

Mondi divests Kaierde board mill in Germany

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A few weeks after concluding its takeover of Schumacher Packaging, Mondi is selling the Kaierde board factory in Germany to minority shareholders Stephan Gravenkamp and Wolfgang Schmitz, EUWID has learnt. The involved parties did not disclose any financial details of the transaction.

Kartonfabrik Kaierde, a producer of unlined chipboard and brown cartonboard, was acquired by Schumacher Packaging in early 2022 and was then transferred to Mondi as part of the take-over of the parent group. Before the company was sold to Schumacher Packaging in 2022, the Gravenkamp family and Wolfgang Schmitz have held a majority stake in Kaierde and Stephan Gravenkamp has also been serving as the company's CEO since 2019.

With a capacity of around 25,000 t, Kartonfabrik Kaierde produces unlined chipboard and brown recycled board with basis weights of 300-900 g/m². Mondi will reportedly continue to source some board from Kaierde.

Pixelle to close Chillicothe mill

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The US specialty paper manufacturer Pixelle Specialty Solutions, Spring Grove, a H.I.G. Capital company, will close its Chillicothe plant in the US state of Ohio after all. According to the company, production at the specialty paper plant in Chillicothe will be discontinued by 10 August. Employees and authorities have already been informed.

Pixelle had already announced in April that, as part of an effort to align its operational footprint with long-term business objectives, it intended to close the Chillicothe site in order to strengthen its remaining operations in Spring Grove and Fremont and maintain its competitive position in the specialty paper market.

A few days later, the mill's closure was put on hold until the end of the year to allow time for discussions with the Ohio government to find alternative solutions for the site. However, no "viable path forward" or alternative to closing the site could be found. What is more, staffing levels and customer demand have declined so sharply in recent weeks that further delays are no longer possible, Pixelle said in its latest announcement in June.

Pixelle continues to explore all viable sale opportunities for the plant but is preparing to proceed with decommissioning the plant if no qualified buyer is found, the company added.

Norway upholds permit refusal for Billerud Viken BCTMP mill

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The Norwegian Environment Agency (Norska Miljødirektoratet) has uphold its refusal of permit for the construction of a new fibre line for the production of 300,000 tpy of bleached chemi-thermomechanical pulp (BCTMP) at the Follum site near Hønefoss. The application submitted by Billerud Viken AS, a joint venture between Swedish pulp and packaging paper manufacturer Billerud, and Norwegian forest owner association Viken Skog has been rejected once again.

As in its initial decision in September last year, the Environmental Protection Agency maintains that the discharges and emissions from the proposed pulp mill would violate both the EU Water Framework Directive and the Norwegian Water Regulations.

Fabryka Papieru i Tektury Beskidy orders new TM

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Valmet has received an order from Polish paper producer Fabryka Papieru i Tektury Beskidy for the supply of a new tissue production line to be installed at the company's site in Wadowice, southern Poland. The new Intelli Tissue 1600 machine (TM 5) is designed to combine low energy and gas consumption with high operational performance. The machine is scheduled to start operation in 2026.

Valmet's delivery includes a complete tissue production line featuring a 16-foot Yankee dryer and IntelliCap design, which enables high daily output while minimising media use. The scope also comprises stock preparation systems, offering the customer a full-package solution.

Fabryka Papieru i Tektury Beskidy was founded in 1907 and exports its high-absorbency and wet-strength tissue products to more than 20 countries. The company is engaged in ongoing R&D and focuses on comfort and cost-effectiveness for its customers.

Sofidel completes purchase of certain Royal Paper assets

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Italy-based tissue paper and products group Sofidel has completed the acquisition of certain assets of US based company Royal Paper. The transaction, which was based on a stalking horse asset purchase agreement (APA) signed in April 2025, was finalised on 16 June, after all court and regulatory approvals had been granted.

As part of the acquisition, Sofidel is taking over four production facilities – a paper mill in Gila Bend, Arizona, with a capacity of 61,000 tpy of tissue, as well as two converting plants in Phoenix, Arizona, and an additional converting line in Duncan, South Carolina.

With this acquisition, Sofidel is further strengthening its footprint in the market in North America. The company now operates a total of 15 production facilities in the US and the North American market now accounts for 50 per cent of the group's total revenue, Sofidel said. And its share can be expected to increase even further following the completion of the paper mill project in Circleville, Ohio, and the investment in converting and warehousing capacity at the Duluth site in Minnesota.

In the fiscal year 2024, the Italian tissue group generated €3.2bn in sales revenues. The group has 9.000 employees and produces up to 1.8 million tpy of paper.

Napkin producer Fasana files for insolvency after hacker attack paralyzes production

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Germany-based paper napkin producer Fasana has had to file for insolvency as a result of damages caused by a hacker attack at the end of May. The local court in Bonn appointed Dr. Dirk Wegener as the preliminary insolvency administrator. Dr Wegener told EUWID that the suspected hackers infiltrated the company's computer systems on 21 May 2025 and disabled technology needed for production. Order processing and accounting were temporarily impossible. The resulting production outages created financial problems for Fasana, forcing the company to file for insolvency at the Bonn local court on 2 June 2025.

Initially, the company had been able to continue producing existing orders, but it was unable to enter new orders into the system or process them, according to the insolvency administrator. Bringing the machines back into operation was a prolonged process and the company could only resume full operations a few days ago, he informed.

The insolvency administrator estimates the resulting damages are in the seven-digit euro range, resulting primarily from the stopped production, which normally would have generated daily revenues of €150,000.

It is planned that the company will continue operations. The search is now on to find an investor prepared to take over production and staff, according to the insolvency administrator. Fasana currently has around 250 employees.

At its factory in Stotzheim near Euskirchen, Fasana operates a paper machine with a production capacity of approximately 20,000 tpy of tissue as well as 15 converting lines to produce printed and unprinted paper serviettes.

The factory was part of Metsä Tissue until 2020, when it was sold to Keeper Group, a subsidiary of the German investment firm Mutares SE & Co. KGaA. In March 2025, the serviette producer was acquired by Powerparc AG, which is owned by the Germany-based advisory and investment firm PVM Private Values Media AG.

Russia's APPM to build new RCCM machine

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Russian Arkhangelsk Pulp and Paper Mill (APPM) is forging ahead with one of its megaprojects. As reported at the beginning of this year, the company plans to build a new paper mill for recycled corrugated case material (RCCM).

APPM and the governor of Moscow region have now signed a formal agreement to implement the project in the special economic zone near the city of Kashira.

The project involves investments to the tune of RUB23bn (€255m). The new paper mill, a dedicated subsidiary founded for the purpose, will create around 250 new jobs and will be operated by Arkhbum Liner, APPM says. The new recycled containerboard PM will be rated to produce up to 325,000 tpy and come online by the end of 2028. The mill's output will cater to the Russian inland market, it is learnt.

By expanding capacity for recycled containerboard, APPM aims to increase the share of secondary raw materials in production in keeping with the principles of a circular economy. This will enable the group to fulfil requirements set by the Russian government for extended manufacturer's responsibility to recycle packaging.

IP plans closures and shift reductions at UK DS Smith sites

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International Paper has launched a broader restructuring initiative in the UK involving the closure of five former DS Smith packaging sites. The proposal includes one box plant in Clay Cross and four sheet plants located in Plymouth, Newcastle, Sheerness and Wellingborough, a company spokesperson told EUWID.

In addition, the company intends to relocate operations from its Milton Keynes facility and reduce shifts from 24/7 to 24/5 at its Burscough site. Minor headcount reductions are also planned at Redditch and Launceston, the spokesperson added.

The company did not provide specific closure dates or confirm the number of jobs that will be affected, noting that the consultation process is still underway.

“Until this process has concluded, we cannot confirm how many jobs will be affected,” the company spokesperson told EUWID.

The developments come as the company seeks to adapt to shifting market demands and cost pressures, with a focus on streamlining operations and reinforcing its competitive positions in a challenging economic environment.

Boxes and Packaging to close Leicester site

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The Logson Group has announced plans to close its Boxes and Packaging (Leicester) Ltd. site, launching a consultation process with affected staff in May. According to CEO David Richardson, the decision is part of a broader strategy to strengthen operational efficiency across the group and maintain high service standards for customers.

“This is a strategic decision to ensure Boxes and Packaging, as a group, continues to be operationally efficient and deliver the best service and products to its customers,” Mr Richardson said in a statement.

While no concrete timeline for the closure has been disclosed, the company stressed that it has comprehensive plans in place to ensure uninterrupted supply for customers during the transition.

The group also emphasised its commitment to supporting affected employees, stating that every effort will be made to offer them alternative roles within the Logson Group.

Boxes and Packaging operates multiple sites across the UK and is part of the Logson Group, one of the country’s leading independent corrugated packaging businesses.

Production at Progroup's Ellesmere Port site not impacted by Krystals' insolvency

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The insolvency of British packaging manufacturer Krystals has not yet had any operational consequences for Progroup, the German corrugated board manufacturer, at its Ellesmere Port site. The company informed EUWID that operations at the PW 12 plant are continuing as normal. According to a company spokesperson, production has not had to be adjusted or suspended in the meantime.

Progroup has operated a corrugator with an annual capacity of 235,000 tpy in Ellesmere Port since the beginning of 2019. Krystals, a family-run company based in Lincoln, was the main partner in the integrated packaging park. It had built its own special packaging production facility on the neighbouring site, which was directly connected to the Progroup plant via a conveyor bridge. The Krystals plant began operating in October 2020. However, on 23 May 2025, Krystals was placed under insolvency administration.

Progroup emphasises that every location decision made by the company is based on a broad customer base. While the packaging park enables fast and cost-effective delivery to partners, Progroup's plants also supply other customers to ensure balanced capacity utilisation at all times.

The Progroup spokesperson said that demand in the British market was currently sufficient, so the volumes previously supplied to Krystals had now been taken over by other customers. Furthermore, the company does not anticipate any impact on its market strategy in the UK: "The strategy remains unchanged," the spokesperson emphasised.

Fine paper prices in Germany point down in June at the latest

Mixed outcome to talks about brown kraftliner prices

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After initial price reductions in May, prices of woodfree coated and uncoated paper slipped across the board in Germany in June. There is growing concern about additional losses in sales volumes, especially since sources have unanimously described demand as unsatisfactory in recent weeks. The mood in the printing sector remains bleak, as well. Poor business conditions, combined with high costs, are creating financial difficulties for many companies, especially since they are unable to pass these costs on to customers.

Producers' approach in the latest price round for brown kraftliner in Germany has been somewhat inconsistent. Negotiations on a second price hike in 2025 dragged on for three months, with the first converters reportedly digging deeper into their pockets as early as April. In May, a large number of companies is said to have accepted higher prices, with the remainder following suit with effect from 1 June. However, it has recently become clear that the published hike of €40/t was not fully implemented across the board. White-top kraftliner and semi-chemical fluting prices showed a sideways movement.

Fine paper prices in decline

The downward spiral in prices for coated and uncoated woodfree paper appears to have intensified in June after sellers already made more price concessions in May. An attempt to raise prices this spring has fizzled out, with the onset of an early summer lull adding further pressure. Prices for C-grade A4 copy paper, in particular, are crumbling given low-priced offers from overseas. However, nearly all fine paper commodity grades are now feeling the effects.

Market players report that there is a series of price undercutting, particularly for woodfree coated papers. Concerns about a further decline in sales volumes are palpable, especially since demand has unanimously been described as weak and unsatisfactory in recent weeks. No positive market developments have been seen, something that insiders primarily attributed to the large number of public holidays in May and June, and hardly any EUWID sources expect to see an upswing in demand with the sluggish summer period just around the corner. The structural decline in deliveries appears to be having more of an impact this year than expected.

In response, producers are repeatedly taking steps to curb their production, such as extending stoppages around public holidays or operating machines at reduced speed. Nonetheless, prices have fallen across the board in Germany, as not all competitors can afford to forgo cash flow. Buyers said that they were often able to cut prices by up to €30/t compared with the previous month. A

few buyers claimed to have secured mark-downs of up to €50 compared with April.

Sources said that a price war was primarily evident among paper merchants. Intense competition in the indent business has prompted substantial price cuts. Inventory business stayed by and large uncontested.

Sentiment in Germany's printing business is also subdued, with the outlook bleak. Print advertising continues to decline, and order volumes are shrinking. The combination of poor market conditions and high costs is pushing many companies into financial difficulties, especially since these costs can hardly be passed on to customers. Insiders are also complaining about the constant need to update price lists, with some of them nostalgic for the days of quarterly pricing, which is now a thing of the past.

Longer-term price commitments are no longer in demand. Manufacturers are reluctant to offer them because they want to stay agile so they can quickly respond to positive market developments and hope for a reversal of the current price slide. For their part, buyers are pinning their hopes on additional price cuts in the near future.

Economic researchers believe that the steps announced by the new German government, such as better depreciation options and growing government investment, will soon provide a boost for companies and counteract the effects of the trade dispute with the US. However, many printers are unable to take advantage of better depreciation options, as their current financial situation leaves no scope. Major purchases are thus not in the spotlight.

Paper mills are also grappling with slim margins in an intensely competitive environment while also facing the need to invest in energy upgrades. Observers are calling for better capacity management in the graphic paper market in Europe, noting that additional stoppages are urgently needed to compensate for declining deliveries and to stabilise the market. Surplus capacity is especially apparent in the woodfree coated paper business, where capacities exceed demand by around 1.5 million t. So far, however, there have been no reports of planned shutdowns or conversions in this segment.

Brown kraftliner prices still lacking consistency in Germany

While prices for recycled corrugated case material edged higher on the German market in May, a similar upward movement has not materialised as clearly for brown primary fibre-based grades. From the outset, there were reports that prices in Germany had been adjusted by €40/t in one fell swoop alongside those for recycled corrugated case material. Others mentioned that talks were still ongoing, with new prices set to take effect on 1 June.

In mid-June, companies are reporting price hikes of €20-30/t for brown kraftliner, falling short of the original goal of €40/t. In some cases, credit notes were reportedly issued to customers. However, kraftliner manufacturers expressed greater confidence that this price adjustment might be more stable and sustainable than those seen for recycled grades. In recent months, insiders often reported brisker demand for kraftliner, which would support this theory. Additionally, in June, there was said to be a certain "threat scenario" that global market prices could allow kraftliner to be sold elsewhere if pressure was exerted. According to EUWID sources, kraftliner manufacturers are thus positioning themselves in anticipation that falling recovered paper prices might prompt new negotiations about recycled corrugated case material prices in July – and potentially affect prices for primary fibre-based

containerboard grades.

White-top kraftliner and semi-chemical fluting prices are stable and do not appear to be on the radar at the moment. "No one is reaching out to us," remarked a few. None of the sources interviewed by EUWID reported being actively approached by manufacturers to discuss pricing.

Price turnaround for recycled containerboard in sight on the French market in June

Publication paper market discussing Q3 prices / Fine paper prices under pressure

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After the price hike for brown recycled corrugated case material in May, producers had been aiming to raise prices for white recycled grades on the French market in June, but they did not succeed. The market for recycled corrugated case material appears to be heading for a price trend reversal. Players want to renegotiate the latest hike in light of the falling recovered paper prices, which could impact July deliveries. Kraftliner became more expensive again in France in June. Quotes for cartonboard were unchanged and demand here is described as rather subdued. A second round of price hikes for GD board is mostly considered unlikely.

EUWID Price Watch France				
June 2025				
Prices in € per tonne free delivered unless otherwise stated	June 2025	May 2025	June 2024	
Fine paper				
Woodfree uncoated				
Copy paper 80 g/m² grade	950 - 1,040	950 - 1,040	1,020 - 1,110	
Copy paper 80 g/m² grade	960 - 960	960 - 1,010	960 - 1,120	
Offset news 80 g	960 - 1,070	960 - 1,070	1,040 - 1,140	
Offset news 80 g	960 - 1,050	960 - 1,050	960 - 1,100	
Woodfree coated				
Short, double coated, 100 g	960 - 1,080	960 - 1,080	1,030 - 1,130	
Short, double coated, 100 g	910 - 1,020	910 - 1,020	890 - 1,100	
Publication paper				
Standard newspaper 40 g	400 - 430	400 - 430	370 - 410	
Standard newspaper 40 g	410 - 440	410 - 440	390 - 420	
Standard newspaper 40 g, 52 g	410 - 440	410 - 440	420 - 440	
LWC offset 60 g	770 - 820	770 - 820	770 - 830	
LWC newspaper 60 g	760 - 810	760 - 810	760 - 840	
LC offset 80 g (A)	470 - 710	470 - 710	470 - 720	
LC newspaper 80 g (A)	470 - 710	470 - 710	460 - 720	
Corrugated case material				
Primary fibre corrugated case material	800 - 910	790 - 870	780 - 830	
Unbleached kraftliner 150 g	440 - 730	440 - 730	420 - 710	
Seal chemical fluting	800 - 900	800 - 900	810 - 910	
White top kraftliner 140 g	800 - 900	800 - 900	810 - 910	
Recycled corrugated case material				
Recycled fluting 100 g	400 - 700	400 - 700	420 - 640	
Recycled fluting 100 g	400 - 720	400 - 720	430 - 660	
Testliner B	700 - 730	700 - 730	640 - 670	
Testliner B	400 - 710	400 - 710	430 - 650	
White top testliner grade B, 140 g	720 - 750	720 - 750	660 - 710	
Cartonboard				
GD B	840 - 970	840 - 970	810 - 940	
GD C	1,140 - 1,230	1,140 - 1,230	1,100 - 1,200	

There were also many talks taking place in June in the publication paper market, where buyers have recently been calling for reductions, while producers insist on unchanged prices. The first deals have been signed. Prices are starting to shift for woodfree coated and uncoated papers, where price pressure had been mounting. Invoices for many June deliveries contained the same prices as in the previous month, but mark-downs were already reported in some cases.

Fine paper quotes often unchanged, low-priced offers still common

Conditions on the market for woodfree coated and uncoated papers in France are still similar to those seen over the past few months. Producers describe demand as modest or slightly weak. Compared to other European markets, France was faring pretty well, market insiders told EUWID. Nevertheless, producers' order backlogs and capacity utilisation continue to vary. The typical average rate of capacity utilisation in recent months is said to be 70 per cent, but some firms were reporting slightly higher figures. Other production facilities were said to be less busy.

Regardless of the wide variation in producers' order books, the European market overall has excess capacity. For uncoated papers, consumption in Europe this year is forecast to be slightly more than 4 million t. This is contrasted by production capacity of well above 5 million t. It is a similar situation for woodfree coated papers, where producers currently have production capacity totalling more than 3.5 million t, whereas demand in Europe this year is estimated to be slightly more than 2 million t.

In June, prices for both woodfree coated and uncoated printing and writing paper in France were said to be mostly unchanged compared with the previous month. Simultaneously, low-priced offers continue to surface from both European and non-European suppliers, significantly undercutting official list prices. There are already signs that the usual summer discounts will likely be granted this year, which will undermine price stability, market participants say. Some mark-downs have reportedly already been implemented in June.

The range of prevailing prices on the market remains wide, and especially in the copy paper segment, there are significant differences depending on the producer and offer.

There is consensus that the structural transformation of the market will continue. Again and again, print applications are up for discussion as the march of digitalisation progresses. Recently, France's Interior Ministry commissioned a study to compare the detailed costs for printed materials versus digital solutions. The study found that switching to digitalised solutions would be cheaper for many users. Moreover, structural changes are constantly being driven by legislation, such as the rules on invoicing between companies which have been in effect in France since 2021.

First deals signed for publication paper, but many talks ongoing

When asked about the outcome of publication paper price negotiations in France for the third quarter, market participants painted a mixed picture. Some players said they had already concluded some or most of their contracts, while others reported that most agreements were still unsigned.

Ahead of the talks, paper producers insisted that a price hike for newsprint was needed and would be pushed for, but this position proved to be untenable. Ultimately, producers have pushed back against customers' calls for price reductions – especially for magazine paper – aiming to keep prices unchanged. In some cases, negotiations were still ongoing in the third week of June.

However, in the newsprint segment in particular, some deals have already been signed with unchanged prices, the market survey found. In other cases, customers keep pushing for price reductions for newsprint, which producers are unwilling to accept. The market was relatively balanced and there was no reason to make price concessions, papermakers said.

It is a somewhat different situation for magazine papers, in particular the coated mechanical grades. Especially the market for LWC/MWC has a significant capacity overhang and customers are demanding price cuts. Even after the closure of Kabel in Germany, Europe still has more than 3.5 million tpy of capacity for coated mechanical papers. This exceeds the volume of demand in Europe plus net exports by more than 1 million tpy. And demand in this segment continues to decline in 2025.

There are reports from the market about unchanged Q3 prices for LWC, but the price pressure remains and not all contracts have been signed. Mark-downs cannot be ruled out.

The market for SC paper is not quite as imbalanced. Players in France report relatively firm demand, bolstered by print advertising from retailers. In France, this market segment estimated to account for half of total SC paper consumption, and demand has stabilised here for now. But this segment is also facing overcapacity: Eurograph recorded demand of around 1.5 million t in Europe last year, while production capacity adds up to more than 2 million tpy. Moreover, demand is expected to shrink further this year.

In the current price round, some deals have been signed in France, but other negotiations were still ongoing in the third week of June. Here, too, producers are aiming for at least unchanged prices, while customers want to see lower prices.

Upward price trend stalls for recycled corrugated case material

After prices for brown recycled corrugated case material in France rose by €40/t in May or by June at the latest, producers were hoping to lift prices for white grades in June or July. But there was no price round initiated, so quotes for white-top testliner remained unchanged in June. It appears this may even be an inflection point for prices, as buyers want to see the latest price hike reversed, arguing that prices for ordinary recovered paper grades are falling. During the upward price swing, producers repeatedly stressed the need to offset rising costs, especially for recovered paper, market insiders comment. Now that the price trend for recovered paper has reversed, buyers are asking that these decreasing costs be passed along too. The relationship between supply and demand had never justified a price hike and the latest increases had all been cost-driven, they argued. Moreover, producers of corrugated board say they are not in a position to pass the latest hike on to their own customers.

Quotes for the ordinary recovered paper grades in France softened in June, mostly by €20/t, which is prompting customers to call for prices to be renegotiated. Players said, however, that prices were unlikely to change in June and adjustments were possible only for deliveries as of July.

Demand for recycled corrugated case material in France barely improved in June. Paper producers reported weakish to modest demand when describing their current orders and activity levels. In the first quarter of this year, the corrugated board industry in France and across Europe grew by a few percentage points compared to the same period last year. But this is not sufficient to fill up the existing paper capacities – particularly since additional capacities have come online recently, with more to come soon. Over the past weeks, the rebuilt paper machine at Norske Skog's French Golbey site was started up, as was the converted machine at Mondi's paper mill in Duino, Italy. Particularly when these new capacities were not integrated, it created additional competitive pressure, said players in the market. To offset this, the market needed more growth.

The current oversupply on the market is also evident in the recent uptick in paper inventories. "We need downtimes over the summer, or else there will be massive inventory build-up and price pressure," one paper producer said.

It is a slightly different picture on the kraftliner market, where prices rose by €40/t in most cases in June, or sometimes slightly less. However, this was only true for brown kraftliner, while white-top kraftliner and semi-chemical fluting had unchanged prices in June.

Kraftliner producers say they are seeing somewhat better demand than for the recycled grades, with comments on demand ranging from “stable” to “good.” As there was less supply-side pressure here and the market had grown modestly in the first quarter, there was currently no price pressure, EUWID was told. Here, too, the upward price spiral seems to have come to an end, but players anticipate stable prices in the near term.

Experts currently see little chance for the French corrugated market to build on its modest growth. Given the geopolitical situation, consumer sentiment was not euphoric and consumer spending power was recovering only slowly, they said.

No price changes on the cartonboard market

The cartonboard market in France remained weak in June. Some producers of GD board (white-lined chipboard – WLC) had been optimistic that they would be able to raise their sales prices yet again, but this optimism is now fading. Producers of GC board (folding boxboard – FBB) likewise do not believe that mark-ups will be possible anytime soon. In other respects, the market was broadly unchanged and prices for both GD2 and GC2 were stable this month in France.

GD producers just recently concluded a price round. In March or April, they were able to implement mark-ups averaging €30/t with their customers. In the producers' view, this step was urgently needed owing to the cost situation, especially after the hefty rise in recovered paper prices in March and April. Since producers often felt this increase was insufficient, several suppliers were soon mulling further steps.

Back in May, several GD board producers were still considering or at least had not ruled out the idea of implementing a second price increase for deliveries in July or later. But by June, most of these plans had been abandoned again. Only a couple of smaller suppliers were asking their customers to pay around €20/t more as of July, according to market participants. Some market experts believe this is meant to send a signal to buyers aimed at fending off calls for price cuts.

Most suppliers said there was no leeway for further price increases on the WLC market at the moment. One contributing factor here is that prices for recovered paper have begun falling again after a short phase of stability and are expected to tumble further in July. Moreover, the current level of demand did not support price hike plans, EUWID respondents said. Demand for WLC was described as relatively stable but still weak or “decent” at most in June. “It is not great but not disastrous either,” summarised one respondent.

It is a similar situation on the market for FBB. Here, too, market participants are not seeing any demand impetus but rather stagnation. Some said the situation was slightly better than in the recycled board segment and others reported a slight improvement after a weak month in May with its many bank holidays. However, nobody would describe this as a general recovery.

Following the price hikes in the GD segment, some suppliers of GC board had initially been hoping that this momentum would carry over to their market segment in the following months. Although they had not been planning any price hike announcements yet, these had not ruled out, either. In June, though, the idea of potential hikes for GC was no longer being floated. On the contrary: a few suppliers were already feeling downward price pressure, but this was not confirmed by all. In general, the market

participants surveyed by EUWID expect stable prices for GC2 in July as well as the third quarter as a whole.

Insiders pointed out that demand in the GC segment was quite weak and some pulp prices had been softening recently. There are also a few elements of uncertainty that are making business and planning more difficult in the GC market. It remains to be seen how the tariff conflict between the USA and EU will play out. If GC board from the Nordic countries was no longer exported to the USA, this would likely mean greater supply on the European market, insiders said. In addition, the start-up of the new Stora Enso machine in Oulu is creating uncertainty here and there.

France: pulp and paper production					
January - May 2025					
1,000 t	May			Jan - May	
	2025	2024	%	2025	%
Total paper and board	579.8	584.3	- 0.8	2,754.7	- 1.7
thereof:					
Graphic paper	66.8	66.6	+ 0.2	328.3	- 1.5
thereof uncoated woodfree	35.9	39.5	- 9.1	178.3	- 8.2
Packaging paper and board	405.5	416.1	- 2.5	1,904.7	- 3.4
Corrugated case material	346.1	351.6	- 1.6	1,608.6	- 2.4
Paper for flexible packaging	17.7	21.5	- 17.9	89.4	- 11.3
Cartonboard	41.7	42.9	- 2.8	206.7	- 7.3
Sanitary paper	76.1	70.4	+ 8.1	371.6	+ 6.2
Total Pulp	132.1	126.2	+ 4.6	554.8	- 2.0
Recovered paper consumption	437.8	451.3	- 3.0	2,119.5	- 1.3
Source: COPACEL					

Recovered paper prices in France start to fall

Trend turnaround for ordinary grades amid softening demand

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A trend reversal has started on the recovered paper market in France. Prices of ordinary grades started to retreat in June and several insiders believe it is likely that further mark-downs will be coming in July. Demand has reportedly softened, while supply has risen. Prices for the deinking grades were stable, with only occasional mark-downs on the export market, and the market for higher grades was calm in June.

EUWID Price Watch Recovered Paper France				
June 2025				
Prices in € per tonne	June 2025	May 2025	April 2025	June 2024
Mixed paper and board (1.02)	50 - 65	70 - 85	70 - 85	85 - 95
Supermarket corrugated paper and board (1.04)	95 - 110	115 - 130	115 - 130	110 - 120
Old corrugated containers (1.05)	115 - 130	135 - 150	135 - 150	130 - 140
Sorted graphic paper for deinking (1.11)	105 - 115	105 - 115	105 - 115	120 - 130
Intra-Europe exports from France (1.11)	120 - 140	125 - 140	125 - 140	135 - 150
Coloured letters (2.06)	165 - 185	165 - 185	165 - 185	160 - 180
Multi-printing (3.10)	195 - 205	195 - 205	195 - 205	215 - 225
White woodfree uncoated slavings (3.18.01)	390 - 405	390 - 405	390 - 405	420 - 435
Prices in € per tonne ex works, material sorted and in bales.				
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In June, most prices for mixed paper (1.02), supermarket paper and board (1.04) and old corrugated containers (OCC, 1.05) became €20/t cheaper in France. Buyers said they had been expecting larger mark-downs, in line with those reported in Germany. However, the starting price level in Germany had been higher, market sources pointed out. Moreover, as a few insiders explained, producers of corrugated case material had recently gone to great effort to raise their own sales prices for finished paper and did not want to endanger these mark-ups, so they had an interest in limiting price pressure on recovered paper. Prices for the ordinary grades declined mainly due to weaker demand. The frenetic purchasing that occurred primarily in March and April had come to an end, respondents said. At the beginning of May, buyers had still been somewhat cautious ahead of the upcoming bank holidays, which always complicate material sourcing. The month of June, by contrast, has been a month without any interruptions. Most paper mills reported that the supply of recovered paper had improved significantly and that they were holding large recovered paper inventories.

Suppliers of recovered paper also noticed that customers no longer had such strong demand for ordinary grades. They especially noticed subsiding interest from German buyers. Overall, though, demand was not really that bad, commented one waste management firm representative. Paper machines in France were running and there were no downtime measures, EUWID was told. Therefore, despite having comfortable fibre inventories, buyers were regularly purchasing recovered paper, albeit somewhat less, explained one respondent. The waste management companies surveyed did not complain about especially high inventory levels. The volumes on hand at some sorting centres were somewhat higher, they reported. But several respondents said that material was generally moving well, pointing out that collection volumes remained low overall.

First upticks on Asian export market

Some suppliers of recovered paper were already starting to export a little more to Asia in June. Over the past months, sales to overseas customers had almost come to a complete standstill because of the very strong demand in Europe, where prices were significantly more attractive. Even in June, the export business had not yet fully revived, the market survey found. Nevertheless, a few suppliers resumed exports to Asia, although most of them were only shipping very small volumes. The prices that could be achieved here were still lower than those being paid in France, they said. Old corrugated containers were selling for between €100 and €110/t ex works to Asia, occasionally up to €120/t, while buyers in France were still prepared to pay up to €130/t ex works.

Several market participants noted that the export business could gain more momentum next month, if prices of ordinary grades in France fall again and thus approach the price level on the export market. Even if buyers would rather keep volumes within the country, many respondents expect a further price reduction in France in July. Supply was good and there were no longer worries about sourcing sufficient material, said one paper producer. Suppliers also did not rule out a price decrease, but believe that stable prices are also possible. Collection volumes were low and demand was weaker but still present, they said, adding that if the export business bounces back, there would also be alternative sales channels.

On the market for sorted graphic paper for deinking (1.11), demand was broadly unchanged during June. Demand in France was normal and prices held steady, market participants report. By contrast, demand from neighbouring countries was modest, according to some suppliers. For exports to these countries, price reductions of up to €10/t were seen here and there. Yet, many insiders also reported stable prices for exports of this grade.

There was little change on the market for higher grades of recovered paper in June. Prices for coloured letters (2.06) were flat, while demand was described as good. The tissue industry was purchasing its usual volumes, EUWID was told. Demand for multi printing (3.10) was reportedly less robust, but there is not much supply, so prices here were also stable. Similarly, price for white woodfree uncoated shavings (3.18.01) were said to be unchanged in June.

Demand for British RCP weak with price pressure

 **EUWID +** 25 June 2025 |  ~ 4 min | [Published in issue 26/2025](#)

The downward trend in prices for brown recovered paper grades used to make packaging paper has continued in the UK in June. Demand remains lacklustre both from mills within the UK and mills in Continental Europe. German customers, who had been viewed as the main drivers of the upturn in the spring, have largely vanished from the market. Demand for finished paper is cool, with surplus capacity continuing to weigh on the market. Many machines are currently offline or scheduled for downtime over the summer.

In light of this situation, prices for mixed paper and board (1.02) and old corrugated containers (OCC; 1.05) continued to fall in the UK and on export markets, with prices for domestic and foreign buyers converging.

First signs of stronger demand from Asia – but further price reductions sought

The first signs of renewed demand from Asia, particularly from Vietnam, Malaysia and Indonesia, are emerging. Buyers in these countries are under mounting pressure to place orders as inventory levels dwindle at their recovered paper depots. However, many Asian customers still view British prices as too high and are unwilling to accept current asking prices. Nonetheless, market players anticipate that another decline in prices in July might unlock more exports, helping to offset weak demand from both the UK and Continental Europe.

The situation in India remains complex. Surplus capacity and low capacity utilisation at many smaller mills are leaving their mark. While production has been interrupted in some cases, extended stoppages like those seen in Europe are uncommon. Observers anticipate growing market consolidation, with reports of numerous insolvencies already circulating. Experts interviewed by EUWID believe that overall demand for fibre is unlikely to decrease significantly, as larger facilities are expected to absorb the volumes which would otherwise have been sold to older mills now exiting the market.

Significant price cuts are evident for kraft-containing grades (4.02/4.03), as well. Key buyers, especially German packaging paper producers, continue to scale back their capacity, which is directly affecting British export volumes. Additionally, arisings of fruit boxes had risen for seasonal reasons, sources said.

Many market players believe that the price floor for brown grades will be reached in July – if it has not already been the case in

EUWID Price Watch Recovered Paper UK					
June 2025					
Prices in £ per tonne	June 2025	June 2025 €*	May 2025	June 2024	
Mixed paper and board (1.02)	55 - 75	64 - 88	65 - 80	50 - 90	
Mixed paper and board (1.02), export	65 - 80	76 - 94	65 - 85	65 - 90	
Old corrugated containers (1.05)	87 - 103	102 - 121	100 - 120	118 - 130	
Old corrugated containers (1.05), export	85 - 104	99 - 122	98 - 115	115 - 125	
Magazines (1.06) [†]	95 - 135	111 - 158	95 - 140	100 - 150	
Sorted graphic paper for drinking (1.11) [†]	80 - 110	94 - 129	85 - 110	90 - 120	
Newspapers (2.01) [†]	95 - 125	111 - 146	95 - 130	110 - 140	
Sorted office paper (2.05)	165 - 175	193 - 205	165 - 175	165 - 185	
Multigrade	165 - 175	193 - 205	165 - 180	155 - 185	
White newsprint (3.14)	190 - 230	222 - 269	200 - 230	210 - 230	
White woodfree uncoated shavings (3.18.01)	360 - 400	421 - 468	360 - 410	390 - 420	
* Exchange rate as of 20 June 2025: £1 = €1.17					
† Includes exports and non-paper applications			Prices ex works, material sorted and in bales		
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June.

With prices continuing to trend lower, much of the material is being sold at the start of the month. Any surge in demand later in the month, caused for instance by short-term needs at European paper mills, could send prices soaring again, especially since collection volumes are low.

Deinking and tissue businesses quieter than expected

The British market for deinking grades is demonstrating a slight downward trend. Lower machine utilisation rates in Europe and supply pressure have led to concessions on prices, with some reports indicating much larger price cuts than those reflected in the EUWID price watch.

The market for woodfree recovered paper grades remains unusually calm. Tissue manufacturers typically ramp up their purchasing ahead of the summer months to offset seasonally weak collection volumes during the summer. However, stockpiling was subdued this year.

One reason for this is the planned shutdown of Essity's mill in Prudhoe, which will not resume operation until the new Unifibres facility comes online, likely in November. The mill has limited storage capacity and can only stockpile small amounts. As a result, a noticeable recovery in demand is not expected before the fourth quarter.

Consequently, tissue manufacturers have no concerns about their supply situation and have kept prices stable or even made slight cuts.

Hopes rest on Asia, freight rates mired in uncertainty

Even though collection volumes remain low, market players tend to expect that prices will remain the same or decline slightly over the summer months. There is hope that Asian buyers will start purchasing more again, which might partly offset weaker demand from Europe. That being said, container freight rates are an area of growing concern. While there was no broad-based increase in June, rising oil prices and the formation of new shipping alliances are expected to lead to surcharges or higher rates in July, which might impact the ability to export British goods. Exporters are also facing challenges related to the exchange rate of the US dollar against the pound Sterling since trade in Asia is conducted in US dollars.

UK recovered paper exports

tonnes	January - March		% Change
	2025	2024	
Total EU 27	176,553	163,436	+ 8.0
France	31,612	30,046	+ 5.2
Germany	44,360	39,596	+ 12.0
Netherlands	61,942	64,200	- 3.5
Total other Europe	61,587	131,942	- 53.3
Turkey	61,261	131,942	- 53.6
Total Asia	776,024	740,564	+ 4.8
China	249	1,149	- 78.4
India	334,717	297,526	+ 12.5
Indonesia	77,535	76,322	+ 1.6
Malaysia	145,928	179,840	- 18.9
Thailand	61,177	67,890	- 9.9
Vietnam	147,794	112,725	+ 31.1
Total South America	120	65	+ 84.2
Total Africa	-	-	-
Total North America	-	17	-
Total Australasia	-	2	-
Total Exports	1,014,285	1,036,026	- 2.1

Source: CPI

Publication paper manufacturers try to roll over prices on the UK market

Further price increases for corrugated case material and cartonboard difficult

 25 June 2025 |  ~ 11 min | [Published in issue 26/2025](#)

In the British publication paper market, negotiations on prices for the third quarter were often still underway in mid to late June. Manufacturers want to hold prices at all costs, but buyers are pushing for price reductions. Price pressure has built up in the British fine paper market. Against the backdrop of relatively low capacity utilisation and falling pulp prices, some prices have been lowered.

EUWID Price Watch UK				
June 2025				
Prices in £ per tonne free delivered unless otherwise stated	June 2025	June 2025	May 2025	June 2024
	£	£*	£	£
Fine paper				
Woodfree uncoated				
Copy paper 80 g/m² grade	820 - 870	871 - 1,018	820 - 880	890 - 1,000
Copy paper 80 g/m² grade	790 - 840	854 - 951	790 - 850	860 - 970
Other news 80 g	880 - 920	1,025 - 1,276	880 - 920	920 - 1,070
Other news 80 g	880 - 890	908 - 1,030	880 - 890	880 - 910
Woodfree coated				
Sheet, double coated, 105 g	880 - 940	1,041 - 1,136	880 - 940	940 - 1,010
Sheet, double coated, 105 g	880 - 940	950 - 1,036	880 - 940	880 - 950
Publication paper				
Standard newspaper 42 g	480 - 510	562 - 587	480 - 510	480 - 490
Standard newspaper 42 g	480 - 520	573 - 608	480 - 520	480 - 500
Standard newspaper 40 g	500 - 530	585 - 620	500 - 530	480 - 510
Improved newspaper 32 g, 30x48	530 - 560	620 - 655	530 - 560	480 - 530
UPC offset 90 g	480 - 500	772 - 819	480 - 500	480 - 520
SC offset 90 g, 30	580 - 610	679 - 714	580 - 610	600 - 640
Corrugated case material				
French Blue corrugated case material				
Unbleached kraftliner 150 g, European quality	720 - 770	842 - 981	720 - 770	800 - 780
White top kraftliner 180 g, European quality	880 - 870	942 - 1,024	780 - 870	780 - 820
Recycled fluting 180 g	550 - 600	648 - 708	550 - 600	530 - 580
Recycled fluting 180 g	550 - 610	648 - 714	550 - 610	540 - 580
Recycled fluting 80 g	560 - 620	661 - 725	560 - 620	540 - 570
Testliner B	570 - 620	675 - 731	570 - 620	560 - 580
Testliner B	550 - 600	648 - 708	550 - 600	530 - 580
White top testliner grade B, 180 g	680 - 720	772 - 842	680 - 720	680 - 720
Cartonboard				
601	620 - 710	725 - 827	620 - 710	650 - 750
62 E	850 - 1,000	1,088 - 1,342	850 - 1,000	880 - 1,010

Demand for both corrugated case material and cartonboard in the UK is described as “not entirely bad”, but volatile. In both market segments, market insiders assume that price increases will be difficult to implement given the very broad supply. Nevertheless, one supplier of GD board has informed British customers of a price adjustment for the third quarter.

Fine paper prices under pressure

Demand for woodfree uncoated and coated paper in the UK remained stable in June. A comparison of delivery figures for the first five months of this year with those for the same period last year shows a significant drop for all grades. According to market insiders, demand is continuing to decline structurally, affecting printers and paper merchants alike. In terms of supply, UPM Nordland and Fedrigoni have recently removed capacity from the market, but there is still more than enough paper available to satisfy European demand.

A buyer’s market continues to prevail, explain market participants, pointing to the wide range of prices that has existed for a long time. For many months, there have been prices at the upper end of the scale that could be described as list prices, while at the other end there have always been special offers of all kinds at a considerably lower price level.

There now appears to be renewed movement in the overall price structure. While some market participants report invoicing their June deliveries at stable prices, others confirm price reductions. These cuts are being granted due to insufficient capacity utilisation. Lower pulp costs are giving some manufacturers room to adjust prices downward, a market insider explains. Pulp prices have already declined and are expected to fall further. Fine paper prices were inconsistent in June but, in some cases, dropped by as much as £30 per tonne.

The European market for woodfree printing and writing paper is currently facing overcapacities of more than two million tonnes. The UK market, which relies entirely on imports, cannot isolate itself from developments on the continent, unlike some other segments of the paper industry. Although non-European producers play a significant role in the British copy paper market, they represent only a portion of the overall supply.

Capacity utilisation among European manufacturers of fine papers remains too low on average. Even if the supply pressure from non-European producers eases slightly due to rising freight costs, this will not fundamentally change the current market situation, market insiders explain. Only capacity shutdowns can bring about a meaningful shift.

Negotiations on prices for publication paper on the home straight

In June, the UK publication paper market was primarily shaped by negotiations over pricing for the third quarter or the second half of the year. Until recently, paper manufacturers were largely advocating for price stability, while customers – particularly in the magazine segment – were pushing for reductions. While some contracts have already been concluded, talks are still ongoing in many cases.

Buyers are pushing for lower newsprint prices from 1 July – a demand that most manufacturers have so far resisted. As of mid to late June, negotiations were still ongoing, according to market sources. Paper producers say they cannot afford to grant price concessions without jeopardising profitability. This is especially true for European mills, where cost structures vary significantly and continue to weigh heavily on operations.

Although newsprint is generally seen as the most balanced segment among publication papers in terms of supply and demand, the market is nonetheless under supply pressure. This is not only coming from European manufacturers, Canadian manufacturers are also more active in the UK market than usual, despite the slightly higher prices for newsprint in North America compared to Europe. Of the approximately 200,000 t of newsprint supplied to Europe by Canadian manufacturers each year, a large proportion goes to the UK. This market is currently “the battleground” in Europe in terms of competition and supply pressure, explain respondents in the market. As of late June, the outcome of negotiations remained unclear with some observers not ruling out a rollover into the third quarter.

The same applies to the market for magazine paper, although downward price pressure in this segment appears to be even greater than for newsprint. Producers want stable prices, customers demand price reductions. The market for LWC in particular is still more of a buyer's market despite the shutdown of Kabel, but a similar situation also applies to the market for SC paper. As always, it's all about costs; for manufacturers, production costs leave little room for reductions, and for buyers it's about

minimising costs in a tight situation.

According to market insiders, the UK remains one of the weaker publication paper markets among the major sales regions in Europe. Paper manufacturers report that demand in the British market has declined by a further 10 per cent so far this year. With newspaper and magazine circulations continuing to fall, producers see little alternative but to further adapt their production capacities to the shrinking market.

Price increases on the British market for containerboard have been exhausted

Demand for corrugated case material, corrugated sheets and packaging in the UK remains below the expectations of many suppliers. Nevertheless, EUWID's market sources are not entirely dissatisfied with the current situation. Warm and sunny weather in recent weeks has occasionally stimulated consumption, for instance through increased leisure activities such as day trips and barbecues.

However, the market continues to be marked by significant volatility. Strong weeks are repeatedly followed by unexpectedly subdued periods, participants report. These fluctuations are not uniform across the market but occur at different times depending on the company, product segment or region. Some suppliers who observed a marked drop in demand in June are already voicing concerns that this could mark the beginning of a more prolonged summer lull.

According to industry representatives, the increase in social security contributions and the rise in the minimum wage, both in effect since April, are weighing on the British economy. These measures have had a noticeably negative impact, market observers say. Additional uncertainty stems from geopolitical tensions, including the risk of escalation in the Middle East, and an unclear global trade environment amid discussions of possible new US tariffs.

"Consumers lack both the financial means and the confidence to drive domestic demand," one market expert told EUWID. "In this climate, businesses are focusing primarily on risk avoidance."

Against this backdrop, efforts by manufacturers to implement further price increases for corrugated case material have largely stalled. Following the £50/t hike for brown recycled corrugated case material earlier this year, a second step in June failed to materialise. The price adjustment for brown kraftliner was also capped at £40–50/t. In the case of bleached linerboard, implementation proved even more difficult: for white-top testliner, the targeted £40/t increase was not achieved everywhere, but stalled at only £20/t in many cases. For white-top kraftliner, the increase was often limited to £20–30/t, sometimes also only £15/t.

Market participants now believe that the upward trend for paper has come to an end and that no further price increases are likely.

Converters were also ultimately able to push through higher prices for corrugated sheets and packaging, even though the British market had recently been characterised by overcapacity. According to most reports, prices for sheets rose by 5 to 7 per cent, and in some cases even more. For packaging, increases of 3 to 5 per cent were frequently reported, but here too, suppliers are said to have pushed through much larger adjustments.

Suppliers point out that, in addition to higher paper prices, they also had to cope with increases in other input costs. “Many suppliers were reluctant to pass on the higher costs and absorbed some of them at the expense of their own margins,” report industry players.

The difficult situation facing the UK corrugated industry is clearly evident in recent events. International Paper announced that it would close five former DS Smith sheet and box plants and cut capacity at other sites. In addition, Logson will close its Boxes and Packaging site in Leicester. At the beginning of the year, VPK had already announced the closure of its packaging plant in Leeds.

Added to this is the insolvency of packaging manufacturer Krystals, which was active in Progroup’s packaging park in Ellesmere Port. Critics say that the company operated at permanently low prices in the market. Market participants assume that Krystals’ site will find a new owner.

These events will result in a “much-needed” market consolidation, which will give other companies the opportunity to improve their capacity utilisation, according to several EUWID sources. Nevertheless, the development is a clear sign of the state of the entire market. The fact that plants belonging to or affiliated with large international companies are particularly affected by closure or insolvency also shows how important it is to manage such plants entrepreneurially, an expert told EUWID.

British market for cartonboard remains under pressure

The situation on the British market for cartonboard remains strained. While demand is not entirely weak, it varies significantly depending on the supplier and the customer sector. Capacity utilisation is solid in certain niches, particularly in the pharmaceutical industry, which continues to demonstrate its resilience – and in some cases, its strength – during times of crisis.

Growth in the area of plastic substitution, on which many players had pinned their hopes, has stalled. Market insiders suspect that this development is also related to the new extended producer responsibility (EPR) regulations in the UK. Since the fees are primarily linked to the weight of the packaging, cartonboard packaging, and especially packaging made from recycled cardboard, has a major disadvantage compared to plastic packaging.

The situation is particularly problematic for fibre-based packaging, whose EPR fees are almost on a par with plastic packaging, according to market participants.

Brand manufacturers and retailers who have been strong advocates of plastic alternatives in the past are now putting the brakes on. Officially, no one wants to admit this, but behind the scenes, projects are being halted or slowed down, according to market sources.

The switch to cartonboard and fibre-based packaging is considered capital-intensive – investments that many companies are shying away from in the current economic environment.

In this overall situation, cartonboard manufacturers are scaling back production not only for maintenance reasons, but also due to market conditions. A planned shutdown took place at the Holmen plant in Workington, UK, in June.

Overall, both cartonboard manufacturers and carton makers are struggling for orders and sales volumes. The insolvency of merchant Boardlink has opened up short-term opportunities in individual cases, for example for other suppliers of Incada cardboard.

However, according to one market expert, achieving volume targets is one thing. Profitability is another problem. 'We have to sell more and more cartonboard to achieve our targets,' explained a market insider.

Both fresh-fibre and recycled cartonboard is readily available in the desired qualities and quantities at short notice, which is causing concern in the industry, especially as additional capacity, such as from the Stora Enso plant in Oulu, has not yet reached the market. According to most observers, further consolidation in the sector is inevitable.

Weak demand in both the UK and across Europe, combined with increased import pressure, are key contributors to the oversupply situation. EU-produced board that cannot be shipped to the US due to punitive tariffs remains in the domestic market, while aggressive offers from Asian suppliers are adding to the pressure.

Weak demand in both the UK and across Europe, combined with increased import pressure, are key contributors to the oversupply situation. Cartonboard made in EU that cannot be shipped to the US due to punitive tariffs remains in the domestic market, while aggressive offers from Asian suppliers are adding to the pressure.

The competitive situation is particularly tough when it comes to board from Asia, which is being offered at what market participants describe as "crazy" price levels. Despite this, one supplier of GD board recently announced a price increase of £40/t for the third quarter. Whether this move will succeed remained unclear at the time of going to press, with many market players expressing doubts. "If they go through with this, they risk losing volume," said one industry source.

Compounding the challenges are ongoing logistical issues. Port strikes in Sweden have already led to delivery delays to the UK, and the market is bracing for further pressure as international container shipping rates are expected to rise.

UK key market data						
March 2025						
in tonnes	March			January - March		
	2025	2024	%	2025	2024	%
Production						
Corrugated case materials	111,283	110,734	+ 0.5	353,154	349,930	+ 0.9
Recycled Fluting	54,737	57,527	- 4.8	172,899	175,212	- 1.3
Testliner	56,546	53,207	+ 6.3	180,255	174,718	+ 3.2
Parent reels of tissue	62,369	64,574	- 3.4	173,876	186,452	- 6.7
Other papers and boards, incl. printing and writing paper	89,225	105,034	- 15.1	278,848	301,065	- 7.4
Total production	364,160	391,068	- 6.9	1,118,932	1,191,375	- 6.1

Total paper and board	262,811	280,342	- 6.2	803,818	837,447	- 3.8
Apparent Consumption						
Packaging paper and board	n. a.	n. a.	n. a.	868,197	848,540	+ 2.3
Corrugated case materials	185,608	184,049	+ 0.8	588,061	578,239	+ 1.7
Kraftliner and SC Fluting	28,135	29,683	- 5.2	85,043	92,339	- 7.9
Recycled Fluting	60,599	68,682	- 11.8	206,093	208,096	- 1.0
Testliner	96,874	85,684	+ 13.1	296,925	277,805	+ 6.9
Cartonboard and other board for packaging	n. a.	n. a.	n. a.	232,477	223,263	+ 4.1
Packaging papers	n. a.	n. a.	n. a.	47,659	47,038	+ 1.3
Parent reels of tissue	92,333	93,895	- 1.7	264,747	292,230	- 9.4
Printings and writings	n. a.	n. a.	n. a.	297,372	324,791	- 8.4
Uncoated mechanical	n. a.	n. a.	n. a.	43,045	50,177	- 14.2
Uncoated woodfree	n. a.	n. a.	n. a.	118,647	139,416	- 14.9
Coated mechanical	n. a.	n. a.	n. a.	70,520	68,119	+ 3.5
Coated woodfree	n. a.	n. a.	n. a.	65,160	67,078	- 2.9
Other papers and boards	n. a.	n. a.	n. a.	137,421	148,377	- 7.4
Total paper and board	n. a.	n. a.	n. a.	1,567,737	1,613,939	- 2.9
Exports						
Corrugated case materials	12,652	11,315	+ 11.8	31,539	39,219	- 19.6
Recycled Fluting	6,060	5,024	+ 20.6	13,471	18,059	- 25.4
Testliner	6,592	6,291	+ 4.8	18,068	21,160	- 14.6
Parent reels of tissue	237	33	+ 618.2	1,045	295	+ 254.2
Other papers and boards, incl. printing and writing paper	48,401	50,627	- 4.4	140,059	160,935	- 13.0
Total paper and board	61,290	61,975	- 1.1	172,643	200,449	- 13.9
Imports						
Corrugated case materials	86,977	84,630	+ 2.8	266,446	267,529	- 0.4
Kraftliner and SC Fluting	28,135	29,683	- 5.2	85,043	92,339	- 7.9
Recycled Fluting	11,922	16,179	- 26.3	46,665	50,943	- 8.4
Testliner	46,920	38,768	+ 21.0	134,738	124,247	+ 8.4
Parent reels of tissue	30,201	29,354	+ 2.9	91,916	106,073	- 13.3
Other papers and boards, incl. printing and writing paper	195,019	201,831	- 3.4	576,140	603,339	- 4.5
Total paper and board	312,197	315,815	- 1.1	934,502	976,941	- 4.3
Fibre						
Woodpulp mill usage						
Sulphate Bleached Softwood	22,675	28,540	- 20.6	66,393	82,538	- 19.6
Sulphate Bleached Hardwood	33,022	28,330	+ 16.6	94,941	91,069	+ 4.3
Other grades of woodpulp	15,293	20,146	- 24.1	54,375	58,024	- 6.3
Woodpulp imports						
Sulphate Bleached Softwood	25,204	21,606	+ 17.1	50,420	70,160	- 15.2

Sulphate Bleached Softwood	23,274	21,000	+ 17.1	33,420	70,100	- 13.3
Sulphate Bleached Hardwood	37,954	33,568	+ 13.1	103,907	105,075	- 1.1
Other grades of woodpulp	5,157	1,845	+ 179.5	9,050	5,708	+ 58.6
Recovered paper						
Mill usage	204,458	207,047	- 1.3	631,673	653,280	- 3.3
Collection	528,044	525,768	+ 0.4	1,614,635	1,663,603	- 2.9
Source: CPI						

Norske Skog Skogn will produce book paper from Q2 2026

 **EUWID +** 20 June 2025 | [Bernd Hecht](#) |  ~ 1 min | [Published in issue 26/2025](#)

Norske Skog announces its entry into the European book paper market. From Q2 next year, the company will produce book paper on PM 1 at its Skogn mill in Norway in addition to newsprint.



Following the rebuild of the paper machine at a relatively

low cost of €3.5m and last year's conversion of the Skogn mill to 100 per cent primary fibre, the PM will be able to produce both grades, the company says. Several satisfactory test runs have already been completed and positive feedback has been received from potential customers. PM 1 has a capacity of 140,000 tpy.

Norske Skog states that the implementation of the project will have no impact on its deliveries of newsprint from the Skogn mill and that it will gradually enter the book paper market from the second quarter of 2026, while at the same time reducing newsprint deliveries to Asian export markets.

Norske Skog is relocating part of its production capacity to a market with "stable market prospects" against the backdrop of a structural decline in demand for newsprint. Demand for mechanical book paper has remained stable on the European market, the company explains, and puts the current volume of the market at 400,000 tpy.

Norske Skog says the switch of the Skogn mill to primary fibre offers the possibility of producing bulky and bright paper based on TMP. In addition, paper bulk can be further increased to cover additional grade requirements for mechanical book paper.

Norske Skog also operates two other paper machines for newsprint at its Skogn mill. PM2 has a capacity of 135,000 tpy, PM3 can produce up to 210,000 tpy.

Rondo Ganahl sells Istanbul plant, exits from Turkish market

20 June 2025 | [Frauke Schmidt](#) | 🕒 ~ 1 min | [Published in issue 26/2025](#)

Austria-based Rondo Ganahl AG has sold its corrugated packaging plant in Istanbul, Turkey, to a local packaging producer. The decision marks the company's complete withdrawal from the Turkish market.



Rondo Ganahl exits the Turkish market

The Istanbul site was originally acquired by Rondo in February 2013 under the name MKB Oluklu Mukavva Kutu ve Ambalaj and had contributed positively to the group's

performance over the years. However, the site's spatial limitations meant that any strategic realignment in line with Rondo's long-term goals would have required significant investment at a different location.

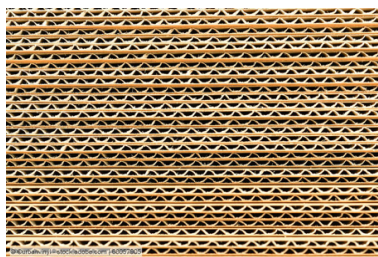
Rondo cited the strained economic environment in Turkey, rampant inflation, and substantial demands from trade unions as the key reasons for the divestment.

Going forward, Rondo plans to focus its economic activities on the group's existing sites in Austria, Romania, Germany, and Hungary. The goal is to optimise the use of resources, strengthen competitiveness, and ensure sustainable development across the company.

Austria's Rondo Ganahl Group produces customised corrugated board outer packaging, moulded fibre inner packaging, and corrugated base paper. The company also operates its own recovered paper collection and recycling system, supporting a closed-loop production process. The family-owned enterprise employs over 1,800 people across sites in Austria (Frastanz, Styria, Tyrol), Romania (Apahida/Cluj, Târgoviște, Sibiu), Germany, and Hungary.

Progroup starts test production at new corrugated sheet feeder plant in Italy

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German producer of corrugated case material and corrugated sheets Progroup has reached an important milestone at its new plant in Italy. The company reported that test production had begun at the newly built sheet feeder plant in Cessalto, close to Venice. "The plant is no longer a construction site – the team has moved in and is producing under real conditions for the first time," the company reported on its social media channels.

Progroup had announced the construction of the new plant in Cessalto in 2022 and laid the foundation stone last year. According to earlier company statements, the site will be able to produce up to 200,000 tpy of corrugated sheets. These will be converted into packaging at the adjacent plant of the company Ondulkart, Progroup's local partner. The plan was to create 60 new jobs at the new site.

Progroup operates another corrugated sheet feeder plant in Italy, located in Drizzona, also in the north of the country. It has a capacity of around 95,000 tpy of corrugated sheets and is adjacent to a plant of packaging manufacturer Imbal Carton.

Progroup has grown in recent years. Last summer, the company opened a new corrugated sheet feeder plant in Petersberg, Germany. A similar plant was built in Stryków, Poland, and began operations in early 2023. Both have a capacity of 200,000 tpy of corrugated sheets. A renovation and expansion project was also planned in the area around Progroup's existing plant in Douvrin, France.

Metsä Board: Production at Tako paperboard mill in Finland discontinued

18 June 2025 | [Frauke Schmidt](#) | 🕒 ~ 1 min | [Published in issue 26/2025](#)

Metsä Board has discontinued production at its Tako cartonboard mill in Finland with the shutdown of board machine BM 1 on 17 June.



The Tako mill discontinued production.

In January 2025, Metsä Board [announced that it would close the board mill](#), citing continued weak profitability and the desire to improve competitiveness as the reasons for the decision.

At the Tako site, Metsä Board manufactured GC1 cartonboard on two machines (BM 1 and BM 3) with a total production capacity of around 210,000 tpy, which according to earlier information reflects around 13 per cent of the company's total production capacity for folding boxboard.

The dismantling of the machines and production facilities is planned for 2026.

Production has been transferred from Tako to the Kyro board mill.

