EUWID PULP AND PAPER www.euwid-paper.com | Retrieved 26 June 2026

Sonoco to increase prices in North America

EUWID + 24 June 2026 | ~ 1 min | Published in issue 26/2026

Sonoco has announced price increases in North America. The company said it would hike prices for all grades of uncoated recycled paperboard (URB), which is used for the production of cores, amongst others, by $60/t, effective with shipments from 8 July. Sonoco said the increase is driven by robust demand across its markets, high capacity utilisation within its mill network, and continued inflationary cost pressures. In addition, prices for converted paperboard products are also set rise by 7 per cent as of the same date. The announced increase covers products including tubes, cores, cones, partitions and protective packaging.

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EUWID PULP AND PAPER www.euwid-paper.com | Retrieved 26 June 2026

Schades makes strategic investment in Germany

EUWID + 24 June 2026 | ~ 1 min | Published in issue 26/2026

Schades Group has expanded its printing and converting capacities at R+S Group in Sarstedt, Germany. Schades says one of the machines offers high productivity and maximum flexibility, featuring high operating speeds and an integrated four-colour inline printing function. The second machine, a two-colour unit, provides flexible converting capabilities, including coreless production, rapid processing of large-diameter rolls and the handling of linerless labels.

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Tero Kokko new President and CEO of Voith Paper

EUWID + 24 June 2026 | ~ 1 min | Published in issue 26/2026

Effective 1 October 2026, **Tero Kokko** will succeed **Andreas Endters** as President and CEO of **Voith Paper**. After more than 35 years with the company, Mr Endters is leaving Voith at his own request at the end of September. Mr Kokko is currently responsible for the global pulp industry business unit at Finnish technology group Valmet and possesses more than 20 years of international leadership experience in strategy, transformation and business development.

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Koehler Paper announces price increase for thermal papers

EUWID + 24 June 2026 | ~ 1 min | Published in issue 26/2026

Koehler Paper announces that it will raise its prices for thermal papers. An 8 per cent surcharge will apply to new orders from 1 July 2026 in selected markets. The increase particularly will apply to highly competitive markets whose price level is significantly lower by international comparison, Koehler Paper adds. For deliveries in Europe, price increases were announced for April this year.

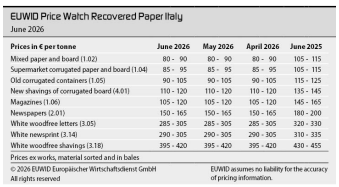
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Italian recovered paper prices stable in June

EUWID + 24 June 2026 | ~ 4 min | Published in issue 26/2026



EUWID Price Watch Recovered Paper Italy
June 2026

Prices in € per tonne	June 2026	May 2026	April 2026	June 2025
Mixed paper and board (1.02)	80 - 90	80 - 90	80 - 90	105 - 115
Supermarket corrugated paper and board (1.04)	85 - 95	85 - 95	85 - 95	105 - 115
Old corrugated containers (1.05)	90 - 105	90 - 105	90 - 105	115 - 125
New shavings of corrugated board (4.01)	110 - 120	110 - 120	110 - 120	135 - 145
Magazines (1.06)	105 - 120	105 - 120	105 - 120	145 - 165
Newspapers (2.01)	150 - 165	150 - 165	150 - 165	180 - 200
White woodfree letters (3.05)	285 - 305	285 - 305	285 - 305	320 - 330
White newsprint (3.14)	290 - 305	290 - 305	290 - 305	310 - 335
White woodfree shavings (3.18)	395 - 420	395 - 420	395 - 420	430 - 455

Prices ex works, material sorted and in bales

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There was little change on Italy's recovered paper market in June. Production activity in the paper industry was stable at average levels while collection volumes were low but sufficient. Against this backdrop, prices for ordinary recovered paper grades remained stable at the previous month's level. No price changes were recorded for the medium and higher grades either.

Italian waste management companies reported generally satisfactory business conditions in June. Prices for mixed paper and board (1.02), supermarket paper and board (1.04), and old corrugated containers (OCC, 1.05) were rolled over unchanged from May into June. Only in isolated cases were the lowest prices adjusted upward, pushing prices towards the upper end of the existing price range, without shifting the lower end of the range.

Demand from Italian paper mills – and from Asia – remained good, according to suppliers. Market participants told EUWID that most paper and board mills in the country were operating without interruption, although their order books were reportedly far from strong. One recycled containerboard producer stated that business remained challenging, but there were still enough orders to keep machines running. Overall, the market situation was described as stable compared with previous months.
At the same time, waste management companies reported relatively low collection volumes. Buyers confirmed that collection activity was generally weak. On the other hand, they also stated that they had no problems in sourcing recovered paper. " It's been a long time since I had to pick up the phone because I was short of recovered paper," commented one containerboard producer. None of the surveyed buyers complained about low inventories, which were generally described as average and normal in June.

Several suppliers confirmed that the supply of ordinary grades was generally adequate. "There is neither a surplus nor a shortage," said one of them. However, another market participant noted that once activity in the paper industry picks up again, there will no longer be enough material available for everyone.

By the end of June, however, there were no signs that such a scenario would materialise in the near future. There were no signs of a recovery in demand. As a result, most market participants expected little change in July. Paper and board mills are expected to operate at activity levels similar to those seen in June. The usual summer holiday shutdowns are expected in August. Some of them have already been announced, although details are still pending in many cases.

Market participants generally expect stable prices for ordinary recovered paper grades next month. A few suppliers did not rule out small price increases of a few euros, pointing to low collection volumes. Paper and board producers, however, argued that sufficient material was available. At the same time, they did not anticipate price decreases either. Supply remained too tight for prices to fall, said one market participant. One recycled containerboard producer added that lowering prices at this stage would

send the wrong signal to customers, especially after the effort required in recent months to push through higher prices for finished products.

Some low export prices rise slightly, but volumes remain stable

Export business with Asia was also described as relatively stable in June. Demand was said to be satisfactory. Some exporters said they could have sold more if additional volumes had been available or prices more attractive. Others reported demand consistent with recent months. In most cases, export volumes were similar to those in May. Indian buyers reportedly showed somewhat greater interest again recently.

Exporters in the Italian market frequently reported stable prices, although a few noted increases of €2-3/t at the lower end of the range. These were only minor adjustments and not a sign of a broader market turnaround, one supplier noted. Another supplier, however, saw indications that prices could move slightly higher in July. In June, Asian buyers paid €100-110/t ex works for Italian OCC, with isolated transactions reaching up to €115/t.

Prices for deinking grades were once again stable in June. Some suppliers said that magazines (1.06) had seen small increases of a few euros over the past two months, but these remained isolated cases. In general, prices were unchanged. Demand for the grade remained relatively stable. One buyer reportedly reappeared in the market after a long absence, although only for limited volumes, according to one source.

There was little change in the market for newspapers (2.01). Demand from the insulation sector reportedly weakened somewhat. The paper industry continued to purchase the usual volumes, and prices remained unchanged in June.

The market for higher grades was once again very quiet. Demand was described as unchanged. Rising pulp prices have still not had any noticeable impact on the grades that compete with fresh fibre. Consequently, prices for white letters (3.05), white newsprint (3.14), and white woodfree shavings (3.18) remained unchanged in Italy in June.

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Altri subsidiary Greenfiber objects to suspension of permitting process for Gama dissolving pulp project

EUWID + 24 June 2026 | ~ 2 min | Published in issue 26/2026

Greenfiber, a subsidiary of Portuguese pulp producer Altri, has filed objections against the government's plans to suspend and shelve the permitting process for the Gama dissolving pulp project in Palas de Rei, Galicia. The objections were submitted shortly before the expiry of a three-month deadline set by the Galician government after it initiated the procedure in February.

Authorities had moved to suspend the process because the substation earmarked for the project is not included in Spain's power grid plan through 2030, leaving the mill without a secured grid connection.

Greenfiber argues that the permitting process should continue. It points out that Gama was designated a strategic industrial project in 2022 and says its objections are based on legal, technical and administrative grounds.

According to the company, the planned dissolving pulp and textile fibre complex would be energy self-sufficient thanks to an integrated combined heat and power (CHP) system. An external grid connection would therefore serve only as additional backup. Greenfiber also says several technically viable connection alternatives exist and that applications for grid access have already been submitted.

The company believes the permitting process should continue in parallel with Spain's 2030 grid planning process. The Galician economy ministry said the objections would now be assessed.

The Gama project envisages 400,000 tpy of pulp capacity, with around half of the output intended for integrated production of textile fibres.

Weather and logistics hit Altri's first-quarter results

Altri's first-quarter Ebitda fell by more than 80 per cent year on year to €5.4m, while sales declined by more than 21 per cent. The company blamed storm-related disruptions in Portugal, logistical bottlenecks and lower net pulp prices.

Pulp production fell 20 per cent to 214,600 t. Dissolving pulp output dropped 36 per cent, while bleached eucalyptus kraft (BEK) pulp production declined 17 per cent. In addition to a scheduled maintenance downtime at the Celbi mill, several storms in January and February disrupted operations at Celbi, Biotek and Caima.

Altri expects profitability to improve significantly in the second quarter, supported by normalised operations, higher pulp prices and a better cost base.

Biotek conversion remains on schedule

Altri said the conversion of the Biotek mill from paper grade pulp to dissolving pulp remains on track for completion by the end of 2026. Customer qualification processes are ongoing in Asia and Europe.

The acetic acid and furfural project at Caima is nearing completion, with production scheduled to start at the end of June. A pre-industrial filament line for the group's textile fibre project is also being installed at the site.

Altri saw early signs of recovery in the pulp market going into the fourth quarter, citing stronger demand from Asia, particularly China, and several hardwood pulp price increases in Europe since the beginning of the year. Market conditions for dissolving pulp have also improved since March.

Altri results

million €	January - March 2026	2025
Key figures		
Sales	160	204
Cellulosic fibres	127	167
EBITDA	5	29
Operating result	6	18
Net result	-8	8
Pulp production (1,000 t)	215	267
BHKP	191	230
DWP	36	42
Pulp deliveries (1,000 t)	255	285
BHKP	218	243
DWP	36	42

Source: Altri

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Magnera sells UK plant for metallised paper in Caerphilly to Polyart Group

EUWID + 24 June 2026 | ~ 1 min | Published in issue 26/2026

Magnera Corporation is about to sell its Caerphilly, UK operations to French Polyart Group. In a press release Magnera explains that a strategic portfolio review induced it to initiate the sales process of the Caerphilly plant.

The plant near Cardiff (Glatfelter Caerphilly Ltd.) has 44 employees and specialises in the production of metallised paper for self-adhesive and wet glue labels for the food and beverage industries. According to Polyart, the plant will do business under the name of Polyart Metallised UK in the future.

Polyart Group has 280 employees and generates annual sales of €83m. The group manufactures film and paper solutions for the specialty label (industrial, decorative and security), digital printing and display markets and offers custom coatings. The group runs production plants in France, Germany, Great Britain and the USA. Moreover, it operates three sales offices in Singapore, Mumbai and Shanghai.

Magnera was created by the merger of specialty paper producer Glatfelter and the Health, Hygiene and Specialties (HHNF) business of Berry Global Group in November 2024.

The group runs 44 sites and has over 8,000 employees worldwide. Group sales most recently amounted to around $3.2bn.

The US company’s portfolio includes a broad range of material solutions, among them components for absorbent hygiene products, protective apparel, wipes, specialty building and construction products and products serving the food and beverage industries such as tea bag paper, coffee filters and absorbent pads for food packaging.

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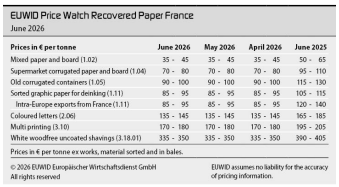
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June brought fewer logistics issues and stable prices for France's recovered paper market

EUWID + 24 June 2026 | ~ 4 min | Published in issue 26/2026

The French recovered paper market was generally balanced in June. Following the logistical bottlenecks seen in May, transport conditions eased, and recovered paper supply became easier to manage. Prices across all grades held steady at the previous month's level.



EUWID Price Watch Recovered Paper France
June 2026

Prices in € per tonne	June 2026	May 2026	April 2026	June 2025
Mixed paper and board (1.02)	35 - 45	35 - 45	35 - 45	50 - 65
Supermarket corrugated paper and board (1.04)	70 - 80	70 - 80	70 - 80	95 - 110
Old corrugated containers (1.05)	90 - 100	90 - 100	90 - 100	115 - 130
Sorted graphic paper for deinking (1.11)	85 - 95	85 - 95	85 - 95	105 - 115
Intra-Europe exports from France (1.11)	85 - 95	85 - 95	85 - 95	120 - 140
Coloured letters (2.06)	135 - 145	135 - 145	135 - 145	165 - 185
Multi printing (3.10)	170 - 180	170 - 180	170 - 180	195 - 205
White woodfree uncoated shavings (3.18.01)	335 - 350	335 - 350	335 - 350	390 - 405

Prices in € per tonne ex works, material sorted and in bales.

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The market for ordinary grades was uneventful in June. Demand from the paper industry was stable and followed normal seasonal patterns. Corrugated case material manufacturers contacted by EUWID said that they had not taken downtime and continued to purchase the usual amounts of recovered paper, a view echoed by waste management companies.

Market players were also able to breathe a little easier when it came to sourcing and delivering recovered paper. In May, France's four public holidays had led to widespread disruption. The logistics situation, typically stretched at this time of year, had been particularly strained this year, insiders told EUWID. High fuel costs meant fewer lorries on the road, and the driver shortage was felt more acutely, resulting in delivery problems and delays in May. However, the situation has reportedly eased noticeably in June. Although some buyers continued to report occasional bottlenecks, particularly in eastern France, overall, supply was now largely running smoothly again.

Paper mills described the availability of ordinary recovered paper grades as good as a result. For their part, waste management companies reported that collection volumes remained low, with one business reporting a 5 per cent drop in volumes received at its own collection centres since the start of the year. Nonetheless, they confirmed that paper mills were adequately supplied, a situation some linked to the currently muted export business with Asia.

Overall, supply and demand on the French market were broadly balanced, leaving prices for mixed paper and board (1.02), supermarket paper and board (1.04) and old corrugated containers (OCC; 1.05) unchanged in June. The higher spot prices observed in April and, in some cases, in May – especially in deals with German buyers – have now disappeared, sources said. Several contacts told EUWID that the market situation had largely settled down again.

The export market was likewise largely unchanged. Although France is not currently shipping large volumes to Asia, exporters said that they were satisfied with sales activity. Demand itself was not an issue, one trader remarked, but the prices that could be achieved were not compelling. Overall, volumes sold into Far Eastern markets were described as relatively stable in June.

Export prices for OCC changed little if at all in June. With transport costs and, consequently, the cost of deliveries to ports having risen somewhat, the FAS price was sometimes a little higher and could reach up to €130 FAS. Ex-works prices, however, were either unchanged or increased by just a couple of euros, market players consistently reported. OCC destined for Asian markets was trading at around €105-110/t ex works in June.

July expected to be a slow month

July is not expected to bring any major changes on the French recovered paper market. A few buyers said that they would welcome a small price cut for ordinary recovered paper grades sooner or later to offset April’s €10 hike. However, contacts surveyed in mid-June did not expect such a move next month. One market player pointed to the balanced market. Another noted that some paper mills were not planning any downtime in August and would therefore need material. At the same time, buyers ruled out higher prices in July in view of the ample availability of material. In the week commencing 15 June, contacts surveyed by EUWID regarded stable prices for the ordinary grades as the most likely scenario.

Business proceeded as usual on the market for sorted graphic paper for deinking (1.11). Within France, demand was described by several market players as steady and good, with prices remaining stable. Exports to neighbouring countries also cost the same as in May, even though demand there continues to be fairly weak. Insiders explained that collection volumes were likewise low, and the market balanced.

Short-lived downtime in the tissue industry

Two key players in the tissue industry recently took brief downtime, leading to a temporary easing in demand for coloured letters (2.06). At the same time, a waste management company reported there had been some demand from Asia for the grade, helping to keep prices the same.

The multi printing (3.10) and white woodfree uncoated shavings (3.18.01) sectors remained very quiet. “Nothing is moving,” one source remarked, noting that prices had now been flat for several months, including in June. The increase in pulp prices is showing no impact on demand for high recovered paper grades, a situation attributed in part to the substantial discounts currently being granted on pulp.

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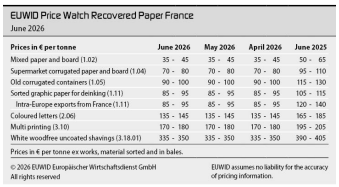
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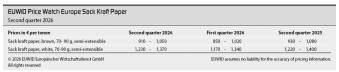
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Sack kraft paper market sees a mixed pattern of Q2 price hikes

Buyers from Germany and Italy report a noticeable increase in prices

EUWID + 24 June 2026 | ~ 3 min | Published in issue 26/2026


EUWID Price Watch Europe Sack Kraft Paper
Second quarter 2026

Prices in € per tonne	Second quarter 2026	First quarter 2026	Second quarter 2025
Sack kraft paper, brown, 70–90 g, semi-extensible	950 – 1,050	870 – 1,020	930 – 1,090
Sack kraft paper, white, 70–90 g, semi-extensible	1,230 – 1,370	1,170 – 1,340	1,220 – 1,400

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The European sack kraft paper market was shaped by steep cost hikes linked to the war in Iran in the second quarter of 2026. Paper sack producers came under pressure from both the paper industry and plastic manufacturers. Brown and white sack kraft paper producers had already formulated plans for April price hikes during the first quarter, before the start of the Iran conflict gave these demands a new urgency.

In most cases, the paper industry was initially seeking rises of around 8 to 12 per cent. However, the actual price hikes implemented for second-quarter deliveries turned out to be far more varied. Industry sources from Europe told EUWID that April increases for brown and white sack kraft paper grades ranged from about €30/t to €80/t, with some reports of even higher, three-digit hikes, though these are not seen as representative for the whole market. At the same time, contacts in the paper and packaging sectors said that mills were already signalling a new round of mark-ups from July onwards.

For second-quarter deliveries, a few industry insiders, especially those from Italy and Germany, tend to report comparatively large increases, depending on call-off volumes and the previous price level. They put the rises for both brown and white grades at €60-80/t between April and the end of June, although there are also reports of increases of €30-50/t. In these latter cases, negotiations on further hikes from July are said to be under way.

In the UK, by comparison, the increases implemented in the second quarter appear to have been smaller to date, with sources mentioning mark-ups of about £20/t. Talking to EUWID, contacts said that this was due to subdued demand and strong competition in the UK.

Mills typically point to broad-based cost hikes in recent months, especially for wood, transport and energy, as the rationale for both the latest increases and further demands. One producer stressed the “need to start making money again.”

For their part, paper sack producers had reportedly sought to push back by arguing that there was still room to improve machine utilisation. They described business in the second quarter as broadly in line with last year’s seasonal pattern. Orders from the construction, cement and chemical sectors were still lagging expectations, insiders noted. By contrast, segments such as milk powder and seed were seeing comparatively solid demand.

Paper producers report healthy machine utilisation rates. During the quarter, inventory building along the supply chain has at times contributed to longer lead times and stronger order books. Some mills expressed concerns that this could eventually lead to a noticeable slowdown in incoming orders in the remainder of the year.

Soaring PE resin prices piling additional pressure on packaging producers

Paper sack producers report that, besides higher paper prices, sharp increases in polyethylene resin costs are adding to the pressure and eroding margins. For instance, food-grade sacks require a polyethylene barrier layer, making PE an essential raw material.

EUWID research indicates that prices for several PE film grades, including LDPE and LLDPE, have risen by as much as €1,200/t on average in the two months since the outbreak of the war in Iran. Although polyethylene film represents only a minor component of a paper sack, market participants said that the scale of the price increases and the uncertainty surrounding PE supply have become a major concern for buyers.

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EUWID PULP AND PAPER www.euwid-paper.com | Retrieved 26 June 2026

Decor paper manufacturers and converters have differing views about how prices will develop

EUWID + 24 June 2026 | ~ 2 min | Published in issue 26/2026

The price hikes instituted by several producers of decor paper produced in April or May 2026 onwards remain under fire from converters. A few companies have already warned that, if current price levels are maintained, they intend to shift at least part of their orders to alternative suppliers. Such shifts are being facilitated by weaker demand in the second quarter, both for deliveries from European and Chinese suppliers.

Chinese decor paper imports had become more attractive again in the spring thanks to price concessions. However, the subsequent increase in container freight rates has squeezed that advantage. Long lead times, sometimes exceeding 10 weeks, and delivery irregularities are adding to the constraints.

For their part, most European decor paper producers want to hold on to the price rises and surcharges they have pushed through so far. High-volume grades have typically seen increases of around €15-20/100 kg, though a few buyers have managed to cap the hike at €10-15. Pre-impregnated paper prices have recently risen more than those for melamine paper.

Although their order intake becomes thinner, a few manufacturers are lining up their next price move for production from July. Preliminary notices issued in May are now being translated into concrete demands. The aim is to make up for cost hikes. Pulp prices have risen sharply in recent months, although this trend is expected to level off over the summer. Titanium dioxide prices are now projected to head higher, as well.

Decor paper mills have seen their capacity utilisation declining as output in key customer industries has been cut back sharply. The resulting loss of demand was only partly absorbed by downtime over Easter and Whitsun. A few lines were idled for a week or ten days at Easter and for more than a week around Whitsun. More downtime was already rolled out by some companies in May, and June has brought further shutdowns of up to a week. In July and August, decor paper producers plan to basicly rely on their regular holiday stoppages, which, at around ten days to two weeks, are expected to run slightly longer than in recent years.

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EUWID PULP AND PAPER www.euwid-paper.com | Retrieved 26 June 2026

Wepa shuts down old tissue machine at Bridgend

EUWID + 24 June 2026 | ~ 1 min | Published in issue 26/2026

Tissue paper and products manufacturer Wepa has taken an older tissue machine at its Bridgend mill in the UK out of operation as planned, paving the way for a major modernisation project at the site.

The machine is to be replaced by a new unit with a capacity of 70,000 tpy that will consume less water and energy while enabling a higher share of recovered paper to be used as a raw material. Start-up of the new tissue machine is scheduled for 2027, a company spokesperson confirmed to EUWID.

Previous company statements indicate that Wepa also intends to install two new converting lines and modernise the site's palletising operation.

The Bridgend mill in Wales manufactures toilet tissue and kitchen towels for the UK consumer market. The site employs around 345 people and has been part of the Wepa Group since 2013.

In addition to Bridgend, Wepa operates a second UK site in Blackburn. The facility specialises in sanitary paper products for the professional market and has an annual tissue converting capacity of 27,000 tonnes. Around 130 people are employed at the site. The Blackburn site, formerly operated by Star Tissue UK, has been part of the Wepa Group since 2024.

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Dunapack starts up new corrugator in Turkey

EUWID + 24 June 2026 | ~ 1 min | Published in issue 26/2026

Dunapack Packaging commissioned a new corrugator at its Eskişehir packaging plant to expand its corrugated board production capacities in Turkey. The company, a subsidiary of Austrian Prinzhorn group, launched the new corrugated board line at the site in June, replacing an existing plant, a spokeswoman said in response to query from EUWID. The corrugator will increase the capacity of the western Turkish site from 150 million m² to around 230 million m² of corrugated board.

The new corrugator has a width of 2.8 m and a production speed of 450 m/min. The BHS machine is designed for E, B, C, EB and BC flutes.

The investment project worth €13.5m includes the corrugator and associated equipment, and expansion of the production hall. The expanded production capacities will address the domestic market in Turkey as well as international demand.

From Eskişehir, Dunapack Packaging supplies customers in the food, ceramics, fruit and vegetables and household goods sectors, among others, the company told EUWID. Founded in 1997, the plant employs 248 persons and has a production area of roughly 46,000 m².

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Bellmer delivers new paper machine to Delfort

EUWID + 24 June 2026 | ~ 1 min | Published in issue 26/2026

Finnish speciality paper manufacturer Delfort is setting up a new production line for pressboard used in electrical insulation. Supplied by machine builder Bellmer, the new PM will be installed at the Tervakoski paper mill in Finland and is scheduled to go into operation in 2027. Delfort explained that the investment is a response to the increasing global demand for electrical insulation materials, which is driven by the expansion of power grids as well as the renewal of obsolete infrastructure.

The new production line will be integrated into the site's renewable energy concept involving electrified steam generation and use of industrial heat recovery.

In addition to thin papers, Delfort also produces cigarette and insulating paper as well as specialty paper for food and non-food packaging at the Tervakoski paper mill. Delfort operates four PMs and a supercalender at the site and has production capacity for around 90,000 tpy.

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EUWID PULP AND PAPER www.euwid-paper.com | Retrieved 26 June 2026

Drewsen announces price increase

EUWID + 24 June 2026 | ~ 1 min | Published in issue 26/2026

Due to rising raw material costs, **Drewsen Spezialpapiere** announed a price increase for its uncoated woodfree specialty papers. The adjustment will range between 6 and 8 percent depending on the product segment and will apply to deliveries from 1 July. Customers will be informed directly by the sales team, the company said.

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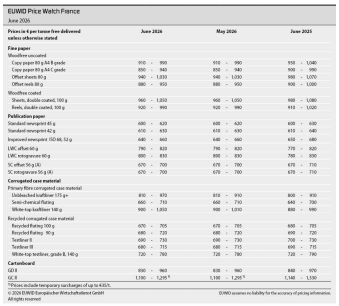
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France: Publication paper price talks almost done, fine paper price rises coming to an end

Kraftliner prices rise in mid-June / GC price increases slow to materialise

EUWID + 24 June 2026 | ~ 10 min | Published in issue 26/2026



EUWID Price Watch France
June 2026

Prices in € per tonne free delivered unless otherwise stated	June 2026	May 2026	June 2025
Fine paper			
Woodfree uncoated			
Copy paper 80 g/m² A4 B grade	910 - 990	910 - 990	950 - 1,040
Copy paper 80 g/m² A4 C grade	850 - 940	850 - 940	900 - 990
Offset sheets 80 g	940 - 1,030	940 - 1,030	980 - 1,070
Offset reels 80 g	880 - 950	880 - 950	900 - 1,000
Woodfree coated			
Sheets, double-coated, 100 g	960 - 1,050	960 - 1,050	980 - 1,080
Reels, double-coated, 100 g	920 - 990	920 - 990	950 - 1,020
Publication paper			
Standard newsprint 45 g	600 - 620	600 - 620	600 - 630
Standard newsprint 42 g	610 - 630	610 - 630	610 - 640
Improved newsprint 150 ML 52 g	640 - 660	640 - 660	650 - 680
LWC offset 60 g	790 - 820	790 - 820	770 - 820
LWC rotogravure 40 g	800 - 850	800 - 850	780 - 830
SC offset 50 g (A)	670 - 700	670 - 700	670 - 710
SC rotogravure 50 g (A)	670 - 700	670 - 700	670 - 710
Corrugated case material			
Primary fibre corrugated case material			
Unbleached kraftliner 175 g/m²	810 - 870	810 - 910	800 - 910
Semi-chemical fluting	660 - 710	660 - 710	640 - 700
White-top kraftliner, 140 g	900 - 1,010	900 - 1,010	860 - 990
Recycled corrugated case material			
Recycled fluting 100 g	670 - 705	670 - 705	680 - 735
Recycled fluting 90 g	680 - 720	680 - 720	690 - 720
Testliner II	690 - 730	690 - 730	700 - 730
Testliner III	680 - 715	680 - 715	690 - 715
White-top testliner, grade II, 140 g	720 - 760	720 - 780	720 - 790
Cartonboard			
GD II	890 - 960	890 - 960	840 - 970
GC II	1,100 - 1,260 *	1,100 - 1,260 *	1,140 - 1,300

* Prices include temporary surcharges of up to €35/t.

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In the French newsprint market, negotiations for third-quarter prices were in their final stages in the penultimate week of June. It became apparent that there would be small price increases, particularly for newsprint and also for SC paper, often building on the price movements seen in the second quarter. There were also calls for further fine paper price increases in June. However, it became apparent that the bulk of the most recent price movements had been implemented in April and May.

Price increases for brown and white-top kraftliner, originally scheduled for 1 June, were implemented only from the middle of the month while prices for recycled containerboard grades remained unchanged. Prices for GC board are edging upward, albeit at a slow pace. The first price hikes were implemented in May and held in June, with full implementation expected in July.

Fine paper price increases level off in June

Following price increases for woodfree coated and uncoated paper in France in April and May, some manufacturers announced further price rises in June. However, comments from market contacts suggest that after the increases implemented in April and May, June only saw a few isolated additional price adjustments.

Manufacturers reported that prices for uncoated grades had risen by up to €50/t over the past three months, whilst figures for coated paper reached as high as €60 or even €70/t. Furthermore, the magnitude of the price increases implemented vary considerably, reflecting differences in the base prices to which the increases were applied. Most prices on the market are currently valid only until further notice.

Buyers stated that prices had risen in April and May, in some cases “erratically”, and that there had been no further price increases in June.

Some market sources reported that low-priced offers had reappeared on the market in June, thereby undermining attempts to push through price increases. Some manufacturers remained determined in implementing the latest round of price increases, whilst others “probably didn’t feel the need for the increase” or at least gave the impression they didn’t, according to market insiders. “We could certainly have done with a second increase,” one manufacturer said.

Demand for woodfree coated and uncoated paper has slackened, according to producers. One manufacturer stated that its order intake in June was very weak, whilst another sees this as the result of stockpiling ahead of the price rises, combined with the usual seasonal trends. Many customers are already relatively well-stocked for the summer.

Up to April, the market for woodfree coated paper in France had remained roughly at the previous year's level in terms of delivery volumes, mirroring the Western European market as a whole. The market for uncoated fine paper had shrunk by a few percentage points, in line with the trend seen across Western Europe. Since then, demand has cooled, and some market participants fear this will lead directly into a pronounced summer slump. At present, there are hardly any indicators suggesting a general market recovery.

The fact that price increases are being accepted in such a market situation – which is, moreover, characterised by chronic overcapacity – is primarily due to the financial pressure on manufacturers, some of whom were operating at a loss or were generating only meagre profits prior to the most recent price rises.

Publication paper manufacturers demanding price increases in the third quarter

In the second half of June, manufacturers and buyers of newsprint in France had already concluded a number of contracts for the third quarter or the entire second half of the year. Negotiations centred on price increases of varying magnitudes demanded by the manufacturers, parts of which have been implemented in the contracts already signed.

Producers of newsprint had entered negotiations demanding price increases of mostly €20-30/t. At the higher end, demands for the third quarter reached €50/t in isolated cases, as did those for half-year contracts, where prices had remained unchanged in the second quarter.

By the end of the penultimate full week of June, market sources reported that deals had been concluded at levels below the manufacturers' demands. There was talk of increases of €10 or €20/t following rises already implemented in the second quarter, or of €30 or a maximum of €40/t in total for half-yearly prices. However, some negotiations were still ongoing, with the aim of finalising all contracts by the end of June.

In the market for SC paper, manufacturers and buyers are also reporting price increases, albeit smaller than those for newsprint. Following minimal price rises in the second quarter, market participants estimate that further small increases of around €10/t could be finalised in the third quarter. "The aim is to achieve a total increase of €30-40/t for the second and third quarters combined," explained one manufacturer. At the other end of the scale is the statement from a buyer who anticipates a total increase of around €15/t for the two quarters.

Manufacturers in the LWC market are also pushing for further price increases. However, the situation here is even more mixed: whilst there had already been price rises of up to €30 in the second quarter, looking back, these increases varied considerably depending on the manufacturer and the customer. In some cases, manufacturers had settled for smaller increases, and, according to market insiders, are seeking to make up for the shortfall in the current round of price negotiations. Comments from manufacturers regarding the current price talks range from "we want a further €10/t on top of the second quarter" to "we are demanding an increase of €20/t". Buyers, by contrast, said that there will be no increase for Q3, or one only amounting to €10-20 which, combined with the second quarter, would then amount to €30 or a maximum of €40/t.

Kraftliner prices rise mid-month

Prices for kraftliner have risen in France, for both brown and uncoated white-top grades. Manufacturers had aimed for increases of mostly €80/t with effect from 1 June, but these were not implemented until mid-month. From 15 June, brown kraftliner costs €60/t more, whilst prices for white-top kraftliner have mostly risen by €40/t, although there were isolated reports of price increases of €60/t.

Buyers confirm that the increase was, in principle, non-negotiable. The market for kraftliner is described as balanced, though some market participants view it as downright tight. Manufacturers say that demand remains good and that there is no surplus capacity for kraftliner. On the contrary, several mills are currently taking planned technical downtime, while shipments of US kraftliner to Europe are lower than last year.

The prevailing view in the market is that this kraftliner price increase was, for the time being, the last. It is said that, even if further price rises could potentially be enforced, they would widen the price gap to recycled grades too much.
Prices for recycled grades remained largely stable in France in June, for both brown and white grades.

Demand for recycled corrugated case material in France is generally described by manufacturers as adequate, though it is weakening slightly in some areas. Stock levels remain well below last year's figures, and there are currently no signs of overproduction.

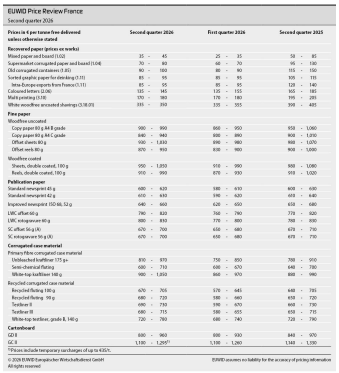
What distinguishes the market for recycled grades from that of kraftliner is the overcapacity and the fact that producers are not operating at full capacity. Market insiders currently estimate the average capacity utilisation rate among manufacturers in Europe to be around 87 per cent. To increase this figure, the corrugated board market would need to grow, but such growth is not currently in sight. Market participants report a slight year-on-year decline in corrugated board sales figures in Europe during the first half of the year. In order to reduce the current overcapacity, moderate growth of 2-3 per cent per annum would be required over the next few years. Economic growth remains subdued at present due to the consequences of the war in Iran, and the recent slight rise in inflation is also having an impact on consumer behaviour.

A better balance between output capacity and demand can therefore only be achieved through further plant closures, something that has already taken place on a large scale over the past two and a half years. Industry players see a further need for closures, some of which are expected in the near future, particularly as new production capacity comes on stream.

On the cost side, manufacturers in France report that waste paper prices stagnated in June. Freight costs have risen slightly in some areas, so some ex-works prices have been adjusted accordingly, although this had little overall impact.

Higher GC board prices not yet implemented throughout the market

On the French cartonboard markets, the month of June in many ways represented a continuation of May. The price hike for GC 2 announced by producers of fresh-fibre board (folding boxboard – FBB) is still being implemented in



EUWID Price Review France

Second quarter 2026

Prices in € per tonne free delivered unless otherwise stated	Second quarter 2026	First quarter 2026	Second quarter 2025
Recovered paper (prices ex works)			
Mixed paper and board (1.02)	35 - 45	25 - 35	50 - 85
Supermarket corrugated (paper and board) (1.04)	70 - 80	60 - 70	95 - 130
Old corrugated containers (1.05)	90 - 100	80 - 90	115 - 150
Sorted graphic paper for blending (1.11)	85 - 95	85 - 95	105 - 135
Ilena-Europa exports from France (1.11)	85 - 95	85 - 95	120 - 140
Coloured flotters (2.06)	135 - 145	135 - 155	165 - 185
Matt printing (3.18)	170 - 180	170 - 180	195 - 285
White-woodfree uncoated shavings (3.18.01)	355 - 359	335 - 355	390 - 440
Fine paper			
Woodfree uncoated			
Copy paper 80 g A4 B grade	900 - 990	860 - 950	950 - 1,060
Copy paper 80 g A4 C grade	840 - 940	800 - 890	900 - 1,010
Offset sheets 80 g	900 - 1,030	890 - 980	900 - 1,020
Offset reels 80 g	870 - 910	830 - 900	900 - 1,000
Woodfree coated			
Sheets, double coated, 130 g	950 - 1,050	930 - 990	980 - 1,080
Reels, double coated, 130 g	910 - 990	870 - 930	950 - 1,020
Publication paper			
Standard newsprint 45 g	600 - 620	580 - 610	600 - 630
Standard newsprint 42 g	610 - 630	590 - 620	610 - 640
Improved newsprint (SO-IBL 52 g)	640 - 660	620 - 650	650 - 680
LWC, offset 60 g	790 - 820	760 - 790	770 - 820
LWC, rotogravure 40 g	800 - 850	770 - 800	780 - 830
SC, offset 56 g (A)	670 - 700	650 - 680	670 - 710
SC, rotogravure 56 g (A)	670 - 700	650 - 680	670 - 710
Corrugated case material			
Primary fibre corrugated case material			
Unbleached kraftliner 175 g+	850 - 970	750 - 850	780 - 950
Semi-chemical fluting	680 - 730	630 - 670	640 - 700
White-top kraftliner 148 g	980 - 1,050	860 - 970	880 - 980
Recycled corrugated case material			
Recycled fluting 130 g	670 - 705	570 - 645	640 - 705
Recycled fluting 99 g	680 - 720	590 - 660	650 - 720
Testliner II	690 - 730	590 - 670	660 - 730
Testliner III	680 - 715	580 - 655	650 - 715
White-top testliner, grade B, 140 g	720 - 780	680 - 740	720 - 790
Cartonboard			
GD II	880 - 960	830 - 930	840 - 970
GC II	1,100 - 1,260*	1,100 - 1,260	1,140 - 1,330

*Prices include temporary surcharges of up to €35/t.

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several cases. In the recycled board (white-lined chipboard – WLC) segment, by contrast, the price step for GD 2 has already gone through for the most part.

In June, market participants reported relatively stable demand for FBB and WLC in France. While they were not seeing any decline, there was no improvement either. “Demand is neither good nor bad,” summarised one GC board producer. Some market participants had experienced slightly higher order intake in recent months, which they attributed to customers ordering more ahead of price increases, while others did not notice any marked difference. In June, however, such a trend was barely mentioned anymore. On the whole, the demand trend seen in recent months continued on a similar trajectory for both cartonboard grades. Some producers added that their delivery volumes were also broadly in line with last year’s levels.

Despite the lack of new demand impetus and generally weak consumption, price hikes for cartonboard are being implemented or have already been achieved. With the start of the conflicts in the Middle East and rising energy prices in March, producers urgently needed to raise their sales prices to pass these costs along to their customers. In their price hike announcements, they cited not only energy costs but also many other factors that have become more expensive, such as transports, chemicals and personnel.

On the GD board market, the majority of prices were already adjusted during the past two months. Insiders here usually mentioned mark-ups of €25-35/t for GD 2. In June, there were no further steps and prices held steady. However, some customers have yet to see higher prices, notably those with contracts that run through the end of June. These contracts are expected to be repriced from the beginning of July.

The price round in the market for GC board has proven to be slightly more complicated, EUWID was told. In general, producers here were taking a more gingerly approach than their peers in the WLC segment. As one respondent pointed out, there is more competition in this market because there are more players. Moreover, some cartonboard producers in this segment are said to be pursuing a very aggressive pricing strategy.

GC producers had also announced price hikes, but these sometimes came at a later date or implementation was postponed. In the meantime, however, all major players have informed their customers about higher prices for GC 2. The targeted amounts are €35-80/t. In contrast to GD board, these were sometimes declared as temporary surcharges which are to be rescinded again when energy prices fall. Yet, there are other players who plan to integrate the increases directly in their prices.

After the first mark-ups for GC 2 were implemented for deliveries in May, some more went through in June. In these cases, prices were often raised by around €35-40/t. However, several prices still have not been touched, said respondents surveyed in mid-June. Some producers are planning adjustments for deliveries in July, especially since some quarterly or half-year contracts are expiring. One smaller producer said it would likely take the entire third quarter to achieve full implementation with all customers.

By contrast, players in the WLC market anticipate that prices will remain stable for the time being in July. Even though cartonboard producers – including those in the FBB segment – all agree that the latest price hikes will not be sufficient in the long term, a further price step was not on the horizon in June. On the contrary, one producer commented that it might become difficult to maintain the current price level for GD board, as the demand picture this summer was not looking good.

For both GD as well as GC board, market participants are now tending towards signing contracts with a shorter duration because they want to remain flexible and have the ability to react to potential cost increases.

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Germany: Not all fine paper manufacturers are satisfied with outcome of price negotiations

Primary fibre containerboard grades see another round of price increases

EUWID + 24 June 2026 | ~ 6 min | Published in issue 26/2026

Despite the nervousness and dissatisfaction prevailing on the market for woodfree graphic paper, it appears that June is a transitional month providing greater stability. In most cases, prices for coated and uncoated fine paper were lifted in the preceding months and sellers now want to ensure these levels become firmly established. At the same time, though, price hikes are also still a topic in summertime transactions.

On the kraftliner market, the planned price increases are being implemented on the German market from the middle of June. Initial plans to introduce a mark-up from the beginning of the month were abandoned relatively quickly, so 15 June is now the implementation date for the latest round of price increases for brown and white-top kraftliners. However, a different approach was taken for semi-chemical fluting.

German fine paper market enters stabilisation phase in June

The fine paper market is proving slow to settle down. Most respondents had expected June to be a month of stabilisation, in terms of both the prices achieved so far as well as capacity utilisation of fine paper machines. However, suppliers and buyers generally confirm that differing activity levels at the mills have also resulted in differing strategies. Although intense price negotiations over the past three months resulted in higher prices for graphic papers, mills continue to face extremely challenging market conditions. Demand for paper continues to decline, while producers must simultaneously cope with rising costs. It is hardly surprising that dissatisfaction and nervousness continue to characterise the fine paper market.

Some paper mills that are far from satisfied with the increases achieved so far continue to push for further price hikes. However, industry experts often question whether another round of price hikes for the third quarter stands much chance of success. At present, demand for woodfree papers is being dampened by typical seasonal effects. Demand for coated fine papers in particular softened noticeably in May and June, according to market experts.

Paper mills have felt the impact. In the competition for volumes, some producers continued to make concessions, particularly in the coated fine paper segment. According to market participants, special deals and project prices have not yet disappeared entirely. Others, however, say their priority is to maintain stable prices through the summer and avoid any further erosion.

Looking back at the past months, however, market experts note that the European paper industry has successfully applied a lot of pressure to considerably raise prices. Following massive price erosion that continued into the first quarter of 2026, paper producers have been making every effort since April to bring selling prices in line with rising costs.

With many mills facing losses, producers of woodfree papers responded by announcing price increases, often on a monthly basis. Paper mills unanimously report that incremental increases of up to €50-60/t were implemented for both uncoated and coated fine paper. Compared with the lowest prices charged by some mills at the beginning of the year, cumulative price

increases now amount to €80/t or more.

Some market participants report that a further round of price increase initiatives is being considered by a number of paper mills for July deliveries. According to industry sources, not all target price levels have yet been achieved for either copy and offset papers or coated fine papers, owing to intense competition among suppliers. In addition, some longer-term supply agreements due to expire at mid-year, as well as certain special pricing arrangements that remained in place during the second quarter, have resulted in price increases that producers consider insufficient. Representatives of the paper industry therefore say that further catch-up is still needed in some parts of the market.

A few producers of copy paper also adjusted prices here and there in June, while quotes for offset reels and sheets remained stable.

Meanwhile, market participants agree that operating rates vary considerably across the woodfree paper market. Some paper mills, merchants and printers say they are reasonably satisfied with their current level of business. Nevertheless, uncertainty continues to weigh on the paper and printing industries, with concerns about future market developments remaining widespread.

The consolidation pressure is almost unbearable, say experts, describing the mood during the sluggish summer season. Since there are not enough economically attractive deals and costs are high, players need to take action in many areas, industry experts stress. However, players are not willing to give in to demands from some buyers for price cuts or summer discounts, EUWID was told. Instead, there are reports about plans to temporarily idle production.

Prices for kraftliner rise as of mid-June

On the German market for fresh-fibre corrugated case material, price increases are taking effect as of mid-June. In May, producers of kraftliner had announced plans to raise prices again. For the most part, they were asking for an additional €80/t for brown and white-top kraftliner, according to market participants. Buyers had also been informed of price hikes for semi-chemical fluting as of June, the EUWID market survey found.

Initially, the calls by paper mills focused on implementation either as of 1 or 15 June. However, interviews with market insiders early in June revealed that a price hike at the beginning of the month proved to be impossible. So, negotiations in the German market ultimately concentrated on the mid-month timing.

The hikes were thus due to take effect on 15 June, according to market participants. In general, paper producers as well as corrugated board plants mentioned price hikes of €60/t for brown kraftliner and €40/t for white-top kraftliner. This means that the cumulative price increases for brown kraftliner in Germany since April amount to a maximum of €120/t, according to market participants. For white-top kraftliner, the uptick over the same time period can be as high as €80/t.

There were scattered reports from the market about the current hikes being implemented in two instalments as of 15 June and 1 July. But this approach was not widespread in the German market, according to currently available information. The majority of market players surveyed said that mid-June was the implementation date. Customers in the corrugated industry had at times tried to delay the entire price hike until July, but paper mills were not willing to accept this.

According to industry insiders, the reasons for this were ongoing good capacity utilisation on kraftliner machines and slightly

tighter availability of fresh-fibre containerboard grades. At the time of the market survey, only the originally allocated volumes were being delivered, with hardly any material being available on short notice.

Market participants did not report any further price movement for now for semi-chemical fluting following the implementation of hikes in the previous month. Some market participants believe hikes in July cannot be ruled out.

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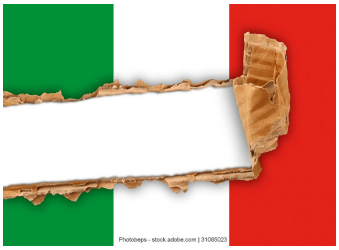
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New price hikes for corrugated case material fail to materialise on the Italian market in June

Fine and publication paper producers target July deliveries

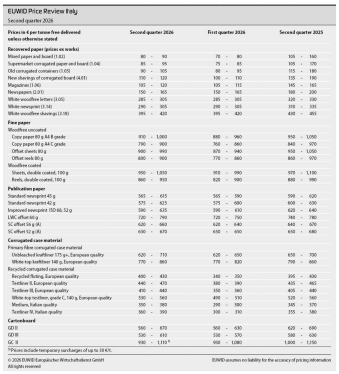
EUWID + 24 June 2026 | Igor Dugandžić | ~ 11 min | Published in issue 26/2026



Several producers had announced further price increases for fresh and recycled fibre-based containerboard for June deliveries, but implementation in Italy has been postponed until July. Producers of kraftliner, in particular, remain confident that the increases can be achieved. Market respondents describe supply as relatively tight, partly due to lower shipments from the US.

Producers are aiming to raise prices for publication and fine papers from July. While new prices for newsprint and magazine papers have largely been settled, implementation of a second round of increases for fine papers is proving more difficult than producers had initially anticipated. Price discussions for July deliveries in the Italian cartonboard market have been surprisingly quiet. Going forward, producers would prefer to consolidate higher prices implemented in the second quarter, but are facing growing resistance from customers.

First round of hikes for fine paper holds, with additional increases a source of contention


EUWID Price Review Italy
Second quarter 2026

Prices in € per tonne free delivered unless otherwise stated	Second quarter 2026	First quarter 2026	Second quarter 2025
Recovered paper (prices ex works)			
Mixed paper and board (1.02)	80 - 90	70 - 80	105 - 160
Supermarket corrugated paper and board (1.04)	85 - 95	75 - 85	105 - 170
Old corrugated containers (1.05)	90 - 105	80 - 95	115 - 180
New shavings of corrugated board (4.01)	110 - 120	100 - 110	135 - 190
Magazines (1.06)	105 - 120	105 - 115	145 - 192
Newspapers (2.01)	150 - 165	150 - 165	180 - 200
White-woodfree letters (1.03)	285 - 305	285 - 305	320 - 330
White newsprint (1.14)	290 - 305	290 - 305	310 - 335
White-woodfree sluicings (1.08)	395 - 420	395 - 420	400 - 455
Fine paper			
Woodfree uncoated			
Copy paper 80 g, B4 B grade	970 - 1,060	880 - 960	950 - 1,050
Copy paper 80 g, B4 C grade	790 - 960	760 - 860	840 - 970
Offset sheets 80 g	990 - 990	870 - 940	950 - 1,050
Offset reels 80 g	880 - 960	770 - 860	860 - 970
Woodfree coated			
Sheets, double coated, 100 g	990 - 1,050	910 - 990	970 - 1,100
Reels, double coated, 100 g	860 - 910	820 - 900	880 - 990
Publication paper			
Standard newsprint 45 g	565 - 615	565 - 590	590 - 620
Standard newsprint 42 g	575 - 625	575 - 600	600 - 630
Improved newsprint (SC-A), 52 g	590 - 635	590 - 610	620 - 640
LWC offset 60 g	720 - 740	720 - 750	740 - 780
SC offset 56 g (A)	620 - 660	620 - 640	640 - 670
SC offset 52 g (A)	600 - 670	600 - 650	650 - 680
Corrugated case material			
Primary fibre corrugated case material			
Unbleached kraftliner 175 g/m, European quality	620 - 710	620 - 650	650 - 700
White-top kraftliner 140 g, European quality	770 - 860	770 - 820	790 - 860
Recycled corrugated case material			
Recycled fluting, European quality	400 - 430	340 - 350	395 - 430
Testliner II, European quality	440 - 470	360 - 390	435 - 460
Testliner III, European quality	450 - 480	350 - 360	405 - 480
White-top testliner, grade C, 140 g, European quality	530 - 560	490 - 530	520 - 560
Medium, Italian quality	350 - 380	290 - 300	365 - 370
Testliner III, Italian quality	360 - 390	300 - 310	370 - 380
Cartonboard			
GD II	560 - 670	560 - 630	620 - 690
GD III	530 - 610	530 - 570	580 - 630
GC-B	990 - 1,110 *	990 - 1,080	1,000 - 1,150

* Prices include temporary surcharges of up to 30 €/t.

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The higher fine paper prices unveiled this spring are now considered to be firmly established on the Italian market. Insiders told EUWID that the increases of €40-50/t for woodfree uncoated paper and €50-60/t for woodfree coated grades have now been pushed through across most segments, describing the first round of hikes as successful.

By contrast, manufacturers' attempts to secure additional hikes have met with limited success. Market players said that the additional mark-ups planned for June failed to gain traction both in terms of magnitude and market coverage. While a few paper producers are now weighing up whether to drop further price hikes and focus on cementing the first mark-ups, others are sticking to their plans and now shifting their sights to July deliveries. They point to long lead times of five weeks and more, which they said did not allow them to implement another price increase any earlier. These manufacturers stated that their declared aim was to tack on another €20-30/t in July.

In the meantime, demand for fine paper has cooled in June. Many customers had stocked up in advance of the latest mark-ups and have been limiting their orders to short-term needs for weeks now. Accordingly, manufacturers are reporting dwindling order intake and receding machine utilisation rates. One buyer noted that strategic purchasing had artificially propped up demand in recent months and, in the context of rising energy and fibre costs, had helped make the price increases stick. He added that the market has now entered a phase of clear buying reluctance.

At the same time, the availability of imports from Asia has improved in the woodfree uncoated paper business. Several delayed shipments had arrived in June and had increased supply noticeably, one merchant told EUWID. Prices for Asian imports remain low in Italy and are much lower than those offered by European producers. Copy paper and offset paper suppliers from Asia and South America had been involved in the spring price talks and thus helped to stabilise the market in general. That being said, price hikes were more moderate and took hold on varying dates. As a result, customers still have access to relatively cheap paper, resulting in stronger competition in the uncoated paper segment in June, one paper manufacturer noted.

Within Europe, too, competition among paper manufacturers has intensified. With demand cooling, market players are reporting that a few suppliers are proving more flexible and are describing fiercer competition for large orders. One merchant told EUWID that manufacturers were working to defend market share amid dwindling demand, which was making it even harder to implement additional hikes.

Attention in Italy has now also turned to a handful of customers with six-month contracts that have so far been shielded from the April and May increases. Market players are asking whether mills will hold their line and push for price rises with these customers on a par with those imposed on other customers.

A quiet June for the publication paper market

The Italian newsprint market remained largely quiet in the month of June. After raising their prices in April and May, suppliers swiftly turned their attention to the next round of price rises for deliveries from July onwards. After some back and forth, with a few manufacturers causing a lack of understanding among customers with their initial demands for increases of €50/t or more, market players now appear to have broadly agreed on small mark-ups, similar in scale to those seen in the second quarter.

Newsprint producers are generally still reporting healthy order books as the market moves into the second half of the year. Insiders told EUWID that the industry reaped the rewards of decent demand between March and May. The absence of Canadian suppliers and the uncertain outlook for a Spanish newsprint producer after it filed for insolvency at the end of April have reportedly drummed up additional orders for European manufacturers, leaving them with sufficient order cushions in June, insiders said.

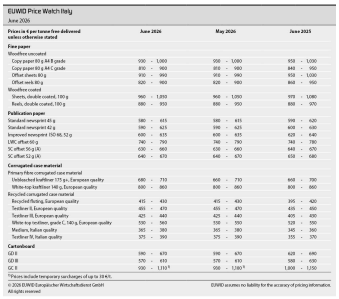
One manufacturer stressed that healthy order books also reflect the current supply structure. After a number of closures in recent years, newsprint production has been concentrated on fewer machines, enabling producers to balance volumes more effectively even in weaker market conditions, he said. Without these capacity adjustments, newsprint producers would have struggled even more to adapt to the continued decline in demand and the changing needs of publishing and printing customers, a printer argued.

From manufacturers' standpoint, the magazine paper market is less robust. Demand is falling more sharply than for newsprint, and paper mills are still struggling to ensure a satisfactory level of capacity utilisation on their machines. The situation is said to be especially difficult for SC-B because this grade competes directly with newsprint. Coated magazine paper grades are also affected, with suppliers of lower-quality LWC grades especially reportedly having to make price concessions. In a conversation with EUWID, one manufacturer stressed that customers searching for suitable paper often ultimately switched to high-quality SC paper grades which are still cheaper in price.

The knock-on effects are already evident in the latest negotiations for deliveries from July onwards. Sources pointed out that magazine paper manufacturers have not always succeeded in pushing through higher prices for third-quarter deliveries in Italy.

Commercial printers and publishing buyers appear to have come to terms with the current developments in publication paper markets. Given the recent increases in costs faced by paper mills – including fibre, energy and, above all, logistics – some adjustment in paper purchasing prices had been unavoidable, one printer said. The price increases implemented so far are regarded as "manageable" and "bearable". A publishing buyer added that the paper industry had done well not to push its pricing demands too far, pointing to rising production costs in the printing and publishing sectors as well.

Corrugated case material prices tread water in the month of June



EUWID Price Watch Italy
June 2026

Prices in € per tonne free delivered unless otherwise stated	June 2026	May 2026	June 2025
Fine paper			
Woodfree uncoated			
Copy paper 80 g A4 B grade	930 - 1,000	930 - 1,000	930 - 1,000
Copy paper 80 g A4 C grade	810 - 960	810 - 960	840 - 950
Offset sheets 80 g	910 - 990	910 - 990	930 - 1,000
Offset reels 80 g	920 - 960	920 - 980	960 - 990
Woodfree coated			
Sheets, double coated, 130 g	960 - 1,010	960 - 1,010	970 - 1,080
Reels, double coated, 100 g	880 - 950	880 - 950	880 - 970
Publication paper			
Standard newsprint 45 g	580 - 615	580 - 615	590 - 620
Standard newsprint 42 g	590 - 625	590 - 625	600 - 630
Improved newsprint 1 ISO 48, 52 g	600 - 635	600 - 635	620 - 640
LWC offset 60 g	740 - 790	740 - 790	740 - 780
SC offset 50 g IG	630 - 660	630 - 660	640 - 670
SC offset 52 g UK	640 - 670	640 - 670	650 - 680
Corrugated case material			
Primary fibre corrugated case material			
Unbleached kraftliner 175 g.m, European quality	680 - 710	660 - 710	860 - 700
White-top kraftliner 140 g, European quality	800 - 860	800 - 860	800 - 860
Recycled corrugated case material			
Recycled fluting, European quality	415 - 430	415 - 430	395 - 420
Testliner II, European quality	455 - 470	455 - 470	435 - 460
Testliner III, European quality	425 - 440	425 - 440	405 - 430
White-top testliner, grade C, 140 g, European quality	530 - 560	530 - 560	520 - 550
Medium, Italian quality	365 - 380	365 - 380	345 - 360
Testliner III, Italian quality	375 - 390	375 - 390	355 - 370
Cartonboard			
GD II	590 - 670	590 - 670	620 - 690
GD III	570 - 690	570 - 690	590 - 650
GC II	930 - 1,010 [1]	930 - 1,060 [1]	1,000 - 1,150

[1] Prices include temporary surcharges of up to 10 €/t.

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All is calm on Italy's recycled corrugated case material market at the moment. For some market players, it's uncomfortably quiet. Even though June and July are the strongest times of year, sources in the corrugated board industry are repeatedly mentioning inadequate capacity utilisation and shift cancellations. On the other hand, paper production continues unabated, resulting in ongoing ample availability of recycled grades.

Following price hikes for recycled corrugated case material in April and May – totalling €70-80/t for brown grades and about €40/t for white-top testliner – prices for deliveries in June did not change. A few manufacturers' attempt to raise prices for June deliveries by up to €60/t was swiftly dropped in Italy. One supplier said the announcements came too late and were too limited in scope. One converter stressed that the initiative had not been followed through in a sufficiently consistent manner.

Price talks on Italy's recycled corrugated case material market are now centred on July deliveries. Based on the information available to date, the chances of successfully raising prices over the summer months look to be fairly limited. There is still not enough critical mass in place to apply real pressure on customers, one paper manufacturer remarked.

Many corrugated board producers are refusing to accept any additional price increases for recycled corrugated case material on cost grounds. So far, the corrugated board industry has been able to pass on only a small fraction of the real hike in paper and auxiliary materials to the customers. With demand lacklustre and competition fierce, especially in the sheet business, the industry continues to struggle with implementing its plans. In a bid to ease cost pressure, a few converters are therefore said to be going the other way and already requesting price cuts for purchasing paper, several buyers and sellers told EUWID.

A few corrugated board and packaging manufacturers are taking a more cautious approach and are reluctant to put too much pressure on paper prices. One insider remarked that any reduction in paper prices would mean that the corrugated board industry would no longer be able to increase prices for corrugated board and packaging in talks for the third quarter and the second half of the year.

Kraftliner suppliers active in Italy said that they were in a better position, especially those making brown kraftliner. On the demand side, companies can count on seasonal orders from the fruit and vegetable sector. At the same time, supply has tightened, with several factors curbing availability. Market players underscored technical and maintenance downtime in Europe, lower imports from the US and delayed arrivals from Brazil as the key drivers of the present shortfall in kraftliner supply in Italy.

Kraftliner suppliers are keen to capitalise on this situation. After raising prices by €60/t for brown grades and €40/t for white-top kraftliner in the second quarter, several European manufacturers informed their customers of plans to tack on up to €80/t from the middle of June or the start of July.

As EUWID researched this report in mid-June, talks about kraftliner prices had not made much progress in Italy. The paper industry's customers are pushing back against any additional hike and have refused a mid-month adjustment. They stress that demand for kraftliner was solid but ultimately not especially exceptional, and that the current demand situation did not justify manufacturers' plans. One converter commented that, without today's supply tightness, producers would not dare to launch another round of increases.

A more substantial hike for brown and white-top kraftliner, of the kind that seems to be feasible in other European markets at present, might thus be harder to push through in Italy even for July. Instead, a few manufacturers said that they were once again looking at the option of several smaller price increases staggered over time.

In Italy, producers of semi-chemical (SC) fluting managed to institute hikes in May or June totalling €30-40/t. Semi-chemical fluting is also part and parcel of the latest round of hikes for primary fibre-based containerboard, although converters see little room for more significant hikes over the summer in the current market climate.

Strong competition affecting talks about cartonboard prices

Business conditions for suppliers active in Italy's folding boxboard (FBB/GC) market have hardly improved in June. Despite sluggish demand, GC manufacturers are, for the most part, maintaining the cost-driven special surcharges introduced in May and have extended them for June shipments, too.

Nonetheless, market players are reporting intense supply and price competition on the GC board market in Italy. As is well known, additional production capacity in Europe is coinciding with cheap imports from Asia, with a lot of cartonboard in circulation as a result.

EUWID sources also underscored lasting changes to Italy's cartonboard market. Chinese cartonboard has become a firm feature of the market over the years. A few insiders are now telling EUWID that a first sheeting centre and a first folding carton plant with Chinese owners are now operating in Italy.

Against this background, however, an unusually calm situation was observed in June. Unlike in years past, discussions on price arrangements for deliveries in July had scarcely taken place by mid-June, several insiders noted. Several GC producers told EUWID that they would like to incorporate the temporary surcharges into their list prices. In the view of buyers, neither the current demand situation nor the expected easing in energy and raw material costs supported lasting consolidation of higher prices implemented to date. Under the prevailing market conditions, additional price rises are even more difficult to justify, explained one folding carton manufacturer.

In the white-lined chipboard (WLC/GD) segment, too, the majority of market players surveyed by EUWID continued to describe demand as largely unsatisfactory. While a few board producers still report generally good capacity utilisation at their mills, the trend in new orders has clearly been downward since around the end of April, and fresh gaps have opened up in their order books. In this environment, the availability of GD board on the Italian market remains consistently high, with competition intensifying as a result.

In light of this situation, the first insiders on both sides of the market are already reporting a gradual scaling back of previous price hikes to just €20/t or €25/t. A few buyers are now even raising fundamental questions about the hikes instituted in the spring.

In the run-up to negotiations for deliveries from July onwards, producers thus appeared to be taking a more differentiated approach. Market players said that a few suppliers were giving precedence to strategic customers and granting them preferential treatment. However, not all recycled board manufacturers had the same room for manoeuvre. While some suppliers, supported by a more favourable cost position at their mills, can focus more on volumes and maintaining operating rates, others are forced to prioritise price over volume and cannot afford to accept every order.

US Exports of Unbleached Kraftliner

in tonnes	April		January - April		January - April
	2026	2025	2026	2025	2026/2025
China	20,345	25,909	91,676	107,448	- 15 %
France	304	386	304	1,572	- 81 %
Germany	284	2	7,450	807	+ 823 %
Italy	5,959	31,141	45,204	73,967	- 39 %
Spain	1,913	13,334	6,909	40,365	- 83 %
Turkey	1,747	2,488	8,067	15,875	- 49 %
UK	1,827	3,702	14,289	6,725	+ 113 %

Source: US Census Bureau

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DIWASS fuels renewed debate over end-of-waste status for recovered paper

Germany and Austria pursue national solutions

EUWID + 24 June 2026 | Frauke Schmidt | ~ 6 min | Published in issue 26/2026



The debate over introducing end-of-waste (EoW) status for recovered paper is gaining momentum in Europe once again. One of the main drivers is the revised European Waste Shipment Regulation (WSR) and the roll out of the digital platform DIWASS. Many market participants see the new documentation and reporting requirements under the WSR as a reason to reassess whether recovered paper should continue to be classified as waste.

Representatives of both the waste management sector and the paper industry in Germany confirmed to EUWID that discussions are currently under way on possible EoW criteria. One of the main hurdles remains the paper industry's insistence on procedures that ensure and document recovered paper quality. Martin Drews, Managing Director of industry association Die Papierindustrie, told EUWID: "One important aspect will certainly be to define a process that ensures genuine (certified) quality assurance and thereby demonstrates compliance with the requirements of DIN EN 643." Market participants also confirmed that both sides now appear more willing to compromise on certain issues than during previous discussions.

Representatives of the waste management industry argue that recovered paper is already traded according to clearly defined quality standards. Andreas Otto of German recycling association Bvse told EUWID: "Recovered paper is used as a raw material and is therefore a product, although in most cases it remains subject to waste legislation." As with any other product, paper manufacturers can already reject recovered paper deliveries that fail to meet agreed quality standards and claim price reductions, regardless of whether an EoW regime exists.

Austria: Waste management and paper industries submit draft EoW regulation

While Germany is still discussing possible criteria, Austria has already taken the next step. Following the failure of earlier attempts to establish EU-wide rules, the Austrian Paper Industry Association (Austropapier) and the Association of Austrian Waste Management Companies (VOEB) jointly prepared a draft national end-of-waste regulation and submitted it to the responsible federal ministry at the end of 2025.

The joint proposal includes an externally audited quality management system which is intended to ensure that the defined quality criteria are consistently met and documented.

Prinzhorn Group calls for EU-wide harmonisation

Despite the progress made in Austria, Prinzhorn Group continues to advocate a harmonised European approach. The company, which has been involved both in drafting the Austrian proposal and in the current discussions in Germany, called in early June for a fresh assessment of EU-wide EoW status for recovered paper.

According to Stefan Riepl, Executive Director Business Development at Hamburger Recycling Group, the introduction of the DIWASS digital waste shipment platform has been a key catalyst for the renewed debate. For companies with operations across Europe, such as Prinzhorn, the new documentation and monitoring requirements have exposed both the scale of the administrative burden and the wide variation in how the rules are being enforced across member states. Mr Riepl told EUWID that while DIWASS is, generally speaking, a useful tool for waste streams that require close supervision, recovered paper should not fall into that category. Rather than strengthening the circular economy, the additional administrative burden creates obstacles for paper recycling. Prinzhorn supports allowing recovered paper grades covered by Groups 1 to 4 of DIN EN 643 to qualify for product status, provided that appropriate quality assurance systems are in place.

Mr Riepl added that Italy's experience shows that EoW status does not necessarily reduce recycling rates or compromise material quality. Instead, a harmonised European framework could help remove administrative barriers and strengthen the internal market.

Recycling Europe promotes EU-wide EoW rules

The debate also received new momentum at European level at the end of April, when industry association Recycling Europe called on EU Environment Commissioner Jessika Roswall to introduce harmonised European end-of-waste criteria for recovered paper.

According to Recycling Europe, the current mix of national EoW regulations, differing interpretations of the WSR and varying administrative procedures creates legal uncertainty, increases costs and hampers trade within the internal market.

Julia Ettinger, Secretary General of Recycling Europe, told EUWID that the initiative had not been driven directly by DIWASS. Instead, it was prompted by the forthcoming discussions surrounding the European Commission's planned Circular Economy Act. In the association's view, recovered paper is one of the materials for which harmonised European rules could be introduced comparatively easily, since DIN EN 643 already provides a well-established quality standard.

CEPI: EoW only for separately collected recovered paper

Although the European paper industry was not involved in Recycling Europe's initiative, it broadly supports the introduction of EoW criteria, provided that key conditions are met. Ulrich Leberle, Director Raw Materials at CEPI, told EUWID that recovered paper must meet clearly defined quality requirements and that EoW status must not simply become a case of "re-labelling" waste.

The European Paper for Recycling specification EN 643 for grades 1 to 4 provides a good starting point, Mr Leberle said. However, some form of quality monitoring system would be required to verify and document compliance with the established criteria.

Recovered paper quality varies considerably across Europe, since some countries operate source-separate collection systems while others rely on commingled household waste collections. In CEPI's view, only separately-collected material should be eligible for EoW status.

Paper industry warns of unintended export incentives

Mr Leberle also pointed out that within the EU, EoW status is only recognised if both the country of dispatch and the country of destination have introduced corresponding rules. For exports to third countries, by contrast, recognition in the exporting country is generally sufficient. As a result, it could, under certain circumstances, become easier to export recovered paper from Italy, where EoW for recovered paper already exist, to overseas markets than to supply paper mills in EU Member States without EoW rules legislation. In Mr Leberle's view, this issue could ultimately only be addressed through a harmonised EU-wide solution.

Moreover, paper manufacturers are concerned that large volumes of recovered paper could be exported to recycling facilities with lower quality requirements outside the EU. While the revised EU Waste Shipment Regulation is intended to ensure that waste continues to be channelled primarily into high-quality recycling operations, it remains to be seen how the rules will be implemented in practice. From 21 May 2027, receiving facilities in non-OECD countries must be audited to prove that they meet the EU's requirements for environmentally sound waste management.

Waste management sector: Exports remain an important outlet

Andreas Otto of Bvse, meanwhile, does not expect that end-of-waste status would lead to a significant increase in exports of European recovered paper to overseas markets. Exports primarily serve as an outlet for surplus volumes that cannot be processed within Europe. According to the umbrella association of European paper industries CEPI, net recovered paper exports have remained stable at 5 to 6 million tpy. Since recovered paper can only be stored for a limited period of time, exports play an important role in ensuring that the material continues to be recycled.

Quality requirements for recovered paper imports have also tightened across much of Asia. Since China introduced its complete ban on recovered paper imports in 2018, a growing number of countries, including Indonesia, Malaysia and Vietnam, have introduced increasingly stringent import specifications for recovered paper.

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Decision on future of Fibre Excellence postponed, management withdraws takeover offer

EUWID + 24 June 2026 | Valeria Buß | ~ 2 min | Published in issue 26/2026



The commercial court of Toulouse in France has postponed its decision on the future of insolvent pulp producer Fibre Excellence to 6 July. The ruling had originally been scheduled for 17 June and was to determine whether the observation period would be extended or liquidation ordered. Fibre Excellence also announced that the management, which had submitted a takeover offer for the company and its two pulp mills Saint-Gaudens and Provence, has withdrawn its offer.

“The strong demands expressed by the state and various stakeholders for a new governance structure have led me to withdraw the takeover bid that I was pursuing together with the management“, said Jean-François Guillot, President of Fibre Excellence. The company is currently owned by Indonesian entrepreneur Jackson Wijaya.

Originally, the postponement of the hearing at the commercial court was intended to provide additional time to resolve the outstanding conditions attached to the offer by the management. Now a new investor, which had recently expressed interest in becoming involved, is set to step in. Fibre Excellence said it would leave it to the new investor to pursue a robust industrial and financial project. According to several French media reports, the investor is French investment banker Matthieu Pigasse. Fibre Excellence said the deadline for submitting a takeover bid is 2 July.

Fibre Excellence has been in financial difficulties for several months and has been under receivership since 27 April 2026. The company had previously held extensive talks with the French state in an effort to find a potential rescue solution. The fate of the company, which is the only remaining producer of market pulp for the paper industry in France, has attracted nationwide interest in both political and public debate.

Fibre Excellence operates two mills employing a total of around 500 people. The Saint-Gaudens mill can produce up to 280,000 tpy of bleached softwood and hardwood kraft pulp, while the Provence mill in Tarascon has a capacity of 220,000 tpy of unbleached softwood pulp.

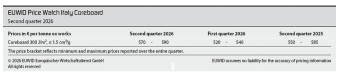
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Cores and coreboard prices in Italy rise in the second quarter

EUWID + 23 June 2026 | Valeria Buß | ~ 4 min | Published in issue 26/2026


EUWID Price Watch Italy Coreboard
Second quarter 2026

Prices in €/t ex works	Second quarter 2026	First quarter 2026	Second quarter 2025
Coreboard 300 J/m², ≤ 1.5 cm³/g	570 - 590	520 - 540	550 - 585

The price bracket reflects minimum and maximum prices reported over the entire quarter.

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After a stable start to 2026, there was some movement on the Italian coreboard market in the second quarter.
Although the demand situation was broadly unchanged, prices increased. Producers had announced price hikes in March and these were implemented fairly quickly. Cores producers were also able to adjust their sales prices and thus pass along the additional cost to their customers.

Following the outbreak of the Iran war, coreboard producers in Italy informed their customers in March of a price increase, citing rising costs. Sellers stressed this was not only because of energy, which has become more expensive since the start of the Middle East conflict. Energy prices had at least stabilised at a higher level in recent weeks, they said. But other costs have also risen, including for transport, chemicals, packaging material and personnel. Numerous respondents pointed to the signing of a new national collective bargaining agreement for paper industry employees in February. This had been the first update to the agreement since 2021, so wages had now risen considerably, noted one respondent. According to the union SLC Cgil, minimum wage levels have risen by nearly 15 per cent.

In March, coreboard producers announced hikes of between €50-100 as of April. In the end, the actual figures implemented in the market were around €50/t, with some outliers above and below this level. In many cases, this price adjustment occurred as a single step in April, but some split the implementation into two steps in April and May. In June, there were no further price changes.

Consequently, the second-quarter price bracket for coreboard with a ply-bond strength of 300 J/m² and á bulk of up to 1.5 cm³/g stood at €570-590/t ex works.

Since the higher energy costs provided a clear-cut argument, coreboard producers did not have much difficulty implementing their hikes. Yet they were not always able to achieve the full targeted amount. Some market participants said this was because some coreboard manufacturers were always trying to gain orders via price, so this prevented higher mark-ups in the market.

As a result, some coreboard producers opined that the current price increase is insufficient. But industry players agreed that the minimum objective was achieved and the additional costs have at least been covered. However, a further price step would be necessary in order to improve margins, EUWID was told.

Market participants doubt that such a move will happen in July. If the status quo changed and energy costs rose further, this would of course affect the underlying market conditions, players noted. But assuming costs hold steady, most of the suppliers and customers surveyed in the second week of June expect that coreboard prices will be stable in the coming month. At the time of the EUWID market survey, producers were not planning to announce further price increases.

Softening demand from mid-May onwards

One reason for this hesitance is that the current demand situation does not support higher prices. As many players point out, the most recent price round was purely cost-driven. Suppliers and customers alike said that order intake was not bad, especially at the beginning of the quarter. However, many also reported the typical effect of customers slightly boosting their inventory levels and purchasing more in advance of price increases. Consequently, demand for coreboard was quite good in April. Then in May or by June at the latest, demand tapered off again. For July, which is traditionally a somewhat livelier month, producers do not have any big expectations.

Despite lacklustre consumer sentiment, there were barely any production downtimes during the second quarter, according to market participants. Last year, idling at coreboard factories had become a normal practice and many mills were regularly halting production for a few days a month. So far this year, such measures have become rarer, market insiders say. A few respondents suspect that this might be partially explained by the fact that a key coreboard mill has still not returned to full production following major rebuilding work.

Cores producers pass on higher raw material costs to their customers

Cores producers in Italy described their situation as similar to that of coreboard. In April, customers had slightly ramped up cores purchases in anticipation of price hikes, they said. But from May onwards, demand weakened noticeably. The month of July might be slightly brisker due to scheduled production downtimes in August, cores producers say, but they do not expect any major demand drivers.

Nevertheless, cores producers said they were quite satisfied with the development of the second quarter. They were able to pass along higher prices for coreboard to their customers rather quickly in some cases. Some prices were already adjusted as of May, while the remainder are still being implemented, said one major producer. The mark-up achieved for cores is reportedly even somewhat larger than the cost increase for coreboard. However, margins had improved only minimally or not at all, cores producers unanimously agreed. They pointed out that coreboard is not the only cost factor: All other costs – including personnel, adhesives, packaging and transport – had also risen.

Producers of both cores and coreboard in Italy therefore generally see some upward potential when it comes to sales prices and margins. In the second quarter, they were at least able to achieve their minimum targets and maintain the profitability of their production.

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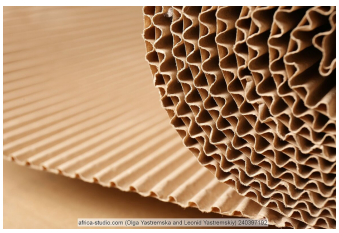
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Grembox starts building new corrugated board packaging plant in Poland

19 June 2026 | ~ 2 min | Published in issue 26/2026

Polish packaging producer Grembox has started building its new corrugated board packaging plant in Bytom in southern Poland. The company is investing more than PLN110m (around €26m) in the plant located within the Katowice Special Economic Zone (KSSE).



The new plant is being built on a site measuring around 4.6 ha. Current plans provide for a production and warehouse building with an area of around 11,000 m^2, along with office space and staff facilities. Mateusz Bochenek, CEO of Grembox, said that construction was scheduled to be completed in the course of next year so that commissioning could take place by the end of 2027. He added that the new plant is primarily intended to support the company's e-commerce business operations. Grembox claims to operate Poland's largest online shop for packaging and decided to increase its production capacities especially to serve this distribution channel.

The plant is to manufacture corrugated board packaging made from purchased corrugated board. Grembox has no plans to install a corrugator of its own. The plant's annual production capacity is to total between 40 million and 50 million m^2 of corrugated board packaging and the site is expected to employ 70 to 80 people. The investment project receives funding under the EU's FENG programme.

Grembox acquired the site within the KSSE as early as 2024. According to its plans at that time, the project was to be put into practice in two stages. The first stage envisaged building a production plant for corrugated board packaging, while the company planned the expansion of its warehousing capacities and the integration of its manufacturing and e-commerce activities at a single facility in a second stage. Bytom was thus set to become one of the largest packaging centres in Poland serving the e-commerce sector.

Grembox is a Polish family-run company headquartered in Ruda Śląska. To date the company has sold its packaging output primarily to customers within Poland including companies from the e-commerce sector and from the food, cosmetics, manufacturing, construction and household chemicals industries.

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UPM adjusts Finnish pulp output amid market and cost pressures

18 June 2026 | ~ 1 min | Published in issue 26/2026

Finnish forest products group UPM has announced temporary production curtailments at its pulp mills in Kaukas and, potentially, Pietarsaari.



Production at the Kaukas mill is scheduled to be suspended for approximately six weeks from 3 August. UPM is also preparing for a possible temporary production stoppage at its Pietarsaari mill in October.

The company said the measures are aimed at optimising production volumes and wood procurement. The curtailments are also intended to safeguard profitability under current market and cost conditions.

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Stora Enso to shut NBSK line at Skutskär and invest €19m in fluff pulp expansion

17 June 2026 | ~ 2 min | Published in issue 26/2026

Stora Enso shifts Skutskär focus from NBSK to fluff pulp.



Stora Enso has concluded negotiations on the planned closure of a softwood pulp production line at its Skutskär mill in Sweden. Production on NBSK Line 3 (L3) is scheduled to cease in the third quarter of 2026, as previously announced, subject to the fulfilment of existing customer orders.

According to earlier company information, the affected production line has a capacity of 100,000 tpy of northern bleached softwood kraft (NBSK) pulp. Stora Enso announced the closure at the end of May, citing declining demand for softwood pulp in Europe since 2023, lower price levels and rising wood costs.

“Market conditions did not support a viable path for the future of L3. This investment sharpens our focus on fluff and the work to restructure the organisation accordingly continues. We are positioning Skutskär strategically for long-term competitiveness in the expanding fluff market,” says Timo Tidenberg, Head of Stora Enso’s Business Unit Skutskär.

Fluff pulp capacity to increase by 10 per cent

At the same time, the group has announced a €19 million investment to expand fluff pulp production at the same site. The project is expected to increase capacity by around ten per cent, improve production stability and efficiency, enhance product quality and enable future fibre blend developments. The upgrade is scheduled for completion in the fourth quarter of 2027.

Following the expansion, Skutskär will have an annual fluff pulp production capacity of 440,000 tpy. The mill currently produces both fluff pulp and NBSK pulp and has a total pulp production capacity of 515,000 tpy.

“This is an important step for Stora Enso. Fluff pulp usage is growing, based on aging population across the globe and increased usage of hygiene products and with demand expected to outgrow supply over time. In line with our strategy, we are shaping our business for accelerated growth and value creation by serving demanding customers,” says Johanna Hagelberg, Executive Vice President, Biomaterials Business Area at Stora Enso.

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