

Mondi expands in paper sack market in Southeast Asia

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Mondi Group has entered into a joint venture with Indonesian cement producer PT Indocement Tungal Prakarsa to expand its paper sack business in the region. The JV, called PT Mondi Indo Prakarsa Kemasan, will be located in the cement manufacturer's plant complex in Citeureup in West Java/Indonesia, and will initially produce paper sacks for the company, Mondi explained in mid-April. Indocement will act as the main customer of the joint company to ensure long-term volume stability. The Austrian paper and packaging manufacturer will hold 60 per cent of the shares in the JV, Indocement the remaining 40 per cent.

Mondi will install an additional paper sack production line in addition to the existing production line to further optimise operations and create a foundation for expansion in Southeast Asia. This will increase Mondi's production capacity for paper sacks by over 200 million units. According to the announcement, the joint venture is expected to become operational by the end of 2026, subject to completion of all commercial, operational and legal preparations. "This joint venture is an excellent strategic fit for our paper bags business. It allows us to establish a strong local platform in a structurally growing market, underpinned by a reliable long-term customer," said Claudio Fedalto, Chief Operating Officer Paper Bags at Mondi.

Expansion of market standing for paper sacks

Mondi says the JV will enable it to grow further in the paper sack market. The group already describes itself as the world's leading manufacturer of paper sacks. In the past fiscal year 2025, the packaging and paper manufacturer produced a total of around 5.9 billion units in its own integrated processing plants. In 2025, Mondi also produced a total of 800,000 t of sack kraft paper, of which 700,000 t were used in its own packaging plants, according to available information.

Star Paper Mill starts recycled CCM production in Abu Dhabi

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UAE-based papermaker Star Paper Mill has started production of recycled containerboard at a new plant in Abu Dhabi. Production started on 10 April 2026, General Manager Aejaz Ahmed Munshi announced on LinkedIn.

Star's new paper machine is designed to produce around 135,000 tpy of recycled containerboard. The company aims to reduce the country's reliance on imports for packaging paper. Up to 80 per cent of the recovered paper demand is to be covered by domestic sources, the rest by imports from USA and the UK, among others. The company has also secured an adjacent plot of around 32,000 m² for potential future expansion.

The move is underpinned by growing demand for paper-based packaging in the region. According to market estimates, demand for paper carrier bags in the Middle East is growing by ten to twelve per cent annually, while the market for paper-based packaging in the Gulf countries is expected to grow to around \$13bn by 2032.

Star Paper Mill has so far been mainly active in the tissue segment. In Abu Dhabi, the company operates a primary fibre-based TM with capacity to produce around 40,000 tpy, commissioned in 2019.

APP concretises entry into European tissue market

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Indonesia's Asia Pulp & Paper (APP) appears to be preparing a market entry in several European countries. Recent job postings on LinkedIn indicate that the company is recruiting senior executives to build up a European business, with roles based in Cologne, Paris, London and Warsaw. The future managers will apparently report directly to the management of APP's consumer division in Shanghai.

According to the job advertisements, APP plans to establish local organisations in the respective countries and enter the European market within 18 to 24 months, laying the groundwork for sustainable growth.

At the same time, APP intends to build up an e-commerce channel, which is projected to account for more than 20 per cent of sales in the second year after market entry.

APP is the pulp, paper and packaging arm of the Sinar Mas Group. The group employs more than 70,000 people and has production and processing capacity of more than 28 million t worldwide, primarily in Indonesia and China.

Premier Paper's division WBC acquires Transpack

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Premier Paper has, via its trading division Wine Box Company (WBC), acquired Transpack Limited to strengthen its offering in growing packaging markets.

Transpack is a wholesale supplier offering products like packaging paper, bags, boxes and other packaging formats made from paper, board or plastics, mainly manufactured in the UK. The company's offices and warehouse will remain in Southampton, alongside WBC's existing offices in Herne Hill and warehouse facilities in Crawley, Premier Paper informs. Premier Packaging considers the acquisition to be highly complementary to the offering of WBC, which it acquired in 2022. It is expected to further strengthens the group's range and capacity across its growing packaging division. Financial details of the deal have not been published.

Premier Paper, a leading supplier of paper and packaging in the UK, reported consolidated group sales of £285m in 2024. The company is part of OVOL Japan Pulp & Paper Co.

K-C finished goods warehouse in the US destroyed in fire

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A major fire destroyed a warehouse and distribution centre of US tissue and sanitary products manufacturer **Kimberly-Clark (K-C)** in Ontario, California on April 8. No injuries were reported and the production facilities were not affected by the fire, Kimberly-Clark said. In order to minimise possible disruption to customers and consumers, K-C partnered with regional logistics partners to use alternative locations for incoming goods and establish additional storage capacities. The prosecutor's office is investigating the incident for possible arson with the damage reportedly at about \$500m, with insiders estimating \$750m in damages. K-C did not provide any information on the cause of the fire. According to the company, one person arrested by the authorities, is not a K-C employee.

Veolia appoints new CEOs for Northern Europe and Germany

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Waste management group **Veolia** has appointed **Richard Kirkman** as CEO for its Northern Europe business with effect from 2 April. He succeeds **Gavin Graveson**, who has become chief executive of Veolia's Asia Pacific zone. Mr Kirkman, who formerly served as managing director of Veolia Australia & New Zealand, was also appointed Chief Growth Officer. Veolia also announced that **Emmanuelle Menning** has taken over as CEO of the company's German operations with effect from 2 April. She succeeds **Stefan Grützmacher**, who had held the role on an interim basis following the departure of **Matthias Harms**. Ms Menning will retain her existing responsibilities as chief financial officer and deputy chief executive at group level.

Stora Enso raises EUR 1 billion via hybrid bonds

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Stora Enso has raised €1bn through two hybrid bond tranches (each €500m), using the proceeds for general corporate purposes, including refinancing existing debt and upcoming maturities. The instruments are subordinated, have no fixed maturity, and are treated as equity under IFRS, which strengthens the group's capital structure and financial flexibility. The 3-year tranche carries a coupon of 5.625 per cent, while the 5.5-year tranche pays 5.875 per cent; both are subordinated instruments with no fixed maturity and will be listed on Euronext Dublin.

Shandong Sun Paper orders new fibre line from Valmet

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Shandong Sun Paper is continuing to expand its pulp capacities. At the Yandian site in Shandong province, the company has planned a new 600,000 tpy pulp mill. Sun Paper has contracted Finnish plant manufacturer **Valmet** to supply the fibre line and key plant components with commissioning scheduled for the end of 2026.

Manufacturers seeking higher prices in response to mounting costs

The cost pressure facing European paper and cartonboard producers has tended to intensify since the outbreak of the Iran war, further eroding already slim margins. In April price talks, suppliers took a firm line on their demands for increases and, in many cases, succeeded in instituting higher prices. For publication paper, quarterly contracts in France contain higher prices across all grades. The same is true for the woodfree coated and uncoated paper segment, where prices also increased across the board.

Prices for most corrugated case material grades also edged higher in France in April after mark-ups already took hold for brown recycled grades in March. Cartonboard manufacturers have also unveiled plans to invoice more, with first hikes for GD (white-lined chipboard) being implemented for deliveries from May onwards.

Prices are on the move in France's fine paper market. Manufacturers had announced plans to charge up to eight per cent more. Price hikes have partly been implemented for deliveries from 1 April.

Uncoated woodfree paper prices often climbed by €30-40 and rarely less.

The new prices frequently apply for just a short period of one month for both woodfree coated and uncoated paper grades. What's more, at least two manufacturers have announced additional price hikes. In one instance, these prices were set to apply to deliveries from 15 April onwards, but so far this had not been implemented. Insiders are now saying that higher prices are under negotiation for May deliveries. In another instance, one uncoated paper producer has set its sights on additional mark-ups. Another fine paper manufacturer has also sought to impose an energy surcharge of €40/t on top of the customary €50/t hike.

Information about how much prices have actually risen varies, but market players agree on the whole that prices have generally moved higher across the board. One key factor was the determined stance adopted by paper producers out of necessity. They have been complaining for many months that prices are far too low, as their financials show, and have been hit by additional cost hikes since the start of March. Even though production costs have not yet risen dramatically as a result of the Iran war, transport costs have already increased noticeably.

Compounding matters, market sources said that the market sentiment appears to have shifted somewhat with the planned merger of UPM's and Sappi's fine paper businesses, even though the deal has not yet been approved or implemented.

Sources describe the price hike as driven less by demand, even though manufacturers are now mentioning somewhat livelier demand. It remains clear that consumption of woodfree printing and writing paper continues to decline for structural reasons. Paper manufacturers said that the news of higher prices led to some orders being brought forward in March. In France, in particular, municipal elections provided an additional boost to demand. On the whole, demand fell less sharply in the first quarter of this year compared to last year, insiders said.

Publication paper prices up in Q2

In France, talks to settle on second-quarter publication paper prices wrapped up at the end of March or start of April, with price hikes for all grades. With cost pressure mounting, manufacturers managed to institute higher prices despite surplus capacity, although not always to the desired extent. Prices applying for the entire first half of the year stayed the same.

Newsprint often became €20/t more expensive, with prices sometimes rising less and sometimes increasing by €25/t. The new price floor for 42 g standard newsprint is now just above €600/t.

Similar outcomes were reported in the SC paper market, with insiders often putting the hike at €20/t. In several cases, the price increase was implemented with a delay, meaning that it will not take effect until May. Alternatively, market players agreed on solutions with two instalments of €10/t. Additionally, one producer is seeking surcharges due to higher energy costs on top of these increases.

Insiders reported larger price increases on the LWC market, with contacts often telling EUWID that prices had risen by €30-40/t. A few sources described €40/t as customary and €30/t tending to be an exception. Others quoted increases of just €25/t. How much prices climbed depended on factors including where they stood before the rise. One manufacturer has unveiled plans to tack on another €40/t for mechanical coated reels from mid-April onwards, in addition to the existing mark-ups. As this issue went to press,

a decision had yet to be made on its implementation.

Second-quarter price talks had only just ended when paper manufacturers started the next price round. Producers told EUWID that the latest hike was actually much too small given how much costs have soared over the past six weeks. Higher transport costs, in particular, are being mentioned. Industry players also pointed out that the likelihood of additional cost hikes rose with every week that the Middle East conflict drags on. The cost situation varies wildly, depending on the mill in question, but a few mills were barely profitable even before the Iran war commenced.

The fact that higher prices took hold at all is due less to any improvement in market conditions and more to the exceptional situation following the outbreak of the war in Iran. Cost pressure has intensified for manufacturers, and for some buyers, the situation evokes unpleasant memories of the market situation when the war on Ukraine began. Paper buyers are well aware of the surplus capacity shaping the market and believe that sharply rising prices destroy print volumes. At the end of the day, though, it was the determination shown by paper manufacturers that proved crucial in seeing higher prices take hold.

Overall, the situation on France’s publication paper market has essentially not changed. Publication paper consumption is declining, not just for periodicals, where this has long been the case, but also for commercial printing. When it comes to printed advertising for retailers, insiders pointed out that retail chains typically allocate a budget for printed advertising. If paper becomes more expensive during the year, they simply buy less paper and reduce their print runs for advertising material.

French corrugated case material prices climb across the board

After brown recycled corrugated case material became €40/t more expensive on the French market in mid-March, additional hikes have now followed. First hikes have also emerged for kraftliner.

EUWID Price Watch France				
April 2026				
Price in EUR net/ton (taxes delivered unless otherwise stated)	April 2026	March 2026	April 2025	
Fine paper				
Woolfreen coated				
Copy paper 80 g A4 grade	900 - 100	800 - 900	900 - 1,000	
Copy paper 80 g A4 grade	940 - 100	800 - 850	800 - 1,000	
Other news 80 g	900 - 1,000	800 - 900	800 - 1,000	
Other news 80 g	900 - 100	800 - 900	800 - 1,000	
Woolfreen coated				
News, double coated, 100 g	900 - 1,000	900 - 900	900 - 1,000	
News, double coated, 100 g	900 - 900	800 - 900	900 - 1,000	
Publication paper				
Standard newspaper 40 g	600 - 620	500 - 600	600 - 620	
Standard newspaper 40 g	600 - 620	500 - 620	600 - 640	
Improved newspaper 100/100, 12 g	640 - 660	620 - 650	650 - 680	
LWC offset 60 g	700 - 620	700 - 700	700 - 620	
LWC newspaper 60 g	600 - 620	700 - 600	700 - 600	
LC offset 60 g (H)	600 - 700	600 - 600	600 - 700	
LC newspaper 60 g (H)	600 - 700	600 - 600	600 - 700	
Corrugated case material				
Recycled brown corrugated case material				
Unbleached kraftliner 150 g	800 - 900	700 - 800	700 - 800	
Unbleached kraftliner 150 g	800 - 900	800 - 800	800 - 900	
White-top kraftliner 140 g	800 - 1,000	800 - 900	800 - 900	
Recycled corrugated case material				
Recycled kraftliner 100 g	600 - 700	500 - 600	600 - 600	
Recycled kraftliner 100 g	600 - 720	500 - 600	600 - 600	
Testliner 80	600 - 700	500 - 600	600 - 600	
Testliner 80	600 - 700	500 - 600	600 - 600	
White-top kraftliner, grade 8, 140 g	700 - 700	600 - 700	700 - 700	
Cartonboard				
GLS	800 - 100	800 - 100	800 - 100	
GLS	1,100 - 1,200	1,100 - 1,200	1,100 - 1,200	
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Demand for recycled corrugated case material on the market in France has been much stronger over the past two months than it was at the start of the year. In comments echoed by other market players, one producer told EUWID that January and February had been weak to very lacklustre, but March and April had been relatively strong. It remained unclear whether the price announcements had played a role in companies ordering more, although this is considered a possibility. Quite a few sources believe that stronger demand at the moment reflects a genuine improvement in consumption, while others tend to view this as a seasonal effect or demand being brought forward rather than real growth.

What has, in any case, been a key driver behind paper manufacturers' demands for higher prices is the spike in costs over the past few weeks. While the increase in production-related energy costs has affected paper manufacturers to varying degrees, depending on the paper mill's facilities and current energy contracts, transport costs have already soared for all market players. Recovered paper has also become more expensive in France in April, owing to higher ex-works prices and freight rates. One paper producer calculated that the first price increase in March was needed just to offset these factors alone.

Kraftliner also cost more in April, with most prices climbing by €60/t for brown kraftliner and €40/t for white-top kraftliner at the start of the month. However, some prices will not edge higher until 1 May, with additional increases from this date likewise under discussion.

Price hikes of €60 to €80/t for semi-chemical fluting are also on the table for deliveries from 1 May, although their fate was still unclear as mid-April arrived.

Sources describe demand for kraftliner as good to very good at the moment in France. Insiders said that the market had picked up, with producers saying that they were busy and occasionally receiving requests for additional amounts. Kraftliner is not facing the same surplus capacity as recycled grades, consumption was rising a little, including for seasonal reasons, and imports from North America were down, experts remarked. A significant amount of capacity had been shut down in the US, and higher transport costs are also lessening the appeal of overseas business. A variety of scheduled stoppages for technical work in Europe are likewise limiting supply.

Producers announce higher cartonboard prices

Several European manufacturers have unveiled plans to raise cartonboard prices in recent weeks. Players on the French market also said that buyers had received notices to this effect. Recent events in Iran and the Gulf region, and their impacts on energy and fuel prices have fuelled the pricing plans of manufacturers, who have long complained about thin margins, and prompted some of them to bring forward their announcements or pursue them with greater force.

This is especially true for white-lined chipboard (WLC). All major GD 2 manufacturers in Europe announced increases, often as early as March, amounting to between €50 and €70/t. The new prices will mostly apply to deliveries from 1 May.

By mid-April, buyers and sellers alike said that price increases for GD were currently being implemented, although not to the desired extent. Several agreements containing higher prices had already been concluded. Manufacturers said that new orders would now be invoiced at the new prices. Given that lead times are typically at least four weeks, deliveries of this material are generally expected in May. Prices for GD deliveries in April were generally still unchanged at March's level.

In their price notice letters, manufacturers underscored the steep rise in costs that had made raising prices for cartonboard urgently needed. They highlighted not only higher energy prices, but also rising costs for logistics and auxiliary materials such as chemicals. A few suppliers said that there was certainly an understanding of their pricing plans. Even so, instituting higher prices was never easy, one player commented. However, the fact that many GD manufacturers had backed the pricing plans had made matters easier, one WLC manufacturer noted.

In this market setting, manufacturers were tending to move to shorter-term contracts so that they could respond more quickly to potential changes in the energy market. Many market players said that the newly negotiated prices would apply until further notice. Others cut their terms from six to three months.

There was broad agreement that the current round of price talks is being driven mainly by costs. Nonetheless, several market players noted that demand for GD board was not all that weak in April. Quite a few insiders reported slightly brisker order intake in recent weeks and somewhat longer lead times of mostly four to six weeks. One packaging manufacturer said that its customers had placed additional orders out of concern about an uncertain supply situation. Several cartonboard producers shared this view. Others attributed somewhat livelier demand more to seasonal effects.

The first announcements of higher prices for folding boxboard (FBB) were also made in mid-March. The affected manufacturers often demanded temporary surcharges ranging from €35 to €80/t for GC 2, amongst others, citing higher fuel and therefore logistics costs as well as more costly raw materials. One producer attempted to enforce a surcharge with immediate effect. In other cases, however, producers were demanding higher prices for deliveries from May onwards.

By the penultimate week of April, however, not all FBB producers had yet announced higher prices. A couple of GC board suppliers said in April that they were still waiting to see how the situation – and thus energy and oil prices – unfolded. They did not rule out the possibility of announcing higher prices in the weeks ahead. A few market players were already anticipating higher GC 2 board prices from May onwards. Others felt that this was too early, and do not expect higher prices to take hold until a later date. One buyer with a long-term contract until the end of June reported having already fended off calls from suppliers.

On the whole, the need for action in the GC market appears to be a little less acute than in the GD segment. One source explained that manufacturers in this segment could often use biomass-based energy made in-house, so they were under less pressure. However, they were also affected by higher transportation costs.

In the GC market as well, sources on both sides of the market were not dissatisfied with their order books. One producer said that they had received a couple more orders since April. One buyer confirmed that order intake was stronger than at the start of the year. Nonetheless, the situation remained “fragile,” one supplier said. Inventory building from customers might have played a role in this segment, too.

RCP prices edge up only slightly in Germany

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April is bringing only slight price increases for the mass recovered paper (RCP) grades of supermarket paper and board and mixed paper in Germany. However, insiders report that the amounts vary by region. In the west, especially, market players report mark-ups of €10 for supermarket paper and board, while prices in eastern Germany were broadly flat, with a slight upward trend at most. In most cases, observers reported unchanged prices for medium and high grades, indicating that the downward trend seen in recent months has largely come to an end in April.

Recovered Paper Germany				
March 2026				
Monthly changes in €/t	Mar 2026	Feb 2026	Jan 2026	Mar 2025
Mixed paper and board (1.02)	+ 1.50	+ 1.00	- 2.50	+ 20.50
Supermarket corrugated paper and board (1.04)	+ 2.00	+ 5.50	- 1.00	+ 21.50
Used corrugated kraft II (4.03)	+ 2.50	+ 4.00	+ 0.00	+ 20.50
Sorted graphic paper for deinking (1.11)	- 0.50	- 1.00	- 4.50	+ 1.00
Coloured letters (2.05/2.06) ¹⁾	- 3.00	- 3.50	+ 0.50	- 4.50
Multi printing (3.10)	- 1.00	+ 3.50	+ 1.50	+ 2.50
White newsprint/magazine paper (3.14/3.15)	- 4.00	- 0.50	- 3.00	- 3.00
White woodfree uncoated shavings (3.18.01)	- 1.50	- 3.00	- 2.00	+ 0.00

¹⁾ From January 2026, price reports for grade 2.05 will also be included in the assessment for coloured letters. Changes based on free delivered prices within Germany.
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The month of March saw little change to prices across the various recovered paper grades in Germany. An analysis of information provided by recovered paper suppliers and converters revealed that mixed paper and board (1.02) cost €1.50/t more in March than in February. Supermarket paper and board (1.04) prices rose by €2.00/t in a month-on-month comparison, while used corrugated kraft II (4.03) was priced €2.50/t higher than in February. By contrast, sorted graphic paper for deinking (1.11) prices softened by another €0.50. Sorted office paper/coloured letters (2.05/2.06) became €3.00/t cheaper, while multi printing (3.10) prices declined by €1.00/t. White newsprint/magazine paper (3.14/3.15) cost €4.00/t less. Prices for white woodfree uncoated shavings (3.18.01) reportedly slipped by €1.50/t.

On the whole, recovered paper prices have not altered much so far this year. Taken together, the price changes of the past three months, have returned mixed paper quotes to the same level seen as 2025 ended. Supermarket paper and board and used corrugated kraft II were both priced €6.50/t higher than in January by the time that the end of March arrived. By contrast, both sorted graphic paper for deinking and coloured letters cost €6.00/t less. Multi printing was priced €4.00/t higher than at the start of the year. All told, white newsprint/magazine paper has become €7.50 cheaper this year, while shavings prices were €6.50/t lower than at the start of 2026.

April might bring somewhat more change to prices for supermarket paper and board and mixed paper. Sources quoted hikes averaging €10 for western Germany, in particular, citing higher prices in neighbouring countries as one reason for the regional differences. By contrast, the east saw little upward movement in prices. Increases in these regions were limited to a maximum of €5, with many insiders also saying that prices were unchanged due to surplus supply of recovered paper in Poland. Several insiders

told EUWID that the closure of Ukraine's last paper mills due to the ongoing war meant that recovered paper generated in the country was increasingly entering the Polish market. With logistics costs high, though, paper for recycling from Poland is typically shipped only to German mills close to the border.

The number of machine closures in the paper industry had fallen noticeably of late, almost all insiders agreed. Production levels are likely to be somewhat higher again at present because of increased prices for finished paper. However, the rise in energy prices caused by the war in Iran and the Middle East is causing the economic environment in which paper mills operate to deteriorate significantly again. Paper industry sources noted that hopes of an upswing had suffered a significant setback. As a result, they see no real reason for recovered paper prices to rise, especially since major mills still have well-stocked warehouses.

For their part, waste management companies report that a few paper producers are on the hunt for recovered paper and thus willing to make concessions on pricing. One source suspected that some mills might come to regret the reductions made to fixed contract volumes they made at the start of the year.

Arisings from recovered paper collections remain low, although volumes increased a little close to Easter. At the same time, the holidays were responsible for scattered transportation disruptions. In some regions, this has meant that slightly stronger demand has coincided with somewhat limited recovered paper availability. One major waste management firm reported that it was becoming increasingly difficult to supply all its contractually agreed tonnages in full.

While the conflict in the Middle East has sent costs for manufacturing and transportation higher within Germany, with sources estimating the impact of higher diesel prices at €1-3/t, the turmoil in international trade has so far had little other impact on the German market. Exporting to the Middle East is still not especially appealing in most cases, especially since prices are relatively high in Germany. Barely any shipments are leaving Germany as a result. At the same time, potential changes in export flows from Europe to Asia do not appear to have brought any significant additional volumes of recovered paper from neighbouring countries onto the German market to date.

Medium and high grades mostly stable in price

The situation for deinking grades is described as very balanced. Now and again, insiders mentioned instances of undersupply, while elsewhere reports indicated pressure on prices for grade 1.11. On the whole, though, paper mills have been able to source what they need at unchanged prices. Prices for sorted graphic paper for deinking are thus generally regarded as stable. The only adjustment agreed in some cases was compensation for higher freight costs.

In the market for medium and high grades, "nobody is talking about the Strait of Hormuz," as one market player said, describing the limited impact of the war. There continues to be surplus supply, particularly of woodfree grades used to make tissue, mainly due to slack demand. Normally, prices for the medium grades tend to move upwards after Easter. In the current climate, though, it has been possible to source everything they needed without any price increases, experts told EUWID.

One recycled tissue producer is currently in the middle of an extended scheduled maintenance shutdown. As one contact pointed out, “if everyone is taking slightly less tonnage, the cumulative effect can be much more pronounced.” Nonetheless, tissue manufacturers are well aware that today’s conditions are only temporary and that the availability of medium grades is set to shrink over the medium to long term. Against this backdrop, paper makers are seeking to avoid excessive price swings, since a market is becoming ever more fragile and volatile as volumes continue to fall.

In the case of multi printing, a few insiders continue to report downward pressure on prices. Others, however, quoted higher prices, citing higher freight costs and limited logistics capacity over Easter.

The market for high white grades is also seeing very little movement. According to sources, recent pulp price adjustments have not yet trickled down to the secondary fibre market, partly because supply and demand in this area are currently broadly balanced.

Uncertainty remains high

Sources continue to view the outlook for Germany’s recovered paper market as fraught with uncertainty. The degree of uncertainty has even increased as a result of the war. Sources from the paper industry are worried that consumer spending might tumble again and demand for finished paper might decline again, given the high petrol and diesel prices.

If that happens, demand for recovered paper and prices can be expected to fall again. By contrast, many waste management companies are looking to the upcoming public holidays in May. The resulting tighter material supply, a few contacts argue, might support further increases in recovered paper prices.

EUWID price changes for German recovered paper in 2026		
Price change €/t		March 2026 vs December 2025
Mixed paper and board	(1.02)	± 0.00
Supermarket corrugated paper and board	(1.04)	+ 6.50
Used corrugated kraft II	(4.03)	+ 6.50
Sorted graphic paper for deinking	(1.11)	- 6.00
Coloured letters	(2.06)	- 6.00
Multi printing	(3.10)	+ 4.00
White newsprint	(3.14/3.15)	-7.50
White woodfree uncoated shavings	(3.18.01)	- 6.50
The table presents the cumulative price changes for the named grades in the past three months. Prices: free delivered to paper mills in Germany EUWID assumes no liability for the accuracy of pricing information.		
Source: EUWID		

Price cuts for sawdust deliveries as of April, prices for woodchips remain unchanged in Germany

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The biggest part of negotiations on sawdust and woodchip deliveries on the German market were concluded by the beginning of the second week of April. In contrast to the preceding months, buyers succeeded in pushing through demands for price cuts for saw dust, albeit to differing degrees in some regions. Owing to reallocations amongst buyers and a lower cut volume of spruce throughout the country, however, supply and demand for pulp and MDF woodchips made of spruce remained in equilibrium. Here, the existing prices were rolled over in most instances.

EUWID Price Watch Sawmill Residues Germany					
April 2026					
€/loose m³	16 April 2026	5 March 2026	22 Jan 2026	17 April 2025	% change 2026/2025
Southern Germany					
Woodchips*	19.50 - 23.50	20.50 - 23.50	20.50 - 23.50	16.50 - 20.50	+ 16.2
Sawdust*	18.80 - 20.50	23.00 - 25.00	23.00 - 25.00	14.00 - 19.50	+ 17.3
Northern/Western Germany					
Woodchips*	20.00 - 23.50	20.00 - 23.50	20.00 - 23.50	19.00 - 21.50	+ 7.4
Sawdust*	19.00 - 25.50	21.50 - 25.50	21.50 - 25.50	18.00 - 20.00	+ 17.1
Eastern Germany					
Woodchips*	20.50 - 22.50	20.50 - 22.50	20.50 - 22.50	18.50 - 21.00	+ 8.9
Sawdust*	22.00 - 21.50	22.50 - 24.00	22.50 - 24.00	17.00 - 18.50	+ 16.9
* without bark					
Average prices for sawmill residues sold to industrial clients, ex mill					
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The terms of the latest contracts for sawdust are mostly in the region of four to six weeks, and the number of quarterly contracts is rather low in this particular segment. Contracts for a single quarter generally remained the norm in the case of woodchips.

The increase in freight costs as a result of the war on Iran was a key issue in price negotiation for sawmill residues. From what market players say, higher costs have frequently only been able to be passed on downstream by means of higher product prices. Many customers refuse to accept a separate diesel surcharge or the introduction of a diesel floater.

However, buyers in the pellet industry exerted very heavy pressure on prices for sawdust, despite a relatively high level of production activity by the majority of pellet works. Trade prices for A1 pellets have come under pressure on the German market since the beginning of March, and the first spring stockbuilding drives are due at the end of April, too. In order to create greater room for manoeuvring for the appropriate initiatives by reducing raw-material costs, pellet producers pushed through further price reductions of a similar scale after the first cuts of €10-15/t for deliveries in April/May. Buyers in the wood-based panel industry took pellet producers' demands on board and, in turn, lowered their prices. Owing to substantial cost increases, especially for glues, particleboard producers in particular are trying to reduce their wood-procurement costs. The cuts made for sawdust in western and central Germany have so far turned out to be a little less pronounced than in the south due to lower supply and comparatively high prices in export. The alleged price increases in sawdust in Austria have not had any impact in the south.

Due to the differing development in prices for sawdust and woodchips, sawdust prices are currently selling again €20-30 below those of woodchips in some parts of Germany. In the autumn of last year, the price for sawdust rose above those for woodchips for the first time since the end of 2023. The border region to the Benelux countries remains an exception, however. At over €25/m³ ex works in some places, the market in the west remained governed by comparatively high sawdust and woodchip prices in export and in sales to manufacturers of peat substitutes. Residual wood from Scandinavia recently arrived on the north coast for €200/t free port.

In the case of woodchips, a steady output of pulp to date is ensuring what suppliers and the residual-wood trade see as robust demand. Owing to further increases in prices for industrial softwood in some regions, producers in the wood-based panel industry have opted more heavily for purchasing woodchips again. As a result of the increased cutting of redwoods, competition has sooner risen again for the lower volumes of spruce woodchips.

In the latest quarterly agreements, most contract partners have opted for rolling over prices at the level of the first quarter. As such, the price for pulp/MDF woodchips remains at an average of around €21-22/m³ and €150-160/t ex works. Here, too, the highest prices are being quoted in the west, and the lowest in the southeast. Here, a recent surge in cutting activity by German and French sawmills has led to an increase in available volumes of wood residues, which buyers in the insulation-board industry in particular have used to maintain their prices mostly below the €20/m³ ex works mark.

The supply of sawmill residues has been steadily increasing week by week since the beginning of March. Timber harvesting increased throughout Germany in the first quarter, due not least to the high prices for softwood sawlogs, particularly in privately-owned forests. The sawmilling industry took advantage of the improved availability to strengthen supply, which had previously been described as tense at times. In anticipation of a spring revival in the sawn-softwood markets, cutting was consequently stepped up as well. The majority of market players, however, have their doubts as to whether this will enable producers to make up for the reduction in sawn-softwood production in the fourth quarter as well as in January/February.

Market players believe the further development in prices for residual wood largely depends on the level of cutting activity in the sawmilling industry. At present, the roundwood stocks are sufficient to last for an average of 4 to 6 weeks. As usual for the season, sawlog felling can be expected to be rather low in the private-forest sector in the weeks ahead.

Difficult conditions in China weigh on Sun Paper

 **EUWID +** 22 April 2026 |  ~ 1 min | [Published in issue 17/2026](#)

Shandong Sun Paper, one of China's largest papermakers, operated in a challenging market environment in 2025, according to its latest annual report. The company points to subdued demand, intensifying competition and ongoing price pressure in its core markets. More broadly, the difficult market conditions seen in Europe were mirrored in China, where weak demand, fierce competition and continued capacity additions weighed on prices and margins.

Shandong Sun Paper's sales in 2025 exceeded RMB39bn (approx. €5.1bn), down about four per cent year-on-year, while net income exceeded RMB3bn (approx. €420m), up almost five per cent year-on-year, the report notes.

Paper output increased by 7.5 per cent to 8.1 million t while deliveries were up 6.4 per cent to reach nearly 8 million t in the reporting year. By contrast, pulp output and deliveries fell by 6 and 11 per cent respectively to 1.35 million and 1.3 million t, indicating that actual output remained well below the group's installed capacity, which is reported at over 13 million tpy and includes coated and uncoated woodfree paper, speciality papers, containerboard and paperboard.

The product portfolio revealed differences between the segments. While packaging paper was comparatively stable, sales of graphic paper and pulp declined.

The company expects market conditions to improve in 2026. With the reduction of inefficient capacities and a gradual improvement in the supply-demand balance, business in the industry could stabilise, the report says. At the same time, the focus is to be placed on increasing efficiency, controlling costs and optimising the product structure.

Sappi, UPM remain on track with planned graphic paper JV

 **EUWID** + 22 April 2026 | ⌚ ~ 1 min | [Published in issue 17/2026](#)

Sappi Limited and UPM-Kymmene Corporation are moving ahead with their planned joint venture for graphic papers in Europe. The companies continue to work constructively on the transaction and are aiming to sign definitive agreements in the first half of 2026, Sappi said in a stock exchange filing.

The value of the proposed transaction exceeds 30 per cent of Sappi's market capitalisation and therefore requires approval by an ordinary resolution of Sappi shareholders at a general meeting. The documentation containing full details of the transaction (circular) will only be published after the signing of the definitive agreements.

UPM and Sappi announced the intention to form a 50/50 joint venture at the end of 2025. The planned transaction would encompass UPM's entire Communication Papers business, including eight paper mills and one in USA, and Sappi's European graphic paper business with four mills. Total annual capacity of the graphic paper assets stands at 3.1 million t of publication paper and some 2.9 million t of coated and uncoated woodfree paper.

The transaction was notified to the European Commission in March 2026. The authority is currently reviewing the deal, with a preliminary decision expected by 28 April.

New biomass power plant at Salzer Papier starts up

 **EUWID +** 22 April 2026 |  ~ 1 min | [Published in issue 17/2026](#)

The biomass cogeneration plant announced at the beginning of 2024 on the premises of the Austrian Salzer paper mill has commenced operation. Partners in the project were the city of St. Pölten and Austrian energy company EVN Wärme.

The combined heat and power (CHP) plant produces steam from wood chips in a biomass boiler, according to a press release. Salzer group intends to use the steam to cover production requirements of Salzer Papier, Salzer Formtech and Sunpor Kunststoff. Furthermore, residual heat is fed into the local district heating network. Total investment for the construction of the power plant reportedly amounts to €50m.

According to EVN, the biomass boiler is rated for 56 MW. The heating plant will be operated exclusively with regionally sourced wood chips to reduce transport distances and reduce its carbon footprint of the heat supply.

Salzer's St. Pölten mill produces book paper, woodfree uncoated paper and packaging paper for the food industry.

Solidus invests in packaging production

 **EUWID +** 22 April 2026 |  ~ 1 min | [Published in issue 17/2026](#)

Solidus, Dutch manufacturer and converter of unlined chipboard and coreboard, is stepping up its packaging production with two new printing presses. The company has ordered two six-colour printing presses, which are to be installed at the company's Hoogstraten plant in Belgium and the Dutch site in Oude Pekela. Solidus did not provide any information on the investment amount. The purchase of the new printing presses is a response to growing customer preference for sustainable cardboard alternatives over plastic packaging, which Solidus will add to expand its product portfolio. At the same time, quality standards for printing on solid board packaging are becoming increasingly demanding, the company says.

In addition to three board mills, Solidus operates around ten converting plants and describes itself as a leading supplier in the European market for solid board packaging.

Cost pressure pushes paper producers to ask for price increases in Germany

Intensive price negotiations taking place in CCM and cartonboard markets

 **EUWID** + 22 April 2026 | 🕒 ~ 8 min | [Published in issue 17/2026](#)

In the newsprint market in Germany, producers were able to implement price increases in April but not with their desired amounts. Even though a few buyers say the latest mark-ups are bearable, there is growing uncertainty. However, it appears a shift is occurring in the market, which could result in new price demands being presented.

Further price increases were introduced for brown recycled corrugated case material in April. Some respondents report that new price demands are already being presented for May. By contrast, the price trend for white-top testliner is less uniform so far. In the recycled cartonboard market in Germany, the announced price hikes for GD (white-lined chipboard) and unlined chipboard were being implemented in mid-April – although not necessarily with the originally targeted amounts and not always with the same timing. More – although not yet all – producers of GC (folding boxboard) have announced surcharges. The EUWID market survey conducted in the second full week of April revealed, however, that suppliers are not always adamant about introducing these mark-ups throughout the entire market.

Current situation may drive shift in newsprint market soon

Following the most recent and tough round of price negotiations for newsprint in Germany, several topics are still on the minds of respondents at paper mills, publishing houses and commercial print shops. Industry representatives unanimously confirm that prices were raised throughout the German market for deliveries as of April, usually by €10-25/t. However, market insiders have mixed opinions about what this outcome means and what impact it will have.

Some buyers say the latest mark-ups are ultimately bearable. Others criticise that the pressure applied by some suppliers makes things difficult for the print sector. Several players on the buyers' side believe the latest agreement is just the calm before the storm. Even with the newest price step, the paper industry has not managed to sustainably improve margins and the ongoing profitability problems could prompt paper mills to ask for more price increases.

Industry experts confirm that the price increases announced as of April or the second quarter of 2026 were not implemented consistently across Europe. There is a need to catch up in some markets, they explain. However, the survey of players in the German market revealed a fairly uniform pattern: Price hikes took effects for basically all players. The agreements signed are often

valid for shorter terms of only one or two months.

Many paper industry representatives expressed dissatisfaction with the outcome. As many producers are reporting lacklustre financial results, or even losses, prices need to reach a sufficient level – and this was not achieved in the April price round, EUWID was told. Paper producers are simply unable to absorb the additional costs that have arisen in recent weeks, say industry representatives.

Buyers, on the other hand, criticise the lack of reliability with respect to prices and point out that both publishers and commercial printers are also in a tough situation, as both production and distribution of print products have become far more expensive.

Buyers warn that the implemented price mark-ups have created a risk of further demand contraction and may pave the way for additional price hikes.

Paper producers say prices of €650/t would cover costs and €700/t would be profitable. Talking about the special conditions being granted for large print objects in the commercial printing segment, paper mills will not be able to maintain these so-called project prices for heatset newsprint in the long term. The gap to contract prices needs to be closed very soon, paper industry representatives stress.

Paper producers are concerned not only about the wide spread of prices but also about insufficient margins. In addition, industry experts confirm that production costs for heatset paper are actually higher than those for coldset paper.

In advance of the most recent price round, publishing houses and commercial printers had signalled their resistance against a price increase, arguing that the print sector is also facing cost pressure. They say prices are rising dramatically throughout the production process, including for ink, printing plates, chemicals and energy. Many printing firms say the situation is becoming increasingly difficult.

Respondents agree that commercial printing companies are facing cut-throat competition to secure print orders, which means they have barely any room to negotiate their own price increases. Media companies are also facing challenges. The two main revenue streams for newspaper publishers – advertising sales and circulation – have been affected by structural changes as well as the recent deterioration in the economic environment. Many media firms have reportedly been missing their sales and margin targets so far this year. The situation is worse than forecast in their planning, players say. For example, there is a steeper-than-expected drop-off in advertising volumes, EUWID was told. The traditional newspaper business continues to shrink and the rising cost of distribution logistics is a heavy burden. And although media companies continue to see growth in their digital businesses, margins here remain small. Accordingly, buyers are calling for greater reliability and stable prices from the paper industry.

Paper mills say they aim to be reliable partners, but this requires that the deals be economically viable. Several players report that activity levels at the paper mills had improved significantly in March and capacity utilisation in April could again exceed 90 per cent, so it looks like there may be a better chance of introducing market-driven upward price adjustments.

Price hikes for recycled corrugated case material go through in April

After initial hikes of €40/t for brown recycled corrugated case material in early March – even before the impact of the Iran war – it soon became clear that this would only be a first step towards the originally targeted figure of €80-100/t.

After the war started, new announcements of up to €100/t were presented in mid-March, to take effect as of 1 April. These represented the second step of the March adjustment as well as unplanned additional increases due to higher energy costs. Of the originally targeted amount, some €60/t was implemented in April, according to market participants.

And now, in the current month, new announcements of hikes of as much as €100/t for brown corrugated case material are being presented to the market. These are scheduled to take effect from 1 May. However, reports were not entirely consistent, as some converters told EUWID that they had not received this notice, while others said the latest price demand had been temporarily shelved.

There was also a mixed picture regarding adjustments for white-top testliner in the current month. While uncoated white testliner became €40/t more expensive, prices for coated grades were moving sideways. For the latter grades, there were also calls for price increases of €100/t as of May, coming in the wake of the announcements for brown recycled CCM.

The Iran war is not having any noticeable impact on demand at the paper mills. And the price announcements are apparently only motivating a handful of customers to move forward orders in an attempt to secure paper at the old prices. However, such moves are being rejected by the paper producers anyway.

Sellers not always determined about mark-ups for GC

On the German market for recycled cartonboard, buyers from the folding carton industry say they have now received pricing announcements from all major relevant suppliers – for GD (white-lined chipboard) as well as unlined chipboard. A few board producers had introduced very last-minute hikes either as of late March or as of April. Simultaneously, there were also announcements for unlined chipboard that were set to take effect from mid-month deliveries.

The latest market survey found that price hikes have already been implemented for GD 2 in April. However, according to respondents, the range of price hikes that took effect was nowhere near to the originally targeted amount, which was usually around €70/t or eight to ten per cent. At the same time, certain GD producers' announcements were only implementation as of 1 May.

Overall, it appears that cartonboard mills were only able to implement higher prices with customers whose quarterly contracts were expiring at the end of March. Catch-up adjustments will be necessary for those folding carton producers which had agreed to half-year contracts during the annual talks, suppliers say. Despite the current dynamic situation, existing contracts were left untouched even though board producers stress that price increases will be urgently necessary in the near future.

It is a similar picture for unlined chipboard. Industry insiders reported that the price hikes had already been agreed, and some

were already implemented in April. However, the timing of the mark-ups is not entirely uniform, the market survey found. Some market players say the hike was split into two steps to be implemented in April and May, or postponed entirely to 1 May.

Meanwhile, producers of GC (folding boxboard) appear to be taking varying approaches in Germany. Since the last EUWID market survey, more suppliers have announced surcharges due to increased energy and logistics costs. A few players have reportedly announced planned increases to base prices, but in contrast to the recycled board market, it appears that most suppliers are not taking this approach.

Insiders explain that this is because the contracts have longer terms, with prices fixed often until the end of June or even until the end of the year. Temporary surcharges, on the other hand, can be negotiated and implemented with less notice, according to market experts. However, not all suppliers are on board with this attempt: In the middle of April, some major producers had still not approached the market with any price hike announcements. As of the second full week of April, however, one major GC producer announced transport surcharges of €35/t as of 4 May.

And as of mid-April, it looks like the surcharges have not yet been implemented throughout the entire market. According to packaging producers, this is partly because not all producers have formulated their announcements. Moreover, players told EUWID that some cartonboard mills have decided to postpone the mark-ups so as not to lose any contracts to their competitors. There were only scattered reports that negotiations had been concluded.

Bvse continues to push for end-of-waste status for recovered paper in Germany

Recycling industry association warns of quality losses from new packaging

 **EUWID** + 22 April 2026 | 🕒 ~ 2 min | [Published in issue 17/2026](#)

The German recycling association Bvse has flagged end-of-waste status and new packaging designs as key challenges for paper recycling. At the International Recovered Paper Conference in Berlin in April, Mike Hayes, chairman of bvse's paper recycling division, reiterated the push for end-of-waste status and warned that recent packaging trends are undermining material quality. Both issues, he said, remain central challenges for the industry.

On the product status of recovered paper, Mr Hayes made clear that the issue remains firmly on the agenda. "End-of-waste status for recovered paper remains a live topic and will likely stay with us for some time," he said. While similar efforts at EU level have failed, the association continues to push at national level for sorted recovered paper to be removed from the waste regime. Mr Hayes argued that recovered paper is a "valuable raw material" with stable domestic and export markets and is therefore "de facto a product". However, whether this view can be translated into regulation remains uncertain. "Time will tell whether we can break down the walls of bureaucracy at national level."

Mr Hayes also drew attention to the impact of new packaging design requirements. Under the European Packaging and Packaging Waste Regulation (PPWR), new recyclability standards to ensure recyclability are set to apply from August. He criticised the dominance of packaging manufacturers in standardisation bodies and called for only genuinely recyclable products to be placed on the market.

Mr Hayes identified fibre-based composite materials as particularly problematic because they reduce the share of pure paper in the material stream and are regarded as contaminants by many mills. "If we are serious about closed material loops, there can be no room for greenwashing," he stressed. Moreover, he advised against suggestions that conventional paper recycling processes can absorb unlimited amounts of these materials.

Mr Hayes said the impact is already becoming evident in practice, with declining input quality placing increasing pressure on sorting operations and making the economic processing of collected recovered paper more difficult. He also pointed to unresolved questions over cost allocation when mills reject sub-standard deliveries, warning that recyclers risk being "held responsible through no fault of their own". Mr Hayes stressed the need for clear and practical design standards. Assessments of recyclability should be based on widely available technologies and existing infrastructure rather than laboratory conditions, he said, also calling

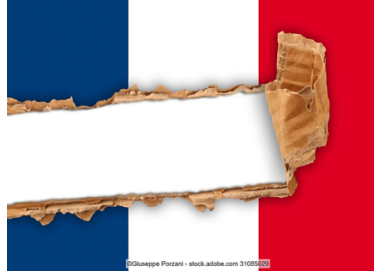
on municipalities and producer responsibility organisations for packaging to play a greater role in improving recovered paper quality.

French paper and board production stagnates in 2025

Copacel warns of growing problems in the French paper industry

 **EUWID +** 21 April 2026 | [Valeria Buß](#) |  ~ 7 min | [Published in issue 17/2026](#)

France's paper and cartonboard industry proved to be relatively stable in 2025 in what remained a challenging economic climate. Mills in the country produced 6.5 million t of paper and board last year, a marginal decline of 0.1 per cent compared with 2024. However, the growing number of mill closures and the strained



situation facing a few companies in early 2026 are cause for concern for French industry association Copacel. Presenting its 2025 industry report, the association warned of a loss of the sector's competitiveness and called for political action to address the industry's mounting problems.

The association stressed that seven of France's 81 paper mills have closed since the beginning of 2024. According to information available to EUWID, the mills in question are the RDM Group's Blendeques cartonboard mill, the corrugated case material mills Papeterie Saint-Michel, Smurfit Westrock Alfa d'Avignon and Wizpaper, as well as the speciality paper mills Stenpa, Ahlstrom Bousbecque and most recently Lecta Condat. The latter is to continue operating as an industrial park but has laid off the majority of its employees. Two more manufacturers –corrugated case material producer Gemdoubs and coreboard producer Cenpa – are currently in receivership, and the future of pulp manufacturer Fibre Excellence is still hanging in the balance. According to Copacel, Fibre Excellence's two mills account for 30 per cent of France's total pulp output.

"This is a worrying state of affairs," the association said in summary. For a country that was already a net importer of pulp, paper and board, this represented a loss of self-sufficiency.

Copacel listed lower selling prices, weak capacity utilisation and rising production costs as the main factors driving this situation. Yet, the association stressed that the tough situation facing mills cannot be simply explained by dwindling paper and cartonboard consumption in France. Copacel felt that current problems also stemmed from French companies' struggle to remain competitive on the international stage.

Copacel said that structural competitive disadvantages were the main root cause. Lots of paper from Asia was reaching Europe at dumping prices. This effect was compounded by US tariffs, which were diverting additional volumes onto the European market. Europe needed to better protect itself, the association said, calling for trade policy protection tools, such as tariffs, to be considered.

Copacel also highlighted domestic location disadvantages in France itself, including high taxes on production, hefty energy costs and complex administrative procedures. Taken together, these factors led to higher production costs than in other countries and must be reduced if more mill closures in France were to be averted, the association concluded

2025 was an unexceptional year

Copacel described developments in the French paper and board industry and in the French economy as a whole last year as mixed. The country's gross domestic product increased by 0.9 per cent, lagging behind the EU average, and industrial activity likewise only staged a slight recovery. The paper and cartonboard industry booked a 15 per cent drop in production in 2023, followed by a 2.4 per cent rebound in 2024, before production volumes stayed flat at 6.5 million t in 2025, still some way below the pre-crisis level.

Copacel said that this apparent stability in output masks structural changes within the sector. As described, several paper mills have closed their doors since 2024, but three new machines have been commissioned. These capacity changes ultimately resulted in a stable production level, the association reported.

Looking at the different segments, it becomes apparent that packaging paper and cartonboard production fell by 1.2 per cent compared with 2024 to land at around 4.5 million t last year. This slump is primarily connected to the downturn in cartonboard and flexible packaging paper production. In spite of positive momentum from the pharmaceutical product markets, demand for cartonboard had cooled on the whole due to factors including lower liquid packaging consumption and the fact that consumers were buying more from discount retailers, which used more plastic packaging, Copacel pointed out. The closure of RDM's Blendeques cartonboard mill in 2024 also left its mark on the country's production, which was 8.1 per cent lower than in 2024.

Copacel described the European cartonboard market as still being shaped by surplus capacity and surplus supply, especially since new capacity had been added and imports from Asia were pushing into the market. After French cartonboard prices edged a little higher in the first half of 2025, they receded later on in the year, the association says. Copacel stated that average cartonboard prices had increased by 2.5 per cent in the year as a whole.

Corrugated case material output slightly higher thanks to new capacity coming online

Dwindling demand was also leaving its imprint on the market for corrugated case material. Consumers were still cautious in their spending, which meant that less food packaging was being used – the most important end-use market for this paper. Nonetheless, corrugated case material production edged 0.2 per cent higher between 2024 and 2025, something that Copacel attributed to the start-up of Norske Skog's new machine in Golbey and the gradual increase in capacity utilisation at the machine that VPK Group

commissioned in Alizay in 2023. The previously mentioned capacity closures over the past two years had partly cushioned this effect, though.

An increase in corrugated case material prices in the first half of 2025 was largely cancelled out later on in the year. Copacel said that the average price for corrugated case material climbed by four per cent over the full year.

Demand for graphic paper heads eight per cent lower across Europe

French graphic paper production suffered another setback last year, with a two per cent decrease to 770,000 t. Copacel underscored a 7.9 per cent fall in demand in Europe and thus weaker machine capacity utilisation in France, too. Manufacturers' margins felt the squeeze, especially since prices for printing and writing paper and newsprint had decreased in Europe last year, the report states. A large amount of paper from Asia had been offered at low prices. Copacel said that a total of 1.2 million tpy of capacity had been removed from the European graphic paper market last year. However, the association also felt that additional cutbacks were needed.

At a European level, last year also brought a slight dip in sanitary paper consumption. By contrast, sanitary paper production in France grew by 7.5 per cent to 889,000 t compared to 2024. Copacel noted that the country had added new tissue paper capacity in recent years. For instance, Lucart invested in a new tissue machine and converting lines, while MP1865 also started up a new tissue machine. Copacel said that manufacturers in the sanitary paper segment were caught between high costs and the difficulty of pushing through price increases for their own products because of intense competition. In the medium term, however, the outlook for this segment was positive, and growth was expected in Europe, the association added.

In a longer-term perspective, structural change in the French paper and board industry is continuing: Graphic paper production is in decline, while packaging grades are gaining ground. As Copacel pointed out, graphic paper still accounted for 45 per cent of total production in France in 2005. By 2025, it had dropped to just below 12 per cent. Over the same period, the share of packaging paper and board swelled from 43.5 per cent to almost 70 per cent.

Demand, imports and exports head lower

Apparent paper and board consumption in France was down 1.2 per cent in 2025 compared with 2024. The industry also came under financial pressure, with market players reporting a downturn of almost three per cent in revenues to €5.6bn in 2025, something that Copacel blamed on dwindling sales prices, in particular.

Against the backdrop of weaker demand, France's paper and board imports also decreased by 3 per cent to 4.2 million t last year. Exports also slipped, declining by 1.3 per cent to 3.5 million t. Nonetheless, France's paper industry remains distinctly export-driven: 54 per cent of the country's output was exported, with Germany alone accounting for 25 per cent.

Dunapack to acquire Stora Enso's corrugated business in Germany

 **EUWID** + 20 April 2026 | [Konstantin Stoll](#) | ⌚ ~ 1 min | [Published in issue 17/2026](#)

Dunapack Packaging has reached an agreement with Stora Enso to acquire its German corrugated packaging plants. The transaction, announced by the Prinzhorn Group on 17 April, remains subject to antitrust approval and is expected to close in the course of 2026.



The deal comprises Gaster Wellpappe, Wellpappe Sausenheim and PTI, including all associated sites in south-west Germany. The businesses employ around 350 people and generated approximately €74m in sales in 2025.

Prinzhorn Group CEO Gerald Prinzhorn said that the acquisition forms part of Dunapack Packaging's growth strategy, strengthening its regional footprint while increasing the group's level of paper integration.

According to Stora Enso, Sausenheimer Wellpappe in Grünstadt employs around 210 people and has an annual capacity of 52 million m² of corrugated board. Its product portfolio includes corrugated sheets and packaging.

Gaster Wellpappe operates sites in Heidelberg and Augsburg. The company was acquired by Dutch corrugated packaging producer De Jong Verpakking in 2018 and came into the possession of Stora Enso in early 2023 as part of the Swedish group's takeover of [De Jong Packaging](#). Gaster Wellpappe produces corrugated rolls, sheets and packaging solutions, and employs around 169 people. According to Stora Enso, its annual production capacity amounts to around 69 million m² of corrugated board.

PTI Packmitteltechnik, based in St Ingbert, manufactures packaging made from corrugated and solid board, according to its own information.

Stora Enso is currently in a quiet period and did not respond to an inquiry from EUWID.

IP targets Norpac acquisition to bolster North American business

17 April 2026 | 🕒 ~ 1 min | [Published in issue 17/2026](#)

International Paper has agreed to acquire North Pacific Paper Company (Norpac) from One Rock Capital Partners for \$360m. The deal is subject to regulatory approval.

Norpac operates a paper mill in Longview in the US state of Washington, employing around 500 people. The site runs three paper machines and produces roughly one million [short] tonnes of containerboard and other paper grades per year, according to IP

The mill is expected to be integrated into International Paper's existing production network. The acquisition is intended to increase operational flexibility, reduce costs and expand capacity for recycled containerboard.

International Paper said the transaction would strengthen its presence on the US West Coast. The acquisition follows the announcement by [IP to split into two publicly traded](#) entities in North America and EMEA.

One Rock Capital Partners had acquired Norpac in 2016 and [shifted the business from publication to packaging papers](#). One Rock said the transaction with International Paper reflects "the value created at Norpac and positions the company for further development as part of a larger platform."



IP's acquisition of Norpac will sharpen the group's focus on business in North America

Leipa announces further price increase for its graphic papers

16 April 2026 | 🕒 ~ 1 min | [Published in issue 17/2026](#)

Leipa announced a further price increase for its whole range of graphic papers.

The company said that due to the unexpectedly deteriorated global economic situation and increased costs it had to set an additional price increase of €50/t effective 1 May 2026. In the graphic paper segment Leipa mainly sells recycled LWC.

Fibre Excellence files for insolvency, but remains hopeful of a rescue

 **EUWID** + 16 April 2026 | [Valeria Buß](#) | ⌚ ~ 2 min | [Published in issue 17/2026](#)

French pulp manufacturer Fibre Excellence filed for insolvency with the commercial court of Toulouse on 13 April and is now facing receivership proceedings.



The conciliation period with the government expired on 14 April and has not yet yielded a solution for the financially stricken company. Due to its strained liquidity situation, the company had therefore been obliged to file for insolvency, Fibre Excellence explained in a statement. The statutory deadline for this expired on 15 April. The court would deliver its ruling on 27 April regarding the continuation of operations, the company explained.

According to the company, production at the two pulp mills Saint-Gaudens and Provence is currently continuing.

Government presents proposals for support

Fibre Excellence remains optimistic about finding a solution together with the government in order to maintain its business operations. The company reported that the French Minister for Industry presented new proposals to support the company on 10 April. These include, amongst other things, an adjustment to the state-regulated feed-in tariff for electricity from biomass, a measure [previously requested](#) by the company but initially rejected by the government. The company, which generates its own electricity, had described this measure as particularly urgent due to the high cost of wood.

The ministry also indicated a possible entry of the Occitanie region into the company's capital, while stressing the need for a binding commitment by Fibre Excellence to an investment plan.

Fibre Excellence views the ministry's proposals as a positive signal for the future. The company said it is currently assessing their impact on its economic viability.

Meanwhile, French trade union Force Ouvrière (FO) organised a day of strike action at the Provence mill to highlight the precarious situation. More than 500 jobs are at risk if the company's two pulp mills were to close. Fibre Excellence recently commissioned financial advisory group Rothschild & Co to [search for potential buyers](#) for the two sites. The Saint-Gaudens mill has a capacity of 280,000 tpy of bleached softwood and hardwood pulp, while the Provence mill in Tarascon can produce up to 220,000 tpy of unbleached softwood pulp.

This article was updated on 21 April to include new information on the insolvency process.