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Expansion of production capacity for folding boxboard is drawing to a close

Further closures for recycled grades in Germany and Europe

EUWID + 10 June 2026 | ~ 5 min | Published in issue 24/2026

In the European cartonboard industry, the wave of capacity expansions for folding boxboard (FBB) seen in recent years is drawing to a close. Projects focusing either on converting paper machines to board or modernising existing facilities are still being implemented – foremost among these is the start-up of Stora Enso's converted board machine in Oulu: With a planned nominal capacity of 750,000 tpy, it is the largest increase in FBB capacity in recent years. At the same time, the FBB market 2025/2026 is characterised by increasing overcapacity, the impact of US tariffs and import pressure from Asia. By contrast, capacities continue to decline in the market for recycled cartonboard, where plants have already been closed in recent years.

The biggest change in output capacity for recycled board in 2025 was the closure of Reno De Medici's (RDM) Castellbisbal board mill near Barcelona in Spain. RDM had already announced plans to this effect in January of the previous year. The Italian company concluded talks with employee representatives in the summer of 2025 and finally ceased production in June of the same year. According to the company, the closure process was completed following the conclusion of redundancy procedures in June 2025. With the closure, RDM took 190,000 tpy of recycled cartonboard – the portfolio included GD and GT – from the market. The company had already idled production at its Blendecques mill in France in the summer of 2024.

In a statement, RDM attributed the closure of Castellbisbal to increasingly difficult market conditions. The company has sold the plant's associated real estate, although the completion of the transaction is still subject to the fulfilment of certain conditions, a spokeswoman told EUWID.

In Italy, availability of GD (white-lined chipboard) was also reduced following FM Cartiere's decision to cease production of GD and instead shift its portfolio to uncoated grades such as unlined chipboard in grammages between 200 and 400 g/m². FM Cartiere operates one board machine with a maximum capacity of around 80,000 tpy. According to earlier reports, the company planned to start producing greyboard in April/May 2026. Prior to this, the plant had been idle.

In Germany, there have been adjustments to greyboard output last year. Carl Lenz, for instance, closed its plant in mid-2025. According to earlier reports, the Carl Lenz board mill, with a total of 18 employees, produced unlined chipboard in grammages ranging from 180 to 350 g/m². The company put its production capacity as 20,000 tpy.

Solidus also responded to difficult market conditions and confirmed the closure of the Bad Nieuweschans board mill in the Netherlands in June 2025 in order to optimise efficiency and capacity utilisation. The company, which produces and converts solid board and coreboard, said it planned to transfer the site's output to other plants. According to EUWID information, capacity at Bad Nieuweschans amounts to around 145,000 tpy. According to earlier figures, the company previously had a total production capacity of around 410,000 tpy for greyboard and coreboard across its five board mills.

Capacity changes also occurred at the Mondi Group last year. After the paper and packaging group had integrated the Schwarzenberg and Kaierde board mills as part of its acquisition of Schumacher Packaging's Western European assets, the group sold the Kaierde plant back to its former owners. Kaierde produces unlined chipboard and brown recycled board with a capacity of 25,000 jato.

Increasing FBB supply meets with weak demand in Europe

In the market for folding boxboard, quantifiable capacity increases resulting from the latest expansions amount to around 960,000 tpy, particularly for GC. Including Burgos's previous entry into the market in 2024, the net increase even amounts to over 1.1 million tpy. In contrast, according to EUWID information, the capacity reduction due to closures totals over 200,000 tpy.

At the same time, GC board suppliers were pointing to increased pressure on volumes in Europe last year. Several manufacturers unanimously emphasise in their financial reports the view that the market in Europe is burdened by structural overcapacity – triggered by recent capacity expansions and the reversal of trade flows following the introduction of US import tariffs. Increasing import pressure from Asia for GC board also played a role. For instance, Metsä Board explicitly refers in its 2025 annual report to a "destabilisation of the market in Europe" caused by the rise in board imports from China.

At Stora Enso in Oulu, the ramp-up of the rebuilt board machine with a target capacity of 750,000 jato is underway. Stora Enso recently confirmed that full capacity is expected to be reached in the course of 2027. The machine's production volume has recently increased gradually, Stora Enso reported as part of its Q1 results. The plan is to produce GC 1 and GC 2 as well as kraft board.

FBB and white-top kraftliner producer Metsä Board has also increased machine capacity in recent years – although the company had previously decided against plans for a new 800,000 tpy board machine at its Kaskinen mill. At the same time, the ramp-up of the capacity expansion at its integrated pulp and board mill in Husum, Sweden, is in its final phase. According to earlier statements by the company, the additional 200,000 tpy after the modernisation of the paper machine in Husum should be fully available on the market by 2026. When asked by EUWID, Metsä Board did not comment on the current status of the Husum mill.

At the Finnish Simpele board mill, where the company primarily produces GC 2, Metsä has completed its investment project. The modernised board machine has been fully operational since then and now has a potential output of 310,000 tpy, representing an increase of 10,000 tpy.

In contrast, Metsä Board ceased production at the Tako board mill, which was designed for GC 1, for example for cigarette packaging, on 17 June, thereby removing a total of 210,000 jato from the market. Production was subsequently relocated to the Kyro board mill, the company explained.

Although Mayr-Melnhof's capacities in Kolicevo remained unchanged in 2025, MM confirmed to EUWID last summer that it would cease production of coated kraftboard on the site's swing board machine "for market reasons". The group did not provide further details on the capacities that had become available.

Major capacity changes in the European cartonboard industry 2025/2026

Company	Plant	Capacity (tpy)	Grades	Comment	Date

Company	Plant	Old	New	Grades	Comment	Date
Carl Lenz	Wehr, Germany	20,000	0	Grey board	Closure	June 2025
FM Cartiere	Momo, Italy	80,000	80,000	GD, grey board	Conversion	April/May 2026
Mayr-Melnhof	Kolicevo, Slovenia	300,000	300,000	GD, GC, CKB	Portfolio restructuring	Mid 2025
Metsä Board	Simpele, Finland	300,000	310,000	GC	Upgrade of BM	October 2025
Metsä Board	Tako, Finland	210,000	0	GC	Closure	June 2025
Metsä Board	Husum, Sweden	400,000	600,000	GC, foodservice board	End of ramp-up	2026
Mondi	Delligsen, Germany	75,000	50,000	Grey board	Sale Kaierde	June 2025
Reno de Medici	Castellbisbal, Spain	190,000	0	GD, GT	Closure	June 2025
Solidus	Bad Nieuweschans, Netherlands	145,000	0	n. a.	Closure	n. a.
Stora Enso	Oulu, Finland	0	750,000	GC, CKB	Ramp up BM 6	2027
Sappi	Alfeld, Germany	n. a.	n. a.	SBS	Closure of PM1	Late 2025

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Source: EUWID, company figures

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Restraint in cutting operations reducing supply of sawmill residues

Sawdust prices more stable, further increase in woodchip spot prices

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In the German sawmill residue markets in May, mostly stable consumption in the relevant recipient industries coincided with unexpectedly heavy production cuts within the softwood sawmilling industry. Supply therefore declined from the middle of the month onwards.

EUWID Price Watch Sawmill Residues Germany
May/June 2026

€/loose m³	5 June 2026	16 April 2026	5 March 2026	30 May 2025	% change 2026/2025
Southern Germany					
Woodchips*	19.50 - 25.00	19.50 - 23.50	20.50 - 23.50	16.00 - 19.50	+ 25.4
Sawdust*	18.80 - 20.50	18.80 - 20.50	23.00 - 25.00	13.50 - 17.50	+ 26.8
Northern/Western Germany					
Woodchips*	20.50 - 25.50	20.00 - 23.50	20.00 - 23.50	18.50 - 20.50	+ 17.9
Sawdust*	19.00 - 25.50	19.00 - 25.50	21.50 - 25.50	16.50 - 19.00	+ 25.4
Eastern Germany					
Woodchips*	20.50 - 23.50	20.50 - 22.50	20.50 - 22.50	17.50 - 19.50	+ 18.9
Sawdust*	19.00 - 21.00	20.00 - 21.50	22.50 - 24.00	15.00 - 16.50	+ 27.0

* without bark
Average prices for sawmill residues sold to industrial clients, ex mill
EUWID assumes no liability for the accuracy of pricing information

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Considerable logistical problems also arose as a result of the bank holidays in May. Due to limited availability of freight space, originally planned deliveries were processed with a delay, if at all. These factors led to brief bottlenecks in the supply of raw material at a few facilities and to delays in the already rather slow progress in building up stocks for summer.

Due to the imbalance in supply and demand, stability has been restored to sawdust prices, which had come under downward pressure in March and April. In the case of pulp/MDF woodchips, competition in purchasing became even more intense, contributing to further increases in prices for spot lots. As there is also no immoderately high supply of industrial softwood, the sawmill residues market appears to be regaining a certain degree of dynamism towards the middle of the year.

Negotiations on contracts for sawmill residue deliveries in the third quarter are now underway. Suppliers have already announced that they want to discuss price increases. Although the subject of reversing the price cuts of around €10-15/t agreed for sawdust for April has been brought up by sawmills in the last few days, there were no indications yet that this would happen as this issue went to press.

Owing to persistently weak market conditions on the domestic and foreign sawn softwood markets market players are not anticipating any significant increase in the below-average level of cutting activity for the time being. As a result of the poor delivery figures in the last few weeks, many facilities' sawn softwood stocks are currently higher than average. At least for another few weeks, stocks of finished goods are still standing in the way of an increase in cutting despite a mostly adequate supply of roundwood at present.

Aside from this, some sawmilling companies are toying with the idea of extending the stoppages scheduled for the summer holidays. Besides halting production completely by the week, cutting out or shortening shifts for several weeks and more is also topic of discussion. Any concrete decisions are more likely to be made at short notice, however.

Market players are working from the assumption that the imbalance between supply and demand on sawmill residue markets that was already noticeable in May could well become more evident in June. The forecasts for demand currently at hand from recipient industries for the third quarter and the second half year of the year do not indicate a significant decline in volume compared to the second quarter.

Initial price negotiations on deliveries in July and the third quarter are already underway. Market players are reporting considerably earlier timing for price talks than in previous quarters. On the basis of the statements heard to date, representatives from the sawmilling industry are likely to ask for higher prices for both sawdust and pulp/MDF woodchips. Owing to undiminished high roundwood prices and, on average, practically unchanged selling prices on the domestic and foreign sawn softwood markets recently, there has been further pressure on the sawmilling industry to bring about an economic improvement by means of higher proceeds from residual wood.

As no final decisions on possible production cuts have been made yet in many instances, it is likely that many of the statements made by sawmilling enterprises regarding their expected supply of residual wood are still subject to change.

In contrast, the residual wood processing industry sees no leeway for higher raw material prices because of cost increases for other preliminary products and logistics as well as problems with sales volumes and getting higher selling prices accepted for its own products. Due to widely diverging positions of the contract partners, negotiations are expected to be rather tough.

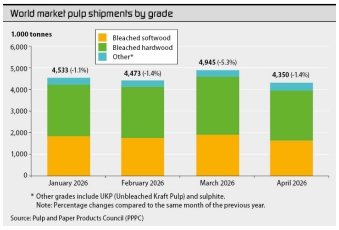
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Europulp reports further decline in pulp port stocks

EUWID + 10 June 2026 | ~ 1 min | Published in issue 24/2026



Inventories of woodpulp at European ports declined again in April 2026 compared with the previous month. According to Europulp, total stocks stood at 1.21 million t at the end of the month. This was around 6 per cent lower than in March 2026 and as much as 10 per cent below the level recorded in the corresponding month of 2025.

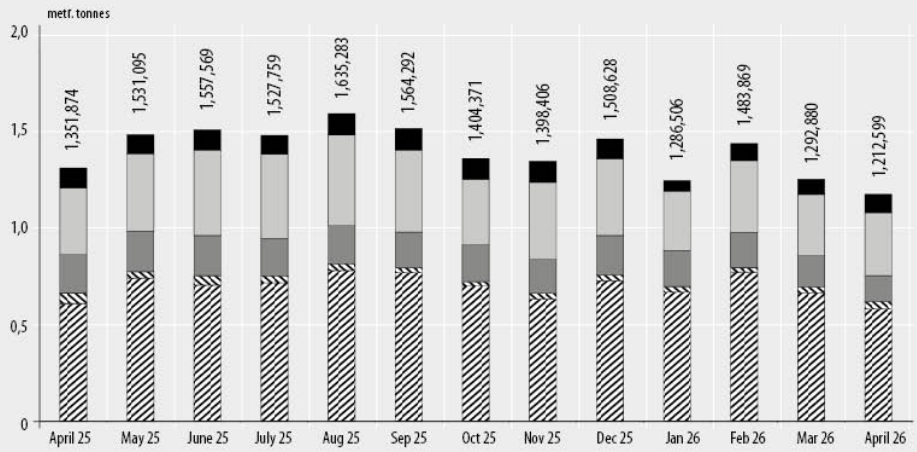
Regional developments remained mixed. The most pronounced declines were reported in Germany and in the regional cluster combining ports in the Netherlands, Belgium, France and Switzerland. In Germany, inventories fell by around 16 per cent month-on-month to 138,000 t. In the Netherlands/Belgium/France/Switzerland port cluster, stocks decreased by approximately 12 per cent to 601,000 t.

By contrast, higher inventory levels were recorded in other European ports. In Italy, stocks rose by 2 per cent month-on-month compared with the previous month to 336,000 t. In Spain, inventories increased by around 22 per cent to 99,000 t. In the United Kingdom, stocks were up by approximately 16 per cent from March, reaching just under 39,000 t.

Market pulp shipments to Europe were 11 per cent lower in April than in the previous month, according to PPPC data. Compared with the same month last year, however, deliveries to Europe were down by only 1 per cent.

Stocks of woodpulp in European ports

April 2025 - April 2026



		April 26	March 26	April 25
	ES	98,612	80,698	104,776
	IT	335,997	328,627	357,996
	GER	138,090	164,503	204,319
	GB	38,886	33,616	56,058
	NL/BE/FR/CH	601,014	685,436	628,725
	Total	1,212,599	1,292,880	1,351,874

Source: Europulp

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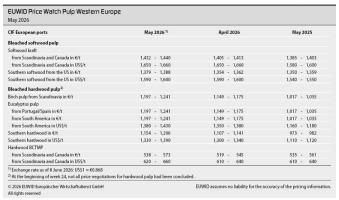
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Buyer resistance increases, but hardwood pulp remains firm

Pressure mounts for further capacity adjustments in the NBSK market

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The latest price negotiations in the European pulp market have taken unusually long to conclude. While monthly pulp prices are often settled only in the first days of the following month, it is rather unusual that no clear picture had emerged even by 8 June. Market participants attribute this delay partly to the numerous public holidays and bridge days in various European countries in the last week of May and the first week of June. At the same time, the latest price increase demands encountered stronger resistance than in previous months. Many buyers apparently saw little urgency in quickly concluding negotiations over May list prices, meaning that the final outcome was still unclear at the time of writing.

This was particularly evident in the market for bleached eucalyptus kraft pulp (BEK). Numerous discussions regarding the announced price increase of $50/t for May were still ongoing at the beginning of week 24. Market participants reported considerable reluctance among customers to accept higher prices, especially in Italy. According to market sources, pulp buyers have meanwhile received offers reflecting roughly half of the originally requested increase. Several buyers have so far remained unimpressed and continue to adopt a wait-and-see approach.

Nevertheless, developments across the European market suggest that BEK pulp suppliers will ultimately succeed in implementing a larger part of their latest price hike demands. Market contacts reported list prices ranging from $1,410/t to $1,430/t. Depending on the supplier, this would represent increases of between $30/t and $50/t compared to the previous month.

BEK pulp suppliers continue to justify their demands by pointing to low inventories and tight supply conditions. The situation in international shipping remains challenging. Logistics problems are also increasing within Europe, while additional volumes are hardly available at short notice. One seller emphasised that current market developments in Europe are becoming increasingly decoupled from those in China.

According to buyers, hardwood pulp supply remains tight. At the same time, however, there are increasing signs of weakening demand. The willingness to accept further price increases is limited by the difficult economic situation faced by many paper mills. Market participants point out that higher pulp costs can only be passed on with difficulty in numerous paper grades. In addition, developments in the BEK spot market are providing arguments against further price increases. Despite the limited availability of spot volumes, some market participants report that spot prices in Europe have declined by around $20-30/t as of lately.

NBSK prices remain unchanged, but pressure on producers increases

Developments in northern bleached softwood kraft pulp (NBSK) were considerably calmer in May. Market sources reported unchanged list prices of $1,650-1,660/t. Many market participants also expect these price levels to remain in place in June. Although higher prices are generally considered necessary given the strained profitability of many producers, no suppliers are currently pursuing fresh price increase initiatives following unsuccessful attempts to implement increases earlier in the spring. At the same time, no significant downward price pressure was reported at the beginning of June either.

The overall market environment for softwood pulp remains challenging. Spot business continues to be under pressure, with substantial price differences being reported between individual suppliers. Market participants also point to the ongoing weakness in China, which is viewed as a burden on the global softwood pulp market.

Industry estimates suggest that roughly 40 per cent of global NBSK producers are currently selling below their production costs. Market participants particularly point to high wood costs in Sweden, Finland and Central Europe, which are increasingly undermining the competitiveness of producers in these regions. Despite this highly strained situation, however, market-driven capacity adjustments have so far remained limited.

Attention was drawn in May to the announcement by Stora Enso that it will permanently close one NBSK pulp production line at its Skutskär mill in Sweden. Industry observers describe the move as merely “a drop in the ocean”, however. The affected fibre line has a capacity of only 100,000 tpy. The shutdown is scheduled to take place in the third or fourth quarter this year.

Production at the Joutseno pulp mill in Finland, operated by Metsä Fibre, has already been suspended since the end of March. The facility has an NBSK capacity of up to 690,000 tpy. The company has not yet announced a date for restarting production.

The future of Fibre Excellence also remains unresolved. Production at the company’s two French pulp mills, Saint-Gaudens and Provence, which together are capable of producing up to 500,000 tpy of softwood and hardwood pulp, remains suspended. The company’s management has meanwhile submitted a takeover proposal for the sites. However, industry sources remain sceptical about the prospects for a successful transaction.

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Industry associations call for cap on grid charges

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In a joint statement, the Confederation of European Paper Industries (Cepi), together with eight other associations, is calling on the EU to introduce a cap on network tariffs for energy-intensive industries. Competitive and reliable access to clean electricity is a prerequisite for securing the future of Europe's energy-intensive industries, the associations explain in their statement. However, the EU's industrial base faces an existential crisis due to persistently high electricity prices and rising system costs. Significant increases in grid tariffs have already been recorded in several European countries, such as Germany, Ireland, Poland and others. The associations expect this upward trend to intensify across the entire continent as Europe accelerates its transition to a decarbonised economy. By 2050, this would require modernisation and expansion investments amounting to around €1.2tn.

An optimised and modernised European electricity grid is essential for the supply of clean electricity, but policymakers must ensure that rising costs due to grid expansion do not result in higher grid tariffs for energy-intensive industries, the associations demand. A harmonised EU framework for grid tariffs is essential, they say.

The associations are therefore calling on the EU to introduce a cap for energy-intensive industries that corresponds to the similar cap for power generators. In line with the provisions currently applicable to electricity generators, the associations propose that average grid tariffs in each member state should remain within a certain range, for example from €0 to €1.2 per MWh.

However, the associations consider it even more important that the €1.2tn in EU grid investments be placed on a secure financial footing. This would require a financing strategy that goes beyond tariff-based cost recovery and consists of amix of private financial instruments and EU funds. In this regard, the Clean Energy Investment Strategy and the Commission's proposal to increase the facility's budget fivefold are a step in the right direction, the associations state.

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Altago acquires honeycomb board specialist L'Hexagone

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French packaging group Altago has acquired L'Hexagone, a leading French manufacturer of honeycomb cardboard packaging solutions, as part of its external growth strategy. The transaction strengthens Altago's position in industrial packaging and creates what the company describes as the first multi-site honeycomb board production network in Western Europe.

Headquartered in La Guerche-de-Bretagne, France, near Rennes, L'Hexagone produces honeycomb cardboard packaging for industrial and logistics applications. The company employs 59 people, generates annual sales of €13.6m and exports around 29 per cent of its output. Its customer base includes industrial groups such as BSH, Danfoss, Ikea, Saint-Gobain and the French defence procurement agency DGA.

The acquisition also includes L'Hexagone 64, a production site near the Spanish border formerly operating as Corint Sud.

Altago said the deal reflects its expectation that demand for honeycomb cardboard packaging will continue to grow, supported by restrictions on plastic packaging, the replacement of synthetic cushioning materials and increasing demand for sustainable industrial packaging solutions.

Gilles Latil, managing director of L'Hexagone since 2016, will remain with the business. Mr Latil has overseen a major modernisation programme in recent years, including the construction of a new production facility in 2021.

Altago comprises 18 facilities active in cardboard and paper packaging, technical film extrusion and distribution. The company employs around 800 people and generated sales of €242m in 2025. It operates in France, Belgium and Spain.

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US issues preliminary determinations on dissolving pulp imports from Brazil and Norway

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Brazilian and Norwegian exports of high purity dissolving pulp to the United States could be subject to anti-dumping and, in the case of Brazil, countervailing duties. As part of its ongoing investigations into imports of this pulp grade from the two countries, the US Department of Commerce (DOC) has issued preliminary anti-dumping and countervailing duty determinations.

On 27 May, the DOC preliminarily determined that imports of high purity dissolving pulp from Brazil and Norway are being sold in the US at less than fair value and is therefore being dumped on the market. The period of investigation covered 1 July 2024 to 30 June 2025.

On 25 March 2026, the DOC had also preliminarily concluded that Brazilian producers exporting high purity dissolving pulp into the US are being provided subsidies that could justify countervailing duties. This part of the investigation covers the period from 1 January 2024 to 31 December 2024.

The preliminary dumping margin was set at 7.20 per cent for imports from Brazil and 6.54 per cent for imports from Norway. For Brazilian producers, the preliminary import duty – adjusted for subsidy offsets and collected as a cash deposit – would amount to 6.09 per cent.

The investigations were initiated in early September 2025 upon petition of US pulp producer Rayonier Advanced Materials and the United Steel Workers Union (USW). The deadline for a preliminary decision was postponed several times. The DOC must issue its final ruling no later than 135 days after the announcement of the preliminary determination. The final subsidy determination is planned to be issued on the same day as the final anti-dumping ruling. Final decisions in both cases can therefore be expected in October 2026.

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European paper mills consume less market pulp in April

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European paper mills used less market pulp in April 2026 than in the previous month. According to Utipulp, pulp consumption in the member countries amounted to approximately 816,000 t in April. This represents a decrease of about 5 per cent month-on-month. Compared with April 2025, however, market pulp consumption increased by around 3 per cent.

During the period from January to April, market pulp consumption at European mills totalled around 3.3 million t, remaining virtually unchanged from the same period last year.

Consumption of bleached hardwood kraft pulp declined more sharply in April, falling by 7 per cent to around 543,000 t month-on-month. By contrast, consumption of bleached softwood kraft pulp decreased only slightly, by 1 per cent, to approximately 221,000 t.

Pulp inventories at European paper mills remained largely unchanged over the same period. Stocks of market pulp stood at around 692,000 t at the end of April, according to Utipulp data. This corresponds to a decline of just under 0.5 per cent compared with March and around 1 per cent compared with April 2025.

Measured in days of production, total inventories remained unchanged at 26 days in April. Stocks of bleached hardwood kraft pulp were equivalent to 24 days of production, unchanged from March. Inventories of bleached softwood kraft pulp declined from 32 to 30 days of production.

Inventories and consumption of pulp consumers in Europe
March 2026

tonnes		UNBLEACHED	BLEACHED / SEMI-BLEACHED					
		Sulphite & Kraft	Softwood sulphite	Hardwood sulphite	Softwood kraft	Hardwood kraft	Total	Previous year
Inventories								
February	2026	7,681	28,291	10,780	229,759	432,840	709,351	746,511
March	2026	8,132	26,473	8,514	233,233	420,760	697,112	704,711
Consumption								
February	2026	8,265	30,719	16,204	216,888	547,742	819,818	793,552
March	2026	8,454	30,884	17,008	227,158	578,879	862,383	882,666

NB: Total and previous year total do not include DIP and CTMP, figures are constantly revised.
Each national Association has to provide an estimation for 100% of the national volumes out of their samples (from 80% to 100% depending on the countries).

Source: UTIPULP

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EUWID PULP AND PAPER www.euwid-paper.com | Retrieved 11 June 2026

European containerboard industry banks on exports and trade agreements

Fefco conference: Exports to bring European market back into balance

EUWID + 10 June 2026 | ~ 6 min | Published in issue 24/2026

Rising energy costs, weaker growth prospects and increasing trade barriers are putting pressure on the European corrugated packaging industry. Industry representatives see exports and further consolidation as key responses to the current challenges.

Overcapacity, rising energy costs and growing trade barriers are expected to continue shaping the European corrugated packaging industry in the years ahead. At the Fefco conference held in Madrid at the end of May, industry representatives therefore advocated a stronger export focus, the development of new markets and further consolidation.

Both keynote speaker Javier Gimenez, Professor at IESE Business School, and Alejandro Mata, Senior Economist, European Forest Products at Fastmarkets RISI, addressed the immediate impact of the Iran war on the industry, namely weaker growth prospects in Europe and higher energy costs. Both factors are weighing on demand from consumer goods markets as well as from industry and manufacturing. Gimenez warned that the 2020s would be a decade of rapid transformation and that a return to the previous status quo should not be expected.

Weak demand and high energy costs weigh on packaging sector

According to Mr Mata, part of the surge in consumer goods demand seen during the Covid pandemic is currently being reversed. Demand for goods has meanwhile fallen below 2020 levels, while the services sector has expanded disproportionately. However, growth in services is unable to compensate for the decline in demand stemming from lower consumption of goods.

Higher inflation is also prompting consumers to switch to lower-priced products, which are often packaged in plastic films. This, too, is having a negative impact on demand for paper- and board-based packaging.

Although e-commerce is recovering, a growing share of online purchases is taking place on Asian platforms. As a result, part of the demand for packaging is also shifting to Asia. However, Mr Mata expects the EU's recent tightening of import rules for low-value consignments to at least partially curb this trend.

In the current market environment, which continues to be characterised by uncertainty, Mr Mata also sees a continuation of what he described as "inventory super cycles". These are characterised by companies typically building up containerboard inventories during the first half of the year and reducing them again in the second half.

Alongside rising labour costs, energy costs remain one of the industry's biggest challenges, according to Mr Mata. Although energy prices remain well below the peaks seen following the outbreak of the war in Ukraine in 2022, the higher price level now reached is likely to persist for a longer period.

Overcapacity continues to weigh on operating rates

Additional pressure stems from comparatively low operating rates at European recycled containerboard mills. According to Mr Mata, utilisation currently stands at around 85 per cent, compared with approximately 95 per cent in North America. Such a level would also be necessary in Europe to ensure sustainable profitability. In South America and Asia, however, producers are able to operate profitably despite lower utilisation rates of below 80 per cent and below 70 per cent, respectively. Mr Mata expects operating rates to return to pre-pandemic levels this year, when global utilisation rates were in some cases well above 85 per cent.

The main challenge facing the recycled containerboard sector remains global overcapacity, estimated at around 24 million t. Of total global capacity of approximately 204 million t, 69 per cent is now located in Asia and 18 per cent in Europe, which nevertheless remains the world's second-largest producer of recovered-paper-based containerboard.

Against this backdrop, Mr Mata expects further consolidation in the still highly fragmented European market. While the five largest producers currently account for around 35 per cent of the European market, their counterparts in North America hold a combined market share of 73 per cent.

Protectionism threatens export-driven strategy

Nevertheless, Paul van Bezouw, Managing Director of Containerboard Europe, expects supply and demand in the European containerboard market gradually to move back into balance. Exports are expected to be the main driver of this development.

Europe has significantly strengthened its position as a net exporter of containerboard over the past decade. The net export surplus increased from around 400,000 t in 2016 to almost 2.7 million t in 2025. Latin America, Africa, Asia and Turkey were among the most important export destinations.

This development was made possible largely by free global trade. However, the industry is now witnessing a reversal of this trend.

In addition to the tariff measures introduced by the US administration, which is increasingly using tariffs as an instrument of economic and geopolitical influence, protectionist measures are also becoming more prominent in Turkey, Mr van Bezouw said. "The sector needs to defend itself and show its teeth," he stressed.

Despite this, Mr van Bezouw remains confident that new export opportunities and bilateral trade agreements concluded by the EU will ensure that demand growth once again outpaces capacity growth from 2027 onwards, helping to bring the European market back into balance.

Bilateral trade agreements gaining importance

This view was echoed by Bernard Lombard, Trade & Industrial Policy Director at Cepi. According to Mr Lombard, international trade in paper and board has changed fundamentally over the past two decades. What was once predominantly a transatlantic trade relationship between Europe and North America, with South America playing a smaller role, has evolved into a global trading system linking Europe, Asia, North America and South America.

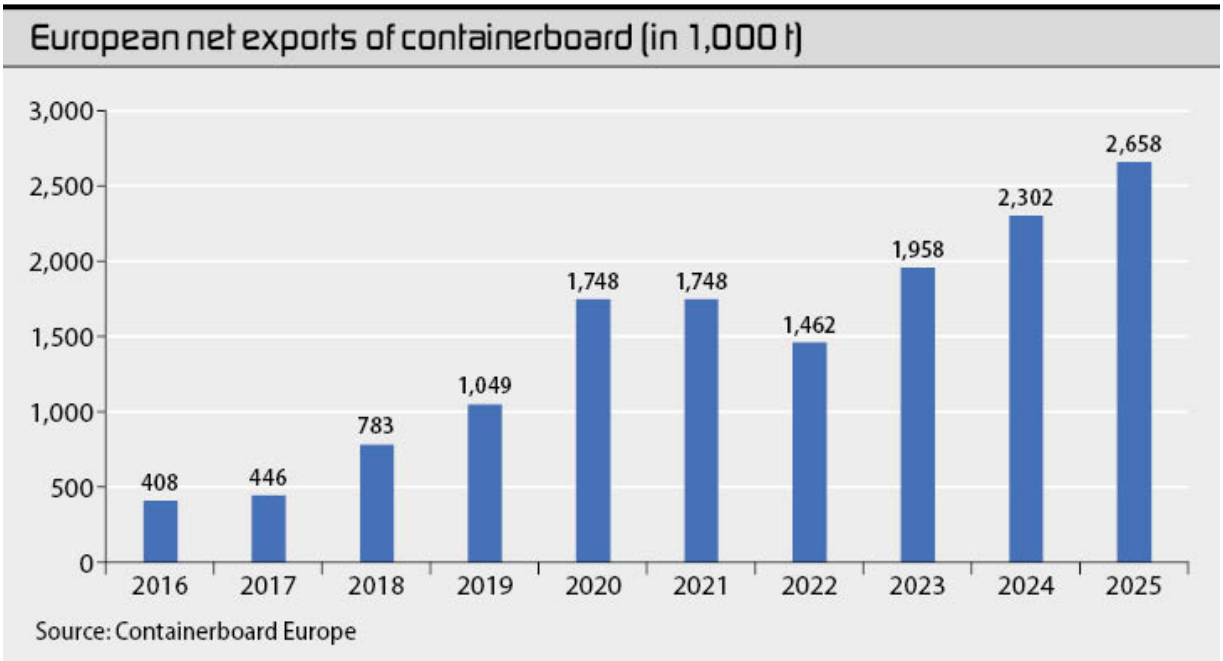
However, this trend is now being reversed. Instead of free movement of goods, global trade is increasingly characterised by protectionism. The European paper and board industry is already feeling the effects. EU paper and board exports fell by 1.3 per cent in 2025, while imports increased by 1.2 per cent over the same period. “The trade surplus has shrunk, but the balance remains positive,” Mr Lombard said.

China in particular has expanded its paper and board capacities massively since 2020, making it more difficult for European producers to develop additional export opportunities. At the same time, the US market has become less accessible as a result of recent tariff policies. Although the EU has not introduced effective countermeasures, both sides are losing from the reduced market access. European exports of paper and pulp to the USA declined by more than 4 per cent year on year in 2025. At the same time, paper and board shipments from the USA to Europe fell by almost 8 per cent.

Turkey has also built substantial new capacities in recent years while simultaneously introducing various trade barriers. As Mr van Bezouw had already pointed out, the country has shifted from being a net importer to becoming a net exporter, largely as a result of a range of protectionist measures introduced since 2024. These measures affect not only testliner but also cartonboard, LWC and brown kraftliner and sack kraft paper.

Mr Lombard emphasised that this is not a new issue. For the past 25 years, Cepi has been advocating free access to raw material and end-product markets outside the EU as well as fair trading conditions.

Nevertheless, Mr Lombard believes that multilateral trade is currently at an impasse. The greatest growth opportunities are now offered by bilateral trade agreements. As examples, he cited the EU’s agreements with the Mercosur countries as well as the recently concluded agreements with India and Indonesia.



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EUWID PULP AND PAPER www.euwid-paper.com | Retrieved 11 June 2026

More than 130 companies call for later start date and greater clarity on PPWR

Definition of secondary packaging to facilitate handling

EUWID + 10 June 2026 | ~ 3 min | Published in issue 24/2026

A group of brand owners and packaging companies has urged the European Commission, Parliament and Council to postpone the application of key provisions of the EU Packaging and Packaging Waste Regulation (PPWR) and to clarify several aspects. In a joint letter, they argue that there is still "significant legal uncertainty" and that the time remaining until PPWR starts to apply on 12 August leaves too little time for companies to prepare.

As expected, environmental groups have sharply criticised the move. The umbrella organisation Rethink Plastic and its member, Zero Waste Europe (ZWE), warn that any postponement would undermine both legal certainty and the regulation's environmental goals. Greenpeace USA described the letter as a "polluter's wish list."

Calls for the European Commission to postpone the application of the PPWR had already been made last year. In summer 2025, 17 industry and business associations urged Germany's Environment Minister Carsten Schneider to support a postponement. A few months later, EU Environment Commissioner Jessika Roswall indicated a willingness to find a "pragmatic solution within the PPWR's legal framework," but ruled out pushing back the application date.

The 138 signatories to the letter addressed to EU lawmakers are primarily companies from the food and beverage sector, including packaging-related businesses, among them Coca-Cola, Mondelez, McDonald's and Kraft Heinz. In the letter, they warn that unresolved technical and legal issues might jeopardise compliance efforts and derail investment decisions.

One of their key concerns is the limit values for PFAS in food packaging set out in Article 5 of the PPWR, which will apply from 12 August. If "full legal certainty and uniform application" of these requirements cannot be guaranteed, they argue the date should be pushed back. This, they say, would allow outstanding technical, legal and methodological questions to be resolved before the regulation enters general application.

From the signatories' perspective, clarification is also needed on the test methods for analysing PFAS content, as well as on a wide range of other elements of the PPWR. These include the criteria for packaging recyclability and the rules on "design for recycling". They are calling for "pragmatic and proportionate implementation, including appropriate transitional measures or targeted exemptions" for packaging used for food supplements, arguing that such packs require strong barrier properties and are therefore not currently recyclable on an industrial scale.

The companies also see a need for clarification on the targets for recycled content in certain plastic packaging, the use of reusable packaging, refill obligations and the planned harmonised labelling system. Among other things, they call for a clearer regulatory status for "advanced recycling technologies" for plastics, i. e. chemical recycling processes, in order to increase the availability of recycled plastics suitable for food contact applications.

Zero Waste Europe opposes calls to postpone application of PPWR

Environmental NGO Zero Waste Europe (ZWE) has strongly criticised calls from businesses in the packaging value chain to delay the implementation of the EU's Packaging and Packaging Waste Regulation (PPWR), warning that such moves would undermine both legal certainty and environmental objectives.

ZWE described the initiative as "a last-minute attempt to weaken and re-negotiate agreed measures" and rejected any postponement of the Regulation's application. While acknowledging the challenges the packaging sector faces in adapting to the new regulatory framework, the NGO suggested that businesses should be focused on implementation and compliance rather than pushing for delays.

"Postponing it would violate the principle of legal certainty and the integrity of the EU's legislative framework," the group said, adding that the application date is a binding element of the Regulation and "not a mere suggestion".

The organisation also dismissed claims that insufficient guidance has been provided, pointing to Commission guidance and frequently asked questions documents published in March. According to Zero Waste Europe, the issue is not a lack of clarity but rather a reluctance within parts of the industry to comply with the agreed rules.

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Kraftliner prices in Germany under negotiation

Implementation date postponed to mid-June

EUWID + 10 June 2026 | ~ 2 min | Published in issue 24/2026

Following announcements by kraftliner manufacturers of further price increases from June onwards, there was still no clear picture in the first week of the month on the German market as to whether these will be successfully implemented. Paper manufacturers appear determined to implement further hikes in the market, citing high capacity utilisation of paper machines and limited availability.

Negotiations between the paper and corrugated board industries about the planned price increase in June are still ongoing in Germany. In May, suppliers had put forward price hike demands of mostly €80/t for both brown and white-top kraftliner. According to EUWID information, similar announcements are also expected for semi-chemical fluting.

While some paper mills initially pointed to 1 June as the implementation date for price increases in their announcements, negotiations are now centring on the middle of the month. An increase right at the start of the month is off the table, according to respondents within the paper and corrugated board industry. Consequently, market players cite 15 June as the earliest implementation date currently under negotiation. At the same time, there are also voices within the corrugated board industry calling for the increase to be postponed until July. Corrugated board manufacturers are still endeavouring to pass on the previously implemented price rises for brown and white-top kraftliner as well as for semi-chemical fluting.

Suppliers surveyed told EUWID they were determined to implement a significant portion of the announced price increase. Paper mills are primarily citing good utilisation of paper machines and dwindling availability due to maintenance shutdowns as well as the loss of kraftliner volumes from the US.

In discussions with EUWID, buyers sometimes described the availability of kraftliner as challenging. “You really have to make sure you get your volumes,” sums up an insider from the corrugated board industry. Anything exceeding budgeted volumes is currently hard to obtain, according to market sources.

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Rottneros to suspend CTMP production for four weeks

EUWID + 10 June 2026 | ~ 1 min | Published in issue 24/2026

Rottneros will suspend production at its chemi-thermomechanical pulp (CTMP) mill, Rottneros Bruk in Sunne, Sweden, for four weeks between 6 July and 2 August.

In response to an enquiry from EUWID, Chief Executive Officer Per Bjurbom explained that the mill currently operates on a five-shift system. The production stoppage is part of this model, which was agreed with the trade unions, and helps reduce operating costs at the site, he said.

Bjurbom stressed that the four-week shutdown is unrelated to the current weakness in the CTMP market and is solely linked to summer holiday arrangements and the shift system at the Rottneros mill. No regular maintenance shutdown is planned at the site this year.

The Rottneros mill produces chemi-thermomechanical pulp (CTMP). The site's production capacity was expanded in 2024 and now stands at 165,000 tpy. The temporary shutdown will not affect the mill's capacity, and customer deliveries will not be disrupted, the company said.

Weak demand continues to weigh on CTMP business

In its first quarter 2026 report, Rottneros already pointed to declining overall demand for CTMP, persistently weak market conditions and low margins. The company's management also stated that production at Rottneros Bruk continues to be constrained by measures taken in response to the weak market environment.

CTMP production at Rottneros totalled 27,600 t in the first quarter this year, broadly in line with the year-earlier period. However, the company emphasised that production would continue to be adjusted in line with market conditions.

According to CEO Per Bjurbom, the planned production stoppage has already been incorporated into the mill's annual operating plan.

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Brigl & Bergmeister to expand capacity

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Austrian label papers producer Brigl & Bergmeister (B&B) is planning a substantial expansion of its production capacity for wet-strength label papers. The company announced that production will be established at an additional site in Germany, with further details due to be released at the end of June. Currently, the company operates paper mills in Niklasdorf, Austria, and Vevče, Slovenia.

Brigl & Bergmeister also plans to expand embossing capacity for label papers at its Niklasdorf mill in Austria by 15,000 tpy. According to the company, implementation is expected in the near term.

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Palm starts trial operations at Alzenau corrugated board plant

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The Palm group has started trial operations at its new corrugated board plant in Alzenau, Germany at the end of May. The company the commissioning of the machinery and processes is proceeding on schedule. Parallel to the trial operations, it has already begun gradually transferring customer orders to the new site, Palm said in early June. Construction work at the Alzenau site near Frankfurt started in September 2024, with the start-up scheduled for the second quarter of this year.

At the new plant, Palm has consolidated the production capacities of its two existing plants in Alzenau and Hasselroth-Gondsroth. The company invested a total of around €200m in the site. A new corrugator and a fully automated high-bay warehouse were installed, among other things.

The Palm group operates 38 production sites in Europe, producing newsprint, recycled corrugated case material as well as corrugated board and packaging.

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Andritz to upgrade cooking plant at Metsä Fibre’s Kemi mill

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Andritz received an order to modernise the cooking plant at **Metsä Fibre**’s Kemi mill in Finland. The project is scheduled for completion in the fourth quarter of 2026. Following the modernisation, the facility will be able to process both softwood and hardwood raw materials. The delivery also comprises a chip feeding system and a steam reboiler designed to improve heat recovery from the digester and reduce odorous emissions. Once the project has been completed, the cooking plant will support annual production of up to 1.5 million t of softwood and hardwood pulp at the Kemi site.

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Green light for Dunapack's takeover of Stora Enso plants

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On 2 June 2026, the German cartel office has given green light to **Dunapack Packaging**'s proposed acquisition of **Stora Enso**'s German corrugated packaging plants. The transaction comprises Gaster Wellpappe, Wellpappe Sausenheim and PTI, with around 350 employees and sales of €74m. Dunapack Packaging expects the acquisition to be completed in 2026.

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Fefco: PPWR presents opportunities and challenges for the European corrugated board industry

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With less than three months remaining before keyprovisions of the new EU Packaging and Packaging Waste Regulation (PPWR) enter into force, numerous questions remain unanswered. As a result, requirements relating to declarations of conformity, PFAS compliance and technical documentation were among the key topics discussed at the Fefco Conference in Madrid at the end of May.

The PPWR requirements represent a fundamental shift and go far beyond simply ticking off a list of compliance requirements, explained Eleni Despotou, Director General of Fefco. “The regulation marks a turning point, but it also helps companies differentiate themselves in the marketplace,” she said. Companies that engage with the new requirements early and develop appropriate solutions can actively shape the transition and gain competitive advantages through innovations such as recyclable or PFAS-free barrier solutions.

According to Ms Despotou, Fefco closely followed the development of the regulation throughout the legislative process and contributed to numerous technical discussions. The association is now focusing on the development of technical guidelines, factsheets and position papers.

DoC requirements drawing closer

The most important deadline is fast approaching. From 12 August 2026, every packaging item placed on the EU market must be accompanied by a Declaration of Conformity (DoC), through which manufacturers demonstrate compliance with the PPWR requirements.

By that date, companies must also be able to provide evidence relating to PFAS and other substances of concern (SoC). However, not all technical prerequisites had been clarified by the time of the conference at the end of May 2026. According to Ms Despotou, clarification from the European Commission regarding PFAS testing methods is expected in June.

Fefco provides implementation tools

To support companies with implementation, Fefco has already developed templates for the Declaration of Conformity, technical documentation and PFAS-related declarations, according to the association. A template for the heavy metals declaration of conformity is currently being prepared, Ms Despotou added.

In addition, the association has developed a roadmap intended to help companies meet their future obligations. The aim is not only to ensure regulatory compliance but also to enable companies to take advantage of the market opportunities arising from the new legislation.

PFAS and substances of concern seen as the biggest risk

Felipe Vieira de Castro, Head of Recycling Intelligence at Circpack by Veolia, sees the main challenges associated with PPWR implementation not in the packaging itself, but rather in the outstanding technical requirements and the extensive documentation and compliance obligations.

According to Mr Vieira de Castro, the greatest risks for corrugated board manufacturers relate to substances of concern, including heavy metals, microplastics, bisphenols, mineral oils and PFAS. Companies will also need to provide documentation relating to PFAS and substances of concern from 12 August 2026 onwards. From that date, a PFAS limit value of 50 ppm, or 50 mg/kg, will apply.

The technical details of the testing methods are particularly important for the corrugated board industry, Mr Vieira de Castro noted, especially as these details were not yet available at the time of the conference. PFAS are not intentionally used in corrugated board packaging but may enter packaging materials unintentionally through the supply chain.

In addition to this uncertainty, Mr Vieira de Castro warned that individual member states could introduce national requirements or testing procedures before the publication of the harmonised EU testing method. This could lead to differing requirements across the EU.

Mr Vieira de Castro also identified future labelling requirements as a potential area of high risk, although corrugated board packaging is likely to be affected only indirectly. Numerous details concerning pictograms, digital identification systems and the format of future labelling requirements remain unresolved. Among the open questions is whether every individual packaging item will need to carry a unique identifier.

Corrugated board already exceeds PPWR recycling target

At the same time, the corrugated board industry believes that the PPWR confirms its position as a circular material. During the conference, Fefco and Circpack by Veolia presented a joint study showing that the recycling rate for corrugated board in Europe already exceeds ninety per cent. This is significantly above the PPWR target of 85 per cent for paper and board packaging by 2030.

Corrugated board benefits from well-established collection systems, comparatively high collection quality and extensive recycling capacities across Europe.

In addition, the industry has reduced the average basis weight of corrugated board from around 575 g/m² to approximately 500 g/m² over the past twenty years.

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Ahlstrom to replace part of natural gas consumption with biomethane in Italy

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Speciality materials producer **Ahlstrom** has entered into long-term biomethane supply agreements with two energy producers at its Italian manufacturing sites. The agreements cover biomethane from seven production plants and are expected to reduce carbon emissions from Ahlstrom's Italian operations by approximately 65,000 tpy of CO_2 equivalent, with the potential to lower emissions by around 44 per cent through the replacement of part of Ahlstrom's natural gas consumption. Ahlstrom operates several manufacturing sites in Italy, including filtration media plants in Turin/Mathi and Fabriano as well as specialty materials facilities in Capannori and Frosinone.

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Sappi to modernise pulp mill in Saiccor

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Sappi has placed an order with **Valmet** for the replacement of recovery boiler components at its Saiccor pulp mill in South Africa. The upgrade is intended to improve operational safety, reduce the risk of unplanned downtime and improve overall reliability of the mill. According to Valmet, the delivery and installation work will take place during a maintenance downtime in February 2027. The Saiccor mill, located south of Durban, has a capacity of 890,000 tpy of dissolving pulp, which is mainly used to produce viscose fibres for the textile industry.

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IP completes takeover of Norpac

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International Paper (IP) has finalised the acquisition of North Pacific Paper Company (**Norpac**) for $360m. Norpac operates one mill in Longview, Washington. The site produces up to 900,000 tpy of recycled corrugated case material, bag paper, specialty kraft papers as well as printing and writing paper grades on three machines and employs around 500 people. The takeover follows the announcement by entities in North America and EMEA.

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Jass signs new energy supply contract for Rudolstadt/Schwarza mill

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German recycled containerboard mill **Papierfabrik Jass Schwarza**, has secured long-term supply of energy and utilities through a new supply contract with **TWS Thüringer Energie Service**. TWS has been the main supplier of energy and various production utilities to the Jass Schwarza paper mill in Rudolstadt near Erfurt, since 2004. According to a statement, TWS will supply energy for the drying process and other production media. At the Schwarza mill, Jass operates a recycled containerboard machine with a capacity of 500,000 tpy.

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New EVP at UPM Energy

EUWID + 10 June 2026 | ~ 1 min | Published in issue 24/2026

Joonas Rauramo has been appointed Executive Vice President, **UPM Energy**. He will be a member of UPM's Group Executive Team and report to Massimo Reynaudo, President and CEO. He will assume his role on 1 October 2026 and will be based in Helsinki, Finland. Previously, he served in leading roles of Coolbrook Oy and Fortum, among others.

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EUWID PULP AND PAPER www.euwid-paper.com | Retrieved 11 June 2026

Sylvamo posts Q1 loss in European business

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Difficult market conditions and increased cost pressures pushed Sylvamo's results into the red in the first quarter of the year. The fine paper manufacturer, which operates in Europe through its two plants in Saillat, France, and Nymölla, Sweden, suffered a total net loss of $3m in the first three months of its financial year, compared with a net profit of $27m in the same period last year. The adjusted operating result is also negative, with adjusted Ebitda amounting to $29m (Q1 2025: $90m). Losses were incurred primarily in the European business.

The company reports that the supply and demand situation in Europe remained difficult. Market prices were significantly lower than a year ago, but, as Sylvamo explains, price increases were implemented in April. The company states that it announced a second increase from May onwards and expects this to be implemented in the second and third quarters this year.

In Latin America, the transition from the seasonally strongest demand in the fourth quarter to the weakest season in the first quarter has been completed, according to Sylvamo; however, improved demand is expected in every quarter of this year.

In North America, the supply agreement with International Paper for the purchase of fine paper produced at IP's Riverdale mill has expired at the end of May 2026. The Riverdale mill is being converted to produce packaging paper, and the cessation of fine paper production has reduced supply in North America by 7 per cent, according to Sylvamo. Against the backdrop of tight supply, price increases have been implemented in North America, with further increases to follow, Sylvamo said.

To compensate for the lost capacity at Riverdale, Sylvamo is building additional capacity at its Eastover mill in South Carolina, which is due to be completed in the fourth quarter of this year. During this transitional phase, Sylvamo has begun importing paper from its European mills to North America or sourcing products from third-party suppliers to meet demand of its customers in North America.

However, the changed US tariff rates introduced in February also came into play for Sylvamo in the first quarter, prompting the company to import products from its operations in Brazil and to scale back imports from European plants.

In addition to the increased financial burden of investments in the Eastover plant, Sylvamo is currently facing rising costs for energy, chemicals, diesel and sea freight due to the conflict in the Middle East, and expects this pressure to continue.

Sylvamo results

million $	January - March 2026	2025
Key figures		
Sales	755	821
Adjusted EBITDA	29	90
Adjusted operating result	-21	28
Net result	-3	27

Business area review		
Europe		
Sales	190	190
Adjusted EBITDA	-36	-15
Latin America		
Sales	187	199
Adjusted EBITDA	26	46
North America		
Sales	390	438
Adjusted EBITDA	39	59

Source: Sylvamo

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EU supports decarbonisation projects

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The European Commission is awarding €400m in funding to 65 projects to accelerate the deployment of innovative heating technologies in European industry. Among the beneficiary companies are several companies from the paper and pulp sector, with a focus on France.

According to the Commission, the selected projects will avoid more than 6.6 million equivalent tonnes of CO2 emissions over the next ten years by replacing natural gas-fired heat generation systems with innovative technologies. The supported companies will generate around 1.3 TWh of decarbonised heat in the first five years of operation. This equates to the replacement of over 1.5 billion m³ of natural gas over a five-year period, which is roughly equivalent to the annual consumption of 4 million households in the EU.

The projects will receive a total of around €400m from the Innovation Fund, with the funds coming from the EU Emissions Trading System (EU ETS). The drafting of the grant agreements with the selected projects is set to begin, and they are expected to be signed in the second half of 2026.

In addition to the paper and pulp industry, the projects cover the industrial sectors of glass, ceramics and building materials, as well as iron and steel, which have so far been less represented in the Innovation Fund's portfolio. From the paper industry, Wepa France, Ahlstrom, Hartmann Packaging, Saica, Munksjö, Norpaper, Smurfit Westrock, Hamburger, Mandeure, Kimberly-Clark and other manufacturers are among those named whose energy projects have been selected by the European Commission.

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UK industry veteran Craig Robinson to head up The Recycling Association

EUWID + 09 June 2026 | Ann Kühlers | ~ 1 min | Published in issue 24/2026



Craig Robinson has been named to succeed Paul Sanderson as CEO of The Recycling Association.

The Recycling Association (TRA) has appointed Craig Robinson as its next chief executive officer. He joined the UK trade body representing the recovered paper and recycling industry on 1 June ahead of formally taking over the role on 17 August. He will work alongside out-going chief executive Paul Sanderson during a transition period.

Mr Robinson brings almost 25 years of experience in the recycling industry, having held roles in the recovered paper, cardboard and glass markets. Most recently, he worked for Visy, Sibelco and Cyclelink. He has also previously served on The Recycling Association's governing council.

Association president Colin Clarke said Mr Robinson's experience running member companies would enable him to understand the challenges facing the sector from the outset. "At a time of huge change, we needed someone who can take over from Paul and hit the ground running," Mr Clarke added.

Mr Sanderson, who served at the helm of the TRA for three years, announced in April that he would be leaving the association to pursue an opportunity with the UK Cleaning Products Industry Association.

Mr Robinson said he looked forward to representing member companies and said the association would continue to support them under his leadership as the sector navigates major regulatory and market developments in the months and years ahead.

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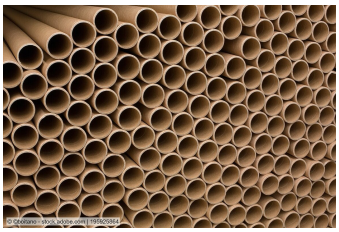
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Coreboard producer Cenpa is being liquidated

EUWID + 08 June 2026 | Valeria Buß | ~ 1 min | Published in issue 24/2026

French coreboard producer Cenpa has been unable to overcome its financial difficulties and is now being liquidated. The company's Managing Director Dimitri Mager told EUWID that the commercial court of Strasbourg had placed Cenpa into liquidation on 1 June 2026.



Cenpa has been in financial difficulties for some time and will now shut down.

However, the company requested that production be continued for a further two weeks in order to complete final customer deliveries. The last day of production will therefore be 14 June 2026.

Mr Mager explained that only the smaller of the site's two machines had recently been in operation. This machine has a capacity of around 20,000 tpy and produces coreboard for tissue cores – a segment in which the company had hoped to achieve more stable business. The site's second machine, which can produce up to 50,000 tpy of coreboard with higher ply-bond strength for industrial cores, has been standing still since mid-2025, Mr Mager says.

Cenpa is part of German investment company Acursia Capital and operates one plant in Schweighouse-sur-Moder in eastern France. The company had been in receivership since 2 December 2024. The observation period had been extended several times, Mr Mager said, explaining that sufficient funds had still been available to continue operations. However, a buyer was needed to secure the future of the site. As the search for an investor proved unsuccessful, the mill would now close permanently, he concluded.

The closure affects 56 employees, who will continue working at the mill until mid-June.

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VPK Group takes full ownership of Fencor Packaging Group

08 June 2026 | ~ 1 min | Published in issue 24/2026

Belgian VPK Group has announced that it has taken full ownership of UK-based Fencor Packaging Group.



The VPK Group has added another corrugated packaging plant to its UK manufacturing base

Following the purchase of a 28 per cent minority stake in 2024, VPK now holds 100 per cent of the shares in the company, which includes corrugated packaging producer Manor Packaging.

Manor Packaging is a producer of bespoke corrugated packaging with a particular focus on e-commerce packaging. It runs a production site in Whittlesey, Cambridgeshire. The plant is supported by storage and warehousing operations enabling nationwide customer supply. The company maintains a close trading relationship with UK sheet feeder Corrboard UK, which is also majority-owned by VPK.

Manor Packaging will continue to operate as a stand-alone business within the VPK Group, the group announced. However, the acquisition will lead to a change in management. David Orr, Fencor's Group Managing Director, will retire after 26 years at the helm of the company. Tony Clifton, previously Sales Director, will take over as Managing Director of Manor Packaging.

In the UK, VPK operates three corrugated packaging plants through its subsidiary VPK Packaging, three core production facilities through Corex, as well as its UK headquarters in Desborough.

The group is active in 21 countries across several segments, producing recycled corrugated case material, corrugated packaging, solid board packaging and cores. VPK has a total capacity of 2.3 billion m² of corrugated board per year.

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US proposes new tariffs over forced labour concerns

05 June 2026 | Frauke Schmidt | ~ 1 min | Published in issue 24/2026

The United States has proposed new tariffs of ten and 12.5 per cent on imports from 60 economies, arguing that the countries concerned have failed to adequately prevent imports of goods produced with forced labour. The proposed measures were announced by the Office of the US Trade Representative (USTR) following a Section 301 investigation.



According to the USTR, imports from the European Union, the United Kingdom, Canada and several other economies would be subject to an additional ten per cent duty, while imports from countries including China, India and Japan would face tariffs of 12.5 per cent. The proposal is subject to a public consultation process, with hearings scheduled for early July.

The move is widely seen as an attempt by the Trump administration to rebuild parts of its tariff regime after the US Supreme Court struck down earlier tariffs imposed under emergency powers legislation in February 2026. The court ruled that the International Emergency Economic Powers Act (IEEPA) does not authorise the president to impose tariffs, forcing the administration to seek alternative legal grounds for new trade measures.

The proposal has already drawn criticism from several trading partners, including the EU, which argues that it has adopted some of the world's strictest legislation to combat forced labour in supply chains.

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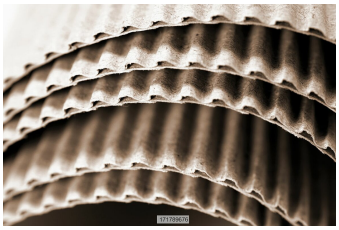
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Dominique Lagarde is the new president of Carton Ondulé de France

05 June 2026 | Valeria Buß | ~ 1 min | Published in issue 24/2026

Dominique Lagarde has been appointed new president of French corrugated board association Carton Ondulé de France. He succeeds Philippe Durand.



According to the association, Mr Lagarde has more than 35 years of experience in the corrugated board industry. Most recently, he was in charge of Smurfit Westrock's industrial operations in France.

Carton Ondulé de France represents five companies active in France, accounting for nearly 70 per cent of the country's corrugated board plants.

In total, 47 plants in France produce around 2.7 million t of corrugated board annually.

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Smurfit Westrock announces €600m investment programme in France

03 June 2026 | Valeria Buß | ~ 1 min | Published in issue 24/2026

Smurfit Westrock plans to invest approximately €600m in its French operations over the next three to five years, the paper and packaging group announced ahead of the Choose France investment summit on 1 June.



Choose France is an initiative aimed at attracting foreign investment to France

Choose France is an initiative launched by President Emmanuel Macron aimed at attracting more foreign investment to France.

As part of the investment programme, around €40m is earmarked for the modernisation and expansion of Smurfit Westrock's bag-in-box site in Épernay. Another €20m are to be invested in the further development of the corrugated packaging plant in Vernon.

In addition, the company plans investments of more than €100m for various projects at its Cellulose du Pin kraftliner mill in Facture, including the installation of a new evaporation plant.

With the investment programme, Smurfit Westrock wants to support the modernisation and decarbonisation of its French operations. In addition to improving production efficiency, the measures are also intended to expand and enhance packaging capabilities.

The company stressed that France was a strategically important market for the group. Over the past five years, it had already invested more than €500m in its French operations.

Smurfit Westrock operates around 50 sites and employs approximately 6,000 people in France

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Management submits takeover offer for pulp producer Fibre Excellence

EUWID + 03 June 2026 | Valeria Buß | ~ 2 min | Published in issue 24/2026

The management of insolvent pulp producer Fibre Excellence in France plans to take over the company in order to secure its future. Fibre Excellence announced that the management had submitted a takeover offer for the two pulp mills Saint-Gaudens and Provence to the commercial court of Toulouse on 1 June.



The Saint-Gaudens mill is one of the two pulp mills that Fibre Excellence's management wants to take over. Production at the two sites is currently idle.

Fibre Excellence is currently wholly owned by Indonesian entrepreneur Jackson Wijaya, who also holds 100 per cent of the shares in North American pulp and paper producer Domtar.

According to Fibre Excellence, the management's plan envisages the creation of a new company that would take over all assets and employees. Financing is to be secured through a shareholders' agreement involving private and public investors, including the French regions of Occitanie and Provence-Alpes-Côte d'Azur. Additional financing commitments are still under negotiation.

Transaction still subject to conditions

In order for the bid to proceed, agreements with the French state must be reached by 17 June at the latest. Fibre Excellence has set out three conditions that it considers essential to restoring the group's competitiveness. These include an adjustment of the feed-in tariff for biomass energy to reflect actual electricity production costs, securing 25 per cent of its wood supply from public French forests through closer cooperation with the state forestry agency ONF, and the reintegration of the Saint-Gaudens pulp mill into the European CO_2 emissions trading system.

Additional financing commitments from private investors must be secured by 10 July 2026.

Fibre Excellence has been in receivership since 27 April. The insolvency filing came after several months of discussions between the company and the French state over possible support measures. Fibre Excellence had mainly called for an adjustment of the state-regulated feed-in tariffs for biomass energy generated at its sites, arguing that the mechanism needed to reflect rising wood costs. The French state, for its part, had made several proposals. Ultimately, however, the company ran out of time – and money – and no final agreement was reached. Insolvency proceedings were subsequently opened for the two Fibre Excellence mills and a search for buyers was initiated. Production at the two pulp mills is currently down.

By the end of May, no potential investors had emerged. "Having received no external offers to date, the management of Fibre Excellence has decided to take action," the company said in a statement on 1 June. Fibre Excellence expressed confidence in the future of combined pulp and power production in France. "The management team and I are supporting this takeover bid because we firmly believe in the future of our sites," said Fibre Excellence CEO Jean-François Guillot

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