Collective Agreement Reached in Finland's Paper Industry

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The Finnish Paperworkers' Union Paperiliitto and the association of companies in Finland's forest-based sector Metsateollisuus have reached a collective agreement which will be valid until 31 March 2028.



The agreement outlines an 8.2 per cent wage increase over the three-year period. These adjustments also extend to shift and other contractual bonuses, ensuring a consistent rise in compensation across various types of work arrangements. Importantly, the agreement contains no textual weakening of existing terms, signalling continuity and stability in working conditions for employees in the processing sector.

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EU approves Novolex and Pactiv Evergreen deal

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The European Commission has approved, under the EU Merger Regulation, the acquisition of joint control of Novolex and Pactiv Evergreen by Apollo Capital Management and Canada Pension Plan Investment Board (CPP Investments). Other regulatory approvals pending, the deal is expected to close by mid-2025.

Once completed, Pactiv Evergreen will become a privately held company and will be delisted from Nasdaq.

At the end of 2024, Novolex and Pactiv Evergreen announced their merger, forming one of the largest and most diverse packaging manufacturers in North America. The deal is valued at $6.7bn.

The combined company will operate under the leadership of Stan Bikulege, Chairman and CEO of Novolex. The transaction is backed by Apollo Global Management, the majority owner of Novolex, and CPP Investments, which will invest approximately $1bn and become a significant minority shareholder in the new business.

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ND Paper to add containerboard capacity at US Biron mill

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ND Paper, the US subsidiary of Chinese group Nine Dragons Paper, will raise containerboard capacity at its Biron mill in Wisconsin. The company announced that it would revive PM 25 which was idled in April 2024. The machine is expected to start up in the second half of 2025.

ND Paper reports that PM 25 can produce recycled containerboard and kraft papers. According to earlier information, it has a capacity of roughly 245,000 metric tonnes (270,000 sh.t) annually. ND Paper adds that it has also built two new recycling facilities in Biron.

ND Paper acquired the Biron mill from Catalyst Paper in 2018 and switched PM 25, which formerly produced LWC, to produce containerboard grades. This marked the company's entry into the US containerboard market. PM 26 at the mill was subsequently also switched from LWC to recycled containerboard and commenced operation in 2022.

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NCPM adds new tissue output capacity

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Russian company Naberezhnye Chelny Paper Mill (NCPM) will build a new tissue production plant. Construction of the plant at the mill in Kazan will begin in 2026. Though the mill project is still in the development phase, negotiations with equipment suppliers and construction firms have commenced, NCPM informs.

NCPM is poised to commission a converting plant for three-ply toilet paper and paper towels. The company's primary aim is to diversify its toilet paper offerings. The new 70,000 tpy primary-fibre tissue mill project is aimed at supplying tissue paper to the converting plants.

Mechanical pulp capacity will also be added. Likewise, recovered paper converting capacity at the plant will be increased.

The company's output of board and paper increased last year by 17 per cent or 205,000 t, and corrugated packaging by 11 per cent or 345 million m², but output of sanitary paper and hygiene products dipped by 2 per cent or 410 million units.

At a meeting with the state committee at the ministry of trade and commerce of the Republic of Tatarstan, the company reported about its status on expansion, automation and robot applications in production. The mill reportedly uses 58 robots, and its headcount has fallen in the last 10 years by 109 even as production volumes have reportedly increased.

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Forest-Travel plans to build a new pulp mill in Karelia

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Suoyarvi in Karelia is slated to get a new pulp mill which will process locally available birch and aspen wood. The invest project will be implemented by Karelian company Forest-Travel. The investment volume will amount to RUB3bn, the administration of the Karelian Republic informs.

The project plan involves realising production capacity for up to 200 t/day of bleached chemi-thermomechanical pulp (CTMP). The pulp mill will generate 100 jobs in the Suoyarvi district.

Abundant birch and aspen wood resources to produce hardwood pulp are available in the Northwestern Federal District, say the project description. Construction of the new pulp mill will start this year. The pulp mill with a captive power plant will be built adjacent to the existing Suoyarvi sawmill, for which Forest-Travel has already undertaken extensive modernisation measures, it is learnt. The company reportedly presented the investment plan for the sawmill in 2021 with implementation to be completed in 2025. Investment in the sawmill will exceed RUB249m. In 2024, timber output from the Suoyarvi sawmill was 5.5 per cent higher than in 2023.

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Italy's De Luca acquires idled Cartiera di Rivignano paper mill

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Paper processing company De Luca Industria Grafica e Cartaria (De Luca) has announced the takeover of the idle specialty paper mill Cartiera di Rivignano in mid-March. The company did not not provide additional details about the takeover and the planned further development of the paper mill site or start-up of the activities.

De Luca employs 30 people and operates a 20,000-m²-processing plant at its headquarters in Salerno for the production of coated packaging and wrapping paper for application in the food and other industries. The company puts its processing capacity at 30,000 tpy. In 2023, De Luca Industria Grafica e Cartaria had achieved a turnover of €40m, the company announced.

Cartiera di Rivignano was a manufacturer of flexible packaging papers for direct food contact, including glassine paper. The company ceased production in May 2022 and filed for bankruptcy in July of the same year. High raw material costs and a lack of orders were cited as the main reasons.

At its paper mill in Rivignano Teor in the northern Italian province of Udine, Cartiera di Rivignano employed 40 people, operating one paper machine and a finishing departement. According to the documents of the relevant authorities, the maximum approved production capacity was 20,000 tpy.

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Lucart to install new tissue converting line in France

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Italian tissue products manufacturer Lucart is increasing its converting capacities in France. The company announced that, due to strong demand in the segment, it would install a new tissue converting line at its Laval-sur-Vologne tissue plant in eastern France. The line will reportedly produce folded hand towels and increase the site's annual capacity by more than 6,000 t, creating five new job positions. The installation of the line, which is the tenth converting line in Laval-sur-Vologne, is scheduled for autumn this year. The company also plans to install a new system to optimise the production process. Overall, several millions of euros are to be invested, Lucart says.

Currently, the Laval-sur-Vologne site operates nine tissue converting lines as well as two tissue paper machines, which have a combined capacity of 100,000 tpy of tissue paper. In 2021, the company had announced a major investment package totalling €80m for the 2022-2024 period. This included the installation of three new converting lines and a new tissue machine at the site, amongst others.

The tissue products at the Laval-sur-Vologne mill are based 100 per cent on recovered paper. Lucart processes, amongst others, used beverage cartons to produce recycled fibre for tissue production and works together with Tetra Pak in this segment. This material is known as Fiberpack.

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Eren Paper receives permission to build CHP plant, buys Diamond Box

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Eren Paper, the British subsidiary of the Turkish packaging manufacturer Modern Karton, has received permission from the Welsh government to build a combined heat and power (CHP) plant with a capacity of 69 MW at its site in Shotton, North Wales.

The company is currently installing a machine for recycled containerboard with a capacity of 750,000 tpy and a tissue machine that can produce up to 67,000 tpy. The new CHP will enable the company to generate energy more efficiently, the company said.

Experts say that the construction of the plant is a prerequisite for the commissioning of the paper machines, which is scheduled for the end of 2025.

In addition, Eren Paper is strengthening its integration in the UK. After the acquisition of Onboard in January 2025, Eren bought Birmingham-based corrugated packaging manufacturer Diamond Box in February.

Diamond Box was founded in 2007 by Kavi and Rani Jundu and has since become a leading supplier of packaging for the e-commerce and retail sectors, as well as heavy-duty packaging. The company has 160 employees and produces approximately 2 million packages per week.

In 2023, the company generated a turnover of £43 million and a profit of £2 million.

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Metsä Mänttä mill closes one TM and exits recycled tissue

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Metsä Tissue, a Metsä Group subsidiary, plans to decommission one tissue paper machine and discontinue production of recycled fibre-based tissue at the Mänttä paper mill in Finland. The decision was part of Metsä Tissue's strategy aimed at increasing use of locally sourced forest raw materials and focusing production on primary fibre-based products, the company explained.

The closure of the TM will result in a loss of up to 35 jobs at the Mänttä mill. Metsä Tissue has already initiated change negotiations at the Mänttä site, covering 331 employees working for the mill's tissue segment. The employees of the greaseproof paper business at the Mänttä mill are not included in the scope of the planned negotiations, according to the company.

At the Mänttä mill, Metsä Tissue currently operates three tissue machines, one paper machine for greaseproof paper production and ten tissue converting lines. The mill has a staff of 496 people and features a total production capacity of 100,000 tpy.

Metsä Tissue also plans to create five new positions at the Mänttä mill in near future. As a part of the earlier announced €100m investment programme for the Mänttä mill, the company will install a new converting line for the production of hand towels that is expected to become operational in 2026. In addition, a new water circulation systems of the two remaining tissue machine will be installed, according to the company.

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Södra Cell modernises in Mörrum with ABB

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Södra Cell, the pulp division of Sweden' forestry and forest products group Södra, will implement **ABB**'s technology to optimise the bleaching processes on one of the two production lines at the Mörrum pulp mill. The project follows the successful implementation of ABB solutions for the bleaching and cooking processes at Södra Cell's pulp mill in Mönsterås and for the bleaching process at its plant in Värö, according to ABB.

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Rottneros downsizes management

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As part of the ongoing downsizing process, which will result in 47 redundancies across the company, Sweden's pulp company **Rottneros** is also reducing the group's management. Sofia Hidén, managing director (MD) of Rottneros Mill and Anders Persson, Director Strategic Development, are leaving Rottneros. Nils Hauri, currently Director of Innovation and Strategic Projects, will become the new MD of Rottneros Mill with special responsibility for the innovation area. HR and Communications Director Ida Mörtsell, who is currently acting managing director of Vallvik Mill, will become MD Vallvik Mill. She will also continue to be responsible for strategic HR issues, the company said.

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Decor paper buyers expect prices to remain generally unchanged in April

Some producers proposing price increases of up to 10 per cent

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The flooding-related production suspension in mid-September 2024 at the Rudawa mill of Polish Kronospan Group company Malta-Decor, the closure of the Penig mill of Felix Schoeller and the anti-dumping duties on decor paper imports from China introduced provisionally by the EU Commission with effect from 15 February have so far had little impact on volumes traded on European decor paper markets. Following significantly extended downtime in the fourth quarter of 2024 and into the first days of 2025, European decor paper producers have in most cases resumed relatively continuous production since starting up again in the first half of January. Over recent weeks, there have been just a few market-related shutdowns, with individual machines being taken out of production for up to seven days. One producer intends to shut down a machine temporarily over the coming weeks in order to implement a planned rebuild.

The next major production adjustments are therefore scheduled for the second half of April, during the Easter holidays. Most companies have not yet committed to a specific procedure and intend to decide quite spontaneously based on further development of incoming orders. At least one company, however, has decided that the paper machines are to be shut down for a period of four days to one week.

Demand for decor paper has also remained rather subdued in recent weeks, with various producers reporting no sign of a significant upturn. Most processors from the wood-based panels industry as well as the printing and impregnation sectors also perceive little change at present. A few companies report that they are now actually slightly busier, meaning they are also able to operate again with a slightly longer lead time. However, this improvement is attributed to shifts in market share between the individual producers rather than to a market revival. The change in overall demand on the European decor paper markets is therefore only minimal.

The supply situation is described as not being critical by almost all processors, with producers still able to deliver relatively quickly, even in the event of requests for additional volumes. Converters also remain relatively unperturbed by the prospect of a potentially sharper decline in decor paper imports from China, which are now subject to provisional anti-dumping duties, especially as Chinese producers may be prepared to make price concessions.

Despite continued unsatisfactory capacity utilisation and existing capacity reserves, various decor paper producers have been discussing with their customers a possible price increase for production from April onwards, though in many cases no specific demands have been made. Only one company mentioned a markup of up to 10 per cent in a statement issued on 10 March. In

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the opinion of decor paper processors, however, such demands cannot be justified by costs, even though pulp prices have risen again slightly since January. There has been little change concerning titanium dioxide prices. According to converters, very few specific increases have been implemented as yet; most companies therefore expect prices to remain at the most recently agreed levels, at least for April.

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German paper sack industry grew slightly in 2024 despite economic uncertainty

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Germany's paper sack industry enjoyed a stable development in 2024. On balance, Gemeinschaft Papiersackindustrie (Gempsi), the German association of paper sack manufacturers, arrives at 1.1 per cent growth in the number of paper sacks delivered compared to 2023. This marks a slight improvement for the industry, following a 22.6 per cent slump in deliveries in 2023. Compared to the economic development seen in the previous year, demand recovered slightly in 2024, reported Gempsi in its industry barometer published at the end of March.

2024 saw a rise in demand for paper sacks in the areas of construction materials (without cement), chemicals, food (without milk powder), animal feed and minerals. In contrast, in the areas of cement, milk powder and seeds, demand turned out to be less vivid, according to Gempsi.

Backlog effects resulting from destocking undertaken by customers of the association's member companies in 2023 led to a revival of demand. However, paper sack industry in Germany was under high cost pressure in 2024 – above all due to rising prices of paper, energy and raw materials as well as regulatory requirements and higher wage costs.

Cautiously optimistic 2025 outlook as many segments are believed to have bottomed out

As far as the current year is concerned, the German paper sack industry's expectations are cautiously optimistic. The general assessment of business for 2025 is satisfactory overall. However, the prognoses can differ widely: while a number member companies prognosticate sales growth or a slight decline in demand, the majority expects constant demand.

Furthermore, the association reported that the negative downward trend was broken in many segments in the first quarter of 2025. For example, the cement industry is said to expect that production will remain at the previous year's level in 2025. A similar development is also reported to be expected for volumes packed in paper sacks. According to customer statements, stable sales are a realistic option in the food and animal feed industries, too.

PPWR and EUDR are regulatory challenges facing the industry

At the same time, the industry is preparing itself for the implementation of new regulatory requirements defined by the EU that will impact the development of business – be it the EU Packaging and Packaging Waste Regulation (PPWR) or the EU Regulation on Deforestation-free Products (EUDR).

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Gempsi reports that as an example, the association's member companies expect the PPWR to cause a substantial increase in the required volume of information, consulting and administrative efforts. Moreover, many requirements still need to be laid down in more precise terms through delegated acts.

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Erratic reports of first quarter price hikes for sack kraft paper across Europe

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Implementation of the price hikes announced for sack kraft paper in the first quarter of 2025 presented a nuanced and variegated picture at the end of March. Paper mills announced hikes for unbleached (brown) as well as bleached (white) sack kraft paper at the end of last year citing increased costs for energy, pulpwood and pulp. Interviews conducted by EUWID with players from both sides of the market at the end of March, there were initial signs of a trend towards rising prices for bleached and unbleached sack kraft paper grades. However, the information on the extent of the surcharges and the implementation dates varies.

Sales prices quoted for both grades are seen to be either stable or marginally lower for small volumes or else they reflect hikes already accepted at the start of the year. In some cases, price increases are also to be negotiated in two steps, starting either in January or April. However, the majority of industry insiders contacted by EUWID reported a sideways movement for both qualities in the first quarter.

That said, southern European paper sack producers indicate having already accepted mark-ups in the range of €40-50/t for brown sack kraft paper and €50-60/t for white grades in some cases. At the same time, some paper suppliers report largely unchanged prices on the Italian sack kraft paper market in the first quarter of the year.

On the German market in contrast, buyers have reportedly warded off price hikes for the first quarter citing muted economic development and low demand for paper sacks. “The market was not forthcoming,” several insiders said. However, negotiations for the second quarter have already started in these cases.

Sack kraft paper mills surveyed by EUWID reported good capacity utilisation at paper machines and operating loads are said to be healthy, resulting in slightly extended lead times from certain mills. Availability of paper, however, poses no problems, according to market reports. Even the permanent closure of Mondi’s Stambolijski paper mill in Bulgaria has not created any shortages.

The trend towards improving demand for paper producers is said to be fuelled mainly by e-commerce and overseas exports. Buyers from Germany, France and Eastern Europe by comparison are said to be relatively more cautious about placing orders, suppliers explain. Reports especially indicate a noticeable rebound in southern Europe. In UK, the situation is said to be largely normal.

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Paper sack producers forecast that demand for packaging will improve following the pattern typical for the season. EUWID respondents spoke of higher order inflow in March but it was still not accompanied by corresponding call-ins from end-users. Orders from the food and pet food segments is reportedly stable across regions. Particularly in Germany, the crisis in the construction industry is felt, as reflected in lower demand for cement and industrial sacks.

EUWID Price Watch Europe Sack Kraft Paper
First quarter 2025

Prices in € per tonne	First quarter 2025	Fourth quarter 2024	First quarter 2024
Sack kraft paper, brown, 70- 90 g, semi-extensible	870 - 1,030[1)]	870 - 1,030	830 - 950
Sack kraft paper, white, 70-90 g, semi-extensible	1,150 - 1,350[1)]	1,150 - 1,350	1,050 - 1,250

[1)] Price increases for individual orders became already effectve in the first quarter.

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Germany: Label paper producers demand higher prices for second quarter deliveries

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Compared to the very brisk months of last year's first quarter, the first quarter of 2025 has been a rather slow-moving affair for players in the German label paper market. Operating loads were not bad in general but capacity utilisation definitely had "some room at the top," it is learnt. One paper producer spoke of a "healthy order backlog" extending to a month – "healthy" because a larger backlog might encourage printing companies to stock too much paper which could in turn cause demand to plummet abruptly as it did in the second half of 2024.

Talking to EUWID, converters spoke of weak demand in the first quarter of the year, especially from food and beverage industry customers. The market reportedly started the year on a quiet note as in the previous year. "There is little sign of the upturn that should normally be evident three weeks before Easter," a label printer said.

At the end of March, delivery periods for label paper are widely reported at 3 to 4 weeks, occasionally shorter or longer. By way of comparison: delivery periods touched 6-8 weeks in the first quarter of 2024.

Despite the relatively quiet market, label paper producers find themselves forced to announce higher prices for the second quarter. The price hikes are meant to apply from 1 April and range between 5-7 per cent and 7-8 per cent respectively for wet strength and non-wet strength paper, depending on the supplier. One paper producer is asking €80/t more for wet-strength and €60/t for non-wet strength paper. Another paper mill is asking for 8 per cent more for both but from 15 April. Paper mills generally underpin their demands citing increased energy, chemicals and raw material costs, especially for pulp. Paper producers expect pulp prices to continue to rise.

At the end of March, negotiations between paper mills and printing companies for the second quarter had not been entirely concluded. Paper industry sources spoke of tough negotiations which have often thwarted full implementation of the asking hikes. It is also learnt that label producers do not always present a unified front to implement the industry's demands.

Statements from the market regarding price developments in the first quarter of 2025 are not consistent. There is frequent talk of a price reduction of €50-60/t for both wet and alkali-resistant label papers and for non-wet-strength grades compared to the fourth quarter of 2024. Some label producers and converters also reported label paper prices being rolled over from Q4.

Similar inconsistent reports are heard with respect to prices of recycled label papers. Although the segment has lost its significance for several market observers, others take a different view. Some breweries for example, including renowned brands, have recently informed about switching to recycled paper for bottle labels.

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EUWID Price Watch Germany Label Paper

First quarter 2025

Prices in € per tonne free delivered	First quarter 2025	Fourth quarter 2024	First quarter 2024
Wet-strength and alkali-resistant 70-80 g (reels)	2,250 - 2,330	2,250 - 2,380	2,070 - 2,240
Non wet-strength 70-100 g (reels)	2,010 - 2,120	2,010 - 2,170	1,910 - 2,100

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Printing market climate better, expectations mostly negative

Statistical snapshot Germany

EUWID + 02 April 2025 | ~ 2 min | Published in issue 14/2025

The seasonally adjusted business climate in the German print and media industry improved for the second consecutive month in March 2025. While the business outlook in March for the next six months indicates a positive change in trend, assessment metrics of the current business situation receded slightly.

The business climate index reported by the German print and media industry association (Bvdm) shows an adjusted month-on-month improvement by 1 per cent. At 88.5 points, the index in March stands around 5.8 per cent higher year-on-year.

However, print and media industry decision makers surveyed by ifo Institute assessed their current business situation in March 2025 as being worse than in the previous month. In March 2025, the seasonally adjusted business situation index suffered a setback compared with February. At 83.9 points, the index stood roughly 2 per cent lower than in the previous month. Last year's figure for March was therefore 4.8 per cent higher than for the same month this year and around 1.4 per cent higher than the mean for the year.

Despite the fall, assessments of the current order backlog in March show an improvement: majority net responses are still negative at -35 percentage points but are 20 percentage points higher year-on-year. Net responses on seasonal demand development are likewise higher year-on-year by around 10 percentage points at plus 11 per cent thanks to the season.

After stagnating in the previous month, the business outlook of print and media companies for the next six months is positive in March. The seasonally adjusted index for business expectations improved month-on-month by 4 per cent. At 93.3 points, the business expectation index stands around 6.9 per cent higher than the level for the same month of the previous year. Around 71 per cent of companies expect stable business development for the next six months while 22 per cent expect deterioration and 7 per cent improvement. Net responses on business expectations are still negative at -14 percentage points. The net assessment of anticipated operating loads is still mostly negative at -19 per cent, around 2 percentage points lower than for the same month of the previous year.

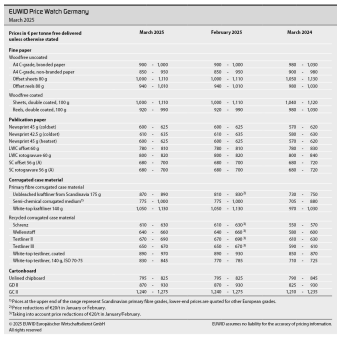
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Germany: Paper mills feel compelled to raise prices in response to high costs

Price increases a topic in many market segments

EUWID + 02 April 2025 | ~ 8 min | Published in issue 14/2025



EUWID Price Watch Germany
March 2025

Prices in € per tonne free delivered unless otherwise stated	March 2025	February 2025	March 2024
Fine paper			
Woodfree uncoated			
A4 Copier, branded paper	980 - 1,080	980 - 1,080	980 - 1,090
A4 Copier, non-branded paper	890 - 950	890 - 990	900 - 980
Offset sheets 80 g	1,090 - 1,170	1,090 - 1,170	1,050 - 1,230
Offset reels 80 g	940 - 1,010	940 - 1,010	900 - 1,030
Woodfree coated			
Sheets, double-coated, 130 g	1,030 - 1,110	1,030 - 1,110	1,040 - 1,220
Reels, double-coated, 100 g	920 - 990	920 - 990	900 - 1,050
Publication paper			
Newsprint 45 g (solid)	600 - 625	600 - 625	570 - 620
Newsprint 42.5 g (solid)	610 - 625	610 - 625	580 - 630
Newsprint 45 g (market)	600 - 625	600 - 625	570 - 620
LWC offset 60 g	780 - 830	780 - 830	760 - 840
LWC rotogravure 40 g	840 - 860	840 - 860	800 - 840
SC offset 56 g (A)	680 - 700	680 - 700	680 - 720
SC rotogravure 56 g (A)	680 - 700	680 - 700	680 - 720
Corrugated case material			
Primary fibre corrugated case material			
Unbleached kraftliner from Scandinavia 175 g	870 - 990	810 - 930[1]	730 - 750
Semi-chemical corrugated medium[2]	770 - 1,060	775 - 1,000	700 - 880
White-top kraftliner 140 g	1,090 - 1,130	1,050 - 1,130	970 - 1,030
Recycled corrugated case material			
Schrenz	630 - 630	630 - 630[3]	550 - 570
Wellenstoff	640 - 660	640 - 660 [3]	580 - 600
Testliner II	670 - 690	670 - 690 [3]	610 - 630
Testliner III	680 - 670	680 - 670 [3]	590 - 610
White-top testliner, coated	890 - 910	890 - 910	850 - 870
White-top testliner, 140 g, ISO 70-75	800 - 845	770 - 785	710 - 725
Cartonboard			
Unlined chipboard	795 - 825	795 - 825	790 - 840
GD II	870 - 930	870 - 930	825 - 930
GC II	1,240 - 1,275	1,240 - 1,275	1,210 - 1,235

[1] Price at the upper end of the range represent Scandinavian primary fibre grades, lower-end prices are quoted for other European grades.
[2] Price reductions of €20/t in January or February.
[3] Taking into account price reductions of €20/t in January/February.

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Despite a less-than-satisfactory order situation, many segments of the paper and packaging industry in Germany are talking about price increases. In the fine paper market, several mills want to launch a new attempt during April. In the latest price round for publication paper, producers have been stressing the urgent need to improve margins. In both of these markets, oversupply and declining demand are making it difficult to implement mark-ups.

Players in the kraftliner market describe activity levels in the first three months of the year as good and definitely better than in the recycled segment, which they say lends support to their pricing plans.

According to statistics from the association Die Papierindustrie, total deliveries of graphic paper by German producers in the first two months of 2025 declined by 11.9 per cent to 618,702 t, while domestic deliveries fell sharply by 19.3 per cent to 307,381 t. By contrast, the market for paper, board and corrugated board for packaging applications, saw a 2.9 per cent increase in deliveries to 2.181 million t, while domestic deliveries rose by 1.2 per cent to 936,000 t.

Fine paper price hikes announced for April

Buyers of woodfree coated and uncoated paper have recently been confronted with price hike announcements. The targeted price increases amount to between 5-10 per cent or €40-50 and are set to take effect during the month of April. However, customers say they have not yet heard many specific details since the announcements were made. It was apparently confirmed that existing contracts will not be renegotiated – and it seems there are numerous deals that are valid beyond April. Observers therefore expect that April will be a month of transition, especially since some buyers apparently stocked up on paper at unchanged or even reduced prices in advance of the price increase.

For their part, producers stress they will not simply extend the old prices. All producers are facing a tough financial situation due to steadily rising costs, especially for pulp: Producers insist they need to implement higher prices in April, or else there is a risk that the price hike will be eaten by rising costs.

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Yet, some buyers report that the price hikes have already been “quietly” postponed until May in some cases. However, some respondents also have the impression that the increase is well-prepared and production has been adjusted to the market situation. Production cutbacks have reportedly resulted in longer delivery times and thus created a foundation for the cost-driven price adjustments. Suppliers confirm there is less price flexibility and buyers who place orders today cannot expect to still receive goods at the old prices. Nevertheless, the price increases are expected to be cosmetic at most, especially as buyers see it primarily as a means to stabilise prices and note that not all producers are pursuing it rigorously.

Despite various machine downtimes, it was still possible to source paper on short notice on the German market in March, some sources said. Paper mills’ order intake remained below the desired levels and customers were reportedly able to find sufficient supply alternatives while delays were only reported for specialty grades. In general, prices were stable in March and many customers claim to have purchased for April at unchanged prices as well.

Printing companies continue to report slow incoming orders, despite a marginal spring rebound and a slightly higher need for paper. Others, however, say the order situation remains unsatisfactory.

The market for school supplies remains steady with low volatility and the same is true for demand from this segment. The calendar business is weaker, with book calendars in particular becoming less popular.

Competition has become more intense in the paper merchant business in Germany, which was already struggling recently. Merchants are offering low prices in order to either to secure their market share or (re-)position themselves and score volumes that are now up for grabs.

At the end of 2024, Japan Pulp and Paper Co., Ltd. (JPP) had acquired the business of the insolvent Inapa Deutschland and renamed it OVOL Papier Deutschland. The company underlines its commitment to German customers and reportedly wants to expand its footprint in the German market.

In February 2025, Austrian merchant Europapier also expanded into Germany with establishment of a new subsidiary, Europapier Deutschland.

Price round for publication paper amidst tension in both sides of market

The market for LWC and SC paper continues to be in a state of flux in Germany. Order activity picked up slightly in March. Prior to that, only a few paper mills had been satisfied with their capacity utilisation at the beginning of the year, according to several players. Oversupply continues to shape the market and competition between suppliers remains fierce. In the current price round, buyers therefore quickly put up resistance to the scattered calls for price increases from producers of coated and uncoated magazine papers, according to industry insiders. Citing generally rising costs and especially the limited availability and expense of raw materials are not sufficient grounds to justify mark-ups, observers say.

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Representatives of the paper industry stress that the preliminary insolvency proceedings of the German coated magazine paper manufacturer Kabel Premium Pulp and Paper and the announced closure of UPM's SC paper and newsprint mill in Ettringen, Germany are definitely sending a signal about the state of the industry. These two events are reportedly influencing price negotiations for the second quarter of 2025. In the talks, many paper mills are stressing their fraught financial situation and the urgent need to raise paper prices.

Sceptics, however, do not anticipate an acute shift in the negotiating stances of paper producers and printers. Given the extensive paper supply and the continuously shrinking need for LWC and SC paper, as well as the precarious situation of some players in the printing industry, it will be difficult to implement price hikes, they say. They point out that the above-mentioned paper mills are still operating, so the market continues to be oversupplied.

UPM intends to close the Ettringen paper factory in mid-2025 in response to declining demand. The mill operates one paper machine with a nominal production capacity of 270,000 tpy of SC-B paper and newsprint.

The Kabel mill in Hagen has a nominal capacity of 450,000 tpy of LWC, MWC, and book paper, but recently the site has been producing less than 300,000 tpy. The financial troubles have pushed the company to open preliminary insolvency proceedings. The two paper machines at the mill have meanwhile resumed operations again and a search for an investor has reportedly been started.

Despite the disappointment and uncertainty that some buyers are feeling because of this insolvency, Kabel is believed to have its place in the market for graphic paper. So there is hope that the company will benefit from the preliminary insolvency procedure to revamp itself with a more profitable and better business model. If the mill does go out of business, the rotogravure printing market would lose one of its last remaining paper suppliers, industry representatives say.

Against this backdrop, one industry representative commented: "The market for publication paper did not get any better in the new year. This was to be expected." However, it was possible that the drops in demand are turning out to be larger than some players had forecast, EUWID was told. In addition to the structural downward demand trend, some producers of LWC and SC papers are struggling with downgrading, which mainly benefits the newsprint segment.

Experts increasingly believe an accelerated shake-out in the printing and paper industries is possible. Looking at the financial situation of many companies, market experts say the frequency of liquidity shortfalls is worrying. Printing companies reportedly have growing difficulties with credit insurance. The capacity utilisation, margins and financial resources of many printing companies are cause for concern, EUWID was told.

Critics often complain that greater cost and price discipline is necessary in both the printing and paper industries. Moreover, the long-lasting trend towards so-called special deals with individual prices is a hot topic of discussion.

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Only prices for brown kraftliner rise in March

In late February and early March, it was still unclear whether the price hikes would apply for all of the kraftliner grades tracked by EUWID or only for brown grades. While some players report they had to pay €40/t more for white-top kraftliner in March, at the end of the month, it appears there has generally been a sideways trend for this grade as well as semi-chemical fluting.

Heftier mark-ups were introduced for brown kraftliner, with almost unanimous reports of a €60/t adjustment in March. Early on, some players had said they were able to postpone the increase until April, but for most of the market, it seems that the increase was implemented during March.

Producers as well as merchants of kraftliner described their activity levels over the first three months of 2025 as good – and definitely better than for recycled grades, not least owing to the smaller number of producers. In addition, maintenance work and problems with paper machines at a few suppliers reportedly tightened supply somewhat, which is also influencing current market conditions. Several companies say that, on the whole, demand from the corrugated industry is better than expected, especially considering that modest to declining demand Q1 trend that had been forecast at the beginning of the year.

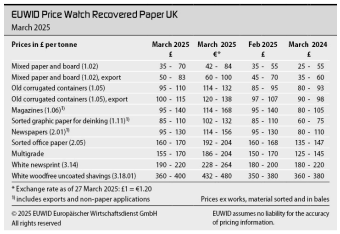
Players are now starting to speculate that prices for kraftliner could rise again soon, following the step in March. At the end of the first quarter, industry insiders are keeping an eye on what happens with prices for brown recycled corrugated case material. It looks like producers in that segment are already planning a new mark-up soon, after introducing an adjustment of €80/t in February. If such an increase goes through, producers of kraftliner might also start eyeing another step.

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Upturn on British RCP market: Rising prices driven by demand from Continental Europe and India

EUWID + 02 April 2025 | ~ 4 min | Published in issue 14/2025



EUWID Price Watch Recovered Paper UK
March 2025

Prices in £ per tonne	March 2025 £	March 2025 €*	Feb 2025 £	March 2024 £
Mixed paper and board (1.02)	35 - 70	42 - 84	35 - 55	25 - 55
Mixed paper and board (1.02), export	50 - 83	60 - 100	45 - 70	35 - 60
Old corrugated containers (1.05)	95 - 110	114 - 132	85 - 95	80 - 93
Old corrugated containers (1.05), export	100 - 115	120 - 138	97 - 107	90 - 98
Magazines (1.06)[1]	95 - 140	114 - 168	95 - 140	80 - 105
Sorted graphic paper for deinking (1.11)[1]	85 - 110	102 - 132	85 - 110	60 - 75
Newspapers (2.01)[1]	95 - 130	114 - 156	95 - 130	80 - 110
Sorted office paper (2.05)	160 - 170	192 - 204	160 - 168	135 - 147
Multigrade	155 - 170	186 - 204	150 - 170	125 - 145
White newsprint (3.14)	190 - 220	228 - 264	180 - 200	180 - 220
White woodfree uncoated shavings (3.18.01)	360 - 400	432 - 480	350 - 380	360 - 380

* Exchange rate as of 27 March 2025: £1 = €1.20
[1] includes exports and non-paper applications
Prices ex works, material sorted and in bales

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The volatility seen on the recovered paper markets in Continental Europe fully reached the UK by mid-March. Prior to that, the market had been balanced: As many paper producers from Europe were avoiding British recovered paper due to higher prices early in the month, most volumes had instead been heading to Asia.

Within the UK, there had been an unusually steep drop-off in collection volumes following the typical January peak. “They simply collapsed,” said one market insider. Initially, this was not a problem for British paper factories, as some mills had scheduled downtime in the first quarter.

When buyers from the EU, particularly customers from Germany, suddenly showed interest in British recovered paper starting in the middle of March, the majority of available material had already been sold in monthly contracts. In other cases, British suppliers were simply unable to organise the logistics to transport the fibre across the English Channel quickly enough. This set off a price rally.

Some market watchers criticise the purchasing behaviour of Continental European producers: They had been speculating on falling prices in March, assuming that collection volumes would rise again at that point. “Instead of paying only slightly higher prices at the end of February, they now have to dig much deeper into their pockets and yet will barely get any volumes,” commented one expert.

Indian paper producers drive prices higher

However, market players believed that it was paper producers from India that were the main drivers of the price surge. Indian mills were buying because of good domestic demand and falling freight rates along with the need to build up inventory in advance of monsoon season which starts in June.

“It is the first time in my entire career that Indian buyers are paying the highest prices for recovered paper,” said one insider. In some cases, bids from India even exceed the prices paid by Indonesian buyers – which are typically higher due to the stricter quality requirements associated with Indonesian inspections. However, market insiders also noted the risks involved in these transactions. Buyers from India had been known to apply considerable price adjustments retroactively based on quality

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complaints. This can reduce the value of the originally attractive offer, says one market insider.

The market in India is thus moving in a clearly different direction than countries elsewhere in Asia are. Especially in China, there are reports of falling prices for finished and recovered paper, which are also putting the brakes on activity in Vietnam, Thailand, Malaysia and Indonesia. In light of the high recovered paper prices, Chinese buyers quickly withdrew from the market.

Strong price trend for corrugated packaging and mixed paper

The impact of this demand boom on prices for old corrugated containers (OCC, 1.05) is very apparent in March. From the second half of March, quotes rose from around £95-100/t to as much as £115. For April, market participants are expecting prices above £120/t.

Mixed paper and board (1.02) prices had also picked up, initially rising moderately in the wake of the mark-ups for OCC. But then prices here started to develop independently, climbing even faster – and in some cases, even exceeding the levels in the reported price bracket.

This upward trend for mixed paper also put a stop to the downward slide for deinking grades (1.11). Experts expect higher prices again as of April in order make sorting economically viable.

For woodfree multigrade, there was a slight price increase, which EUWID sources attributed to higher demand from one non-tissue producer as well as exports to India.

Sorted office paper (2.05), on the other hand, remained stable. Despite lower collection volumes, demand from tissue producers is also modest, EUWID was told.

It is unclear where the market will be heading in April: Collection volumes traditionally rise at this time of year, both the government's financial year and the national tax year end this week, meaning marking the end of the retention period for numerous older documents. But the resulting upswing in arisings is definitely not as pronounced as it was just a few years ago, owing in part to increasing digitalisation. This is also the time of year when producers of recycled tissue start to source material to cover the typical summer bottlenecks, which results in some inventory build-up.

In March, white woodfree uncoated shavings, which are used as substitutes for pulp, became £10-20 more expensive – a result of weak volumes and strong demand, especially from Germany.

Outlook cloudy due to geopolitical situation

Market's development after April could depend on numerous factors. Trade conflicts with the USA, potential tariffs on paper and board, volatile logistics costs and exchange rate fluctuations could strongly influence the market.

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At the same time, some experts warn about a bubble in the recovered paper market. The current price rally might just be a flash in the pan, as the underlying fundamentals – i. e., demand for paper and board packaging – have not improved.

Independent suppliers expect to benefit from the commissioning of the new recycled corrugated case material machine at Eren Paper in Shotton, Wales, which is scheduled to start up at the end of the year. As of the third quarter, the company will therefore likely began purchasing larger volumes of recovered paper.

UK recovered paper exports

tonnes	January - December		%
	2024	2023	Change
Total EU 27	**858,189**	**545,151**	**+ 57.4**
France	150,792	76,891	+ 96.1
Germany	286,158	210,878	+ 35.7
Netherlands	284,297	181,590	+ 56.6
Total other Europe	**369,221**	**300,065**	**+ 23.0**
Turkey	367,807	296,855	+ 23.9
Total Asia	**2,554,236**	**3,105,004**	**- 17.7**
China	2,436	4,042	- 39.7
India	914,247	1,267,365	- 27.9
Indonesia	273,925	368,654	- 25.7
Malaysia	584,935	584,989	± 0.0
Thailand	186,946	332,768	- 43.8
Vietnam	549,360	490,267	+ 12.1
Total South America	**1,372**	**1,698**	**- 19.2**
Total Africa	**395**	**1,864**	**- 78.8**
Total North America	**17**	**225**	**- 92.3**
Total Australasia	**1,223**	**156**	**+ 685.0**
Total Exports	**3,784,652**	**3,954,162**	**- 4.3**

Source: CPI

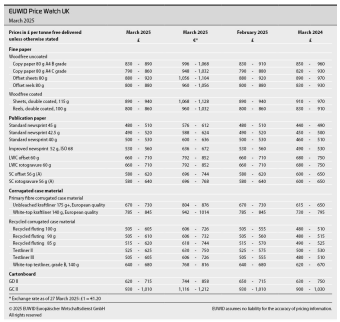
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Paper producers push through price increase for recycled CCM in the British market

Publication paper negotiations in progress

EUWID + 02 April 2025 | ~ 11 min | Published in issue 14/2025



EUWID Price Watch UK

March 2025

Prices in £ per tonne free delivered unless otherwise stated	March 2025 £	March 2025 €*	February 2025 £	March 2024 £
Fine paper				
Woodfree uncoated				
Copy paper 80 g A4 B grade	820 - 890	996 - 1,068	820 - 910	850 - 980
Copy paper 80 g A4 C grade	790 - 860	948 - 1,032	790 - 880	820 - 930
Offset sheets 80 g	880 - 820	1,056 - 1,104	880 - 920	890 - 970
Offset reels 80 g	800 - 860	960 - 1,056	800 - 880	830 - 930
Woodfree coated				
Sheets, double coated, 115 g	890 - 940	1,068 - 1,128	890 - 940	910 - 970
Reels, double coated, 100 g	800 - 860	960 - 1,032	800 - 860	830 - 910
Publication paper				
Standard newsprint 45 g	480 - 510	576 - 612	480 - 510	480 - 480
Standard newsprint 42.5 g	490 - 520	588 - 624	490 - 520	490 - 500
Standard newsprint 40 g	500 - 530	600 - 636	500 - 530	460 - 510
Improved newsprint 52 g, ISO 60	530 - 560	636 - 672	530 - 560	490 - 530
LWC, offset 60 g	660 - 710	792 - 852	660 - 710	680 - 750
LWC, rotogravure 60 g	660 - 710	792 - 852	660 - 710	680 - 750
SC, offset 50 g (A)	590 - 620	696 - 744	590 - 620	600 - 650
SC, rotogravure 56 g (A)	590 - 640	696 - 768	590 - 640	600 - 650
Corrugated case material				
Primary fibre corrugated case material				
Unbleached kraftliner 175 gsm, European quality	670 - 730	804 - 876	670 - 730	655 - 690
White-top kraftliner 140 g, European quality	765 - 845	942 - 1014	765 - 845	730 - 765
Recycled corrugated case material				
Recycled fluting 100 g	595 - 605	696 - 726	595 - 555	480 - 530
Recycled fluting 90 g	595 - 610	606 - 732	595 - 560	480 - 515
Recycled fluting 85 g	515 - 620	618 - 744	515 - 570	490 - 525
Testliner II	525 - 625	630 - 750	525 - 575	500 - 530
Testliner III	595 - 605	696 - 726	595 - 555	480 - 530
White-top testliner, grade B, 140 g	640 - 680	768 - 816	640 - 680	620 - 670
Cartonboard				
GD II	620 - 715	744 - 858	650 - 715	630 - 750
GC II	930 - 1,010	1,116 - 1,212	930 - 1,010	900 - 1,000

* Exchange rate as of 27 March 2025: £1 = €1.20

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With the usual delay of one month, and sometimes even longer, the price increase for brown recycled corrugated case material is now also coming to the British market. The other CCM grades are to follow from April or May. On the cartonboard market there is moderate demand and high competitive pressure, so that despite announced price increases, prices for GD board continued to fall.

For printing and writing papers, new prices for deliveries as of April are being negotiated. Publication paper producers want to avoid price reductions in the second quarter at all costs. There have been isolated announcements of higher prices for fine paper.

Producers of fine paper launch attempt to raise prices

On the market for fine paper, a handful of paper producers have launched an initiative to raise prices. However, by the end of March, not all producers were on board, at least not yet. They are looking to achieve mark-ups of 5-8 per cent, or sometimes more, with effect for deliveries in April. So far, it is unclear whether and to what extent this hike can be implemented. In the final week of March, the market survey did not reveal much concrete information about the potential outcome of this price round.

Paper producers insist they want to raise prices due to higher costs. Yet, buyers believe they have the upper hand in negotiations, given that the existing production capacity in Europe is more than sufficient. And there has been no reduction in the offerings from non-European producers, who have a strong position in the UK market for copy paper in particular. Over the course of the past year, these overseas producers have strengthened their presence on the British market.

The spot market offers many opportunities to source paper at low prices, said one market insider, describing the current situation. Spot prices are still widely available – and definitely not only from non-European producers, according to market insiders. At the same time, though, a relatively wide range of prices continue to exist. March prices were reported to be unchanged compared with February in most cases. If prices moved at all, then in a downward direction, insiders note.

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There were no surprises when it came to development of demand for and consumption of woodfree coated and uncoated paper in the UK during the first two months of the year. Early figures indicate that consumption and demand continued to contract. Although a few paper producers say their activity levels are not bad, paper machines are often operating with insufficient capacity utilisation. In general, copy paper is the one market most likely to be described as decent, although price battles are being waged here. Demand for paper in the school supply segment is normal, according to producers. Things are not looking so good in the business with commercial printing paper, EUWID was told.

Paper producers are said to be in a tough situation, so some players believe the targeted price hike will not be easy to implement. The announcement of higher prices might perhaps prevent further price declines, but it remains to be seen whether there is any chance of market-wide price hikes and what size these might be, comments one market insider.

Stalemate in publication paper price talks for the second quarter

Negotiations are in full swing to determine the prices for publication paper in the UK. Producers have signalled that a price hike for newsprint is absolutely necessary due to high costs. “We need higher prices,” one respondent declared to EUWID. In advance of the negotiations for deliveries in the second quarter, there were also announcements from a small number of paper producers who intend to raise prices. However, not all paper companies entered into the price talks with requests for higher prices. There were also some signals that second-quarter prices could remain unchanged.

Buyers of newsprint, for their part, often entered negotiations calling for lower prices. Yet, one paper producer stated that price reductions were inconceivable. “Everybody is making a loss right now,” EUWID was told. Indeed, costs in paper production have risen again over the past few months. And although price levels are relatively high from a historical perspective, some paper mills are already or on the verge of spilling red ink. One market insider sums up the situation thusly: If prices go any lower, at least two paper machines in Europe are in danger of closure.

Demand for newsprint is currently only sufficient to keep paper machines running at levels described as somewhere between mediocre and satisfactory. Customers are calling off the agreed volumes, said one supplier. Although there have been capacity closures, these will not be sufficient in the long term to balance the market, insiders explain.

The British market for newsprint has shrunk considerably in recent years and now consumes only around 450,000 tpa in total.

It is a similar picture in price negotiations for magazine paper in the UK, where buyers also began the talks by asking for price cuts. Representatives of the paper industry say they are unable to trim prices any further, as they would otherwise head (in some cases, deeper) into loss-making territory. Papermakers say that, at most, stable prices are imaginable, and there were very occasional calls from producers for higher prices. Market insiders predict the majority of prices for the second quarter will show very few changes compared with the first quarter. However, not all of the negotiations had been completed by the second half of March.

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The imbalance is even greater in the markets for SC and especially LWC paper than in the newsprint market. Commercial printing companies had recently started using more newsprint again, say market participants in the UK. Otherwise, consumption of magazine paper in the UK is seeing the same structural decline as in the rest of Europe. While the UK's annual consumption of coated mechanical paper ten years ago amounted to around 790,000 t, by 2024 this volume had shrunk to just 320,000 t. A similar trend was seen for uncoated mechanical paper, where consumption in the UK fell from 460,000 t to 175,000 t over the same period.

In the publication paper market, in light of the yawning gap between production capacity and paper consumption, which is constantly growing, the question of further capacity closures is on everyone's mind. The shuttering of UPM's Ettringen mill in Germany will remove further production capacity from the market and the latest developments at the German LWC and MWC paper producer Kabel Premium underscore the difficult situation facing producers of printing and writing paper in Europe. Most of the market players surveyed expect further closures will be announced soon. Should prices decline, such announcements could come even faster.

Prices for recycled CCM now also rise in the UK despite sluggish demand

British paper producers have pushed through a price increase of £50/t for brown recycled corrugated case material on the British market from mid-March or 1 April at the latest. Higher prices have also been announced for unbleached kraftliner, white-top kraftliner and white-top testliner – these are to take effect from April or May. According to market participants, it is still unclear whether the increases will also be £50/t or slightly lower.

The price movement is taking place in a market environment with sufficient, but by no means buoyant, demand. Supply is considered to be ample, even though one market player reports that less imported base paper is currently entering the UK. However, the imminent launch of three new paper machines on the European mainland and another in Turkey is casting its shadow. As a result, players expect manufacturers to see this as the last opportunity to push through price increases.

Furthermore, market participants note that a supplier on the continent has already announced a further price increase. On the one hand, this is welcomed because it means that prices for corrugated packaging could also rise. On the other hand, some packaging producers fear that the market is not strong enough for a second paper price increase. A further increase could be unsustainable and eventually lead to falling prices over the summer – above and beyond the increase already achieved. This volatility makes it particularly difficult for packaging manufacturers to operate, it is criticised.

The mood among manufacturers of corrugated sheets and packaging is much more cautious. Demand is described as adequate or even disappointing – and the industry is far from the hoped-for turnaround.

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The main cause is considered to be the continued weakness of domestic demand. Although inflation is falling, high interest rates, increased food prices and geopolitical uncertainties are dampening the spending mood of many consumers. Disposable income is still severely restricted.

Additional pressure on companies will be generated by the rise in social security contributions and the higher minimum wage that come into force in April. Industry representatives fear that these measures could slow economic growth in the UK. “We have to wait and see what the specific impact of these additional costs will be,” said a packaging manufacturer. Until then, they will refrain from hiring new staff and investing.

Higher paper prices usually lead to price adjustments for corrugated sheets. However, according to market participants, it remains to be seen whether these will be passed on to corrugated packaging prices as competitive pressure is too high. One integrated manufacturer is currently raising its paper prices, but at the same time lowering its packaging prices – a situation that increases the pressure on the margins of other suppliers and is criticised by other players.

Market players are also watching the ongoing consolidation in the British packaging market with interest. Following the takeover of Onboard, Eren Paper has now also purchased Diamond Box. Experts assume that the new owners from Turkey are planning major investments in Diamond Box’s plant in Birmingham. It is also speculated that Eren Paper will in turn might refrain from installing a corrugator and packaging machines at the Shotton site in Wales.

Slightly brighter mood on UK cartonboard market

After a modest start to the year, the British cartonboard market appears somewhat livelier in March. Many market participants described the month as “not bad,” with higher order intake than in February. Nevertheless, the situation remains uncertain, especially in light of shorter planning horizons and a tense international trade environment.

Demand is “decent but not great,” players often said. Packaging producers and their customers were aware that they could get all of the needed volumes quickly, so they were ordering on much shorter notice than in the past, explained one market expert. In addition, there is the geopolitical volatility. “We have a few orders in the pipeline, but due to the uncertainty, nobody wants to commit right now,” explained one producer.

Demand continues to be solid in the private-label segment – especially in the food segment – while the premium and luxury product segments remain under pressure.

Cartonboard can still be sourced on short notice and the inventory levels in the supply chain remain higher than necessary in this market situation, insiders say. Most factories continue to produce at average levels without any unscheduled downtime.

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The announced closure of a GD board mill in Spain led to some shifts on the British market, as the mill was seen as a "substitute" for a different mill in France that shut down at the end of 2024.

Despite the high cost pressure, especially for recovered paper, and announced price hikes, quotes for GD2 board have generally been ticking lower recently. Producers from Asia as well as from Europe have been acting very aggressively in the market, EUWID was told. The lower price bracket for GD2 board slipped again in March. One expert reported mark-downs of as much as £70/t.

Nevertheless, producers are sticking to their plans to raise GD board prices. This is unavoidable owing to the cost situation, they say. While players in most Continental European countries are reporting that higher prices were implemented in March and April, situation in the UK is still unclear. Insiders reckon a hike in April or May is more likely, possibly in smaller or multiple steps of £15-25. Yet, a few experts expect that prices will hold steady in April.

Prices for GC2 board appeared stable, but there is immense pressure here as well. Asian imports cost around £800, according to market sources, while European suppliers were charging as much as £1,100. The recently commissioned capacities at the Oulu mill in Finland are also casting a shadow on the market. One converter therefore expects to be able to push down prices for GC2 board by as much as £150/t by the end of the second quarter.

European board producers expressed concern about the growing market penetration of Asian producers. European producers claim their carbon footprints (Scope 1-3) are better. The EUDR might be helpful for EU markets, but there is a risk that Asian producers will then primarily target the British market.

Moreover, market insiders are speculating about the impacts of a trade war with the USA, which also affects forest products. Volumes produced in Europe and Asia that were originally intended for the US market would now weigh more heavily on the European market. Other experts point out, however, that this would also mean no more cartonboard coming from the USA to Europe – and this could create some new opportunities for European producers.

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UK key market data

December 2024

in tonnes	December			January - December		
	2024	2023	%	2024	2023	%
Production						
Corrugated case materials	101,751	101,908	- 0.2	1,435,852	1,375,468	+ 4.4
Recycled Fluting	48,937	48,519	+ 0.9	710,455	674,379	+ 5.3
Testliner	52,814	53,389	- 1.1	725,397	701,089	+ 3.5
Parent reels of tissue	51,469	56,715	- 9.2	713,856	734,475	- 2.8
Other papers and boards, incl. printing and writing paper	86,780	86,754	± 0.0	1,137,597	1,113,027	+ 2.2
Total paper and board	**240,000**	**245,377**	**- 2.2**	**3,287,305**	**3,222,970**	**+ 2.0**
Apparent Consumption						
Packaging paper and board	n. a.	n. a.	n. a.	3,616,154	3,457,311	+ 4.6
Corrugated case materials	177,426	169,716	+ 4.5	2,436,202	2,375,248	+ 2.6
Kraftliner and SC Fluting	26,755	27,641	- 3.2	389,077	394,794	- 1.4
Recycled Fluting	59,262	61,220	- 3.2	861,939	836,510	+ 3.0
Testliner	91,409	80,855	+ 13.1	1,185,186	1,143,944	+ 3.6
Cartonboard and other board for packaging	n. a.	n. a.	n. a.	971,763	898,164	+ 8.2
Packaging papers	n. a.	n. a.	n. a.	208,189	183,900	+ 13.2
Parent reels of tissue	80,860	83,792	- 3.5	1,110,605	1,095,817	+ 1.3
Printings and writings	n. a.	n. a.	n. a.	1,440,035	1,278,748	+ 12.6
Uncoated mechanical	n. a.	n. a.	n. a.	198,163	175,597	+ 12.9
Uncoated woodfree	n. a.	n. a.	n. a.	594,246	534,275	+ 11.2
Coated mechanical	n. a.	n. a.	n. a.	317,712	321,475	- 1.2
Coated woodfree	n. a.	n. a.	n. a.	329,914	247,401	+ 33.4
Other papers and boards	n. a.	n. a.	n. a.	611,944	633,413	- 3.4
Total paper and board	n. a.	n. a.	n. a.	**6,778,738**	**6,465,289**	**+ 4.8**
Exports						
Corrugated case materials	6,529	8,138	- 19.8	142,901	125,270	+ 14.1
Recycled Fluting	2,194	2,844	- 22.9	61,614	46,769	+ 31.7
Testliner	4,335	5,294	- 18.1	81,287	78,501	+ 3.5
Parent reels of tissue	71	509	- 86.1	645	8,434	- 92.4
Other papers and boards, incl. printing and writing paper	44,371	36,431	+ 21.8	591,468	547,442	+ 8.0
Total paper and board	**50,971**	**45,078**	**+ 13.1**	**735,014**	**681,146**	**+ 7.9**
Imports						
Corrugated case materials	82,204	75,946	+ 8.2	1,143,251	1,125,050	+ 1.6
Kraftliner and SC Fluting	26,755	27,641	- 3.2	389,077	394,794	- 1.4
Recycled Fluting	12,519	15,545	- 19.5	213,098	208,900	+ 2.0
Testliner	42,930	32,760	+ 31.0	541,076	521,356	+ 3.8

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Total paper and board	**371,205**	**343,159**	**+ 8.2**	**4,226,447**	**3,923,466**	**+ 7.7**
Fibre						
Woodpulp mill usage						
Sulphate Bleached Softwood	21,858	26,119	- 16.3	306,634	315,209	- 2.7
Sulphate Bleached Hardwood	24,475	27,285	- 10.3	347,704	366,584	- 5.2
Other grades of woodpulp	14,885	15,238	- 2.3	214,892	214,245	+ 0.3
Woodpulp imports						
Sulphate Bleached Softwood	17,305	20,019	- 13.6	238,482	234,917	+ 1.5
Sulphate Bleached Hardwood	42,209	32,096	+ 31.5	448,061	378,797	+ 18.3
Other grades of woodpulp	2,039	1,522	+ 33.9	25,264	22,968	+ 10.0
Recovered paper						
Mill usage	200,343	193,463	+ 3.6	2,625,122	2,548,456	+ 3.0
Collection	508,520	477,509	+ 6.5	6,297,272	6,407,124	- 1.7

Source: CPI

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Mondi finalises acquisition of Schumacher Packaging's Western European assets

01 April 2025 Igor Dugandzic | ~ 1 minPublished in issue 14/2025

Mondi has completed the acquisition of Schumacher Packaging's aasets in Western Europe on 1 April.



Ebersdorf packaging facility is one of the two state-of-the-art mega box plants in Germany that offer significant growth potential following, according to Mondi.

The deal, which encompasses Schumacher Packaging's corrugated board and packaging and solid board business in Germany, Benelux and the UK, was previously cleared by the European Commission (EC). The Commission had no objections to the deal as the transaction had limited impact on competition in the markets where both companies are active, for example in Germany and Austria, and would not raise any competition concerns, EC said in a press release on 27 March.

The deal has an enterprise value of approximately €635m and will add more than 1 billion m² in capacity to Mondi's existing operations. The assets in Germany, Benelux and the UK will reportedly complement Mondi's existing network of corrugated solutions plants across Central and Eastern Europe. They will expand the group's footprint in Western Europe, in particular, enhance its customer offering and create a strong platform for further growth, while offering strong vertical integration opportunities, Mondi CEO Andrew King explained.

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Price increase announcements for coreboard

31 March 2025 | ~ 1 minPublished in issue 14/2025



Following the increase in recovered paper costs, Sonoco and Solidus Solutions have announced price increases for their products, which include coreboard.

US company Sonoco informs that it is implementing a price increase of €60/t for all grades of coreboard and paperboard in Europe. The hike is to take effect for deliveries from 7 April.

The company points to a general shortage of recovered paper grade OCC (old corrugated containers), the primary raw material in coreboard production. “OCC generation has been low across Europe which has resulted in rising prices in March, and we expect additional increases in April and beyond," said Adam Wood, Vice President of Sonoco's Industrial Paper Products Europe business. In addition, energy costs remain high. “We were hopeful for energy price reductions as we entered spring to help offset the material inflation, but this is not materialising," Mr Wood added.

Dutch company Solidus Solutions has also announced a price hike for all grades of solid board by €60/t starting with deliveries from 14 April. The company produces solid board for several applications, including coreboard, hardcover books, standing displays and cardboard stationery.

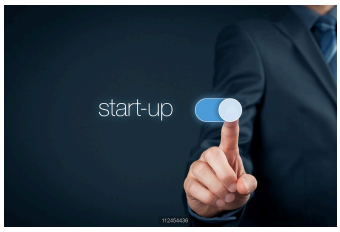
Solidus Solutions also cited the significant input costs increase in the last months, especially on the recovered paper and lining paper side.

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Kipas Kagit starts up new containerboard machine in Söke

EUWID + 26 March 2025 Valeria Buß | ~ 1 min | Published in issue 14/2025



Kipas Kagit's new corrugated case material machine at the Söke mill in Turkey is up and running. A spokesperson told EUWID that commercial production on the PM 3 was started in mid-March, following trial runs that had begun around the end of 2024.

The new machine has a capacity of 650,000 tpy and can produce both recycled and fresh fibre-based paper in grammages between 50-110 g/m². According to the company, products include testliner, white-top testliner and fluting as well as kraftliner and recycled kraft paper for paper bags.

Kipas Kagit had announced plans to install a new paper machine at the Söke site in western Turkey back in 2021, with operations expected to commence in the third quarter of 2023. However, the company ran into some delays, not least because the Söke mill was hit by a major fire last summer.

Kipas Kagit runs a second machine at the Söke mill which can produce corrugated case material and cartonboard with a capacity of 720,000 tpy. The company has a second production site in Kahramanmaras in southern Turkey. This mill has a capacity of 450,000 tpy of corrugated case material.

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James Cropper appoints Paul Barber as new Managing Director of Paper & Packaging

20 March 2025 Frauke Schmidt | ~ 1 minPublished in issue 14/2025

British specialty paper and advanced materials manufacturer James Cropper has named Paul Barber as the new Managing Director of its Paper & Packaging division.



Paul Barber, MD of James Cropper Paper & Packaging

Mr Barber brings extensive industry experience, having held senior leadership positions at companies such as Sonoco, Weidenhammer, Smurfit Kappa, DS Smith, Corrboard, and Coveris.

Commenting on his appointment, Barber said: "Throughout my career in the paper and packaging industry, I have always respected James Cropper for its legacy of quality, innovation, resilience, and commitment to ESG principles. This is an exciting opportunity to join an outstanding team. My priority will be to foster an environment where our employees can excel, while leveraging their expertise to drive tailored solutions for our customers. I will also focus on enhancing operational capabilities and implementing new systems and processes to further strengthen customer support."

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Köhlerpappen in insolvency proceedings

13 March 2025 Alexander Ungemach | ~ 1 minPublished in issue 14/2025

German solid board producer Köhlerpappen has run into difficulties. The company has filed for the opening of insolvency proceedings.



Köhlerpappen files for insolvency proceedings

On 11 March 2025, the Local Court of Offenburg appointed a provisional insolvency administrator.

Köhlerpappen manufactures products from various raw materials such as waste paper, grass clippings and wood pulp, in particular for applications in the packaging and games industry. The company has roughly 100 employees and has a capacity to produce 48,000 tpy of board.

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