

Nevertheless, further price rises in the third quarter now appear to be off the table for the time being, particularly as demand has eased. Whilst demand figures for coated fine paper in the UK were actually up year-on-year in the first four months, and those for uncoated grades were only down a few percentage points, reports now indicate a slowdown in demand. Paper manufacturers report that order intake has thinned out following the price increase, a development often attributed to customers' stockpiling prior to the implementation of the price rise. Market sentiment has also shifted in some areas with regard to prices. Market participants report that, particularly in the uncoated paper sector, suppliers are once again active, selling at all manner of prices. Whilst the range of prices charged had narrowed during the period of the price increase, market insiders report that prices are now once again varying considerably.

Publication paper manufacturers are pushing for higher prices

Negotiations on publication paper prices in the UK, most of which have already been concluded by the end of June, centred on manufacturers' demands for price increases. Some price rises were agreed, particularly for newsprint and SC paper.

Producers of newsprint had entered the negotiations with demands of varying levels. These ranged from £20/t in the majority of cases up to £50/t in exceptional instances. One North American producer demanded price increases of €100/t from its customers in Europe, but this is considered an exception. Market insiders report that suppliers with lower prices tended to demand higher price increases.

Market sources report that contracts already concluded include price increases of up to £20. In many cases, the increase for the third quarter also depends on how prices have already moved in the second quarter. For half-yearly contracts, for example, higher price mark-ups are applicable.

North American producers have shifted their focus somewhat and, to a certain extent, withdrawn from the European market. Prices in North America and the Asian market have risen, making these markets in some cases significantly more attractive than Europe. Furthermore, extensive production capacity has been shut down in North America in the recent past. Freight costs to Europe have also increased since March; as a result, North American producers still supplying Europe are, on average, demanding steeper price increases for the third quarter than their European counterparts.

Manufacturers have likewise demanded higher prices for magazine paper for the third quarter or the second half of the year. For SC paper, prices demands were quoted at £10-20 higher, of which £10-15 was successfully negotiated in some contracts.

Market participants report similar figures for LWC prices. Paper manufacturers' demands were likewise centred around £10-20, and in some cases even higher. However, the increases implemented tended to be even smaller than for SC paper; there are also reports of prices remaining unchanged.

Market sources explain that the latest round of price increases was purely cost-driven. The current balance of supply and demand does not really suggest any price rises, particularly in the LWC and SC segments.

It is highly unlikely that the market will change on the supply side in the coming months. No decisions on capacity closures are expected until the planned joint venture between Sappi and UPM – which will create a leading supplier with a significant market share in the LWC sector – comes into effect. The two companies are still sticking to their timetable, which envisages the joint venture coming into force towards the end of the year. Before then, antitrust decisions will be made which could delay the project.

Kraftliner producers seek second price increase from 1 July

The UK market for containerboard remained largely stable in June, without any major fluctuations. Demand for containerboard was again good during the month and has frequently been more than 1 per cent above the previous year's level so far this year, according to market insiders. Operating rates at recycled containerboard mills also remained satisfactory.

The planned closure of Smurfit Westrock's Birmingham mill in August is expected to have little impact on the market. According to industry sources, the paper produced at the site is predominantly converted within the group. Following the closure, production volumes are expected to be transferred to the Townsend Hook mill in Kent as well as to other mills on the European mainland. While this will result in logistical changes, no significant impact on the market balance is anticipated given the overcapacity across Europe.

Prices for brown recycled containerboard remained unchanged following the £80/t increase implemented in April. For white-top testliner, a £35/t increase is said to have been implemented as early as May. However, some converters reported that implementation was delayed until June. Even during that month, some market participants were still paying unchanged prices and will not pay the £35/t increase for white-top testliner until July.

The situation for kraftliner is currently different in the UK. A £50/t increase for brown kraftliner has already been implemented during Q2. The £30-35/t increase for white-top kraftliner also took effect with some delay, mostly during May and early June. Even here, however, further delays in implementing the higher prices have reportedly occurred in isolated cases, with a few customers not expected to pay the increases until August.

European producers of brown kraftliner, which managed to implement higher prices in some mainland European markets from mid-June onwards, are now planning similar initiatives in the remaining markets, including the UK. These producers are seeking a further £50/t increase to take effect from 1 July.

However, negotiations had still not been concluded by the end of June, and some converters reported that they were not even engaged in price negotiations at the time.

Paper mills emphasise that the European kraftliner market is currently balanced to tight. They cite seasonally good demand, upcoming annual maintenance shutdowns at European mills and lower kraftliner shipments from North America to Southern Europe. According to producers, this is also affecting availability in other parts of the continent as well as in the UK.

Nevertheless, UK converters are not concerned about supply availability. They believe that a second increase would further accelerate substitution, as the cumulative increase for brown kraftliner would then amount to £100/t, compared with £80/t for brown recycled containerboard.

Although substitution is already well advanced, converters point out that the quality and specifications of recycled fibre-based kraftliner alternatives have improved significantly in recent years, creating further opportunities for substitution.

Manufacturers of corrugated board and corrugated packaging also report positive demand. Following the increases in containerboard prices, prices for corrugated packaging have risen by between 7 and 13 per cent, depending on the grade and supplier, with the average increase estimated at 9 to 10 per cent. In most cases, these increases took effect in May.

Overall, many corrugated packaging manufacturers report cumulative volume growth of 1 to 2 per cent compared with the previous year. They note that 2026 had been expected to become a year of recovery, but that geopolitical developments have curtailed this improvement.

In many cases, the higher packaging prices are only being passed on to customers with a delay. Given the scale of the increases, some packaging manufacturers have agreed with customers to pass on the higher costs more quickly.

UK cartonboard market caught between stable demand and persistent cost pressure

According to industry sources, positive momentum came in part from the ongoing Christmas production season as well as the warm weather, which boosted sales of barbecue-related products.

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However, the market continues to be held back by the weak overall economic environment. Many folding carton producers and converters still lack the confidence to make long-term investments, such as developing new products or new packaging designs.

<https://www.euwid-paper.com/news/markets/publication-paper-manufacturers-call-for-q3-price-increases-in-uk-market/> Página 4 de 7

Supply of both GC (FBB) and GD (WLC) grades remains good, although lead times for British customers have lengthened slightly. Lead times for GD board are now generally quoted at five to six weeks, while deliveries of GC grades are extending into August and September. Nevertheless, market participants emphasise that both grades remain readily available at relatively short notice.

Cartonboard imported from overseas also continues to be widely available. Thanks to their competitive pricing, Asian producers have, over the last few months and years, further increased their market share in the UK, while South American suppliers have at best maintained their position, market insiders told EUWID. At the same time, sharply higher sea freight rates have reduced the price advantage of Asian material. Market participants were quoting prices of \$1,000 per container.

Higher energy and transport costs are also weighing on European manufacturers. Against this backdrop, cartonboard producers implemented energy surcharges and price increases during the second quarter.

GC board manufacturers recently informed customers that the surcharges – typically £25-30/t – will also remain in place in July. Converters, however, dispute the need for the surcharges, pointing to the fact that oil prices have fallen back to the levels seen before the outbreak of the Iran war. They are therefore pushing for the surcharges to be reduced or abolished from July onwards.

This, together with the threat of customers switching to Asian suppliers, prompted several European GC producers to make concessions, adopting varying strategies: In some cases, energy surcharges formally remained in place while base prices were reduced or other commercial concessions were granted. Other market insiders said the surcharges “exist only on paper”. “On average, prices for GC 2 board in the UK have increased, but by less than the amount of the announced surcharges,” one source commented.

At the same time, converters appear somewhat less willing to increase purchases from overseas suppliers, partly because of higher container freight rates and partly because supply chain security has once again become a greater priority. Several experts also expect the insolvencies of Folbb Baiersbronn and Folbb Eerbeek to reinforce this trend. “Customers are realising that we need a strong European industry,” one market participant said.

Following the sharp downturn in the GD market, prices now appear to have bottomed out. Driven by competition from very low-priced Asian material and weight-based EPR fees, GD board had been losing market share in the already GC-dominated UK market.

However, attitudes now seem to be changing. While some brand owners are using GD board to differentiate supermarket own-label products more clearly from premium brands, others are evaluating GD grades in light of the upcoming implementation of the EUDR. High-white, lightweight GD grades are considered particularly well positioned in this respect.

Despite the recent decline in oil prices, price pressure on GD board is less pronounced than in the GC segment. Many buyers acknowledge that cost inflation has been considerably greater for GD producers and that the price increases achieved so far have only partially offset these additional costs.

Imports of GD board from South Eastern Europe, Turkey and Asia continue to arrive in the UK. However, higher freight rates have significantly reduced the price advantage of Asian suppliers in particular. Once transport costs are taken into account, Asian GD board could be priced at levels comparable with European material.

UK key market data						
March 2026						
in tonnes	March			January - March		
	2026	2025	%	2026	2025	%
Production						
Corrugated case materials	116,398	111,283	+ 4.6	345,202	353,154	- 2.3
Recycled Fluting	54,998	54,737	+ 0.5	165,831	172,899	- 4.1
Testliner	61,400	56,546	+ 8.6	179,371	180,255	- 0.5
Parent reels of tissue	64,319	61,919	+ 3.9	177,258	173,426	+ 2.2
Other papers and boards, incl. printing and writing paper	101,441	89,675	+ 13.1	276,569	279,298	- 1.0
Total paper and board	282,158	262,877	+ 7.3	799,029	805,878	- 0.8
Apparent Consumption						
Packaging paper and board	n. a.	n. a.	n. a.	912,293	911,634	+ 0.1
Corrugated case materials	204,107	188,390	+ 8.3	596,520	595,048	+ 0.2
Kraftliner and SC Fluting	33,442	29,939	+ 11.7	100,344	90,922	+ 10.4
Recycled Fluting	62,519	61,600	+ 1.5	192,058	207,094	- 7.3
Testliner	108,146	96,851	+ 11.7	304,118	297,032	+ 2.4
Cartonboard and other board for packaging	n. a.	n. a.	n. a.	254,075	248,927	+ 2.1
Packaging papers	n. a.	n. a.	n. a.	61,698	67,659	- 8.8
Parent reels of tissue	96,040	91,883	+ 4.5	272,846	264,296	+ 3.2
Printings and writings	n. a.	n. a.	n. a.	312,952	304,372	+ 2.8
Uncoated mechanical	n. a.	n. a.	n. a.	44,325	44,045	+ 0.6
Uncoated woodfree	n. a.	n. a.	n. a.	133,137	129,647	+ 2.7
Coated mechanical	n. a.	n. a.	n. a.	76,659	70,520	+ 8.7
Coated woodfree	n. a.	n. a.	n. a.	58,831	60,160	- 2.2
Other papers and boards	n. a.	n. a.	n. a.	136,517	144,421	- 5.5
Total paper and board	558,595	533,899	+ 4.6	1,634,608	1,624,723	+ 0.6
Exports						
Corrugated case materials	16,117	12,652	+ 27.4	48,810	31,539	+ 54.8
Recycled Fluting	8,335	6,060	+ 37.5	21,314	13,471	+ 58.2
Testliner	7,782	6,592	+ 18.1	27,496	18,068	+ 52.2
Other papers and boards, incl. printing and writing paper	49,662	49,649	± 0.0	142,064	142,299	- 0.2
Total paper and board	65,779	62,301	+ 5.6	190,874	173,838	+ 9.8
Imports						
Corrugated case materials	103,826	89,759	+ 15.7	300,128	273,433	+ 9.8
Kraftliner and SC Fluting	33,442	29,939	+ 11.7	100,344	90,922	+ 10.4
Recycled Fluting	15,856	12,923	+ 22.7	47,541	47,666	- 0.3
Testliner	54,528	46,897	+ 16.3	152,243	134,845	+ 12.9
Parent reels of tissue	31,729	30,201	+ 5.1	95,739	91,916	+ 4.2

Other papers and boards, incl. printing and writing paper	206,661	213,363	- 3.1	630,585	627,334	+ 0.5
Total paper and board	342,216	333,323	+ 2.7	1,026,452	992,683	+ 3.4
Fibre						
Woodpulp mill usage						
Sulphate Bleached Softwood	26,095	23,908	+ 9.1	76,288	68,934	+ 10.7
Sulphate Bleached Hardwood	36,741	33,022	+ 11.3	101,384	94,941	+ 6.8
Other grades of woodpulp	20,486	15,293	+ 34.0	55,227	54,375	+ 1.6
Woodpulp imports						
Sulphate Bleached Softwood	24,621	25,294	- 2.7	63,997	59,420	+ 7.7
Sulphate Bleached Hardwood	46,145	37,954	+ 21.6	118,446	103,907	+ 14.0
Other grades of woodpulp	2,131	5,157	- 58.7	5,344	9,050	- 41.0
Recovered paper						
Mill usage	207,277	204,458	+ 1.4	600,741	631,673	- 4.9
Collection	550,257	528,044	+ 4.2	1,677,339	1,614,635	+ 3.9
Source: CPI						

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Little impetus for folding boxboard / Less demand for unlined chipboard

EUSD Price Watch Germany				
June 2021				
Price in Euro from reference currency	June 2021	May 2021	June 2021	June 2021
Foreign exchange				
European				
AUD, Canadian, Israeli, paper	620 - 700	620 - 700	600 - 700	600 - 700
Chinese, Hong Kong, paper	600 - 700	600 - 700	600 - 700	600 - 700
Chinese, Mainland, paper	600 - 700	600 - 700	600 - 700	600 - 700
Indian, paper	600 - 700	600 - 700	600 - 700	600 - 700
Japanese, paper	600 - 700	600 - 700	600 - 700	600 - 700
South African, paper	600 - 700	600 - 700	600 - 700	600 - 700
US dollar, paper	600 - 700	600 - 700	600 - 700	600 - 700
Non-Eurozone				
British, cash	600 - 700	600 - 700	600 - 700	600 - 700
British, 12-month, 10% bond, variable, 10% coupon	600 - 700	600 - 700	600 - 700	600 - 700
Commodity				
Precious metal				
Aluminum, 1000 lbs	580 - 610	580 - 610	580 - 610	580 - 610
Antimony, 1000 lbs	580 - 610	580 - 610	580 - 610	580 - 610
Barium, 1000 lbs	580 - 610	580 - 610	580 - 610	580 - 610
Bismuth, 1000 lbs	580 - 610	580 - 610	580 - 610	580 - 610
Brass, 1000 lbs	580 - 610	580 - 610	580 - 610	580 - 610
Butter, 1000 lbs	580 - 610	580 - 610	580 - 610	580 - 610
Copper, 1000 lbs	580 - 610	580 - 610	580 - 610	580 - 610
Gold, 1000 lbs	580 - 610	580 - 610	580 - 610	580 - 610
Iron, 1000 lbs	580 - 610	580 - 610	580 - 610	580 - 610
Lead, 1000 lbs	580 - 610	580 - 610	580 - 610	580 - 610
Mercury, 1000 lbs	580 - 610	580 - 610	580 - 610	580 - 610
Nickel, 1000 lbs	580 - 610	580 - 610	580 - 610	580 - 610
Platinum, 1000 lbs	580 - 610	580 - 610	580 - 610	580 - 610
Silver, 1000 lbs	580 - 610	580 - 610	580 - 610	580 - 610
Steel, 1000 lbs	580 - 610	580 - 610	580 - 610	580 - 610
Tin, 1000 lbs	580 - 610	580 - 610	580 - 610	580 - 610
Zinc, 1000 lbs	580 - 610	580 - 610	580 - 610	580 - 610
Energy				
Crude oil, 1000 lbs	580 - 610	580 - 610	580 - 610	580 - 610
Gas, 1000 lbs	580 - 610	580 - 610	580 - 610	580 - 610
Heating oil, 1000 lbs	580 - 610	580 - 610	580 - 610	580 - 610
Propane, 1000 lbs	580 - 610	580 - 610	580 - 610	580 - 610
Coal, 1000 lbs	580 - 610	580 - 610	580 - 610	580 - 610
Wood, 1000 lbs	580 - 610	580 - 610	580 - 610	580 - 610
Grain				
Wheat, 1000 lbs	580 - 610	580 - 610	580 - 610	580 - 610
Barley, 1000 lbs	580 - 610	580 - 610	580 - 610	580 - 610
Oats, 1000 lbs	580 - 610	580 - 610	580 - 610	580 - 610
Rice, 1000 lbs	580 - 610	580 - 610	580 - 610	580 - 610
Soybeans, 1000 lbs	580 - 610	580 - 610	580 - 610	580 - 610
Corn, 1000 lbs	580 - 610	580 - 610	580 - 610	580 - 610
Flour, 1000 lbs	580 - 610	580 - 610	580 - 610	580 - 610
Feed, 1000 lbs	580 - 610	580 - 610	580 - 610	580 - 610
Hay, 1000 lbs	580 - 610	580 - 610	580 - 610	580 - 610
Straw, 1000 lbs	580 - 610	580 - 610	580 - 610	580 - 610
Timber, 1000 lbs	580 - 610	580 - 610	580 - 610	580 - 610
Wool, 1000 lbs	580 - 610	580 - 610	580 - 610	580 - 610
Other				
Aluminum, 1000 lbs	580 - 610	580 - 610	580 - 610	580 - 610
Antimony, 1000 lbs	580 - 610	580 - 610	580 - 610	580 - 610
Barium, 1000 lbs	580 - 610	580 - 610	580 - 610	580 - 610
Bismuth, 1000 lbs	580 -			

Contacts from the paper industry reported that order books had remained good in June. That said, experts noted that the corrugated board industry was not running at the same high level of utilisation across the board. Buyers told EUWID that call-off volumes have been a little more subdued of late, something that was also attributed to seasonal factors. Sources said the corrugated board machines were still essentially operating at decent workloads at the end of June. With summer and the holiday season just around the corner, however, sources wondered how long this might last. Paper manufacturers surveyed for this report painted a similar picture.

As the last full week of June came to an end, recycled corrugated case material manufacturers had not announced any further price plans for July, the EUWID survey found. In the first half of June, certain mills had still been saying that they would first see how the kraftliner price round played out before deciding on any fresh demands. Although kraftliner producers did succeed in pushing through hikes for brown and white-top kraftliner around mid-month, companies making recycled grades have, so far, held off from any new attempts.

Sharp drop in demand for unlined chipboard in June

As June came to an end, demand was generally subdued on Germany's cartonboard market, with several insiders describing it as "almost too quiet" for the time of year. Insiders contacted by EUWID said that this was evidently the case more for recycled board than for fresh-fibre board (folding boxboard – FBB). In early June, GD manufacturers and converters were already reporting that order intake in Germany looks to be gradually losing momentum. Market players confirm a similar situation as the month draws to a close. At the same time, it is becoming clear that capacity utilisation at GD board machines varies quite noticeably from mill to mill and depending on product mix, even within the same company.

The slump in the unlined chipboard business was said to be even much more palpable. A few manufacturers reported a downright "collapse" in demand from the packaging industry. Others had anticipated the typical seasonal slowdown with the holidays drawing near. However, this downturn was happening too early and was having an unexpectedly strong impact, they said. The underlying causes for this drop were still unclear at the time of writing, with insiders pointing to a mix of different factors at play.

Now and again, insiders are reporting cases of cartonboard machines being run at reduced speed or even temporarily shut down. There have also reportedly been isolated talks about making concessions or even reversing the price increase for unlined chipboard implemented in June. However, the wider market did not confirm this in discussions with EUWID. Most of the unlined chipboard producers interviewed acknowledged the need to stabilise prices in view of current cost levels.

Market players agree that unlined chipboard and GD 2 prices held steady across the board in Germany. According to information available to EUWID, there are currently no new price plans in place to take effect from July. Ongoing talks about GD 2 focus on half-year contracts that are now expiring, where suppliers are looking to bring conditions into line with the price increases implemented in April.

The German folding boxboard market was also displaying little real momentum in late June compared with the previous survey. "Things are just bubbling along," one supplier told EUWID in June. Another GC 2 board manufacturer likewise reported little change in demand. Cartonboard mills unanimously reported few new projects on the market, something that is mirrored on the customer side, too. The financial troubles facing Folbb's two GC board mills in Baiersbronn and Eerbeek also caused a stir at the end of June.

When it comes to pricing, industry players from both the cartonboard and folding carton sectors confirmed no broad-based shift in GC 2 prices in June. Some buyers that had previously not agreed to paying any surcharges said they could envisage doing so from July. One supplier is reported to have a concerted push to introduce such mark-ups from June onwards in a few instances.

At the same time, the energy surcharges introduced for GC 2 back in April remain in force. That being said, EUWID research found a few initial moves by packaging companies to renegotiate or reduce these surcharges, although this is not yet happening across the market as a whole.

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Diwass rollout sparks criticism from paper and recycling industry

Launch of digital waste shipments platform beset by technical problems

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The introduction of the EU's Digital Waste Shipment System (Diwass) has drawn widespread criticism from the paper and recycling industry. While paper manufacturers and recycling companies generally welcome the digitalisation of cross-border waste shipments, they told EUWID that the new system is creating a significant additional administrative burden, complex registration procedures and numerous unresolved practical issues.

Diwass was due to become operational on 21 May 2026 alongside the entry into application of the 2024 revisions to the EU Waste Shipment Regulation (WSR), providing a digital platform for handling administrative procedures related to cross-border waste deliveries. As the necessary technical infrastructure is not yet fully in place, however, the European Commission has proposed transitional arrangements until the end of this year for shipments within the EU not subject to the notification procedure. During this period, such shipments may continue to be accompanied by a paper Annex VII document if it cannot be provided electronically.

Diverging national approaches complicate transition

However, Member States are implementing the new Waste Shipment Regulation in different ways during the transitional period. The resulting patchwork of national procedures is creating additional uncertainty and further complicating cross-border trade. For example, Germany requires the revised WSR's Annex VII document, while Denmark has retained the previous legal framework for the duration of the transition period. Andreas Otto of German recycling industry association Bvse points out that Article 18(10) of the revised Waste Shipment Regulation introduces new requirements related to contracts. Whereas previously the contract only had to be concluded between the notifier and the consignee of a waste shipment, the operator of the recovery facility must now also become a contracting party if it is not identical to the consignee. Mr Otto told EUWID that many market participants are still unaware of this change.

The contract must also specify, among other things, its duration, and identify the "responsible persons". Here, too, market participants report differing interpretations by the competent authorities, with suggested contract periods ranging from one to five years or even an indefinite term. In practice, companies are currently using numerous different contract versions, which must be negotiated between business partners in various language versions.

Mr Otto added that many paper mills are also unaware that they are required to confirm receipt of a transfrontier shipment within two days and completion of the recovery operation within 30 days.

Registration adds to administrative workload

Companies also describe the registration process for the Diwass platform as burdensome. While the process itself is generally "feasible", smaller companies in particular will be forced to devote significant additional staff resources to completing it.

The registration of freight forwarding companies remains another major concern. According to industry representatives, once the digital platform becomes fully operational, it will no longer be sufficient for the contracted logistics provider to be registered. Instead, the company actually carrying out the transport must be registered. Where subcontractors are involved, this could create considerable practical difficulties.

Stakeholders criticise the two-day rule

The industry's main concern centres on the so-called two-day rule laid down in Article 18(5) of the revised Waste Shipment Regulation. It requires the information contained in the Annex VII document to be submitted electronically via Diwass no later than two working days before the shipment begins. In many EU member states, application of this requirement has been suspended during the transitional period.

Both recycling companies and paper mills argue that transboundary recovered paper shipments are often arranged at very short notice. Decisions on which volumes will be delivered to which mill are frequently taken only the day before, or even on the day of dispatch.

Industry representatives therefore argue that the mandatory advance notification period is incompatible with the realities of the recovered paper business. They are calling for the rule to be reviewed before Diwass becomes fully operational. The umbrella organisation Recycling Europe and the Prinzhorn Group have likewise identified the two-day rule as one of the system's principal shortcomings.

Adding to the complexity, some member states, including France, already require advance notification of planned shipments by e-mail.

German implementation still pending

According to Mr Otto, further uncertainty stems from the fact that Germany has yet to adapt its national legislation to the revised WSR. Neither the necessary national legislation nor an updated version of the LAGA M25 implementation guidance reflecting the new legal framework have yet been adopted.

According to persons familiar with the matter, amendments to Germany's Waste Shipment Act are expected later in 2026. A revised version of the LAGA M25 guidance is unlikely to be published before 2027.

Industry warns of substantial additional bureaucracy

Overall, many recovered paper market participants take a highly critical view of the new system. Several interviewees described Diwass to EUWID as a "bureaucratic monster".

In Mr Otto's view, the design of the system reflects a political objective of subjecting transboundary waste shipments to closer scrutiny. "The Waste Shipment Regulation and Diwass are intended to make cross-border trade in 'waste' – including recovered paper – more difficult. Cross-border trade is regarded as one of the main causes of illegal waste shipments. This is problematic because trade is essential for a functioning circular economy," the Bvse expert said. One industry representative told EUWID that "Diwass effectively turns recovered paper from a green-listed into a yellow-listed waste". At the same time, interviewees stressed that the full impact of the new system will only become apparent once it is fully operational and the transitional

arrangements come to an end.

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Export demand creates slight price uplift on the British recovered paper market

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The British market for recovered paper was predominately characterised by stability in June. While supplies remained rather tight, paper producers' need for material held steady.

The strong demand for old corrugated containers (OCC;

1.05) continued in June. However, after a strong month in May, British papermakers were somewhat more restrained in their purchasing. This was offset by continued strong interest from buyers in Turkey and the Far East, especially Vietnam and Indonesia, which provided additional support for prices. Exports to Asia reached peak prices of as much as £110/t ex works.

Recovered paper from the USA has recently become more expensive after collection volumes there declined. Experts told EUWID that high fuel prices had prompted the suspension of collection activity in some US regions where collections were barely profitable. This had a positive impact on demand for recovered paper in Europe.

Yet, market participants expect US recovered paper prices to subside again, noting that oil prices have retreated to levels seen prior to the outbreak of war with Iran. Moreover, the influx of visitors to the FIFA World Cup could generate additional collection volumes.

European customers also had to accept higher prices in response to the firmer export market, although price increases within Europe were less pronounced. Even so, there were isolated reports of prices on the European market reaching as much as £109/t. The rise in OCC prices was also supported by higher packaging recovery note (PRN/PERN) prices, which increased to £7.50-8.50/t. By contrast, the planned 2026 start-up of the new paper machine in Shotton has not yet had any effects on the free market, market players say.

Transport surcharges retreat back to single digits in June

Road transports surcharges retreated to below 10 per cent in June after reaching double-digit levels in May. This made shipping recovered paper to the EU easier again. However, market participants still say that lorry capacity for haulage to France is tight.

Freight rates for container shipping to Asia were broadly stable even though shipping companies had been calling for significant increases at the beginning of the month. Ultimately, shippers were often willing to compromise, as the sharply higher freight rates on the Asia to Europe route helped to partially "subsidise" the return of containers, said one market insider.

Mixed paper (1.02) was likewise sought-after and saw slight price increases on both the domestic and export markets. In particular, quotes rose at the lower end of the range in the UK market.

EUWID Price Watch Recovered Paper UK					
June 2026	June 2026	June 2026	May 2026	June 2025	
Prices in £ per tonne	£	4"	£	£	
Mixed paper and board (1.02)	55 - 68	64 - 79	50 - 68	55 - 75	
Mixed paper and board (1.02), export	55 - 78	64 - 90	55 - 76	65 - 80	
Old corrugated containers (1.05)	85 - 103	90 - 119	85 - 100	87 - 103	
Old corrugated containers (1.05), export	95 - 108	110 - 125	91 - 103	85 - 104	
Magazines (1.06) ¹	90 - 120	104 - 139	90 - 120	95 - 135	
Sorted graphic paper for printing (1.11) ²	80 - 95	90 - 110	80 - 95	80 - 110	
Newspapers (2.01) ³	95 - 110	110 - 128	95 - 110	95 - 125	
Sorted office paper (2.05)	125 - 135	140 - 157	125 - 135	165 - 175	
White woodfree letters (3.05) ⁴	250 - 270	290 - 313	250 - 270	-	
Multipurpose	135 - 150	157 - 174	135 - 150	165 - 175	
White newspaper (3.14)	180 - 220	209 - 255	180 - 210	190 - 230	
White woodfree uncoated drawing (3.18.01)	280 - 345	325 - 400	280 - 345	300 - 400	
1 Exchange rate as of 26 June 2026: £1 = €1.16					
2 Includes exports and non-paper applications					
3 From January 2025 onwards, the grade White woodfree letters (3.05) will be additionally covered by EUWID.					
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A similar upward price step was seen for supermarket paper and board. For kraft grades, the seasonally high demand during the harvest season resulted in mark-ups of around £5/t in most cases, the market survey found.

Despite a slight rise in prices for graphic recovered paper grades (1.11, 1.06 and 2.01) in some Continental European markets, prices in the UK were flat in June. Neither supply nor demand changed noticeably compared with May, respondents said. And market participants are not expecting a trend reversal in July, either.

Woodfree grades become more expensive in June and July

Somewhat more dynamic development was seen on the market for woodfree grades, which are used to produce tissue as well as white-top papers and board. Demand for sorted office paper (2.05) was stable in June, although the commissioning of Essity's Unifibres complex in Prudhoe, which is planned for early July, was already influencing the market. Quotes for "standard-quality" sorted office paper were unchanged, but material with a higher share of mechanical fibres, which used to be significantly cheaper, now costs nearly the same as the standard grade. This material is primarily sold to the Asian export market or to producers of graphic papers.

Market participants now expect that standard 2.05 will also see an uptick of around £10/t in July. Traditionally, summer is a weaker season with limited arisings of recovered paper. The start-up of production at the new Essity plant is likely to further tighten supply, according to insiders.

Demand for multi grade was said to be strong in June, though this additional interest was not coming from tissue producers but rather from other paper mills. Here, price increases could already be observed in June.

The bright white grades have not yet benefited from this development. On the contrary: Some market participants reported selling problems and slight price declines. Others said that the market remained stable.

UK recovered paper exports			
tonnes	January - March		% Change
	2026	2025	
Total EU 27	163,116	176,553	- 7.6
France	27,773	31,612	- 12.1
Germany	43,318	44,360	- 2.3
Netherlands	54,103	61,942	- 12.7
Total other Europe	138,068	61,587	+ 124.2
Turkey	138,017	61,261	+ 125.3
Total Asia	788,416	776,024	+ 1.6
China	273	249	+ 10.0
India	423,037	334,717	+ 26.4
Indonesia	77,021	77,535	- 0.7
Malaysia	157,213	145,928	+ 7.7
Thailand	50,359	61,177	- 17.7
Vietnam	65,710	147,794	- 55.5
Total South America	-	120	-
Total Exports	1,080,606	1,014,385	+ 7.4

Total Exports	1,067,070	1,014,263	17.4
Source: CPI			

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Pulpex prepares commercial launch of fibre bottle production in Glasgow

🔒 EUWID + 01 July 2026 | ⌚ ~ 2 min | [Published in issue 27/2026](#)

Pulpex is preparing to commence commercial production at its first industrial-scale manufacturing facility near Glasgow, marking an important step in the commercialisation of its fibre-based bottle technology. According to Scott Winston, Managing Director and Chief Science & Sustainability Officer, construction of the Scottish facility has been completed. The company is currently finalising the installation and commissioning of the equipment. The plant is scheduled to become operational by the end of the second quarter, with the first commercial products due to be shipped during the summer.

The facility currently comprises two production lines, with a third line set to be installed shortly. Once fully ramped up, it is expected to produce at least 37 million fibre bottles annually. Pulpex describes the site as the world's first industrial-scale fibre bottle manufacturing facility. Earlier project documents referred to a planned capacity of up to 50 million bottles per year.

Initially, the company will supply a range of standard bottle formats suitable for a broad variety of consumer and professional applications. Pulpex did not disclose the names of launch customers, saying that the participating brands would announce their respective product launches over the coming months. Mr Winston confirmed that water producer Purely Scottish Water will be among the partners to introduce products manufactured at the new facility.

The Glasgow site will also serve as a reference facility for future manufacturing partners. It will supply initial production volumes while new regional licenced plants are being commissioned and provide operational training for employees of partner companies. Research and development activities will continue to be based at Pulpex's Cambridge R&D centre in England.

Following the start-up of the Glasgow plant, Pulpex intends to accelerate the international roll-out of its licensing model. Perlen Papier has been designated as the company's manufacturing partner for the DACH region. According to Mr Winston, further regional partnerships are currently under discussion across several markets, ranging from Chile to Australia. "We are feeling confident that achieving our target of over one billion bottles in market by 2030 is well in hand," he said.

Pulpex has developed a fibre-based bottle made from "sustainably sourced woodpulp" that is designed to be recycled through existing paper and board recycling streams. Earlier this year, the company raised £62m in a Series D funding round to finance construction of the Glasgow facility. Investors included the Scottish National Investment Bank and the UK National Wealth Fund.

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B & B to produce label paper at Kämmerer Paper mill

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Austrian paper manufacturer Brigl & Bergmeister will produce wet-strength and alkali-resistant label paper at Kämmerer Paper's site in Osnabrück, Germany in future. Brigl & Bergmeister says it is also investing in cutting and embossing equipment, which is currently being installed at the Kämmerer Paper mill in Osnabrück and Brigl & Bergmeister's Vevče mill in Slovenia.

The capacity expansion is reportedly motivated by market demand after the closure of the Feldmuehle paper mill at the end of 2025.

Following tests, commercial production of smooth label paper in reels has already started in Osnabrück. From the end of 2026, Brigl & Bergmeister plans to produce wet-strength and alkali-resistant label papers in Germany in both reels and sheets. The products are then to be offered in both smooth and embossed versions.

Brigl & Bergmeister will produce label papers on Kämmerer Paper's PM 6 paper machine. The company puts the annual label paper production capacity at 15,000 to 20,000 t, while embossing capacity amounts to around 15,000 tpy.

Brigl & Bergmeister and Kämmerer Paper both belong to Austrian Roxcel group. The company previously operated in the market with one paper mill each in Niklasdorf, Austria and Vevče, Slovenia.

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RYAM accelerates strategic review with new CEO

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US specialty cellulose producer Rayonier Advanced Materials (RYAM) is pressing ahead with its strategic review and has appointed Daniel M. Krawczyk as President and Chief Executive Officer, effective immediately. After around two months under the leadership of a four-member Office of the Chief Executive Officer, the company once again has a clear leadership figure for the ongoing review process.

Former CEO Scott M. Sutton resigned with immediate effect in mid-April, after just three and a half months in the role. At the same time, the Board of Directors announced that it had launched a comprehensive review of strategic alternatives after the company said it had received unsolicited indications of interest from potential investors. Since then, RYAM has been evaluating a range of options to maximize shareholder value. These include a sale of all or part of the company, a strategic investment, a merger or other business combination, other strategic or financial alternatives, or continuing to execute on the company's standalone strategic plan. RYAM has engaged Morgan Stanley as financial advisor and Wachtell, Lipton, Rosen & Katz as legal counsel for the process.

Krawczyk is taking over the leadership of the company at a decisive stage. He will be responsible for leading RYAM's operations and business activities while also supporting the ongoing strategic review process. The company did not say whether Krawczyk's appointment indicates that the review is nearing completion. RYAM also did not provide a timetable for the process.

Rayonier Advanced Materials is one of the world's leading producers of high purity cellulose. Its Cellulose Specialties products are used, among other things, in filters, food additives, pharmaceuticals, LCD displays, high performance plastics and coatings. In addition, the company produces dissolving pulp, fluff pulp, high yield pulp, cartonboard, lignin, bioenergy and biofuels.

Total capacity amounts to around 885,000 tpy of cellulose, dissolving, and fluff pulp. This is spread across the two US mills in Jesup, Georgia, (600,000 t), and Fernandina Beach, Florida, (155,000 t), as well as the French mill in Tartas (130,000 t).

In Témiscaming, in the Canadian province of Québec, RYAM also operates an integrated board and pulp mill with the capacity of 180,000 tpy of folding boxboard and 230,000 tpy of hardwood-based high yield market pulp. The mill also used to produce high purity cellulose in the past. After temporarily suspending production in summer 2024, however, RYAM permanently discontinued production of high purity cellulose in Témiscaming in the first quarter of this year.

In the past financial year, RYAM reported total sales of \$1.46bn, adjusted Ebitda of \$133m and a net loss of \$421m. The weak performance was mainly attributable to lower prices and sales volumes in the Paperboard and High Yield Pulp business, the impact of the shutdown of cellulose production in Témiscaming, operational issues and strikes at Tartas. Net results were additionally affected by a non-cash tax charge related to the valuation allowance on deferred tax assets in Canada.

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Valmet starts restructuring process in northern Europe

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Finnish technology group Valmet has completed the consultation process launched at the beginning of 2026 concerning adjustments to its production network in Sweden and Poland as well as temporary workforce adjustments in Finland. The measures affect about 350 jobs and provide for the closure of the Sundsvall plant as well as organisational adjustments at the Goteborg and Jelenia Góra facilities in Poland. Related negotiations were begun in March 2026.

In parallel, Valmet has concluded change negotiations initiated in April regarding temporary layoffs in Finland against the background of the plants' workload falling below the anticipated levels. Valmet plans to carry out temporary layoffs of around 2,400 employees from June until the end of December 2026, which are expected to have a maximum duration of 90 days and will be implemented depending on the level of orders.

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Modernisation of TM 11 at ICT Kostrzyn finalised

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Andritz completed the modernisation of **ICT** Poland's TM11 machine at the integrated tissue paper mill in Kostrzyn nad Odrą. As part of the rebuild, the tissue line originally supplied by Andritz in the early 2000s received a new shoe press and hydraulic automation for the reel. Andritz says that the rebuild will increase daily production by 2.5 per cent and reduce specific consumption of steam, gas and electricity by 5 per cent. The upgrade is part of ICT's modernisation strategy at several locations.

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Lenzing appoints Georg Kasperkovitz as CEO

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Lenzing has appointed **Georg Kasperkovitz** as chief executive officer (CEO), with the appointment having taken effect on 1 June 2026. He continues to serve as chief operations officer (COO) in addition to his new role. Mr Kasperkovitz succeeds **Rohit Aggarwal**, who stepped down as CEO at the end of January for personal reasons. Since then, the company had been managed by a threemember management board comprising Mr Kasperkovitz, chief financial officer **Mathias Breuer** and chief pulp officer/chief technology officer **Christian Skilich**. Lenzing has also established an Executive Committee comprising the three-member management board and Senior Commercial Managers **Patricia Sargeant** (nonwovens fibres), **Yann Lepage** (textile fibres) and **Anton Putz** (pulp).

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Cecilia Karlsson new CFO of Södra

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Swedish pulp producer **Södra** has appointed **Cecilia Karlsson** as its new Chief Financial Officer (CFO). She will assume office on 1 December 2026 and will also become a member of the group's executive board. Ms Karlsson succeeds Magnus Örnberg, who will remain with Södra until the beginning of the next year to accompany the transition.

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Norske Skog appoints new Managing Director for Skogn

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Norske Skog has appointed **Mads Eikeland** as Managing Director of its Skogn mill in Norway. He will take over from **Håvard Busklein** and assume his new position on 1 September 2026. Mr Eikeland has served as Norske Skog Skogn's CFO since 2022.

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Dvi presents survey on what Germans expect from packaging

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The German Packaging Institute (Dvi) has published the results of its survey on what Germans expect from and how they rate their packaging. The survey was conducted in May 2026 by market research company Innofact.

1,006 respondents were invited to select the five most important functions of packaging from a list of 13 aspects. The top five positions were occupied by the aspects recyclability (48 per cent), efficient use of packaging (40.3 per cent), ensuring hygiene (37.6 per cent), minimising environmental impact (36.1 per cent) and reusability (33.3 per cent). These were followed by the ease of opening, use and resealing, product protection, extending shelf life, the provision of clear disposal instructions and the recycled material content. The least important were the aspects of providing information, be visually appealing and the products' easy identification on the shelf.

The respondents were also asked to rate their top five priorities between one and five. "Only a slim majority of respondents (52.5 per cent) rate the ease of opening, use and resealing as good or very good. While just 12.9 per cent consider packaging to perform poorly or very poorly in this regard, that still falls short of our industry's ambitions," says Natalie Brandenburg, Dvi's managing director.

Ms Brandenburg identifies a second priority area for the industry in communication: "Only 35.6 per cent of respondents rate the efficient use of packaging materials as good or very good. This is the lowest score among all 13 aspects and is genuinely concerning, because the reality is quite different. Today, significantly less material and fewer resources are required to package products than in the past. As an industry, we need to communicate this progress much more clearly."

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German paper association criticises EU Commission for cost burden created by ETS benchmarks

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German paper association Die Papierindustrie (DPI) claims that new ETS (Emissions Trading System) benchmarks lead to a substantial reduction of free CO₂ allowances, imposing additional annual costs of around €140m on the German pulp and paper industry. These funds were needed for urgently required transformation investments and aggravated the industry's financial situation even further, the association said.

According to DPI, the benchmarks are based on flawed methodology and must be urgently revised as part of the upcoming ETS review. Hans-Christoph Gallenkamp, DPI President, complains about the fact that the update deprives companies of the resources needed for their transformation while simultaneously undermining the economic basis for recovering investments already made.

The statement published by DPI is a reaction to the resolution taken by the European Commission on updated ETS benchmarks.

From the industry's viewpoint, the core problem lies in the benchmark calculation methodology. The benchmarks are based on installations with very low fossil emissions, which are often characterised by highly specific operating conditions. In particular, extensive use of biomass distorts the results, the association says. However, these conditions are not present at all industrial sites in Europe, claims DPI. In addition, the underlying data lack transparency, making it difficult to fully understand the technological bases of the benchmarks. As a result, many installations are faced with target values that are simply unattainable, leading to systematic distortions in the allocation of free allowances, the association concludes.

DPI criticises the fact that the Commission seems to have failed to take the industry's concerns voiced during the consultation into account. According to the association, key prerequisites for industrial transformation are still lacking, particularly competitive energy prices and adequate infrastructure. Under these circumstances, the new benchmark values further increase the economic pressure on Europe's production plants, it says. "If companies want to electrify their production processes but the required grid connection will not be available for many years, they are effectively being penalised for structural shortcomings in public policy and infrastructure development," Mr Gallenkamp said.

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European paper sack industry continues to show slight growth in 2025

Talks at 2026 Eurosac Congress shaped by the impact of EU regulations

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After the European paper sack industry increased its sales volume in 2024, the positive momentum also continued in 2025. Deliveries by paper sack producers rose by 2.7 per cent to 5.69 billion units last year. According to Eurosac, growth was primarily driven by the segments of building materials, excluding cement (+2.2 per cent), food products (+5.4 per cent) and milk powder (+6.3 per cent). Italy remained the largest market, followed by Germany and Turkey.

In contrast, results were mixed in the first quarter of 2026, with overall deliveries declining by 1.4 per cent. At the same time, the building materials segment continued to grow, while milk powder also recorded increases across all markets. According to Eurosac, a similar trend was observed in the United States, where domestic paper sack deliveries grew by 2.2 per cent in 2025 before declining by 3.6 per cent in the first quarter of 2026.

2026 Eurosac Congress puts focus on EU regulation

The above figures were published by the federation on the occasion of this year's Eurosac Congress held in Bordeaux from 28 to 30 June. More than 160 experts from the European paper sack industry met at the event held under the motto "Turning regulation into opportunities". "Regulatory, economic and geopolitical developments are creating unprecedented complexity for our industry," said Eurosac President Alessandro Selmin, who was re-elected president for another two-year term.

The federation says the motto of the congress was also reflected in discussions on Europe's evolving regulatory framework. Roberta Colotta, who works for Flexible Packaging Europe, highlighted how the EU's Packaging and Packaging Waste Regulation (PPWR) was accelerating the transition towards a more circular economy and creating new opportunities for sustainable packaging solutions. She explained that paper sacks were already on a good path to deliver many of the characteristics that the regulation sought to promote, including recyclability, and the efficient use of resources.

While Colotta focused on regulatory developments, Bernard Lombard, Trade & Industrial Policy Director at Cepi, broadened the perspective with insights into the geopolitical and trade developments shaping Europe's pulp and paper value chain. He underlined the importance of maintaining a competitive and resilient European industry committed to fair competition in an increasingly complex global environment with significantly shifting trade flows.

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US Ambassador to the EU says EUDR simplification package is a failure

Andrew Puzder reproaches EU for selective protectionism

📌 **EUWID +** 01 July 2026 | ⌚ ~ 3 min | [Published in issue 27/2026](#)

In a recent statement dated 24 June, Andrew Puzder, US Ambassador to the European Union, said that the EU Commission's simplification package for the EU Deforestation Regulation (EUDR) was a failure. He called on the EU Parliament and Council to reject the simplification proposals submitted by the Commission and to urge the Commission to come up with legislation that actually worked.

Mr Puzder said the EUDR was causing substantial compliance costs for consumers and companies alike. In his view the regulation was delivering negligible environmental benefit if applied to countries that do not post any environmental deforestation risks. The US Ambassador referred among others to the agreement on trade between the EU and the United States, in which the EU recognised that the US poses only negligible risk to global deforestation. He also emphasised that the EU undertook to take concerns voiced by US companies into account that were affected by the EUDR. This was meant to avoid negative consequences for trade between the United States and the European Union.

EU Commission denies that US has a special status in the implementation of the EUDR

Under the EU's country benchmarking system, which classifies countries around the world into low-, standard-, and high-risk categories for the purposes of the EUDR, the Commission designated the United States as "low risk", placing it in the same category as the EU member states and the United Kingdom. At the same time, in response to a EUWID inquiry in late summer 2025, the Commission rejected speculation that the United States would be granted preferential treatment in the implementation of the deforestation regulation as part of the agreement on tariffs.

In his statement, the US Ambassador now criticised that in accordance with the current EUDR criteria, companies from the United States would be subject to the same regulatory requirements than companies from "high-risk" countries. He claimed that this would pose an unnecessary burden on trade.

In his view a fix could be to exempt countries that pose a negligible risk to global deforestation from the EUDR's requirements. According to Mr Puzder, this would redirect the EUDR controls to those areas where they are required and simultaneously encourage high-risk countries to reduce deforestation risks – while simultaneously preventing negligible risk companies and EU consumers from unnecessary costs.

At present there is no such category as "negligible risk" in the country benchmarking system. Nor is the frequently demanded "zero-risk category" currently planned. However, under Article 10 of the EUDR, the risk of deforestation may, under certain conditions, be regarded as negligible ("negligible risk") by operators as part of their overall risk assessment.

Costs remain high for non-EU companies, Ambassador says there is "double standard"

While, in the US Ambassador's view, the Commission's simplification package dated May 2026 absolutely holds out the promise of cost reductions, the Ambassador still has reason to question the entire package. According to Mr Puzder, a major share of the projected cost savings would stem from postponed deadlines and reduced compliance obligations, primarily within the EU, rather than from any relaxation of core extraterritorial requirements imposed on suppliers outside the EU. At the same time, the US side accuses the EU of applying blatant double standards in its simplification measures, arguing that they primarily benefit EU-based small and medium-sized enterprises (SMEs) while failing to provide equivalent relief to non-EU players.

In conclusion, the US Ambassador explained that this was no real simplification but selective protectionism. According to him, this was exactly the kind of non-tariff trade barrier that the framework agreement was designed to eliminate.

EU Commission submitted simplification proposals in early May

On 4 May, the European Commission published its report on the simplification of the revised EUDR, accompanied by a series of additional measures aimed at ensuring the regulation's smooth and effective implementation. The key message was that the deforestation regulation would remain unchanged, with no plans to reopen the legislative text. The implementation timeline, as agreed during the trilogue negotiations that resulted in a further postponement at the end of 2025, was also to remain unchanged.

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British government steps up action to tackle illegal deforestation

📅 EUWID + 01 July 2026 | ⌚ ~ 2 min | [Published in issue 27/2026](#)

The UK government is set to introduce long-awaited rules designed to prevent products linked to illegal deforestation from entering the market in Great Britain (England, Scotland and Wales). The Department for Environment, Food & Rural Affairs (Defra) said legislation will be brought forward under the Environment Act 2021, with a public consultation on the detailed rules expected later this year.

The new regime will require businesses that use or place on the market in England, Scotland and Wales certain “forest risk commodities and wood products” to carry out due diligence to ensure that the products have not been produced on land that was illegally deforested under the laws of the country of origin. Companies will also be required to maintain records and report on their due diligence activities.

To maintain Northern Ireland’s unique dual market access to both the UK Internal Market and the EU Single Market, the EU Regulation on Deforestation-Free Products (EUDR) will apply in Northern Ireland in phases starting 30 December 2026. To minimise regulatory divergence and reduce compliance burdens, the upcoming consultation will propose that the Great Britain regime covers the same commodities and underlying information requirements as the EUDR.

According to the UK government, this approach is intended to reduce “duplication of business burdens and disincentives to trade” for businesses operating in the UK while helping exporters to the EU meet comparable due diligence and traceability requirements.

Andrew Opie, Director of Food & Sustainability at the British Retail Consortium (BRC), welcomed the announcement, saying retailers had long called for UK deforestation legislation and supported alignment with the EUDR to avoid unnecessary costs and complexity. However, with the EUDR due to apply in Northern Ireland from the end of the year, he urged the government to take a pragmatic approach to enforcement to minimise disruption for businesses and consumers.

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Wheat starch prices climb again as the third quarter gets underway

Corn starch prices follow suit / Potato starch in plentiful supply

📄 **EUWID +** 01 July 2026 | ⌚ ~ 4 min | [Published in issue 27/2026](#)

The mood among manufacturers of starch products remains subdued. Even with a second consecutive price increase now looming large for native cereal starch, market players are showing little to no satisfaction. Only rarely are representatives of the starch industry describing the latest price talks as “successful.”

Despite strong pushback from some buyers, the tendency towards price increases was visible fairly early in price negotiations for wheat and corn starch for July and Q3. Talks revolved around the question of how much prices would rise rather than whether this would happen in the first place. However, starch manufacturers have rarely achieved their stated targets in full. There is now the prospect of stemming the losses, starch industry insiders told EUWID, adding that they could still not make any money with native wheat starch.

Wide spectrum of prices in Q2

At the end of June, EUWID sources unanimously reported that talks about prices in Germany and neighbouring countries were in their final stages. Depending on the starting level, the outcomes varied from minor corrections to hikes of up to €40/t. Experts attributed these differences to the results of supply agreements negotiated for the second quarter in particular. Buyers who negotiated relatively late at the quarter's end had to pay more than those who locked in pricing in mid- to late March because of cost hikes in the wake of the war in Iran.

Experts told EUWID that second-quarter price talks had seen considerable movement, although they failed to yield noticeable mark-ups across the board. As a result, large amounts of native wheat starch could still be obtained for less than €400/t. Other buyers confirm prices of €410-420/t. In some parts of western and southern Europe, sources also quoted prices higher than this. It was not unusual for native maize starch prices to be more than €20/t above this level.

Starch producer say they need to catch up and increase their prices

In light of cereal starch manufacturers' demands in the latest round of talks, prices increases for native cereal starch might sum up to €40-50/t so far this year.

While a relatively wide spectrum of prices applied for native wheat starch in the second quarter, prices are expected to converge again a little in the third quarter. A few prices are expected to increase by up to €40/t. Deliveries from July onwards should not cost less than €430/t, starch industry representatives remarked. Sources frequently quoted prices up to €440/t or above €450/t for medium amounts.

For its part, the market for native corn starch is displaying considerable differences, depending on the region and user segment. In Central Europe, corn starch production is increasingly geared towards the needs of the pharmaceutical and food industry. In

recent years, there has been a trend in the paper industry to switch to native wheat starch. The Italian paper market remains a special case. Insiders pointed out that demand for native corn starch remains substantial in certain parts of the sector, such as the corrugated board industry.

Market players consistently reported that a strong trend towards substitution was already in the rear-view mirror for potato starch, with this grade now only used in the paper industry in isolated applications. Sources also continued to report the existence of very cheap spot lots.

Consolidation pressure remains intense

Starch plants feel that their current situation is only marginally better and remain sceptical about the outlook for the month ahead. They continue to view the environment as uncertain.

On a positive note, starch companies were said to have good order books in most cases. Things were slowly getting better, insiders confirmed. Paper mills from the packaging sector are reported to have demonstrated decent ordering activity in recent months. As a rule, starch plants have enjoyed consistently brisk demand for starch products since the end of March. In isolated cases, demand had reportedly cooled a little in May. Order volumes had declined a little, something that was due not least to seasonal effects.

The overall situation thus remains challenging for all parties. Both starch producers and the paper industry are bemoaning inadequate margins against a backdrop of high costs. Considerable volatility in cost components, especially for energy, continued to be a source of uncertainty. Companies are at least sceptical about the prospect of any sustained easing in transport and logistics costs.

Many companies are concerned, noting that their results have often been “too bad for too long.” Insiders noted that there were limits to measures to improve efficiency and optimise operations. Recently, talk of job cuts had been heard at many starch producers, while closures were continuing in the paper industry.

EUWID Price Watch Western Europe Native Starch			
Second quarter 2026			
Prices in € per tonne	Second quarter 2026		Second quarter 2025
Potato starch	650	850	880 - 1,100
Corn starch	425	460	430 - 480
Wheat starch	390	440	420 - 470
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Label paper prices increase in Q2 and could climb again in Q3

Only few price hike announcements so far / Producers operating at full capacity

📰 **EUWID +** 01 July 2026 | ⌚ ~ 3 min | [Published in issue 27/2026](#)

In late June, producers of label paper reported continued very good capacity utilisation in the German market. Demand in the second quarter remained relatively stable at the high level seen in the first three months of the year, they told EUWID. Once again, demand was reportedly stronger for wet strength and alkali-resistant label paper than for non-wet strength grades. This is partly attributable to the closure of paper producer Feldmuehle at the end of 2025, but seasonal factors could also be playing a role, say producers.

Nevertheless, there was no mention of a shortage of wet strength and alkali-resistant papers. "We have always been able to ship out the budgeted volumes," emphasised one label paper producer. A different supplier said: "We have the potential to deliver more, also on short notice".

Yet, converters say that the absence of Feldmuehle's capacities has definitely resulted in some paper suppliers experiencing bottlenecks in recent months. Consequently, suppliers occasionally expressed a desire to postpone some deliveries. By now, the tense situation has eased. "The pie has been divided up," commented one label printer. In addition, a relevant player has announced a considerable expansion of its production capacities for wet strength label paper at a plant in Germany.

At the time of the market survey in the last full week of June, delivery times for label paper were said to be 4-6 weeks, though the upper figure usually applied only for wet strength and alkali-resistant grades.

Envisaged price increase for Q2 could not be fully implemented

After several quarters of price stability, all relevant paper producers had announced price hikes for the second quarter of 2026. Label paper producers were aiming for either specific amounts (+€60/t) or percentage increases (between 8-10 per cent or 7-8 per cent) for deliveries as of 1 April.

Market players report that producers were unable to implement the full amount of the envisaged hike. In most cases, the two sides agreed to a mark-up of €40/t. For non-wet strength paper, in some cases only €30/t was possible.

And one paper producer went a step further and announced a new price increase of €65/t for deliveries as of 15 April. This was apparently implemented, but not for all customers and not with the announced timing.

Paper industry representatives are already expressing a wish to raise prices again in the third quarter. So far, though, only one company has made an official announcement. It wants to lift prices by €100/t for non-wet strength label paper and by €130/t for wet strength and alkali-resistant papers for deliveries from 1 July. The producer argued that the price hike announced as of 1 April had not been sufficient to fully compensate for cost developments. The company is flexible when it comes to the validity of the new prices: Agreements for just one quarter as well as until the end of the year are reportedly possible. Besides that official announcement, at least one other price announcement for customers is circulating on the market, EUWID was told. In this case, the demands are more modest than those of the competitor and are applicable for deliveries from 1 July until 30

September. The company reportedly said that a steep rise in pulp prices as well as higher costs for auxiliary materials, transport and energy made an adjustment necessary. In late June, negotiations between paper producers and converters for the third quarter were mostly still ongoing.

EUWID Price Watch Germany Label Paper			
Second quarter 2026			
Prices in € per tonne free delivered	Second quarter 2026	First quarter 2026	Second quarter 2025
Wet-strength and alkali-resistant 70-80 g (reels)	2,290 - 2,420	2,250 - 2,380	2,250 - 2,380
Non wet-strength 70-100 g (reels)	2,070 - 2,180	2,030 - 2,150	2,030 - 2,150
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Velvet Care to expand tissue converting capacity

EUWID + 29 June 2026 | [Noureddine Guimouza](#) | ~ 1 min | [Published in issue 27/2026](#)

Polish tissue paper and products manufacturer Velvet Care is pressing ahead with the development of its new converting site in Sulęcín in western Poland, close to the German border. The new site will be operated through its subsidiary Velvet West and is scheduled to start in the second half of 2026, Velvet Care says.



Symbolic image. Poland's Velvet Care will set up a new tissue converting site close to the border with Germany.

Velvet Care has not yet provided details of the planned production capacities, but the company refers to a modern machine park with high operating standards.

Velvet West was established in May 2025. At the same time, construction began on a new converting site in Sulęcín. The project is located within the Kostrzyn-Słubice Special Economic Zone and forms part of the [company's expansion strategy for the markets of Central and Western Europe](#).

According to a statement by Gessel, the business law firm involved in the transaction, last year Velvet Care acquired 40,000 m² of production and storage hall purchased from a private owner, as well as nearly 12 ha of undeveloped land acquired as three separate parcels from public entities within the Sulęcín Special Economic Zone. Together, these assets form the foundation for the company's new manufacturing facility.

With the Sulęcín project Velvet Care will add another converting site, in addition to its existing sites run by Private Label Tissue in Poland, and Moracell in the Czech Republic. At the heart of the group's operations is the integrated tissue mill in Klucze, which operates four tissue machines with a total production capacity of 210,000 tpy.

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Reno De Medici extends forbearance agreement to June coupon as recapitalisation talks continue

EUWID + 26 June 2026 | Igor Dugandžić | ~ 2 min | Published in issue 27/2026

Reno De Medici has extended its forbearance agreement with bondholders of FRSSNs to cover the non-payment of interest due on 15 June 2026, as negotiations over a broader recapitalisation of the group's financial indebtedness continue. RDM said the extension is intended to maintain financial and operational stability while the recapitalisation is finalised, adding that production and deliveries continue as normal.



The Milan-based recycled cartonboard producer Reno de Medici (RDM), a company of the US investment firm Apollo Global Management, announced in mid-June that the existing forbearance agreement, originally entered into in March, remains in place and has now been extended to include the June interest payment date on its €600m floating rate senior secured notes (FRSSN) due 2029. The extension was agreed to ensure financial and operational stability while the terms of the planned recapitalisation are finalised, RDM said.

According to RDM, it is continuing positive discussions with holders of the FRSSNs and with lenders under its revolving credit facilities agreement, which matures in 2028. Negotiations regarding the recapitalisation of the group's financial debt are well advanced, it said.

The group also stressed that operations are continuing normally. "There is no operational disruption, and production and deliveries are proceeding as usual", RDM said.

The [original forbearance agreement was signed with holders representing more than 70 per cent of the outstanding principal amount of the notes](#). It related to the non-payment of interest accrued on the notes at the 16 March 2026 interest payment date.

Apollo had not responded by the time of publication to a request for comment on the timeline for the ongoing debt restructuring and the future ownership and control structure.

RDM responds to market rumours and stresses normal business operations

In early June, Bloomberg and Italian financial news service Teleborsa reported, citing people familiar with the matter, that Apollo was expected to hand control of Reno de Medici to its bondholders as part of a debt restructuring. The development prompted further speculation among market participants in the folding cartonboard segment about the group's financial and operational future.

In response, RDM sought in its statement of 8 June to calm concerns and counter emerging rumours by referring to “ongoing discussions with creditors”. RDM said that all of the group’s activities and its sales network were operating without interruption and as usual. It also stated that payments to employees and suppliers, as well as all contractual obligations, were being met in full and on time.

“Our stakeholders can continue to rely on us to the same standards of quality and reliability they expect,” the company said in the statement.

Milan-based Reno de Medici operates eight board mills in Europe and four sheeting centres in Europe and the US. In 2025 RDM produced just over 1 million t of recycled cartonboard and reported sales revenues of €739m.

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Stora Enso's Andreas Birmoser becomes Pro Carton president

25 June 2026 | 🕒 ~ 1 min | [Published in issue 27/2026](#)

Andreas Birmoser, Executive Vice President, Cartonboard at Stora Enso, has been appointed president of Pro Carton, the European Association of Carton and Cartonboard Manufacturers. He succeeds Michele Bianchi, CEO of RDM Group, who had served as president for the past four years.



Andreas Birmoser, new President of Pro Carton

Mr Birmoser has been a member of the Pro Carton board since 2023 and has more than 20 years of experience in the forest products and cartonboard industry. In his current role at Stora Enso, he is responsible for the group's global cartonboard business. Previously, he held senior management positions including CEO of Veracel Celulose in Brazil.

Commenting on his appointment, Mr Birmoser said: "It is a real honour to take on the role of President of Pro Carton, especially at such an important moment for our industry. As businesses navigate economic uncertainty, evolving regulation and changing market expectations, no company can succeed in isolation.

Pro Carton has a vital role to play in bringing our industry together, strengthening our collective voice and ensuring we are a trusted partner for policymakers and stakeholders across Europe. I look forward to working closely with our members to support sustainable progress and continue building a strong future for the folding carton and cartonboard industry."

Horst Bittermann, Director General of Pro Carton, said: "We are delighted to welcome Andreas as President of Pro Carton. Having served on the Pro Carton Board since 2023, he brings a deep understanding of both our association and the challenges and opportunities facing the European cartonboard industry.

His strategic leadership and collaborative approach make him well placed to guide Pro Carton through the next phase of its development. We look forward to working together to strengthen our industry's voice, support our members and promote the value of fibre-based packaging across Europe."

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UPM and Andritz cooperate on pilot plant for tissue producers

25 June 2026 | 🕒 ~ 1 min | Published in issue 27/2026



Representatives of Andritz and UPM in Graz

UPM Pulp and Austrian technology group Andritz have announced the signing of a multi-year cooperation agreement aimed at supporting tissue manufacturers in the development and optimisation of new tissue products and production processes.

The partnership gives tissue producers access to pilot-scale trials at Andritz's Tissue Innovation and Application

Center (TIAC) in Graz, Austria, where fibre and process solutions can be tested and tailored to individual production requirements.

As part of the agreement, UPM's eucalyptus hardwood pulp, UPM Euca, will serve as the standard pulp for all customer and internal trials conducted at the facility. The pilot facility supports dry-crepe, structured and Through-Air-Drying (TAD) tissue manufacturing technologies.

"Bringing a new raw material or process concept to tissue production carries real risk. Trialing on a live production machine is costly and disruptive. This is where our tissue pilot plant comes to play," said Franz Harrer, tissue expert at Andritz, adding that the facility helps reducing investment risks. "Together with UPM's pulp expertise, we can help tissue manufacturers innovate efficiently and faster," he concluded.

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Smurfit Westrock completes withdrawal from London Stock Exchange

25 June 2026 | 🕒 ~ 1 min | [Published in issue 27/2026](#)

Smurfit Westrock has completed the cancellation of its secondary listing on the London Stock Exchange (LSE), leaving the New York Stock Exchange (NYSE) as the group's sole listing venue.



The last trading day on the LSE was 19 June, with the delisting taking effect on 22 June.

According to a shareholder FAQ published by the company, the decision follows a review of its listing structure. Smurfit Westrock said the vast majority of trading in its shares already takes place on the NYSE, while maintaining the LSE listing entails additional costs as well as regulatory and administrative obligations. Consolidating trading on a single exchange is expected to provide greater liquidity and trading efficiency.

The delisting does not affect the group's operations or its status as an Irish-incorporated company.

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Folbb's cartonboard mills in Baiersbronn and Eerbeek file for insolvency

📍 EUWID + 24 June 2026 | [Konstantin Stoll](#) | ⌚ ~ 2 min | [Published in issue 27/2026](#)

Baiersbronn Frischfaserkarton, the German subsidiary of folding boxboard producer Folbb, has run into financial difficulties. At the end of June, the company filed for the opening of insolvency proceedings with the local court of Rottweil in southwestern Germany.



According to law firm Brinkmann & Partner, production at the cartonboard mill in Baiersbronn will continue without restrictions for the time being.

Talks with customers, suppliers and other stakeholders aimed at ensuring the company's operational stability are said to have already begun. The court has appointed Jan Markus Plathner as provisional insolvency administrator, supported by Christoph Enkler and Sebastian Netzel.

In a statement, Brinkmann & Partner cited persistently high energy costs, structural overcapacity in the market and a challenging business environment as the main reasons for the insolvency filing. The Baiersbronn mill, like many other companies in the European cartonboard industry, had been affected by these conditions, the law firm added. Despite operational cost-cutting measures, the company had been unable to sustainably stabilise its liquidity position.

At the same time, Folbb's second subsidiary Folding Boxboard Eerbeek in the Netherlands has also filed for insolvency, the provisional insolvency administration confirmed to EUWID. According to the Dutch insolvency register, a provisional suspension of payments had already been granted on 24 June.

Investor process is being initiated

An international investor process will now be initiated with the objective of finding buyers for both production sites. In addition, a detailed assessment of the companies' financial situation will be conducted. The goal was to continue operations and achieve a long-term restructuring of the business, the law firm said.

To secure employee salaries, Mr Plathner has reportedly already arranged insolvency wage pre-financing for June, July and August.

At the Baiersbronn mill, Folbb operates one board machine producing folding boxboard grades GC 1 and GC 2 with a capacity of around 95,000 tpy. The Eerbeek mill in the Netherlands can produce up to 150,000 tpy of folding boxboard.

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