

Domsjö Fabriker plans to expand LGB production in Sweden

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Swedish speciality cellulose and bioproducts manufacturer Domsjö Fabriker is planning to expand its biorefinery at the High Coast Innovation Park in Örnsköldsvik, Sweden. The company intends to convert biogas from industrial processes at the site into liquefied biogas (LGB). The fuel is primarily intended to replace fossil diesel in heavy transport. Commissioning of the plant is scheduled for the fourth quarter of 2028.

To support the project, Domsjö Fabriker has applied for funding under Klimatklivet, Sweden's national climate investment programme. Implementation of the project depends on approval of the grant as well as the required permits, including environmental and building permits.

Domsjö plans to upgrade and liquefy biogas generated in the biorefinery's industrial processes. The LGB will then be used as fuel sold on the open market. At full capacity, the plant is expected to supply around 100 GWh of liquefied biogas per year, replacing an equivalent amount of fossil diesel. At a later stage, biogas from other companies located in the industrial park could also be converted in the facility.

The project is intended to improve access to fossil-free fuels in Sweden. The country was currently highly dependent on imported fuels, Domsjö said. Local production of liquefied biogas could contribute to increased regional self-sufficiency and stronger supply security. This was particularly important for heavy transport, such as trucks and shipping, where moving away from diesel was more challenging than in the passenger car sector, the company added.

Domsjö has selected Adven as its infrastructure partner for the project. The company, which specialises in energy, water and side-stream infrastructure solutions, has already been involved in the project's development and design phase.

Domsjö, a company of India's conglomerate Aditya Birla, produces different grades of specialty pulp products, including dissolving pulp for textile and technical applications, specialty cellulose for medicinal and food industry applications, as well as microcrystalline cellulose (MCC).

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JK Paper starts commercial production at new BCTMP plant

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The new bleached chemi-thermomechanical pulp (BCTMP) line of Indian pulp, paper and board producer JK Paper is now up and running. The company announced that commercial production at the plant, which was installed at the Fort Songadh mill in India, had started on 30 June. The fibre line was delivered by Valmet and has a production capacity of 400 tpd of BCTMP for the production of lightweight coated board.

JK Paper manufactures several paper and board products, including printing and writing paper, cartonboard and corrugated case material. The company runs three integrated production sites in Songadh and Gujarat, both located in the west of India, as well as Kagaznagar in central India. They have a total production capacity of 800,000 tpy.

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Van de Velde boosts finances, invests in Poland and Türkiye

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Van de Velde Packaging Group has strengthened its financial position for further growth. Working in partnership with the Luxembourg-based investment firm and shareholder Kartesia, the Belgian packaging group now has access to an expanded capital structure of roughly €130m. The supplier of cartonboard and corrugated board packaging said that it now had a solid foundation to advance its international growth ambitions.

In 2025, Kartesia deepened its partnership with the Belgian firm as an investor by making an injection of additional capital. According to earlier reports, the investment company had first taken a stake in Van de Velde in 2021.

The latest agreement makes a further €15m available, giving the group scope for additional investment projects. In this context, Van de Velde reported having already completed new installations at its facilities in Poland and Türkiye. The packaging group added that a new printing press at its Turkish site was now fully operational. Van de Velde did not disclose any further details. In Türkiye, the company operates a facility in Silivri, to the west of Istanbul.

The packaging manufacturer said that it runs 17 sites across eight countries. With a workforce of more than 1,300 employees, Van de Velde manufactures folding cartons, paper cups, displays and corrugated board packaging for both the food and non-food sectors.

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Saica commissions biomass boiler in Nogent-sur-Seine

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Spanish Saica group has commissioned a new biomass boiler at its French corrugated case material mill in Nogent-sur-Seine. According to the company, the boiler replaces existing gas boilers and is expected to significantly reduce the site's CO₂ emissions. The investment is valued at €86m.

The new biomass boiler has a capacity of 49.75 MW and will generate around 300 GWh of energy annually, covering 90 per cent of the plant's steam requirements, with the remaining 10 per cent generated by a biogas boiler, Saica writes.

The system will process waste wood and pulper and fibrous rejects from the paper mill process. In addition to the new biomass boiler, the project thus also included installation of a waste wood processing plant, a recovery plant for by-products from recovered paper cleaning and a 5.5 MWe steam turbine producing 37 GWh per year.

The company emphasises that the project will not only improve the mill's environmental performance and save energy costs, but will also allow more than 97 per cent of waste and by-products from paper production to be directly utilised on-site.

Following commissioning of the new boiler, Saica now runs biomass plants at all its three French paper mills. The plant in Vénizel has been in operation since 2019. This was followed last year by a new biomass boiler in Champblain-Laveyron, which also replaced an older gas boiler.

The Nogent-sur-Seine mill produces recycled corrugated case material on one machine with a capacity of 270,000 tpy and employs more than 150 persons.

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UK competition authority clears Suzano/Kimberly-Clark tissue joint venture

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The UK's Competition and Markets Authority (CMA) has cleared the proposed \$3.4bn (€3.0bn) joint venture between Brazilian pulp producer **Suzano** and US consumer goods group **Kimberly-Clark**. The authority has decided not to refer the transaction to an in-depth Phase 2 investigation, removing one of the final regulatory hurdles for the deal. The joint venture, announced earlier this year, will combine Suzano's global tissue business with Kimberly-Clark's international consumer tissue operations. The CMA's decision follows the European Commission's unconditional approval of the transaction. With the UK review now completed, the companies remain on track to complete the transaction in mid-2026, subject to the remaining customary closing conditions.

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Valmet completes Severn takeover

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Valmet has completed the acquisition of **Severn Group**, a supplier of industrial valves and flow control solutions. The acquisition, which was announced on 22 December 2025, covers all three Severn divisions: Severn Glocon, ValvTechnologies and LB Bentley. Valmet announced that Severn will be integrated into Valmet's Flow Control business area. In 2025, the company generated net sales of approximately €215m and an Ebitda margin of approximately 16 per cent. The transaction was valued at \$480m on a cash- and debt-free basis (approximately €410m).

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Leadership change at Norske Skog Golbey

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Norske Skog Golbey's long-standing President, **Yves Bailly**, will retire this month. Norske Skog's CEO **Geir Drangslund** will temporarily take over his position. Supported by Christoffer Bull, currently Senior Vice President Business Development at Norske Skog, he will assume the leadership of the mill until December 2026.

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Koehler Paper to increase prices for recycled papers

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Koehler Paper, part of Koehler group, intends to increase prices for recycled graphic papers by 6 per cent, effective for deliveries from 1 September 2026. The company based in Germany attributed the price adjustment to rising production costs and increasing pressure on supply chains. Despite efficiency measures, the company said the increase was needed to safeguard supply and maintain product quality.

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Nabu study calls for new regulation of paper-based composite packaging

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Paper-based composite packaging is often regarded as an alternative to plastic packaging. However, the German environmental organisation Nabu warns that paper-based packaging solutions are not automatically more environmentally friendly.

A study carried out by Propakma on behalf of Nabu shows that it is especially paper packaging for moist, liquid or greasy products that cannot be recycled in the conventional recovered paper cycle, or only to a limited extent. According to the findings, the decisive factor is not the share of paper contained but rather the actual recyclability of the respective type of packaging.

According to a study summary, Germany recorded just under 520,000 t of waste made up of paper-based composite packaging in 2023, of which 167,000 t consisted of liquid packaging and around 353,000 t of other paper-based composite packaging. From a technical perspective, these are paper-based packaging materials that include at least one permanently bonded layer of another material, such as plastic, aluminium or wax. Under German packaging legislation, paper-based packaging is classified as a paper composite if its paper content does not exceed 95 per cent.

Paper content alone says little about actual recyclability

From Nabu's perspective, the current 95/5 rule poses a fundamental weakness. Packaging with a paper content of at least 95 per cent paper may be disposed of in the blue bin for recovered paper, while paper-based composite packaging must be collected in the yellow bin, or as lightweight packaging. However, the study arrives at the conclusion that material content alone provides only limited information about actual recyclability. As a result, a couple of packaging types that would have to be disposed of in the yellow based on their material composition alone could technically actually be suitable for the paper recycling loop. Conversely, packaging with only a low content of non-paper materials is currently collected in the blue bin for recovered paper, despite the fact that it has the potential to disrupt the paper recycling process.

According to Nabu, this problem is compounded by the fact that Germany lacks sufficient recycling infrastructure for paper composites collected in the lightweight packaging stream.

While a specific process has been established for liquid packaging board that allows the recovery of fibres for new packaging, Nabu argues that recycling of the paper fraction from lightweight packaging remains inadequate. The fibres recovered from this stream therefore cannot currently be used in food-contact packaging. As this is a key prerequisite for the use of recovered paper in Germany, Nabu says there are now no facilities left that recycle paper and board collected from lightweight packaging.

In the study summary, Nabu also refers to various surveys on the incorrect disposal of fibre-based composite packaging. The surveys reveal that at least half of such packaging is falsely disposed of in the blue instead of the yellow bin in Germany.

At the same time, an estimated 45 per cent of the paper fraction from lightweight packaging is considered suitable for collection

in the blue bin. In addition, more than 2 per cent of Germany's residual waste consists of recovered paper from packaging, meaning that this material is lost to recycling. The statutory recycling target for other composite packaging was not met in 2024, when the recycling rate stood at around 62 per cent, reports Nabu. The share of paper-based composites included in this figure is not known.

The laboratory analyses performed as part of the study illustrate the range of issues involved: According to the findings, a bakery bag with a plastic window achieved a fibre yield of 89 per cent and would be recyclable in the conventional paper cycle under the Capi method. Based on its material composition, however, it would have to be disposed of in the yellow bin. In the case of a bag with a glassine window, the fibre yield was higher, but at the same time more adhesive contaminants were present. Beverage cups with a PE coating performed better than those with a PLA coating; however, neither is suitable for disposal in the blue bin.

For frozen food packaging in direct contact with food, the study points to problems caused by food residues and moisture. Wax-coated paper and butter wrappers show, according to Nabu, that theoretical recyclability and industrial practice can diverge.

Nabu calls for sorting instructions and recyclability criteria

Based on these findings, Nabu sets out several demands. In future, the correct disposal route should be determined on the basis of recyclability rather than material composition, the organisation says. It also calls for clear sorting instructions on packaging, stringent EU criteria for assessing recyclability, and a separate, verifiable recycling rate for other paper composites under the German Packaging Law Implementation Act (VerpackDG).

For paper and board collected in the lightweight packaging stream, Nabu calls for recycling capacity to be built up in Germany. The organisation also wants rejects from the recycling process be recovered as materials rather than simply disposed of or incinerated. In its view, manufacturers or distributors should be sanctioned if they incorrectly classify packaging as suitable for the Blue Bin.

As a rule, Nabu advocates using paper composite packaging only sparingly. According to the organisation, plastic packaging should only be substituted where this makes sense from an overall environmental perspective. In view of the inadequate recycling capacities, paper packaging for moist and heavily greasy foods should currently be avoided; liquid cartons are mentioned as an exception.

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Swiss paper industry registers significant decline in output and sales in 2025

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The Swiss paper industry looks back on a challenging year in 2025 characterised by a high level of global uncertainty. Political tensions and divisions within the EU, economic uncertainty in the USA and the ongoing geostrategic rivalry between USA, China and Russia further exacerbated the difficult international environment, according to the Swiss association of paper, board and film manufacturers (SPKF).

The operating conditions for industry remain challenging, especially due to structural factors such as the shortage of skilled workers, demographic change and persistently high energy and production costs. Weak demand in Europe and the strong Swiss franc were also weighing on the competitiveness of export-oriented industries, according to the SPKF. For the paper industry, the situation continued to be characterised by subdued demand and intense competition.

Sales and output of Swiss paper manufacturers		
Company	Annual sales in 2025 (CHF)	Output in 2025 (t)
Cartaseta	n. a.	25,426
Landqart	n. a.	n. a.
Model	358,213,000	424,412
Papierfabrik Netstal	22,721,860	15,802
Perlen Papier	204,800,000	362,068
Swiss Quality Paper	39,141,821	18,905
Tela GmbH	n. a.	45,358
Total paper und board	624,876,681	891,971
APS Altpapier Service Schweiz	70,555,000	344,339
Perlen Packaging	150,283,134	18,350
Total SPKF member companies	220,838,134	362,689
Source: SPKF		

Deliveries and sales of some of the association's member companies matched the level of the previous year. The Model group, which is active in the solid and corrugated packaging sectors, achieved consolidated sales of CHF936m in 2025, reflecting an increase of 8.6 per cent year-on-year. Output volume of corrugated packaging increased by 3.6 per cent compared with 2024. With annual output at 771,000 t of packaging paper, Model group also set a new production record. On average, Model group employed 757 people in Switzerland.

Perlen Industrieholding is strategically realigning its business in response to declining demand for paper. In future, the company will focus on the production of speciality paper for flexible packaging, particularly in food and label applications. As part of this strategy, Perlen has secured production rights for recyclable paper bottles in cooperation with Pulpex. According to the company, the bottles are made primarily from paper fibres, are recyclable and have a lower CO₂ footprint than glass bottles. Production is scheduled to begin in 2027. However, Perlen Papier remains under pressure and cut 60 jobs in 2025 as part of its restructuring. The company's sales fell by almost 15 per cent.

Swiss Quality Paper also recorded a decline in sales of around 14 per cent year-on-year but the level is still healthy after a significant increase in the previous year.

According to the SPKF report, Swiss paper mills delivered 904,331 t of board and paper in 2025, down 5.8 per cent year on year. Newsprint deliveries fell by 13.4 per cent to 267,469 t while figures for other graphic papers declined by 13.2 per cent to 99,260 t. In contrast, sanitary paper, packaging paper and other paper grades remained broadly in line with the previous year.

Peter Henz elected as President of the SPKF for another term of office

At the sixth SPKF general assembly held on 30 June 2025, attendees elected Peter Henz for another term of office as President. Ivanela Odermatt, Chief Human Resources Officer of Perlen Packaging AG, was newly elected to the executive board.

Paper deliveries by Swiss paper mills						
Grade (t)	2021	2022	2023	2024	2025	Change % 2025/24
Newsprint	339,493	327,363	269,673	308,770	267,469	- 13.38
Other graphic papers	165,215	146,133	101,721	114,318	99,260	- 13.17
Sanitary papers	69,955	70,000	72,000	71,000	71,000	± 0.00
Packaging papers	404,181	411,669	396,781	423,580	424,395	+ 0.19
Others	44,885	44,900	41,449	42,629	42,207	- 0.99
Total	1,023,729	1,000,065	881,624	960,297	904,331	- 5.83
Source: SPKF						

Paper consumption in Switzerland						
Product categories (t)	2021	2022	2023	2024	2025	Change % 2025/24
Newsprint	144,604	147,321	132,614	118,951	116,596	- 1.98
Other graphic papers	292,129	285,767	232,100	222,473	202,678	- 8.9
Sanitary papers	147,262	158,035	149,706	161,332	161,643	+ 0.19
Packaging papers	312,786	324,721	294,935	301,555	292,692	- 2.94
Others	40,178	37,246	36,458	33,042	33,512	+ 1.42
Total	936,959	953,090	845,813	837,353	807,122	- 3.61
Source: SPKF						

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European pulp port inventories edge up in May

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Pulp inventories at Europe's key ports rose slightly in May 2026 compared with the previous month, but remained well below the level of the same month last year. Total stocks increased by just over 1 per cent from April to 1.23 million t. Compared with May 2025, however, inventories were almost 20 per cent lower.

The slight month-on-month increase was driven primarily by Italy and Spain, where port pulp inventories rose by 9 per cent and 12 per cent higher, respectively, compared with April. These gains more than offset declines across the other regions.

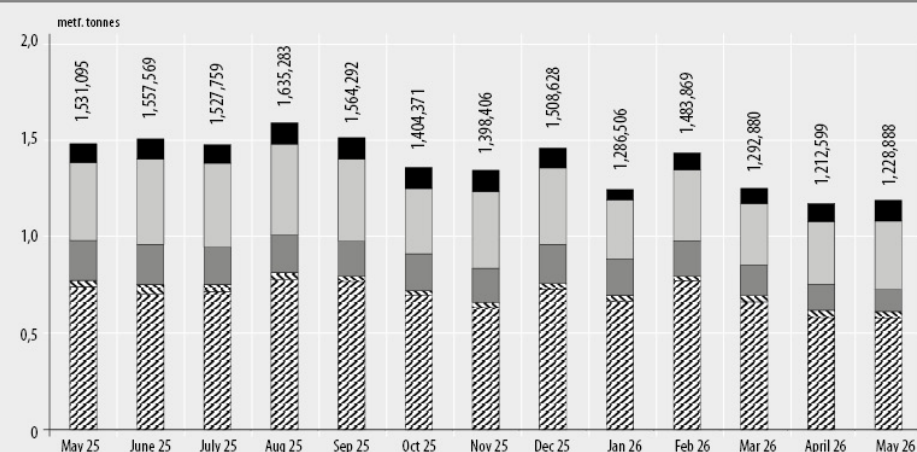
In Germany, pulp inventories were 14 per cent below the previous month's level. This made Germany the market with the sharpest decline among the larger countries, both in percentage terms and in absolute volumes. In the UK, pulp inventories fell by 12 per cent from April, while stocks in the major port cluster covering France, Switzerland, Belgium and the Netherlands (NL/BE/FR/CH) remained almost unchanged from the previous month.

Compared with a year earlier, however, total stocks of woodpulp at European ports are clearly lower. The overall year-on-year decline of 20 per cent was due primarily to lower stocks in the NL/BE/FR/CH port cluster. There, inventories were 22 per cent, or just over 166,000 t, below the level seen in May 2025. Germany also recorded a massive decline of 45 per cent, or around 96,000 t, while inventories in Italy were 12 per cent, or just over 50,000 t, below the level of May 2025.

Only Spain and the UK bucked this negative trend in the year-on-year trend. In Spain, inventories were 10 per cent above the year-earlier level, while in the UK they were 2 per cent higher.

Stocks of woodpulp in European ports

May 2025 - May 2026



	May 26	April 26	May 25
ES	110,508	98,612	100,669
IT	366,150	335,997	416,550
GER	118,422	138,090	214,774
GB	34,404	38,886	33,674
NL/BE/FR/CH	599,404	601,014	765,428
Total	1,228,888	1,212,599	1,531,095

Source: Europulp

Pulp consumption up in May, but still below last year's level

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In May, European pulp consumers again used slightly more market pulp than in April. At almost 845,000 t, consumption was around 4 per cent higher than in the previous month. Consumption of bleached softwood kraft pulp was only marginally above the April level, while consumption of bleached hardwood kraft pulp, at 534,000 t, was around 6 per cent higher.

Compared with the same month last year, however, data from the European pulp consumers' association Utipulp show a slight decline in consumption of just over 1 per cent. This was primarily due to developments in bleached softwood kraft pulp. Here, Utipulp recorded a year-on-year decline in consumption of almost 9 per cent to just under 222,000 t. Consumption of bleached hardwood kraft pulp, at 574,000 t, was about 2 per cent above the level of the same month last year.

The increase in consumption between May and April also led to a slight reduction in inventories at paper mills organised in Utipulp. At 690,000 t, total stocks were 1 per cent below the previous month's level. The decline was particularly pronounced in softwood kraft pulp, where inventories fell by 6 per cent, while stocks of hardwood kraft pulp declined by slightly less than 2 per cent month-on-month.

In the year-on-year comparison, European market pulp consumers held 2 per cent more pulp in stock. Hardwood kraft pulp inventories were 1 per cent higher than in May 2025, while stocks of softwood kraft pulp were down by almost 2 per cent.

As in April, inventories in May were sufficient to cover 26 production days and were thus one day higher than in May last year.

Inventories and consumption of pulp consumers in Europe								
May 2026								
tonnes		UNBLEACHED		BLEACHED / SEMI-BLEACHED			Total	Previous year
		Sulphite & Kraft	Softwood sulphite	Hardwood sulphite	Softwood kraft	Hardwood kraft		
Inventories								
April	2026	8,988	24,025	9,187	223,703	428,666	694,569	699,717
May	2026	9,747	26,920	7,398	210,093	435,758	689,916	676,217
Consumption								
April	2026	6,585	29,340	15,467	219,405	542,621	813,418	790,713
May	2026	6,082	28,458	14,425	221,801	573,842	844,608	856,092
NB: Total and previous year total do not include DIP and CTMP, figures are constantly revised.								
Each national Association has to provide an estimation for 100% of the national volumes out of their samples (from 80% to 100% depending on the countries).								
Source: UTIPULP								

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European pulp market sees another round of lengthy price talks

BEK prices at their peak / First customers call for NBSK price cuts

📌 **EUWID +** 08 July 2026 | [Igor Dugandžić](#) | 🕒 ~ 5 min | [Published in issue 28/2026](#)

Price negotiations for June on the European pulp market were still not concluded in early July. The outcome of the price talks, for bleached softwood pulp in particular, is still pending. For bleached eucalyptus kraft pulp, market participants also report deals concluded at unchanged prices at the previous



month's level, although that level may differ from one buyer to another depending on how the May price talks were settled.

In the view of many market participants, the European bleached hardwood kraft pulp market is now at a crossroads. Not least, this is reflected in the market and price dynamics seen over the past two months. After several successful price rounds since the start of the year, producers met with the first serious resistance from customers in May. In the lengthy negotiations over May prices, which in some cases dragged on until mid-June, suppliers were able to push through only part of their original demands and had to settle in most cases for an increase of \$30/t. Customers who had initially agreed to a \$50 rise, to as much as \$1,430/t, are said to have received credits for payments already made.

The initial idea among a small number of BEK pulp producers to add the remaining \$20 from the May round to June list prices was quickly dropped after the first talks with customers. While suppliers still describe the European market as showing a certain degree of resilience compared with other regions, pulp demand starts easing again after a dynamic phase at the transition from the first to the second quarter. The paper industry itself is feeling a slowdown in demand and in order books and, with a view to the height of summer, is expecting a further easing in activity. Moreover, the planned price adjustments for fine papers, specialty papers, tissue and cartonboard have only partially taken hold in Europe. Paper mills are therefore acting cautiously and remain restrained when it comes to calling off contracted pulp volumes at high prices.

This caution is being reinforced by the recent reduction in BEK pulp prices in China initiated by a few suppliers. Although eucalyptus pulp producers are increasingly trying in their discussions to decouple developments in Europe from those in China, the ongoing demand weakness in Asia and falling selling prices in the world's largest market are causing buyers in Europe to take notice.

Some buyers also point to higher producer inventories worldwide. Since the beginning of the year, producer stocks of hardwood pulp have increased by three or four days. Port inventories in Europe have also recently edged up again. This has been reflected not least in the growing availability of eucalyptus pulp on the European spot market, where offers at \$630/t and \$640/t FCA at the end of June and beginning of July have attracted buyers' attention. Some producers appear more nervous than others and are trying to set themselves apart from the rest with prices even \$20/t lower, one trader commented.

Against this backdrop, some EUWID sources believe that list prices for bleached hardwood pulp have already reached their peak and expect prices to decline in the near future. Others initially expect prices to move sideways at this high level before possibly coming under pressure in August or September.

More capacity management on the softwood pulp market in Europe

The situation is somewhat different for northern bleached softwood kraft pulp (NBSK). There have been no price increases in recent months. Since the last unsuccessful attempt in March, list prices have remained virtually unchanged, mostly at \$1,650/t and, less frequently, at \$1,660/t.

The market in Europe is currently negotiating June list prices for NBSK. As in the previous month, however, the talks are dragging on, and clear results are again expected at mid-month. Suppliers are aiming for another rollover in NBSK prices. Some buyers, by contrast, are calling for price reductions of around \$20/t.

Suppliers assess demand for NBSK differently, ranging from good to merely adequate depending on the end-use segment. What producers continue to see as problematic, however, is the ample supply and the still high inventory levels on the producer side. Pulp manufacturers are also struggling with high fibre wood costs, especially in Central Europe, and thus with what they describe as non-remunerative prices at which many orders are being done for some time now.

Suppliers complain that less and less softwood pulp is being sold under prices agreed in contracts. Customers prefer to source the required volumes on the spot market. Spot prices for softwood pulp in Europe have continued to weaken in recent months. Prices are said to be around the €600/t delivered mark, offering substantial advantages over net prices for contracted volumes.

The paper industry is currently buying readily on the spot market, one trader said. This is part of a strategy to secure cheaper pulp without putting too much pressure on list prices. Some players in the tissue industry are trying in this way to keep list prices under control and avoid triggering rapid declines on the raw material side, so that their own customers do not in turn demand price cuts for jumbo reels, one pulp supplier explained.

Production curtailments and market-related downtime are the preferred tools for many producers seeking to keep the NBSK market under control. In addition to already known temporary shutdowns at some Finnish producers, Mercer has announced that it will extend the maintenance downtime at its Rosenthal mill in Germany to cover the whole of September.

EUWID sources assume that all suppliers have already reduced NBSK output in one way or another and will continue to curtail production. Producers are reviewing their portfolios and asking themselves which other grades are currently seeing better market demand. Following the insolvency of Fibre Excellence in France, some suppliers are reportedly serving the unbleached kraft pulp (UKP) market more intensively. Others are increasing volumes in the fluff pulp or dissolving pulp markets. For more critical market participants, however, this amounts to no more than a drop in the ocean, and they see no way of bringing the market back into balance without permanent capacity closures in Europe.

EUWID Price Watch Pulp Western Europe			
June 2026			
CIF European ports	June 2026 ¹⁾	May 2026 ²⁾	June 2025
Bleached softwood pulp			
Softwood kraft			

Softwood kraft			
from Scandinavia and Canada in €/t	1,445 - 1,454	1,432 - 1,440	1,316 - 1,324
from Scandinavia and Canada in US\$/t	1,650 - 1,660	1,650 - 1,660	1,550 - 1,560
Southern softwood from the US in €/t	1,393 - 1,401	1,379 - 1,388	1,273 - 1,282
Southern softwood from the US in US\$/t	1,590 - 1,600	1,590 - 1,600	1,500 - 1,510
Bleached hardwood pulp²⁾			
Birch pulp from Scandinavia in €/t	1,235 - 1,252	1,197 - 1,224	942 - 951
Eucalyptus pulp			
from Portugal/Spain in €/t	1,209 - 1,235	1,197 - 1,224	942 - 951
from South America in €/t	1,209 - 1,235	1,197 - 1,224	942 - 951
from South America in US\$/t	1,380 - 1,410	1,380 - 1,410	1,110 - 1,120
Southern hardwood in €/t	1,165 - 1,200	1,154 - 1,189	891 - 900
Southern hardwood in US\$/t	1,330 - 1,370	1,330 - 1,370	1,050 - 1,060
Hardwood BCTMP			
from Scandinavia and Canada in €/t	543 - 578	538 - 573	492 - 526
from Scandinavia and Canada in US\$/t	620 - 660	620 - 660	580 - 620
¹⁾ Exchange rate as of 6 July 2026: US\$1 = €0.876, Price negotiations were still ongoing in early week 28. ²⁾ Preliminary prices for bleached hardwood pulp were adjusted in line with the outcome of the negotiations.			
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The German Graphic Paper Alliance (Agrapa) also presented figures on the past business year, which show that the utilisation rate of graphic paper stood at 86 per cent in 2025. Although this means that the percentage fell slightly short of the 88 per cent seen a year earlier, the target of 80 per cent agreed under a voluntary commitment with the German Federal Ministry of the Environment was attained. This rate relates the amount of recovered graphic paper that is materially recycled to the apparent consumption of graphic paper. However, Agrapa did not provide any figures on the actual volume of recovered paper that was recycled.

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Comieco: 87 per cent of paper packaging in Italian Mc Donald's restaurants is recycled

📄 **EUWID +** 08 July 2026 | ⌚ ~ 2 min | [Published in issue 28/2026](#)

As recent study from Italy shows that paper packaging waste in Italian Mc Donald's restaurants is recycled at a high rate. The study, which was carried out by Ambiente Italia and commissioned by the Italian recycling consortium Comieco, packaging manufacturer Seda and the fast-food chain Mc Donald's, analysed the behaviour of around 1,000 customers in seven Italian Mc Donald's restaurants. Researchers observed customers disposing of their waste into separate collection bins and subsequently checked the actual destination of the collected materials.

The study found that 84 per cent of total waste generated in the restaurants was correctly sorted by customers, compared with just 68 per cent of household waste at national level. The recycling rate of the waste streams analysed in the study stood at 67 per cent and was also above the Italian average of 54 per cent.

Paper-based packaging proved to be a key driver of these results. According to the research, more than 88 per cent of packaging and service items used in the restaurants – including napkins, placemats, straws and food containers – are paper-based. The recycling rate for paper packaging at the seven restaurants hosting the study reached 87 per cent.

Customer sorting errors were reportedly limited to around one in ten cases. The study notes that the restaurants provided clearly labelled bins for separate collection at multiple collection points. This indicates that clear information, effective collection systems and simple disposal procedures can significantly improve recycling performance, the authors write. "When people are informed and actively involved, they become part of the circular economy," said Antonio D'Amato, President of the Seda International Packaging Group.

At the same time, the authors identified further potential for improvement. To achieve better results, it was essential to optimise the entire process: from waste separation by customers to its handling by staff, adequate collection frequency by waste services and improved logistics for collection, said Comieco's General Manager Roberto Di Molfetta. This would increase paper recovery and reduce residual waste. "The fast-food sector has the potential to reduce unsorted waste to zero," Mr Di Molfetta concluded.

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Longer lead times and higher prices for coreboard on the German market

EUWID + 08 July 2026 | ~ 2 min | Published in issue 28/2026

The German coreboard market has shown some changes since EUWID's previous survey in mid-May. At that time, coreboard producers were still negotiating price increases of €40-60/t, with most settlements ultimately concluded at hikes of €50/t for the second quarter. No further price initiatives are currently evident. With the summer holiday period approaching, market participants do not expect any significant price movements in the near term.

Lead times for all coreboard grades reported to EUWID are unusually long at present. According to market participants, this is primarily due to the closure of Cenpa and one of Julius Schulte's mills, coupled with operational difficulties at one Italian coreboard producer. However, this mainly affects coreboard used for tissue cores, as production at Schulte and Cenpa has recently focused on these products. According to market participants, the extended lead times remain manageable for converters because demand for heavy-duty cores continues to be relatively subdued.

Producers of industrial cores have nevertheless succeeded in passing on part of the recent coreboard price increases to their customers. However, some market participants said the adjustments had fallen short, as coreboard represents only one component of their overall cost base. According to sources, companies are also facing rising transport costs and increasingly limited haulage capacity.

Core producers face DoC requests despite PPWR exemption

In addition to rising costs, players in the German cores market were also complaining about a significant administrative burden in connection with the European Packaging and Packaging Waste Regulation (PPWR).

Although industrial cores covered by EUWID research are not packaging and thus not subject to the PPWR, recent conversations indicated that, with the 12 August start date looming, the core industry's customers were now almost universally insisting on declarations of conformity for these products, too. Industry contacts told EUWID that gathering and processing all the required data from upstream suppliers was highly time-intensive and scarcely manageable without using artificial intelligence.

EUWID Price Watch Germany Coreboard			
July 2026			
Prices in € per tonne free delivered	02 July 2026	27 March 2026	27 June 2025
Coreboard 250 J/m ² , 0.7 mm	640 - 700	590 - 650	630 - 680
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German printing industry business climate up in June

EUWID + 08 July 2026 | ~ 2 min | Published in issue 28/2026

Business sentiment in the German printing and media industry improved slightly in June. Both companies' assessment of current business conditions and their expectations for the next six months were more positive than in May. The findings are based on the latest business climate index published by the German Printing and Media Industries Federation (BVDM), which is compiled from the ifo Institute's business surveys.

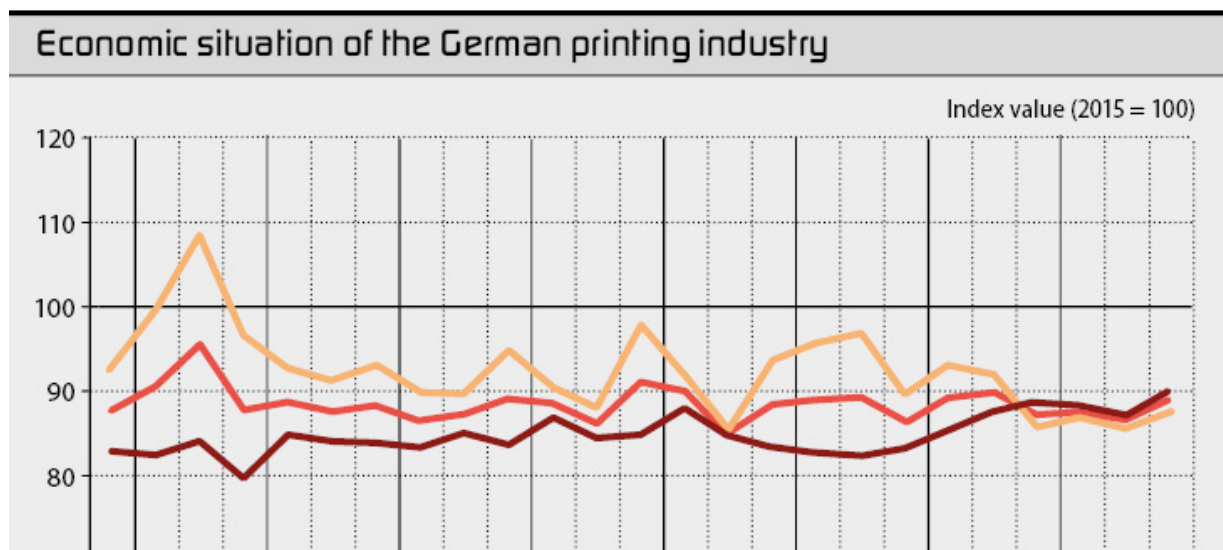
The seasonally adjusted business climate index increased by 2.7 per cent month on month to 89.0 points. However, it remained 2.7 per cent below the level recorded in the corresponding month of last year.

The business situation index rose by 3.1 per cent in June to 90.1 points, exceeding the year-earlier level by 5.9 per cent. According to the BVDM, 8 per cent of the surveyed companies described their current business situation as good, 70 per cent as satisfactory and 22 per cent as poor. The corresponding balance improved from -19 to -14 points.

Companies also assessed their order books more favourably than in the previous month. Six per cent of respondents described their order situation as good, 62 per cent as satisfactory and 32 per cent as poor. At -27 points, the resulting balance was significantly better than the -46 points recorded a year earlier. Nevertheless, the BVDM noted that both business conditions and order books remain under pressure despite the improvement.

Expectations for the next six months also became slightly more optimistic. The seasonally adjusted expectations index increased by 2.3 per cent compared with May to 87.8 points, although it remained 10.6% below the level of June 2025. Five per cent of the surveyed companies expect business conditions to improve, while 22 per cent anticipate a deterioration. The remaining 73 per cent expect business conditions to remain broadly unchanged. As a result, the expectations balance improved from -34 to -31 points.

Price expectations continue to point to stable or rising selling prices. Twenty-two per cent of respondents expect prices to increase over the next three months, while 72 per cent foresee no change and only 6 per cent expect prices to decline.





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Paper mills implement significant price increases for heatset newsprint in Germany

Kraftliner prices also edge higher in early July

🔗 **EUWID +** 08 July 2026 | ⌚ ~ 6 min | [Published in issue 28/2026](#)

Newsprint manufacturers instituted higher prices in Germany with effect from 1 July. During tricky third-quarter price negotiations, it quickly became clear that many paper manufacturers were taking different approaches, depending on the segment in question. Several market players were pushing through steeper hikes for heatset grades than for coldset newsprint.

Sources told EUWID that mid-June price increases for unbleached kraftliner did not stem from tough negotiations. Instead, manufacturers had simply delayed the mark-ups as a concession to converters. Numerous capacity closures are currently strengthening producers' position, as well.

Publication paper mills push for price increases and target project business

The latest round of negotiations in the German newsprint market has proved difficult, according to market participants. At the time of research, most third-quarter contracts were said to have been agreed in principle. However, instead of granting the seasonal summer discounts typically seen at this time of year, paper mills have been pushing through price increases. Buyers say this has left both newspaper publishers and, in particular, commercial printers facing an increasingly challenging market environment, with buyers of heatset papers under particular pressure. While price increase demands for coldset grades have remained comparatively moderate, some paper mills have sought increases for heatset grades that were in some cases twice as high. As a result, negotiations in the heatset segment have become increasingly confrontational.

For coldset newsprint, price increases of around €20/t are emerging, which would lift prices to approximately €600/t or slightly below. In isolated cases, however, market participants reported demands of up to €30/t and target prices of €615-620/t. In the heatset segment, paper mills have been seeking significantly steeper increases. Demands of €20-30/t represented the lower end of the range, while some mills pushed for increases of €40/t and, in certain cases, more than €50/t.

According to buyers, both the level of the price increase demands and their implementation varied depending on the starting price level, paper supplier and market segment. Market sources also report that paper mills frequently insisted on minimum price levels and, in many cases, succeeded in enforcing them.

The main reason for the varied approach by paper mills is the widening gap between list prices for coldset newsprint and project business prices in the heatset segment, with the low-end prices increasingly uneconomic for paper producers, EUWID-sources say. Therefore, several paper mills have made it a priority to narrow this gap as quickly as possible. The latest massive price increases for heatset grades are seen as a first step towards narrowing this gap. At the same time, representatives of the paper industry have made it clear that they see further adjustment potential and intend to pursue additional price increases in the future.

Paper producers believe current market conditions are supporting their efforts to improve margins. According to industry representatives, some mills are operating at very high utilisation rates, meaning that not all requested volumes can be supplied at short notice.

Other market participants, however, question whether this high utilisation rate is solely the result of strong demand. Instead, they argue that machine downtime and portfolio adjustments have tightened supply. In addition, high operating rates at paper mills are being driven less by domestic demand than by export business.

Paper producers justify their approach by pointing to several factors. On the one hand, they cite the continuing trend towards downgrading, from which newsprint in particular has benefitted. On the other hand, they describe their economic situation as increasingly critical. Sharply rising costs for energy, logistics, chemicals and spare and wear parts are placing a significant burden on paper mills' profitability. In addition, persistently high temperatures have made it more difficult to maintain production, some experts claim. Against this backdrop, paper mills argue that restoring commercially sustainable business conditions is essential.

On the other hand, the paper producers' approach has drawn strong criticism. Both newspaper publishers and commercial printers in Germany are complaining that the price increases are further exacerbating the already severe challenges facing the printing industry.

Representatives of the media industry argue that paper manufacturers underestimate the economic pressures facing newspaper publishers and printing companies and are making matters worse through price increases. In many cases, competitive market conditions leave little or no scope for passing higher paper costs on to customers, they say. In addition, the terms of long-term contracts often cannot be renegotiated until the turn of the year. Representatives of the publishing industry therefore fear that higher paper prices will not result in larger advertising budgets but instead accelerate the decline in print advertising volumes.

Printing industry representatives consider the proposed price increases difficult to justify under current market conditions. They argue that demand for newsprint in Germany and across Europe remains below available production capacity. At the same time, advertising activity has weakened noticeably, while structural changes continue to erode demand from newspaper publishers.

Industry experts also see growing uncertainty over the impact of artificial intelligence on the digital advertising market. They warn that AI is fundamentally reshaping digital advertising and increasingly calling into question the ability of publishers to monetise website traffic. Should advertising revenues come under further pressure, the business models of many publishers could be significantly affected. In the view of market participants, the changes ahead have the potential to fundamentally reshape the publishing industry.

Kraftliner prices buoyed by machine downtime

Following a second increase in brown kraftliner prices within just a few weeks, price rises for kraftliner have now exceeded those implemented for recycled corrugated case materials. Market participants told EUWID that the staggered implementation of higher unbleached kraftliner prices in Germany – in the middle of the month and, in some cases, from 1 July – was intended as a concession to converters rather than the result of difficult negotiations. Producers believed they could have implemented

the full increase from 1 June. The market has now settled at a uniform increase of €60/t in July, bringing the cumulative rise on the market in Germany to €120/t.

Insiders described manufacturers as operating at healthy workloads. Although there have been no delivery bottlenecks in recent weeks, it would also be inaccurate to describe supply as plentiful. Sources said that deliveries were being made strictly in line with budgeted allocations, with neither additional volumes nor shortfalls. Market rumours suggest that one key European manufacturer has pushed back scheduled maintenance work by 12 months because of strong order books in recent months.

Kraftliner manufacturers' stronger position does not stem from a recovery in demand from the corrugated board industry. Packaging manufacturers continue to operate below capacity, with utilisation rates only just matching their plans. Instead, kraftliner producers were reportedly in a stronger position because of developments on the global market. Market players point out that developments such as price increases, production stoppages or major capacity reductions in overseas markets typically reach Germany only after a lag of several months. This was also true of substantial capacity cuts in North America. Although kraftliner imports from this region traditionally played only a minor role in the German market, any tightening of supply affects international trade flows. Against this backdrop, some market participants are speculating that producers could attempt to institute another price increase.

Semi-chemical fluting, which has been used in only tiny quantities in Germany for many years now, has not changed in price in Germany despite the recent announcements and implementations. Sources painted a different picture for white-top kraftliner, noting that the €40/t hike that producers pushed through as of mid-June is taking effect across the board from the beginning of July.

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Smurfit Westrock to shut Birmingham paper mill on 27 July

07 July 2026 | [Frauke Schmidt](#) | 🕒 ~ 1 min | [Published in issue 28/2026](#)

Smurfit Westrock has confirmed that production at its SSK paper mill in Birmingham, UK, will cease on 27 July, following the consultation process [announced at the end of April](#). According to the company, no viable alternatives to closing the site were identified.



Smurfit Westrock said the decision was driven by persistently challenging market conditions, combined with the need to optimise its UK manufacturing footprint and improve its long-term competitiveness. The mill's annual production capacity of around 200,000 t of fluting and liner will be redistributed across other paper mills within the company's European network.

The Birmingham mill primarily supplies the UK and Irish corrugated packaging markets. Smurfit Westrock said customers would continue to be served through its wider European mill network without disruption.

The closure will affect 117 employees. According to the company, affected staff will receive career transition support and, where possible, be offered redeployment opportunities within the group.

The closure of the Birmingham mill had already been announced as a proposal on 30 April. With the consultation process now completed, Smurfit Westrock has confirmed that operations at the site will end on 27 July.

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New takeover offer for Fibre Excellence, decision postponed again

📅 EUWID + 07 July 2026 | Valeria Buß | ⌚ ~ 1 min | Published in issue 28/2026

The commercial court of Toulouse has once again postponed its decision on the future of French pulp producer Fibre Excellence. Following the submission of a new takeover offer, the court decided to postpone the hearing to review the offer until 27 July, the company announced. The final decision had already been postponed once before, from 17 June to 6 July.



The future of insolvent pulp producer Fibre Excellence is still not decided

Recently, new developments have emerged regarding Fibre Excellence. After the company's management [withdrew its takeover offer for the business](#), which is currently owned by Indonesian entrepreneur Jackson Wijaya, a new interested party entered the process: French investment banker Matthieu Pigasse expressed his willingness to become involved and submitted a takeover offer to the commercial court on 2 July. According to Fibre Excellence, the extension of the deadline is intended to allow the investor to further consolidate his offer. Discussions with the French state are reportedly still ongoing.

Numerous such discussions have already taken place in the past months. According to a spokesperson for the Filpac CGT trade union, some conditions considered essential to restoring the group's competitiveness have still not been met. These include an adjustment of the feed-in tariff for biomass energy, securing 25 per cent of wood supply from French public forests and the reintegration of the Saint-Gaudens mill into the European CO₂ emissions trading system. The financing for the takeover was secured, the spokesperson said. The focus was now on ensuring the profitability of production over the next two to three years.

Fibre Excellence operates two pulp mills in Saint-Gaudens and Tarascon in southern France. The two sites have a combined capacity of 500,000 tpy of softwood and hardwood pulp.

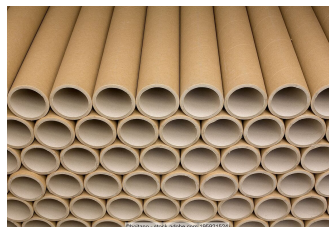
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Julius Schulte winds down production at Düsseldorf coreboard mill

📅 EUWID + 02 July 2026 | [Kristin Trede](#) | ⌚ ~ 1 min | [Published in issue 28/2026](#)

Julius Schulte Söhne produced the last ton of board at its coreboard mill in Düsseldorf-Bilk, Germany on 26 June, ending a 140-year industrial history. By 2027, the site is to be operated only as a slitting centre for paper coming from the Trebsen mill.



The mill closure marks the end of Julius Schulte's coreboard production for industrial cores. In recent years, however, the production of board for heavy-duty, industrial cores had accounted for only a relatively small share of the plant's total output.

Production of coreboard for the tissue market, by contrast, is to be continued at the Trebsen site, where the company wants to expand the existing product portfolio. Julius Schulte plans to add up to 80,000 t of coreboard to its corrugated case material production there. The Trebsen mill currently manufactures 250,000 tpy of corrugated case material. Coreboard production has reportedly already been integrated.

The two machines at the idled Düsseldorf-Bilk site are now up for sale. The total capacity of the machines was most recently put at around 100,000 tpy. One of the two machines produced coreboard for tissue cores in basis weights of 140 to 280 g/m². It has a working width of 2.20 m and can run at speeds of 307 m/min. The second coreboard machine covers a grammage range of 150 to 630 g/m², has a working width of 2.40 m and a running speed of 420 m/min.

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Mercer Rosenthal to suspend pulp production in September

02 July 2026 | 🕒 ~ 1 min | [Published in issue 28/2026](#)

Mercer International will idle production at its Rosenthal pulp mill in Germany in September. The company is extending a maintenance shutdown originally planned for two weeks to cover the entire month.



Mercer Rosenthal employs around 400 people and produces a range of wood-based products, including kraft

pulp, tall oil and lignin. The company puts the mill's pulp capacity at 360,000 tpy of northern bleached softwood kraft (NBSK) pulp. Mercer also operates a large biomass power plant at the Rosenthal site, with a capacity of 413 MW thermal and 57 MW electrical.

Mercer has not explicitly commented on the reasons behind the extended maintenance downtime in September. However, market conditions for European softwood pulp producers are currently considered challenging with high fibre costs and weak prices shaping the market.

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Suzano and Kimberly-Clark launch Arbex tissue joint venture

01 July 2026 | 🕒 ~ 2 min | [Published in issue 28/2026](#)

Brazilian pulp and paper manufacturer Suzano and US company Kimberly-Clark have announced in a joint statement that their new tissue joint venture has started operations on 1 July. It will act as an independent business, headquartered in the Netherlands, under the name of Arbex. The two companies had [announced the formation](#) of the \$3.4bn joint venture in June 2025.



Arbex is described as one of the world's largest players in the tissue and hygiene products market. The company was formed by combining Suzano's business with Kimberly-Clark's International Family Care and Professional (IFP) business. The two companies earlier reported that Suzano would acquire a 51 per cent stake in the new company, while Kimberly-Clark would retain the remaining 49 per cent. Kimberly-Clark's family care and professional business lines in North America were not part of the deal and remained with the company.

Arbex runs 22 production sites in 14 countries which can produce around 1 million t of tissue per year. The portfolio consists of household and professional hygiene products, including more than 40 regional brands such as Andrex, Hakle and Scottex. Arbex also holds a long-term license for the use of Kimberly-Clark's global brands such as Kleenex and Cottonelle, amongst others, the joint statement says. The new company employs approximately 9,000 people and is expected to generate around \$3.3bn in annual sales.

Ehab Abou-Oaf becomes CEO of Arbex

The new company will be led by Ehab Abou-Oaf, who previously served as President of Kimberly-Clark's IFP business, the statement says. He will be based in London, alongside the majority of the global leadership team.

Luís Bueno, previously Executive Vice President of Suzano's consumer goods business, becomes COO of Arbex, while Oscar Mousinho, most recently Global CFO of the Pet Nutrition business at Mars, was reportedly named CFO. Walter Schalka, who spent over a decade as CEO of Suzano before stepping down in 2024, will chair Arbex's Board of Directors.

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