

March passes without price increases on Italy's corrugated case material market

Fresh price hikes announcements for fine paper set the tone for Q2

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Recycled corrugated case material manufacturers' attempts to charge more for March deliveries proved unsuccessful in Italy. Buyers had fundamentally refused to pay more, whether from the beginning or middle of the month. Paper mills have meanwhile announced an additional price increase for April and will make a new attempt in Italy, as well.

EUWID Price Watch Italy			
March 2026			
Prices in € per tonne free delivered unless otherwise stated	March 2026	February 2026	March 2025
Fine paper			
Woodfree uncoated			
Copy paper 80 g A4 80 grade	880 - 940	880 - 940	870 - 1.050
Copy paper 80 g A4 70 grade	740 - 840	740 - 840	870 - 970
Offset news 80 g	870 - 940	870 - 940	940 - 1.050
Offset news 80 g	770 - 840	770 - 840	870 - 970
Woodfree coated			
Sheet, double coated, 100 g	910 - 940	910 - 940	840 - 1.140
Feed, double coated, 100 g	820 - 940	820 - 940	840 - 940
Publication paper			
Standard newspaper 40 g	540 - 540	540 - 550	595 - 620
Standard newspaper 40 g	575 - 590	575 - 590	640 - 650
Improved newspaper 52-56, 12 g	590 - 610	590 - 610	620 - 640
LWC, offset 80 g	720 - 740	720 - 740	740 - 760
LC, offset 80 g	620 - 640	620 - 640	640 - 670
LC, offset 100 g	650 - 670	650 - 670	670 - 690
Corrugated case material			
Primary fibre corrugated case material			
Unbleached kraftliner 170 g, European quality	620 - 630	620 - 630	630 - 650
White top kraftliner 140 g, European quality	570 - 620	570 - 620	590 - 630
Recycled corrugated case material			
Recycled facing, European quality	340 - 350	340 - 350	400 - 410
Techliner B, European quality	340 - 350	340 - 350	440 - 450
Techliner B, European quality	300 - 310	300 - 310	410 - 420
White top techliner, grade C, 140 g, European quality	490 - 510	490 - 510	530 - 550
Maklun, Italian quality	290 - 300	290 - 300	340 - 360
Techliner B, Italian quality	340 - 350	340 - 350	380 - 390
Catanboard			
GD 8	540 - 630	540 - 630	600 - 670
GD 10	510 - 570	510 - 570	540 - 600
GD 9	510 - 540	510 - 540	540 - 570
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Corrugated case material manufacturers are not the only ones wanting to raise prices for April deliveries. Since the start of the war on Iran at the end of February and the further escalation of the conflict in the Persian Gulf and the Middle East in March, manufacturers across many segments of the Italian market have radically changed their perception of the crisis. Rising diesel prices have prompted hauliers in Italy to announce immediate hikes of around eight to ten per cent. For paper and board mills, this means higher costs for both supplying customers and sourcing raw materials. Additional pressure for producers stems from rising gas prices and uncertainty on energy markets. The degree of pressure to act now largely depends on how heavily each mill relies on gas in its energy mix, what share of its gas needs is hedged via longer-term contracts, and at what price.

The first producers have already responded to the new state of affairs and have informed their customers of the need to raise their prices. However, it does not always appear to be clear in which form higher prices might take hold. A few manufacturers are opting for temporary surcharges so that they can increase prices as soon as possible in some cases, as soon as mid-March – and within existing contracts. Other manufacturers have announced standard industry price increases applying to deliveries from early April, or to all new orders placed from the middle or the end of March, as they favour higher prices for a long time over short-term hikes linked to the exceptional market situation.

The paper industry's customers point out that not only paper and board mills, but also other businesses across the entire value chain are operating on thin margins while facing rising costs for transport, chemicals and, not least, electricity and gas. A few customers accuse the industry of stoking a sense of crisis in order to push through its demands in the market as quickly as possible.

Fine paper producers reiterate their calls for higher prices

With fresh price notices issued in March, a few European coated and uncoated woodfree paper producers have underlined their positions just ahead of negotiations on second-quarter contracts. That being said, the vast majority of suppliers had already defined their price goals for the second quarter in February. Depending on the starting price, fine paper manufacturers are asking for increases of between four and ten per cent or €50/t on all deliveries from April onwards.

In light of recent developments in Iran and the Strait of Hormuz, and the feared impact on European energy markets, producers are determined to push through their announced price hikes as widely as possible. "Buyers will have to hand over an additional €40-50/t for woodfree coated paper from April onwards. There is no way around this," one manufacturer told EUWID.

The paper industry's customers stress that successfully implementing price increases takes more than higher costs and firm resolve on the part of the mills. Paper producers counter this by pointing to their order books, which have been filling steadily since mid or late February and are currently good enough to keep machines operating at decent capacity utilisation. A few mills reported order backlogs of four weeks or more in mid-March. Whether the April hikes will ultimately be implemented to the extent targeted, and how long they will hold, will also depend on the extent to which paper buyers sourced paper in February and March, a paper merchant pointed out.

European manufacturers' hopes of success are also being fuelled by slowing imports from Asia. A few Asian woodfree uncoated paper producers have already informed their customers of challenges in moving goods to Europe. In addition to a €50/t price increase, they are also seeking extra surcharges linked to specific logistics routes. Lead times for coated woodfree paper shipped from South Korea are also reported to have lengthened again recently. Even after these adjustments, import prices generally remain well below prices for European grades. However, buyers are increasingly concerned about potential delivery disruptions or are simply not prepared to wait that long for paper. This is currently prompting a shift to European grades and is further supporting capacity utilisation, sources on the Italian fine paper market said.

Manufacturers and buyers trying to find the right price model for publication paper

March brought no changes for Italian publication paper prices. Prices were negotiated well before the outbreak of the war in Iran and the resulting turmoil on energy markets, so they generally remained in place throughout the first quarter. From around mid-March onwards, suppliers and buyers on the Italian publication paper market stepped up discussions on the direction of prices. After an initial attempt to raise paper prices in the first quarter failed, manufacturers have reaffirmed their plans and tabled fresh hike demands for the second quarter. Several magazine paper producers have issued official price letters covering orders from mid-March and deliveries from April. Producers of newsprint and a few other magazine paper suppliers have approached their customers directly. Price hike demands have mostly been in the range of €30-50/t for coated magazine paper and €20-30/t for uncoated magazine paper and newsprint.

Publication paper producers are determined to charge more in the second quarter. All the more so as they fear that the escalation in the Persian Gulf will drive another increase in costs for transport and logistics, chemicals, auxiliaries and energy. Price talks were still not done and dusted across the board in the penultimate and final weeks of March. Early outcomes point to varying pricing models: smaller hikes taking effect as of the start of the second quarter and applying for three months, or initially unchanged prices, with larger adjustments for the remainder of the period. A few buyers complained that in certain cases paper manufacturers did not want to guarantee prices for the second quarter and instead wanted to renegotiate prices monthly.

As a general rule, the paper industry's customers recognise the need for the energy-intensive sector to raise its prices, particularly as gas prices on the European spot market have almost doubled at times within a matter of weeks. At the same time, however, they stress that they expect paper suppliers to show some consideration for the difficulties facing their customers. Diesel surcharges in transport, as well as higher costs for chemicals, packaging materials, gas and electricity, are also hitting printers and publishers, one paper buyer complained.

A variety of contacts interviewed by EUWID offered different opinions about supply and demand on Italy's publication paper market. Paper mills mainly highlighted improvements in demand and stronger machine utilisation over the past four to six weeks, noting that customers are facing longer lead times for certain grades. Commercial printers generally felt they had ample supplies on hand and saw little reason to worry that this situation might change. Not all paper manufacturers had equally good order books and would gladly work more with some customers to keep their machines busier, a commercial printer commented. Likewise, publishing house buyers also underline good paper availability, even for a few specialty grades, and see little reason for concern that the supply situation for publication paper might turn against them in the near future. They were therefore all the more surprised by the actions of some coated magazine paper suppliers, who are intent on invoicing more for deliveries from April at almost any cost, despite surplus capacity.

March mark-ups for RCCM fail but producers launch new attempt for April, also for kraftliner

Unlike in a few other European markets, recycled corrugated case material (RCCM) manufacturers were unable to institute higher prices in Italy in March. The paper industry's customers did not accept higher prices, even from mid-month. The Italian recycled corrugated case material market had experienced an oversupply and sluggish demand in recent weeks and months. Stable recovered paper prices in February and March did the rest.

Resistance from independent, non-integrated corrugated board and packaging producers in Italy also played a part. In the corrugated sheet segment, in particular, where EUWID contacts report significant surplus capacity and suppliers are forced to offer aggressively low prices due to intense competition, buyers pushed back against any attempt to raise paper prices. With no way to pass higher costs on to their customers at short notice, no sheet manufacturer was prepared to accept a price increase, market players told EUWID.

For April, paper mills across Europe have announced further price hikes of mostly €100/t for recycled corrugated case material, and producers intend to make a fresh attempt to push through these rises in Italy as well. This time, they say they will press their demands more forcefully. Facing heightened uncertainty in the Persian Gulf region and rapidly rising costs for gas, transport and logistics, as well as chemicals and additives, mills feel increasingly cornered. A few paper manufacturers have reportedly even warned customers in Italy that they will not supply paper unless the price increase is accepted.

Quite a few customers remain entirely unmoved by the paper industry's threats. Others are taking them more seriously and, despite generally good supply, are genuinely worried about not receiving enough paper of the right quality in time to meet their own contractual obligations. Experts noted that the corrugated board industry operated on a just-in-time basis and did not hold large inventories. If customers now suddenly upped their demand out of concern for their supply chains, the corrugated board sector must first adjust its orders with the paper mills, one integrated packaging manufacturer explained.

Paper manufacturers are hoping to capitalise on this "sense of unease". Paper mills generally reported better demand and an uptick in order intake in March, with a few now enjoying well-filled order books and others being at least noticeably busier again, even if still not entirely satisfied. If it were not for the low prices, the strain of high production costs and ongoing worries about the next hike in gas prices, manufacturers would be happy to carry on at this pace for a couple more months, one Italian paper producer remarked.

Against this background, paper manufacturers told EUWID that the starting point for price talks now looks more favourable than at the end of February or the beginning of March. It was still unclear in the last two weeks of March whether Italian recycled corrugated case material prices would first edge up by €40/t in April – as the paper industry already did in Germany and France in March – or whether producers would move straight to a larger increase.

European kraftliner suppliers will also get involved in the talks about April prices. Several manufacturers have unveiled plans to invoice more for white-top and brown kraftliner as well as for semi-chemical fluting, and are seeking to tack on €80-100/t as a rule.

European kraftliner suppliers were generally upbeat in March and saw scope for small price increases, even in a highly competitive market such as Italy's unbleached kraftliner segment. As with recycled corrugated case material, a few manufacturers mentioned a marked pick-up in demand in March and hope to turn this to their advantage. However, in their view, it remains difficult to judge how much of this additional demand reflects customer stock-building and how much is genuine consumption at the start of the new kraftliner season.

Several converters told EUWID that unbleached kraftliner prices had not come under noticeable pressure in the penultimate and final week of March. They said they did not expect to pay any surcharges to their suppliers, at least for April. Kraftliner mills are generally running on biomass rather than gas, they added, and kraftliner prices are comparatively high. Building a price increase on the same arguments as those for recycled corrugated case material, therefore, makes little sense and is unlikely to succeed, one buyer pointed out.

The success of price talks for unbleached kraftliner in Italy will largely depend on how prices for imports from the US and Brazil develop. In March, EUWID received conflicting reports on how US suppliers are proceeding in both their home market and Italy. Following a February price cut in the US, a few producers announced a March increase of around \$70/t. A few EUWID contacts reported that US producers had only limited – if any – success in pushing through the price hikes on the domestic market.

So far this year, US manufacturers have not raised their prices for shipments to Italy, either. Prices were generally stable or even trended slightly lower because US suppliers benefited from the strong euro when collecting orders in Europe for production in January and February. This meant that US kraftliner was available in Italian ports at prices starting at €570/t CIF in March, with similar sales prices expected in April as well.

Sources told EUWID that unbleached kraftliner from Brazil could be purchased for prices starting at €560/t in March. Kraftliner made in Brazil is readily available, and customers are increasingly using supply to shore up supply in the face of a potential downturn in US imports.

Changing conditions on Italy's cartonboard market, but price hike notices are still rare

Italy's market for white-lined chipboard has been essentially weak since the start of the year, with little significant momentum from demand. Sources told EUWID that the market was experiencing ample supply, with significant surplus capacity in the GD board segment and typically only modestly busy mills. As has been the case since the middle of last year, Italy has effectively been a sustained buyers' market in the first quarter, with all the usual consequences of such a constellation: intense competition and low prices.

In light of this situation, a few GD suppliers were reportedly still willing to trim their prices for March deliveries slightly in talks with customers in late February. Price cuts were in the region of €10-20/t and served to drum up additional orders and capture market share from competitors. In this vein, market players also reported that a few producers were selectively offering special prices and terms wherever a direct competitor is strongly represented at the moment.

That said, prices for March deliveries did not trend lower across the board, sources in Italy said. Some suppliers are said to have insisted on maintaining current prices under all circumstances. Other suppliers had already inked contracts with fixed prices and durations until the end of March or June at the start of the year, which did not allow for adjustments at short notice.

However, the intensification of US-Israeli attacks on Iran and the closure of the Strait of Hormuz in early March have changed how GD board manufacturers and their customers view market conditions and their position in the market. In the face of rising transport and energy costs, cartonboard producers are coming under increasing pressure to act.

Demand for GD board has reportedly also improved since the outbreak of the war in Iran. Market players mentioned noticeable stock-building by folding carton manufacturers and their customers. One producer is said to have lead times of seven to eight weeks for GD board, while another saw its order backlog rise to four weeks by mid-March. A few converters also reported longer lead times for GD, in some cases stretching into May.

It was thus clear that the new market constellation would not leave price planning untouched. However, it took some time before the first GD board producers communicated their demands to customers. There was certainly no sense of a gold-rush mood among suppliers on the Italian market. A ten per cent price increase is described as the minimum that board mills need to recoup higher costs for gas, logistics, chemicals and packaging materials.

Along with the war on Iran and the escalation in the Middle East, mid-March headlines were dominated by news of the financial situation facing one of Europe's major recycled cartonboard producers. A few market players believed that this highlights the difficult situation facing the cartonboard industry and, in a different market environment, would lend additional weight to calls for price increases – if they were pursued consistently. Unfortunately, sentiment was such that, given the market uncertainties and artificially inflated demand, no one really dared to be the first to implement substantial price hikes for fear of losing business, one board producer explained.

Emotions ran high on Italy's folding boxboard market, too, in March. While surging gas prices appear less acute for a few producers because they use biomass to meet a sizeable share of their energy needs, others are all the more concerned. Compounding matters, businesses are facing diesel surcharges and rising costs for packaging materials and chemicals.

As an immediate response, one European GC board producer announced a temporary €80/t increase on all deliveries from mid-March onwards. However, no further price increases or cost-related upcharges appear to have been announced by the European industry until the last week of March. At the same time, a price adjustment appears to be taking effect for GC deliveries from Asia, with at least two suppliers announcing increases of €30–50/t in response to logistic constraints and higher freight costs linked to the situation in the Strait of Hormuz.

Since the end of February, imports from Asia have come under particular scrutiny. Although cheap imports remain readily available, largely due to substantial stocks in Italian ports and at merchants, possible supply disruptions cannot be ruled out. Reports indicate that government intervention in mid-January has led to certain Indonesian producers or their wood suppliers losing forestry concessions and reduced logging rights, which would affect fibre supply and, consequently, production. Since the escalation of the conflict in the Middle East at the end of February, a few major Asian cartonboard suppliers have also informed customers of expected delivery delays and further price increases, citing limited container availability, rising freight rates and additional insurance charges.

Assessments of demand on Italy's GC board market in March are mixed. While a few cartonboard manufacturers still describe overall market conditions as weak, one supplier reported rising demand and a solid increase in new orders during March. Lead times for Italian customers generally remained at four to five weeks, but in some cases stretched to around seven weeks. This pattern is seen less as a sign of stronger end consumption and more as a result of stock-building and timing shifts within supply chains.

As one cartonboard supplier stated, much now depends on how customers perceive risk. Many converters and their clients started the year with low inventories, and until the end of February, there was little reason to believe that higher stock levels would be needed in the short term. Now, however, panic appears to be growing among some buyers, who were placing significantly larger orders than they actually needed for current consumption as long as material remained available and attractively priced, this source said.

Italy: production, imports, exports and consumption January - December 2025								
	Production		Imports		Exports		Apparent consumption	
	tonnes 2025	% 2025/24	tonnes 2025	% 2025/24	tonnes 2025	% 2025/24	tonnes 2025	% 2025/24
Total paper and board	7,797,526	- 2	5,261,675	7.5	3,487,356	- 2.8	9,571,844	+ 3.3
Newsprint	0	-	320,001	+ 6.6	1,695	+ 36.2	318,306	+ 6.5
Other graphic paper	1,129,138	- 10.8	1,138,127	+ 15.3	854,973	- 9.2	1,412,292	+ 7.7
Uncoated	270,440	- 34.6	654,205	+ 14.0	257,027	- 25.2	667,618	+ 3.7
mechanical	n. a.	-	166,826	- 4.8	23,615	- 15.4	n. a.	-
woodfree	n. a.	-	487,379	+ 22.3	233,412	- 26.0	n. a.	-
Coated	858,698	+ 0.7	483,922	+ 17.1	597,946	± 0.0	744,674	+ 11.5
mechanical	195,474	- 0.6	225,804	+ 20.2	254,360	+ 1.8	166,918	+ 24.1
woodfree	663,224	+ 1.1	258,118	+ 14.4	343,586	- 1.2	577,756	+ 8.3
Household and sanitary paper	1,595,079	- 2.0	74,470	+ 1.8	889,253	+ 0.8	780,296	- 4.7
Packaging paper and board	4,718,158	+ 0.1	3,679,670	+ 5.8	1,679,603	- 1.6	6,718,225	+ 3.6
Corrugated case materials	2,668,188	- 1.1	2,062,607	+ 4.8	379,560	- 21.7	4,351,235	+ 4.1
Corrugating medium	1,535,030	+ 6.7	709,628	+ 10.3	220,270	- 26.2	2,024,388	+ 13.5
Linerboard	1,133,158	- 10.1	1,352,979	+ 2.1	159,290	- 14.6	2,326,847	- 3.0
Cartonboard	n. a.	-	975,173	+ 6.7	464,031	+ 15.0	n. a.	-
Other packaging grades	2,049,969	+ 1.7	641,890	+ 7.6	836,012	+ 2.1	2,366,990	+ 2.7
Other paper and board	355,150	+ 1.5	49,407	- 11.3	61,833	+ 8.5	342,724	- 1.6
Paper	291,301	+ 4.0	40,017	- 12.6	44,852	+ 9.9	286,466	+ 0.5
Board	63,849	- 8.3	9,391	- 5.0	16,981	+ 5.0	56,258	- 11.2
Pulp	n. a.	-	2,983,570	- 4.5	98,391	- 24.2	2,885,179	- 3.7
Woodpulp	n. a.	-	2,960,841	- 4.7	98,168	- 23.8	2,862,673	- 3.9
Mechanical	n. a.	-	28,110	- 16.3	1,500	+ 39.3	26,609	- 18.2
Chemical/semi-chemical	n. a.	-	2,932,731	- 4.6	96,668	- 24.4	2,836,063	- 3.7
	Apparent collection ¹⁾		Imports		Exports		Consumption	
	tonnes 2025	% 2025/24	tonnes 2025	% 2025/24	tonnes 2025	% 2025/24	tonnes 2025	% 2025/24
Recovered paper	6,653,043	- 1.9	338,915	+ 20.9	1,822,134	- 1.5	5,169,824	- 0.8
¹⁾ Consumption + Exports - Imports	n. a. = not available							

Source: Assocarta

French RCP prices largely steady in March

Rising energy costs yet to trickle down to recovered paper prices in France

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The outbreak of the war in Iran and the subsequent spike in natural gas and petrol prices have given people plenty to talk about on the French recovered paper market. However, there have been no direct effects on recovered paper prices to date. Market players are now adopting a wait-and-see approach as they assess how the situation develops. All in all, March was a month of little change, with reasonably solid demand for ordinary recovered paper grades and only slight downward price adjustments for high grades.

EUWID Price Watch Recovered Paper France				
March 2026				
Prices in € per tonne	March 2026	Feb 2026	Jan 2026	March 2025
Mixed paper and board (1.02)	25 - 35	25 - 35	25 - 35	45 - 60
Supermarket corrugated paper and board (1.04)	60 - 70	60 - 70	60 - 70	80 - 95
Old corrugated containers (1.05)	80 - 90	80 - 90	80 - 90	100 - 115
Sorted graphic paper for drinking (1.11)	85 - 95	85 - 95	85 - 95	90 - 100
Intra-Europe exports from France (1.11)	85 - 95	85 - 95	85 - 95	110 - 125
Coloured letters (2.06)	135 - 145	140 - 150	140 - 150	165 - 185
Multi-printing (3.10)	170 - 180	170 - 180	170 - 180	195 - 205
White woodfree uncoated shavings (3.18.01)	335 - 350	340 - 350	340 - 350	390 - 405
Prices in € per tonne ex works, material sorted and in bales.				
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French prices for mixed paper (1.02), supermarket paper and board (1.04), and old corrugated containers (OCC; 1.05) remained unchanged in March. Suppliers had been hoping for a price increase, and there was a degree of anticipation in the market. At the end of the day, though, price hikes proved impossible because sales prices for corrugated case material had not risen either, one source from a waste management company stated. It was not until mid-March, that paper manufacturers succeeded in pushing through initial price increases for finished paper in some cases in response to higher energy costs. Some buyers also argued that recovered paper had been readily available, and that paper mills were sitting on well-stocked inventories.

However, the availability of ordinary recovered paper grades was not universally described as abundant. Waste management companies stressed that collection volumes remained low or had even declined slightly. Availability was decent in March, but with many public holidays coming up in the next few months, buyers now needed to focus more closely on securing supply, some of them said. One paper manufacturer confirmed that no additional volumes were being offered and said that caution with respect to inventory levels was warranted.

Suppliers and buyers alike described demand for ordinary grades as stable, or even slightly higher than in February. Some insiders said there had even been a few slightly higher spot offers, particularly from Germany, as buyers looked to secure material – presumably in preparation for the Easter holidays. Corrugated case material producers in France contacted by EUWID said they had maintained their usual level of recovered paper intake and that their paper machines were currently running at full capacity without any downtime.

Demand for exports to the Far East remained relatively stable in March, insiders stated. A few experts said that business had been quieter in a few countries because of Ramadan, while others did not see any major change in demand. Global geopolitical developments are being closely monitored and are expected to affect freight rates. However, there was no visible impact in March, as the material had been shipped before the higher freight rates came into effect.

Prices for OCC exports to the Far East were stable in March. Market players told EUWID that Asian buyers generally paid up to €105/t ex works for this grade, and occasionally a little more.

Freight rate trajectory will be key

How the export business will develop in April remains highly uncertain. Much will depend on the development of energy prices and the resulting impact on freight rates. Shipping lines had already announced higher sea container rates when EUWID researched this report in mid-March. However, the scale of the actual increase remained unclear. Container availability was likewise difficult to gauge. Market players contacted by EUWID reported hardly any problems to date, but they did not rule out complications in the weeks ahead.

If exports do become more expensive due to higher transport costs, it remains to be seen whether the additional costs will be shouldered by sellers or buyers. That, in turn, will determine whether Asian buyers will still be prepared to source material in Europe. The scale of the freight hikes will therefore be critical.

That said, market participants surveyed in the penultimate week of March did not anticipate a sharp downturn in the export business. One exporter in France was optimistic that demand from Asia might hold up. Asian buyers had already made offers and signalled interest. Before the actual freight rates were fixed, however, it was too risky to conclude orders, this source said. Other waste management companies also took a wait-and-see approach.

Bank holidays might give a boost to demand in April

Given all the uncertainties, market players also found it difficult to provide firm forecasts for prices in France. However, some suppliers and buyers did not rule out the possibility that prices for the ordinary recovered paper grades could edge up in April, not least because some corrugated case material producers had succeeded in pushing through initial mark-ups on their selling prices. Waste management companies argued that collection volumes were relatively weak and that demand was likely to remain decent, as paper manufacturers would need to build sufficient stocks for the holiday-heavy period ahead. Experience also suggested that spot prices tended to provide an early indication of upward price movements, one market participant said. Suppliers also noted that lorry transport was becoming more expensive due to high petrol prices.

On the whole, though, it was still too early to identify any clear trend. Paper manufacturers are hoping for price stability in April. More expensive recovered paper would immediately wipe out the recently secured hikes for finished paper, one containerboard producer commented.

Business on the market for sorted graphic paper for deinking (1.11) followed its usual course in March. Demand in France was described as normal, with orders from neighbouring countries weak but stable. Prices for this grade were unchanged.

Coloured letter prices fall again

By contrast, coloured letter prices (2.06) dropped by another €5/t in March amidst somewhat cooler demand. One tissue manufacturer had used more pulp in place of recovered paper in production, one waste management firm said. Another reported a scheduled stoppage at one paper mill.

White woodfree uncoated shavings (3.18.01) prices also slipped by another €5/t here and there amid lacklustre demand. That being said, several prices had stayed the same.

Supply and demand for multi printing (3.10) were unchanged in March. Demand was not strong, but collection volumes were not high, either. Prices were stable.

France: Manufacturers pushing for higher prices across all market segments

Energy costs intensify price debate / Prices mostly stable in March

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Whilst prices remained unchanged in many segments of the French paper and board market in March, manufacturers issued numerous announcements of their intention to raise prices in April against the backdrop of escalating energy costs. Regardless of the prevailing supply and demand situation, paper manufacturers everywhere increasingly see a need to offset rising costs.

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The market situation is most striking for corrugated case material, where prices for brown recycled grades rose in France in mid-March, and at the same time, demands for significant price increases for all grades from the start of April are being negotiated. Sentiment in the cartonboard market has also shifted in recent weeks: following price cuts at the start of the year, manufacturers now find themselves compelled to charge more for their board.

In the printing and writing paper segment, the market tide has likewise turned somewhat, as all producers are striving – in some cases very resolutely – for a price increase. Despite continuing overcapacity, most manufacturers of woodfree paper are now on track with demands for increases in April. Discussions regarding prices for publication paper in the second quarter were not yet concluded in the penultimate week of March, but many market participants expect prices to rise from 1 April.

Fine paper manufacturers seeking to push through higher prices

In the French market for woodfree coated and uncoated papers, intensive negotiations are underway regarding paper manufacturers' demands for higher prices. Paper producers had announced price rises ranging from 4 to 10 per cent; most recently, the figure of €40/t or €50/t was frequently cited. In most instances, the increases were scheduled to take effect from 1 April, although some were set for 7 April, or even earlier: At least two manufacturers had already demanded price increases for deliveries in March.

In the week starting on 23 March, some paper producers were pursuing their price increases very strictly, whilst others were showing themselves to be somewhat more willing to compromise. However, rising energy prices have strengthened producers' determination to implement further price increases. "We are not negotiating the price demands, but simply implementing them," one producer, for example, stated on the record. This is confirmed by buyers, as is the expectation that "an increase is likely to come", as one buyer put it. Not all negotiations had been concluded yet, and it was still under discussion whether the price demands made would be accepted in full. In some quarters, the view was expressed that increases of around €20-30/t would be seen.

It is confirmed that prices for March deliveries have already been raised in some instances, though this appears to be the exception rather than the rule. In particular, one manufacturer's very short-notice demand to raise all prices from the start of March met with resistance from buyers.

However, paper manufacturers leave no doubt that further demands for price increases will follow. One producer said the current energy cost environment was leaving suppliers little choice but to proceed with the increases. In some cases, new prices apply only until further notice. Paper manufacturers state that they must be able to react to developments in the energy market.

The current round of price increases is taking place against the backdrop of a market characterised by more buoyant demand. Paper manufacturers report that they are currently busy, though they themselves share the view that this is not due to increased paper consumption, but rather to moderate stockpiling ahead of an impending price rise. Consumption of fine paper in France was supported somewhat in the first quarter by the two rounds of local elections; otherwise, the market continues on its path of structural change. In general, demand in March was described as being roughly on a par with last year's levels.

Price talks for publication paper intensify amid energy crisis

Heading into the fourth week of the Iran war and the resulting energy crisis, negotiations to determine publication paper prices for the second quarter are becoming even more intense. While it had been clear for several weeks that producers would attempt to lift prices again as of the second quarter, they now say the rising energy costs have made implementation of such measures even more necessary.

The EUWID market survey in the third week of March found that paper producers had announced price increases for all grades and had already inked a few deals for the second quarter. Many contracts in France were still pending, but players were hoping to conclude these quickly before Easter.

For newsprint, producers were targeting mark-ups of as much as €30/t and contracts were reportedly slated to be agreed with hikes of between €10-25/t. However, in light of the latest volatility in the energy markets and the resulting cost increases, producers are now reconsidering their positions. One producer said that deals signed early on would need to be renegotiated because of the changing cost situation. Other producers are less resolute and say they are satisfied with smaller price increases.

In the third week of March, price hike announcements in the market for SC paper were similar or slightly more modest than those in the newsprint segment, with increases of up to €25/t. Most SC contracts had not been signed yet.

The largest hikes have been announced in the LWC paper segment, where producers are aiming to lift prices by €40 and with some producers refusing to make concessions. As in the other segments, the only question here is how much prices will rise. Most of the market participants surveyed expect that prices for publication paper will increase as of 1 April.

One producer had announced price hikes on very short notice to take effect in March, but customers refused to go along with this, citing their binding contractual agreements.

In response to the current energy and cost situation, the first producers have signalled that they will again use the instrument of energy costs surcharges. Given the expected volatility of energy prices, some paper producers believe this is the right way to manage cost developments. More-over, several suppliers have already signalled plans to implement further price hikes as of the third quarter. Even without the energy crisis, prices are too low, argues one supplier.

Buyers counter that significant price hikes for publication papers could risk lowering demand for print products. Particularly in France, where retailers' print advertising plays a relatively large role, the past few years have shown that retailers tend to rethink their advertising strategies when paper prices surge. This can result in adjustments and reductions in print adverts as part of advertising budgets.

Producers demand massive price hikes for all CCM grades

The price hikes originally envisaged for February were introduced in March by producers of brown recycled corrugated case material on the French market. However, unlike in neighbouring Germany, where the increases took effect at the beginning of the month, those in France were often applicable only as of 16 March. For the most part, increases of €40/t were implemented. Market insiders reported that in scattered instances the hikes would take effect only as of 1 April. The mark-ups apply exclusively for brown recycled corrugated case material, while prices for all other corrugated case material grades remained untouched in March.

However, if producers get their way, the pricing picture could change dramatically as of 1 April. There have been calls for price increases for all grades of fresh-fibre and recycled corrugated case material, stretching to as much as €100/t. For brown recycled grades, the targeted amount was initially €100/t on top of the €40/t already implemented in March. Eventually, the figure settled in at an additional €60/t, bringing the total amount to €100/t, in line with the other grades.

These were mark-ups being pursued by producers at the time of the market survey in the third week of March and price negotiations were ongoing. Paper producers say the recent spike in energy prices forced them to take this dramatic step. Moreover, they argued, sales prices in recent months were already so low that some plants were operating at a barely break-even level.

On the customers' side, the targeted increases are often seen as excessive. Anyone who can do the math can see that energy prices – at least so far – have not yet had affected paper producers' energy costs to an extent that would justify such hefty mark-ups, explained one paper buyer. In fact, the cost situation of paper producers can vary significantly, depending on their energy sources and hedging. Nobody denies that the costs of producing and selling paper have risen considerably. The current energy crisis is unpredictable and one must be prepared for anything at all times, say many players in the market.

Demand on the market for recycled corrugated case material is currently modest to decent, producers say. There is talk of a slight uptick in the business with corrugated board and base paper, but this might be driven by inventory build-up throughout the entire supply chain all the way to consumer goods companies, owing to the current energy crisis. Stocks of corrugated case material in Europe, however, have recently shrunk slightly again and are lower than one year ago. Nevertheless, production facilities for recycled CCM are not running full tilt at the moment, with estimated capacity utilisation of around 82-83 per cent. Recovered paper prices in France stayed broadly stable in March.

Producers of kraftliner apparently have slightly better capacity utilisation, at around 88 per cent, which is largely due to the fact that the kraftliner market has not seen the same influx of additional capacity as that of the recycled grades. Demand for kraftliner has reportedly picked up somewhat, although it has not yet reached the seasonal peak expected in May, according to respondents. In addition, there are and will be maintenance downtime, EUWID was told. Substitution trends in both directions with recycled grades are said to be stable in the kraftliner market.

In price talks, it looked like the hikes being discussed for white-top kraftliner were slightly smaller than those for brown kraftliner, regardless of what size the increases will ultimately be.

First price hike announcements for GD board

Following price cuts for both recycled and fresh-fibre cartonboard in France at the beginning of the year, things had calmed down on the pricing front. Nevertheless, producers were commenting that price hikes would eventually be necessary due to the ongoing high costs. By February, however, there had been no plans in this direction.

The situation changed with the outbreak of the Iran war in March. Rising energy prices have driven a few manufacturers to announce price increases for white-lined chipboard (GD). The first attempts were seen during the course of the month. A few producers – including one major supplier – have informed customers about higher prices for GD as of 1 April or earlier. The targeted amounts are €70/t or 10 per cent, EUWID was told.

Only a small share of GD producers had joined this initiative as of the second-last week of March. Many said the timing was premature and they preferred to be cautious and wait to see how the situation develops. Nobody wants to lose any volumes. The tenor among producers was that a price hike would be necessary sooner or later due to rising costs, but there was some disagreement about when this might happen.

The demand situation is not exactly conducive to a price hike, even though several GD board producers reported a slight uptick in order incoming orders during March. Over the past weeks, delivery times have reportedly also become roughly one week longer. EUWID respondents now mention lead times of between 3-6 weeks for GD. It was unclear whether this slight improvement was solely due to forward buying because of threatening price mark-ups. One customer said he had stocked up a bit on inventory of particular products, but others said they were not seeing any such effects. A different player pointed out that demand at this time of year is always slightly stronger.

The current global events did not have any impact on GD prices in March. Quotes for GD 2 were stable at the prior month's level. Some contracts are valid until the end of March and were therefore untouched. Some market participants noted, though, that energy price discussions had shifted the focus, so downward price pressure was easing. Calls for price cuts had become fainter or stopped completely, said several respondents, including some buyers.

It was a similar story for GC (folding boxboard). The downward price pressure was subsiding here too, even though the market continues to have excess capacities and strong competition. Prices for GC 2 were likewise stable in March.

On the folding boxboard market, producers were still very cautious in the second-last week of March regarding potential plans for price hikes for GC. Price increases were not really a topic on the market. Many said it was too early for such musings. Only one company said it had informed customers about a price adjustment of €80/t as of mid-March – in the form of a temporary energy surcharge. Other producers adopted a wait-and-see stance.

Demand on the GC market was relatively stable in March, according to respondents. One producer said the order situation had improved slightly since the beginning of the year compared with late 2025, and this trend had continued in March as well. In general, however, there is no sense of euphoria. Delivery times were stable at 4-6 weeks, with longer for goods coming from Nordic countries, according to market participants.

EU Council to extend bioeconomy lead markets

 **EUWID +** 25 March 2026 |  ~ 1 min | [Published in issue 13/2026](#)

The Council of the European Union on 17 March adopted conclusions on the EU's new bioeconomy strategy, calling for a broader scope of the lead markets that are to be supported under the framework. In particular, the Council suggested that additional sectors such as pulp, paper and bio-based fibre packaging could be included.

Within the strategy, lead markets are defined as industrial segments with strong potential to accelerate the development of the bioeconomy. To stimulate growth in these areas and create more predictable demand for bio-based products, the EU intends to deploy a range of regulatory and policy instruments.

In the packaging sector, the European Commission had already announced in the bioeconomy strategy presented in November 2025 that it plans to promote the use of both bioplastics and fibre-based packaging materials. However, the concrete regulatory steps outlined so far mainly target bioplastics.

The Council welcomed the Commission's vision of a competitive and sustainable EU bioeconomy by 2040. It also underlined the need to strengthen investment conditions for bio-based industries, for example through faster permitting procedures and more streamlined regulatory frameworks.

The bioeconomy encompasses the use of biological resources such as plants, animals and microorganisms for the production of food, energy and industrial goods. According to the Council, the EU is largely self-sufficient in biomass supply. The sector currently employs around 17.1 million people – almost one in twelve jobs in the EU – and generated an estimated value of €2.7trn in 2023. The bioeconomy is widely regarded as one of the fastest-growing segments of the European economy.

Recovered paper prices in Italy remain unchanged in March

Higher freight costs expected / Development of export business unclear

 **EUWID** + 25 March 2026 | ⌚ ~ 6 min | Published in issue 13/2026

Developments on the Italian recovered paper market in March were primarily shaped by the outbreak of war in Iran and debate over the possible effect of surging energy prices. While business was still being conducted as usual in March, there was uncertainty about how the situation would evolve. Prices in March were stable for all grades of recovered paper. As the end of the month neared, there was still no clear price trend for April.

EUWID Price Watch Recovered Paper Italy				
March 2026				
Prices in € per tonne	March 2026	Feb 2026	Jan 2026	March 2025
Mixed paper and board (1.02)	70 - 80	70 - 80	70 - 80	115 - 130
Supermarket corrugated paper and board (1.04)	75 - 85	75 - 85	75 - 85	125 - 140
Old corrugated containers (1.05)	80 - 95	80 - 95	80 - 95	135 - 150
New shavings of corrugated board (4.01)	100 - 110	100 - 110	100 - 110	150 - 160
Magazines (1.06)	105 - 115	105 - 115	105 - 115	130 - 145
Newspapers (2.01)	150 - 165	150 - 165	150 - 165	165 - 185
White woodfree letters (3.05)	285 - 305	285 - 305	285 - 305	310 - 320
White newsprint (3.14)	290 - 305	290 - 305	290 - 305	310 - 320
White woodfree shavings (3.18)	395 - 420	395 - 420	395 - 420	430 - 450
Prices ex works, material sorted and in bales				
© 2026 EUWID Europäischer Wirtschaftsdienst GmbH			EUWID assumes no liability for the accuracy of pricing information.	
All rights reserved				

For players in the recovered paper market, the spike in energy prices first became apparent in logistics costs. Shipping lines announced higher freight charges shortly after the outbreak of hostilities in the Gulf region, market participants say. The announcements applied to different points in time and varied widely in scale, with some being quite significant, EUWID was told. By the week commencing 17 March, final freight rates were not yet definite.

Many exporters want to wait and see where freight costs ultimately end up before they set their own prices and accept further orders from Asian buyers. Consequently, the Far East export business slowed as March progressed. One waste management firm had halted shipments or moved only limited volumes when it was able to secure containers at acceptable rates. Other players chose to stay on the sidelines, too, or reported problems with container availability. By contrast, a few exporters had shipped off material early in the month and thus exported their usual volumes to Asia.

Far East export prices in March, were not yet affected by the rising fuel prices and remained stable. Either the material had been shipped prior to the start of the conflict or buyers were prepared to absorb the additional costs of higher freight rates, enabling suppliers to sell at the same ex works prices as in February. Old corrugated containers (OCC; 1.05) was therefore still shipped to Asia for up to €105/t ex works.

It remains to be seen whether buyers will continue to shoulder higher transport costs. When asked about demand from Asia, suppliers on the Italian market were quite optimistic. There is interest to buy material, they said. However, everything will depend on how sharply the freight prices ultimately rise, they explain.

If the mark-ups prove very significant, suppliers and customers will have to share the additional costs and ex works prices might therefore decline. The worst case, believes one respondent, would be if Asian mills halted their purchasing because they are unable to pay the higher prices, and “everything collapses.”

However, as of the second-last week of March, nobody was expecting this scenario to materialise. One respondent described the surcharges announced by some shipping companies as unrealistic and said he was waiting to see whether these would be rolled back to some degree. A different player said he expects exports to continue in April, but with smaller volumes.

Prices for ordinary grades unchanged as finished paper prices remain stable

The domestic market in Italy was broadly unchanged in March and players were already looking ahead to April. One supplier said there had initially been a price hike floated, but any plans for an increase had been dashed by outbreak of the Iran war. The spike in energy prices caused problems for paper and board producers, particularly as their own sales prices remained stable. There were various announcements of price hikes in the corrugated case material market, but none of these could be implemented in Italy. In this market environment it made no sense to agree to higher prices for recovered paper, one paper producer firmly asserted, and suppliers had to concede this was true. As a result, quotes for mixed paper (1.02), supermarket paper and board (1.04) and old corrugated containers (1.05) were mostly stable in March.

In general, the market for ordinary recovered paper grades was quite balanced during the month. Market participants described demand as steady. Customers barely took any downtime and most machines were running without interruption, EUWID was told. A number of paper producers described the order situation as “decent”. One supplier speculated that purchasing volumes may have been increased somewhat in anticipation of higher recovered paper prices. A paper mill that is planning a brief downtime over Easter reported having had built up some finished stock for customers in advance. Others, however, did not see any inventory build-up effect.

The supply of recovered paper was also broadly unchanged in March. Most suppliers said collection volumes were generally quite low but stable compared with February. Paper producers reported no problems acquiring mixed paper and OCC. “There is no shortage of material,” several players said.

April price outlook hinges on multiple factors

Amid ongoing uncertainty market participants found it challenging to forecast possible price movements in the coming month. For Italy's export-oriented recovered paper sector, much will depend on whether demand from Asia holds up or not. Another decisive factor will be whether producers of corrugated case material, cartonboard and coreboard succeed with their plans to raise their selling prices. A few paper mills have already warned that they may resort to downtimes if the price hikes do not go through and recovered paper becomes more expensive

A few market participants did not rule out a softening of the export market in April. Within Italy, demand is expected to be relatively stable. Some paper producers want to halt production for a few days over the Easter holidays, but others are not scheduling any downtime for now. Buyers were not worried about the availability of ordinary recovered paper grades next month.

Demand on the market for deinking grades continues to be weak. Magazines (1.06) are difficult to sell, as buyers have scaled back their purchasing volumes for months now. Nevertheless, prices were flat in March. If prices fell below a certain level, sorting no longer made economic sense, explained one player. It was a similar picture on the market for newspapers (2.01). Here, too, prices were unchanged. One customer said they were reluctant to put too much pressure on prices in order to avoid alienating suppliers.

Abundant supply of higher recovered paper grades

A few market participants reported an uptick in the supply of higher recovered paper grades in March. This included material from the USA, which has higher fibre content and is used as a pulp substitute grade. Because of the weak demand for the higher grades, a lot of material is available even though collection volumes are low, say various suppliers in Italy. Rising pulp prices, which could encourage substitution with recovered paper, have not yet had any impact, market insiders told EUWID.

Prices for white woodfree letters (3.05), white newsprint (3.14) and white woodfree shavings (3.18) were nevertheless unchanged in March. One buyer said he had not put a lot of pressure on prices because he wanted to ensure a reliable supply of the limited volumes he still needed.

Ranheim Paper & Board upgrades PM 6 cleaner plant

 **EUWID +** 25 March 2026 |  ~ 1 min | [Published in issue 13/2026](#)

Norwegian recycled cartonboard producer **Ranheim Paper & Board** has modernised the approach flow cleaning system on PM 6 by installing a new hydrocyclone cleaner plant supplied by **Valmet**. The investment was undertaken to replace an ageing installation that had reached the end of its service life and for which spare parts were no longer available. The system can operate efficiently without dilution water but allows for future integration in order to further improve cleaning efficiency, reduce fibre losses or support potential capacity increases. The project was completed during the mill's annual shutdown.

Canfor acquires full ownership of pulp subsidiary and will delist Canfor Pulp

Weak market environment and high fibre costs weigh on annual results

 **EUWID** + 25 March 2026 |  ~ 2 min | [Published in issue 13/2026](#)

Canadian forestry group Canfor Corporation has completed the previously announced full acquisition of its pulp subsidiary Canfor Pulp Products. Under a court-approved plan of arrangement, Canfor acquired all outstanding shares not already held by the group and its affiliates, the company announced in a press release.

Shareholders were able to choose between receiving 0.0425 Canfor shares per share or Can\$0.50 in cash. Following completion of the transaction, Canfor Pulp's shares are to be delisted from the stock exchange. In addition, the company is expected to cease being a reporting issuer.

Challenging pulp market conditions prevent earnings recovery in 2025

The 2025 financial year again proved challenging for Canfor Pulp. Although the operating loss of Can\$96m was significantly lower than in the previous year, a sustained recovery failed to materialise. The year initially started with solid demand, particularly from China. However, market conditions deteriorated at the beginning of the second quarter. Trade disputes and growing economic uncertainty – especially between China and the United States – weighed on global demand.

Developments in pulp prices reflected this trend. After reaching a peak in February, NBSK list prices in China declined markedly until the autumn and only recovered slightly towards the end of the year. On average, price levels remained below those recorded in the previous year. At the same time, producer inventories rose significantly at times and for much of the year were at the upper end of what is generally considered a balanced range. Supply adjustments towards the end of the year contributed to a certain degree of stabilisation.

Operationally, structural factors further weighed on Canfor Pulp's results. Production volumes declined noticeably after the company had indefinitely idled one production line at its Northwood mill in Canada in summer 2024 due to persistent raw material shortages. Consequently, sales volumes also fell significantly. At the same time, costs per tonne increased as lower capacity utilisation coincided with higher fibre costs.

The pulp segment remained clearly loss-making and was the main driver of the group's earnings performance. While lower energy and maintenance costs provided some relief, they were insufficient to offset cost pressures on the raw material side. In addition,

the company was required to recognise impairment indicators in the fourth quarter. These were related not only to falling pulp prices but also to the strained fibre supply situation, declining market capitalisation and rising risks with regard to financial metrics.

Canfor Pulp results				
million CAD	October - December		January - December	
	2025	2024	2025	2024
Key figures				
Sales	140	163	679	799
EBITDA	20	12	-3	43
Operating result	-86	4	-96	-227
Net result	-134	3	-147	-162
Selected business areas				
Pulp				
Sales	114	144	463	593
Operating result	-88	1	-105	-221
Deliveries, in 1,000 t	90	97	409	526
Paper				
Sales	46	48	216	206
Operating result	6	5	17	7
Deliveries, in 1,000 t	-	-	127	130
Source: Canfor Pulp				

Pulpex and Perlen to produce paper bottles

 **EUWID+** 25 March 2026 |  ~ 1 min | [Published in issue 13/2026](#)

By entering into a partnership with Pulpex, a UK packaging technology company, Swiss Perlen Industrieholding has secured exclusive rights to manufacture novel fibre-based paper bottles in the extended DACH region. The agreement grants Perlen the right to produce the paper bottles developed by Pulpex in Switzerland, Austria, Italy and southern Germany.

Reports indicate that Perlen Papier is now assessing the most appropriate industrial deployment of the technology in these markets and will subsequently decide whether to commence production, which could be as early as 2027. According to a company statement, the bottles are certified recyclable as paper in 4evergreen testing, feature a food-grade, odour-neutral barrier coating and offer a commercially attractive shelf life for a wide range of products. The paper bottles are suitable for a range of applications spanning from beverages, cosmetic products and food items to wine and spirits, reports the company.

Sandy Westwater, CEO of the British company, commented that partnering with the Swiss paper producer marks a step on its way to replace over a billion plastic and glass bottles by 2030.

Perlen Papier reports that thanks to its cooperation with Pulpex, it continues to advance its transformation into a diversified company. In January, Perlen Papier announced its strategic intention to diversify into fibre-moulded packaging, alongside its core newsprint business.

Perlen operates two paper machines designed for 360,000 tpy of newsprint and 200,000 tpy of magazine paper (LWC) at the Swiss paper mill.

Recycling associations call for clarity on new EU audit obligations for waste exports

 **EUWID** + 25 March 2026 | 🕒 ~ 4 min | [Published in issue 13/2026](#)

European recycling industry associations have recently issued an urgent appeal to the European Commission to provide clarity on the planned audit obligations under the new EU Waste Shipment Regulation (WSR). Through the European industry platform Recycling Europe, national trade groups including Germany's bvse contributed to a position paper highlighting significant legal and planning uncertainties for companies in the recycling sector.

External audits for receiving facilities in third countries that recover waste exported from the EU are scheduled to become mandatory from 21 May 2027. At the same time, the European Commission only intends to set out to which non-Organisation for Economic Co-operation and Development (OECD) countries certain wastes may be exported in November 2026, when it publishes the "list of countries authorised to receive waste from the EU", bvse criticised. Preparations for the release of the list began last year.

From the industry's perspective, the lack of information before this autumn creates a serious planning bottleneck: within a few months, companies would have to decide which partner facilities they can continue to work with, organise audits and ensure recognition by authorities – without clear guidance on criteria, responsibilities or mutual recognition of inspections, bvse said.

The current situation was "shrouded in a regulatory fog", said Romy Kölmel, policy officer at bvse and vice-president of the recovered paper branch of Recycling Europe. "Companies are expected to prepare for new audit obligations but do not know which standards will apply or which facilities in third countries will actually be permitted to receive shipments."

According to bvse, the joint position paper by European recycling associations underlines their clear support of the environmental objectives of the revised Waste Shipment Regulation (WSR), while stressing the need for clear, workable and coordinated implementation.

Guidelines and mutual recognition

In the position paper, Recycling Europe calls on the European Commission to increase the transparency of the procedure for approving non-OECD countries for waste exports, to issue guidance on the practical application of the audit obligations under Article 46 of the WSR, to introduce mutual recognition of audits across EU member states and to establish realistic implementation timelines, for example by postponing the audit obligation by at least six to twelve months.

It also urges clearer delineation of the roles and responsibilities of the parties involved, including clarification of the legal function of the future EU audit register and the basic rules governing validation, recognition and liability.

Ms Kölmel stressed that recycling companies are willing to implement the new requirements. "But without clear rules and sufficient preparation time, trade disruptions and market distortions are inevitable – with negative consequences for functioning international recycling chains." Bvse is therefore calling on the European Commission to provide binding clarifications promptly and, together with the member states, ensure coordinated implementation of the new provisions.

Ensuring environmentally sound treatment

The audit obligation was introduced as part of the 2024 revision of the EU Waste Shipment Regulation. It is intended to ensure the environmentally sound treatment of exported waste at the receiving facility. The EU exporter must arrange to have an independent third party audit the facilities receiving its waste. If another exporter has already commissioned an audit for a facility, the commissioning party must make the results available to other exporters "under fair economic conditions". The European Commission will maintain a register of successfully completed audits.

Both document checks and physical inspections are required as part of the audit. A third party auditor must possess appropriate qualifications, be independent from the facility and be accredited by a national authority. The criteria for facility assessments are set out in an annex to the WSR.

Recycling Europe points out that its position paper is based not only on feedback from waste management companies and recyclers across numerous sectors but also on input from competent national authorities. If the current legal and operational uncertainties surrounding the audit framework are left unaddressed, "they risk undermining compliance, disrupting trade flows, and creating significant market fragmentation, despite the willingness of operators and third-country facilities to prepare for and comply with the new requirements," said the umbrella organisation.

Warning against restrictions in the recovered paper trade

In an earlier statement, Recycling Europe had warned against possible restrictions on the export of recovered paper. Concerns have been raised in connection with political interventions including a written EU parliamentary question that increasingly view exports of recovered paper critically and portray them as a risk to Europe's industrial sovereignty. In the association's view, however, this assessment falls short. Europe's recycling system structurally generates more recovered paper than the paper industry in Europe can absorb. Exports are therefore not a problem but a necessary mechanism to keep surplus material in productive use.

Without access to international outlets, Recycling Europe says recyclers would face lower recovered paper prices, increasing stockpiling risks and reduced incentives for collection. As recycling markets are fundamentally demand-driven, restricting trade would not create additional recycling capacity in Europe. Instead, it could lead to market distortions, discourage investment and weaken the competitiveness of European recyclers.

At the same time, the association points out that exports of recovered paper are already subject to strict EU regulation. With the revised WSR, requirements for monitoring, traceability and compliance have been tightened further. Before introducing additional restrictions, Recycling Europe argues that the effects of the revised Regulation on trade flows and market conditions should first be assessed.

Spanish folding carton industry slightly increases output in 2025 while turnover remains broadly stable

 **EUWID** + 25 March 2026 |  ~ 2 min | [Published in issue 13/2026](#)

Against the backdrop of a complex economic environment, Spain's folding carton industry managed to slightly expand output in 2025, while sales stayed broadly stable. While total production increased slightly (+1.8 per cent) to 525,918 tonnes, member companies' sales revenues remained mostly stable at €1.28bn (+0.6 per cent) in 2024, according to figures released by the association of folding carton manufacturers and carton converters Aspack (Asociación Española de Fabricantes de Envases, Embalajes y Transformados de Cartón).

"The folding carton sector has demonstrated a high degree of adaptability in a complex economic environment, maintaining growth and strengthening its industrial competitiveness," said Aspack president Josep María Berga.

Industry data from a benchmarking study covering the years 2021-2024 also showed a clear improvement in corporate profitability, with the sector's Ebitda margin reaching 11.2 per cent in 2024, according to Aspack.

The development in the Spanish folding cartons industry is closely linked to the consumer goods industry, particularly the food sector, the association writes. Food applications account for 51 per cent of sector sales revenues, compared with 49 per cent generated in segments such as pharmaceuticals, cosmetics, personal care and textiles. Within food packaging, fresh and frozen products (29 per cent) represent the largest share, followed by beverages (21 per cent), cereal products (16 per cent) and confectionery (16 per cent).

"Cartonboard is increasingly emerging as one of the key materials in the shift towards more sustainable packaging. A growing number of brands are choosing recyclable solutions with a lower environmental footprint," Mr Berga said.

The study also reflects a polarised industry structure, with a large number of small producers but sales revenues concentrated among a limited group of companies: 56 per cent of Spanish carton makers generated annual sales of less than €10m, 70 per cent of total sales are generated by 29 companies, while 16 companies account for half of overall business.

Larger players are continuing to gain weight within the sector. Companies with more than 50 employees account for 83 per cent of total sales, underlining the ongoing shift towards more efficient industrial structures with stronger investment capacity.

Aspack further reports that forecasts point to moderate growth for the sector in the coming years, mostly driven by the expansion

of e-commerce, rising demand for more sustainable packaging solutions and the substitution of less recyclable materials.

The Spanish folding carton industry comprises around 90 companies employing approximately 7,000 people. In addition to numerous smaller producers, Aspack's membership also includes internationally active groups such as Graphic Packaging, DS Smith, Saica Pack and Mayr-Melnhof.

EU-Mercosur deal to apply provisionally from 1 May

 **EUWID +** 25 March 2026 |  ~ 1 min | [Published in issue 13/2026](#)

The European Union has taken the final procedural step required to enable the provisional application of the EU-Mercosur interim Trade Agreement (ITA). The European Commission has notified the Mercosur countries of the instrument of provisional application by sending a formal note to Paraguay, the legal depositary of the bloc's treaties.

The agreement is set to apply provisionally from 1 May 2026 between the EU and all Mercosur countries that complete their national ratification procedures and formally notify the EU by the end of March. Argentina, Brazil and Uruguay have already finalised this process. Paraguay has also ratified the accord and is expected to submit its notification shortly.

The European Commission says that provisional application will allow tariffs on selected goods to be eliminated from the first day of implementation. The arrangement is to create more predictable conditions for trade and investment and enable European exporters, consumers and agricultural producers to benefit from improved market access while sensitive sectors of the EU economy remain protected through safeguard mechanisms.

Uncertainty increases during current price round in the market for native starch

Q1 prices decrease substantially / Iran war puts pressure into Q2 negotiations

 **EUWID** + 25 March 2026 | 🕒 ~ 4 min | [Published in issue 13/2026](#)

Observers in the market for native starch report that there is high volatility in the pricing round for the second quarter of 2026. Even before the current energy crisis, manufacturers were exposed to persistently burdensome costs. Negotiations for deliveries from April were nevertheless dominated by price pressure. In particular, suppliers saw little chance of realising price increases for native wheat starch, but also for native corn and potato starch. The paper industry negotiated hard and continued to push for the lowest prices.

Two weeks ago there was still a trend in the market towards a rollover of already low prices from the first quarter for native wheat starch along with some talk of slight increases of €5-10/t while retaining existing contract mechanisms.

However, the Iran war has created a new situation that could call into question the results of the pricing round. Several starch manufacturers now want to review price increases or separate surcharges. Industry insiders report that there is extreme pressure and uncertainty in the market for native wheat starch, which could impact prices.

Past price round brings starch factories to tipping point

The starch industry suffered a serious blow in the pricing round for the first quarter of 2026. Native wheat starch prices saw substantial cuts ranging from €20/t to €30/t at the upper end of the price frame. Most quotes for larger quantities slipped noticeably below the €400/t mark. Prices of contested contracts also slipped below €380/t in the first three months of the year.

Only for medium and smaller volumes and in some regions of Western and Southern Europe are quotations said to have been noticeably above €400/t. Market experts identified a narrow price frame for Germany and neighbouring regions in the first quarter.

Native corn starch prices were more stable, although its use in the paper industry in the DACH region has decreased. In some segments, and especially in Southern Europe, the product retains its usual importance.

Potato starch continues to be in little demand in the paper industry and its price is also significantly weaker since the last harvest. Longer-term contracts for native potato starch amount to between €700/t and €900/t. Aggressive offers reportedly stood at around €600/t of late.

In this context, cationic potato starch, which partly sells currently for well over €1,000/t in some cases, is also coming under pressure according to market experts. Depending on the grade, players currently want prices extending to over €1,200/t.

Negotiations still running

Negotiations for starch deliveries in the second quarter had often already begun before the Iran war and are still underway in several cases at the time of going to press. While there was a prospect of a carrying forward earlier prices for native corn starch and reducing prices of native potato starch, the primary goal for native wheat starch was to get back above the €400/t mark, which met with resistance from buyers.

While the imbalance between supply and demand had previously thwarted attempts to increase the price of cereal starches, the Iran war has created a new dynamic.

The potential risks of a further escalation in the war had put large parts of the starch industry on high alert. In an already advanced stage of negotiations second quarter, premiums of €10/t to €30/t for native wheat starch have now become the focus instead of a rollover.

Starch market remains unbalanced

In the starch market there is still abundant supply, producers are fighting for virtually every order, and the market is characterised by cut-throat competition. However, suppliers seem to have found a lever for price increases. Resistance from buyers weakened in view of the predicament of starch manufacturers as well as growing determination of their demands.

Observers also see many parallels between paper mills and starch mills in this round of negotiations. Market conditions, problems and cost structures are very similar, say industry experts. For both industries, the sharp increase in energy costs in the course of the Iran war weighs heavily. Uncertainty has increased for both. Nevertheless, buyers from paper mills often drive a hard bargain for starch prices, many respondents believe.

Against this background, starch mills fear that many companies could remain in the red. After all, prices of native cereal starches have not been sufficient to operate profitably for well over a year. Raw material prices for wheat and corn had also risen recently. However, with starch prices from the first quarter and the renewed burden of expensive energy and transport, operating results of companies are deteriorating.

In order to reduce costs, regionally oriented businesses could increase, say experts in the starch industry. In this context, they also refer to the pressure to consolidate, which has already led to capacity reductions in the market. Representatives of the starch industry say that the increasing need to cover the costs would require a price increase of up to €80/t for wheat starch.

EUWID Price Watch Western Europe Native Starch			
First quarter 2026			
Prices in € per tonne	First quarter 2026		Fourth quarter 2025
Potato starch	700	- 900	800 - 950
Corn starch	410	- 445	415 - 445
Wheat starch	380	- 415	395 - 440
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Paper and board mills announce price hikes across multiple market segments in Germany

Producers of newsprint, CCM and cartonboard ask for higher prices due to rising costs

 **EUWID** + 25 March 2026 |  ~ 8 min | [Published in issue 13/2026](#)

Newsprint buyers on the German market are struggling against a wave of announced price increases. While paper mills are pointing to continued cost pressure to justify the move, customers say they do not see a sufficient basis for higher prices. As several recycled containerboard producers announce price increases across all grades, they stress that the move is primarily driven by persistent structural cost pressure rather than by the latest geopolitical tensions.

Producers of recycled containerboard have also informed customers across the board about planned price increases for all grades. Market participants note that these steps would have been taken even without the impact of the Iran war. The current increase calls therefore pricing pressures that had already been building, now reinforced by the impact of the Iran war. At the same time, price increase demands are also becoming more frequent in recycled cartonboard, affecting both GD and greyboard. Implementation strategies vary: some suppliers have announced higher prices with effect from mid-March, while others are targeting the final week of March or the start of April. By contrast, most GC producers are showing greater caution in launching increase initiatives.

Newsprint mills face resistance to planned price increases

A fresh wave of price increase announcements in the German newsprint market is encountering resistance from buyers. After isolated advance moves by individual mills, all established producers have now signalled higher prices. The planned adjustments typically amount to €20-50/t and are largely intended for implementation from the beginning of April.

Producers generally justify the move with sustained cost pressure and a recent deterioration in their cost situation, in particular with higher energy prices. Against the backdrop of the Iran war and its potential impact on energy markets, industry representatives say newsprint producers are preparing for a possible crisis scenario. Market participants report that discussions have included the possible introduction of various types of surcharges as well as a move towards shorter-term supply agreements in order to enhance flexibility and allow for quicker adjustments. At present, contracts in the German newsprint market typically run for three months, although some players had recently considered extending terms to six months.

Buyers, however, are struggling with the prospect of greater short-termism and are calling for improved planning security. While

global markets remain volatile and the outlook for the print sector is uncertain, they argue that this does not provide a sufficient basis for price increases in Germany. Some market participants note that the current spike in gas and electricity spot prices has not yet fully translated into mills' cost structures due to energy hedging and the use of refuse-derived fuel (RDF) power plants, even though further cost increases are expected. In their view, the geopolitical conflict is accelerating existing market developments rather than fundamentally justifying higher paper prices.

Opinions among buyers differ. While some expect that moderate increases for coldset and heatset newsprint may ultimately have to be accepted, others continue to reject the proposed hikes. They warn that higher paper prices could further weaken advertising demand in an already fragile economic environment and potentially trigger renewed declines in print volumes.

Structural demand trends remain challenging. Commercial print continues to be affected by digitalisation, and newspaper circulations are generally declining in line with expectations. Market sources estimate that this may translate into a further 5 to 8 per cent reduction in paper demand. Additional savings are being achieved by printing houses through format optimisation.

Against this backdrop, negotiations between publishers and paper suppliers are ongoing, with key discussions still pending at the time of writing.

Commercial printers are said to be further advanced in the current pricing round. The heatset newsprint segment has long been under scrutiny, with publishing sector representatives saying that market price levels are not adequately reflected in pricing in this segment: While specific paper requirements may justify discounts, they argue that the current gap between publisher and commercial printing prices is too wide.

Paper producers, for their part, remain confident that price increases can be implemented. They stress the need to raise so-called project prices and, more importantly, to lift average contract prices in order to restore profitability. Market observers note that all suppliers share an interest in improving earnings after a prolonged period of pressure.

Utilisation rates at paper mills have recently improved following capacity reductions. The closures of the Hainsberg and Vipap newsprint operations have tightened supply, while the future of Papresa's newsprint machine remains uncertain. Imports from overseas have also declined.

Representatives of the paper industry repeatedly report that temporary shutdowns of paper machines or reduced operating rates could curb supply of newsprint. If companies refrain from purchasing expensive gas on the spot market, production will inevitably have to be scaled back. This situation would make it even more difficult for buyers to shift potential paper volumes to alternative suppliers. Ultimately, several market observers confirm that uncertainty remains tangible on both the supplier and the customer side.

Containerboard price demands not primarily linked to Iran war, say suppliers

By mid-month, all producers of recycled containerboard grades contacted by EUWID had announced price increases of around

€100/t, intended to take effect from 1 April. Initially, it was unclear whether the paper industry was aiming to introduce temporary energy-related surcharges or permanent price adjustments. Market feedback now indicates that paper mills want to put through price increases.

Industry sources say that even without the outbreak of the Iran war – which has influenced the scale of the current price demands – the adjustment of €40/t implemented on 2 March would only have been a first step and was widely regarded as too low. A second instalment would therefore have been necessary in the near term regardless of the war and has now effectively followed.

With the latest announcement, paper producers are effectively bundling pre-existing cost pressures together with the additional burdens arising from the war into a single price increase.

In addition to the impact of rising energy costs on paper mills, recovered paper merchants have also called at short notice for so-called diesel surcharges on deliveries of the industry's key raw material. According to paper producers, these surcharges were to take effect immediately in March. As the demands from recovered paper traders emerged only after mills had already announced their own price plans, they could strengthen efforts to fully implement the €100/t increase – and may even trigger further pricing initiatives by paper manufacturers.

In the market for white-top testliner, individual producers have renewed their calls for increases currently amounting to €40/t from 1 April.

These developments coincide with unexpectedly firm demand for containerboard that has persisted for some time. According to industry sources, paper inventories in Germany have declined significantly in recent weeks, even though machines have been running at full capacity. In the past, falling stocks were typically the result of ongoing downtime. This is no longer the case and is seen as evidence of a genuine market recovery. Improved demand is being driven primarily by European markets, with some companies currently refraining from taking on additional export orders to prioritise European demand.

Cartonboard producers announce further price hikes for GD and greyboard

In the German market for cartonboard and folding cartons, buyers of recycled board are facing initial calls for price increases. As early as the second week of March, some board mills reacted to the recent surge in energy costs linked to the war in Iran by announcing plans to raise prices for both GD and greyboard.

According to information obtained by EUWID, the plans envisaged either adjustments of €70/t as early as 16 March or increases scheduled to take effect on 1 April. However, at the time of research after mid-March, there were still no clear indications that these rises had actually been implemented. At the same time, market participants consistently confirmed announcements of temporary energy-related surcharges for greyboard, although their exact level has not been specified.

According to market participants, calls for price increases for GD had not yet become broadly established at the time of research. Some market-relevant cartonboard producers initially remained cautious about putting forward their price initiatives. By the end of

the third week in March, however, a major supplier had announced increases of 10 per cent for GD with effect from 23 March.

Buyers in the folding carton industry criticised the intention to raise prices under the pretext of the war in Iran. Cartonboard producers, meanwhile, stressed the fundamental need for price adjustments, arguing that price levels had become unsustainable following the reductions implemented around the turn of the year for GD grades and greyboard. Against this backdrop, sources suggested that cartonboard manufacturers may no longer be willing to discuss further price concessions in light of higher energy costs. For March, insiders therefore reported stable prices for both GD and greyboard.

The situation in the primary fibre cartonboard market appears comparatively calmer. By the editorial deadline, only one non-integrated producer of GC had announced temporary energy surcharges of €80/t effective mid-month, causing irritation among surveyed folding carton manufacturers due to the short notice of the measure. Other GC suppliers from Scandinavia and continental Europe are currently holding back on pricing plans, according to market feedback. Buyers also pointed to contracts fixed either until the end of June or even until the end of the year.

At the same time, industry sources indicated that the previous downward price trend had at least stabilised, including in the case of quarterly contracts. Following reductions that in some instances reached three-digit levels during 2025, suppliers interviewed said they saw no further room for concessions. Against this backdrop, prices remained broadly stable in March.

Operating rates on GC board machines have recently been stable, although market contacts stop short of describing utilisation as strong. In isolated cases, slightly extended delivery times have been reported, which customers partly attribute to constrained logistics capacities.

Coreboard manufacturers in Italy preparing to raise their prices from April onwards

A quiet first quarter with stable prices

 **EUWID** + 24 March 2026 | [Valeria Buß](#) |  ~ 4 min | [Published in issue 13/2026](#)

The first quarter was initially calm on Italy’s coreboard market, with stable prices. However, the outbreak of the war in Iran and the subsequent rise in energy prices have injected some movement into the market. So far, this has mostly not fed through to coreboard prices in March, but both suppliers and buyers expect prices to rise in April.

March was a month when discussions and deliberations among Italy’s coreboard producers centred on when, and by how much, to raise selling prices in April. Manufacturers had already complained last year about high costs across many areas, including chemicals, transport, and labour. Yet weak demand left no room for mark-ups and instead forced price cuts. The surge in energy prices since the start of the war in Iran has now markedly increased the pressure to push through higher prices.

All manufacturers in Italy interviewed told EUWID that they planned to raise their coreboard prices. Since energy costs are volatile, they waited as long as possible before approaching customers. In the penultimate week of March, planned hikes ranged between €50 and €100/t for orders from 1 April. For a few suppliers, however, these amounts were not set in stone, and they reserved the right to revise them should energy prices rise further.

Some producers also attempted to raise prices as early as March, but this proved impossible for orders already on the books. A few Italian coreboard manufacturers managed to secure initial price hikes on new orders during the month. Still, most orders were placed at the beginning of the month, so only limited volumes were affected. In general, manufacturers plan not to label the higher charges from April as an energy surcharge, but to build them into sales prices, arguing that not only energy but many other cost items have risen, as well.

EUWID Price Watch Italy Coreboard									
First quarter 2026									
Prices in € per tonne ex works		First quarter 2026			Fourth quarter 2025			First quarter 2025	
Coreboard 300 J/m², ≤ 1.5 cm³/g		520 - 540			520 - 540			495 - 550	
The price bracket reflects minimum and maximum prices reported over the entire quarter.									
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Higher prices expected in April

Buyers and sellers alike anticipated that prices would, in fact, edge higher, though it was unclear when or by how much. Manufacturers underlined their resolve by saying that they would have to halt production if prices did not rise. One producer noted that manufacturing costs had already jumped by €50 per tonne produced, with others mentioning even higher sums.

However, coreboard prices did stay stable in the first quarter of 2026. The industry was emerging from a phase marked by price cuts, with prices still heading lower in the fourth quarter of 2025. Several market players said that the downward pressure on prices had eased in the new year, and buyers confirmed they had no interest in pushing prices ever lower. "We need stable prices," one of them remarked. Otherwise, they would also put core prices in jeopardy. By the outbreak of the Iran war at the latest, price reductions were out of the question.

Prices for coreboard with a ply-bond strength of 300 J/m² and a bulk of up to 1.5 m³/g were stable at €520-540/t ex works in Italy in the first quarter of 2026.

Coreboard manufacturers described the demand environment as relatively stable in the first quarter, with businesses having become accustomed to a pretty low level. A few producers were still not dissatisfied with demand. One mill was offline for several weeks of modernisation work in December and January, resulting in a slightly lower supply than usual. Otherwise, stoppages had been few and far between, sources said. A couple of manufacturers pointed out that the closure of the Julius Schulte coreboard mill in Germany had freed up some material. In March, quite a few suppliers found that a little more coreboard had been ordered here and there, something that they suspected was in expectation of higher prices in April, although this effect was short-lived.

Companies with a strong export focus, including core manufacturers, have faced higher freight rates since the outbreak of the war. One core producer reported that export costs have already risen and margins have narrowed. One coreboard producer also pointed to isolated route cancellations.

Core prices stable in Q1 as producers keep a close eye on feedstock prices

A few core manufacturers were not very pleased with their order books in the first quarter. Sales volumes were around 15 per cent lower than at the same time last year, and the situation had worsened a little even compared with the final quarter of 2025, one of them stated. Others described demand as relatively stable. One market player told EUWID that it had been able to offset the lack of demand within Italy by exporting to countries outside Europe.

Core prices remained unchanged in the first quarter. If coreboard becomes more expensive in the second quarter, core manufacturers will want to – and need to – follow suit and are planning steps to this effect. Usually, though, it was hard to pass higher feedstock prices on directly to customers. Since increases are usually implemented with a time lag, many insiders do not expect to be able to push through higher prices for cores in April.

Start-up under way at Essity's Prudhoe recycled fibre facility

23 March 2026 | [Frauke Schmidt](#) | 🕒 ~ 1 min | [Published in issue 13/2026](#)

The commissioning phase of the recycled fibre facility Unifibres at Essity's Prudhoe mill in the UK has begun, but the company has decided to postpone the site's official opening event as further optimisation work is required.



Essity manufactures tissue and a broad range of tissue-based consumer hygiene products.

A company spokesperson told EUWID that start-up activities

at the plant commenced at the beginning of last week. The machinery is already operating and fibre is being successfully recycled.

However, Essity said that minor technical issues typical for projects of this size and complexity have been identified and are currently being addressed.

Essity is now focusing on implementing the necessary improvements in the coming weeks before ramping up the installation to its full operating capability. Against this backdrop, Essity has postponed the official opening ceremony that had been scheduled for 9 April 2026.

A new date has not yet been set, as the company aims to ensure that commissioning progresses without further delays.

Tissue production at the Prudhoe mill continues unaffected by the ongoing optimisation work at the recycled fibre facility, the spokesperson said.

The new Unifibres complex replaces an older recovered paper processing plant at the site. The investment is intended to reduce Essity's reliance on market pulp and higher-grade recovered paper. Construction of the plant [started](#) in 2023.

Burgo announces further price increase citing Iran war

23 March 2026 | 🕒 ~ 1 min | [Published in issue 13/2026](#)

Italian paper producer Burgo Group has announced plans to further increase prices for its woodfree and mechanical paper ranges.

The company intends to implement an additional increase of €50/t for coated mechanical grades as well as for coated and uncoated woodfree papers, in both reels and sheets.

The adjustment is set to apply to all new orders.



The mill in Sora, Italy, is one of several Burgo production sites for graphic papers, alongside Sarego and Villorba, Italy and Virton, Belgium.

Burgo had already [announced a €50/t price rise](#) for woodfree papers in February, scheduled to take effect from 1 April.

According to the company, the latest move reflects the escalating conflict in the Middle East, which is placing significant upward pressure on energy and logistics costs as well as on various raw material inputs.

Metsä Board adopts new strategy and financial targets for 2026–2030

19 March 2026 | [Frauke Schmidt](#) | 🕒 ~ 2 min | [Published in issue 13/2026](#)

Finnish paperboard producer Metsä Board has approved a new corporate strategy and long-term financial targets for the period 2026–2030. The company said the plan reflects continued uncertainty in its operating environment and focuses on improving profitability, cost efficiency and financial stability.



The strategy will be implemented in two phases. In the first phase, Metsä Board will continue the cost-saving and profitability improvement programme launched in July 2025. The measures are intended to generate an Ebitda improvement of €200m by the end of 2028 through a streamlined cost structure and higher production efficiency. In the second phase, the company plans to concentrate on expanding its consumer packaging business.

Growth focus on consumer packaging

The updated “Lead the Pack” strategy is structured around three business areas: Consumer Packaging, Retail Packaging and Market Pulp, while financial reporting will remain at group level.

The company identified Consumer Packaging as the key growth driver. Metsä Board aims to improve its position in packaging applications for food, food service, healthcare and other fast-growing consumer goods segments. The company is targeting annual sales revenue growth of more than 4 per cent in this business, exceeding the expected market growth of around 3-4 per cent.

In Retail Packaging, the priority is to improve profitability by fully utilising existing capacity and strengthening cooperation with corrugated packaging producers and converting partners. The target market is forecast to expand at a more modest rate of 1-2 per cent annually.

Market pulp exposure to be reduced

In Market Pulp, Metsä Board aims to reduce exposure to external pulp markets and increase self-sufficiency in order to stabilise cash flow. According to Metsä Board's annual report 2025, market pulp deliveries amounted to 368,000 t, down from 400,000 t in the previous year.

The company says it has invested around €1bn in recent years to improve mill competitiveness, product quality and environmental performance. These investments have increased annual production capacity by roughly 250,000 t and reduced fossil carbon dioxide emissions by 79 per cent compared with 2018 levels. The company also reported that around 93 per cent of its energy consumption is now fossil-free.

Against this backdrop, Metsä Board plans to concentrate on extracting the full value from recently completed projects rather than embarking on major new investments during the current strategy period.

The group's financial targets for 2026-2030 include achieving comparable return on capital employed of at least 8 per cent in 2027-2028 and at least 12 per cent from 2029 onwards. Net debt to comparable Ebitda is to remain at a maximum of 2.5. The dividend policy is unchanged, with the company aiming to distribute at least half of its net result over time, subject to future investment and development needs.

Metsä Board will present further details on its strategy and financial outlook when publishing its January-March interim report on 29 April 2026.

Bianchi takes helm at FPE, calls for harmonised EU rules

19 March 2026 | 🕒 ~ 1 min | [Published in issue 13/2026](#)

Michele Bianchi, CEO of RDM Group, has been appointed President of Fibre Packaging Europe (FPE), the coalition that brings together seven European trade associations representing the entire fibre-based packaging value chain.



Bianchi takes helm at Fibre Packaging Europe, stresses need for harmonised EU rules

“As FPE’s new president, I take office with a clear conviction:

We must now focus on policies that strengthen our European industry. With this in mind and in the context of the roadmap on ‘[One Europe – One Market](#)’ to be presented by the European Commission to EU leaders, FPE asks to consistently embed competitiveness and Single Market considerations across all EU policies and supportive initiatives,” Mr Bianchi stated.

The organisation warned that fragmented national rules and regulatory uncertainty could weaken Europe’s industrial base and hinder investment in low-carbon production. While supporting the EU’s sustainability agenda, including circular economy and climate initiatives, FPE stressed that harmonised rules are essential to ensure the efficient movement of goods across the internal market. FPE also called for stronger measures to improve recycling performance, such as mandatory national targets for separate municipal waste collection.

This article was updated on 24 March 2026.

Solidus plans to hike prices from 1 April

19 March 2026 | 🕒 ~ 1 min | [Published in issue 13/2026](#)

Solidus is to implement a price increase of 7 to 10 per cent, effective 1 April 2026.

The increase will apply to the company's entire portfolio of coreboard, greyboard, solidboard, as well as all converted products, including packaging, cores and tubes, partitions, and edge protectors.



Niels Flierman, CEO of Solidus, explains: "Rising costs in energy, lining papers, transport and other inputs make this adjustment unavoidable. As a leading paperboard and packaging producer, this increase ensures we can continue to deliver the quality, service, and reliability our customers expect from us."

Navigator announces plans to increase prices for uncoated woodfree paper

19 March 2026 | 🕒 ~ 1 min | [Published in issue 13/2026](#)

The Navigator Company has announced plans to increase prices for uncoated woodfree paper by 4 to 7 per cent in Europe.



The new prices are to be implemented for deliveries from 6 April 2026. The upper range of the planned increase will apply to entry-level grades, the company announced.

With this price increase, Navigator reacts to the ongoing and significant increase in key cost components, which is putting strain on the paper industry's overall cost structure.

"Given the current disruption in the energy sector and the likely disruptions to supply chains and logistics, particularly as a result of the conflict in the Middle East, further price increases for paper and packaging may soon be necessary to offset rising production costs," the company wrote.

Sofidel to install its new US tissue machine at Inola mill

19 March 2026 | [Valeria Buß](#) | 🕒 ~ 1 min | [Published in issue 13/2026](#)

Italian sanitary products manufacturer Sofidel has specified its expansion plans in the USA and has announced where it plans to install its new tissue machine.



The company reported that the expansion, which was announced in October last year, will take place at its integrated facility in Inola, Oklahoma.

The Inola site already houses two tissue machines with a capacity of 60,000 tpy each and 14 converting lines. The new Through-Air-Drying (TAD) tissue machine will have a capacity of 75,000 tpy and be installed in a building that will be newly constructed. Sofidel also plans to install new converting lines with matching capacity for the production of finished goods. The project also includes the expansion of the pulp and parent reel warehouse, and the construction of a fully automated finished goods warehouse.

Sofidel puts the total investment amount for the project at \$775m. The new machine is scheduled for start-up in the second quarter of 2028.

Sofidel has been expanding heavily in the United States in recent years. Last year, the company acquired four Royal Paper facilities in Arizona and South Carolina and started up a [new tissue machine at the mill in Circleville](#), Ohio. Today, Sofidel operates 14 production sites across eleven US states.

Sofidel entered the US market in 2012 and says it has since become the fourth largest producer for tissue products in the North American market. This market now accounts for 50 per cent of the company's total revenue.

