, including Nordic Paper, Billerud, Holmen and Stora Enso.



Per Bjurbom, CEO of Rottneros as of 12 March 2026

Chairman Per Lundeen said the board was confident that Mr Bjurbom's leadership and experience would support the further development of the group. At the same time, he thanked Magnus Wikström for his work as acting CEO and for ensuring stable leadership during the process of appointing a permanent chief executive.

Rottneros produces market pulp at two mills in Sweden and supplies fibres mainly for packaging, board and speciality paper applications.

Palm upgrades PM at Eltmann site

 **EUWID +** 09 March 2026 | [Alexander Ungemach](#) |  ~ 1 min | [Published in issue 11/2026](#)

Palm Group is modernising one of the two paper machines at its Eltmann site with an investment exceeding €20m.

The investment aims to improve product quality and expand the mill's product portfolio, the German paper manufacturer confirmed.



Palm invests over €20m to upgrade PM 3 at Eltmann newsprint mill

The two-week upgrade is due to be completed with the restart of PM 3 on 9 March.

As part of the measures, the larger of the two newsprint machines at the site, PM 3, is being equipped with a new calender as well as two new reel slitters, Palm said.

Furthermore, the machine, designed to produce more than 300,000 tpy of coldset newsprint, will also be able to manufacture heatset newsprint in the future.

The Eltmann mill also operates the PM 1 with a capacity of 210,000 tpy. Around 250 people work at the site.

Navigator to build new TM at Aveiro mill in support of UK tissue operations

06 March 2026 | 🕒 ~ 1 min | [Published in issue 11/2026](#)

New 70,000 tpy tissue machine in Portugal is to strengthen European tissue capacity and support the company's converting operations in the UK, says The Navigator Company.



New TM in Aveiro will support Navigator's tissue converting operation in the UK; symbolic image

Portugal's pulp and paper manufacturer The Navigator Company (Navigator) has announced a multi-million euro investment to install a new tissue paper machine at its

industrial complex in Aveiro. The TM will have an annual production capacity of approximately 70,000 tpy and is scheduled to start operations in March 2028. The total investment amounts to around €115m, with €48m planned for 2026, €53m for 2027 and €14m for 2028. The project will also receive support under the Portugal 2030 programme, according to Navigator.

The new tissue machine in Portugal is intended to support the group's UK tissue operations while strengthening industrial integration in this segment. The project forms part of Navigator's broader strategy to consolidate its growth in the European tissue market, the company says.

In 2024, The Navigator Company has [acquired UK tissue products manufacturer Accrol](#) and renamed it to Navigator Tissue UK.

Navigator's tissue business in the UK currently does not produce its own reels but has the capacity to process around 130,000 t of tissue per year.

DS Smith expands packaging capacity in Denmark

06 March 2026 | [Frauke Schmidt](#) | 🕒 ~ 1 min | [Published in issue 11/2026](#)

DS Smith plans to invest up to DKK100m (€13m) in its corrugated packaging plant in Grenaa, Denmark, to strengthen production capacity and improve quality and efficiency.



DS Smith installs new packaging machinery at the Grenaa site in Denmark.

The investment centres on the installation of a new rotary die-cutter line with five printing units for flexographic

printing and converting of corrugated board. The equipment - made by German corrugated board processing machinery manufacturer Göpfert - combines servo-driven technology, vacuum sheet transport and automatic register control to ensure high precision and stable operation, DS Smith said.

DS Smith's Grenaa packaging facility serves customers in a wide variety of sectors, ranging from e-commerce and food and beverage, to industrials. With the investment, DS Smith expects to increase the plant's processing capacity by up to 15 million m² of corrugated board per year. The expansion is also intended to improve delivery reliability and shorten lead times for customers in Denmark and the wider Nordic region.

The company will also invest to expand its packaging facility in Bredasten (Värnamo), Sweden. The upgrade will allow DS Smith to relocate its warehouse operations from Malmö to Bredasten. "The transition will take place in phases with completion anticipated by June 2027," the company explained.

Smurfit Westrock acquires Cartomanabí in Ecuador

 **EUWID +** 06 March 2026 | [Frauke Schmidt](#) | ⌚ ~ 1 min | [Published in issue 11/2026](#)

Smurfit Westrock has expanded its presence in Latin America through the acquisition of the Ecuadorian corrugated packaging producer Cartomanabí.

The company operates a corrugator and packaging and printing machinery at its facility in Montecristi, Ecuador, with an annual production capacity of more than 50,000 t.

Customers mainly come from the agriculture, protein, FMCG and industrial sectors.



Smurfit Westrock expands its footprint in Ecuador

With the acquisition, Smurfit Westrock aims to strengthen its position as a leading supplier of corrugated packaging in Latin America and expand its integrated supply chain in the region. The group plans to supply paper for the Ecuadorian operation from its North American mill system, thereby increasing integration within its packaging network.

Lecta to sell Condat specialty paper mill to SPB

Industrial biopark to be created / Future of paper machine still uncertain

 **EUWID** + 05 March 2026 | [Valeria Buß](#) | ⌚ ~ 2 min | [Published in issue 11/2026](#)

Lecta will sell its Condat specialty paper mill in France to French industrial holding company SPB (Société de Participation de la Braye), who will acquire it via its subsidiary Condat Solutions. On 2 March, the commercial court of Bordeaux, which had received [three takeover offers](#) from potential investors, selected the French group's offer. The change of ownership is scheduled to take place on 1 April, a company spokesperson told EUWID. SPB plans to build an industrial biopark at the site in Le Lardin-Saint-Lazare.



Lecta's Condat release liner mill will be sold to a buyer from outside the paper industry.

Whether paper production will continue remains uncertain. SPB said it would conduct a five-month feasibility study in cooperation with Austrian specialty paper manufacturer Delfort to assess whether PM 8 can be restarted. The machine was already shut down in mid-January and production has been idle ever since, the spokesperson said. During the sales process, there were no funds available to finance production, she added. The already idled PM 4 at the site is planned to be dismantled.

PM 8 is the only remaining paper machine at the Condat mill. It mainly produces release liner base papers for labels with a capacity of around 115,000 tpy. Lecta had converted the machine, which used to make fine paper, in 2021, hoping this would open up new prospects for the site. The mill's second fine paper machine, PM 4, was shut down in 2023. Only last year, Lecta commissioned a new boiler fired with refuse-derived fuels in order to cut energy costs.

Despite these investments, the mill ran into financial difficulties. In October 2025, Lecta ultimately [filed for restructuring proceedings](#) for the site and announced its intention to sell it.

90 per cent of jobs to be cut

For the workforce, the court's decision is catastrophic news, as 90 per cent of employees will lose their jobs as part of the sale. SPB plans to retain only 21 out of around 220 jobs. However, it says that up to 300 jobs could be created again in the coming years. The company has extensive plans for the site and is planning several investments.

SPB reports that it is planning to develop a cross-sector industrial biopark in Le Lardin-Saint-Lazare. The project includes the installation of a recycling facility for low-carbon aluminium as well as a nanocellulose plant, with investments of €45m and €50m respectively over the next 2.5 to 3 years. In addition, the company wants to build an energy hub with a capacity of around 200 MW for a further €50m. Finally, €400m is to be invested in a supercomputer cluster for artificial intelligence and high-performance computing.

SPB describes itself as a company specialising in the ecological reindustrialisation of paper sites in France. In 2021, the group already took over the former Arjowiggins mill in Bessé-sur-Braye, which today produces nitrile gloves. Condat Solutions was founded in 2022 under the name PMI Développement but was renamed in January 2026, shortly before the takeover of the Condat mill.

Metsä Fibre to take market-related downtime at Joutseno NBSK pulp mill

05 March 2026 | 🕒 ~ 1 min | [Published in issue 11/2026](#)

Shutting down production at Joutseno mill is necessary "to adjust pulp production to match the current uncertain demand situation in the Asian markets," says Metsä Fibre.

Metsä Fibre, a company of Finnish forest products manufacturer Metsä Group, has announced a decision to take commercial downtime at the Joutseno pulp mill as of the end of March. The shutdown will be initiated on 31

March and it is not clear when the mill will resume production again. Market developments will be monitored on an ongoing basis, and a decision on resuming production will be made depending on demand, the company says.

Joutseno pulp mill, near the Finnish town of Lappeenranta, employs 190 people and produces northern bleached softwood kraft (NBSK) pulp with a capacity of 690,000 tpy.

The news of another temporary shutdown comes as no surprise: Production at the Joutseno pulp mill had been standing idle for six months in 2025. Last December, [CEO Ismo Nousiainen had indicated that further significant adjustments would be necessary in 2026, with a particular focus on Joutseno pulp mill.](#)



Metsä Fibre is set for another commercial downtime at the Joutseno NBSK pulp mill in Finland.

Fibre Excellence temporarily stops production in Tarascon

05 March 2026 | [Valeria Buß](#) | 🕒 ~ 1 min | [Published in issue 11/2026](#)



The Provence pulp mill in Tarascon is currently idle

French pulp producer Fibre Excellence has halted production at its Provence mill in Tarascon. The company announced a two-week downtime for the mill that will last from 2 to 15 March. According to a company spokesperson, production at Fibre Excellence's second site in Saint-Gaudens is not affected and is running normally.

Fibre Excellence explained that the downtime is happening against the backdrop of persistent tensions in the industrial timber market in France, exacerbated by severe weather conditions that have disrupted supplies and logistics. Wood stocks would have to be replenished, it added. Wood purchases and pulp deliveries to customers are said to continue during the stoppage, although information from German wood suppliers suggests that the company has significantly reduced its purchasing.

Fibre Excellence is currently facing a critical situation. The company has severe financial problems and is looking for a quick solution to avoid insolvency. The French government has recently [offered €150m in financial support](#) to help the company navigate its current difficulties and preserve jobs. The company is reviewing the proposal and its conditions.

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

